



# 2019 Bellevue Survey of Businesses

Final Report

SUBMITTED:

October 2019

SUBMITTED TO:

City of Bellevue, WA

Northwest Research Group, LLC

[Blank page inserted for pagination purposes.]

# TABLE OF CONTENTS

## CONTENTS

Table of Contents .....	3
• Contents .....	3
• List of Figures .....	5
Executive Summary .....	7
• Background and Methodology.....	7
• Key Metrics.....	7
• Community Characteristics .....	9
• Business Health .....	10
• Employees and Staffing.....	10
Project Overview .....	11
• Background and Objectives.....	11
• Questionnaire.....	11
• Methodology.....	12
• Sample Size and Margin of Error.....	13
Key Findings: Business Characteristics .....	14
• Demographics .....	15
• Geographic Markets Sold To .....	16
• Supplier Location(s).....	18
Key Findings—Operating a Business in Bellevue .....	19
• Bellevue as a Place to Operate a Business .....	19
• Quality of Services Provided to Businesses.....	21
• Direction Bellevue is Headed .....	23
• Reasons for Moving in The Right Direction.....	24
• Reasons for Moving in the Wrong Direction.....	26
• Value for Tax Dollar .....	29
• Comparison to Residential Survey .....	32
• Most Important Business-Related Issue Facing Bellevue .....	34

- Likelihood to Recommend Starting a Business in Bellevue ..... 37
- Factors with the Biggest Future Impact on Businesses..... 38
- Key Findings—Community Characteristics ..... 49
  - Overall Community Characteristics..... 49
  - Business Attributes ..... 52
  - Physical Attributes ..... 55
  - Transportation and Housing Attributes ..... 57
- Key Findings—Small Business Resources ..... 62
- Key Findings—Business Health ..... 69
  - Current Economic Strength of Business..... 69
  - Bellevue’s Economy Compared to Rest of Puget Sound..... 70
  - Anticipated Economic Strength of Business ..... 72
  - Anticipated Changes to Capital Expenditures..... 75
- Key Findings –Employees and Staffing..... 77
  - Location of Employee Talent Pool ..... 77
  - Anticipated Changes to Number of Bellevue-Based Employees ..... 79
- Key Findings—Broadband Internet..... 85
  - Technology Services Subscribed To ..... 85
  - Quality of Internet Service ..... 86
- Key Findings—Additional Topics ..... 87
  - Customer Service Related to Business and Occupation Taxes ..... 87
  - Incentives for Alternative Transportation..... 88
- Appendix I—Business Geographies..... 91
- Appendix II—Age and Size of Business ..... 92
- Appendix III—Questionnaire ..... 93

## LIST OF FIGURES

Figure 1: Business Demographics.....	15
Figure 2: Location Selling Goods and Services – By Sector – 2019 Only .....	17
Figure 3: Location of Suppliers – By Sector – 2019 Only.....	18
Figure 4: City of Bellevue as a Place to Operate a Business – Year-Over-Year .....	19
Figure 5: City of Bellevue as a Place to Operate a Business – By MEC – 2019 Only .....	20
Figure 6: Quality of Services Provided to Businesses – Year-Over-Year .....	21
Figure 7: Quality of Services Provided to Businesses – By MEC – 2019 Only .....	22
Figure 8: Direction City is Headed – Year-Over-Year .....	23
Figure 9: Reasons Bellevue is Moving in the Right Direction (n=692) .....	24
Figure 10: Reasons Bellevue is Moving in the Wrong Direction (n=307).....	27
Figure 11: Value Received for Money – Year-Over-Year.....	29
Figure 12: Value Received for Money – By Sector – 2019 Only.....	30
Figure 13: Value Received for Money – By MEC – 2019 Only.....	31
Figure 14: Comparison of Bellevue Businesses to Bellevue Residents .....	33
Figure 15: Biggest Problems Facing Bellevue – Year-Over-Year .....	35
Figure 16: Likelihood of Recommending Starting a Business in Bellevue – Year-Over-Year .....	37
Figure 17: Factor with the Biggest Impact on Businesses.....	39
Figure 18: Factors with the Biggest Impact – 2019 Only .....	40
Figure 19: Factors with the Biggest Impact – Business Services – 2019 Only.....	41
Figure 20: Factors with the Biggest Impact – Information Technology – 2019 Only.....	42
Figure 21: Factors with the Biggest Impact – Retail – 2019 Only .....	43
Figure 22: Factors with the Biggest Impact – Tourism – 2019 Only .....	44
Figure 23: Factors with the Biggest Impact – “Creative Industries” Sector – 2019 Only.....	45
Figure 24: Factors with the Biggest Impact – “Other” Sector – 2019 Only.....	46
Figure 24: Impact of Workforce Across Sectors– 2019 Only.....	47
Figure 25: Overall Community Characteristics.....	49
Figure 26: Ratings for Community Characteristics: 2019.....	50
Figure 29: Community Characteristics for Operating a Business in Bellevue – Year over Year (2015 not shown, but comparisons made) .....	51
Figure 27: Changes in Business Attribute Ratings 2015 - 2017.....	53
Figure 28: Business Attributes for Operating a Business in Bellevue by Sector – 2019 Only .....	54
Figure 29: Changes in Physical Attribute Ratings 2015 - 2017.....	55
Figure 30: Physical Attributes for Operating a Business in Bellevue by Sector – 2019 Only .....	56
Figure 31: Ability to Get Around Town by Biking or Walking.....	57
Figure 32: Access to Public Transportation Services.....	58
Figure 33: Parking Availability for Employees.....	59



Figure 34: Vehicle Traffic Effect on Business .....	60
Figure 35: Range of Affordable Housing Options for Employees.....	61
Figure 36: Access to Business Organizations or Business Service Providers.....	63
Figure 37: Access to Capital to Grow Business.....	64
Figure 38: Access to Support Services for New Businesses .....	65
Figure 39: Access to Incubators .....	66
Figure 40: Access to Affordable Office, Industrial, or Other Working Spaces .....	67
Figure 41 Current Economic Strength of Business.....	69
Figure 42: Current Bellevue Economy Compared to Puget Sound Communities – 2019 Only.....	70
Figure 43: Perceived Strength of Bellevue’s Economy by Current Economic Strength of Business .....	71
Figure 44 Current Economic Strength of Business.....	73
Figure 45: Economic Strength in Next 3-5 Years by Current Economic Strength of Business .....	74
Figure 46 Current Economic Strength of Business.....	75
Figure 47: Change in Capital Expenditures by Current Economic Strength of Business.....	76
Figure 48: Location of Employee Talent Pool.....	77
Figure 49: Location of Employee Talent Pool– By Sector – 2019 Only .....	78
Figure 50 Current Economic Strength of Business.....	79
Figure 51: Anticipated Change in Number of Bellevue-Based Employees by Size of Firm (2019 Only) .....	80
Figure 52: Types of Employees Expecting to Hire in Next 12 Months .....	81
Figure 53: Factors Affecting Ability to Hire / Retain Employees s .....	82
Figure 54: Anticipated Types of Employees to be Hired – Year over Year.....	83
Figure 55: Technology Services Currently Subscribed To – Year over Year .....	85
Figure 56: Internet Access by Business Sector – 2019 Only.....	85
Figure 57: Adequacy of Current Internet Service – 2017 to 2019 .....	86
Figure 58: Anticipated Adequacy of Future Internet Service – Year over Year .....	86
Figure 59: Satisfaction Related to Customer Service Dealing with Bellevue Taxes – Year over Year .....	87
Figure 60: Incentives for Alternative Transportation – Year over Year .....	88
Figure 61: Incentives for Using Alternative Transportation Modes by Location(2019).....	89
Figure 62: Incentives for Using Alternative Transportation Modes by Business Size (2019) .....	89
Figure 63: Likelihood of Offering Incentives for Alternative Transportation – By Sector – 2019 Only.....	90

# EXECUTIVE SUMMARY

## BACKGROUND AND METHODOLOGY

The 2019 Bellevue Biennial Business survey represents the third comprehensive survey of businesses located within Bellevue conducted by the City of Bellevue; the first was in 2015. The survey is designed to support Bellevue’s Business Retention & Expansion Program, better understand the needs of local businesses and enable the City to deliver quality services to the business community. Survey results will be used, in part, to guide City policy and programmatic decisions for economic development, infrastructure, and services to support long-term economic growth. The survey addresses Bellevue’s key metrics, attitudes about operating and owning a business in Bellevue, starting a business in Bellevue, questions relating to taxation, and general questions about safety, transportation and other areas affecting businesses.

To conduct this survey, the city provided a list of businesses physically located within the city limits of Bellevue. An attempt was made to contact each business on the list, either via email, postal mail or phone calls. The 2019 business survey was conducted between June 5 and July 15, 2019 and resulted in a total of 1,025 interviews—388 completed over the telephone and 637 completed via the Web. The number of surveys completed each year has increased as Bellevue has grown; year over year approximately one out of seventeen (6%) of Bellevue businesses complete the survey.

## KEY METRICS

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

Bellevue businesses have consistently agreed that Bellevue is better than other cities and towns ad a place to do business.

Bellevue as a Place to Operate a Business			
	2015	2017	2019
<b>Better Than</b>	74%	74%	77%
<b>Significantly Better</b>	21%	22%	24%
<b>Better</b>	53%	53%	53%
<b>The Same</b>	19%	18%	16%
<b>Worse</b>	7%	7%	8%
<b>Mean</b>	7.01	7.04	7.13

Bellevue businesses see an improvement in the quality of services provided to business.

Quality of Services Provided to Businesses			
	2015	2017	2019
<b>Exceeds Expectations</b>	66%	68%	72%↑
<b>Greatly</b>	16%	18%	22%↑
<b>Somewhat</b>	50%	51%	50%
<b>Meets</b>	25%	24%	20%
<b>Does not Meet</b>	9%	8%	8%
<b>Mean</b>	6.58	6.74	6.93↑

While the majority of businesses continue to agree that the city is headed in the right direction, there has been a notable downward trend among Information Technology companies. Reasons behind this trend should be explored further and carefully monitored.

Direction City is Headed			
	2015	2017	2019
Headed in Right Direction	69%	69%	69%
Strongly Right	19%	20%	23%
Somewhat Right	50%	49%	46%
Neither Right nor Wrong	19%	18%	16%
Headed in Wrong Direction	11%	12%	15%
Mean	6.72	6.70	6.73

The majority of Bellevue businesses would recommend doing business in Bellevue.

Likelihood of Recommending Doing Business in Bellevue			
	2015	2017	2019
Likely to Recommend	57%	60%	58%
Extremely Likely	13%	14%	15%
Likely	44%	46%	44%
Neutral	25%	22%	21%
Not Likely	18%	18%	20%
Mean	5.99	6.13	5.98

The majority of Bellevue businesses feel that they are getting good to excellent value for the tax dollars they pay. There is a significant relationship between perceived value of services and direction the city is headed.

Value of Services for Tax Dollars Paid			
	2015	2017	2019
Receive Value	Question Text Not the Same	59%	61%
Excellent Value		13%	14%
Good Value		46%	46%
Neutral		25%	22%
Poor Value		17%	17%
Mean		6.10	6.21

Nine out of ten Bellevue businesses feel that Bellevue's economy is better than other Puget Sound cities and towns.

Perceptions of Bellevue's Economy			
	2015	2017	2019
Better Than	92%	90%	91%
Significantly Better	40%	43%	43%
Better	52%	46%	48%
The Same	6%	8%	6%
Worse	2%	2%	2%
Mean	8.04	8.04	8.05

Bellevue businesses continue to face the same top two problems.



## 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.”

The majority of Bellevue business view the city in a positive light. However, the mean ratings suggest that they see the city as being somewhat better rather than significantly better than other cities. These ratings have been consistent over the years.

	2015	2017	2019
Better	66%	67%	71%
The Same	22%	22%	17%
Worse	11%	11%	12%
Mean	6.13	6.15	6.26

Much Better

- Quality of Police and EMS
- Overall Feeling of Safety
- Physical Appearance of Business Location
- Access to Continuing Education Opportunities
- Ability to Get Around Safely Walking & Bicycling

Better

- Access to Public Transportation Services
- Availability of Qualified Employees
- Parking Availability for Employees
- Development Services for Permitting and Licensing
- Utility Costs

The Same

- Extent to Which Vehicle Traffic Affects Your Business

Worse

- Range of Affordable Housing Options for Employees

## BUSINESS HEALTH

Four out of five Bellevue businesses continue to feel that the economic health of their business is strong.

CURRENT ECONOMIC HEALTH OF BUSINESS			
	2015	2017	2019
<b>Strong</b>	80%	79%	80%
<b>Very Strong</b>	23%	23%	24%
<b>Strong</b>	57%	56%	56%
<b>Neutral</b>	12%	11%	12%
<b>Weak</b>	8%	10%	8%
<b>Mean</b>	7.10	7.08	7.14

The majority of Bellevue businesses suggest that they anticipate little change in their near-term (next 12 months) capital expenditures.

Half of those who feel their current economic strength is very strong anticipate increasing their capital expenditures. On the other hand, one fourth of those who feel their current economic strength is very weak suggest they will decrease their capital expenditures.

While still generally optimistic, Bellevue businesses are more likely than in previous years to feel that their business growth will slow.

ANTICIPATED ECONOMIC STRENGTH OF BUSINESS 3-5 YEARS			
	2015	2017	2019
<b>Improve</b>	62%	61%	53%↓
<b>Improve significantly</b>	20%	18%	15%↓
<b>Improve somewhat</b>	42%	43%	38%
<b>Stay about the same</b>	25%	28%	29%
<b>Slow Down</b>	12%	12%	18%↑
<b>Mean</b>	3.67	3.64	3.46↓

PLANNED CAPITAL EXPENDITURES NEXT 12 MONTHS			
	2015	2017	2019
<b>Increase</b>	38%	43%	38%
<b>Increase significantly</b>	6%	6%	5%
<b>Increase somewhat</b>	32%	37%	33%
<b>No Change</b>	55%	51%	55%
<b>Decrease</b>	7%	6%	7%
<b>Mean</b>	3.33	3.41	3.34

## EMPLOYEES AND STAFFING

While the majority of businesses report that their employee talent pool is located in Bellevue or elsewhere in Puget Sound, this figure decreased in 2019, notably in terms of the percentage based elsewhere in the Puget Sound region.

Percent of Talent Pool Drawn From . . .					
2015		2017		2019	
Bellevue	Puget Sound	Bellevue	Puget Sound	Bellevue	Puget Sound
35%	47%	41%	47%	37%	40%
82%		88%		77%	

The majority of Bellevue businesses indicate that there will be no change in the number of Bellevue-based employees they expect to have in the next year.

ANTICIPATED CHANGE IN NUMBER OF BELLEVUE BASED EMPLOYEES NEXT 12 MONTHS			
	2015	2017	2019
<b>Increase</b>	32%	32%	32%
<b>No Change</b>	61%	59%	60%
<b>Decrease</b>	7%	8%	8%
<b>Mean</b>	3.26	3.25	3.24

## PROJECT OVERVIEW

### BACKGROUND AND OBJECTIVES

The 2019 Bellevue Biennial Business Survey is third second survey conducted of businesses by the City of Bellevue; the first was conducted in 2015. The survey is designed to support Bellevue’s Business Retention & Expansion Program, better understand the needs of local businesses and enable the City to deliver quality services to the business community. The survey results will be used, in part, to guide City policy and programmatic decisions for economic development, infrastructure, and services to support long-term economic growth.

### QUESTIONNAIRE

As this was the third the survey was conducted, careful consideration was taken to maintain consistency with questions asked previously to enable trend analysis. Some additional questions were asked specifically to gain insights from smaller businesses. Key measures from Bellevue’s Performance Measures Survey were kept or modified slightly for inclusion in the Business survey. The average survey time for the 2019 Business Survey was 11 minutes by phone and 14 minutes on the web up slightly from an average of 10 minutes by phone and 9 minutes on the web in 2017. The survey included questions regarding:

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

## METHODOLOGY

The City of Bellevue provided a list of 15,894 businesses located within the City limits and categorized each business into one of six business sectors: Business Services, Information Technology, Retail, Tourism, Creative Industries (new in 2019), and Other. Where possible, contact information such as email, and phone number were appended to the sample file. The study was conducted over three phases where businesses were contacted either via email, postal mail, or telephone.

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

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

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

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

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

- *Business Sector*: Business Services, Information Technology, Retail, Tourism, Creative Industries (new in 2019), and Other Businesses
- *Major Employment Center (from sample)*: SR 520/Bel-Red, Crossroads, Downtown, Eastgate/Factoria, 116<sup>th</sup>/Bellefield, and Outside the MEC
- *Age of Business (self-reported)*: Founded prior to 1980, founded in the 1980's, founded in the 1990's, founded in the 2000's, founded in 2010 or later
- *Size of Business (self-reported)*: One person, two 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

The City provided the sample of businesses. The source of the sample is from the Washington State Department of Revenue and includes all registered businesses (N=15,894) with a location in Bellevue.

A total of 1,025 interviews or 6 percent of all Bellevue businesses were completed: 637 online and 388 via telephone. The number of surveys completed each year has increased as Bellevue has grown; year over year approximately one out of seventeen (6%) of Bellevue businesses complete the survey.

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 distribution of completed surveys is generally in line with the distribution of businesses in the sample universe.

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 percent 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. In addition, 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			
<b>Business Services</b>	100	200	300	29%	3,572	22%	8%	5.7%
<b>Information Technology</b>	16	67	83	8%	1,220	8%	7%	10.8%
<b>Retail</b>	40	52	92	9%	1,598	10%	6%	10.2%
<b>Tourism</b>	21	27	48	5%	874	5%	5%	14.1%
<b>Creative Industries (new in 2019)</b>	26	40	66	6%	1,033	6%	6%	12.1%
<b>Other</b>	185	251	436	43%	7,597	48%	6%	4.7%
<b>Total</b>	<b>388</b>	<b>637</b>	<b>1,025</b>		<b>15,894</b>	<b>100%</b>	<b>6%</b>	<b>3.1%</b>

[Blank page inserted for pagination purposes.]

## KEY FINDINGS: BUSINESS CHARACTERISTICS

### DEMOGRAPHICS

Bellevue businesses are diverse, notably in terms of employee size, number of locations, and year established. In general, business demographics have changed little over the years. There are, however, some differences.

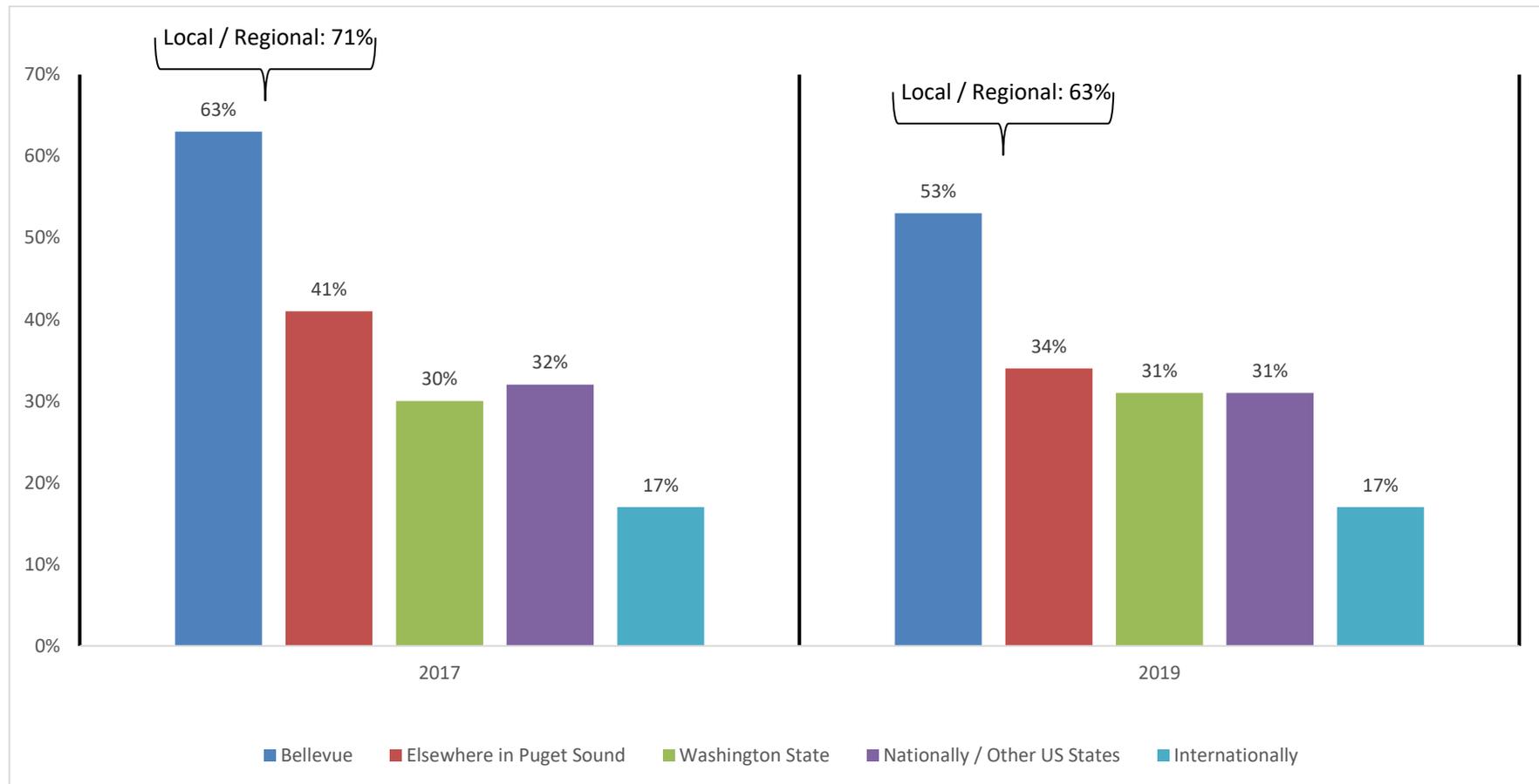
- Beginning in 2017, a greater number of non-owners of a business completed the survey.
- A greater percentage of businesses with a single employee completed the survey in 2019.
- More businesses completing the survey in 2019 had more than one location in Bellevue.

Figure 1: Business Demographics

		2015	2017	2019
<b>Position Within Company</b>	Owner	70%	<b>64%</b>	<b>62%</b>
	C-Level	8%	9%	9%
	Manager	13%	<b>17%</b>	<b>18%</b>
	Admin/Clerical	7%	7%	10%
	Other	2%	2%	2%
<b>Workspace</b>	Own	30%	30%	33%
	Lease	70%	70%	76%
<b>Number of Locations in Bellevue</b>	One	<b>87%</b>	<b>84%</b>	69%
	2 to 5	13%	15%	<b>25%</b>
	6 to 10	0%	1%	<b>3%</b>
	11 or more	0%	0%	<b>3%</b>
	<i>Mean</i>	<i>1.2</i>	<i>1.3</i>	<i>2.0</i>
<b>Number of Employees</b>	One	25%	24%	<b>32%</b>
	2 to 5	33%	32%	26%
	6 to 10	18%	15%	15%
	11 to 24	12%	14%	12%
	25 to 49	6%	7%	6%
	50 to 99	3%	4%	5%
	100 or more	4%	4%	4%
	<i>Mean</i>	<i>24.4</i>	<i>37.1</i>	<i>19.1</i>
<b>Year Established</b>	Prior to 1980	6%	9%	8%
	1980s	11%	8%	9%
	1990s	15%	15%	17%
	2000s	31%	24%	25%
	2010 or later	37%	44%	41%

## GEOGRAPHIC MARKETS SOLD TO

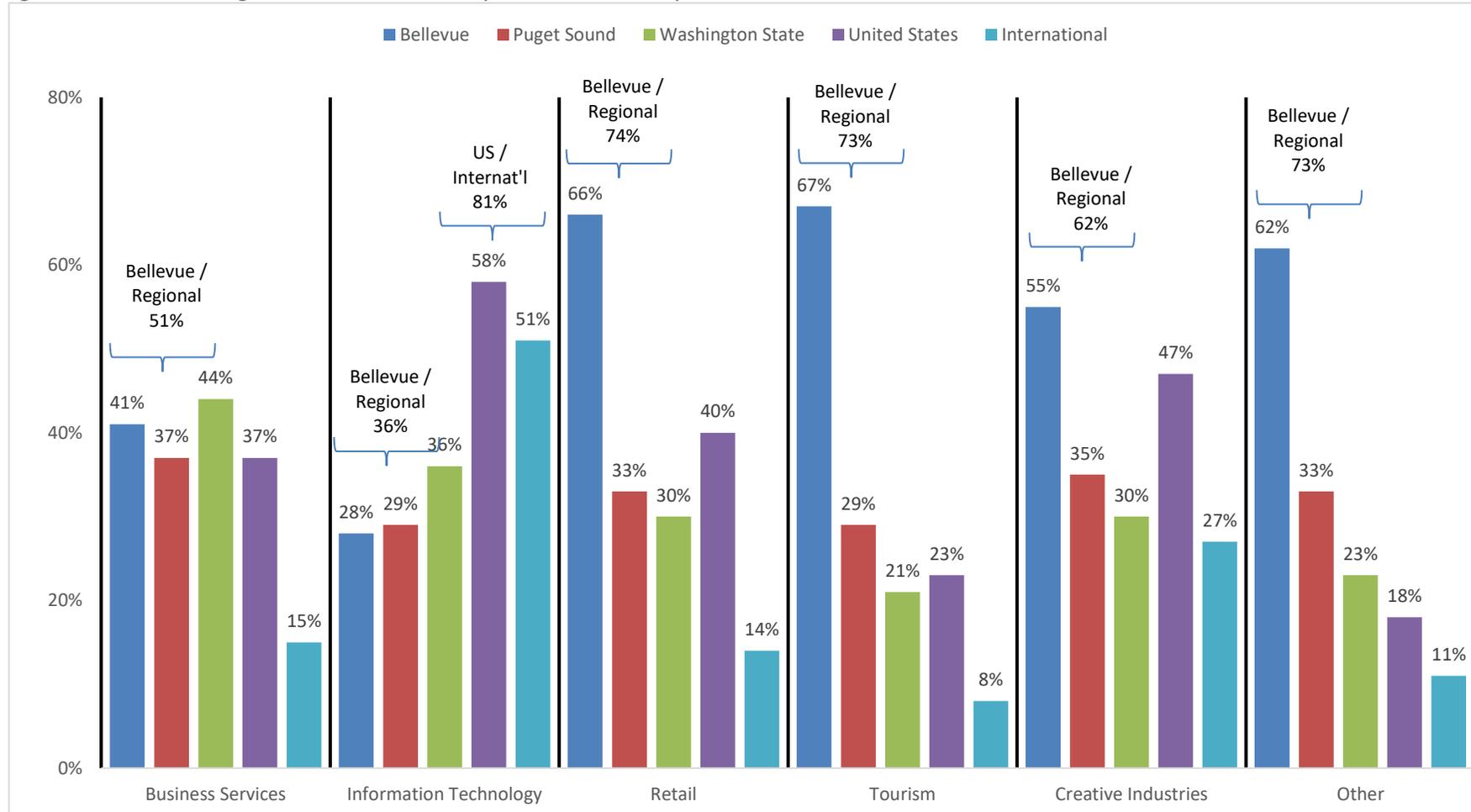
More than half of all businesses sell the majority of their goods or services in Bellevue and, to a lesser extent, elsewhere in the Puget Sound region. The percentage of businesses who primarily market locally and regionally decreased significantly between 2017 and 2019. Only 17 percent of businesses sell their products internationally.



ST9— Where do you sell your goods and services? (Note: Question was added in 2017)

Those who primarily market most of their goods and services in Bellevue are in the retail, tourism, and other business sectors. As would be expected, those in the Information Technology sector are the least likely to limit their sales to Bellevue or the larger Metro area. Rather, 81 percent of their sales are marketed nationally and/or internationally.

Figure 2: Location Selling Goods and Services – By Sector – 2019 Only



ST9— Where do you sell your goods and services? Sums to more than 100% multiple responses allowed. Note that nets for Bellevue / Regional sum to less than the sum of the individual markets due to multiple responses (i.e., they may sell in one but not the other or both)

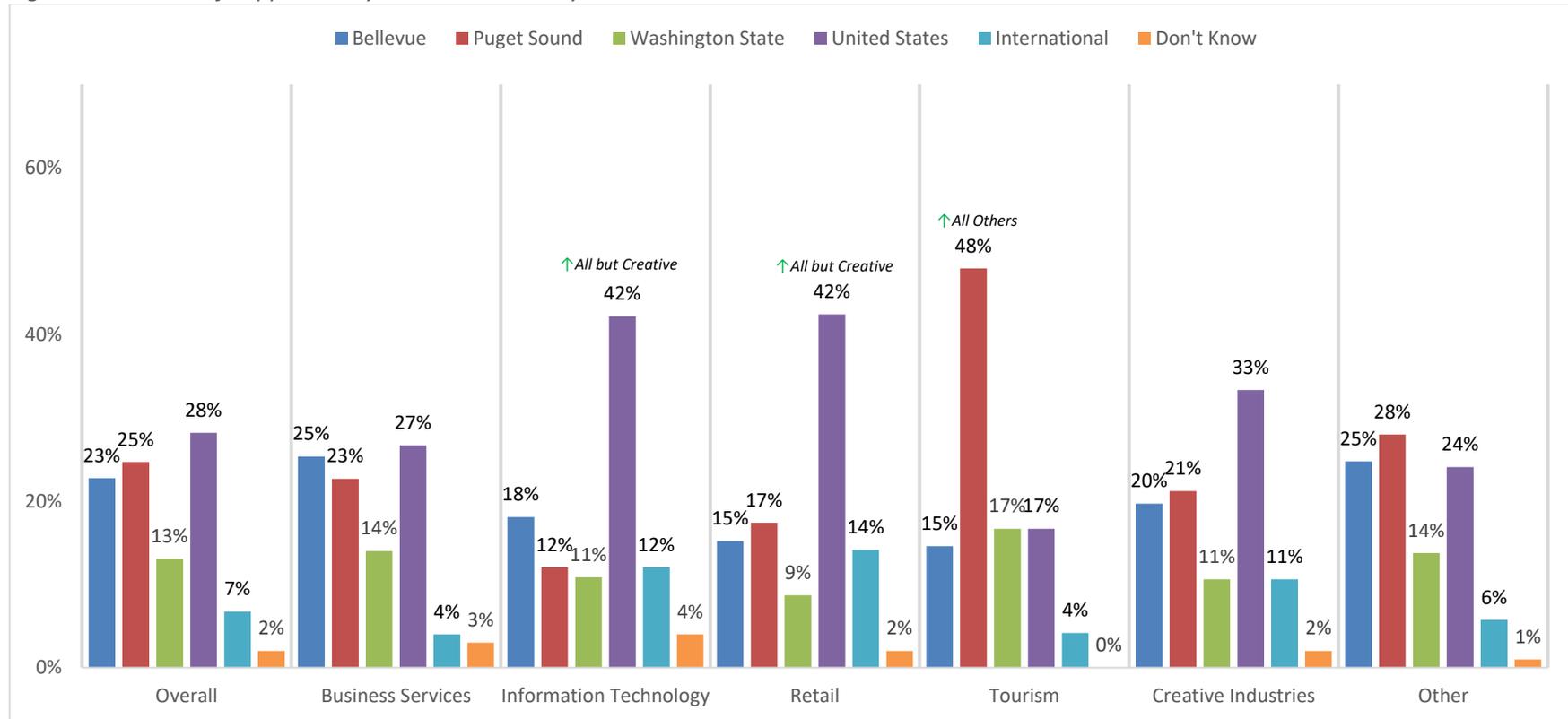
Base: All respondents (n=,1025); Business Services (n=300); IT (n=83); Retail (n=92); Tourism (n=48), Creative Industries (n=66), Other (n=436)

## SUPPLIER LOCATION(S)

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

Retail and IT businesses are significantly more likely than businesses in other sectors to be supplied by businesses across the United States and Tourism businesses are significantly more likely than businesses in other sectors to be supplied by businesses across in the Puget Sound.

Figure 3: Location of Suppliers – By Sector – 2019 Only



ST10— Where are the majority of your suppliers located?

Base: All respondents (n=,1025); Business Services (n=300); IT (n=83); Retail (n=92); Tourism (n=48), Creative Industries (n=66), Other (n=436)

## KEY FINDINGS—OPERATING A BUSINESS IN BELLEVUE

### BELLEVUE AS A PLACE TO OPERATE A BUSINESS

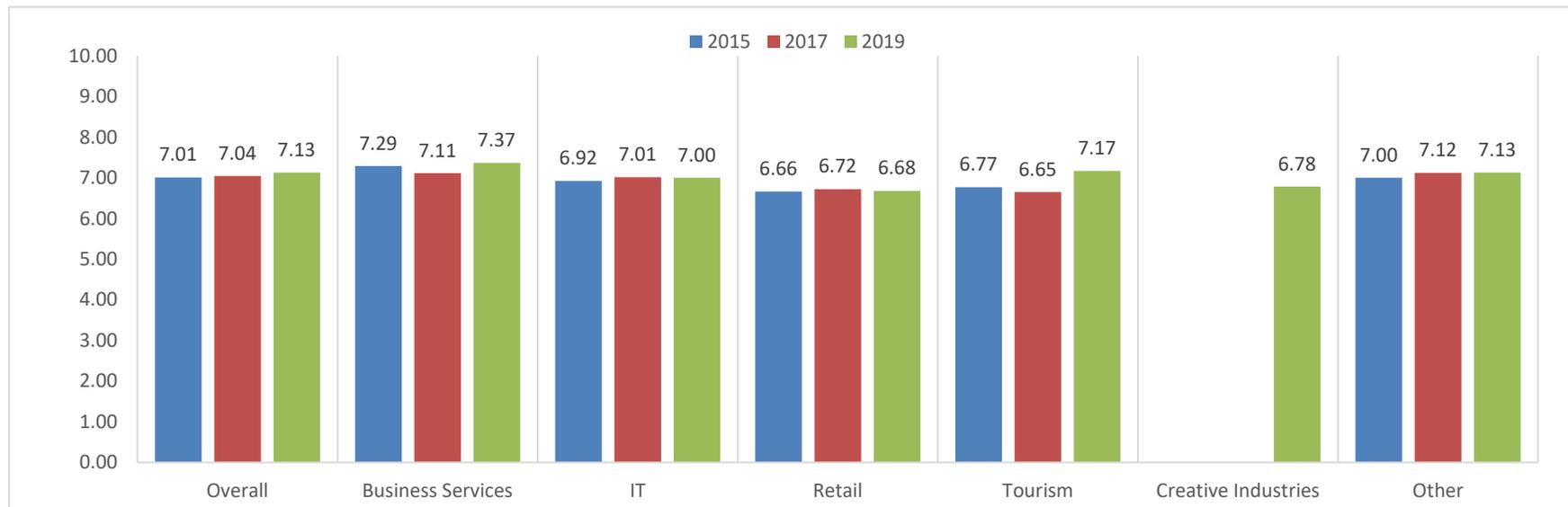
#### All Business / Year-Over-Year

More than three out of four businesses feel that Bellevue is a “somewhat” or “significantly” better place to operate a business compared to other cities—the same as previous years.

	2015	2017	2019
<b>Better Than</b>	74%	74%	77%
<b>Significantly Better</b>	21%	22%	24%
<b>Better</b>	53%	53%	53%
<b>The Same</b>	19%	18%	16%
<b>Worse</b>	7%	7%	8%
<b>Mean</b>	7.01	7.04	7.13

While there are some minor year-over-year variations within sectors, all variations are within the margin of error. Businesses in the Retail sector continue to give the lowest ratings. Currently, 14 percent of retail businesses suggest Bellevue is worse than other cities or towns as a place to operate a business—7 percent say it is significantly worse than other cities.

Figure 4: City of Bellevue as a Place to Operate a Business – Year-Over-Year



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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

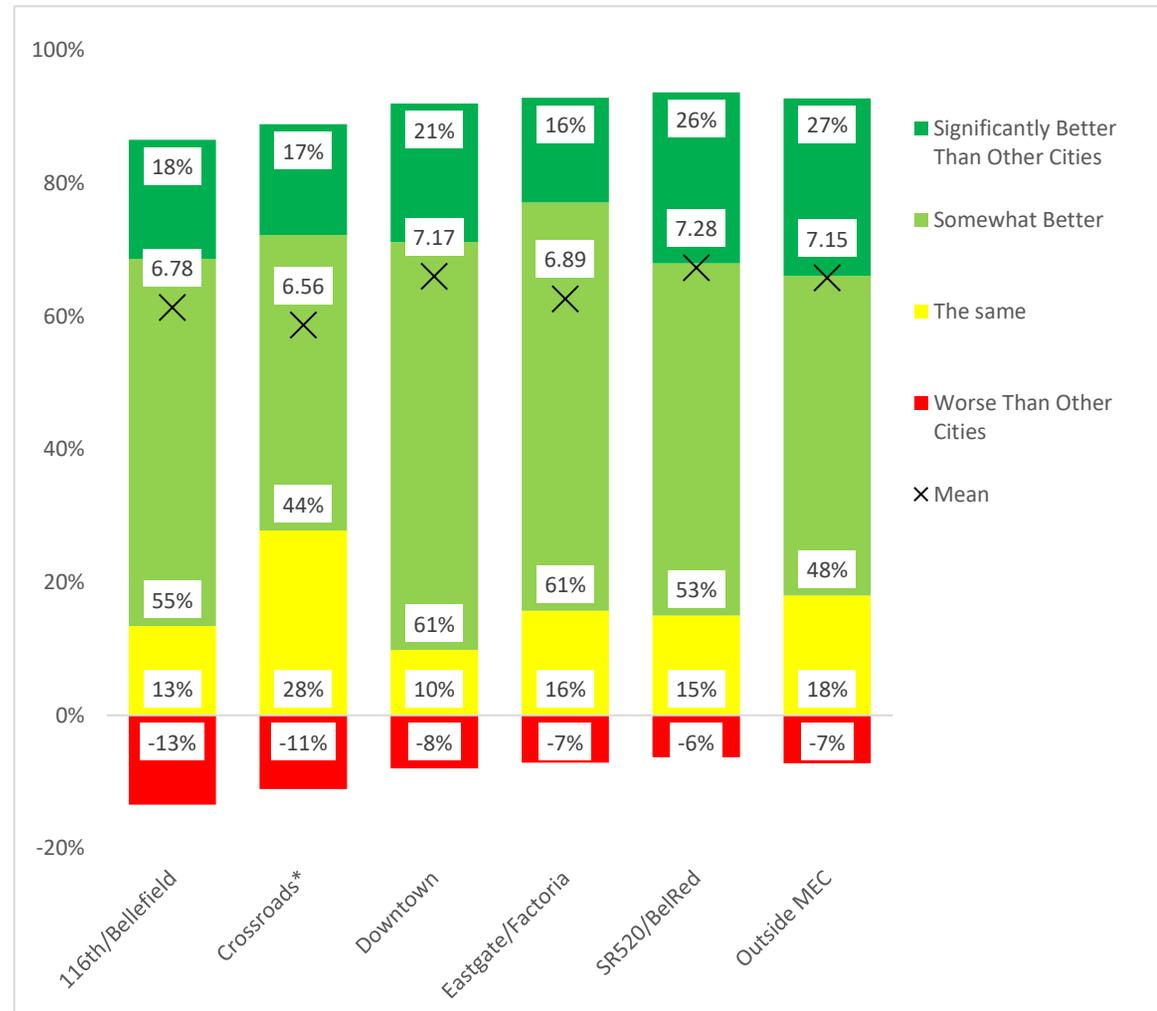
Mean based on 11-point scale where “0” means “significantly worse than other cities and towns” and “10” means “significantly better than other cities and towns.”

### By Location

While there are no significant differences in these ratings based on the location of the business, trended year over year, there is an increase in ratings for Bellevue as a place to operate a business among businesses located in SR-520 / Bel-Red. Notably, there has been a steady increase in the percentage of businesses in this location reporting that Bellevue is a significantly better place to operate a business.

SR520 / BelRed	2015	2017	2019
<b>Better Than</b>	71%	73%	79%
<b>Significantly Better</b>	18%	21%	26%↑
<b>Better</b>	53%	52%	53%
<b>The Same</b>	19%	21%	15%
<b>Worse</b>	10%	6%	6%
<b>Mean</b>	6.77	7.05	7.28↑

Figure 5: City of Bellevue as a Place to Operate a Business – By MEC – 2019 Only



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

Base: All respondents. 116th/Bellefield (n=68); Crossroads (n=20); Downtown (n=168); Eastgate/Factoria (n=72); SR 520/Bel-Red (n=263); Outside MEC (n=434) \*Low base size

Mean based on 11-point scale where "0" means "significantly worse than other cities and towns" and "10" means "significantly better than other cities and towns."

## QUALITY OF SERVICES PROVIDED TO BUSINESSES

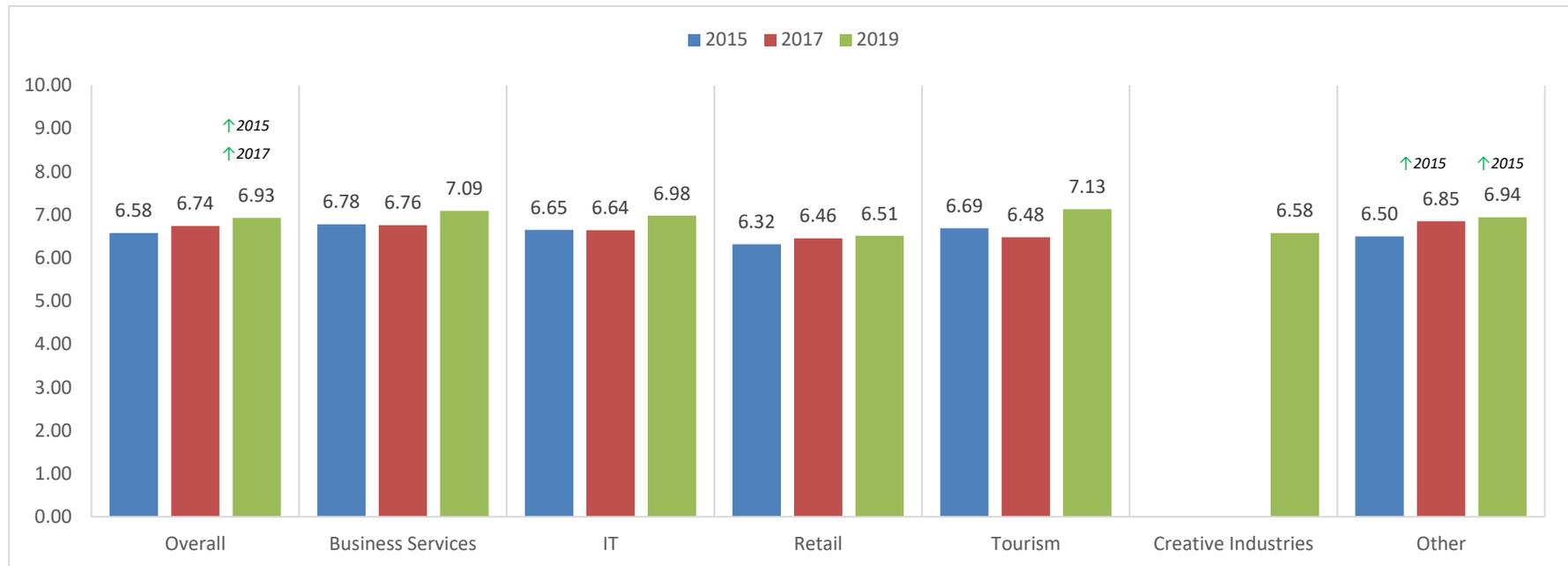
### All Business / Year-Over-Year

Nearly three out four (72%) Bellevue businesses feel that the quality of services provided to businesses by the City “exceeds” or “greatly exceeds” their expectations and they feel that the over quality of services provided to businesses is improving—notably the percentage who feel that the quality of services provided to businesses greatly exceeds their expectations has increased each year.

	2015	2017	2019
<b>Exceeds Expectations</b>	66%	68%	72%↑
<b>Greatly</b>	16%	18%	22%↑
<b>Somewhat</b>	50%	51%	50%
<b>Meets</b>	25%	24%	20%
<b>Does not Meet Expectations</b>	9%	8%	8%
<b>Mean</b>	6.58	6.74	6.93↑

While this increase is seen across all business sectors, the increase is greatest among those in the tourism industry. Currently there are no significant differences in these ratings across the business sectors.

Figure 6: Quality of Services Provided to Businesses – Year-Over-Year



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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where “0” means “does not meet expectations at all” and “10” means “greatly exceeds expectations”

### By Location

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

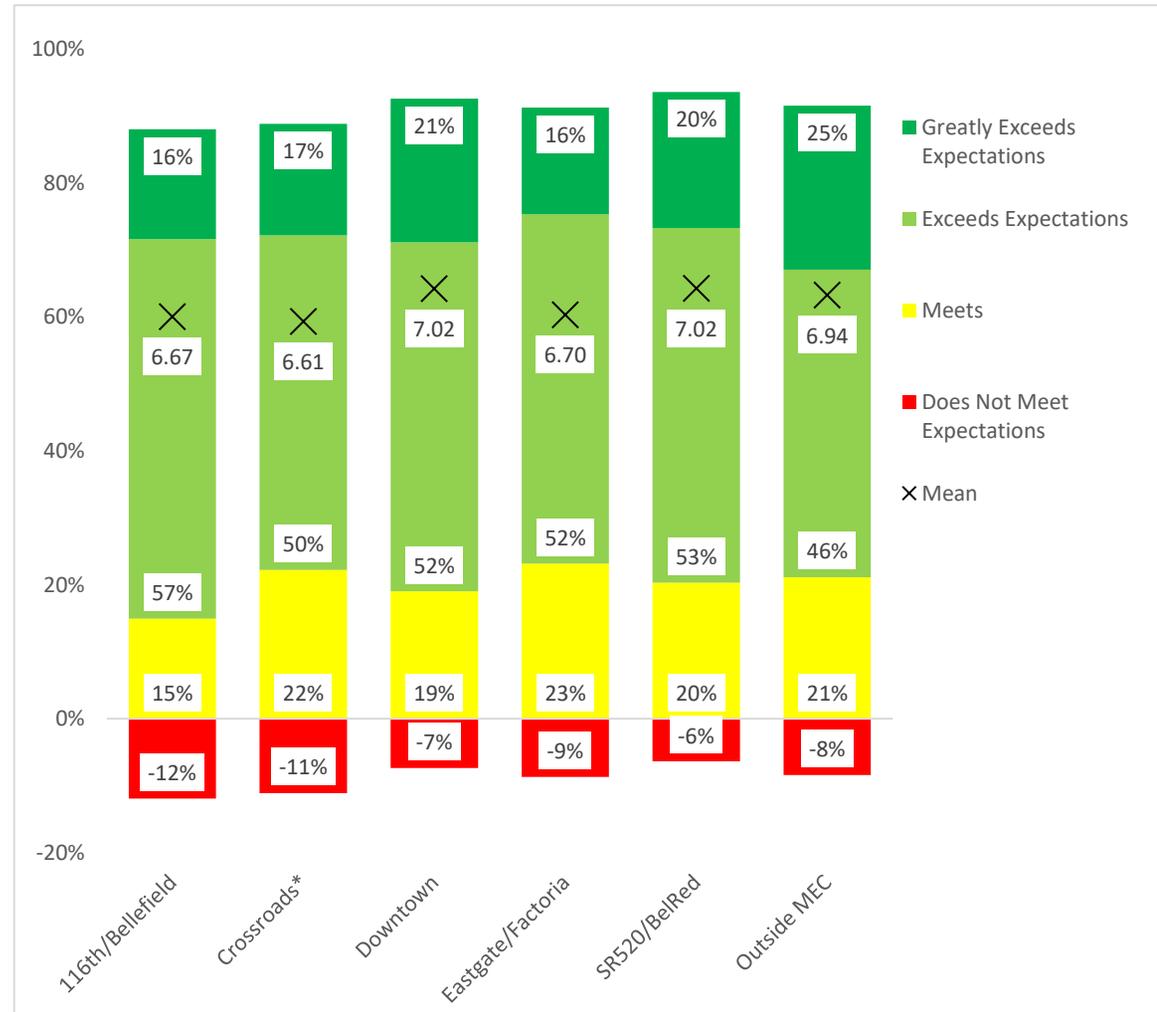
Consistent with the increase in ratings for Bellevue as a place to operate a business, businesses in the SR520 / Bel-Red MEC are increasingly positive about the overall quality of services provided to businesses.

SR520 / BelRed	2015	2017	2019
<b>Exceeds Expectations</b>	63%	69%	73%
<b>Greatly</b>	13%	17%	20%
<b>Somewhat</b>	50%	52%	53%
<b>Meets</b>	24%	24%	20%
<b>Does not Meet</b>	13%	7%	6%
<b>Mean</b>	6.37	6.79↑	7.02↑

Businesses outside any defined MEC have also seen an increase when compared to 2015. This is primarily a result of an increase in those saying the quality of services “greatly” exceeds expectations.

Outside MEC	2015	2017	2019
<b>Exceeds Expectations</b>	62%	66%	70%
<b>Greatly</b>	16%	17%	25%↑
<b>Somewhat</b>	46%	49%	46%
<b>Meets</b>	29%	24%	21%
<b>Does not Meet</b>	9%	9%	8%
<b>Mean</b>	6.52	6.66	6.94↑

Figure 7: Quality of Services Provided to Businesses – By MEC – 2019 Only



BNWRG3— How would you rate the overall quality of services provided to businesses by the City of Bellevue?  
 Base: All respondents. 116th/Bellefield (n=68); Crossroads (n=20); Downtown (n=168); Eastgate/Factoria (n=72); SR 520/Bel-Red (n=263); Outside MEC (n=434) \*Low base size  
 Mean is based on an 11-point scale from 0 to 10 where “0” means “does not meet expectations at all” and “10” means “greatly exceeds expectations”

## DIRECTION BELLEVUE IS HEADED

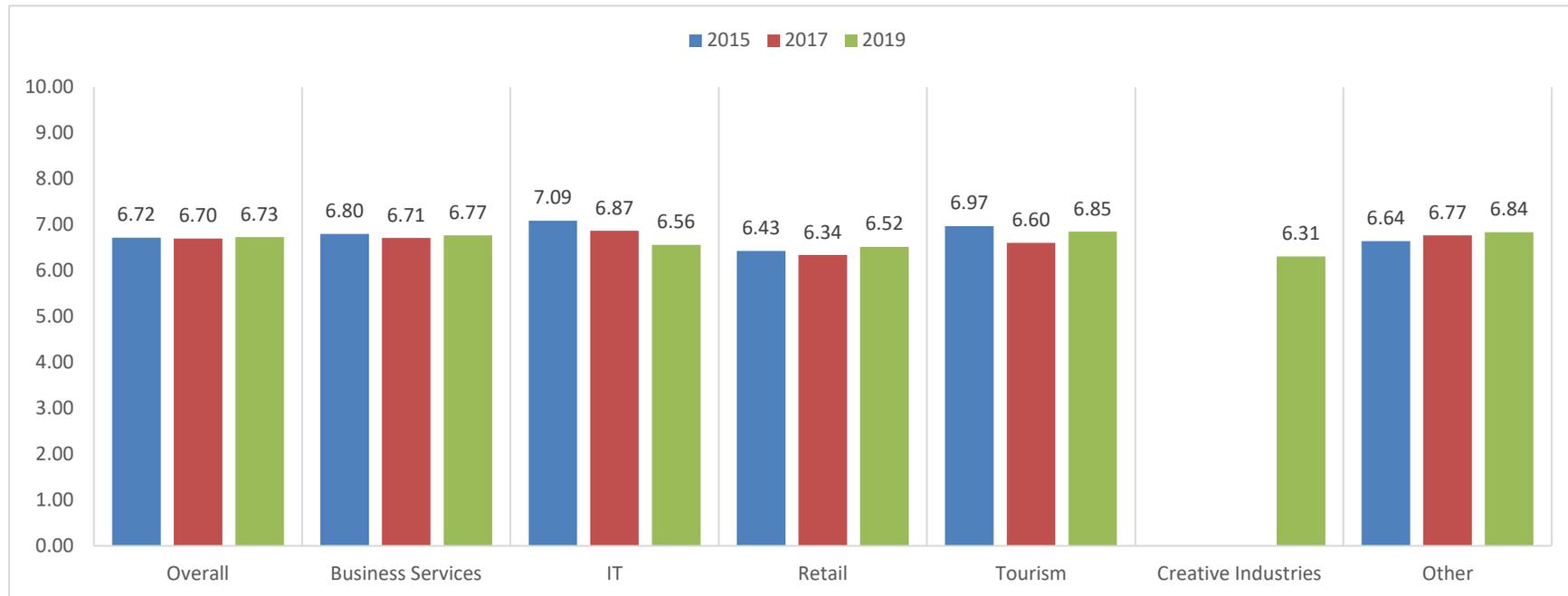
### All Business / Year-Over-Year

Overall, the majority of businesses in Bellevue (64%) feel that the City is headed in the right direction. While statistically this is the same as in previous years, it should be noted that year over year there has been an increase in the percentage suggesting it is headed in the wrong direction.

	2015	2017	2019
<b>Headed in Right Direction</b>	69%	69%	69%
<b>Strongly Right</b>	19%	20%	23%
<b>Somewhat Right</b>	50%	49%	46%
<b>Neither Right nor Wrong</b>	19%	18%	16%
<b>Headed in Wrong Direction</b>	11%	12%	15%
<b>Mean</b>	6.72	6.70	6.73

While there are no significant differences in 2019 between business sectors, the decrease in ratings noted above is evident only in the IT sector.

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



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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where “0” means “strongly headed in the wrong direction” and “10” means “strongly headed in the right direction”

## REASONS FOR MOVING IN THE RIGHT DIRECTION

Respondents were asked an open-ended question to better understand why they thought that Bellevue was moving in the right or wrong direction. The open-end questions were post coded and summarized.

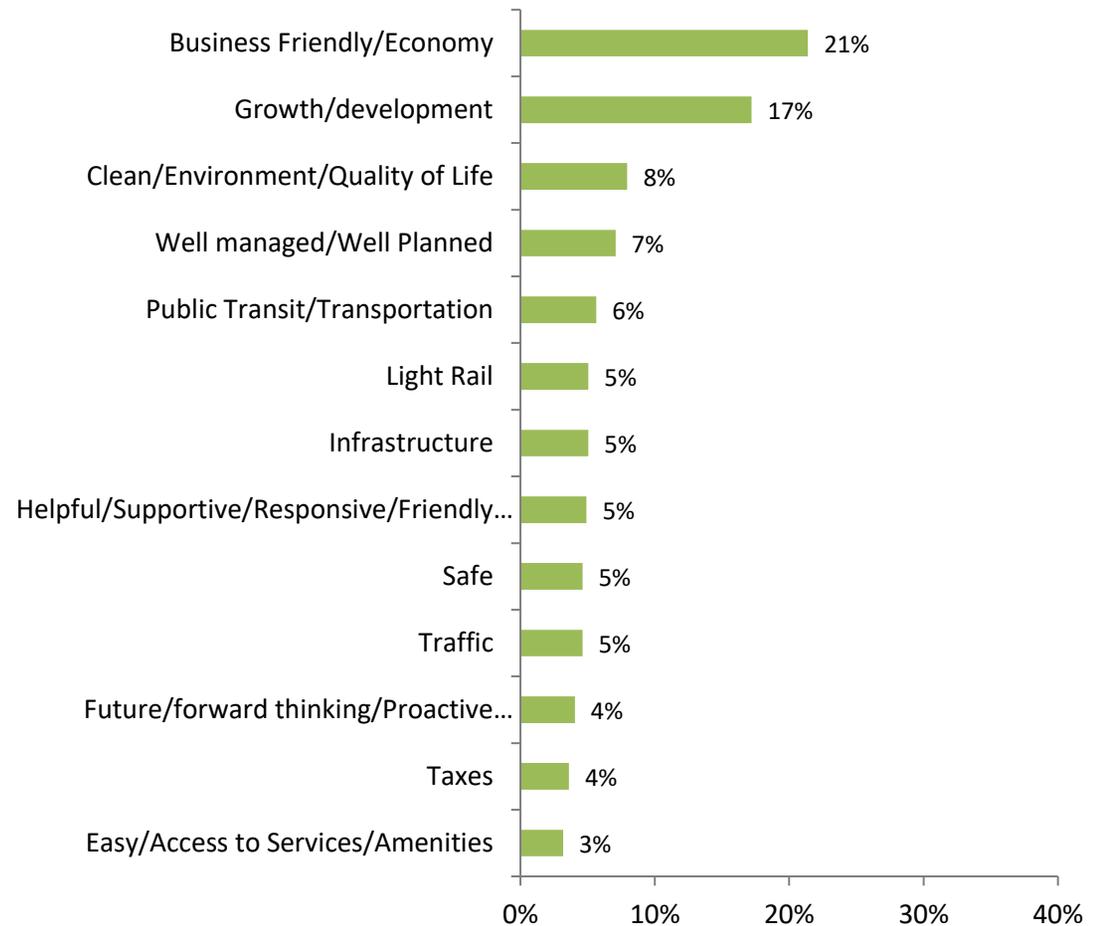
The most commonly mentioned response among those who indicated Bellevue was headed in the right direction is due to the economy and business friendly environment. Businesses also mentioned Bellevue's growth as a positive attribute.

These findings were consistent across all business sectors and demographics.

Sample sizes for individual business sectors, geographies and other business demographics are not large enough to provide viable significance testing; however, the table on the next page provides a breakout of reasons by cluster. Please use caution when interpreting the results.

Full verbatim text is available under a different cover.

Figure 9: Reasons Bellevue is Moving in the Right Direction (n=692)



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=692).

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

**Reasons Bellevue is Headed in the Right Direction by Cluster**

	<b>Overall (n=692)</b>	<b>Business Services (n=204)</b>	<b>Information Technology (n=52)</b>	<b>Retail (n=62)</b>	<b>Tourism (n=31)</b>	<b>Creative Industries (n=40)</b>	<b>Other (n=303)</b>
<b>Business Friendly/Economy</b>	21% (n=148)	22% (n=45)	23% (n=12)	27% (n=17)	26% (n=8)	18% (n=7)	19% (n=59)
<b>Growth/development</b>	17% (n=119)	18% (n=37)	12% (n=6)	16% (n=10)	10% (n=3)	25% (n=10)	17% (n=53)
<b>Clean/Environment/Quality of Life</b>	8% (n=55)	8% (n=16)	15% (n=8)	13% (n=8)	6% (n=2)	10% (n=4)	6% (n=17)
<b>Well managed/Well Planned</b>	7% (n=49)	10% (n=21)	2% (n=1)	6% (n=4)	3% (n=1)	3% (n=1)	7% (n=21)
<b>Public Transit/Transportation</b>	6% (n=39)	9% (n=18)	8% (n=4)	5% (n=3)	0% (n=0)	8% (n=3)	4% (n=11)
<b>Infrastructure</b>	5% (n=35)	5% (n=11)	15% (n=8)	3% (n=2)	6% (n=2)	0% (n=0)	4% (n=12)
<b>Light Rail</b>	5% (n=35)	5% (n=11)	8% (n=4)	5% (n=3)	0% (n=0)	3% (n=1)	5% (n=16)
<b>Helpful / Supportive / Responsive / Friendly/Positive</b>	5% (n=34)	3% (n=6)	8% (n=4)	2% (n=1)	6% (n=2)	5% (n=2)	6% (n=19)
<b>Traffic</b>	5% (n=32)	5% (n=11)	2% (n=1)	6% (n=4)	0% (n=0)	5% (n=2)	5% (n=14)
<b>Safe</b>	5% (n=32)	6% (n=12)	4% (n=2)	6% (n=4)	3% (n=1)	5% (n=2)	4% (n=11)
<b>Future/forward thinking/Proactive Leadership/Progressive</b>	4% (n=28)	5% (n=11)	2% (n=1)	2% (n=1)	3% (n=1)	8% (n=3)	4% (n=11)
<b>Taxes</b>	4% (n=25)	5% (n=10)	6% (n=3)	5% (n=3)	0% (n=0)	0% (n=0)	3% (n=9)
<b>Easy/Access to Services/Amenities</b>	3% (n=22)	4% (n=8)	2% (n=1)	3% (n=2)	3% (n=1)	3% (n=1)	3% (n=9)
<b>Regulations/Red Tape/Bureaucracy</b>	2% (n=11)	1% (n=2)	2% (n=1)	2% (n=1)	13% (n=4)	0% (n=0)	1% (n=3)
<b>Cost/Expensive</b>	1% (n=10)	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=1)	0% (n=0)	3% (n=9)
<b>Unmanaged growth or development/overcrowding</b>	1% (n=8)	1% (n=2)	0% (n=0)	0% (n=0)	3% (n=1)	3% (n=1)	1% (n=4)
<b>Location/Convenient</b>	1% (n=7)	1% (n=2)	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=1)	1% (n=4)
<b>Unfriendly to small/local business</b>	1% (n=5)	0% (n=0)	2% (n=1)	2% (n=1)	0% (n=0)	5% (n=2)	0% (n=1)
<b>Variety/Diversity</b>	1% (n=5)	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=1)	0% (n=0)	1% (n=4)
<b>Parking issues</b>	1% (n=4)	0% (n=1)	6% (n=3)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Tech Industry</b>	1% (n=4)	0% (n=1)	2% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	1% (n=2)
<b>Not helpful</b>	0% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=1)
<b>Density</b>	0% (n=1)	0% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Unaware of services provided by City</b>	0% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=1)
<b>Traditional/Old</b>	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Other</b>	16% (n=114)	16% (n=33)	19% (n=10)	23% (n=14)	13% (n=4)	13% (n=5)	16% (n=48)



[Blank page inserted for pagination purposes.]

## REASONS FOR MOVING IN THE WRONG DIRECTION

Only 31 percent of businesses ( $n=307$ ) felt that Bellevue was moving in the wrong direction (answer of 5 or less on a scale from 0 to 10).

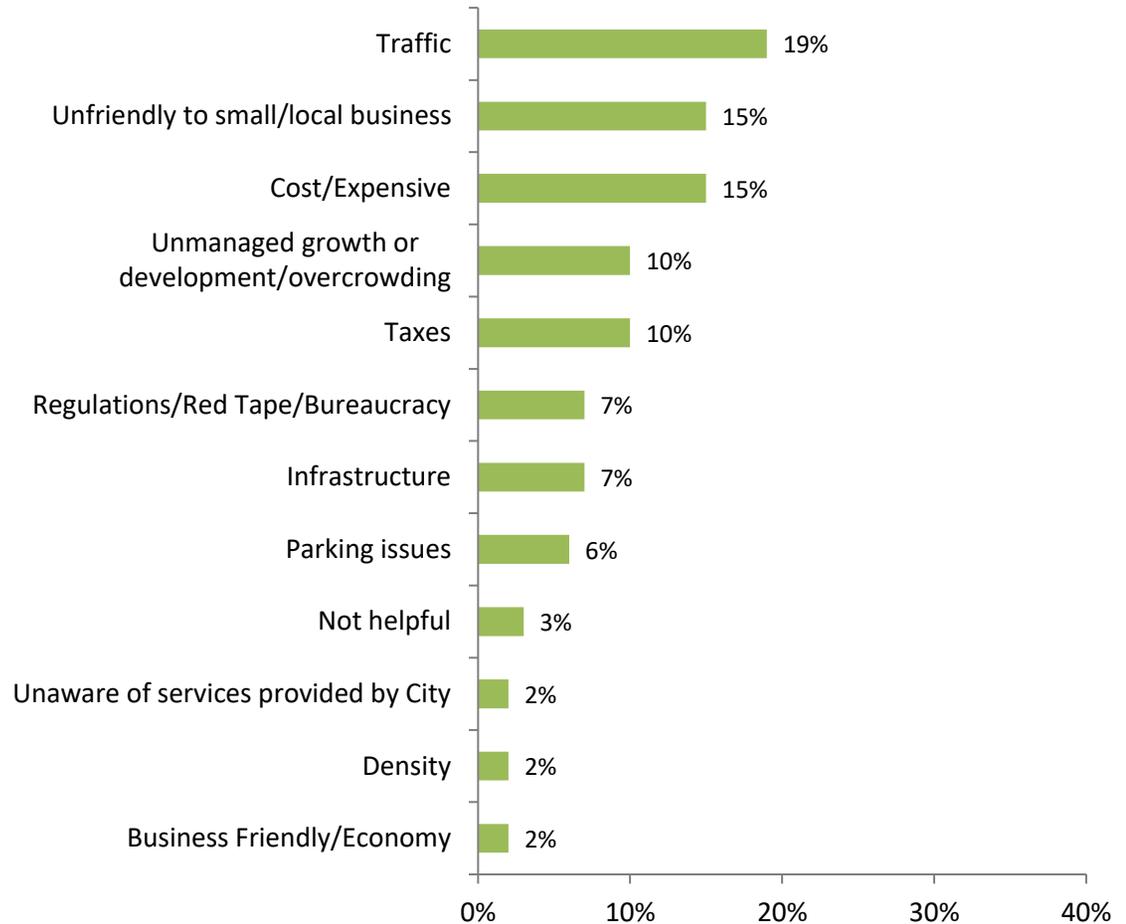
Traffic, an unfriendly feeling toward small/local businesses, and the cost of doing business in Bellevue are the top mentioned reasons businesses feel that Bellevue is not moving in the right direction.

This is followed by unmanaged growth and taxes.

Sample sizes for individual business sectors, geographies and other business demographics are not large enough to provide viable significance testing; however, the table on the next page provides a breakout of reasons by cluster. Please use caution when interpreting the results.

Full verbatim text is available under a different cover.

Figure 10: Reasons Bellevue is Moving in the Wrong Direction ( $n=307$ )



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 ( $n=307$ ).

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

**Reasons Bellevue is **NOT** Headed in the Right Direction by Cluster**

	<b>Overall (n=307)</b>	<b>Business Services (n=94)</b>	<b>Information Technology (n=29)</b>	<b>Retail (n=27)</b>	<b>Tourism (n=15)</b>	<b>Creative Industries (n=24)</b>	<b>Other (n=118)</b>
<b>Traffic</b>	19% (n=57)	23% (n=22)	17% (n=5)	19% (n=5)	7% (n=1)	8% (n=2)	19% (n=22)
<b>Cost/Expensive</b>	15% (n=46)	16% (n=15)	17% (n=5)	19% (n=5)	13% (n=2)	13% (n=3)	14% (n=16)
<b>Unfriendly to small/local business</b>	15% (n=46)	10% (n=9)	10% (n=3)	19% (n=5)	13% (n=2)	25% (n=6)	18% (n=21)
<b>Taxes</b>	10% (n=32)	9% (n=8)	14% (n=4)	15% (n=4)	20% (n=3)	8% (n=2)	9% (n=11)
<b>Unmanaged growth or development/overcrowding</b>	10% (n=32)	14% (n=13)	3% (n=1)	15% (n=4)	0% (n=0)	8% (n=2)	10% (n=12)
<b>Infrastructure</b>	7% (n=20)	7% (n=7)	10% (n=3)	7% (n=2)	0% (n=0)	4% (n=1)	6% (n=7)
<b>Regulations/Red Tape/Bureaucracy</b>	7% (n=23)	5% (n=5)	3% (n=1)	22% (n=6)	7% (n=1)	4% (n=1)	8% (n=9)
<b>Parking issues</b>	6% (n=19)	6% (n=6)	7% (n=2)	7% (n=2)	0% (n=0)	8% (n=2)	6% (n=7)
<b>Not helpful</b>	3% (n=9)	2% (n=2)	0% (n=0)	11% (n=3)	0% (n=0)	4% (n=1)	3% (n=3)
<b>Business Friendly/Economy</b>	2% (n=5)	2% (n=2)	0% (n=0)	4% (n=1)	0% (n=0)	0% (n=0)	2% (n=2)
<b>Density</b>	2% (n=6)	3% (n=3)	3% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	2% (n=2)
<b>Unaware of services provided by City</b>	2% (n=5)	0% (n=0)	3% (n=1)	4% (n=1)	0% (n=0)	4% (n=1)	2% (n=2)
<b>Growth/development</b>	1% (n=2)	0% (n=0)	3% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	1% (n=1)
<b>Clean/Environment/Quality of Life</b>	1% (n=3)	2% (n=2)	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=1)	0% (n=0)
<b>Well managed/Well Planned</b>	1% (n=3)	1% (n=1)	7% (n=2)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Public Transit/Transportation</b>	1% (n=3)	2% (n=2)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	1% (n=1)
<b>Light Rail</b>	1% (n=2)	0% (n=0)	3% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	1% (n=1)
<b>Helpful / Supportive / Responsive / Friendly / Positive</b>	1% (n=2)	1% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	4% (n=1)	0% (n=0)
<b>Future/forward thinking/Proactive Leadership/Progressive</b>	1% (n=4)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	3% (n=4)
<b>Location/Convenient</b>	1% (n=2)	1% (n=1)	3% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Safe</b>	0% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	7% (n=1)	0% (n=0)	0% (n=0)
<b>Easy/Access to Services/Amenities</b>	0% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	1% (n=1)
<b>Variety/Diversity</b>	0% (n=1)	1% (n=1)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Tech Industry</b>	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Traditional/Old</b>	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)	0% (n=0)
<b>Other</b>	27% (n=83)	34% (n=32)	24% (n=7)	15% (n=4)	47% (n=7)	21% (n=5)	24% (n=28)



## VALUE FOR TAX DOLLAR

### All Business / Year-Over-Year

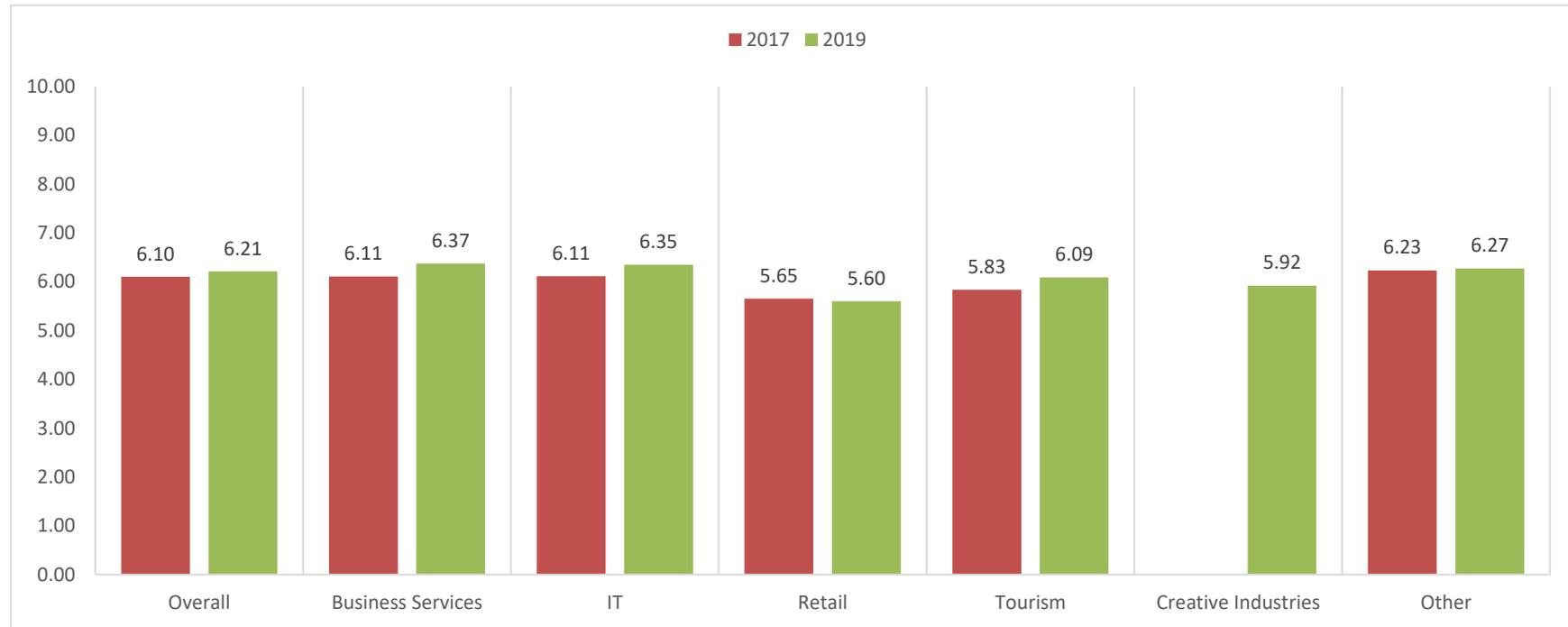
Overall, three out of five businesses feel that they are getting good to excellent value for their tax dollar paid.

There are no significant differences between 2017 and 2019. (Note question text changed after 2015 so comparisons cannot be made.)

	2015	2017	2019
Receive Value	Question Text Not the Same	59%	61%
Excellent Value		13%	14%
Good Value		46%	56%
Neutral		25%	22%
Poor Value		17%	17%
Mean		6.10	6.21

There are no significant differences in the perceptions of value of services compared to taxes paid across the different business sectors.

Figure 11: Value Received for Money – Year-Over-Year



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

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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where "0" means "very poor value" and "10" means "excellent value."

**By Sector**

There are some differences by business sector. While not statistically significant, a greater percentage of those in the retail business are more likely to say they are getting a poor value. Those in the creative industries segment (new in 2019) are significantly more likely to have a neutral opinion.

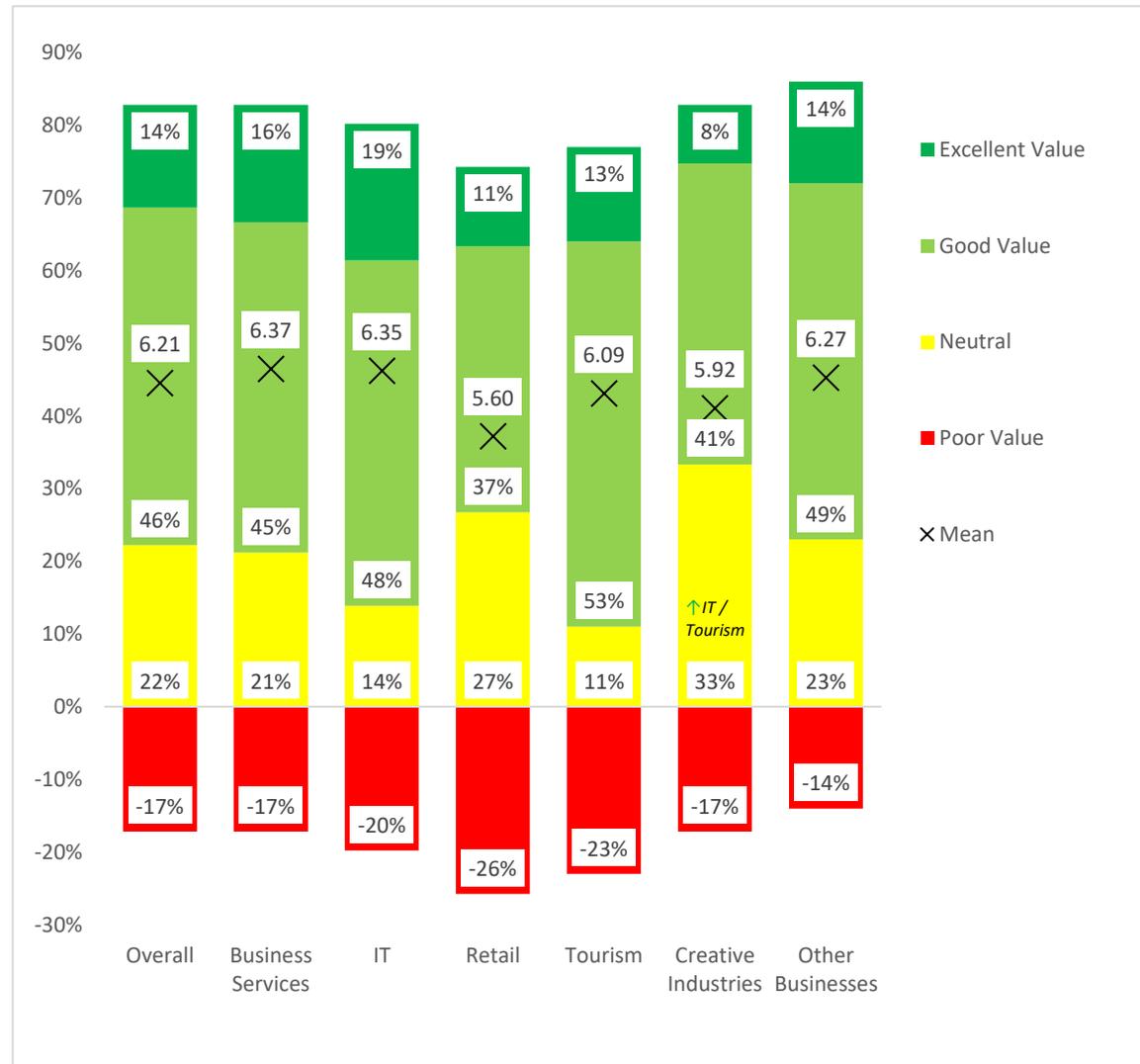
**By Size**

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

**By Business Age**

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

Figure 12: Value Received for Money – By Sector – 2019 Only

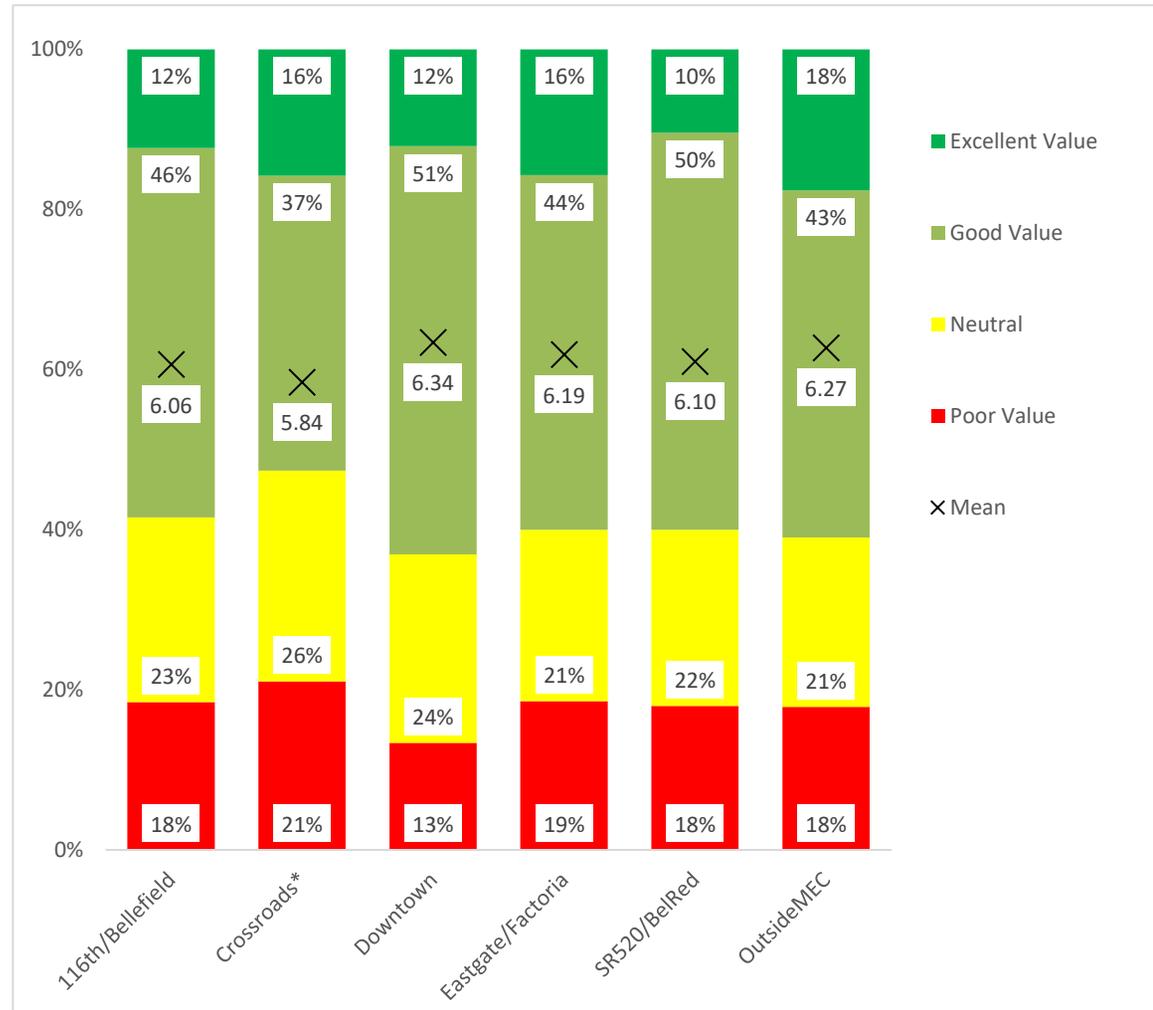


BNWRG6— Think about the taxes you pay in Bellevue and the services you receive from the City. What value do you feel you receive for your money?  
 Base: All respondents (n=,1025); Business Services (n=300); IT (n=83); Retail (n=92); Tourism (n=48), Creative Industries (n=66), Other (n=436)  
 Mean is based on an 11-point scale from 0 to 10

**By Location**

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

Figure 13: Value Received for Money – By MEC – 2019 Only



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

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

Base: All respondents. 116th/Bellefield (n=68); Crossroads (n=20); Downtown (n=168); Eastgate/Factoria (n=72); SR 520/Bel-Red (n=263); Outside MEC (n=434) \*Low base size

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

[Blank page inserted for pagination purposes.]

## COMPARISON TO RESIDENTIAL SURVEY

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

While comparisons between these two groups are for illustrative purposes only, we see that Bellevue residents are more positive than businesses for each of the four questions.

Figure 14: Comparison of Bellevue Businesses to Bellevue Residents



BNWRG / NWRG—Series questions are similar questions asked of businesses in this study and of residents in the 2015 Bellevue Performance Measures survey  
 Comparison for illustrative purposes only. No statistical comparisons performed between groups.  
 Base Businesses: All respondents (n=994) Base Residents: All respondents (n=511)  
 Mean is based on an 11-point scale from 0 to 10

[Blank page inserted for pagination purposes.]

## MOST IMPORTANT BUSINESS-RELATED ISSUE FACING BELLEVUE

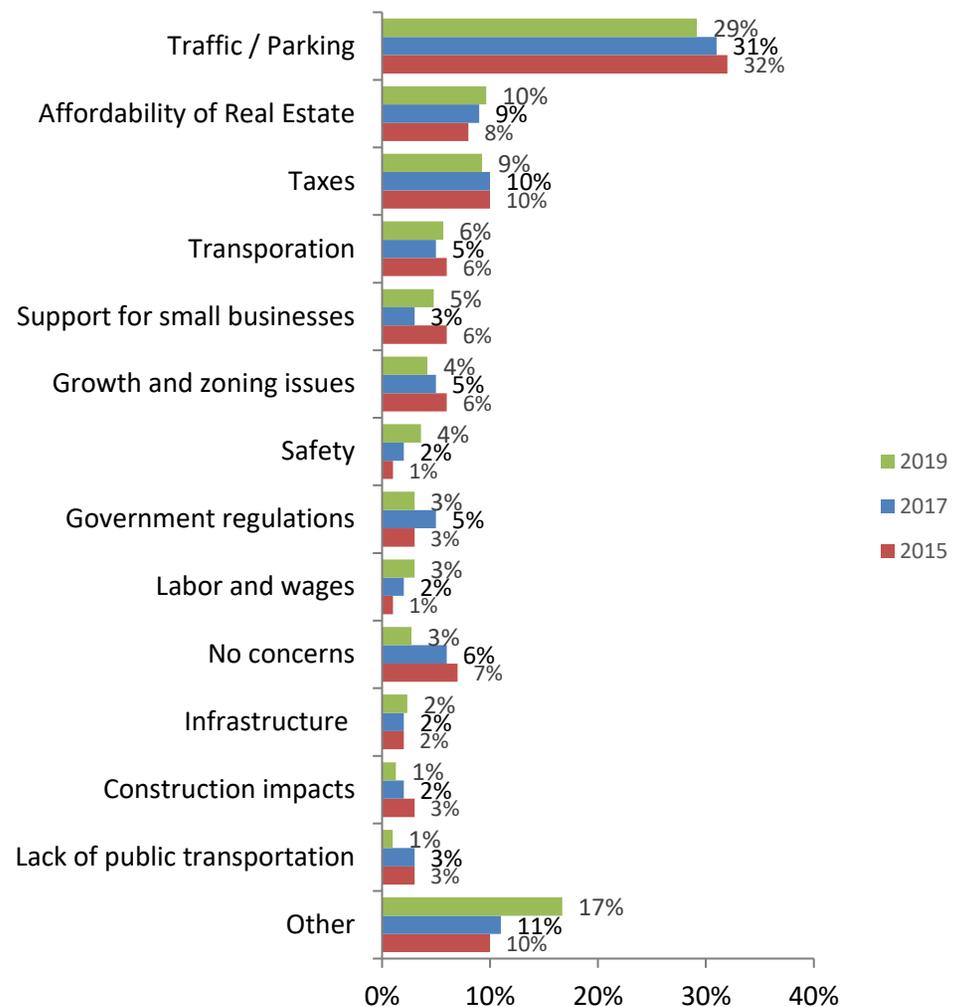
Businesses were asked an open-ended question to determine what they believe is the biggest problem facing Bellevue in the next two years.

Traffic-related issues continue to be the most often mentioned response, receiving nearly three times as many mentions as any other individual response. While “traffic” has been decreasing over the years, the changes are all within the margin of error.

Traffic is the most mentioned response across all geographic areas and business demographics.

Full verbatim responses grouped by business sector can be found in a separate document.

Figure 15: Biggest Problems Facing Bellevue – Year-Over-Year



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

Base: All respondents (2015=917; 2017=994, 2019=1,025).

**Most Important Business-Related Issue Facing Bellevue by Cluster**

	<b>Overall (n=1,025)</b>	<b>Business Services (n=300)</b>	<b>Information Technology (n=83)</b>	<b>Retail (n=92)</b>	<b>Tourism (n=48)</b>	<b>Creative Industries (n=66)</b>	<b>Other (n=436)</b>
Traffic + Parking	29% (n=299)	37% (n=111)	17% (n=14)	26% (n=24)	17% (n=8)	23% (n=15)	29% (n=127)
Affordability of real estate	10% (n=99)	10% (n=29)	11% (n=9)	15% (n=14)	2% (n=1)	8% (n=5)	9% (n=41)
Taxes	9% (n=95)	9% (n=28)	10% (n=8)	10% (n=9)	10% (n=5)	8% (n=5)	9% (n=40)
Public transportation	6% (n=58)	9% (n=26)	2% (n=2)	8% (n=7)	2% (n=1)	8% (n=5)	4% (n=17)
Support for small businesses	5% (n=49)	3% (n=10)	6% (n=5)	10% (n=9)	4% (n=2)	6% (n=4)	4% (n=19)
Growth and zoning issues	4% (n=43)	2% (n=7)	8% (n=7)	1% (n=1)	8% (n=4)	9% (n=6)	4% (n=18)
Safety	4% (n=37)	5% (n=14)	1% (n=1)	5% (n=5)	8% (n=4)	2% (n=1)	3% (n=12)
Labor and wages	3% (n=34)	4% (n=11)	4% (n=3)	2% (n=2)	8% (n=4)	3% (n=2)	3% (n=12)
Government regulations	3% (n=31)	3% (n=8)	5% (n=4)	2% (n=2)	8% (n=4)	2% (n=1)	3% (n=12)
Homelessness	3% (n=28)	2% (n=7)	0% (n=0)	3% (n=3)	4% (n=2)	0% (n=0)	4% (n=16)
Nothing	3% (n=28)	2% (n=7)	0% (n=0)	4% (n=4)	2% (n=1)	5% (n=3)	3% (n=13)
Infrastructure building and maintenance	2% (n=24)	3% (n=8)	6% (n=5)	3% (n=3)	0% (n=0)	2% (n=1)	2% (n=7)
Construction impacting my business	1% (n=13)	0% (n=1)	0% (n=0)	0% (n=0)	2% (n=1)	2% (n=1)	2% (n=10)
Lack of public transportation	1% (n=10)	2% (n=5)	1% (n=1)	1% (n=1)	0% (n=0)	2% (n=1)	0% (n=2)
Other	17% (n=171)	15% (n=45)	29% (n=24)	14% (n=13)	17% (n=8)	20% (n=13)	16% (n=68)

## LIKELIHOOD TO RECOMMEND STARTING A BUSINESS IN BELLEVUE

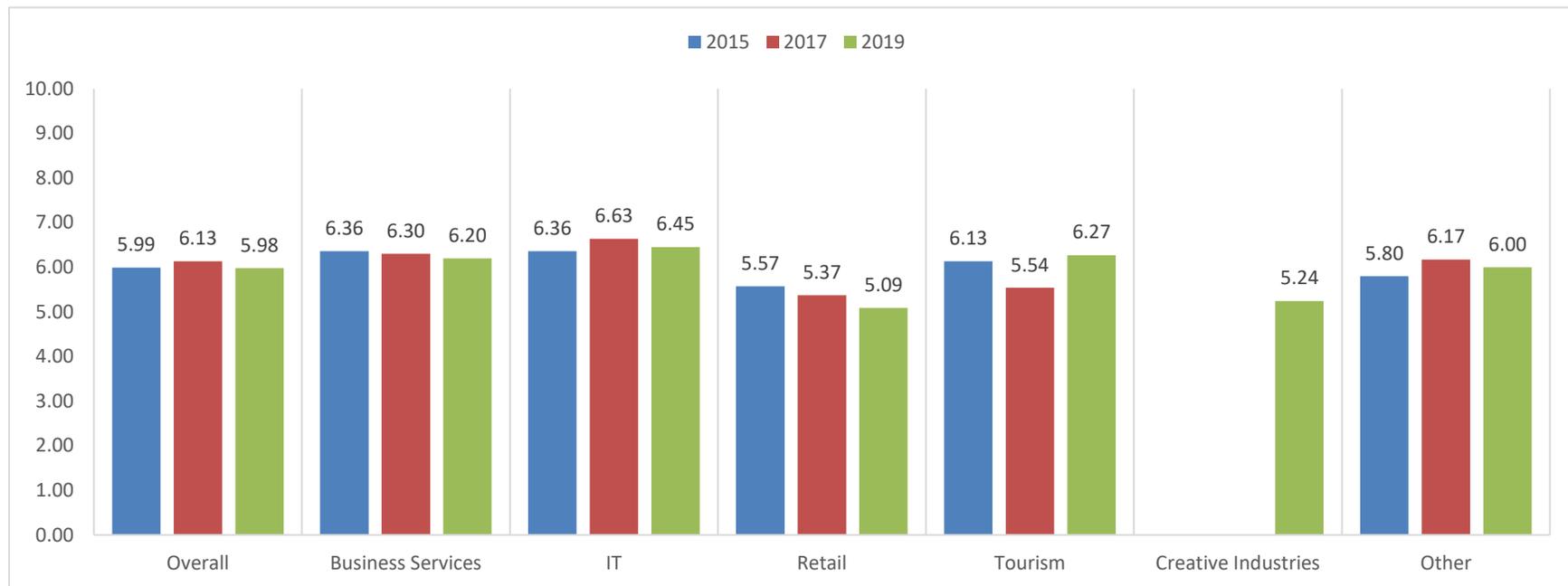
### All Business / Year-Over-Year

Similar to previous years, three out of five businesses are likely to recommend starting a business in Bellevue.

	2015	2017	2019
<b>Likely to Recommend</b>	57%	60%	58%
<b>Extremely Likely</b>	13%	14%	15%
<b>Likely</b>	44%	46%	44%
<b>Neutral</b>	25%	22%	21%
<b>Not Likely</b>	18%	18%	20%
<b>Mean</b>	5.99	6.13	5.98

Ratings have remained consistent year over year across all sectors. Retail businesses are the least likely to say they would recommend doing business in Bellevue. Moreover, recommend rates among Retail businesses has decreased year over year. While this difference is not statistically significant, reasons behind this decrease should be evaluated and monitored. Recommend rates among Business Services have also declined with the percentage not likely to recommend increasing significantly in 2019. As with Retail, reasons behind this decrease should be explored.

Figure 16: Likelihood of Recommending Starting a Business in Bellevue – Year-Over-Year



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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where “0” means “not at all likely” and “10” means “extremely likely” to recommend

[Blank page inserted for pagination purposes.]

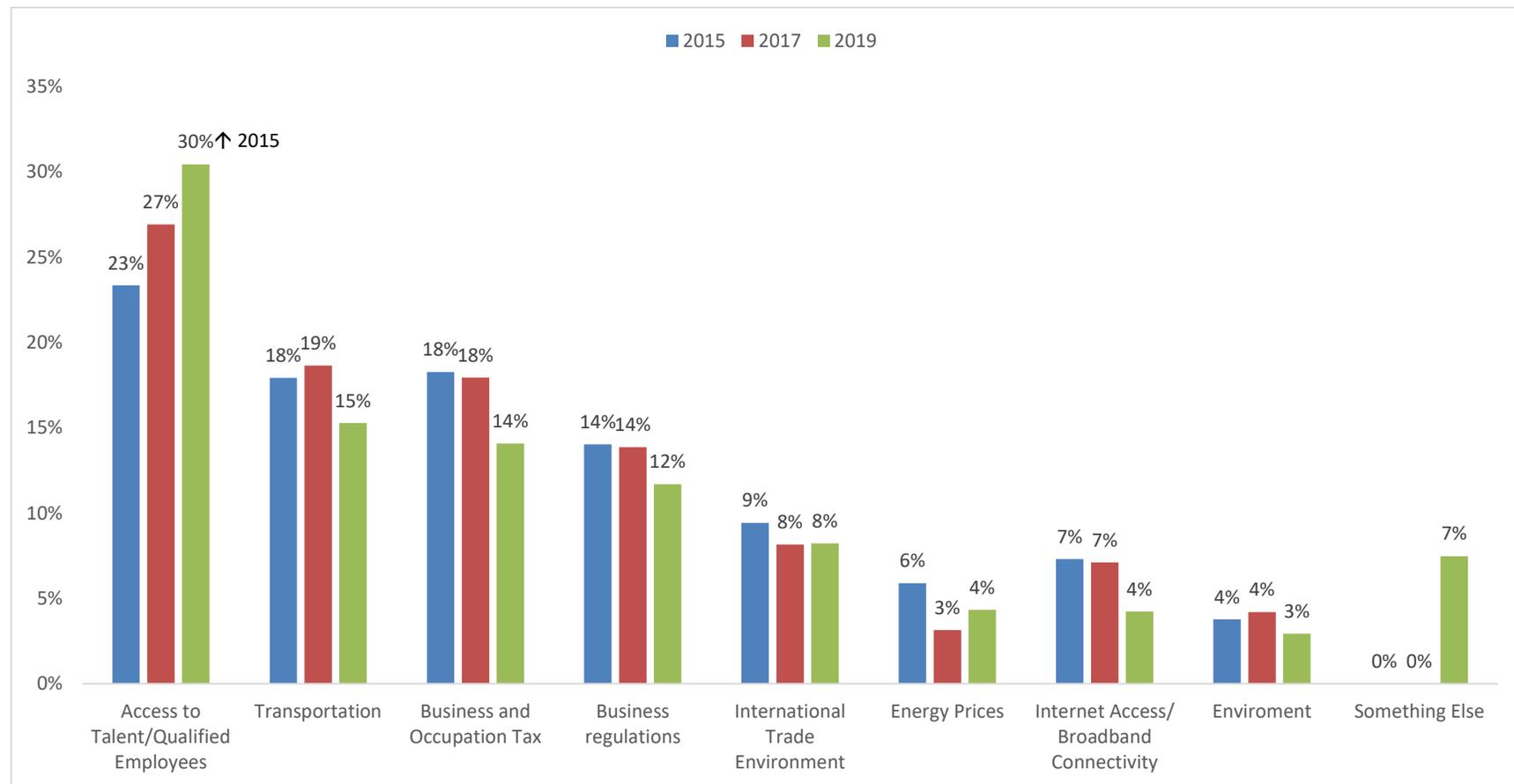
## FACTORS WITH THE BIGGEST FUTURE IMPACT ON BUSINESSES

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.

Access to talent or qualified employees is by far the largest factor that will impact businesses in the future and the impact of this factor is increasing.

More businesses in 2019 reported something other than the list of factors provided. These responses focused largely on general economic concerns and facility costs.

Figure 17: Factor with the Biggest Impact on Businesses



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

## All Businesses

A follow-up question was asked to determine if the factor identified as having the biggest would have a positive or negative impact on their business.

While it is clear that businesses feel access to qualified employees will be the biggest issue, the nature of the impact is somewhat divided between those feeling it will have a positive versus negative impact. Since 2017 more have felt it will have a negative as opposed to positive impact.

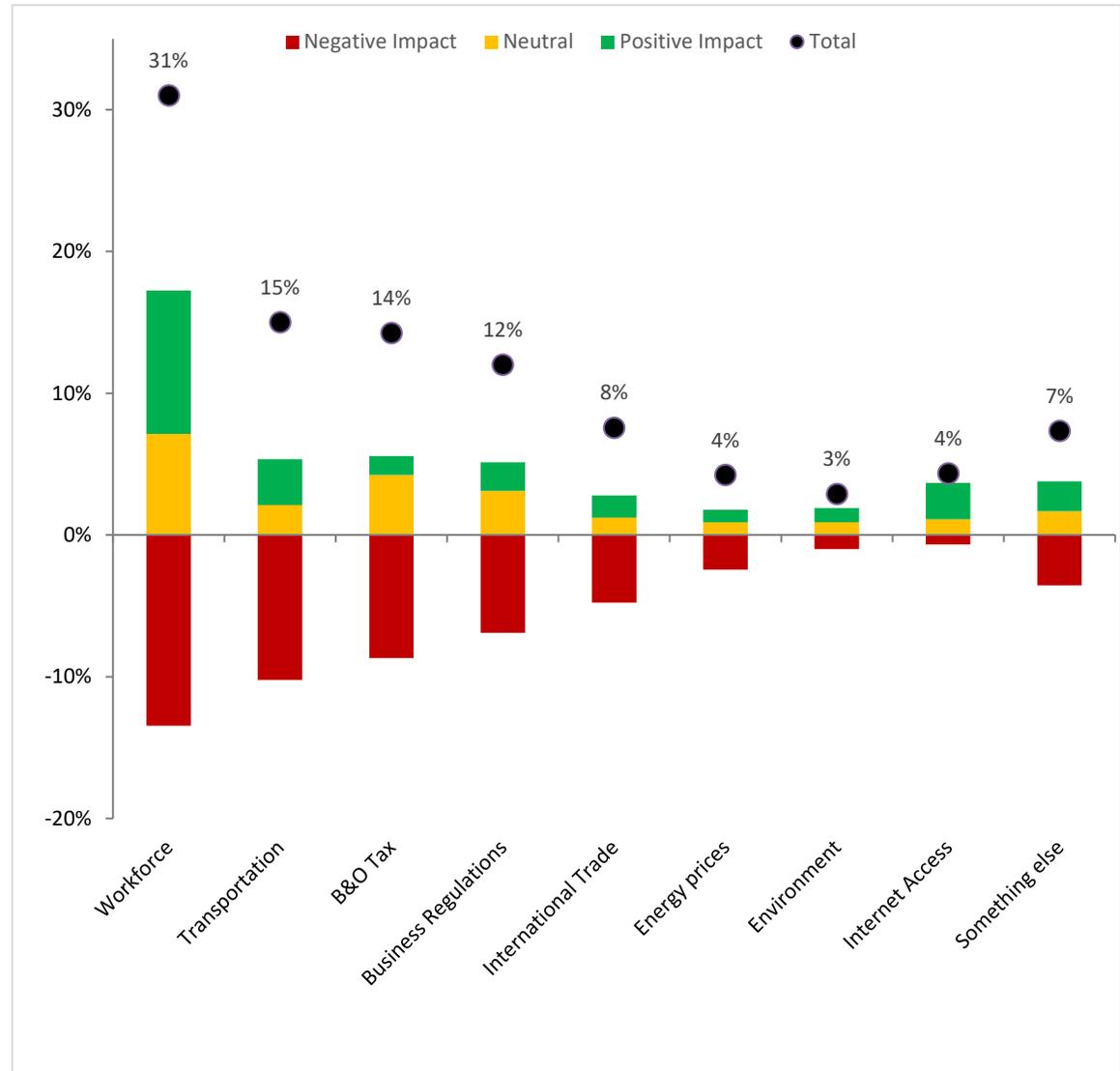
Access to Talent / Qualified Employees			
	2015	2017	2019
Positive Impact	47%	35%↓	33%
Neutral	19%	20%	23%
Negative Impact	34%	44%↑	44%

Transportation is the second most mentioned factor, and the majority all businesses who mentioned transportation indicated that it would have a negative impact. The extent to which transportation is seen as a negative impact has decreased.

Transportation			
	2015	2017	2019
Positive Impact	12%	19%	21%
Neutral	6%	4%	13%
Negative Impact	82%	77%	65%↓

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 indicate the impact will be neither positive nor negative.

Figure 18: Factors with the Biggest Impact – 2019 Only



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

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

Base: All respondents (n=994)

## By Sector

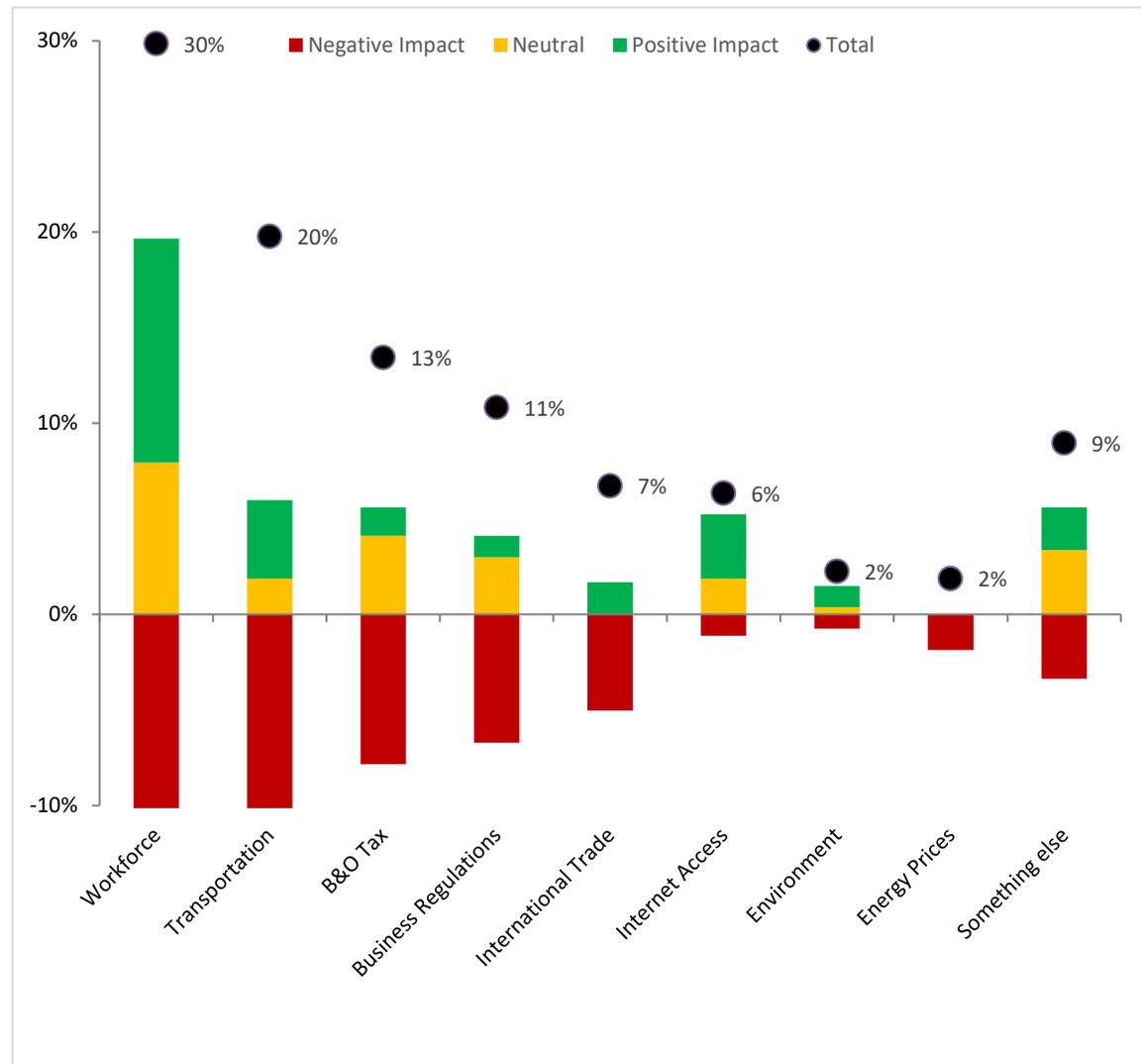
### Business Services

Business Services list the same four factors—Workforce, Transportation, B&O Taxes, and Business Regulation—as the top factors that are likely to affect their businesses in the future.

A greater percentage of Business Services stated that transportation will have the greatest future impact than any other sector. And, a clear majority of Business Services companies feel that Transportation will have a negative impact.

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

Figure 19: Factors with the Biggest Impact – Business Services – 2019 Only



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

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

Base: Business Services (n=268)

## Information Technology

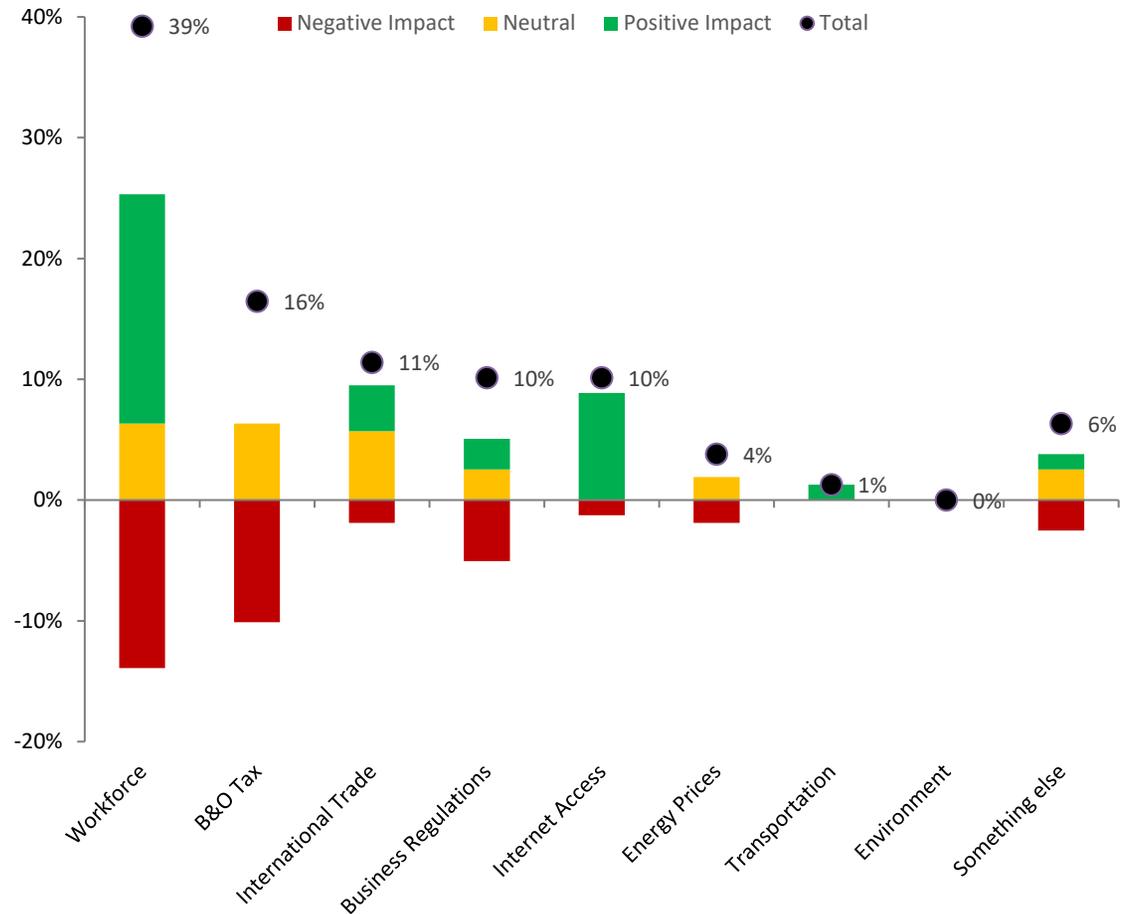
Access to talent or a qualified work force is by far the top mentioned factor for Information Technology businesses. Mentions of the workforce are significantly higher among IT than most other business sectors (the exception is the Tourism sector). Most of Information Technology businesses feel that the workforce will positively affect their business.

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

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

A higher percentage of those in the Information Technology sector than other sectors (other than Creative Industries) indicated that Internet Access / Broadband connectivity would have an impact on their businesses in the future.

Figure 20: Factors with the Biggest Impact – Information Technology – 2019 Only



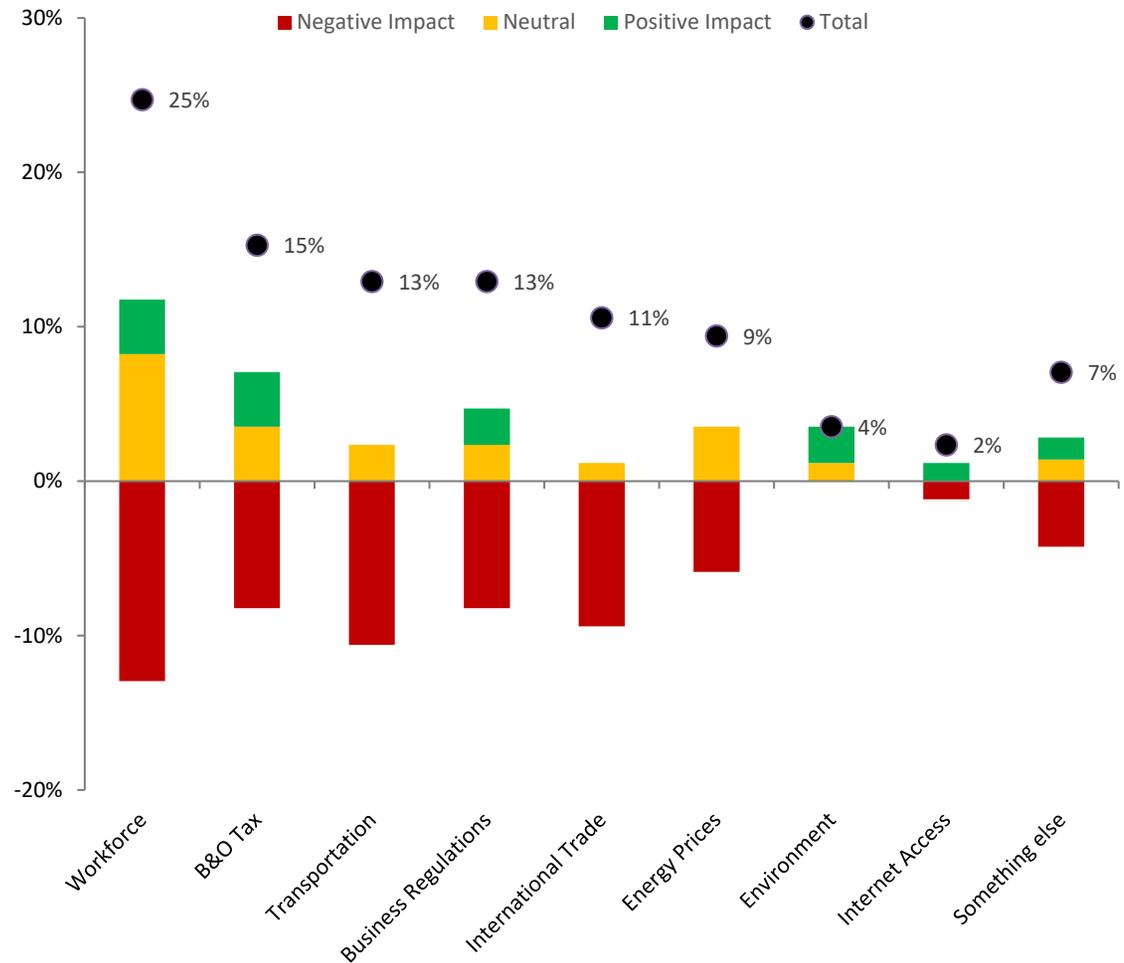
ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .  
 Base: Information Technology (n=79)

## Retail

Workforce is the factor mentioned most often as having the largest impact to Retail businesses, with the majority of these businesses fearing a negative impact.

Business regulations and B&O taxes both receive thirteen percent of mentions, and retail businesses indicate these will primarily have a negative impact these on their business in the coming years.

Figure 21: Factors with the Biggest Impact – Retail – 2019 Only



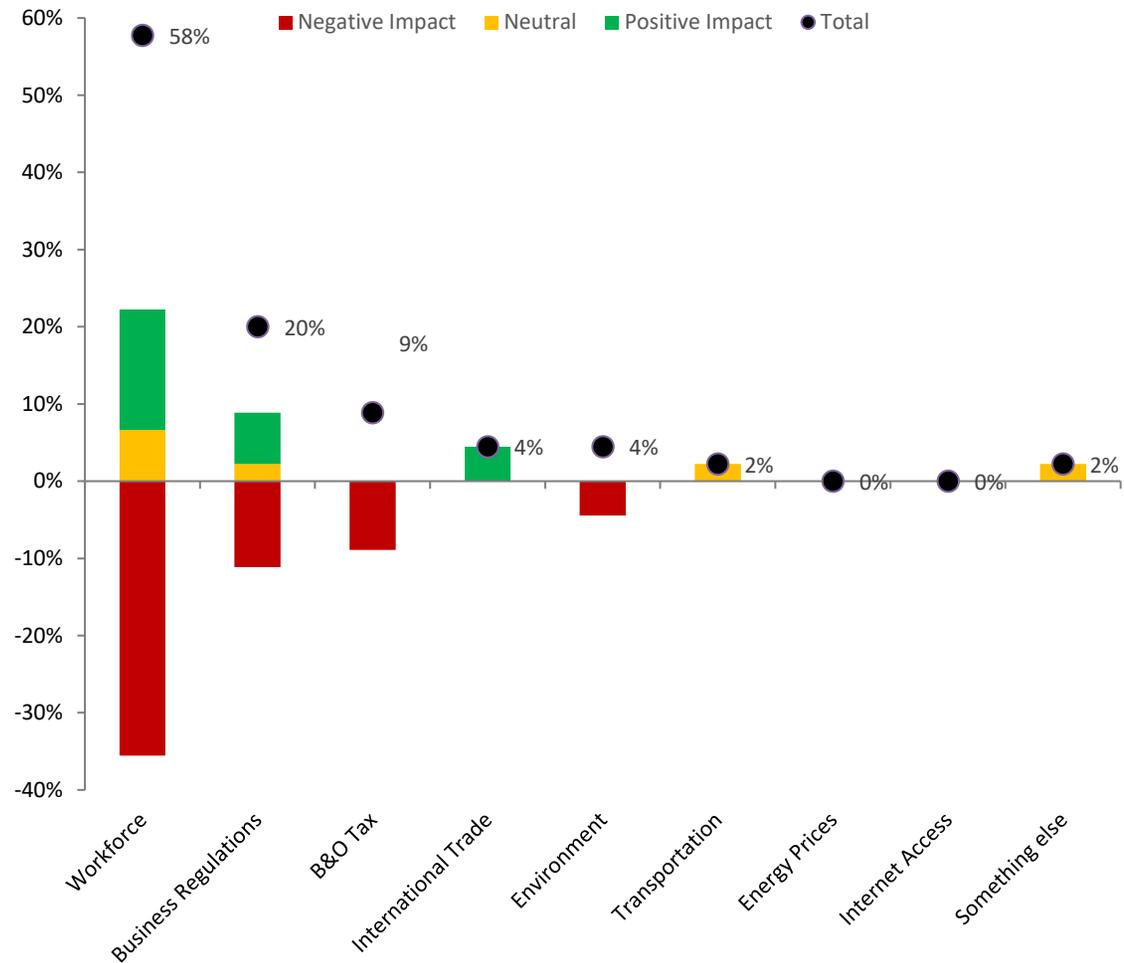
ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .  
Base: Retail (n=85)

## Tourism

Access to talent or qualified employees is the top mentioned factor for Tourism. Mentions of the workforce are significantly higher among Tourism than all other business sectors

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

Figure 22: Factors with the Biggest Impact – Tourism – 2019 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .  
 Base: Tourism (n=45)

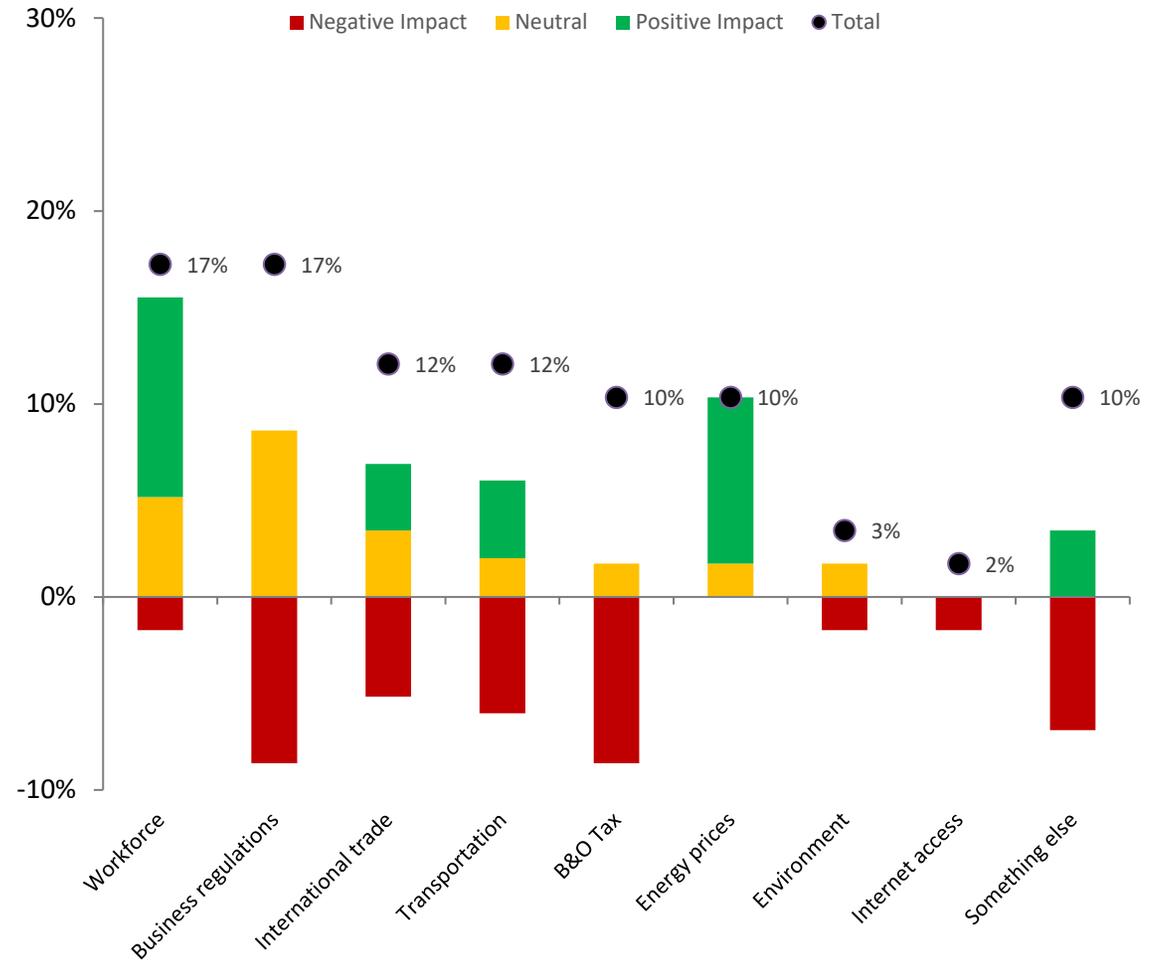
### Creative Industries

Workforce and Business Regulations are the top-mentioned impacts among Creative Industries.

These businesses appear generally optimistic about the availability of qualified workers. The opposite is true regarding business regulations.

Other key areas for these industries are International trade and transportation. Both of these are somewhat mixed, but generally are thought to have a more negative impact.

Figure 23: Factors with the Biggest Impact – “Creative Industries” Sector – 2019 Only



ST5 - Which of the following factors will have the biggest impact on your business in the next three to five years? ST6 - [ASK IF ST5<998] When thinking about how [INSERT ANSWER FROM ST5] will impact your business over the next few years, do you believe that the impact will be . . .  
 Base: Creative Industries (n=58)

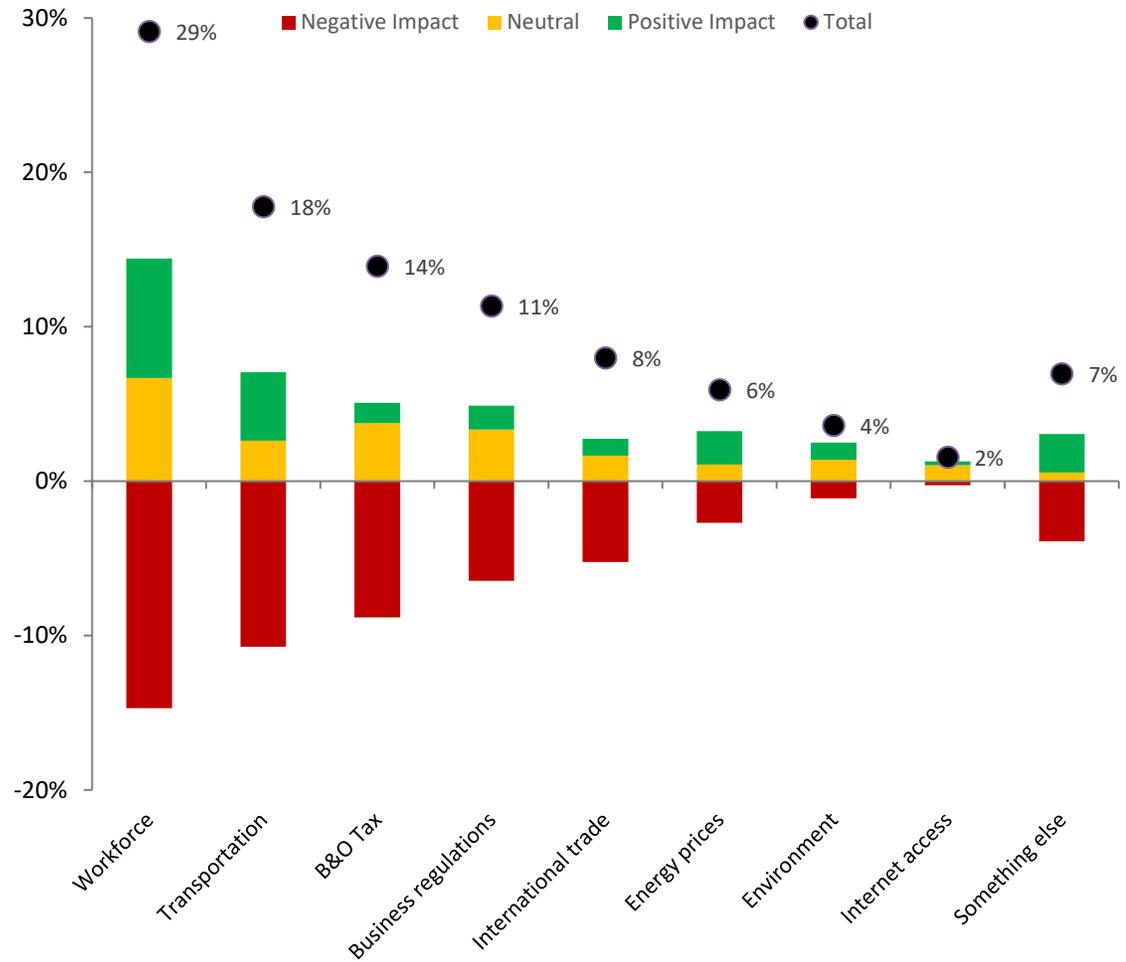
### Other Businesses

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

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

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

Figure 24: Factors with the Biggest Impact – “Other” Sector – 2019 Only



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

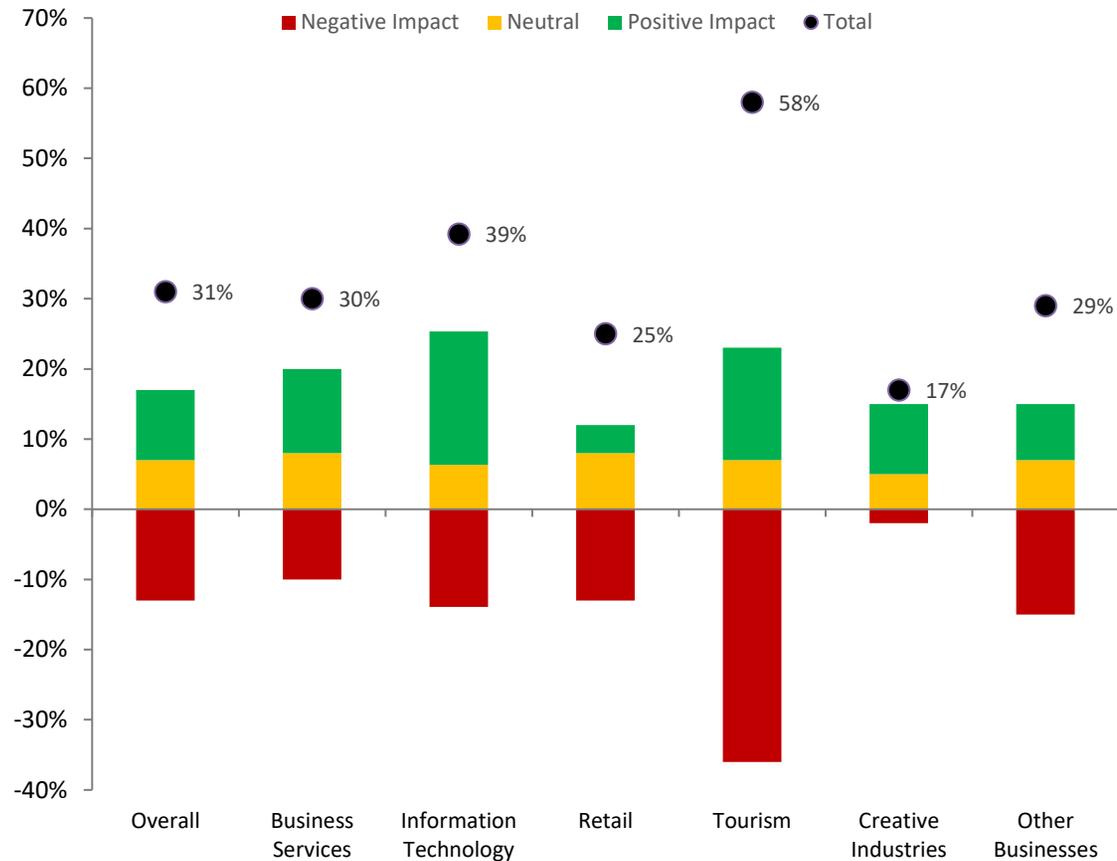
### A Detailed Look at Workforce

As noted on the previous pages, the workforce is also the most commonly mentioned factor across all business sectors.

Compared across sectors, the impact of the workforce is most notable among businesses in the Tourism sector. Over half of businesses in this sector indicate the workforce as having the largest impact, and the majority of those businesses indicate it will have a negative impact.

This is an area for concern, and while the survey did not ask “why” businesses feel the way they do this is an area for in-depth follow-up either through direct outreach or follow-up research.

Figure 25: Impact of Workforce Across Sectors— 2019 Only



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

[Blank page inserted for pagination purposes.]

## KEY FINDINGS—COMMUNITY CHARACTERISTICS

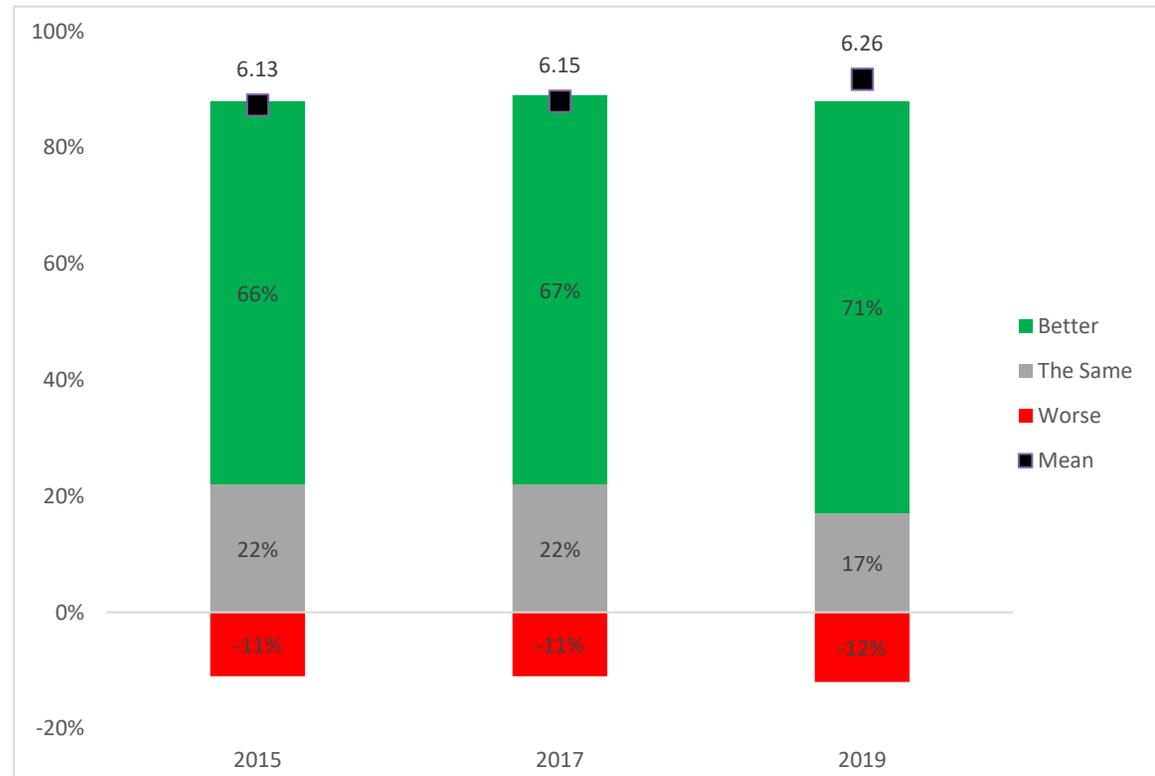
### OVERALL COMMUNITY CHARACTERISTICS

Businesses were shown 12 key attributes that pertain to running a business in Bellevue and asked to compare Bellevue to other cities and towns for each attribute. Businesses used an 11-point scale where “0” indicated Bellevue was “significantly worse than other cities and towns” and “10” indicated Bellevue was “significantly better than other cities and towns.”

An overall rating was computed encompassing all 12 attributes.

There has been no significant change in the overall ratings.

Figure 26: Overall Community Characteristics



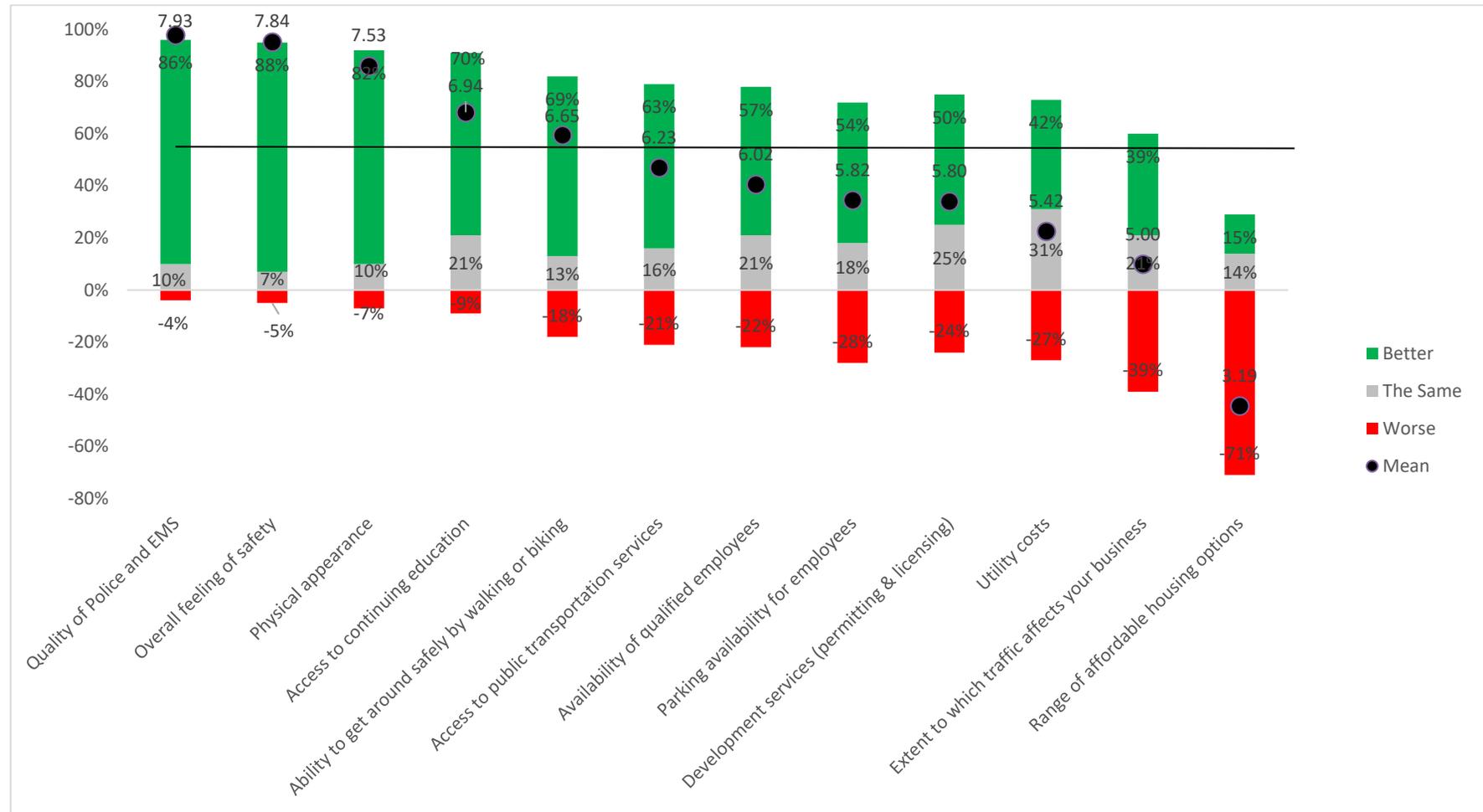
CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

Bellevue is seen as doing better than other cities and towns in areas focused around safety and appearance. It also does well for access to continuing education and ability to get around safely by walking or biking. Bellevue is seen as worse than other cities and towns in terms of the range of affordable housing options for employees. Views about the effect of vehicle traffic on businesses are decidedly mixed.

Figure 27: Ratings for Community Characteristics: 2019



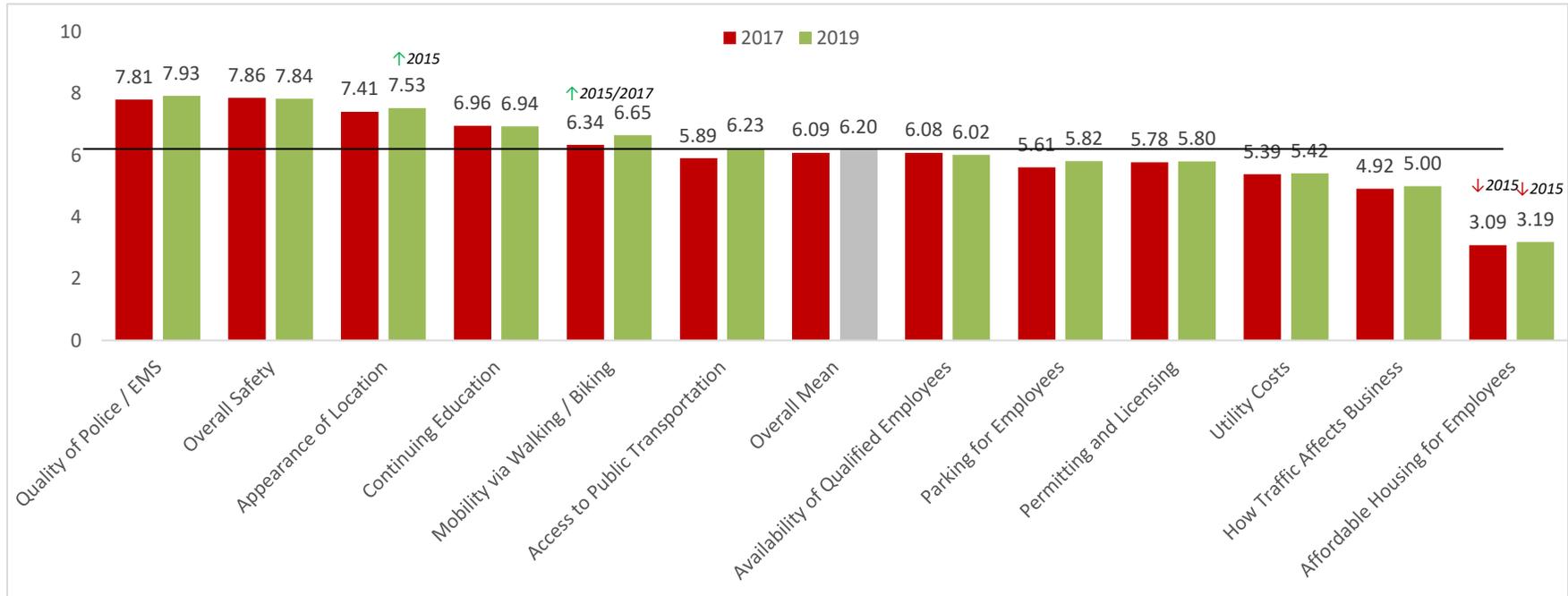
CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where "0" means "significantly worse" and "10" means "significantly better" than other cities

Mobility options for walking and biking have increased in 2019 and are significantly higher than they were in previous waves. Bellevue is underperforming in areas regarding traffic and affordability. Affordable housing for employees continues to be significantly lower than 2015.

Figure 28: Community Characteristics for Operating a Business in Bellevue – Year over Year (2015 not shown, but comparisons made)



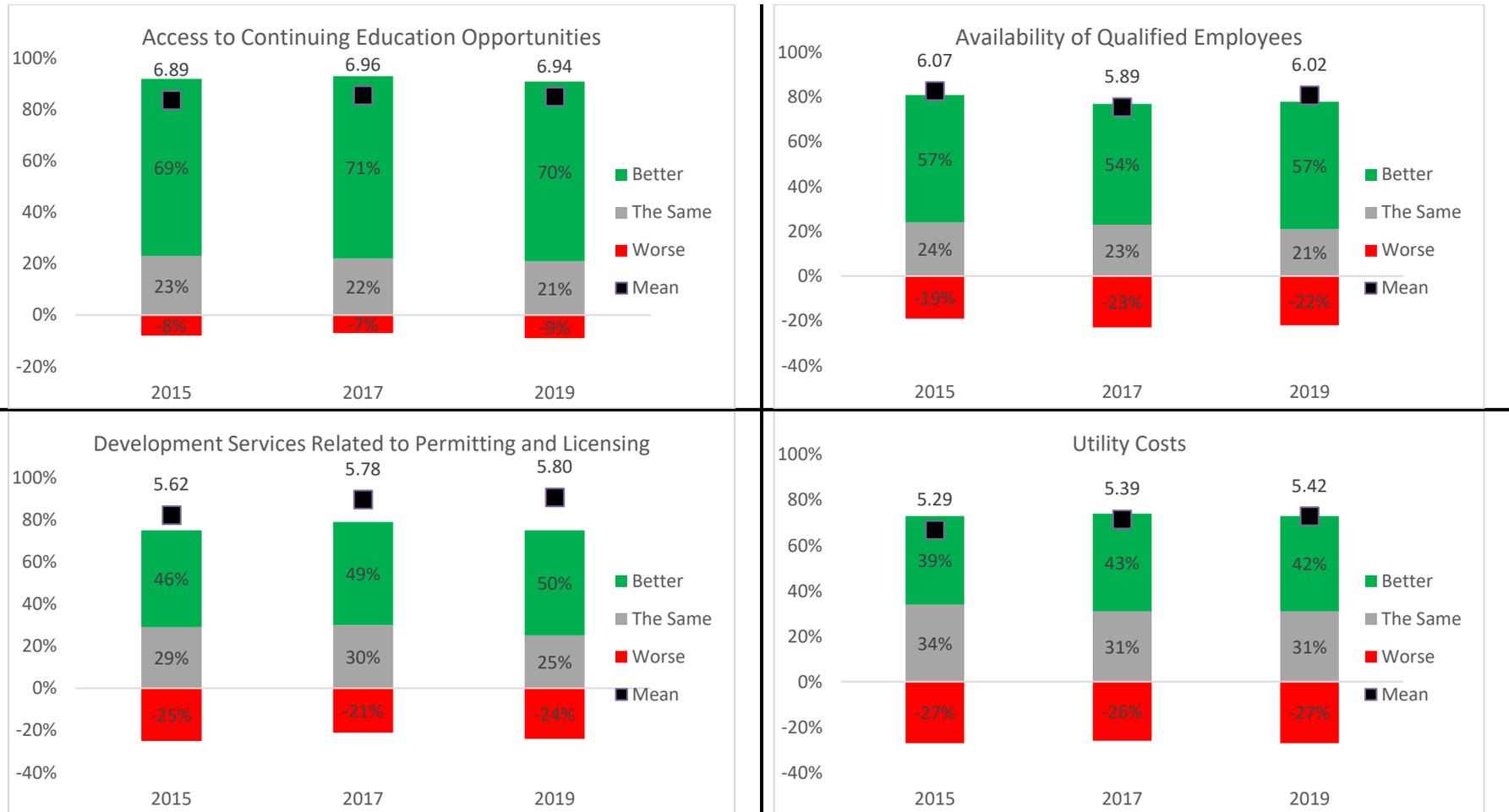
CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?  
 Base: All respondents (2015=917; 2017=994, 2019=1,025)  
 Mean is based on an 11-point scale from 0 to 10

[Blank page inserted for pagination purposes.]

## BUSINESS ATTRIBUTES

Four out of the 12 Community Characteristics Attributes specifically deal with running a business. These are: having access to continuing education, the availability of qualified employees, services related to permitting and licensing, and utility costs. Bellevue consistently receives ratings that are above the mid-point for all four of the business-related attributes. There have been no significant changes in these ratings over the years.

Figure 29: Changes in Business Attribute Ratings 2015 - 2017



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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where "0" means "significantly worse" and "10" means "significantly better" than other cities

With the exception of availability of qualified employees, there are few differences in ratings for business attributes across the different sectors. Business Services and Information Technology companies give higher ratings than the other sectors (notably retail and, to a lesser extent, other) for the availability of qualified employees.

Figure 30: Business Attributes for Operating a Business in Bellevue by Sector – 2019 Only



Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

## PHYSICAL ATTRIBUTES

Three of the 12 attributes deal specifically with physical issues such as location and safety. The quality of police and emergency medical services and overall safety are clearly strengths of the city and performance in these areas has been stable over the years.

The physical appearance of where the business is located is also rated positively. Moreover, ratings for these characteristics have improved year over year, due to a shift within the “better” than other cities category—increasingly Bellevue businesses are saying the physical appearance of where they are located is significantly better than other cities or towns—increasing from 32% in 2015 to 37% in 2019.

Figure 31: Changes in Physical Attribute Ratings 2015 - 2017



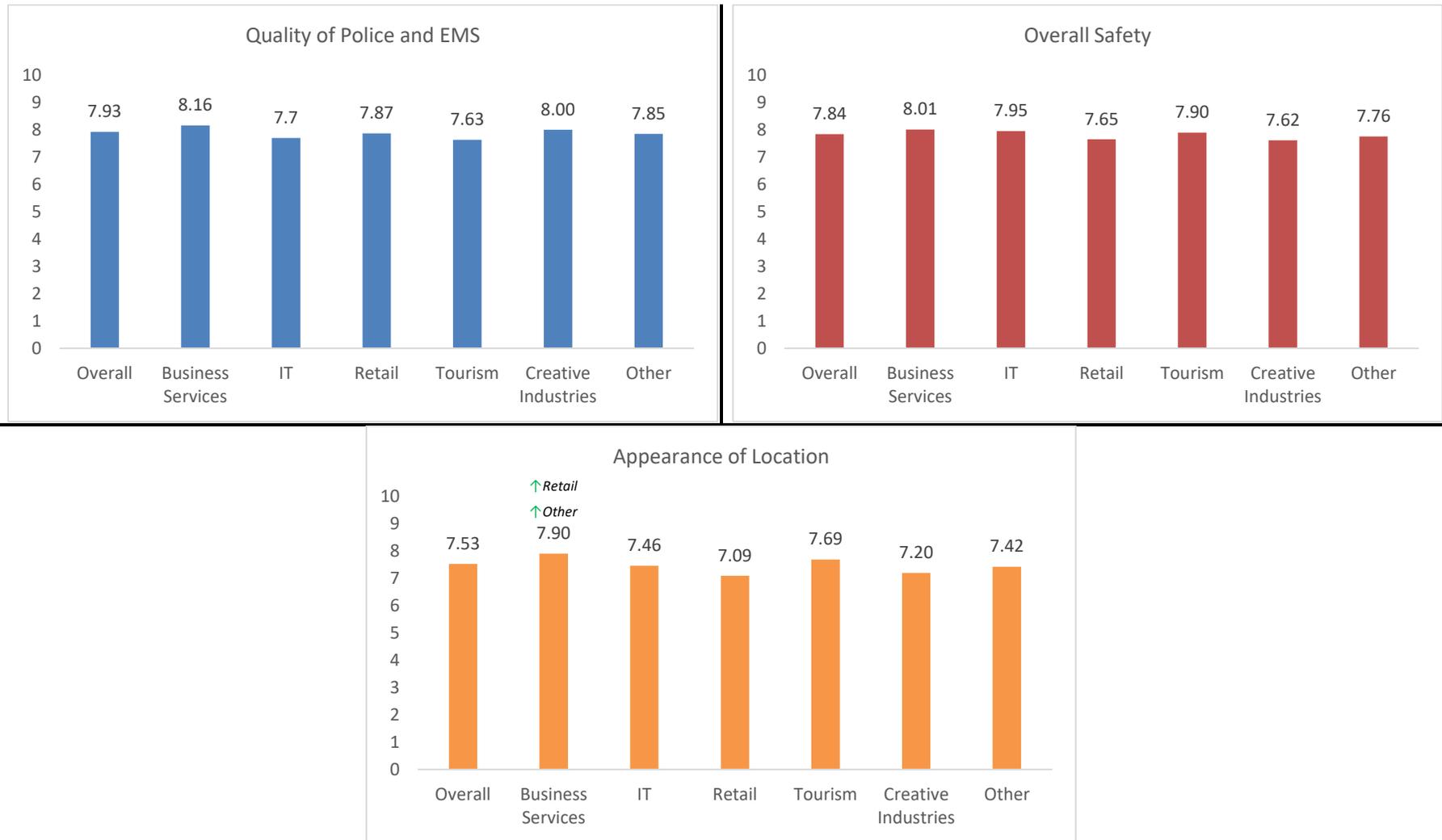
CC1— From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items?

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

Businesses across all sectors give similar ratings for quality of police and EMS and overall safety. While still positive, retail establishments give somewhat lower ratings for physical appearance. This is due to a small percentage (5%) who rated Bellevue as significantly worse than other cities or towns for the appearance of the location. There were no other notable differences based on location, size, or age of business.

Figure 32: Physical Attributes for Operating a Business in Bellevue by Sector – 2019 Only



Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

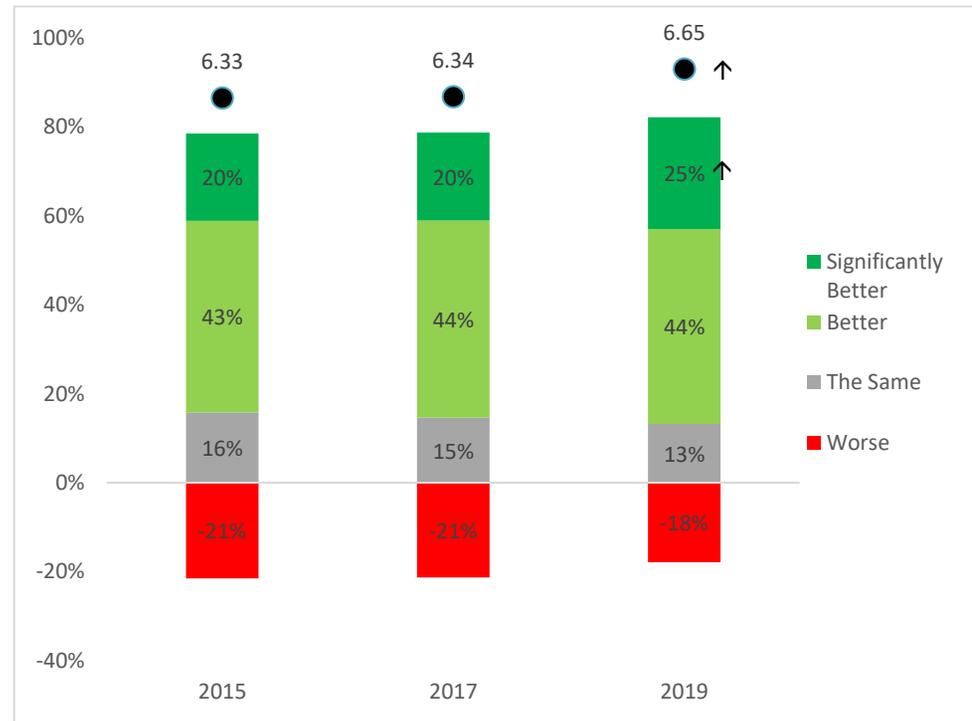
## TRANSPORTATION AND HOUSING ATTRIBUTES

There are five (5) attributes related to transportation and housing. It is here that we see the most change over time as well as differences by business demographics. We address each one separately. As we found no differences by business sector, we focused our analysis on location.

### Ability to Safely Get Around Town by Biking or Walking

Businesses feel there has been a significant improvement in the ability to get around town safely by biking or walking—one out of four businesses feel that Bellevue is significantly better than other cities or towns in this regard. Businesses located in Downtown Bellevue give the highest ratings for this community characteristic.

Figure 33: Ability to Get Around Town by Biking or Walking



Total (n = 1,025)	116th / Bellefield (n = 68)	Crossroads (n = 20)	Downtown (n = 168)	Factoria / Eastgate (n = 72)	Outside MEC (n = 434)	SR-520 / Bel-Red (n = 263)
<b>2019</b>						
6.65	6.30	5.68	7.16	6.99	6.49	6.67

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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

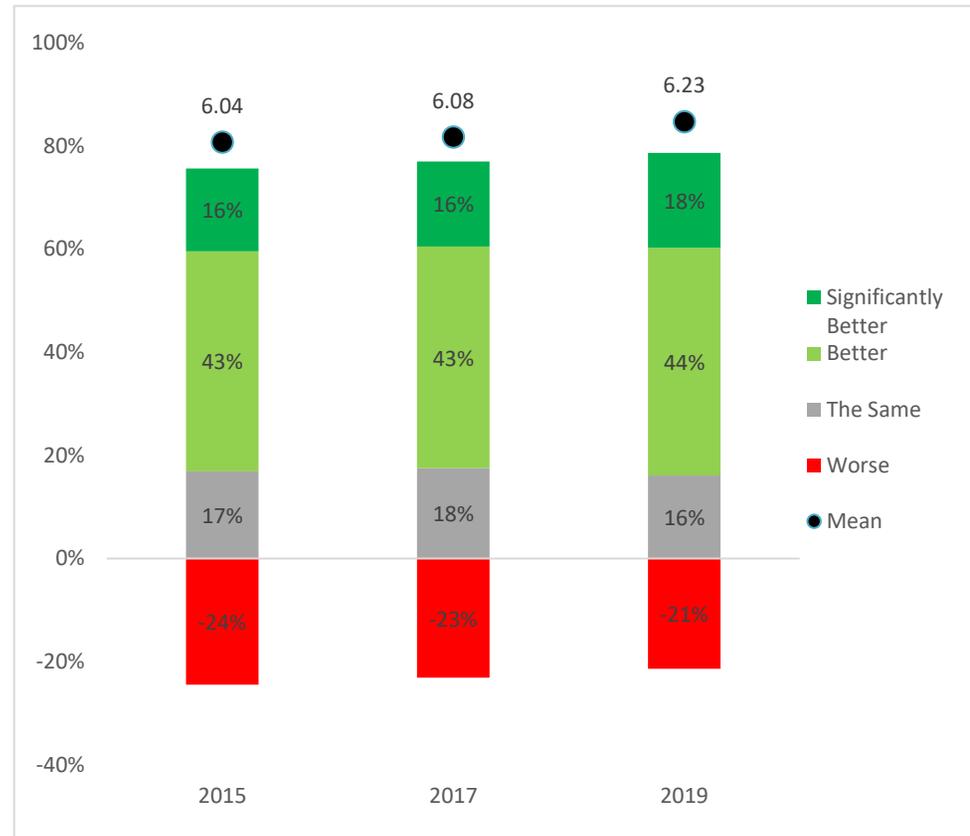
Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

### Access to Public Transportation Services

The majority of Bellevue businesses rate the city positively in terms of access to public transportation services. There has been no significant change in these ratings over the years.

Businesses in Downtown Bellevue are the most positive about access to public transportation services. Those in the 116<sup>th</sup> / Bellefield MEC are the most likely businesses to express negative views on access to public transportation.

Figure 34: Access to Public Transportation Services



Total (n = 1,025)	116th / Bellefield (n = 68)	Crossroads (n = 20)	Downtown (n = 168)	Factoria / Eastgate (n = 72)	Outside MEC (n = 434)	SR-520 / Bel-Red (n = 263)
<b>2019</b>						
<b>6.23</b>	5.71	6.17	6.73	6.23	6.10	6.28

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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

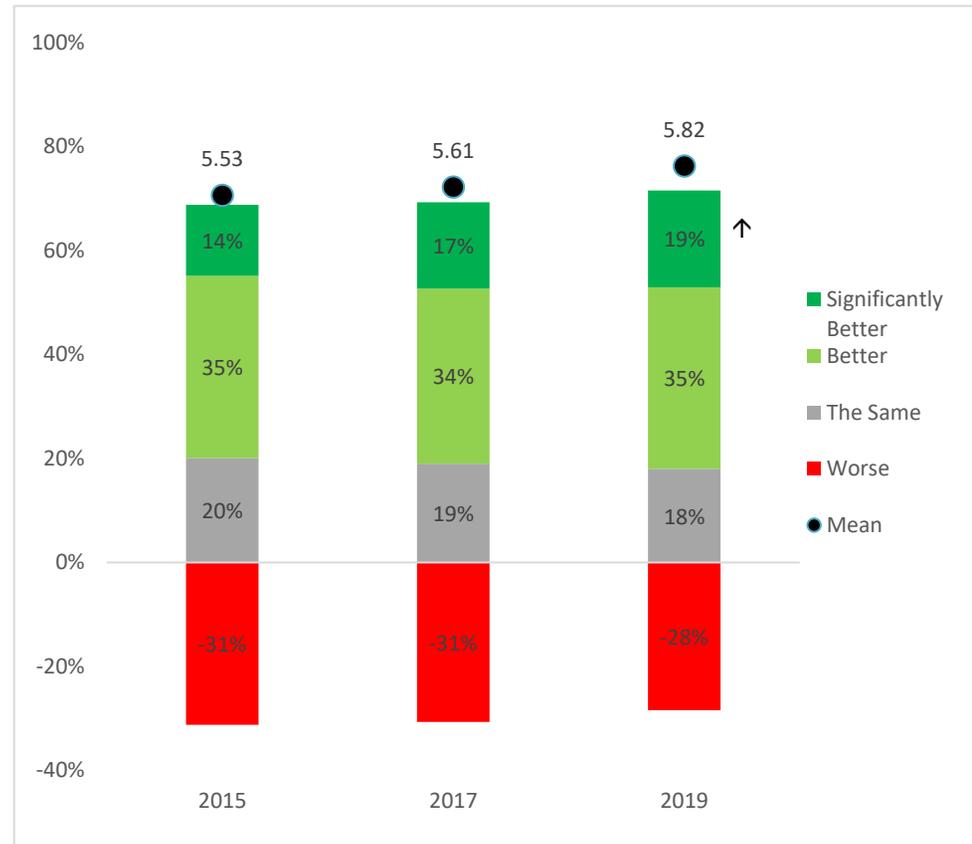
## Parking Availability for Employees

Businesses' ratings for parking availability for employees is somewhat mixed. While more than half of all businesses feel that parking availability for employees in Bellevue is better than other cities and towns, more than one out of four feels that it is worse.

Businesses in Downtown Bellevue give the city the lowest rating for this community characteristic—44% say Bellevue is better and 40% say it is worse.

The percentage feeling that it is significantly better has increased over the years.

Figure 35: Parking Availability for Employees



Total (n = 1,025)	116th / Bellefield (n = 68)	Crossroads (n = 20)	Downtown (n = 168)	Factoria / Eastgate (n = 72)	Outside MEC (n = 434)	SR-520 / Bel-Red (n = 263)
<b>2019</b>						
<b>5.82</b>	6.37	6.20	5.10	6.19	5.71	6.15

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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

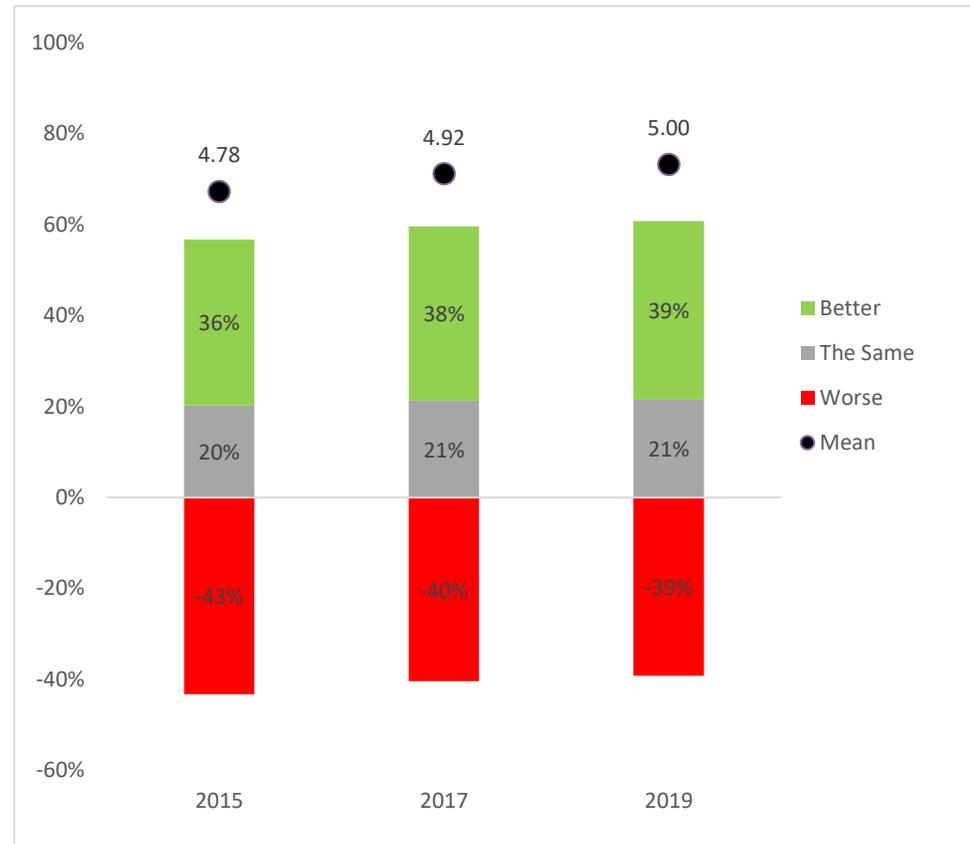
Mean is based on an 11-point scale from 0 to 10 where "0" means "significantly worse" and "10" means "significantly better" than other cities

### Extent to which Vehicle Traffic Affects Your Business

Businesses' ratings for the extent to which vehicle traffic affects their business is decidedly mixed, with an equal number saying that Bellevue is better and worse than other cities and towns. These ratings have been similar for all years.

There are no differences in these ratings by business location.

Figure 36: Vehicle Traffic Effect on Business



Total (n = 1,025)	116th / Bellefield (n = 68)	Crossroads (n = 20)	Downtown (n = 168)	Factoria / Eastgate (n = 72)	Outside MEC (n = 434)	SR-520 / Bel-Red (n = 263)
<b>2019</b>						
<b>5.00</b>	4.87	5.85	5.01	4.79	5.04	4.94

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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

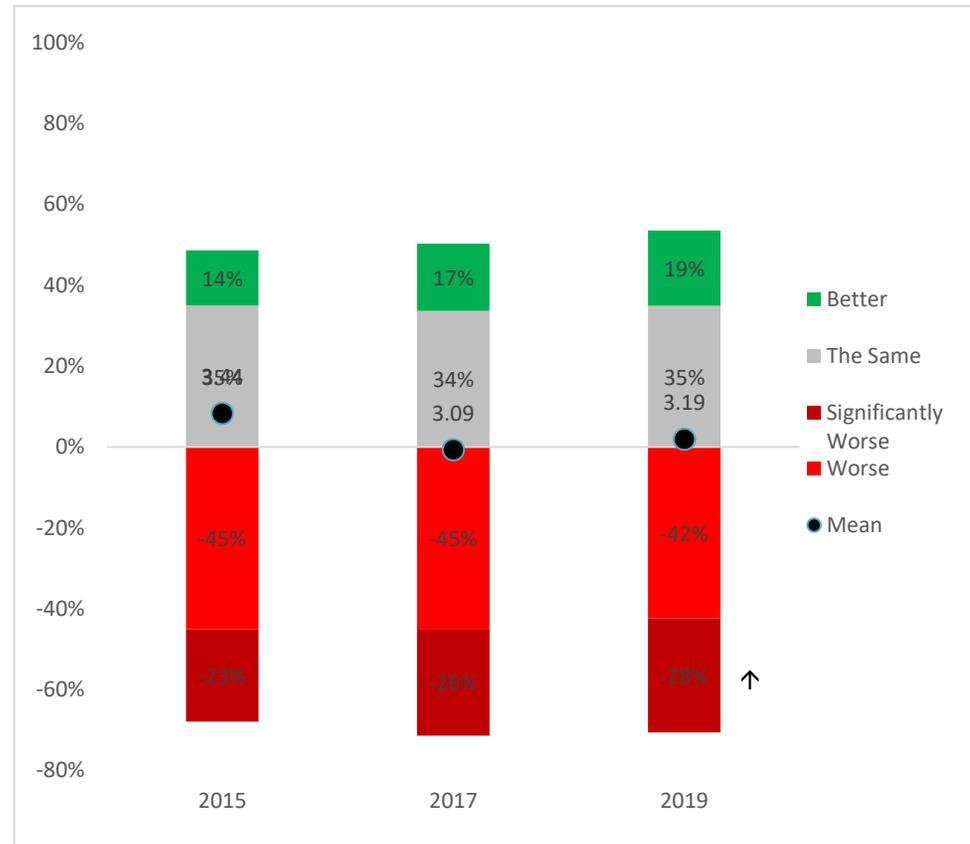
Mean is based on an 11-point scale from 0 to 10 where "0" means "significantly worse" and "10" means "significantly better" than other cities

### Range of Affordable Housing Options for Employees

Businesses' ratings for housing affordability for employees are clearly negative. Seven out of ten businesses say that affordable housing options are worse than other cities. The percentage saying it is significantly worse has increased each year and is now significantly higher than the 2015 baseline.

There are no differences in these ratings by business location.

Figure 37: Range of Affordable Housing Options for Employees



Total (n = 1,025)	116th / Bellefield (n = 68)	Crossroads (n = 20)	Downtown (n = 168)	Factoria / Eastgate (n = 72)	Outside MEC (n = 434)	SR-520 / Bel-Red (n = 263)
<b>2019</b>						
<b>3.19</b>	2.97	3.50	3.14	3.19	3.32	3.02

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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on an 11-point scale from 0 to 10 where "0" means "significantly worse" and "10" means "significantly better" than other cities

[Blank page inserted for pagination purposes.]

## KEY FINDINGS—SMALL BUSINESS RESOURCES

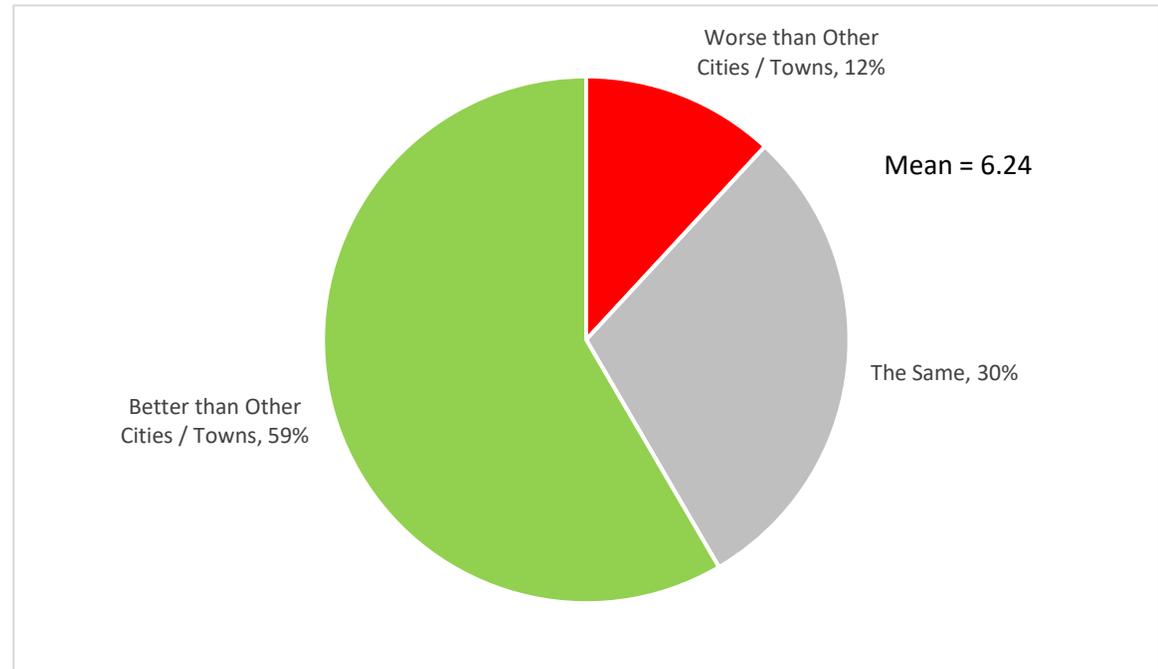
New questions were added in 2019 to gain additional insights into how small businesses (defined as five or fewer employees) feel Bellevue provides the support they need.

### Access to Business Organizations or Business Services Providers

Bellevue’s small businesses give the city the highest ratings for access to business organizations or business service providers.

There are no differences in ratings by business sector.

Figure 38: Access to Business Organizations or Business Service Providers



Total (n = 529)	Business Services (n = 183)	IT (n = 41)	Retail (n = 47)	Tourism (n = 13)	Creative Industries (n = 41)	Other (n = 204)
6.24	6.44	6.24	5.79	6.54	5.78	6.24

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: Small Businesses (5 or fewer employees) (2019=529)

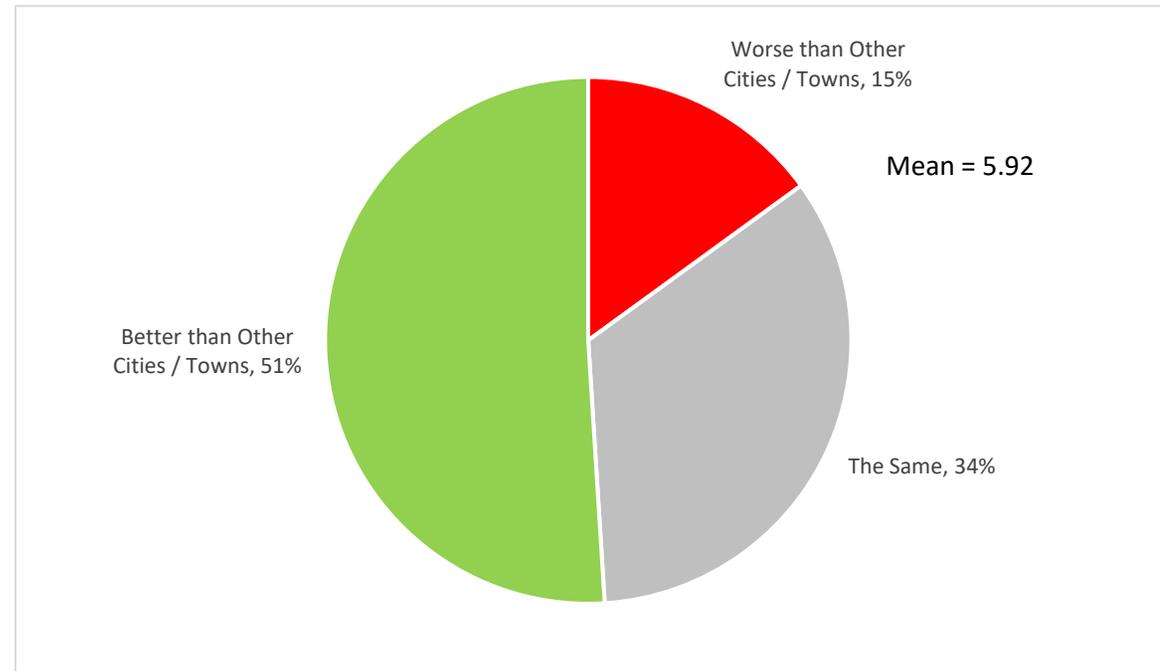
Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

### Access to Capital to Grow Business

Half of Bellevue’s small businesses feel that their access to capital to grow their business is better than other cities or towns; 11% feel it is significantly better and 40% feel it is somewhat better.

Those in the Information Technology and, to a lesser extent, Business Services sectors are the most positive—60% and 55% better than other cities and towns, respectively. On the other hand, those in the Creative Industries sector are least positive—38% positive versus 25% negative.

Figure 39: Access to Capital to Grow Business



Total (n = 529)	Business Services (n = 183)	IT (n = 41)	Retail (n = 47)	Tourism (n = 13)	Creative Industries (n = 41)	Other (n = 204)
5.92	6.14	6.49	5.51	5.92	4.95	5.90

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: Small Businesses (5 or fewer employees) (2019=529)

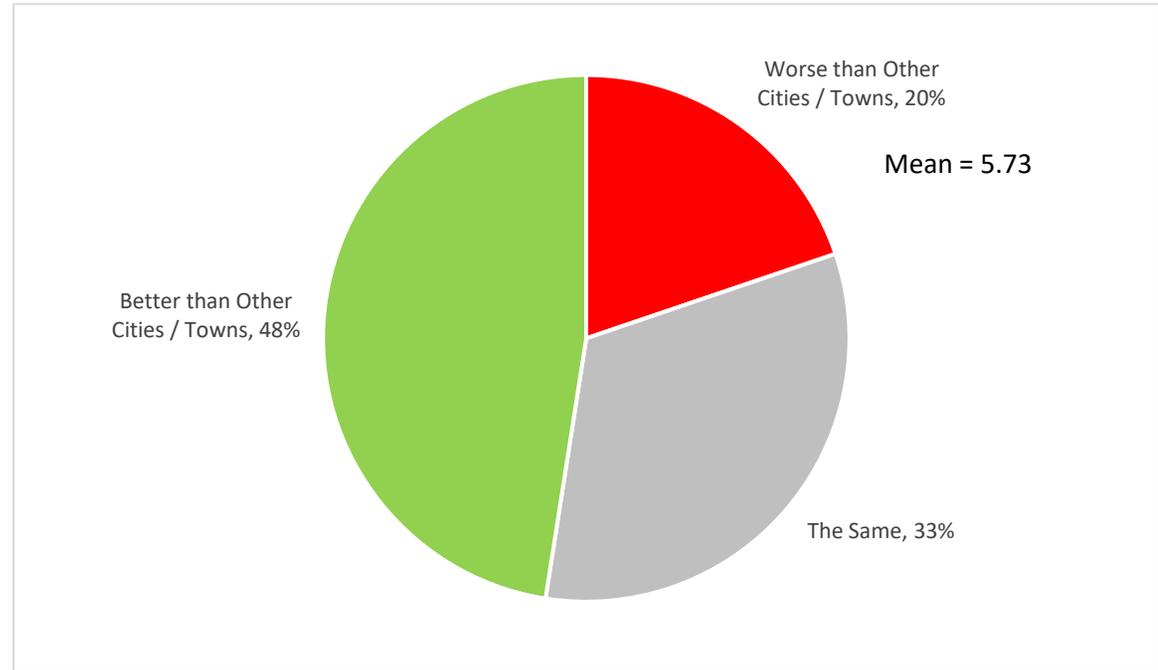
Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

### Access to Support Services for New Businesses

Just under half of Bellevue’s small businesses feel that their access to support services for new businesses is better than other cities or towns; 11% feel it is significantly better and 36% feel it is somewhat better.

Those in the Creative Industries and, to a lesser extent, Retail sectors are the least positive.

Figure 40: Access to Support Services for New Businesses



Total (n = 529)	Business Services (n = 183)	IT (n = 41)	Retail (n = 47)	Tourism (n = 13)	Creative Industries (n = 41)	Other (n = 204)
<b>5.73</b>	5.96	6.15	5.21	5.54	4.59	5.79

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: Small Businesses (5 or fewer employees) (2019=529)

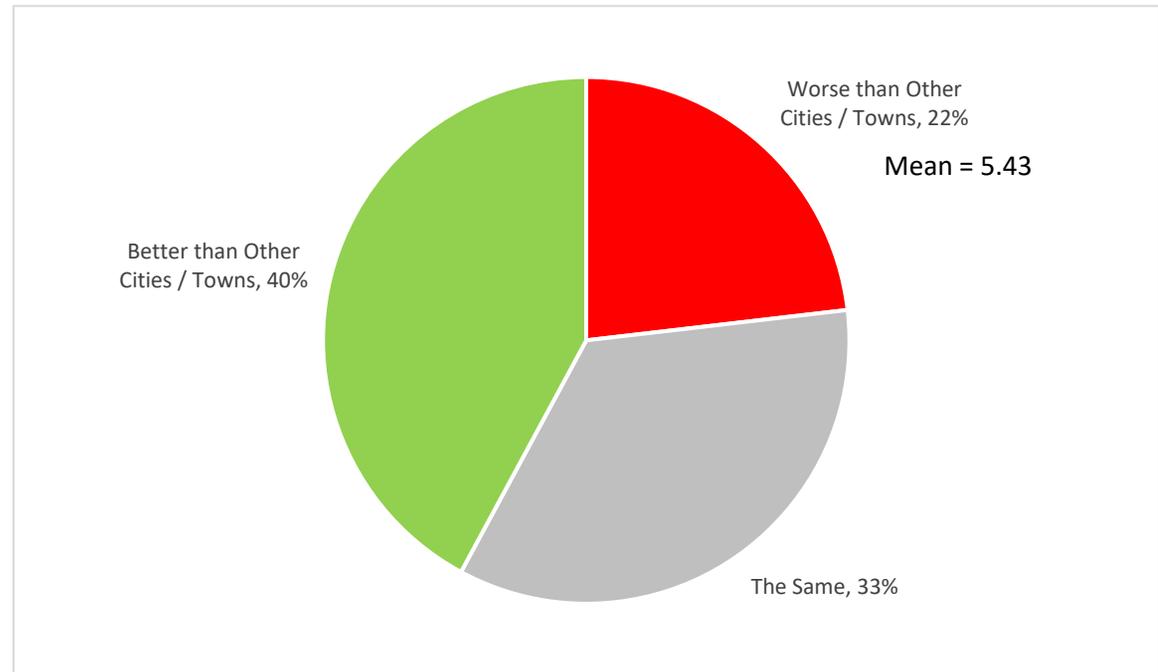
Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

### Access to Incubators

Ratings for access to incubators are more mixed with a nearly equal percentage saying Bellevue is better than other cities or towns versus the same as other cities or towns. One out of five small businesses feel Bellevue is worse.

There are no significant differences in perceptions regarding access to incubators by business sector.

Figure 41: Access to Incubators



Total (n = 529)	Business Services (n = 183)	IT (n = 41)	Retail (n = 47)	Tourism (n = 13)	Creative Industries (n = 41)	Other (n = 204)
<b>5.43</b>	5.57	5.97	4.97	5.73	4.91	5.34

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: Small Businesses (5 or fewer employees) (2019=529)

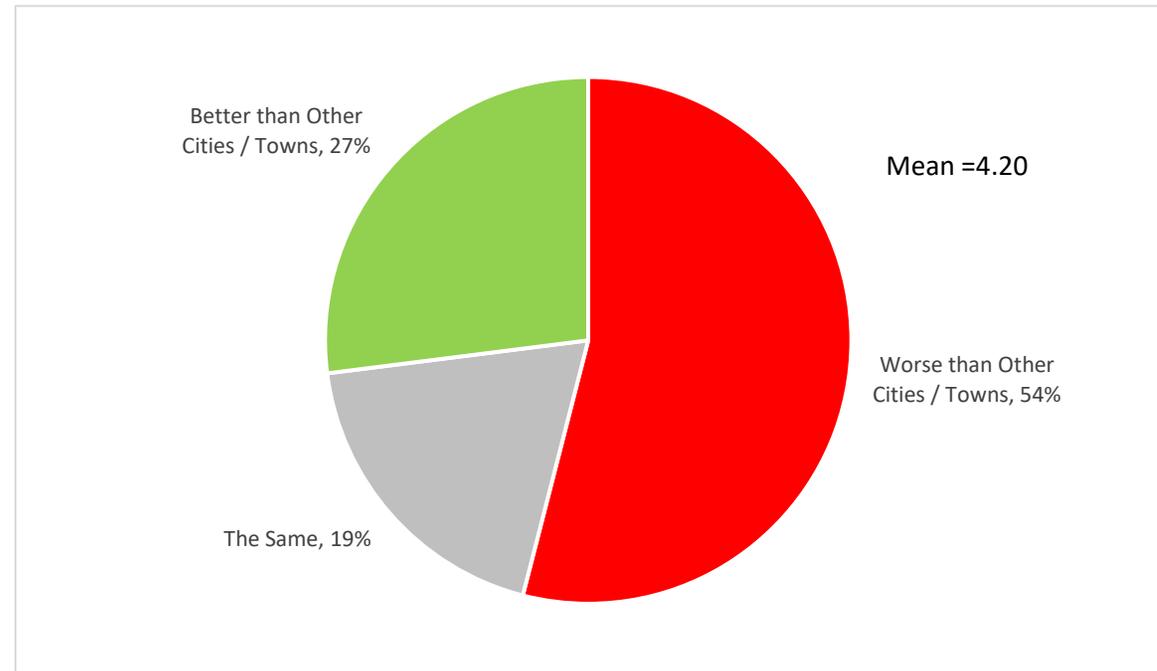
Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

### Access to Affordable Office, Industrial, or Other Working Spaces

Bellevue’s small businesses are generally negative about access to affordable office, industrial or other working spaces when compared to other communities.

There are no significant differences in perceptions regarding access to incubators by business sector or business location.

Figure 42: Access to Affordable Office, Industrial, or Other Working Spaces



Total (n = 529)	Business Services (n = 183)	IT (n = 41)	Retail (n = 47)	Tourism (n = 13)	Creative Industries (n = 41)	Other (n = 204)
4.20	4.19	5.05	4.07	4.54	3.56	4.18

CC3— 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: Small Businesses (5 or fewer employees) (2019=529)

Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse” and “10” means “significantly better” than other cities

[Blank page inserted for pagination purposes.]

## KEY FINDINGS—BUSINESS HEALTH

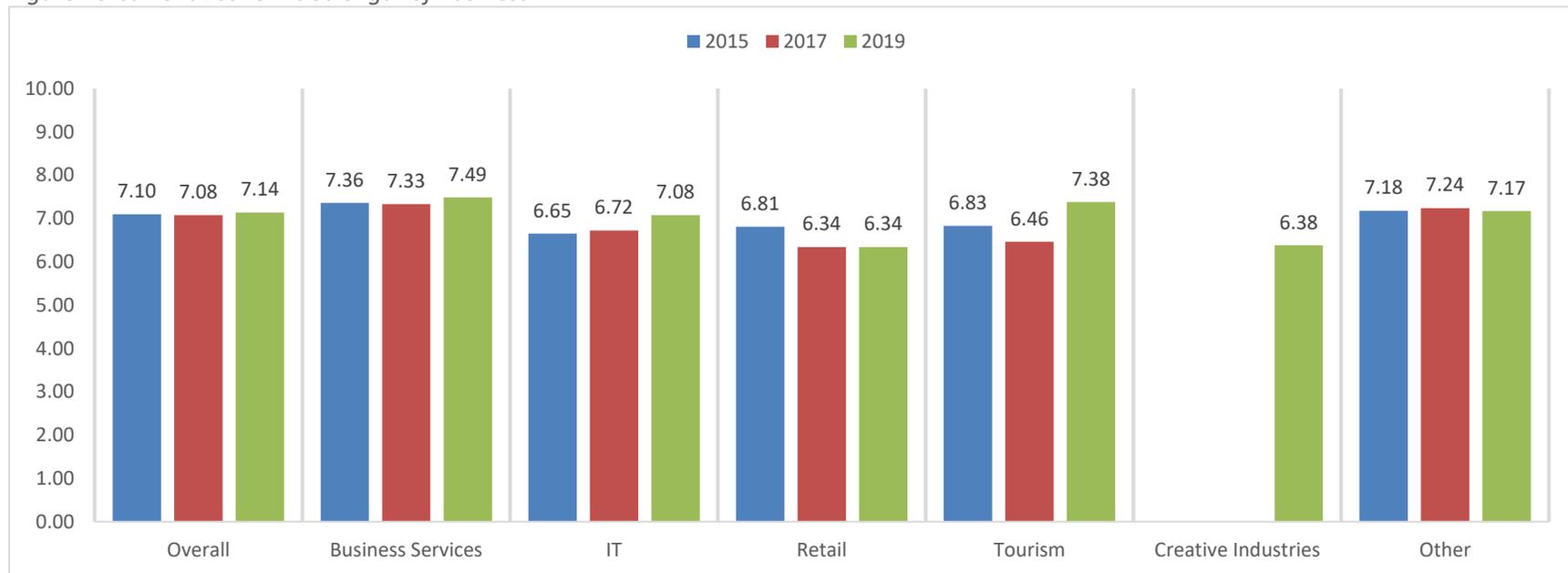
### CURRENT ECONOMIC STRENGTH OF BUSINESS

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

	2015	2017	2019
<b>Strong</b>	80%	79%	80%
<b>Very Strong</b>	23%	23%	24%
<b>Strong</b>	57%	56%	56%
<b>Neutral</b>	12%	11%	12%
<b>Weak</b>	8%	10%	8%
<b>Mean</b>	7.10	7.08	7.14

Those in the Business Services and Tourism sectors give the highest ratings for economic strength while those in the Creative Industries sector give the lowest. While there has been some movement from year to year within sectors, all differences, including the change seen in Tourism, are within the margin of error.

Figure 43 Current Economic Strength of Business



BC2—

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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

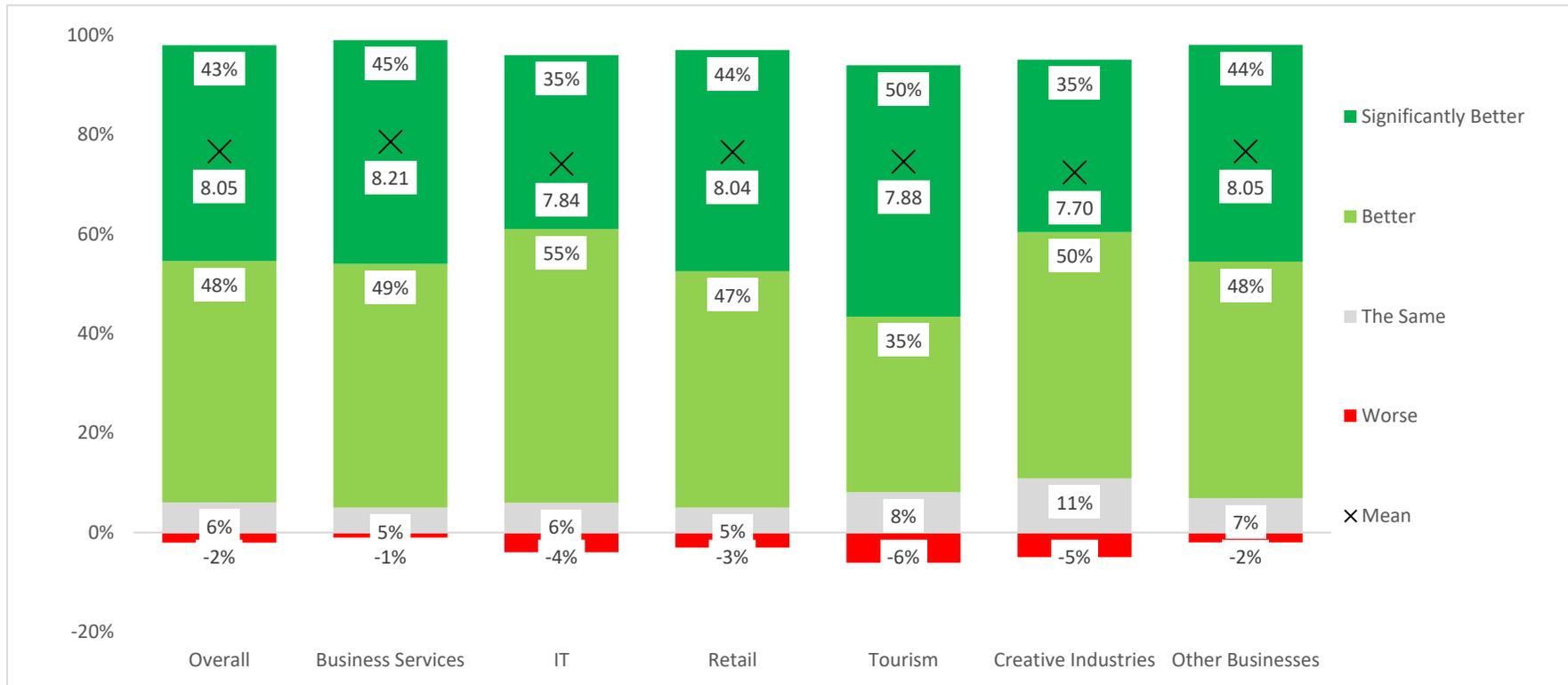
Mean is based on an 11-point scale from 0 to 10 where “0” means “very weak” and “10” means “very strong”

## BELLEVUE’S ECONOMY COMPARED TO REST OF PUGET SOUND

Nine out of ten Bellevue businesses feel Bellevue’s economy is better than other Puget Sound cities and towns—this is the same as previous years. Ratings are similar across all business sectors.

	2015	2017	2019
<b>Better Than</b>	92%	90%	91%
<b>Significantly Better</b>	40%	43%	43%
<b>Better</b>	52%	46%	48%
<b>The Same</b>	6%	8%	6%
<b>Worse</b>	2%	2%	2%
<b>Mean</b>	8.04	8.04	8.05

Figure 44: Current Bellevue Economy Compared to Puget Sound Communities – 2019 Only



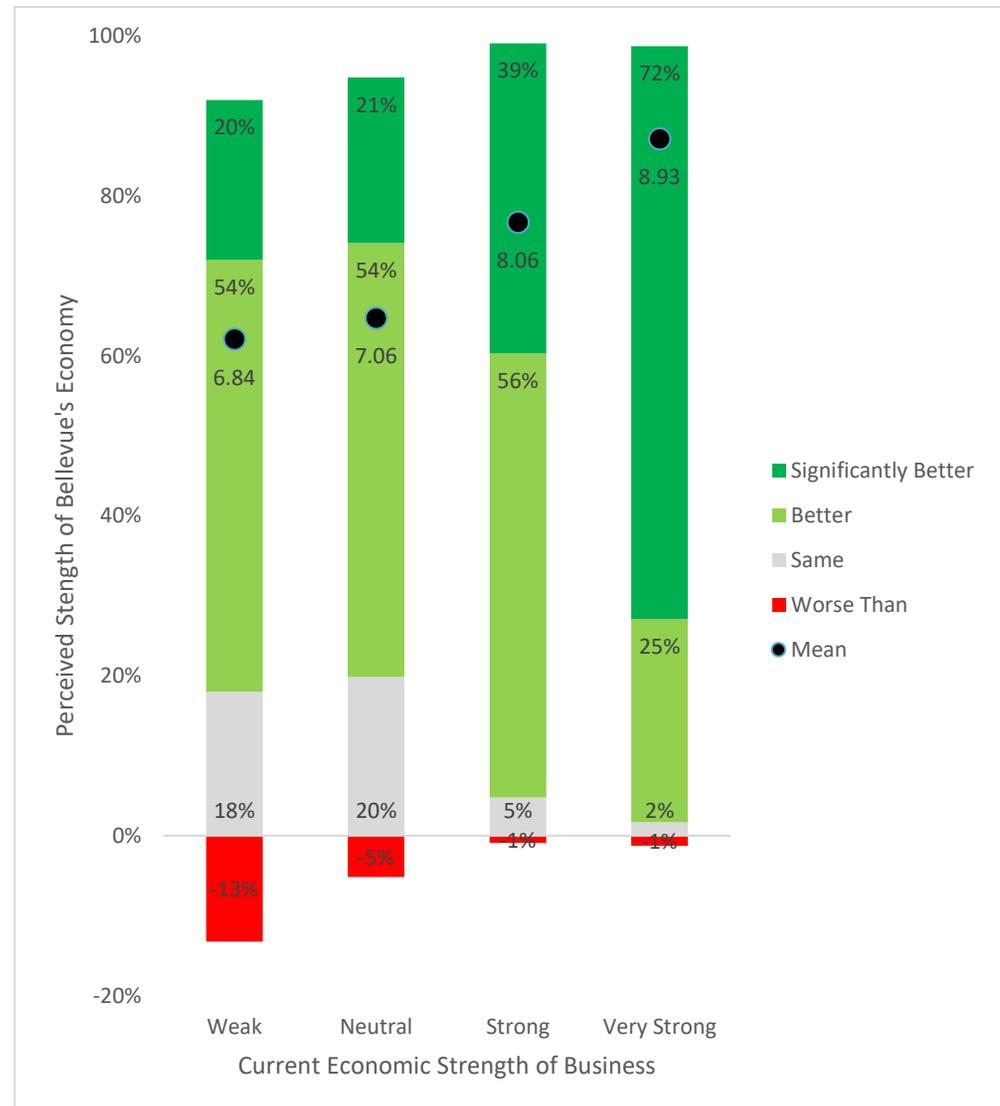
BC1— Overall, how would you rate the current state of Bellevue’s economy compared to other cities and towns in the Puget Sound region?

Base: All respondents (n=,1025); Business Services (n=300); IT (n=83); Retail (n=92); Tourism (n=48), Creative Industries (n=66), Other (n=436)

Mean is based on an 11-point scale from 0 to 10 where “0” means “significantly worse than” and “10” means “significantly better than other Puget Sound communities”

There is a clear relationship between the perceived current economic strength of the business and their perceptions of the strength of Bellevue’s economy. Nearly three out of four businesses who feel that the current economic strength of their business is very strong believe that Bellevue’s economy is significantly better than other Puget Sound communities.

Figure 45: Perceived Strength of Bellevue’s Economy by Current Economic Strength of Business



[Blank page inserted for pagination purposes.]

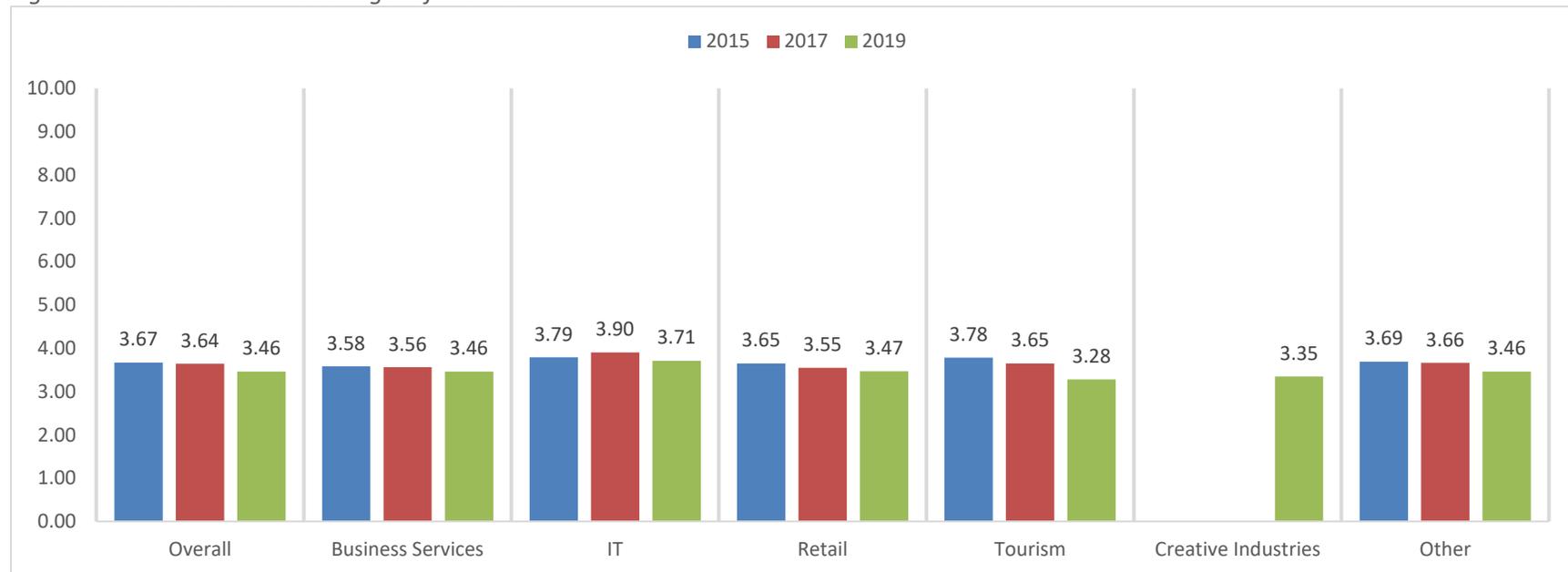
## ANTICIPATED ECONOMIC STRENGTH OF BUSINESS

Bellevue businesses are more likely than previous years to suggest that the economy will slow down and that their economic strength is less likely to improve. While half continue to be optimistic in regard to the future, 29 percent suggest little or no growth and one out of five (18%) feel that their growth will slow down.

	2015	2017	2019
<b>Improve</b>	62%	61%	53%↓
<b>Improve significantly</b>	20%	18%	15%↓
<b>Improve somewhat</b>	42%	43%	38%
<b>Stay about the same</b>	25%	28%	29%
<b>Slow Down</b>	12%	12%	18%↑
<b>Mean</b>	3.67	3.64	3.46↓

Those in the Tourism sector are the least likely to suggest that their business will grow in the next three to five years. Only two out of five (38%) businesses in the tourism sector say their business is likely to grow, down from 67% in 2015 and 60% in 2017. Instead, they are more likely to say the size of their business will remain about the same (43%). One out of five (19%) feel growth might slow down somewhat.

Figure 46 Current Economic Strength of Business



BC2—

BC3—Thinking about the next 3 to 5 years, do you feel the economic strength of your business will . . .

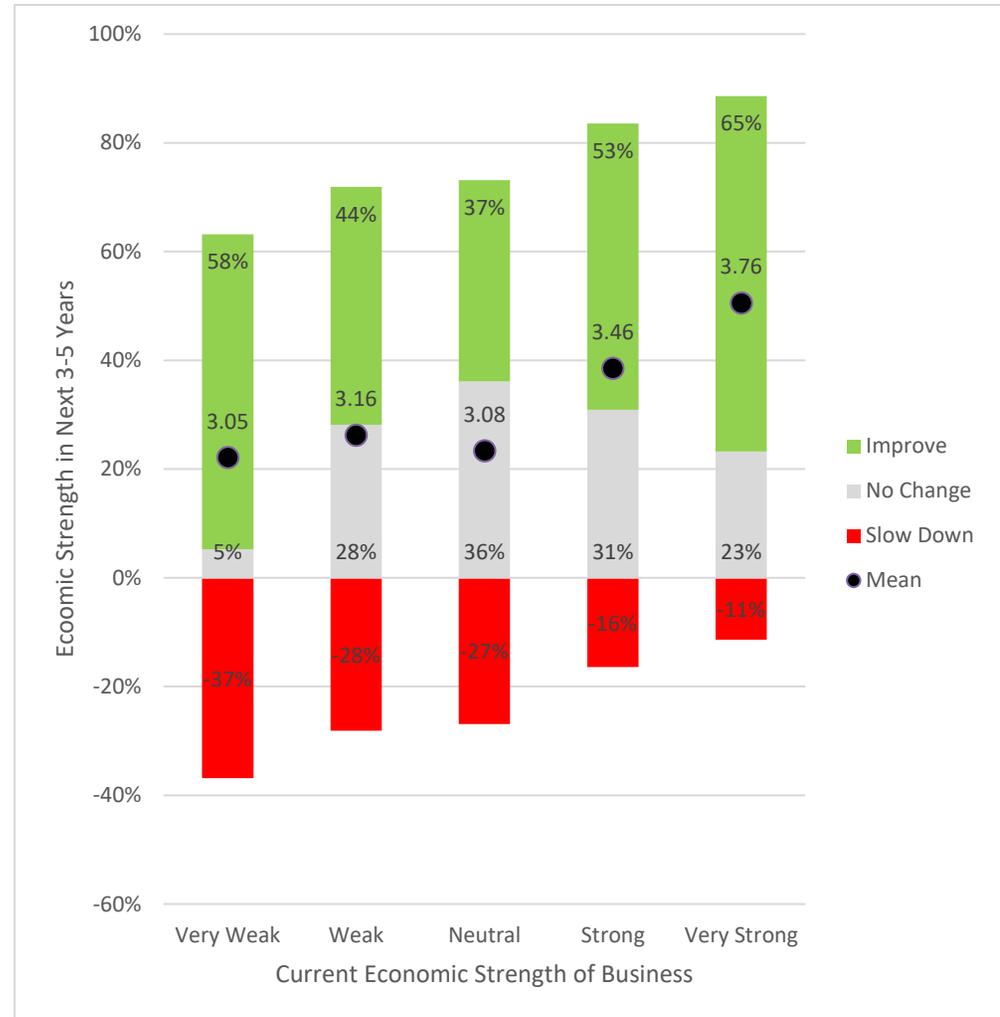
Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on a 5-point scale from 1 to 5 where "1 means "slow down significantly" and "5" means "improve significantly"

There is some relationship between the perceived current economic strength of the business and their expectations for future growth. More than half (56%) of those who feel their current business is strong or very strong believe their business will continue to grow in the next three to five years compared to 47% of those who feel their current economic strength is weak or very weak.

On the other hand, twice as many businesses who feel their current strength is weak or very weak feel their business growth will slow compared to those who feel their current strength is strong—30% compared to 15%, respectively.

Figure 47: Economic Strength in Next 3-5 Years by Current Economic Strength of Business



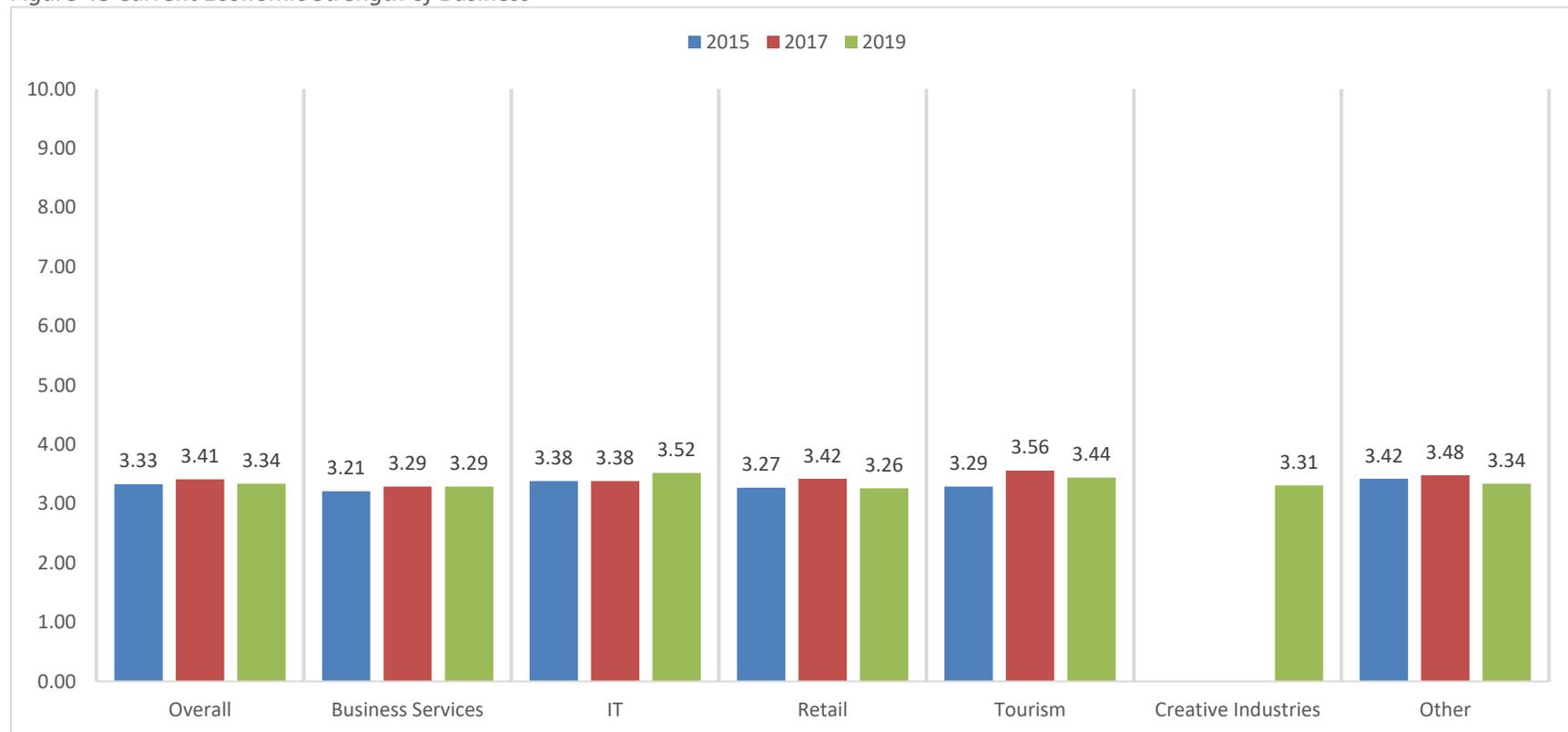
## ANTICIPATED CHANGES TO CAPITAL EXPENDITURES

The majority of Bellevue businesses suggest that they anticipate little change in their near-term (next 12 months) capital expenditures. Nearly two out of five businesses suggest that their expenditures will increase. These figures have remained relative stable over the years.

	2015	2017	2019
<b>Increase</b>	38%	43%	38%
<b>Increase significantly</b>	6%	6%	5%
<b>Increase somewhat</b>	32%	37%	33%
<b>No Change</b>	55%	51%	55%
<b>Decrease</b>	7%	6%	7%
<b>Mean</b>	3.33	3.41	3.34

There are no significant differences in anticipated changes to capital expenditures by business sector.

Figure 48 Current Economic Strength of Business



BC2—

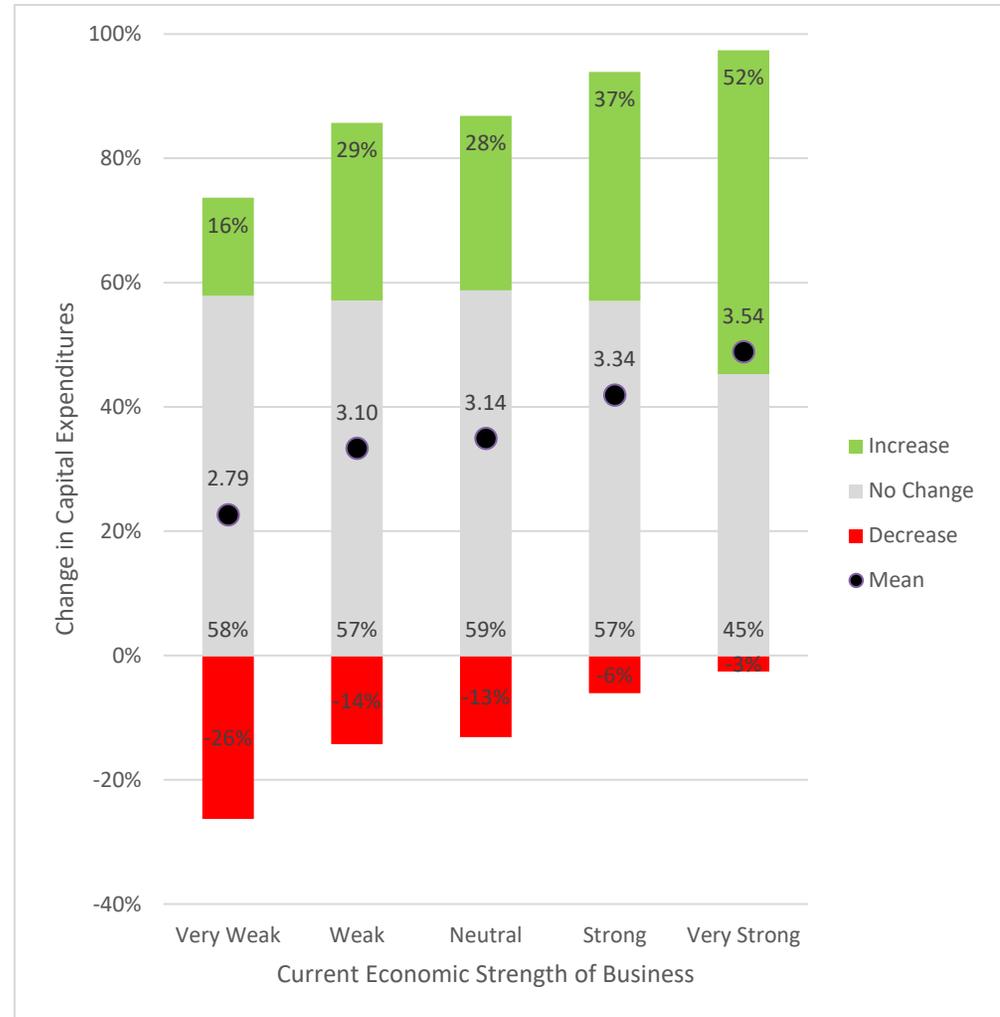
B BC4\_2—Please indicate below any anticipated changes to capital expenditures in your business over the next 12 months.

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on a 5-point scale from 1 to 5 where “1” means “decrease significantly” and “5” means “increase significantly”

There is a clear relationship between the perceived current economic strength of the business and their anticipated capital expenditures in the next 12 months. Half of those who feel their current economic strength is very strong anticipate increasing their capital expenditures. On the other hand, one fourth of those who feel their current economic strength is very weak suggest they will decrease their capital expenditures.

Figure 49: Change in Capital Expenditures by Current Economic Strength of Business

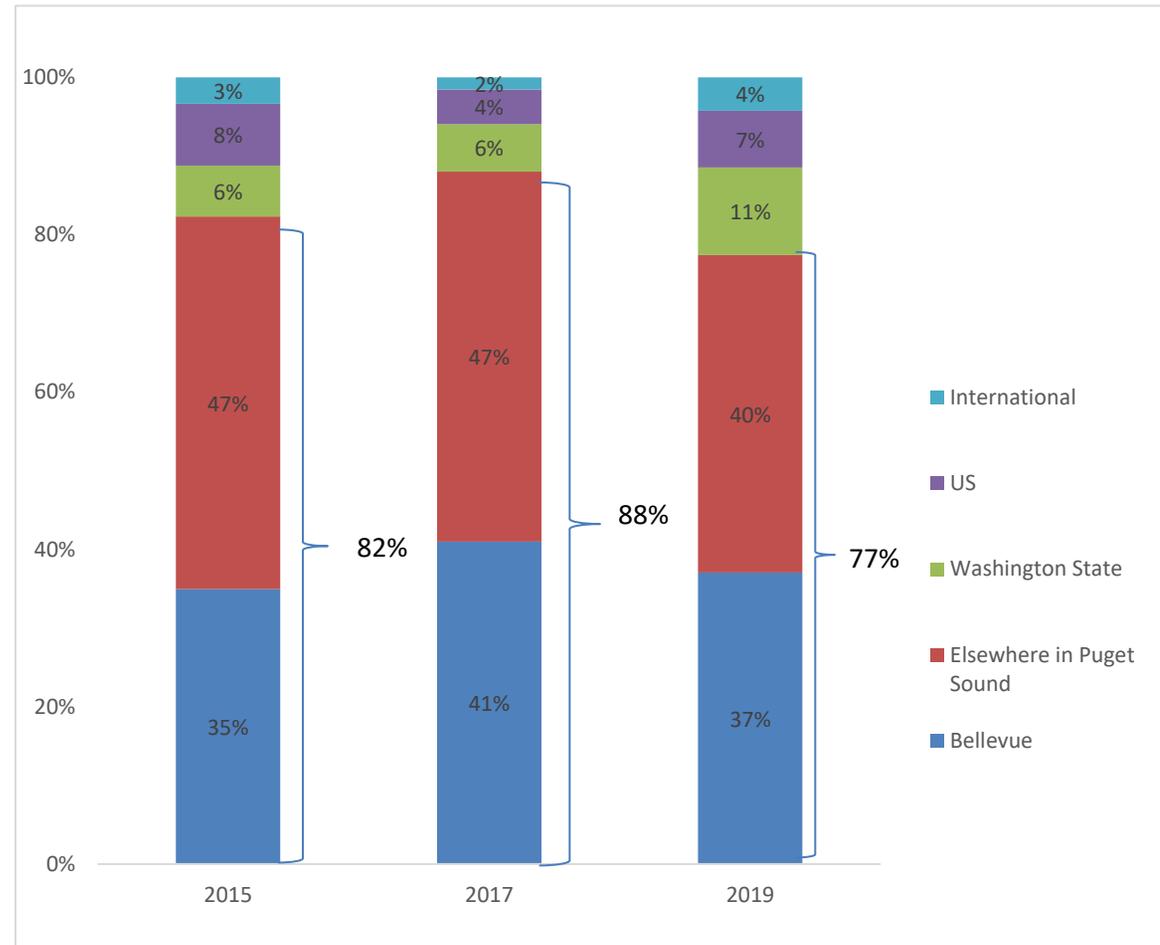


## KEY FINDINGS –EMPLOYEES AND STAFFING

### LOCATION OF EMPLOYEE TALENT POOL

The clear majority of the employee talent pool is in Bellevue or elsewhere in the Puget Sound. While this is true in all years, 2019 sees a decrease in the percentage of employees based locally, notably in terms of the percentage based elsewhere in the Puget Sound region.

Figure 50: Location of Employee Talent Pool

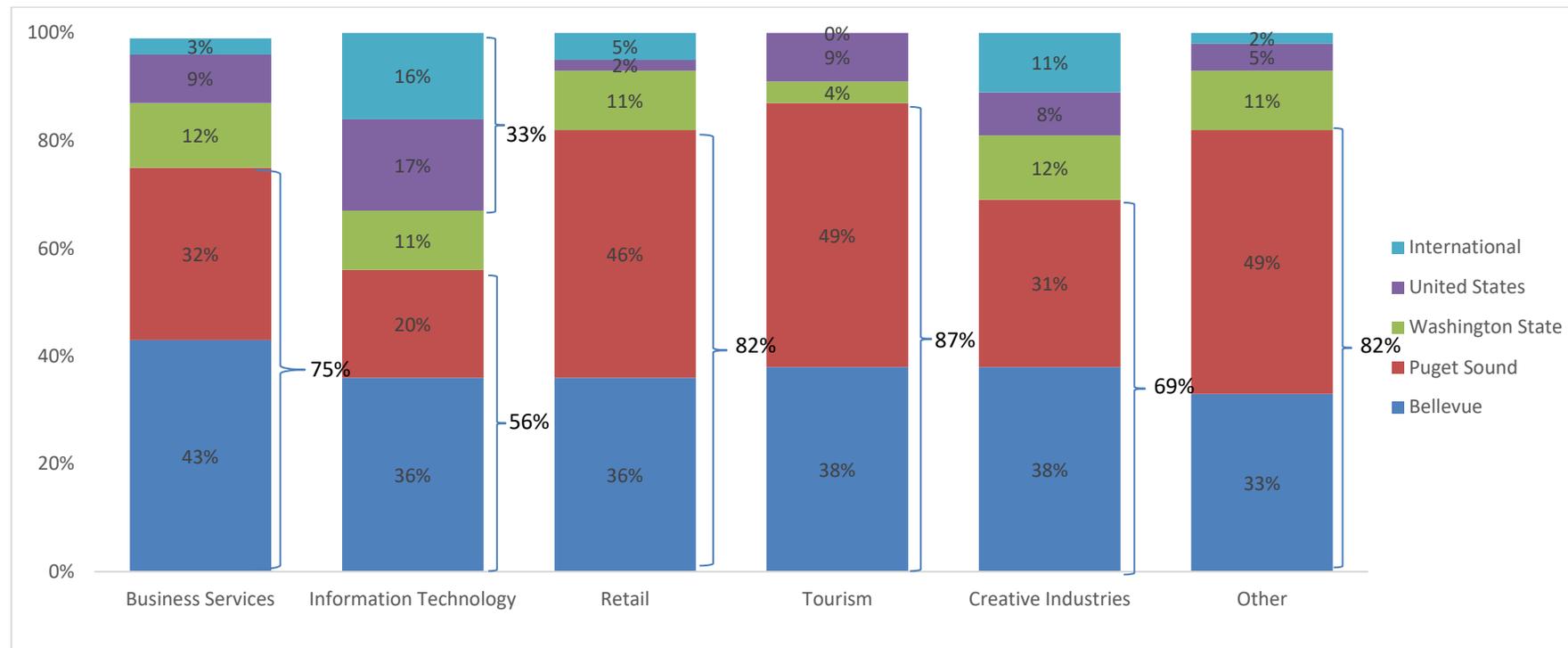


As would be expected, where businesses find their talent pool varies by industry sector.

- While Information Technology businesses currently find the majority their talent in Bellevue or the Puget Sound, they are significantly more likely than other businesses to search nationally and internationally 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 51: Location of Employee Talent Pool—By Sector – 2019 Only



ST3— Where is your employee talent pool located?

Base: All respondents (n=,1025); Business Services (n=300); IT (n=83); Retail (n=92); Tourism (n=48), Creative Industries (n=66), Other (n=436)

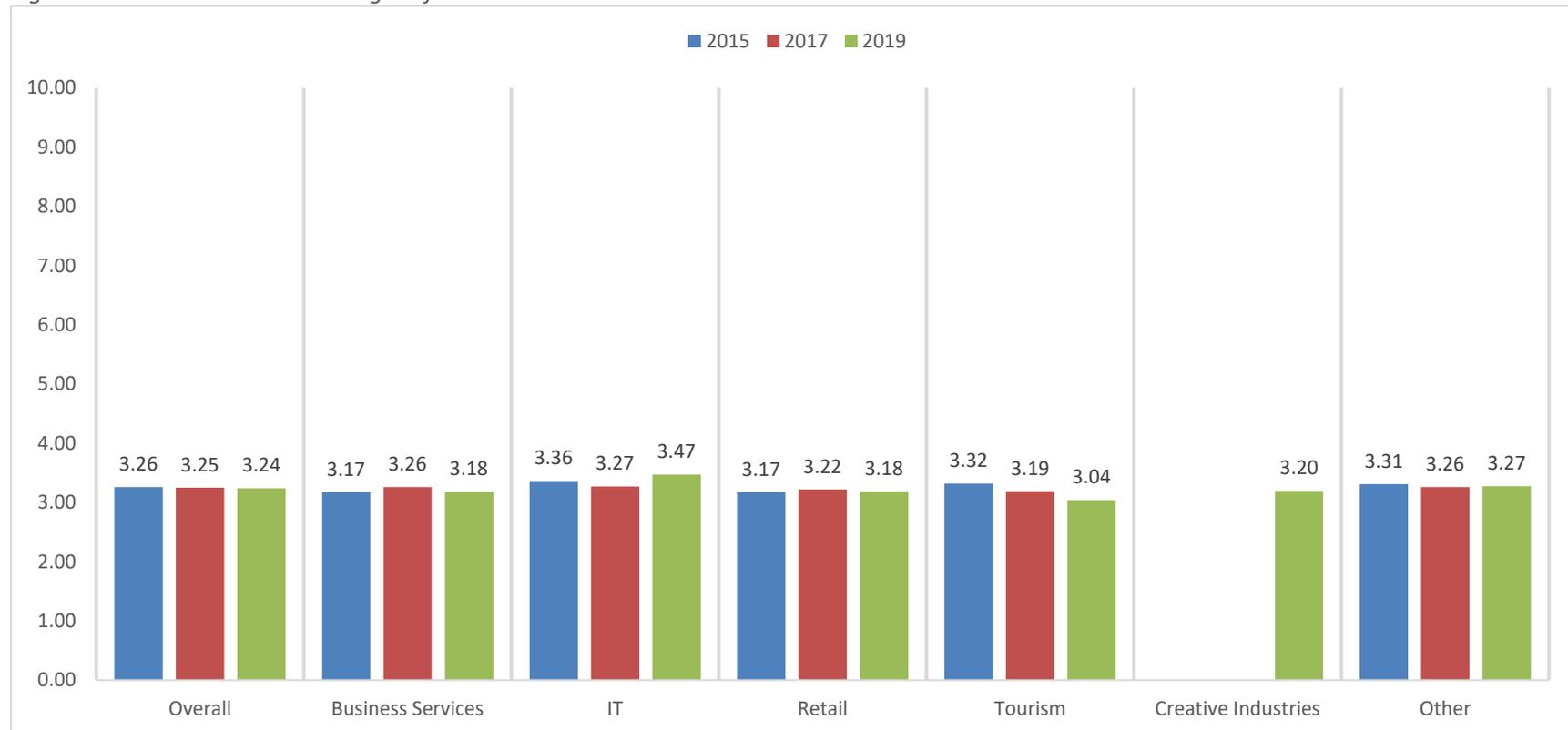
## ANTICIPATED CHANGES TO NUMBER OF BELLEVUE-BASED EMPLOYEES

The majority of Bellevue businesses indicate that there will be no change in the number of Bellevue-based employees they expect to have in the next year.

	2015	2017	2019
<b>Increase</b>	32%	33%	32%
<b>No Change</b>	61%	59%	60%
<b>Decrease</b>	7%	8%	8%
<b>Mean</b>	3.26	3.25	3.24

There has been a steady decrease in the extent to which those in the Tourism sector expect to increase the number of Bellevue-based employees. In 2019, one out of five (19%) Tourism businesses reported that they expected the number of Bellevue-based employees to decrease. At the same time, a nearly equal percentage (25%) felt their number would increase.

Figure 52 Current Economic Strength of Business



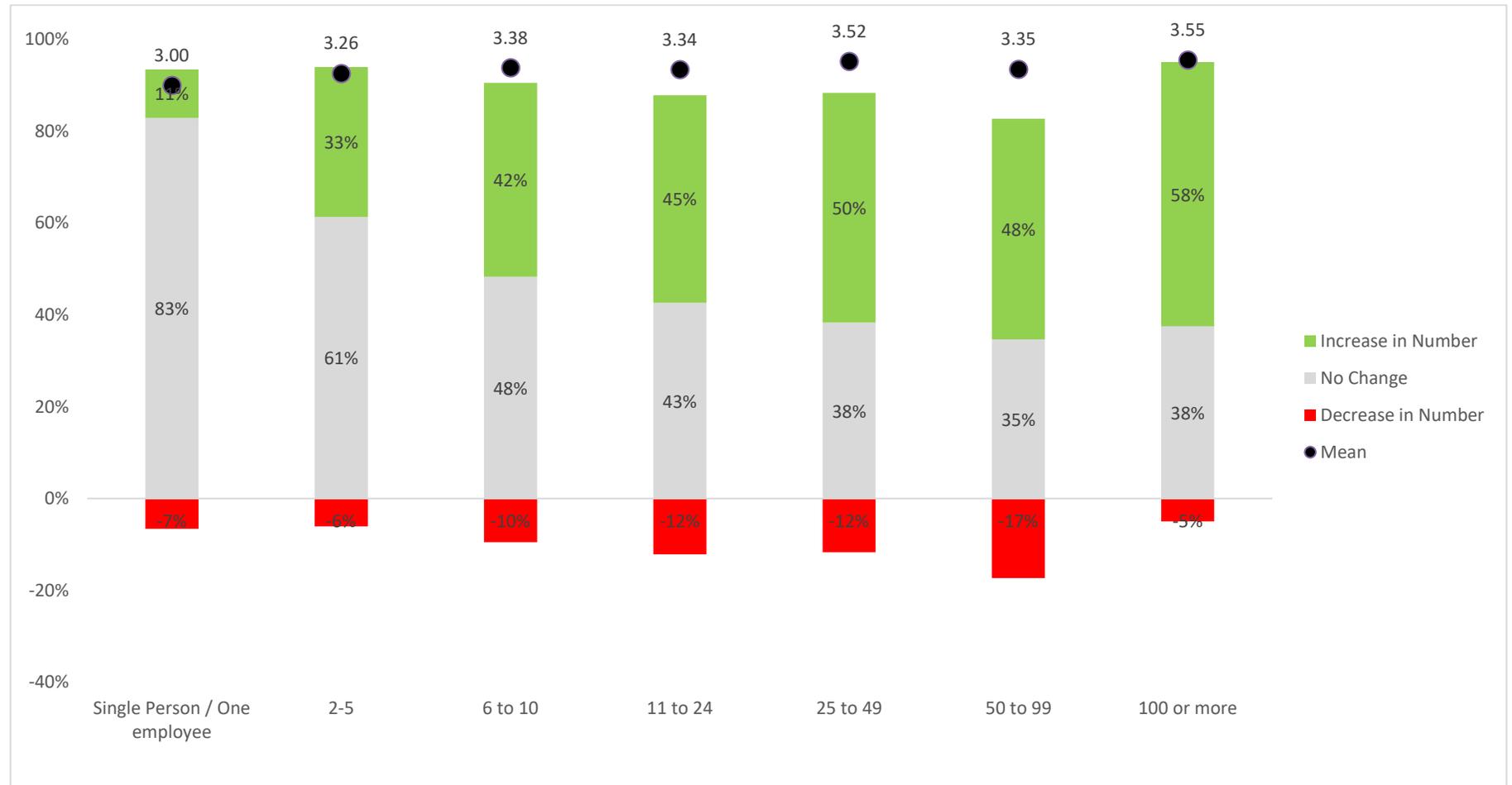
BC4\_1—Please indicate below any anticipated changes to the number of employees based in Bellevue in your business over the next 12 months. .

Base: All respondents (2015=917; 2017=994, 2019=1,025)

Mean is based on a 5-point scale from 1 to 5 where "1 means "significant decrease" and "5" means "significant Increase"

Smaller companies, those with single or one employee and, to a lesser extent, those with two to five employees are the most likely to suggest they anticipate no change in the number of Bellevue-based employees in the next 12 months. Large firms (those with 100 or more employees) and, to lesser extent, mid-sized firms (those with 25 to 49 employees) are the most likely to suggest they will be increasing the number of Bellevue-based employees.

Figure 53: Anticipated Change in Number of Bellevue-Based Employees by Size of Firm (2019 Only)

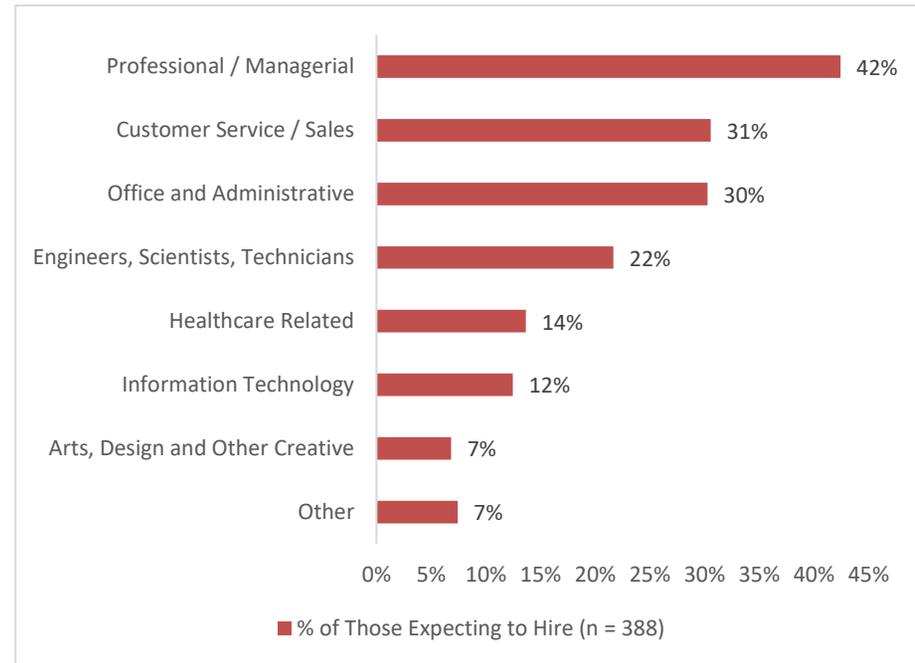


Those expecting to hire additional Bellevue-based employees in the next 12 months (n = 388) were asked two follow-up questions.

### Types of Employees Expecting to Hire

The types of employees expected to be hired varies widely and is largely dependent on industry type.

Figure 54: Types of Employees Expecting to Hire in Next 12 Months



	Business Services (n = 83)	IT (n = 41)	Retail (n = 27)	Tourism (n = 12)	Creative (n = 18)	Other (n = 156)
Professional / Managerial	59%↑	51%↑	15%	33%	44%	37%
Customer Service / Sales	17%	29%	52%↑	83%↑	28%	31%
Office and Administrative	37%	39%	19%	8%	22%	29%
Engineers, Scientists, Technicians	18%	73%↑	11%	8%	33%	12%
Healthcare Related	4%	0%	7%	0%	0%	26%
Information Technology	11%	49%↑	4%	8%	17%	5%
Arts, Design and Other Creative	1%	12%	11%	0%	33%↑	5%
Other	4%	0%	7%	17%	6%	11%

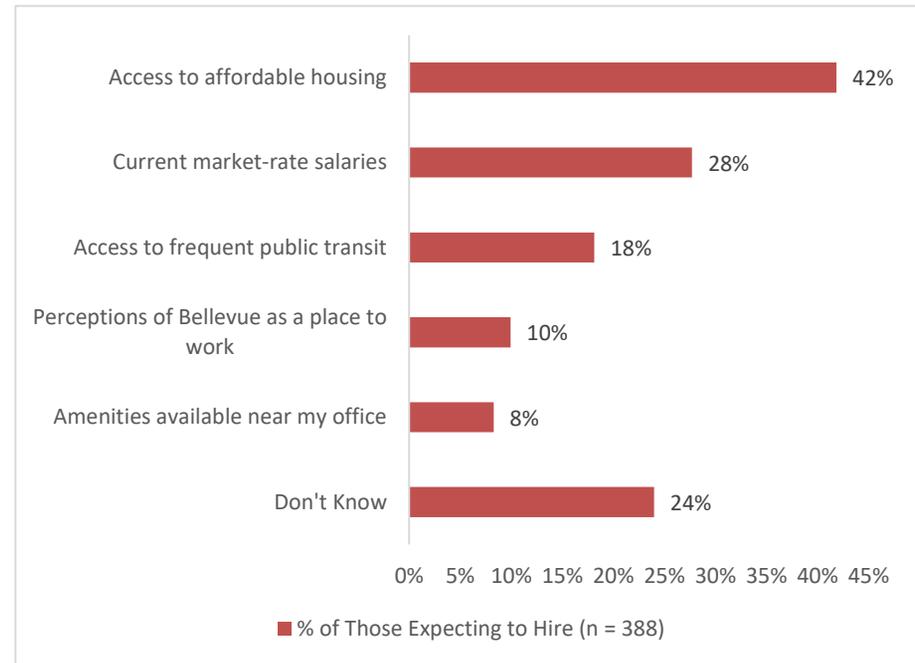
BC5—What type of employees do you intend to hire? Sums to more than 100%, multiple responses

Base: Respondents who anticipate some increase or a significant increase in the number of employees based in Bellevue (2019=388)

### Factors Affecting Ability to Hire / Retain Employees

Access to affordable housing is the most important factor affecting Bellevue businesses ability to hire or retain qualified staff. This is noteworthy for those in the Tourism sector.

Figure 55: Factors Affecting Ability to Hire / Retain Employees



	Business Services (n = 83)	IT (n = 41)	Retail (n = 27)	Tourism (n = 12)	Creative (n = 18)	Other (n = 156)
Access to affordable housing	35%	30%	48%	63%↑	38%	46%
Current market-rate salaries	23%	34%	34%	42%	26%	28%
Access to frequent public transit	18%	22%	16%	25%	14%	18%
Perceptions of Bellevue as a place to work	8%	16%	13%	8%	11%	9%
Amenities available near my office	11%	8%	4%	10%	8%	7%

BC5— Which of the following affected your ability to hire or retain qualified staff in the past 12 months? e? Sums to more than 100%, multiple responses

Base: Respondents who anticipate some increase or a significant increase in the number of employees based in Bellevue (2019=388)

## Anticipated Types of Employees to be Hired

Of businesses anticipating hiring over the next 12 months,

- Nearly half (42%) intend to hire Professional / Managerial,
- Thirty-one percent (31%) are looking to fill Customer Service / Sales roles, and
- Thirty percent (30%) are looking for Office / Administrative staff.

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

### By Sector

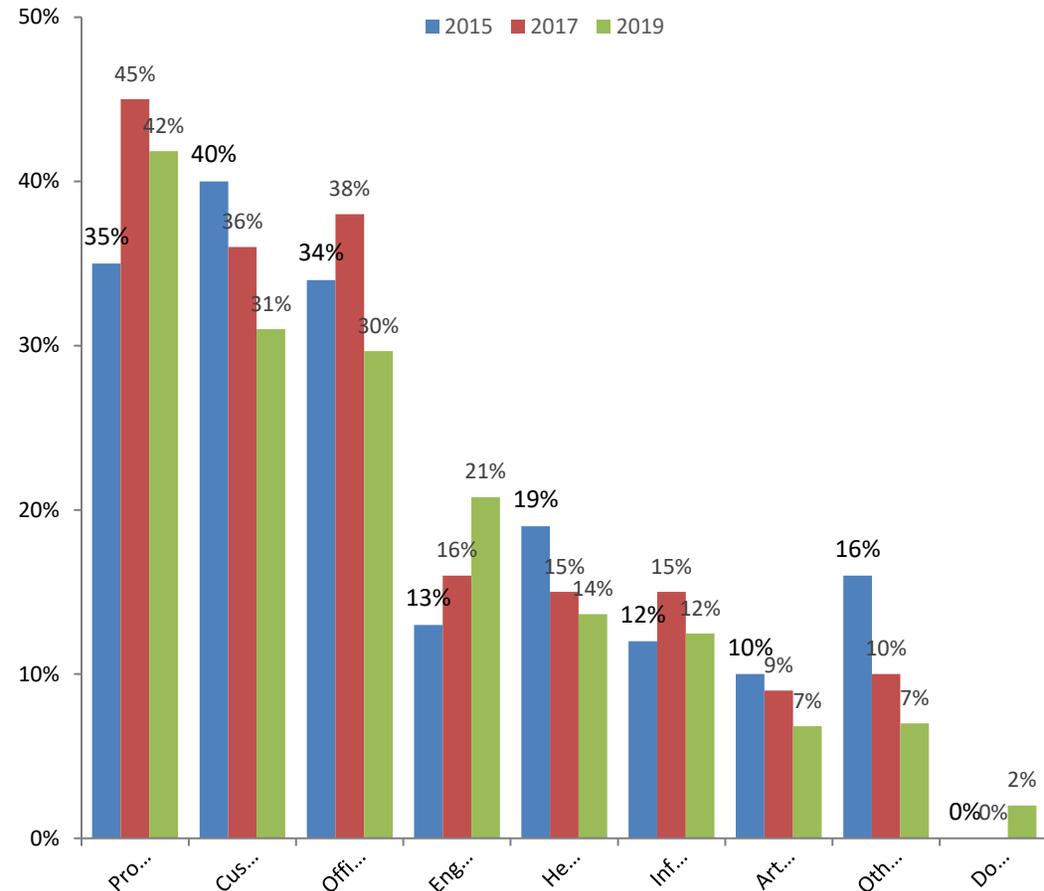
Demand for Professional / Managerial staff is highest among those in the Business Services sector.

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

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

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

Figure 56: Anticipated Types of Employees to be Hired – Year over Year



BC5—What type of employees do you intend to hire?

Base: Respondents who anticipate some increase or a significant increase in the number of employees based in Bellevue (2015=291; 2017=319)

[Blank page inserted for pagination purposes.]

## KEY FINDINGS—BROADBAND INTERNET

### TECHNOLOGY SERVICES SUBSCRIBED TO

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

The incidence of business with landline phones has been dropping and a corresponding increase in Voice Over IP phones has taken its place. The Tourism sector is the most likely to continue to rely on landline telephone service (73% in 2019).

Figure 57: Technology Services Currently Subscribed To – Year over Year

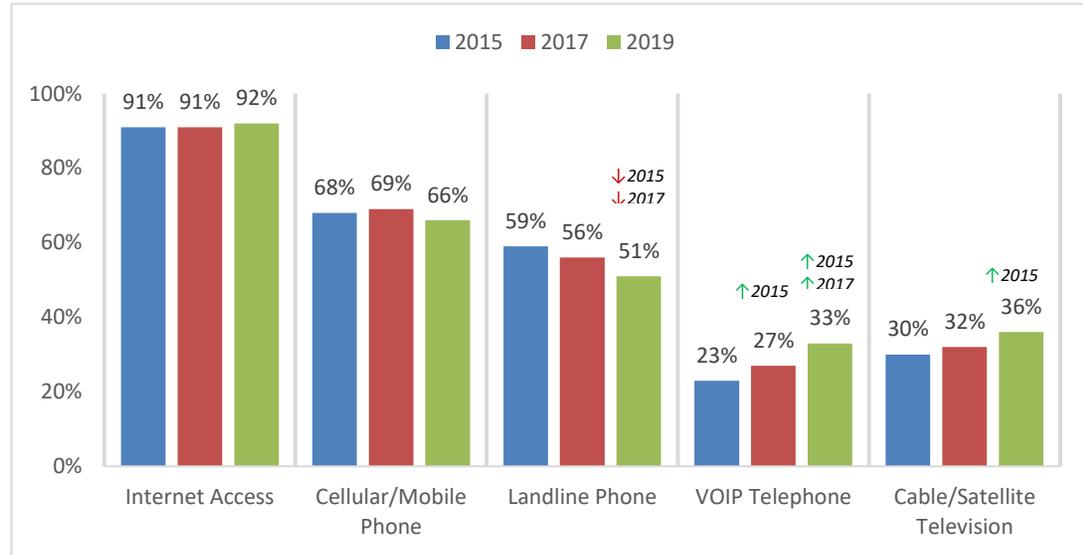
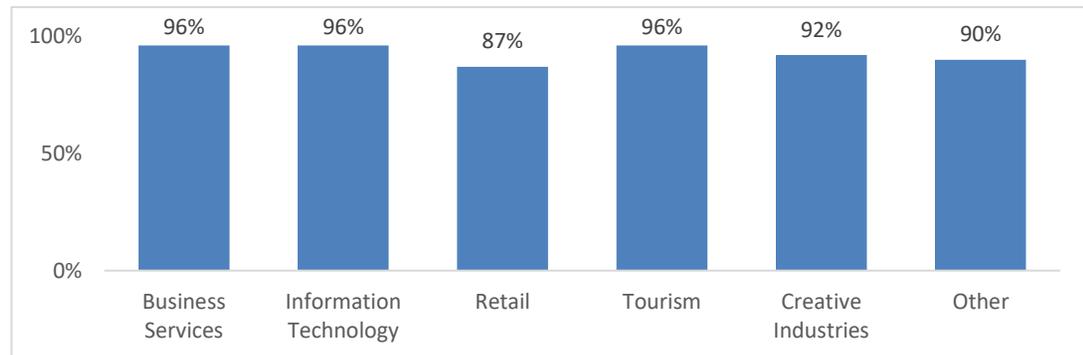


Figure 58: Internet Access by Business Sector – 2019 Only



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

Base: All respondents (2015=917; 2017=994, 2019=1,025) Business Services (n=294); IT (n=85); Retail (n=115); Tourism (n=48), Other (n=452)

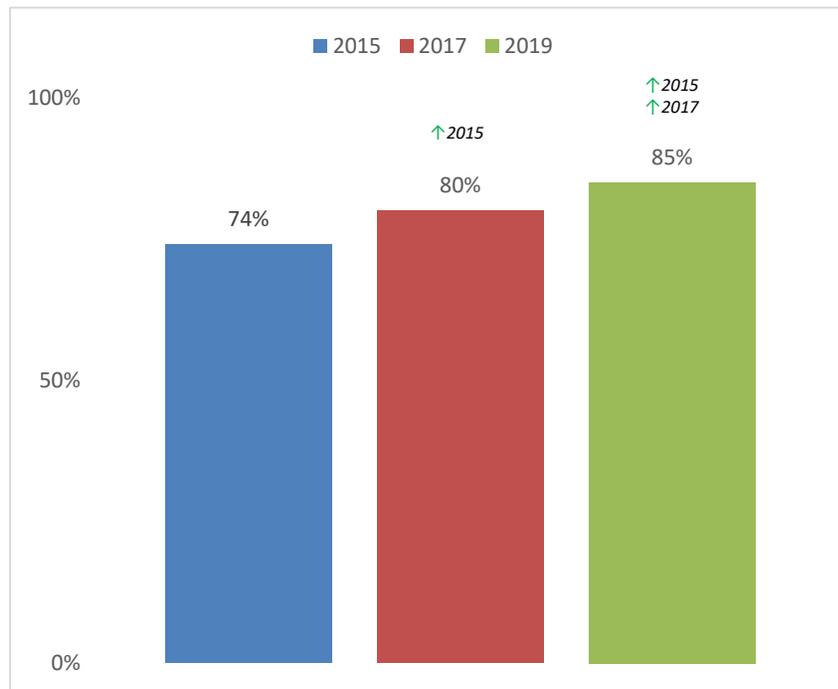
## QUALITY OF INTERNET SERVICE

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

The percentage of businesses who feel that their existing internet speed or bandwidth meets their current needs has been increasing steadily from the 2015. When asked about the next two to three years, nearly three out of four businesses state that their existing internet speed will meet their business needs. This is also significantly higher than previous years.

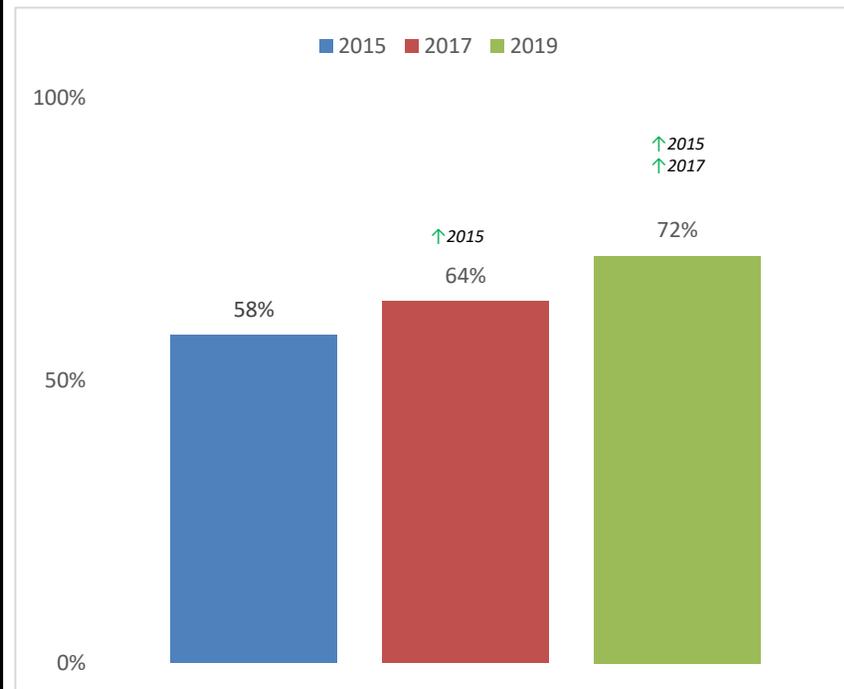
Eighty-five percent (85%) of those who say their existing internet service meets their current needs believe that their future needs will be met as well. On the other hand, one in seven businesses whose needs are currently met feel that future needs will not be adequately met.

Figure 59: Adequacy of Current Internet Service – 2017 to 2019



BB2— Does your existing internet speed/bandwidth meet your current needs?  
Base: Respondents with Internet Access (2015=834; 2017=905; 2019= 943)

Figure 60: Anticipated Adequacy of Future Internet Service – Year over Year



BB3— In the next two to three years, will your existing internet speed meet your business needs?  
Base: Rebased upon all respondents who have internet access (2015=834; 2017=905; 2019= 943). Respondents who indicated internet did not meet current needs were recoded as “no” for meeting future needs here.

## KEY FINDINGS—ADDITIONAL TOPICS

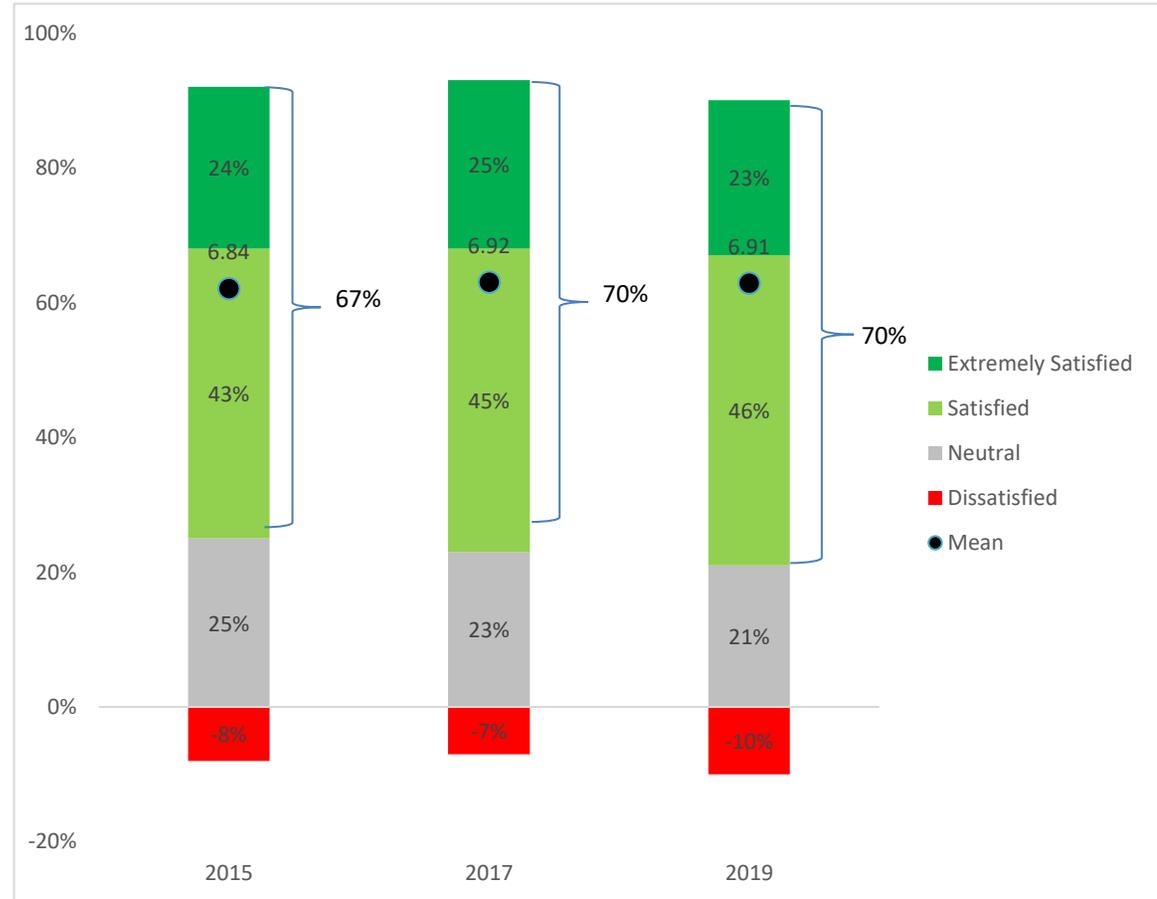
### CUSTOMER SERVICE RELATED TO BUSINESS AND OCCUPATION TAXES

#### All Business / Year-Over-Year

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

These results are consistent across all business sectors, locations, company size, and length of time in business.

Figure 61: Satisfaction Related to Customer Service Dealing with Bellevue Taxes – Year over Year



CC2— How satisfied are you with the customer service you receive when dealing with your Bellevue business Taxes?  
 Base: All respondents (2015=917; 2017=994, 2019=1,025)

## INCENTIVES FOR ALTERNATIVE TRANSPORTATION

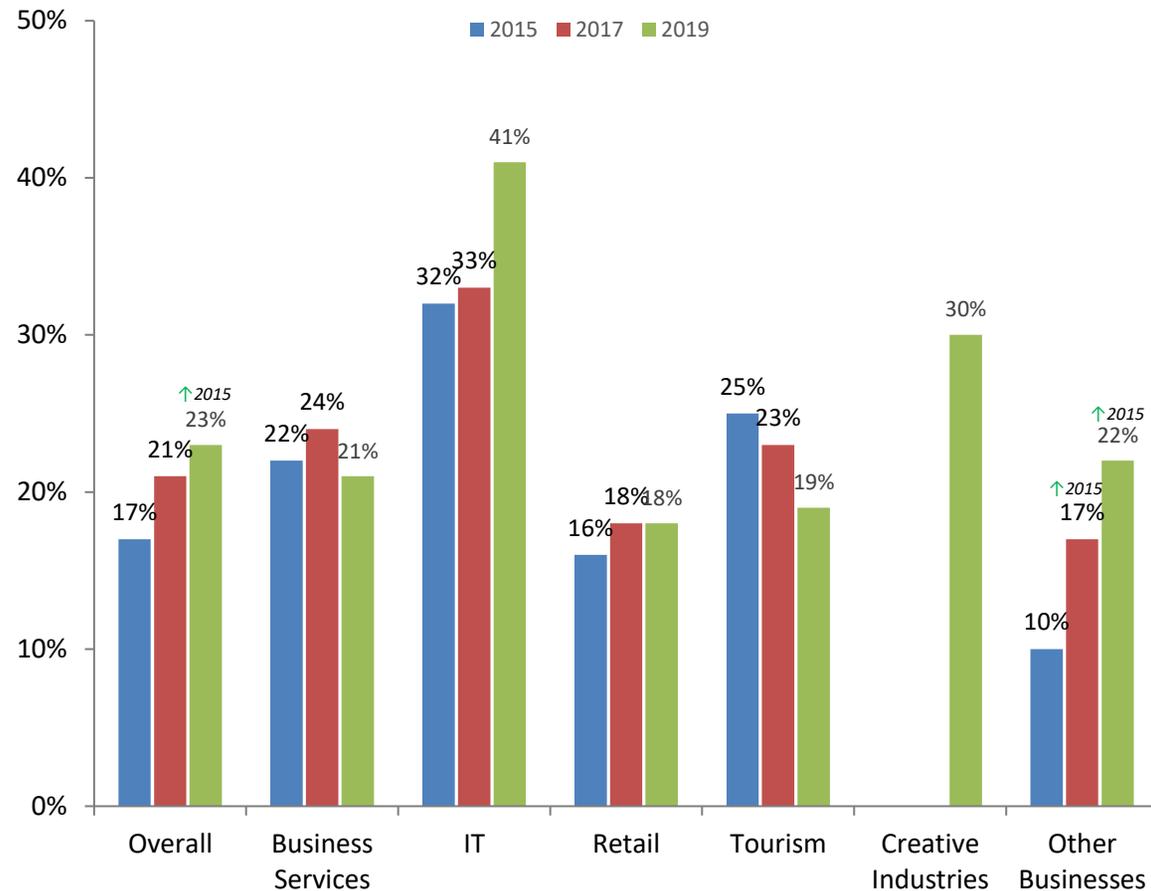
### All Business / Year-Over-Year

Nearly one out of four businesses currently offer an incentive to employees to use alternative transportation modes. This has been increasing over the years.

Information Technology businesses are the most likely to offer incentives to use alternative modes of transportation. The percentage of IT companies offering incentives increased in 2019. This increase, however, is not statistically significant, due in part to the smaller sample size.

The increase is due to year-over-year increases among businesses in “other” sectors and an increase in 2019 among Information Technology businesses. At the same time, businesses in the Tourism sector are less likely to provide incentives for alternative transportation services.

Figure 62: Incentives for Alternative Transportation – Year over Year



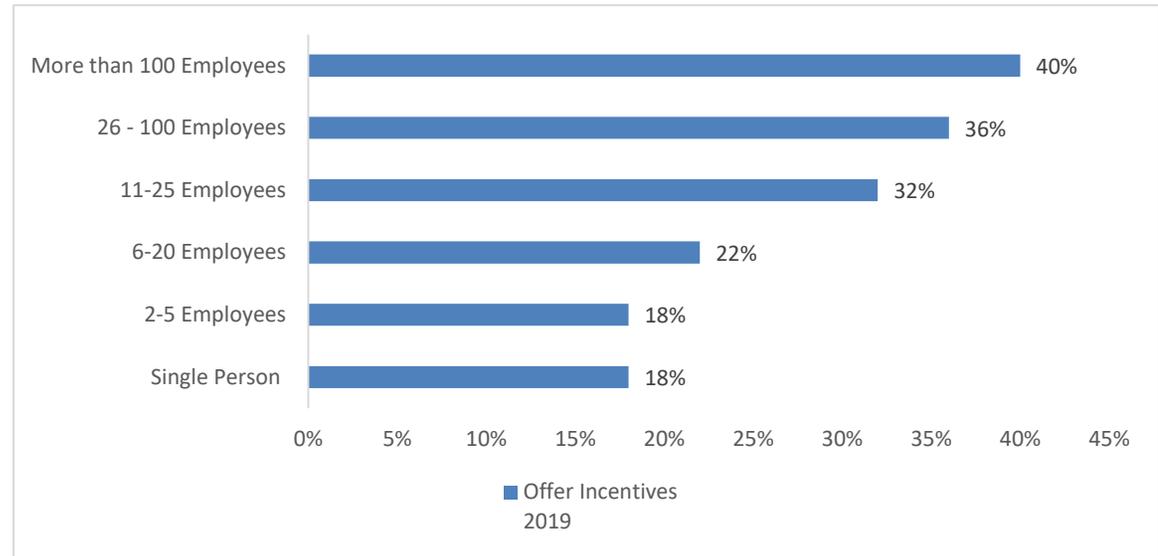
ST1—Does your business offer employees incentives to encourage the use of alternative modes of transportation such as public transit, walking or bicycling?

Base: All respondents (2015=917; 2017=994, 2019=1,025)

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

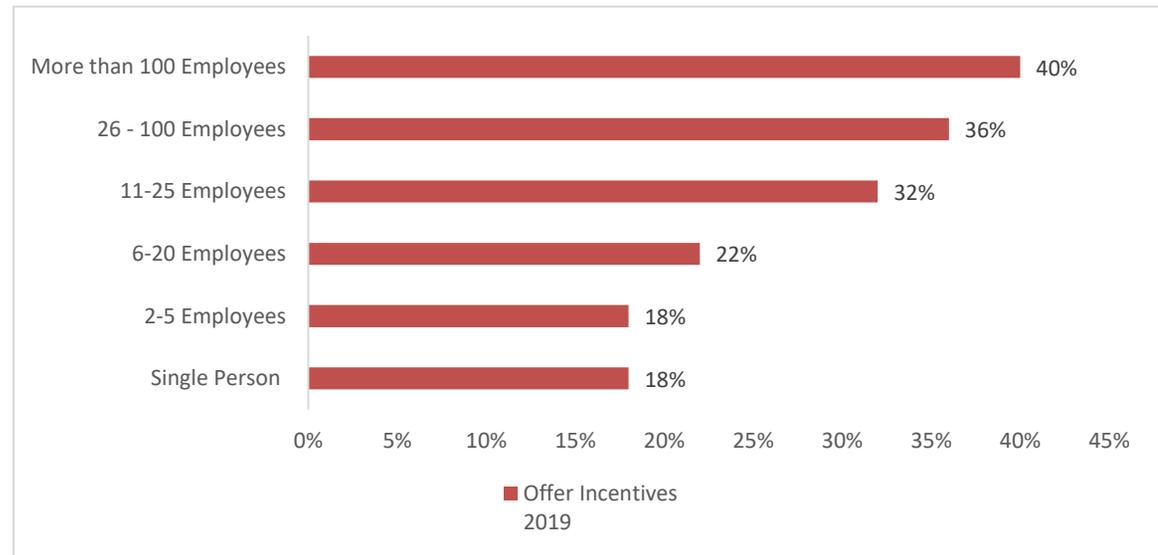
Businesses located downtown are the most likely to offer transportation incentives to their employees. Those located in the SR 520 / BelRed MEC or Outside the MEC are the least likely to do so.

Figure 63: Incentives for Using Alternative Transportation Modes by Location(2019)



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

Figure 64: Incentives for Using Alternative Transportation Modes by Business Size (2019)



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

**All Businesses**

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

**By Sector**

Information Technology businesses are significantly more likely than all other businesses to indicate they may be likely to offer incentives.

**By Location**

Businesses located outside the MEC are the least likely to indicate any future offering of incentives.

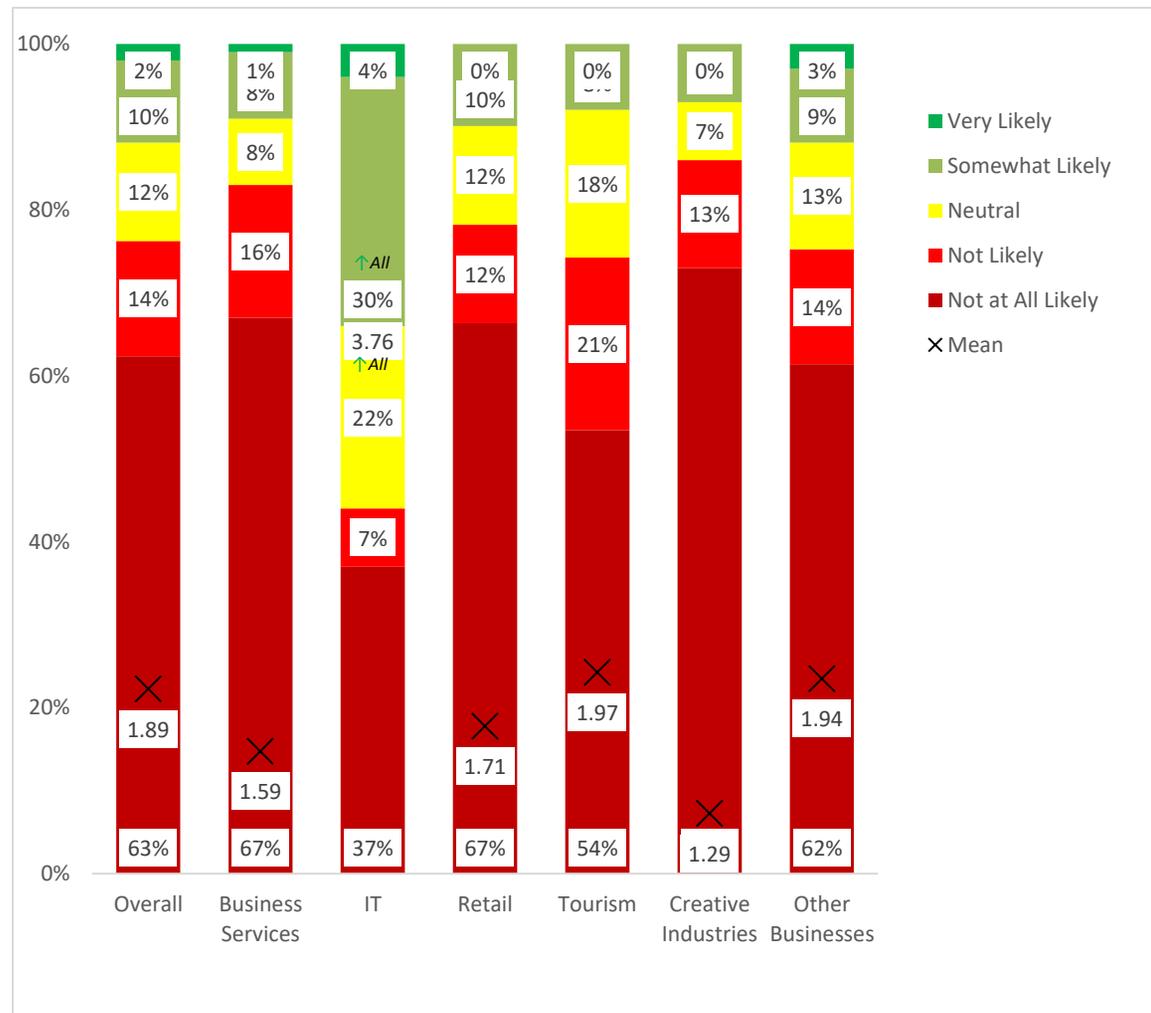
**By Size**

There are no differences *By Size* of business.

**By Business Age**

There are no differences *By Business Age* of business.

Figure 65: Likelihood of Offering Incentives for Alternative Transportation – By Sector – 2019 Only



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

Base: All respondents (2015=917; 2017=994, 2019=1,025)

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

## APPENDIX I—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 8 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			
<b>116<sup>th</sup> / Bellefield</b>	22	46	68	7%	937	6%	7%	11.45%
<b>Crossroads</b>	8	12	20	2%	328	2%	6%	21.27%
<b>Downtown</b>	67	101	168	16%	3,169	20%	5%	7.36%
<b>Eastgate/Factoria</b>	28	44	72	7%	1,172	7%	6%	11.19%
<b>SR 520 / BelRed</b>	105	158	263	26%	3,368	21%	8%	5.80%
<b>Outside MEC</b>	158	276	434	42%	6,920	44%	6%	4.55%
<b>Total</b>	<b>388</b>	<b>637</b>	<b>1,025</b>	<b>100%</b>	<b>15,894</b>	<b>16%</b>	<b>16%</b>	<b>2.96%</b>

[Blank page inserted for pagination purposes.]

## APPENDIX II—AGE AND SIZE OF BUSINESS

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

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

Table 3: Distribution of Completed Surveys – by Business Age (decade founded)

	Completed Surveys				Margin of Error at 95% confidence
	Phone	Web	Total		
<b>Founded prior to 1980</b>	41	43	84	8%	10.66%
<b>Founded in the 1980's</b>	44	47	91	9%	10.24%
<b>Founded in the 1990's</b>	67	109	176	17%	7.35%
<b>Founded in the 2000's</b>	88	165	253	25%	6.11%
<b>Founded in 2010 or later</b>	147	273	420	43%	44.72%
<b>Total</b>	<b>387</b>	<b>637</b>	<b>1,024*</b>	<b>100%</b>	<b>2.96</b>

Table 4: Distribution of Completed Surveys – By Size of Business

	Completed Surveys				Margin of Error at 95% confidence
	Phone	Web	Total		
<b>1 – 5 Employees</b>	187	381	568	58%	4.04%
<b>6 – 49 Employees</b>	151	173	324	33%	5.39%
<b>50 Employees or More</b>	43	51	94	10%	10.08%
<b>Total</b>	<b>381</b>	<b>605</b>	<b>986*</b>	<b>100%</b>	<b>3.96%</b>

\*Total numbers may not match as not all participants answered every business demographics question

[Blank page inserted for pagination purposes.]

[Blank page inserted for pagination purposes.]

[Blank page inserted for pagination purposes.]

## APPENDIX III—QUESTIONNAIRE

### City of Bellevue, 2019 Business Survey TEXT CONVENTIONS

TESTING LINK: [http://survey.confirmit.com/extwix/test\\_p3075308012.aspx?\\_etk=JGZBJHCPFMEN](http://survey.confirmit.com/extwix/test_p3075308012.aspx?_etk=JGZBJHCPFMEN)

**BOLD, PURPLE TEXT DENOTES STYLE-GUIDE INSTRUCTIONS**

**BOLD, RED TEXT DENOTES PROGRAMMING INSTRUCTIONS**

**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"/>	<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"/>	<input type="radio"/>

## INTRODUCTION AND SCREENING QUESTIONS

[BASE: ALL]

---

**[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]**

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

**[ONCE PERSON ON LINE]**

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

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

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

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

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

**[DISPLAY FOR WEB RESPONDENTS ONLY]**

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

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

**SCR1** Does your business have an address in Bellevue?

- 01 YES
- 02 NO **[SKIP TO THANK1]**
- 999 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 DON'T KNOW
- 999 PREFER NOT TO ANSWER

**“OVERALL RATINGS**

**[BASE: ALL]**

**BNWRG2** From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue as a place to operate a business? Use a scale from 0 to 10 where “0” means “Significantly worse than other cities and towns” and “10” means “Significantly better than other cities and towns.”

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 DON'T KNOW / NOT FAMILIAR WITH OTHER CITIES AND TOWNS
- 999 PREFER NOT TO ANSWER

**BNWRG3** Using a scale from 0 to 10 where “0” means “Does not meet expectations at all” and “10” means “Greatly exceeds expectations,” how would you rate the overall quality of services provided to businesses by the City of Bellevue?

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

- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

**BNWRG4\_1** Using a scale from “0” to “10” where “0” means “Strongly headed in the wrong direction” and 10 means “Strongly headed in the right direction,” overall, would you say that Bellevue is headed in the right or wrong direction?

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

- 998 DON'T KNOW
- 999 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]**

- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

BNWRG6 Think about the taxes you pay in Bellevue and the services you receive from the City. Using a scale from 0 to 10 where “0” means “Very poor value” and “10” means “Excellent value,” what value do you feel you receive for your money?

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

- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

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

- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

## COMMUNITY CHARACTERISTICS

[BASE: ALL]

**CC1\_INT** From what you have experienced, seen, or heard, compared with other cities and towns, how would you rate Bellevue on each of the following items? Use a scale from 0 to 10 where “0” means “Significantly worse than other cities and towns” and “10” means “Significantly better than other cities and towns.”

[RANDOMIZE ORDER SHOWN CC1\_1 THORUGH CC1\_12]

<b>CC1_1</b>	Physical appearance of the area where your business is located
<b>CC1_2</b>	Development services related to permitting and licensing
<b>CC1_3</b>	Utility costs
<b>CC1_4</b>	Extent to which vehicle traffic affects your business
<b>CC1_5</b>	Access to public transportation services
<b>CC1_6</b>	Parking availability for employees
<b>CC1_7</b>	Ability to safely get around town by walking or biking
<b>CC1_8</b>	Availability of qualified employees that fit the needs of your business
<b>CC1_9</b>	Access to continuing education opportunities
<b>CC1_10</b>	Overall feeling of safety
<b>CC1_11</b>	Quality of Police and Emergency Medical Services
<b>CC1_12</b>	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 DON'T KNOW

999 PREFER NOT TO ANSWER

**CC3\_INT** Using the same scale, how would you rate Bellevue in terms of access to each of the following items.

Access to...

<b>CC3_1</b>	Capital to grow your business
<b>CC3_3</b>	Incubators
<b>CC3_4</b>	Affordable office, industrial, or other working spaces
<b>CC3_6</b>	Businesses organizations or business service providers
<b>CC3_7</b>	Support services for new businesses

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 DON'T KNOW

999 PREFER NOT TO ANSWER

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

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

997 DOES NOT APPLY / HAVE NOT DEALT WITH CUSTOMER SERVICE

998 DON'T KNOW

999 PREFER NOT TO ANSWER

**BUSINESS CLIMATE**

[BASE: ALL]

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

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

- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

**BC6** Now, using a scale from 0 to 10 where “0” means “Not at all likely” and “10” means “Extremely likely,” how likely would you be to recommend Bellevue as a vibrant arts and cultural destination?

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

- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

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

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

- 998 DON'T KNOW
- 999 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 DON'T KNOW
- 999 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 DON'T KNOW

999 PREFER NOT TO ANSWER

### WORKFORCE DEVELOPMENT

**[BASE: BUSINESSES EXPECTING AN INCREASE IN NUMBER OF BELLEVUE-BASED EMPLOYEES 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 DON'T KNOW
- BC5#999 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 DON'T KNOW
- 999 PREFER NOT TO ANSWER

**ST8** Have any of the following affected your ability to hire or retain qualified staff in the past 12 months?

**[MULTIPLE SELECT]**

- 01 Access to frequent public transit
- 02 Access to affordable housing
- 03 Current market-rate salaries
- 04 Perceptions of Bellevue as a place to work
- 05 Amenities available near my office (such as food, public space, etc.)
- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

### BROADBAND FOR BUSINESS

**[BASE: ALL]**

---

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

**[MULTIPLE SELECT]**

- 01 Internet Access
- 02 Cable or satellite television
- 03 Fixed (landline) telephone service
- 04 Cellular/mobile telephone service
- 05 V-O-I-P telephone service
- 06 NONE OF THE ABOVE
- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

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

- 01 YES
- 02 NO
- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

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

- 01 YES
- 02 NO
- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

**SPECIAL TOPICS**

[BASE: ALL]

**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
- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

**ASK ST1A IF ST1=02 (NO)**

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

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

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

**ST9** Where do you sell your goods and services?

**[SELECT ALL THAT APPLY]**

**(READ LIST IF NECESSARY)**

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

**ASK ST9A IF ST9=05 (INTERNATIONALLY)**

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

**[SELECT ALL THAT APPLY]**

- 01 Asia
- 02 North America
- 03 South America
- 04 Africa



- 05 Europe
- 06 Australia / Oceania
- 07 Other (specify) \_\_\_\_\_
- 998 DON'T KNOW
- 999 PREFER NOT TO ANSWER

**ST10** Where are the majority of your suppliers located?

- 01 Bellevue
- 02 Elsewhere in the Puget Sound region
- 03 Washington State
- 04 Nationally / Other US States
- 05 Internationally
- 998 DON'T KNOW
- 999 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 Access to talent/qualified employees
- 03 Transportation
- 04 Internet Access/ Broadband Connectivity
- 05 Business regulations
- 06 Business and Occupation Tax
- 07 Environment
- 08 International trade environment
- 888 Other **(SPECIFY)**
- 998 DON'T KNOW
- 999 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 . . .

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

## ADVOCACY

[BASE: ALL]

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

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

998 DON'T KNOW

999 PREFER NOT TO ANSWER

## BUSINESS DEMOGRAPHICS

[BASE: ALL]

**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?  
[MULTIPLE SELECT]

01 OWN

00 LEASE

998 DON'T KNOW

999 PREFER NOT TO ANSWER

**DEMO3A** Not including this location, how many other locations does your business have?

\_\_\_\_ ENTER NUMBER

998 DON'T KNOW

999 PREFER NOT TO ANSWER

ASK DEMO4 IF NAICS\_DESCRIPTION=999

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

Goods Producing		Service Providing	
01	Construction	04	Finance & Insurance
02	Manufacturing	05	Healthcare
95	Other <b>(Specify)</b>	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 <b>(SPECIFY)</b>

**DEMO5**

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

- \_\_\_ Full-Time
- \_\_\_ Part-Time
- \_\_\_ Contractors
- \_\_\_ Other
- 998 DON'T KNOW
- 999 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.*