

Performance and Budget Survey Results – 2020

The top line results for both the 2-year Budget Survey and the annual Performance Survey are presented in the attached. Both detailed reports are in the process of being finalized and should be available online in July 2020.

Key Results

Performance Survey results are generally high. Like in previous years, overall, residents have positive opinions of Bellevue's quality of life, the value for tax dollar, the quality of city services, and other characteristics. Likewise, Bellevue's survey results often outperform national, regional and Washington benchmarks. The 2018 decline in some results are now confirmed to be a single-year dip, not a sustained downward trend.

Budget Survey results show that residents' top budget priorities include safety, transportation, and maintaining a well-balanced mix of urban areas with natural neighborhoods and open spaces. Resident rankings of the satisfaction with and importance of city services and facilities remained generally unchanged from previous years. The biggest problem facing Bellevue remains traffic and transportation-related problems followed by housing/affordability, public transit, and homelessness. Of worthy note is the change in opinion regarding city services and taxes; more residents say they are less willing to pay more in taxes.

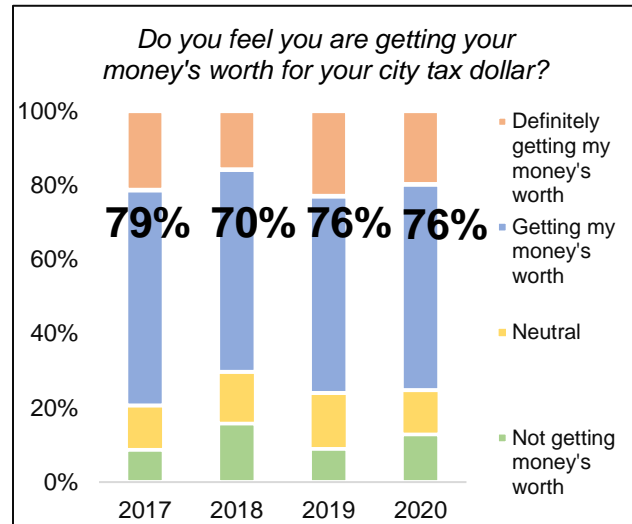
Both surveys were conducted while COVID-19 was global and national news. The Budget Survey concluded prior to the Governor's Stay Home/Stay Healthy proclamation of March 23, 2020. The Performance Survey concluded in early April 2020.

Performance Survey:

2020 results have confirmed that 2018 results were not a downward trend, but a single-year dip. The results of the top line metrics are highlighted below. The full report is being completed which will have additional analysis and information. It is expected to be posted online in July 2020.

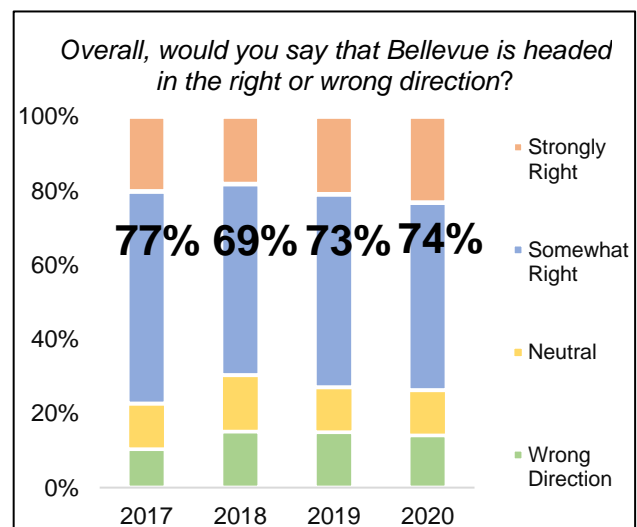
Value for the Tax Dollar:

Most residents think they are definitely getting or getting value for their tax dollar (76 percent in 2020). This measure is up from a low of 70 percent in 2018. We do know that in 2018, the McCleary property tax issue was consistently in the news, and there was a strong feeling of high taxes in the region. In 2017, Sound Transit's car tab fee was also in the news.



Direction the City is Headed:

Most people believe the city is strongly headed or somewhat headed in the right direction (74%). This is up from a 69% in 2018. The top reasons given for why the city is headed in the right direction are government leadership, public transportation, and strong economy/business growth. The top reasons given for why the city is headed in the wrong direction are growth/construction, cost of living/expenses, and traffic/public transit.



Quality of Life, Quality of City Services, Bellevue as a Place to Live, and Neighborhoods as a Place to Live:

Bellevue residents continue to have very high opinions of the quality of life in Bellevue, the quality of city services, and Bellevue and its neighborhoods as places to live. In these areas, Bellevue has excelled for years and consistently exceeds external benchmarks.

Residents who noted “exceeds or greatly exceeds expectations”

| Quality of Life | Quality of City Services |
|-----------------|--------------------------|
| 94% | 89% |

Residents who noted “good to excellent place to live”

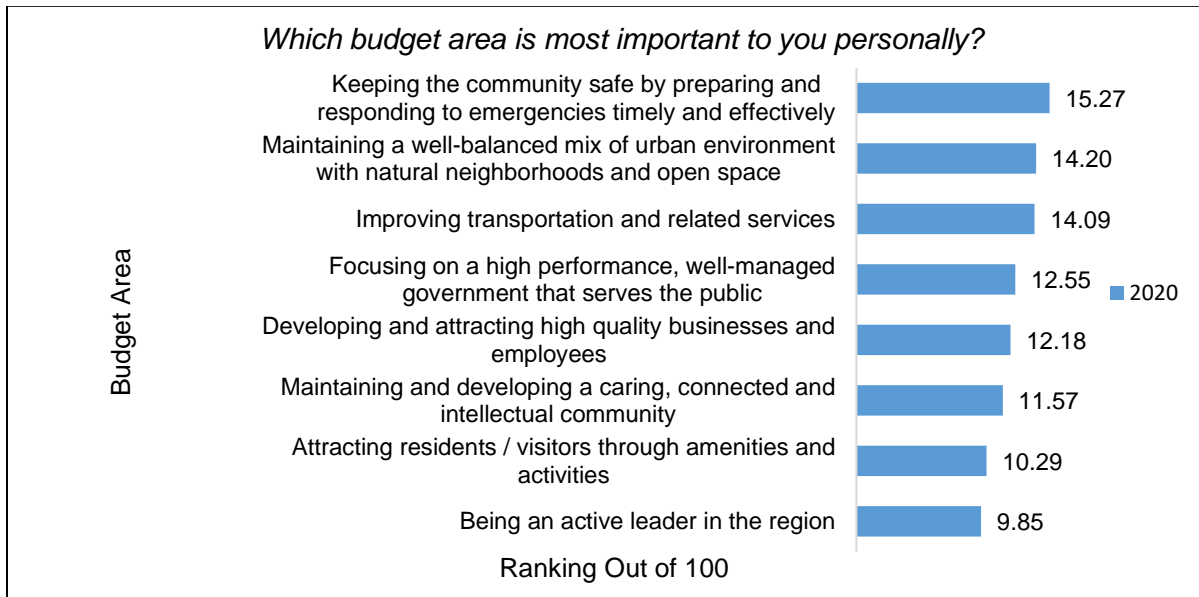
| Bellevue as a Place to Live | Neighborhoods as Places to Live |
|-----------------------------|---------------------------------|
| 95% | 93% |

Budget Survey

The results of the top line metrics are highlighted below. The full report is being completed which will have additional analysis and information. It is expected to be posted online in July 2020.

Budget Priorities Rankings

Residents rate safety as the top budget priority. This is followed by maintaining a well-balanced mix of urban environment with natural neighborhoods and open spaces, and improving transportation and related services.



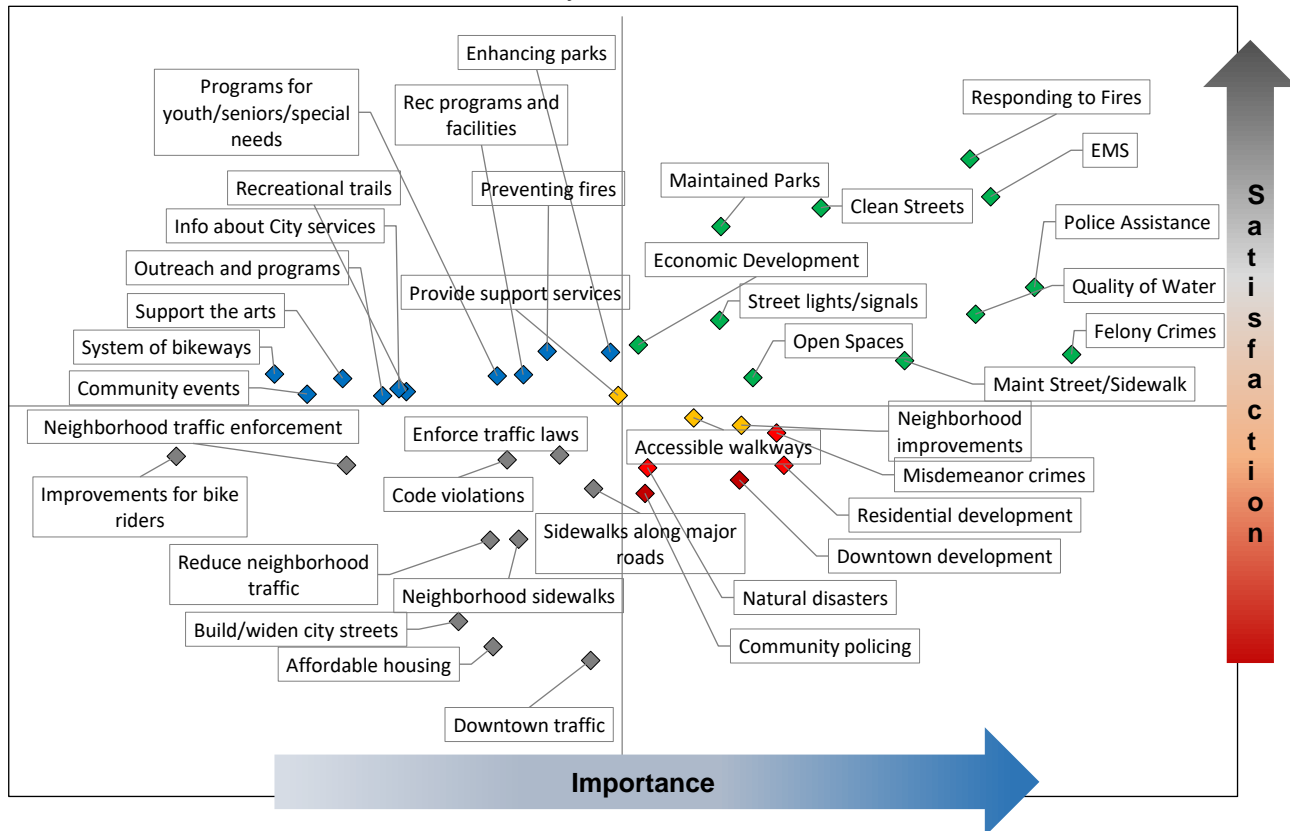
Note: Budget priority language was changed for 2020. Results are not reverse trendable but will be trendable for future years.

Satisfaction with and Importance of City Services and Facilities:

Residents remain satisfied with service delivery and consider nearly all city services at least somewhat important. This is consistent with previous years.

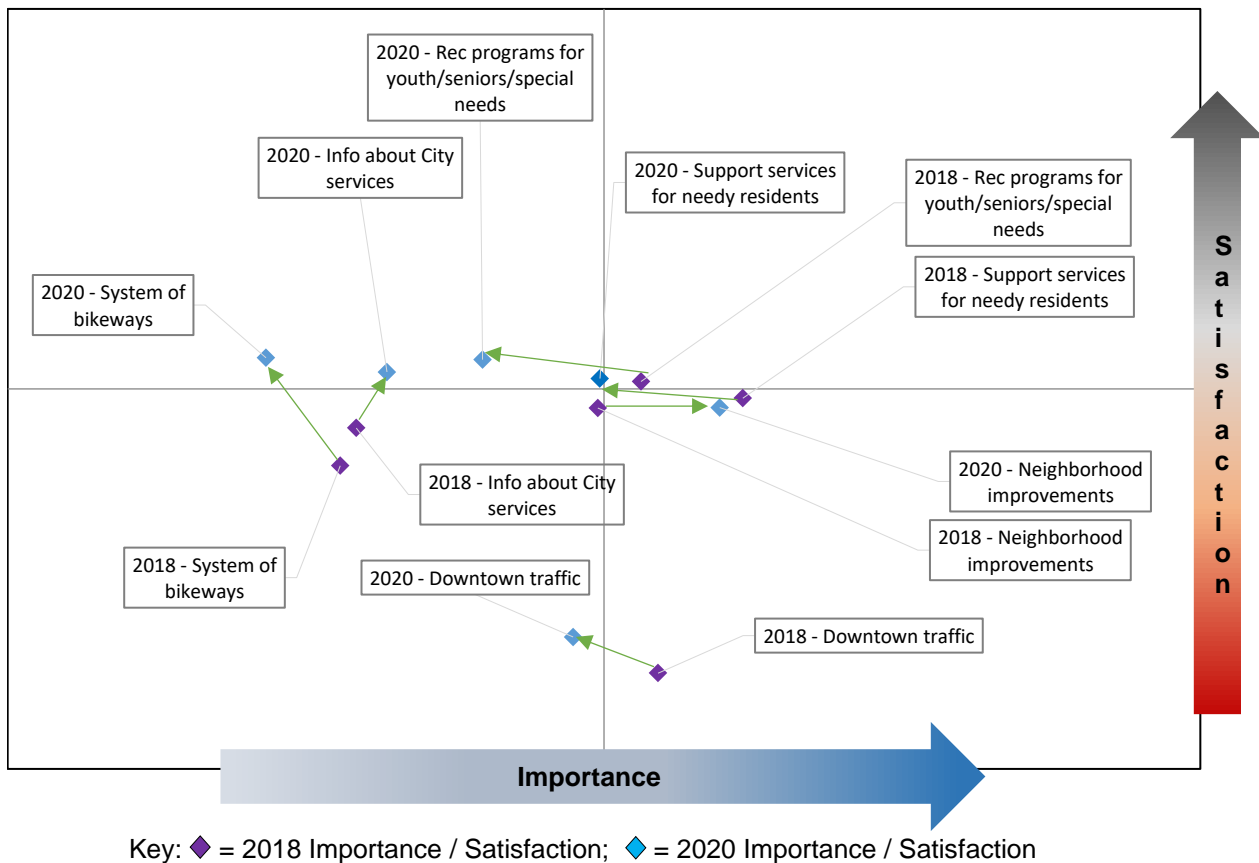
The first “quadrant analysis” chart below identifies how best to allocate resources across the services listed:

Quadrant Analysis: How Best to Allocate Resources



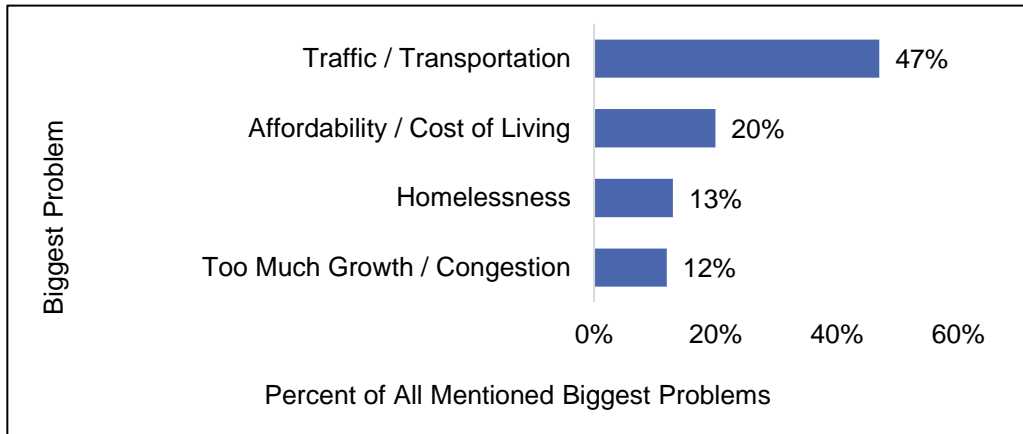
The second quadrant analysis chart below shows changes from 2018 to 2020. Satisfaction increased for the noted items. Services that decreased in importance include support services for needy residents and recreation programs for youths, seniors and people with special needs. This decrease in importance could mean that the residents' needs are being met in these areas, although the survey data didn't give additional context.

Quadrant Analysis: Key Changes from 2018 – 2020



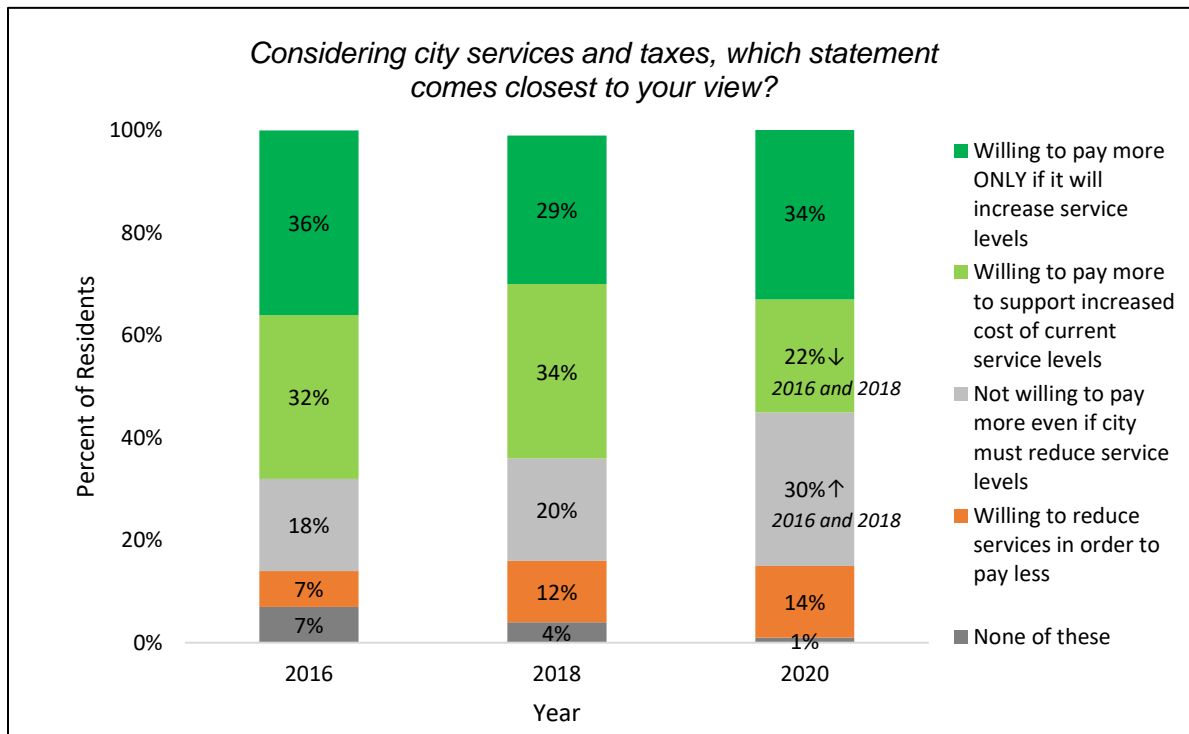
Biggest Problem Facing Bellevue:

Respondents were asked an open-ended question about the biggest problem facing Bellevue. Traffic and transportation-related problems are the most commonly mentioned issues. Other mentioned areas include housing/affordability, public transit, and homelessness. Affordability is the second-ranked issue for two consecutive surveys. It is most commonly mentioned by residents under 35-years-old and residents who live in multi-family housing.



Taxes and Funding of City Services and Facilities:

There has been a shift in resident opinion about city services and taxes. 2020 results show that residents are less willing to pay more in taxes, even if the city must reduce services. In 2018 63% of respondents noted they were willing to pay more in taxes. In 2020, this number is 56%.



Note on COVID-19

Both surveys were conducted while COVID-19 was global and national news. The Budget Survey concluded prior to the Governor's Stay Home/Stay Healthy proclamation of March 23, 2020. The Performance Survey concluded in early April 2020.

The vendor confirmed that there was no discernible effect of COVID-19 on Budget Survey results or funding priorities. There was also no major impact to marquee Performance Survey results – there were no decreases in residents' sense health or well-being, for example. There were, however, two small *potential* impacts of COVID-19 on other Performance Survey questions:

- Compared to previous years, residents place more importance on planning for emergencies.
- Residents have more emergency supplies on hand. From 2019 to 2020, the median days of supply increased from 7 days to 10 days. The percentage of residents with two plus weeks of supplies doubled, from 19 to 38 percent.