



## 2016 Budget, Performance, and Business Survey Survey Highlights

### **Budget and Performance Surveys**

The Budget and the Performance Measures Surveys are designed to provide statistically valid tools to enhance the city's knowledge of Bellevue residents' perceptions of the City and to better understand community priorities for and expectations regarding City services. They are part of the greater framework for informing city decisions and direction.

The margin of error for both of these surveys is generally no greater than plus or minus 4.9 percentage points at a 95 percent confidence level.

The City of Bellevue's Budget Survey has been performed on a biennial basis since 1998. The 2016 survey was conducted between February 1 and March 3 2016, using a mixed-mode address-based methodology. This approach yielded a total of 443 total interviews—137 completed over landline, 111 via cell phone and 195 via the Web.

The Performance Measures Survey is conducted annually to gauge residents' satisfaction and/or expectations relating to City services. Findings contribute to budget performance measures, ICMA Comparable Cities reporting (survey measures identified by the International City/County Management Association), and certain survey measures that departments track for their own quality assurance and planning purposes. This is the 18th Performance Measures Survey conducted by the City.

### **Business Survey**

The Business Survey was conducted for the first time in 2015 and should be considered baseline data. The survey is an important part of the city's Business Retention Program (BRE). The goal of the BRE is to develop and promote a healthy and vibrant business climate in Bellevue. The survey utilized a list of businesses provided by the Washington State Department of Revenue. In all, approximately 8% of all 11,443 businesses were interviewed. We intend to conduct the survey every two years.

The pages that follow includes sections from the Budget, Performance and Business Surveys.

## 2016 Budget, Performance, and Business Survey Survey Highlights

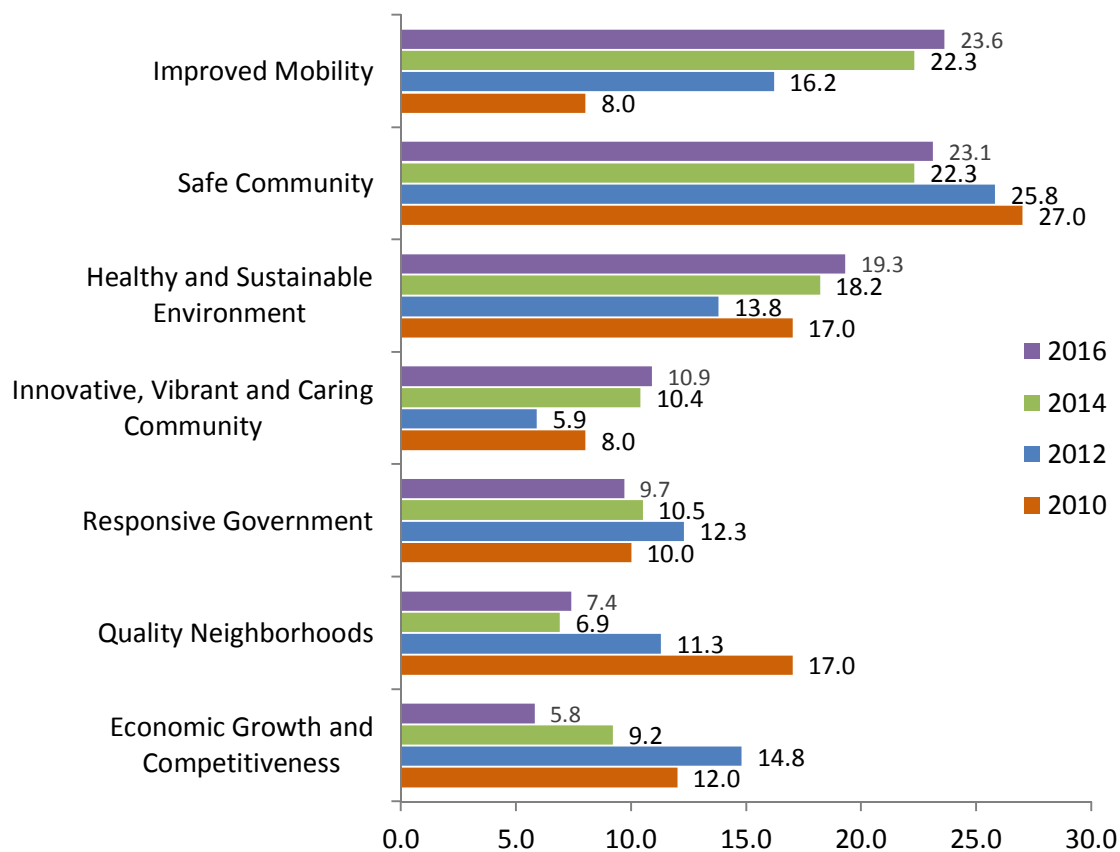
### Budget Survey Highlights

Following are highlights from this survey. The full report will be available on the City website by the beginning of April 2016.

### 2016 Budget Priorities:

Utilizing MaxDiff (an analytical tool that allow one to identify the best of many alternatives), respondents were asked in a series of 8 queries to identify most important and least important City service area priorities. The following graph provides results and comparison to previous surveys.

**2016 Budget Priorities**

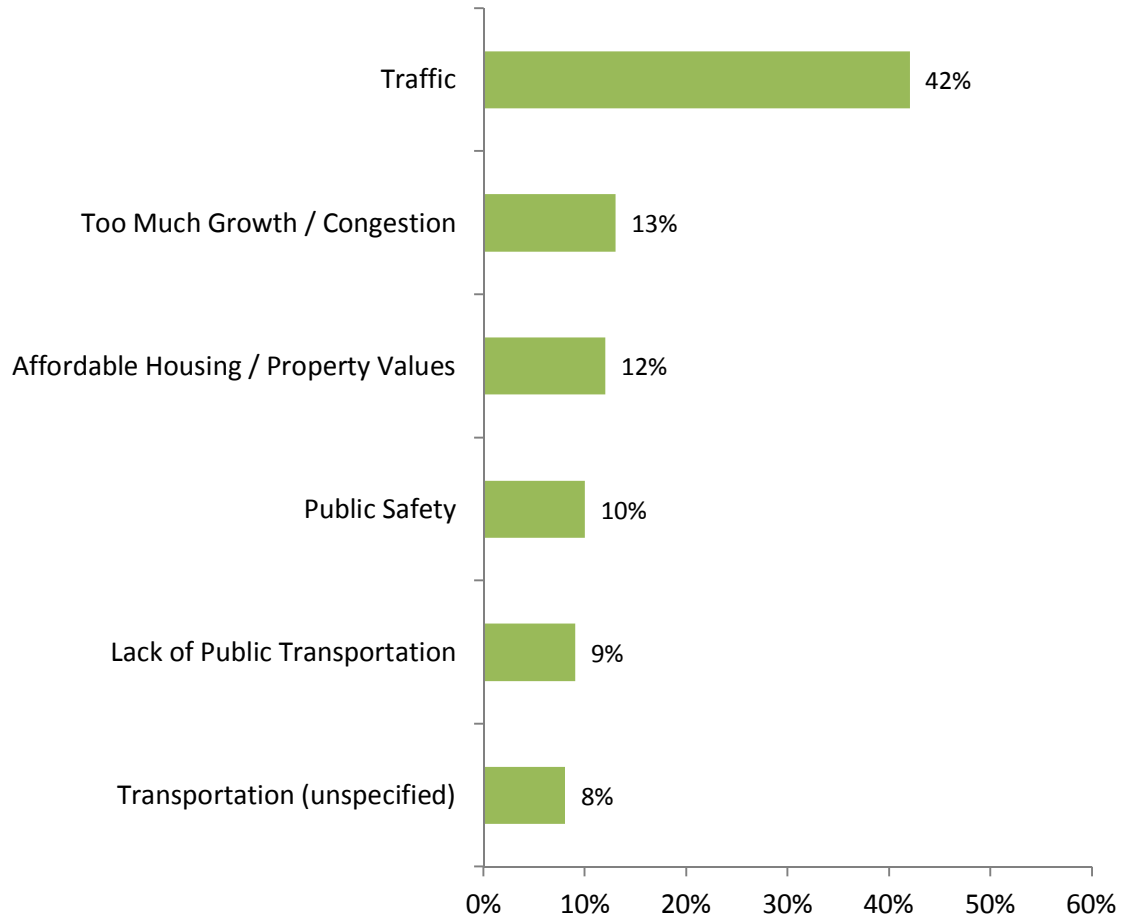


- Prioritization of improved mobility has increased every survey cycle from 2010 and is now the top overall budget priority for the first time.
- Safe community still remains high but has decreased significantly in 2014 and has not changed in 2016.
- Healthy and sustainable environment as well as responsive government and innovative, vibrant, and caring Community have returned to near 2010 levels.
- Economic growth and competitiveness has declined each year from 2012 and is the lowest priority.

## 2016 Budget, Performance, and Business Survey Survey Highlights

### Biggest Problem Facing Bellevue

#### Top Five Mentioned Biggest Problems Facing Bellevue



## 2016 Budget, Performance, and Business Survey Survey Highlights

### Taxes and Funding of City Services and Facilities

The question was revised in 2016 and respondents were asked to pick from four statements that more accurately reflect the real-world issues the City faces. In previous surveys, respondents had the choice of (1) increase taxes and services (2) keep taxes and services about the same or (3) decrease taxes and services.

Responses over the years remained about the same: About three-quarters of respondents choose to keep taxes and services about the same. The remaining respondents were nearly equally split between increases and decreases taxes and services.

In the revised question, respondents were asked: *“Considering all city services on the one hand and taxes on the other, which of the following statements comes closest to your view?”*

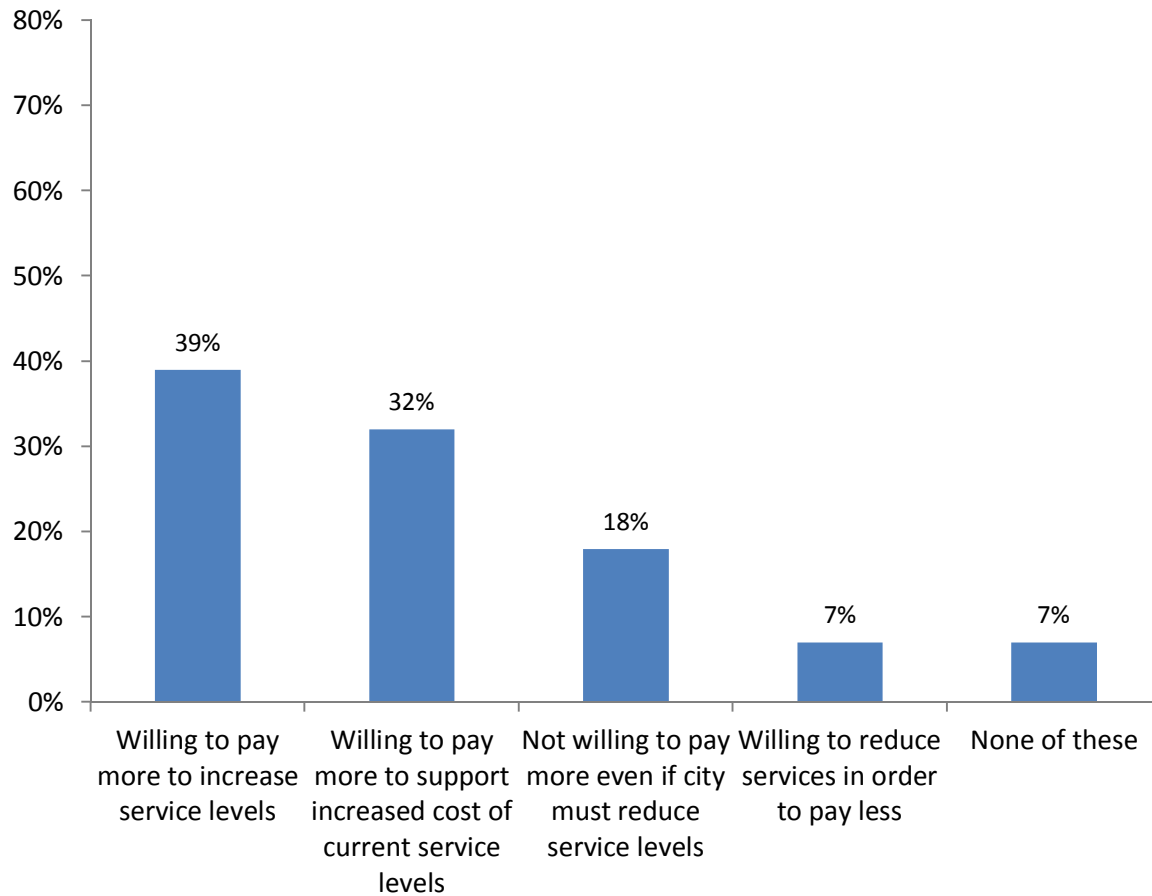
1. I am willing to pay more in taxes only if it will result in an increase in the level of services.
2. I am willing to pay more in taxes if it is necessary to support the increased costs of providing the current levels of service.
3. I am willing to have the City reduce the level of services currently provided if it means my property taxes would be lower.
4. I am not willing to pay more taxes than I currently do even if it means the city must reduce services due to increased cost of providing the current levels of services.

The chart on the following page displays the in order the numbering of the response choice above:

The 2016 change in response options provides more insight into what residents choose and the results

- 39% of respondents say they are willing to pay taxes to increase services
- 32% of respondent say they are willing to pay more taxes to support increased costs of delivering current services
- 18% are unwilling to pay taxes even if it means the city must reduce services
- 7% of respondents are willing to reduce services to reduce their taxes

## 2016 Budget, Performance, and Business Survey Survey Highlights



## 2016 Budget, Performance, and Business Survey Survey Highlights

### Quadrant Analysis

A Quadrant Analysis was done to identify how best to allocate resources across 38 service areas based on what is most important to residents and their relative satisfaction with city services.

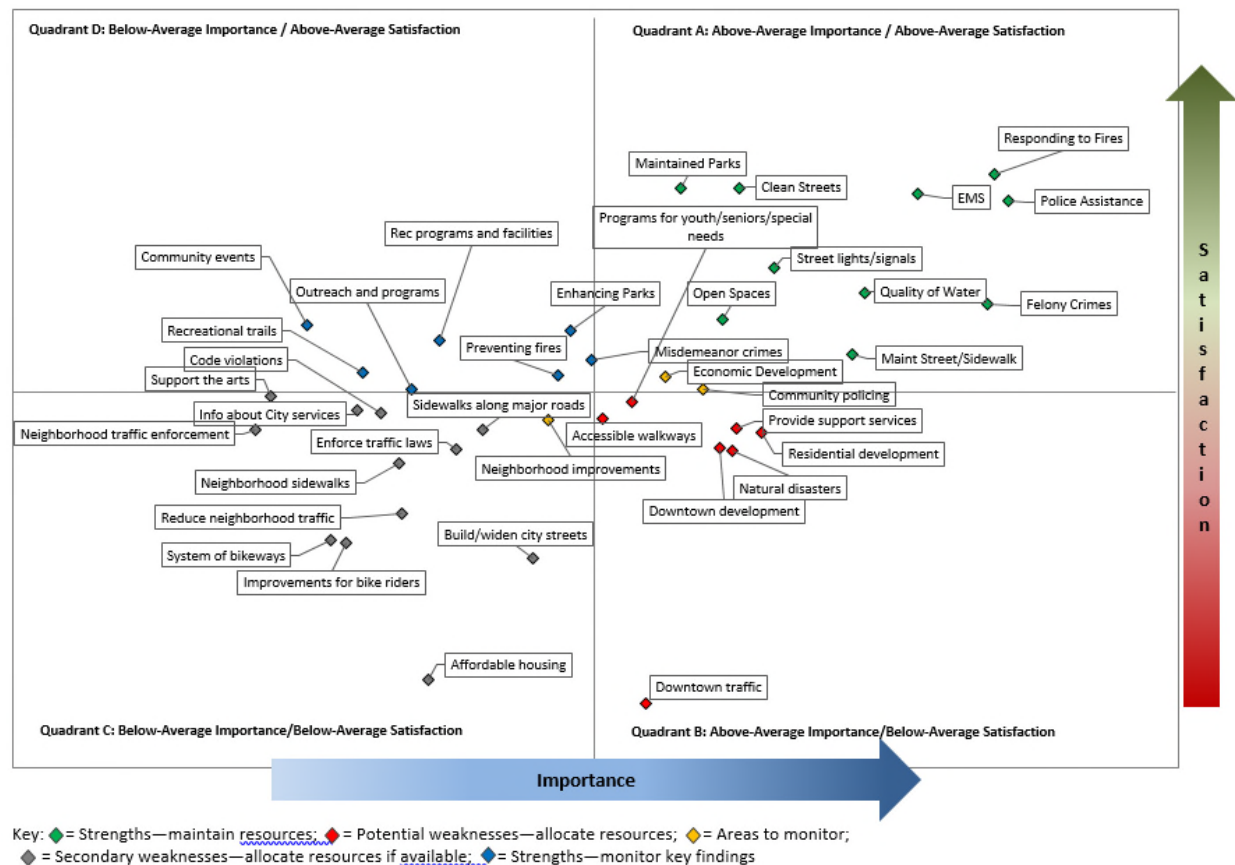
Services in Quadrant A are above average in both importance and satisfaction. They are Bellevue's greatest strengths.

Quadrant B contains services that are also of above-average importance. However, current perceptions relating to satisfaction are that these services are below average.

Quadrant C contains services for which current perceptions of service importance and satisfaction are below average.

Quadrant D contains those elements of service for which current perceptions of service are above average but less important to citizens. Like Quadrant A, this quadrant also represents Bellevue's strengths.

Figure 13: Quadrant Analysis



## 2016 Budget, Performance, and Business Survey Survey Highlights

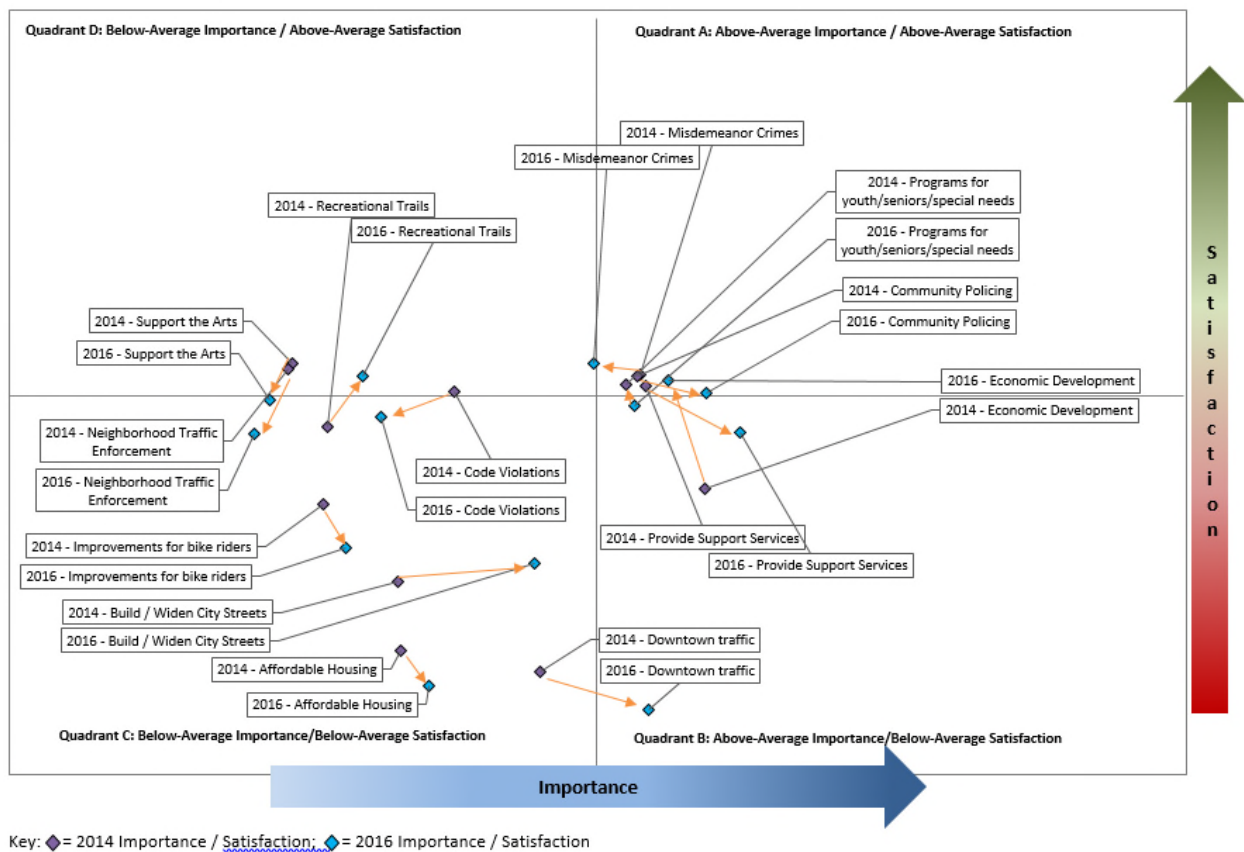
### Quadrant Analysis: Key Changes from 2014 to 2016

The analysis below shows the movement from 2014 to 2016 relating to shifts in importance/satisfaction. The data points below show (1) movement from one quadrant to another or (2) a shift in relative importance/satisfaction within a quadrant.

For example, Downtown traffic moved from Quadrant C to Quadrant B – shifting in both importance and satisfaction. Respondents opined that *Downtown traffic* has become more important in 2016 while being less satisfied with the state of *Downtown traffic* compared to 2014.

A second example shows a shift within a quadrant. In “Quadrant C: Below- Average Importance/Below Average Satisfaction”, *Affordable Housing* become more important in 2016 with relatively less satisfaction than in 2014 in the opinion of respondents.

Figure 13: Quadrant Analysis – Key Changes from 2014 to 2016



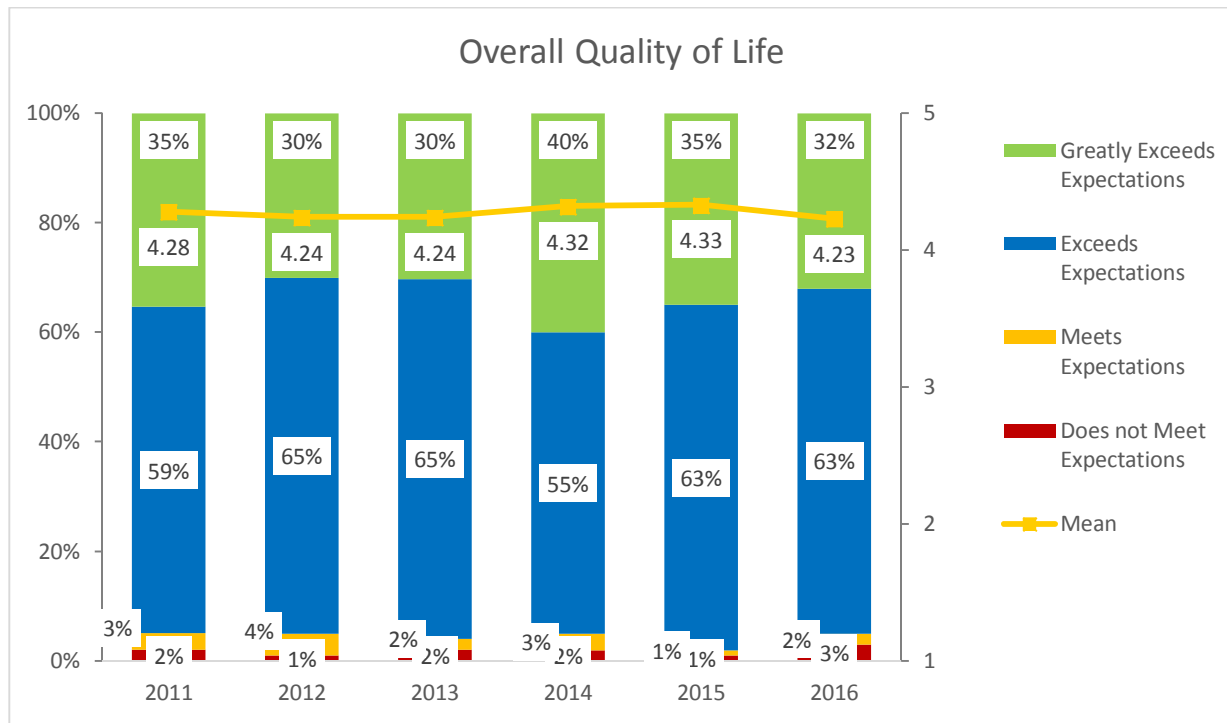
## 2016 Budget, Performance, and Business Survey Survey Highlights

### Performance Survey Highlights

Following are highlights from this survey. The full report will be available on the City website by mid-April 2016

#### Overall Quality of Life:

Respondents were asked: *How would you rate the overall quality of life in the City of Bellevue?* The following graph provides results and comparison to previous surveys.



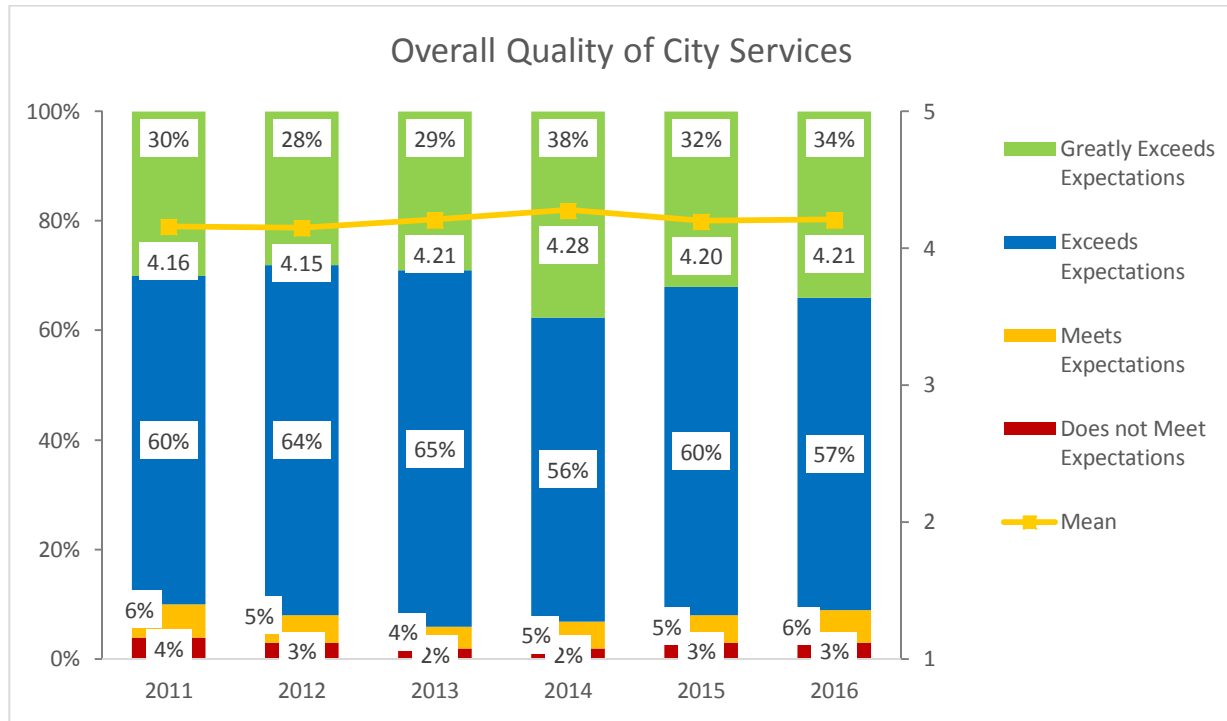
- Nearly all residents (95%) feel that the overall quality of life in Bellevue exceeds or greatly exceeds their expectations.
- The percent of residents who say Bellevue Exceeds or Greatly Exceeds their expectations has remained relatively steady over the past several years.



## 2016 Budget, Performance, and Business Survey Survey Highlights

### Overall Quality of City Services:

Respondents were asked: *How would you rate the overall quality of services provided by the City of Bellevue?* The following graph provides results and comparison to previous surveys.

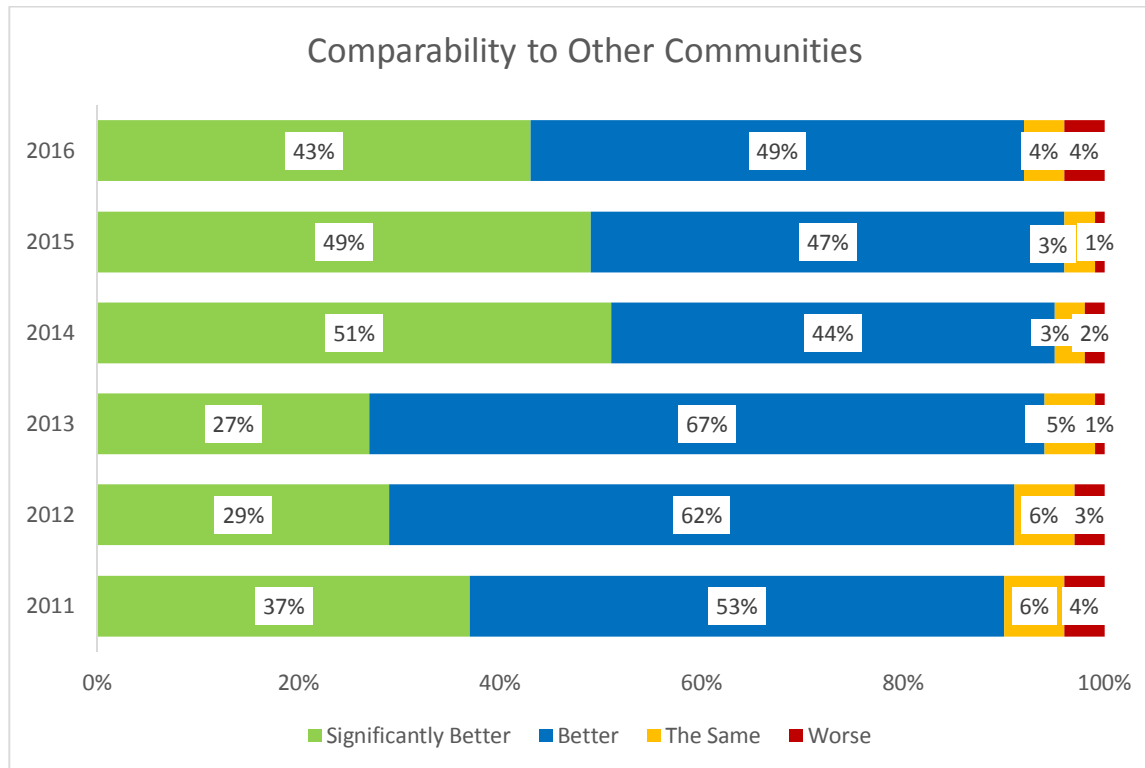


- 91% of respondents said that the overall quality of City services “Exceeds or Greatly Exceeds Expectations”.
- 2014 showed a one -year bump in the percent of residents indicating the quality of City services “Greatly Exceeds” expectations. Aside from 2014, results have remained steady through the years.

## 2016 Budget, Performance, and Business Survey Survey Highlights

### Comparability to Other Communities:

Respondents were asked: *Compared with other cities and towns, how would you rate Bellevue as a place to live?* (In 2011 and 2012 the question was worded: *How closely does Bellevue match your view of an ideal city to live in?*) The following graph provides results and comparisons to previous surveys.

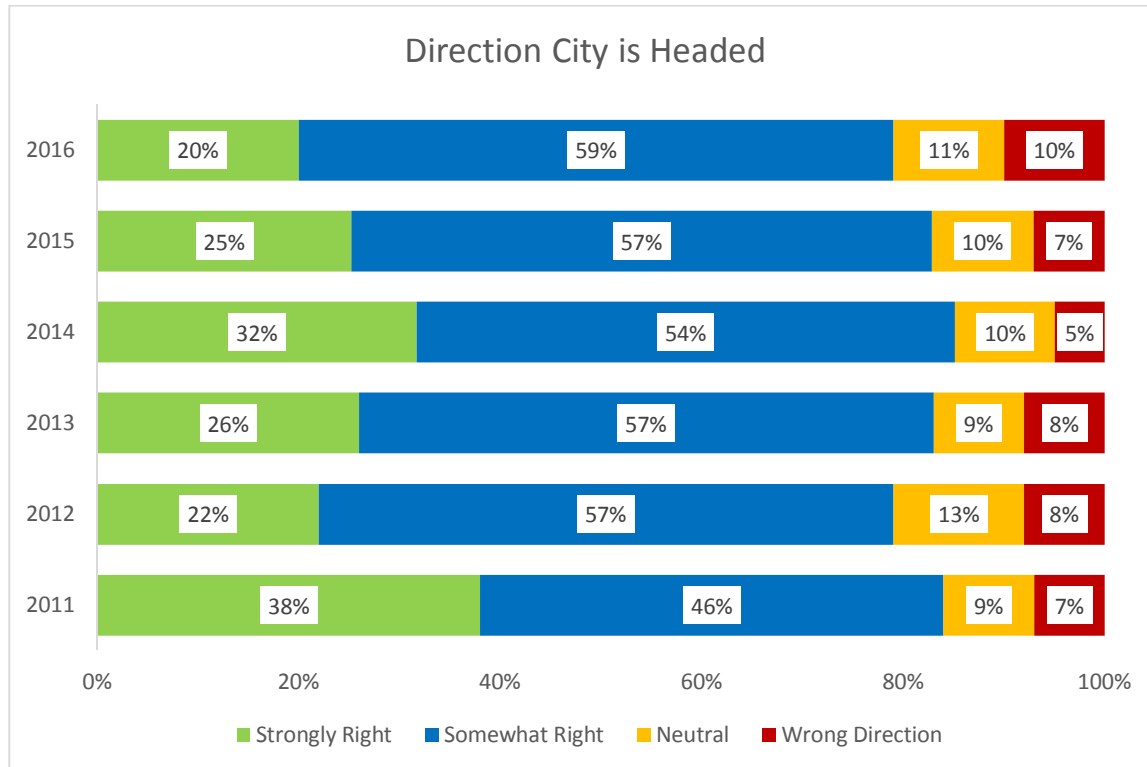


- Four out of ten (43%) Bellevue residents say that Bellevue is significantly better than other communities are as a place to live.
- Nearly half (49%) that Bellevue is better.
- 2014 was the peak year. Since then, there has been a gradual shift from “Significantly Better” to “Better” than other cities.

## 2016 Budget, Performance, and Business Survey Survey Highlights

### Direction the City is Headed:

Respondents were asked: *Overall, would you say that Bellevue is headed in the right or wrong direction?*  
The following graph provides results and comparisons to previous surveys.

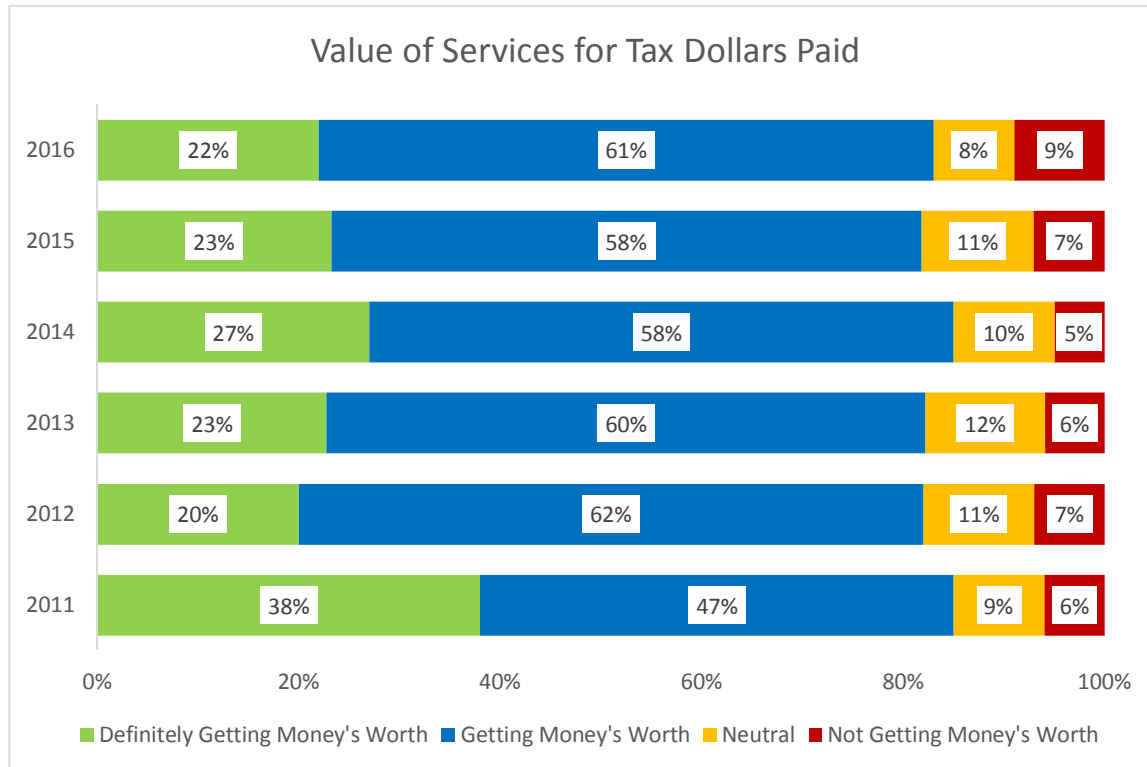


- The majority (79%) of Bellevue residents continue to feel the City is headed in the right direction.
- There has been a significant decline each year from 2014 in the percent of residents who say “Strongly” headed in the right direction.

## 2016 Budget, Performance, and Business Survey Survey Highlights

### Value of Services for Tax Dollars Paid:

Respondents were asked: *Do you feel you are getting your money's worth for your city tax dollar?* The following graph provides results and comparison to previous surveys.



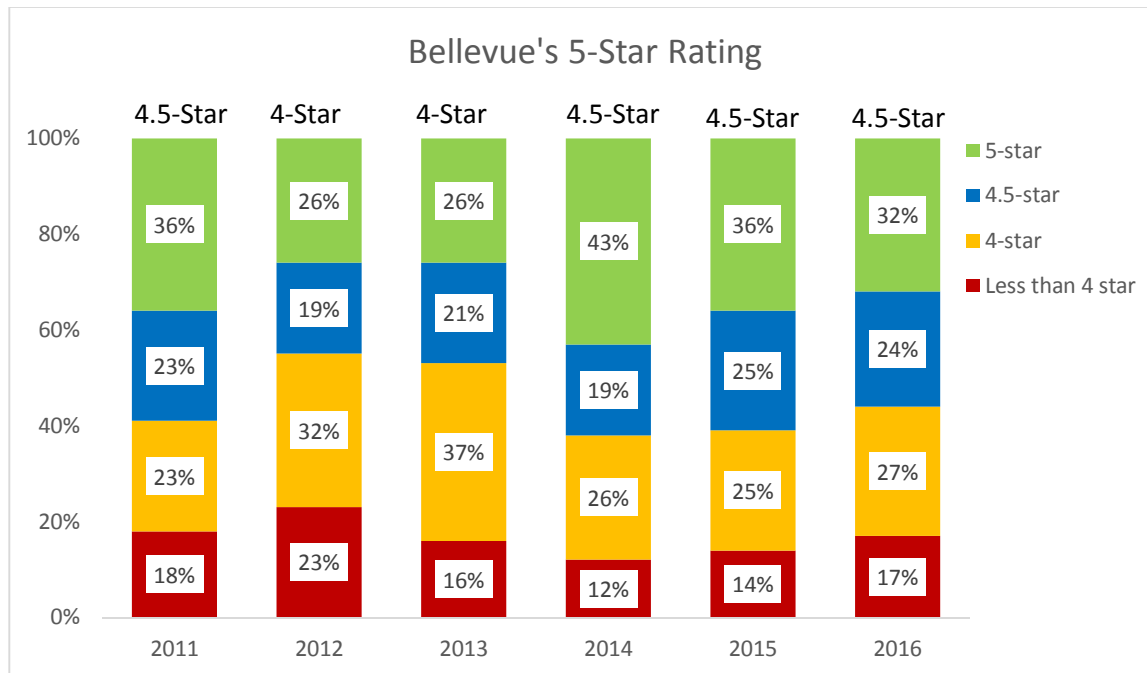
- The majority (83%) of Bellevue residents continue to feel they are getting their money's worth for the tax dollars they pay.
- This has remained consistent to other years going back to 2012.

## 2016 Budget, Performance, and Business Survey Survey Highlights

### Bellevue's 5-Star Rating:

The-5-Star Rating is a composite index that captures the essence of how well a city meets the critical needs and expectations of its residents based on a robust theoretical and mathematical model. The model is constructed on the weighted sum of five questions: (1) overall quality of life, (2) overall quality of city services, (3) comparability to other communities, (4) direction the community is headed, and (5) the perceived value of services for tax dollars paid.

The following graph provides results and comparisons to previous surveys.



- Bellevue retains its rating as a “4.5 of 5 stars” city for the third year in a row.
- 2014 was the peak year for Bellevue in that 43 percent of resident’s rated the City as a 5-Star City. The percent rating Bellevue as a 5-Star City declined significantly in 2015, but has remained steady from 2015 to 2016.

## 2016 Budget, Performance, and Business Survey Survey Highlights

### 2015 Business Survey Highlights

Following are highlights from this survey. The full report is available on the City website.

The Business Survey is an important part of the city's Business Retention Program (BRE) whose goal is to develop and promote a healthy and vibrant business climate in Bellevue. The survey utilized a list of businesses provided by the Washington State Department of Revenue. In all, approximately 8% of all 11,443 businesses were interviewed.

The first survey will serve as a base-line and allow us to implement recommendations and measure our progress to enhance the business climate in Bellevue. Subsequent surveys will occur every other year so the results can be measured and strategies developed for funding in the following budget process.

## Sample Size & Margin of Error

### Sample Size:

- A total of 917 interviews were completed:
  - 770 online and 147 via telephone
  - Aggregate margin of error no greater than plus or minus 3.1% at a 95 percent confidence level.

	Completed Surveys				In Sample Universe		% of Businesses Interviewed	Margin of Error at 95% confidence
	Phone	Web	Total		Total			
Business Services	26	221	247	27%	3,047	27%	8%	6.0%
Information Technology	26	58	84	9%	857	7%	10%	10.2%
Retail	47	80	127	14%	1,311	11%	10%	8.3%
Tourism	29	36	65	7%	689	6%	9%	11.6%
Other	19	375	394	43%	5,539	48%	7%	4.8%
Total	147	764	917	100%	11,443	100%	8%	3.1%

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### Top-Line Results

#### **Bellevue receives high ratings for all of its key metrics:**

- ❑ 7 out of 10 businesses feel that Bellevue is a "somewhat" or "significantly" better place to operate a business when compared to other cities.
- ❑ 2/3 of businesses in Bellevue feel that the quality of services provided to businesses by the City "exceeds" or "greatly exceeds" their expectations.
- ❑ 69% feel that the city is moving in the right direction
- ❑ 60% feel that they are getting their money's worth for the tax dollar paid
- ❑ Issues: traffic, parking, and lack of affordable housing
- ❑ 57% are likely to recommend starting a business in Bellevue
- ❑ 92% feel Bellevue's economy is better than other cities in the Puget Sound Region

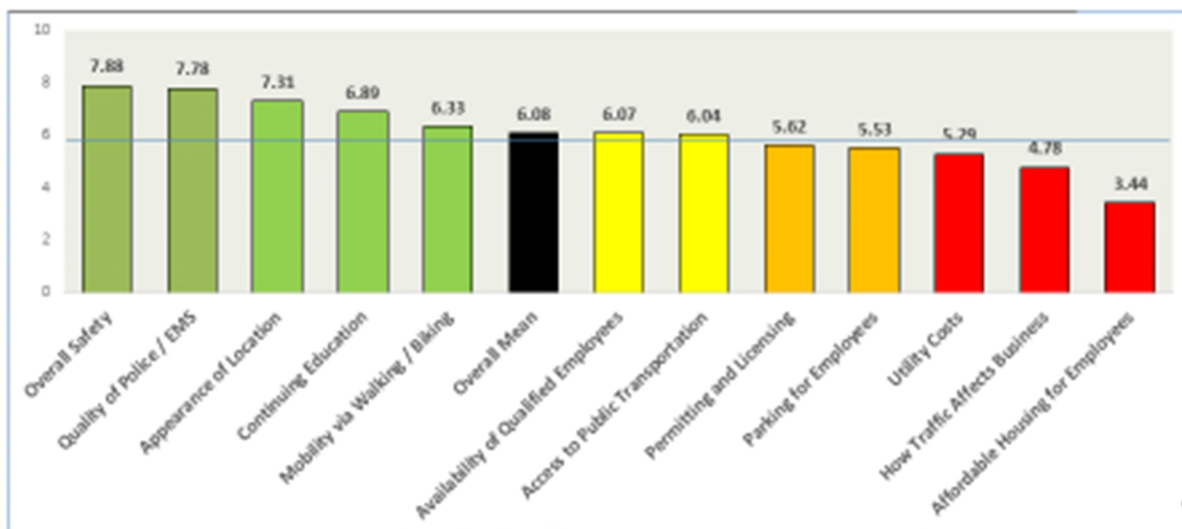
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## 2016 Budget, Performance, and Business Survey Survey Highlights

### City-Wide Results

#### Summary:

- ❑ Businesses used an 11 point scale. "0" (significantly worse) and "10" (significantly better) than other cities and towns.
- ❑ Findings align with BRE visit feedback.



The blue line represents the “overall mean”. In essence, those above the blue line are performing above average and those below the blue line are performing below average.

While Bellevue performs quite well in most regards, key areas of concern are these:

- Affordable housing for employees
- How Traffic affects businesses
- Utility Costs

Two additional areas are also below average but are of secondary concern;

- Parking for employees
- Permitting and Licensing



## 2016 Budget, Performance, and Business Survey Survey Highlights

### Top Issues by Sector

Overall	Business Services	Information Technology	Retail	Tourism	Other
Traffic	Traffic	Traffic	Traffic	Traffic	Traffic
Taxes	Parking	Taxes	Taxes	Taxes	Taxes
Parking/ Affordability	Transportation	Affordability	Parking	Small business support/ Labor	Affordability

#### Business Quote Excerpts:

- *Traffic congestion. This keeps employees & customers from getting to their destination.*
- *...I am trying to find a new employee, but at their pay scale, they can't afford to live in Bellevue, so they commute in from more affordable areas...*
- *When we were located in the city of X, the tax reporting was much easier and less expensive.*

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