FINAL REPORT

City of Bellingham Economic Development and Planning Survey

September, 2007

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EXECUTIVE SUMMARY

INTRODUCTION

In June of 2007, the City of Bellingham conducted a study of businesses with a survey intended to help the city better understand and support businesses in Bellingham. The surveys questions related to:

- Economic outlook for themselves and the city
- Experience doing business in Bellingham
- Satisfaction with city services and their importance to businesses
- Use of city contractors for business support
- Basic descriptors of their business.

In all, 303 owners, managers, CEOs and presidents completed the survey of about 40 questions. This report describes the findings of that survey and subsequent analysis.

Business characteristics

On average, surveyed businesses had been operating in Bellingham for 17.7 years (median 12 years) and respondents had been in their current positions for 11 years (median 7). They employed an average of 16.2 people, though the median was 5, showing that half of businesses in Bellingham employ 5 people or less.

Average revenue was between $1 million and $2 million, but most businesses earn less than $500,000 a year. About one-third (37%) of Bellingham businesses saw sales revenues between $100,000 and $499,999 in 2006.

Businesses were classified using the North American Industrial Classification System (NAICS) and reduced to the broadest (2-digit) categories. The largest industries represented in Bellingham's economy include retail trade (16%), health care and social assistance (14.9%), other services (12%), and professional, technical and scientific services (10.9%).

FINDINGS

Economic outlook

More than two-thirds of respondents consider Bellingham a *good* or *very good* (35% or 33% respectively) place to do business. Respondents in businesses with 12 or more employees gave much higher ratings to Bellingham as a place to do business, with more than 60% saying it was *very good* or *excellent*.

Respondents were asked to describe one thing they would change about doing business in Bellingham and 218 provided responses. Attitudes and the general climate for business in the city is a concern, along with taxation and regulation. Transportation issues were also mentioned, as was the overall economic climate for business growth and sustainability.

More than three-quarters, or 77%, of respondents described the state of Bellingham's economy as *good*, and 12% described it as *excellent*. Ten percent described it as *not so good*, and 1% of respondents described it as *poor*.

When asked about the future of Bellingham's economy, more than half (54%) think it will *improve*, while 36% think it will *stay the same* and 10% think it will *get worse*.

For 2007, two-thirds (67%) of respondents predicted that their revenues will grow. Twenty-seven percent say revenues will stay the same, and 6% say revenues will contract.

City services

Respondents were asked the importance of a series of essential, city services with regard to their business. In addition, they were asked to rate how well the city provided that service. Rank ordered, they were (with 1 being the highest rank):

- Public Safety including police & fire protection and emergency medical services (Importance: 1; City Performance: 1)
- Utilities, including Water, Sewer, and Storm Drainage (Importance: 2; City Performance: 3)
- Transportation including street maintenance and lighting; traffic management; Bicycle and pedestrian access; Parking (Importance: 3; City Performance: 4)
- Community Development including land use planning, environmental protection, building safety inspection, permitting and economic development (Importance: 4; City Performance: 7)
- Elected Leadership including the City Council and Mayor's office (Importance: 5; City Performance: 6)
- Cultural and recreational programs and facilities such as Parks and Open Space; Recreation; Libraries; Theaters and Museums (Importance: 6; Rating: 2)
- Public involvement including Advisory Boards and Commissions (Importance: 7; City Performance: 5).

It is good that for the most part, the city's performance ratings were similar to the importance ratings of the services. Discrepancies provide some interesting opportunities for further research and responsiveness.

City-sponsored business service organizations

Respondents were read a list of six different city-sponsored business service organizations and asked if they were aware of the organization, and if so, whether they had used it. The organizations included:

- The Small Business Development Center (SBDC)
- Sustainable Connections (SC)
- The Downtown Renaissance Network (DRN)
- SCORE business counseling services (SCORE)
- The Economic Development Council (EDC)
- The Technology Alliance Group (TAG)

More than one-quarter of respondents had used Bellingham's Small Business Development Center and nearly half had heard of it. The most widely known organization is the Economic Development Council (74%), but it was not widely used (10%). The Technology Alliance Group was less than one year old at the time of the survey – its awareness and use ratings are expected to grow, especially in the technology sector.

Emergency preparedness

Businesses were asked how well prepared they were to handle a natural disaster or state of emergency. About a third (34%) said they were *very* or *extremely* well prepared. Fourteen percent said they were *not very* prepared, and 10% are *not at all* prepared. Companies with more employees were more likely to report being at least *very well* prepared. This question was asked primarily to set a baseline for work the city may do in the coming year.

Employment

A series of questions were asked relating to employment including:

- Prospects for job growth or contraction within the next year
- Difficulty with hiring and retaining qualified employees
- Barriers to finding and keeping the people they need

Respondents were asked if they anticipated adding or laying off employees in the coming year, and if so, how many. The majority (51%) did not anticipate making any changes, 29% expected to add employees (average=3.6; median 2) and 1% expected to lay off employees (average=2.8 employees; median=3). If this distribution holds for the entire population of businesses in Bellingham (estimated at 5,000), about 5,200 jobs would be added over the next year.

One-third (33%) of respondents said they found it *easy* or *not very difficult* to find and keep qualified employees. More than one-third (37%) found this *somewhat* difficult, while slightly less than one-third (30%) found it *very* or *extremely* difficult. It is worth noting that 20% of respondents, or 62 businesses, did not have any employees at the time of the survey.

The most prevalent issue for companies is being able to provide competitive compensation, followed closely by both housing costs and health insurance. When asked for other issues, respondents also said that merely being able find the right employees was an issue.

Businesses' land use and space needs

Land supply for business use is another potential area in which the city may be able to set policy or make decisions that impact businesses.

When asked, more than half (57%) of respondents said that they found it *easy* or *not very difficult* to meet their needs for space for their business. Twenty-four percent found this *somewhat* difficult, while 12% found it *very difficult* and 7% found it *extremely difficult*. It is worth noting that 35 respondents (12%) indicated this as *not applicable* primarily because they worked from a home office.

Larger companies and those with higher sales volume were more likely to say that it had been *extremely* or *very difficult* to find the spaces they needed. Accommodation and food service was the industry group most likely to have the greatest difficulty finding the spaces needed (47% said *extremely* or *very*) followed by retailers (27%).

OPPORTUNITIES

The results of this survey provide a baseline of attitudes and perspectives of businesses in Bellingham, and suggest several compelling points of action for the city in the coming year. Approached intentionally, the city could leverage these findings to infuse the area's economic sustainability. It is noteworthy that the city's business support resources are for the most part well known by Bellingham business managers, but used by a small minority of them. The city and its practitioners may benefit from further research to identify gaps in support being provided and/or identifying needs being met.

Establish a Dialogue with Local Businesses

Right now, most businesses feel positively about doing business in Bellingham, so it is a good time to establish an on-going dialogue with local businesses. With larger businesses (more than 12 employees) giving significantly higher ratings to Bellingham as a place to do business, it will be especially important to involve small businesses in the conversation. Developing forums that are accessible to both large and small businesses would enable the city to collaborate with local business to identify and implement meaningful improvement actions. Sharing results from this survey about issues, such as those listed below, would introduce a comfortable approach for initiating a conversation with local businesses about topics of greatest concern.

- There is an overtone of concern over the role that business plays in the larger community, and how the city and residents view businesses – often with either indifference or offense.
- For transportation and community development services, which businesses considered important, the city received mediocre ratings.
- The survey confirms the need to support change in permitting process – work that the city is already doing.
- Survey findings also confirmed anecdotal evidence of businesses having difficulties finding employees (more detail below) and space to do business. Land supply is a particular issue for larger companies.

Help Businesses Find "Good-Match" Employees

The survey findings also confirmed anecdotal evidence of businesses having difficulties finding employees, a concern that cuts across all types of companies. By identifying the type of training and experience gaps that are in the labor market, the city could better understand specific areas for action. Three possible directions would be 1) partnering with local colleges to provide employment training to enhance the labor pool, 2) working through the city's business support services to help find resources for locating people with the skill sets needed and 3) providing training for managers through business support services regarding resources for locating potential employees.

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INTRODUCTION

In June of 2007, the City of Bellingham contracted with Applied Research Northwest to conduct a study of businesses. The survey is the first step in a process preparing to launch a proactive economic development plan that will better serve the community by providing appropriate support for businesses in Bellingham. It is intended to be a baseline survey, with some of the questions repeated on a regular basis. The surveys questions related to:

- Economic outlook for themselves and the city
- Experience doing business in Bellingham
- Satisfaction with city services that support business
- Use of city contractors for business support
- Basic descriptors of their business.

In all, 303 Owners, managers, CEOs and Presidents completed the survey of about 40 questions. This report describes the findings of that survey and subsequent analysis.

A complete description of the research methods is included in Appendix A. The complete content of the survey script and frequency distributions is contained in Appendix B.

BUSINESS CHARACTERISTICS

A combination of methods were used to determine business characteristics including asking respondents during the survey for information, asking them to verify data provided in the databases purchased for the project, and using the data provided in the databases.[1]

On average, surveyed businesses had been operating in Bellingham for 17.7 years (median 12 years) and respondents had been in their current positions for 11 years (median 7). They employed an average of 16.2 people, though the median was 5, showing that half of businesses in Bellingham employ 5 people or less.

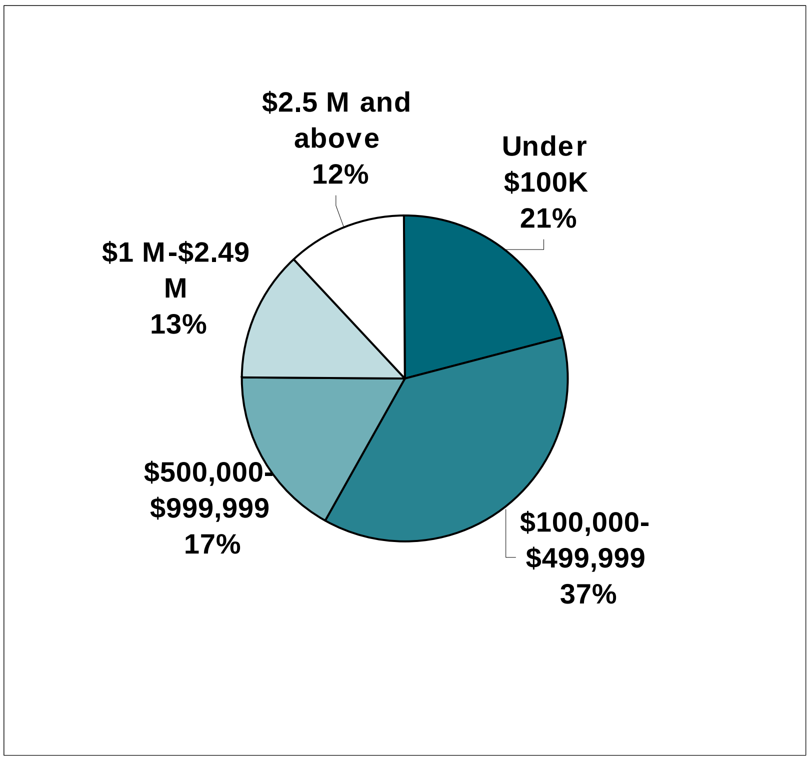
Because of some very-high revenue businesses, average revenue was between $1 million and $2 million, but as Figure 1 shows below, most businesses earn less than

[1] A mix of methods was used to verify the database information for accuracy. A complete description of the analysis and what was found is contained in Appendix A of this report.

$500,000 a year. Since so many businesses reported revenues between $100,000 and $500,000, future surveys should ask for smaller divisions of income in the lower ranges.

About one-third (37%) of Bellingham businesses saw sales revenues between $100,000 and $499,999 in 2006. Top-earning businesses, that earned $2.5 million or greater, account for 12% of respondents. The lowest-income businesses, that earn less than $100,000, account for about one-fifth (21%) of respondents. Another one-fifth (17%) earned between $500,000 and $999,999, and 13% earned between $1 million and $2.49 million last year. The median revenue per employee is $100,000, with an average earnings of $124,650.

Figure 1. Sales revenue of responding businesses (N=231)



These data were interpolated from a combination of survey data and figures provided by sample databases.

The survey asked respondents what type of space they used. Multiple answers were possible. Most businesses used commercial office space (52%), while 30% used retail space. Interestingly, 17% were located in home offices and residential space. Twenty-one businesses used a combination of spaces – 11 blended commercial space with retail (4), home offices (2), manufacturing (2), storage (2), and land (1). Two retailers also had home offices. Sales volume tended to vary with type of land use, but not in a way that was statistically significant. Retail, manufacturing and storage space businesses tended to have more employees than other types of space users.

Table 1. What type of space does your business currently use in Bellingham?

	N	%	Est. Average # of Employees
Commercial office	149	52	14.8
Retail space	87	30	23.2
Home office/ Residential	48	17	1.7
Manufacturing space	15	5	27.1
Storage space	8	3	45.7
Land	3	1	2.3

N=288; % sums to greater than 100 due to multiple responses

Businesses were classified using the North American Industrial Classification System (NAICS) and reduced to the broadest (2-digit) categories. The population and survey distributions are shown in Table 2. The distribution of the sample matches that of the population very closely, considering there was an estimated 6% margin of error in the survey. No industry group was over or under represented by more than 4% – the highest being for construction (3.4) and other services (3.7).

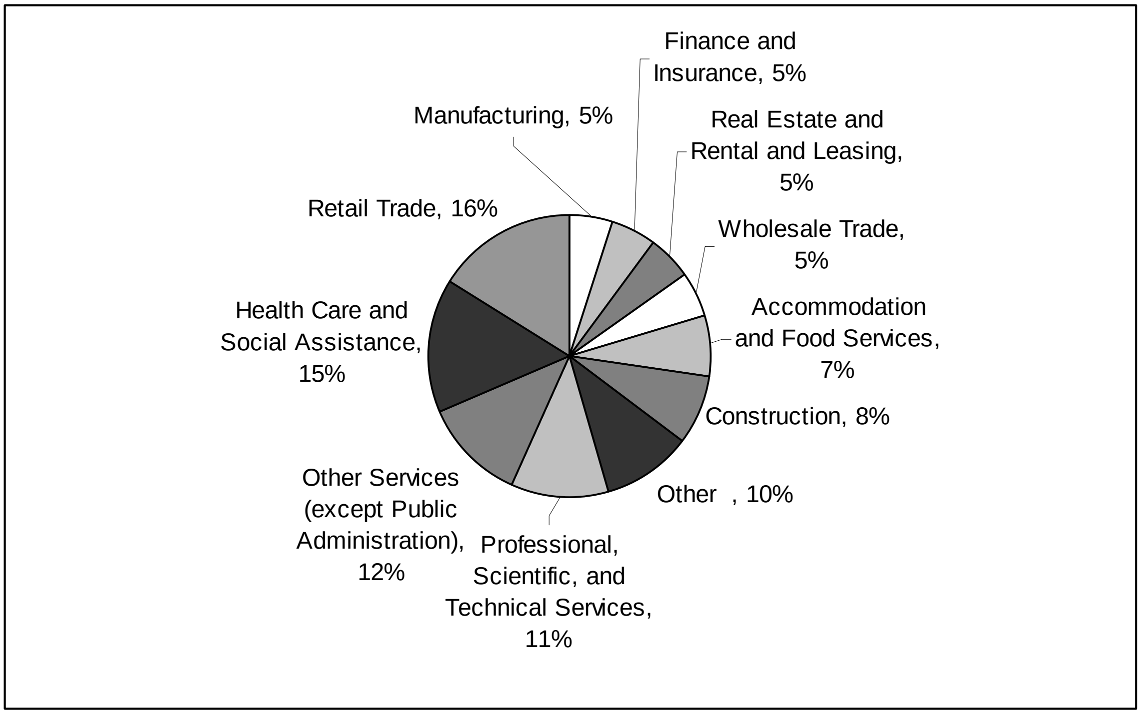
The largest industries represented in Bellingham's economy include retail trade (16%), health care and social assistance (14.9%), other services (12%), and professional, technical and scientific services (10.9%). Figure 2a summarizes the distribution in the population for 90% of Bellingham businesses.

Table 2. NAICS 2-digit categories for survey and population databases (sorted)

	Survey		Population*	
	N	%	N	%
44 Retail Trade	57	18.9	786	16.0
62 Health Care and Social Assistance	53	17.6	732	14.9
81 Other Services (except Public Administration)	25	8.3	590	12.0
54 Professional, Scientific, and Technical Services	38	12.6	533	10.9
23 Construction	14	4.7	399	8.1
72 Accommodation and Food Services	23	7.6	328	6.7
42 Wholesale Trade	13	4.3	265	5.4
52 Finance and Insurance	21	7.0	255	5.2
53 Real Estate and Rental and Leasing	15	5.0	255	5.2
31 Manufacturing	14	4.7	235	4.8
56 Administrative and Support and Waste Management and Remediation	7	2.3	155	3.2
71 Arts, Entertainment, and Recreation	7	2.3	86	1.7
51 Information	5	1.7	78	1.6
48 Transportation and Warehousing	3	1.0	71	1.4
61 Educational Services	4	1.3	45	0.9
11 Agriculture, Forestry, Fishing and Hunting	0	0.0	14	0.3
21 Mining	0	0.0	9	0.2
22 Utilities	1	0.3	4	0.1
55 Management of Companies and Enterprises	1	0.3	4	0.1
92 Public Administration	0	0.0	1	0.0
Missing	2	0.6	63	1.3
Total	**303**	**100**	**4903**	**100.0**

*Population estimates are an average of the reported frequencies from each of the two databases. For more detail, please see Appendix A.

Figure 2a. Industry distribution for city businesses



Note: “Other” includes all industries with <5% representation in the population.

Industries can be analyzed to see which bring in the highest sales revenue (gross). Table 3 shows the average sales revenue for each of the 20 different industry sectors.

Table 3. Sales revenue by industry sector (sorted by average sales)

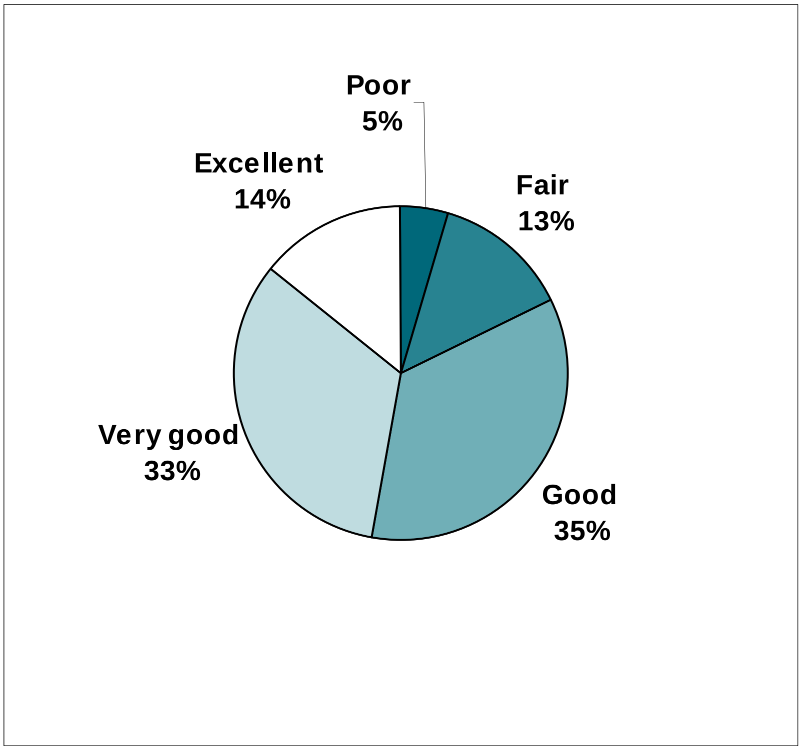
NAICS Category	Average sales
55 Management of Companies and Enterprises	$ 9,840,000
52 Finance and Insurance	$ 2,681,439
22 Utilities	$ 2,500,000
44 Retail Trade	$ 1,967,980
42 Wholesale Trade	$ 1,939,689
23 Construction	$ 1,706,585
31 Manufacturing	$ 1,604,831
51 Information	$ 1,394,444
53 Real Estate and Rental and Leasing	$ 1,349,609
56 Administrative and Support and Waste Management and Remediation	$ 1,322,286
92 Public Administration	$ 1,200,000
21 Mining	$ 920,000
48 Transportation and Warehousing	$ 898,718
62 Health Care and Social Assistance	$ 882,378
71 Arts, Entertainment, and Recreation	$ 864,286
72 Accommodation and Food Services	$ 835,347
54 Professional, Scientific, and Technical Services	$ 671,480
99 Missing	$ 600,000
61 Educational Services	$ 391,111
81 Other Services (except Public Administration)	$ 366,149
11 Agriculture, Forestry, Fishing and Hunting	$ 300,000

*Data represent all Bellingham businesses.

FINDINGS

More than two-thirds of respondents consider Bellingham a *good* or *very good* (35% or 33% respectively) place to do business. Fourteen percent consider the city and *excellent* place to do business, while 13% consider it *fair*, and 5% consider it a *poor* place to do business.

Figure 2b. Overall rating of Bellingham as a place to do business (N=296)



Respondents in businesses with 12 or more employees gave much higher ratings to Bellingham as a place to do business, with more than 60% saying it was *very good* or *excellent*. Sales revenue and industry type did not impact their reports.

Respondents were asked to describe one thing they would change about doing business in Bellingham and 218 provided responses. Those responses were reviewed and coded according to themes. Table 4, shows that attitudes and the general climate for business in the city is a concern, along with taxation and regulation. Transportation issues were also mentioned, as was the overall economic climate for business growth and sustainability.

Table 4: If you could change anything about doing business in Bellingham, what would you change?		
	N	**%**
Government and citizens' unwillingness to help businesses; discontent with leadership (inefficiency, anti-business attitude of community)	43	20%
Taxes (restructure/remove B & O Tax; too many/high; disproportionate)	38	17%
Too many regulations (difficult permit process; too many laws regarding building)	36	17%
Transportation (parking, improve/expand infrastructure, traffic, transit)	31	14%
Growth and expansion of businesses (assistance to existing businesses; attracting new businesses; sustainability)	27	12%
Cost of living (affordable housing/healthcare; living wages)	14	6%
Labor pool issues	10	5%
Nothing (wouldn't change anything)	10	5%
Issues of Location: must do business outside B'ham, trying to move	7	3%
Cost of doing business and advertising	6	3%
Improve aesthetics (homeless people; beautification)	6	3%
Customer/clientele concerns	4	2%
Competition issues	4	2%
Other, misc.	19	9%
N=218, reasons total more than 218 due to multiple responses		

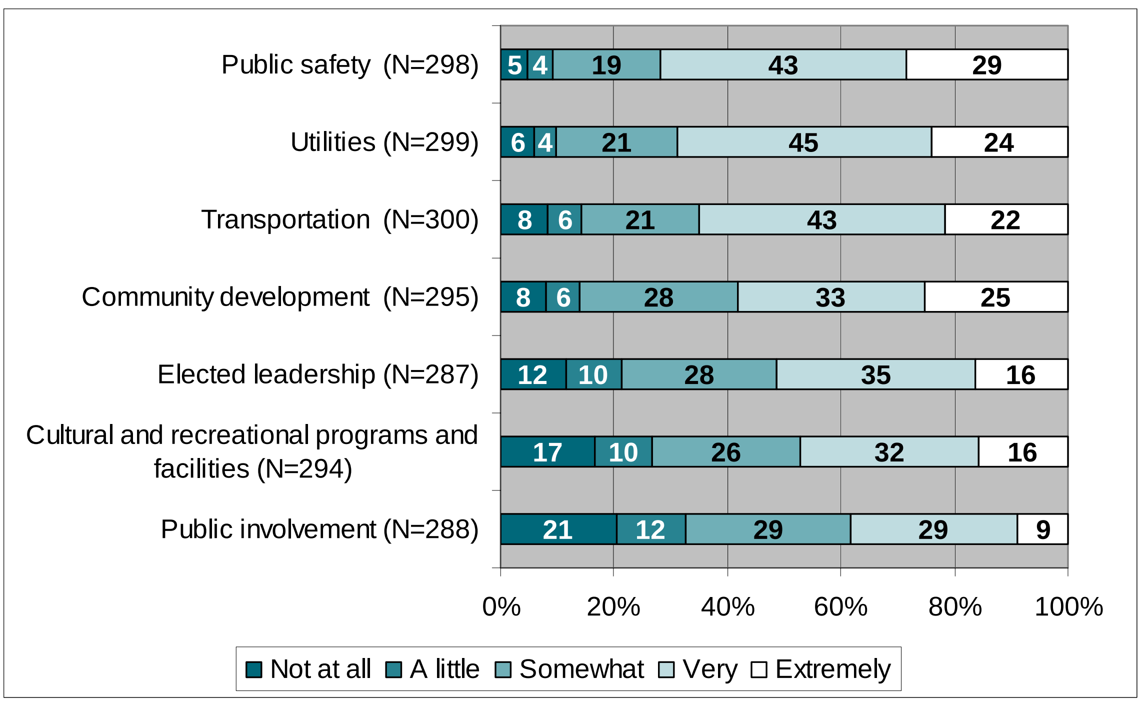
CITY SERVICES

Respondents were asked the importance of a series of essential, city services with regard to their business (see Figure 3). They included:

- Elected Leadership including the city Council and Mayor's office
- Public involvement including Advisory Boards and Commissions
- Community Development including land use planning, environmental protection, building safety inspection, permitting and economic development
- Public Safety including police & fire protection and emergency medical services
- Cultural and recreational programs and facilities such as Parks and Open Space; Recreation; Libraries; Theaters and Museums
- Transportation including street maintenance and lighting; traffic management; Bicycle and pedestrian access; Parking
- Utilities, including Water, Sewer, and Storm Drainage

Public safety was the most important essential service, with 72% of respondents rating it *very* or *extremely* important. About two-thirds of respondents rated utilities (69%) and transportation (65%) are *very* or *extremely* important. Close to half of respondents ranked community development (55%) and elected leadership (51%) as *very* or *extremely* important. Forty-eight percent rated cultural and recreational programs and facilities as *very* or *extremely* important, and 38% feel public involvement is *very* or *extremely* important.

Figure 3. Importance of essential services to respondents' businesses



In most cases, respondents were similar in their ratings of the importance of the services. However in a few cases, there were some systematic variations in the importance of the various services the city provides, especially with regard to the industry of the respondent's business. The following list shows the industries for which a majority of respondents said the service was *very* or *extremely* important, for those services that showed significant variation:[2]

- Public Safety including police & fire protection and emergency medical services[3]
    - Accommodation and food service
    - Finance and insurance
    - Health care and social assistance
    - Retail trade
    - Manufacturing
    - Wholesale trade
    - Real estate and rental and leasing
    - Other services
- Utilities, including Water, Sewer, and Storm Drainage
    - Accommodation and food service
    - Real estate and rental and leasing
    - Finance and insurance
    - Manufacturing
    - Other services
    - Wholesale trade
    - Retail trade
- Transportation including street maintenance and lighting; traffic management; Bicycle and pedestrian access; Parking
    - Finance and insurance
    - Real estate and rental and leasing
    - Other services
    - Health care and social assistance
    - Retail trade
    - Accommodation and food service
- Community Development including land use planning, environmental protection, building safety inspection, permitting and economic development
    - Real estate and rental and leasing
    - Construction
    - Accommodations and food service
    - Retail trade
    - Finance and insurance
    - Professional, scientific and technical services

[2] This analysis includes only industries with 10 or more respondents. Industries with <50% saying the service was *very* or *extremely* important are omitted from the list. The lists are rank ordered within the service categories – that is, those industries at the top of the list said the service was the most important of all the sectors.

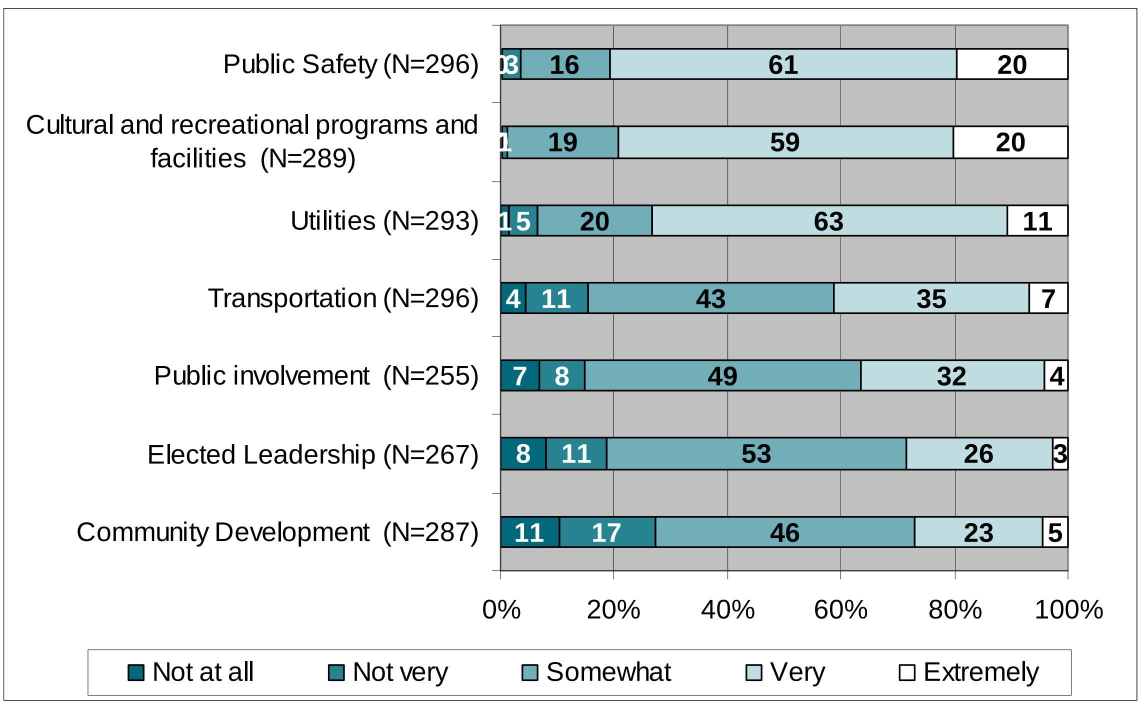
It is interesting to note that a majority of respondents from the Construction industry did not feel that utilities, transportation or public safety was *very* or *extremely* important.

The only other systematic variation in importance was with regard to transportation; businesses with more employees rated transportation as more important than those with fewer employees.

Provision of city services

Respondents were also asked to rate how well the city did in providing these services (Figure 4). The most important item (Public safety) also showed up as the highest rated item. Utilities, which was ranked second in importance, also received high ratings in provision. Forty-eight percent of respondents said the city did *very* or *extremely well* providing cultural and recreational programs, which was rated as *very* or *extremely* important by 48% of respondents. Transportation and community development, each rated as *very* or *extremely* important by a large majority of respondents (65% and 58% respectively) received more mixed ratings regarding how well the city provided the service.

Figure 4. Ratings of the City of Bellingham in providing essential services



There was no variation in the ratings of city services by size, sales volume or industry of the respondents.

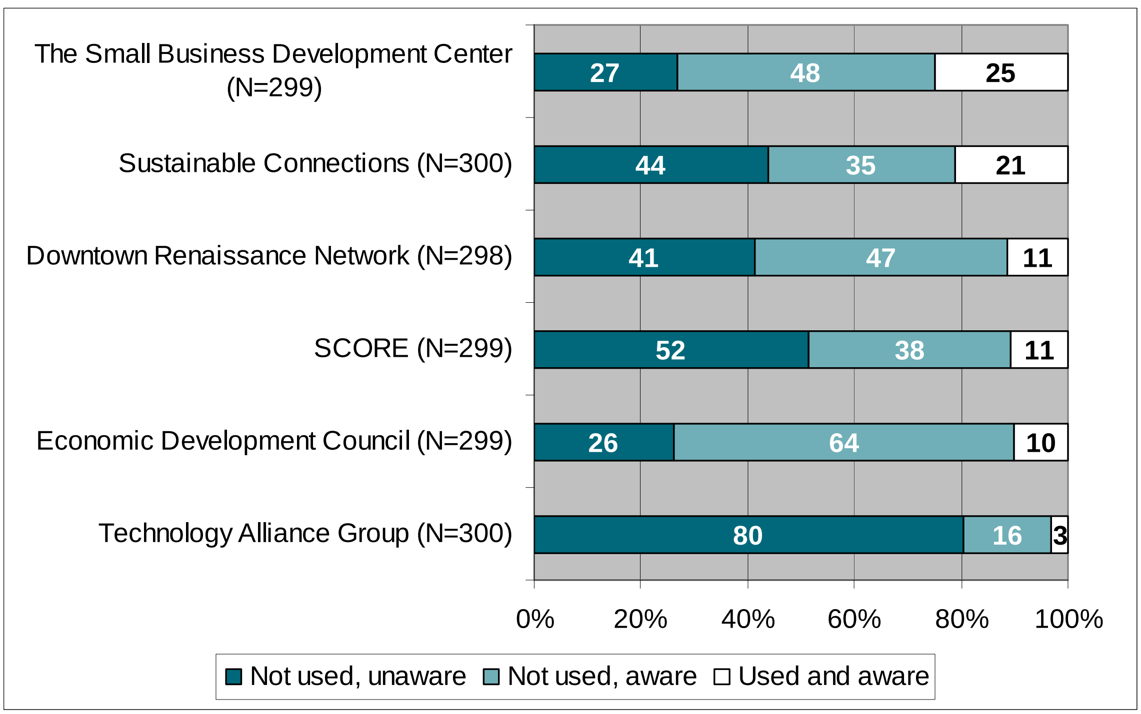
CITY-SPONSORED BUSINESS SERVICE ORGANIZATIONS

Respondents were read a list of six different city-sponsored business service organizations and asked if they were aware of the organization, and if so, whether they had used it. The organizations included:

- The Small Business Development Center (SBDC)
- Sustainable Connections (SC)
- The Downtown Renaissance Network (DRN)
- SCORE business counseling services (SCORE)
- The Economic Development Council (EDC)
- The Technology Alliance Group (TAG)

Figure 5 shows the portion of respondents who had used or heard of each organization. More than one-quarter of respondents had used Bellingham's Small Business Development Center and nearly half had heard of it. The most widely known organization is the Economic Development Council (74%), but it was not widely used (10%). The Technology Alliance Group was less than one year old at the time of the survey – its awareness and use ratings are expected to grow, especially in the technology sector.

Figure 5. Awareness and use of city-sponsored business support services



Awareness varied by certain business characteristics. For example, the SBDC was least known and least used by businesses with under $100,000 in revenue; just 19% had used the SBDC compared to 30% of businesses with revenue between $100,000 and $1 million, and 26% of businesses with revenue over $1 million.

Certain sectors of industry tended to be unaware of several of these services – especially SCORE, Sustainable Connections, and the EDC. They were:

- Construction
- Retail trade
- Health care and social assistance
- Accommodation and food service
- Administrative support and waste management and remediation
- Other services (not public administration).

These represent opportunities for expanded service to businesses that fall into these sectors.

TAG was fairly well known in information and finance and insurance sectors, but otherwise virtually unknown in other sectors. The EDC was best used by businesses with more than 1 or 2 employees, and by organizations with sales volume over $2.5 million.

There were no other variations in response to these questions according to business characteristics.

Businesses were also asked if there were other resources they used to support their business. Nearly a third mentioned other organizations. Their responses were categorized and are shown in Table 5.

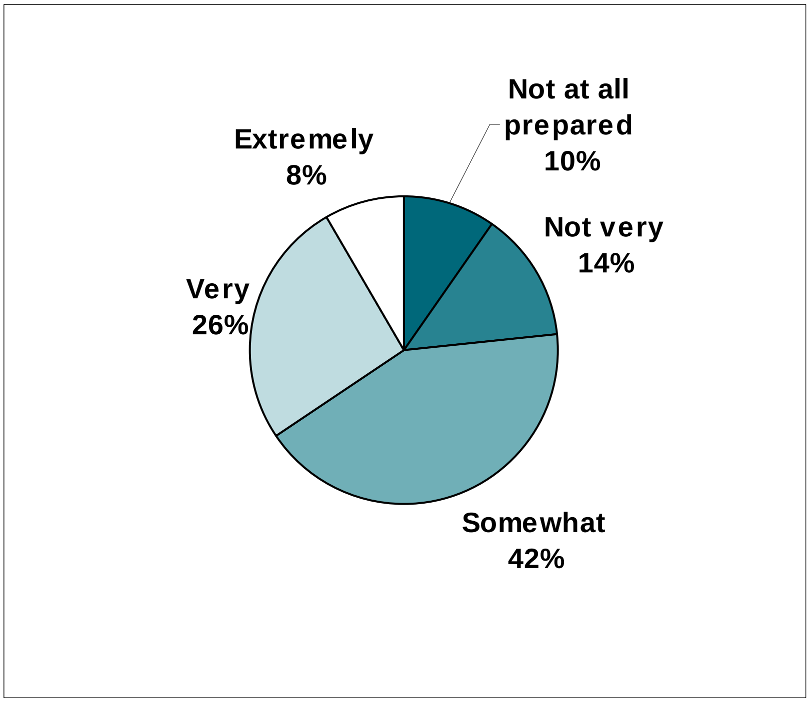
Table 5. Are there any other local agencies or organizations that you use for information or business-development services?

	N	%
Local Resources (Whatcom-specific) e.g. ReSources, tourism bureau	31	34%
Chamber of Commerce	27	29%
Nation/statewide resources (including local chapters) e.g. Kiwanis, BBB	20	22%
Learning institutions (colleges, universities, libraries)	12	13%
Government agencies	12	13%
Other	6	7%
N=92, responses total more than 92 due to multiple responses		

EMERGENCY PREPAREDNESS

Businesses were asked how well prepared they were to handle a natural disaster or state of emergency. About a third (34%) said they were *very* or *extremely* well prepared. Fourteen percent said they were *not very* prepared, and 10% are *not at all* prepared. Companies with more employees were more likely to report being at least *very well* prepared.

Figure 6. How well is your company prepared to handle a natural disaster or state of emergency? (N=288)



This question was asked primarily to set a baseline for work the city may do in the coming year.

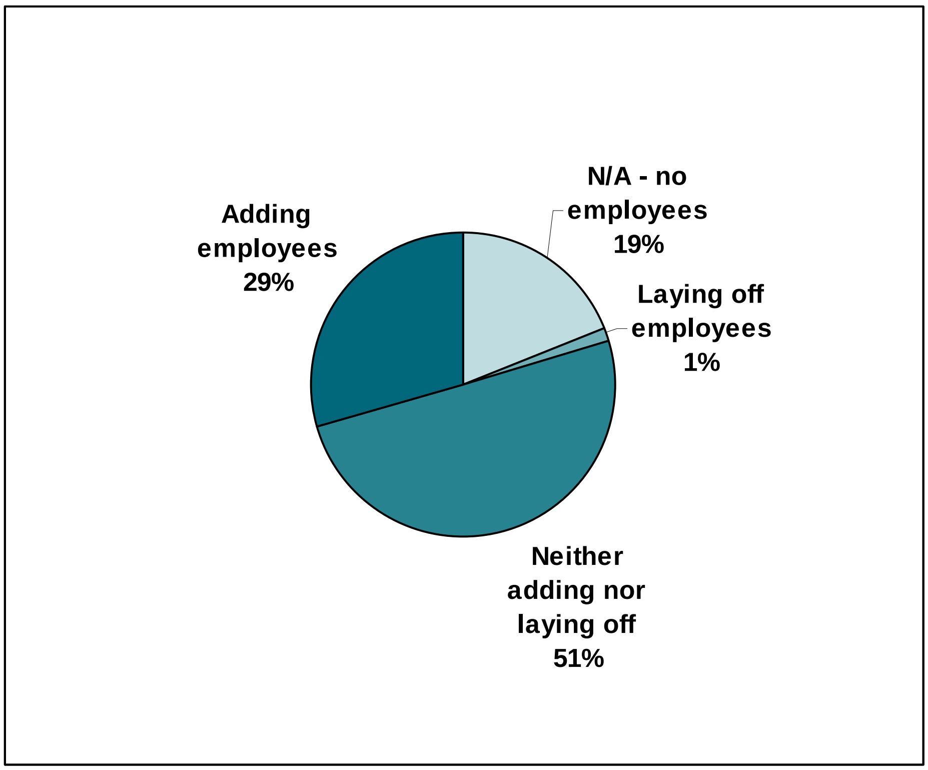
EMPLOYMENT

A series of questions were asked relating to employment including:

- Prospects for job growth or contraction within the next year
- Difficulty with hiring and retaining qualified employees
- Barriers to finding and keeping the people they need

Respondents were asked if they anticipated adding or laying off employees in the coming year, and if so, how many. The majority (51%) did not anticipate making any changes, and 1% expected to lay off employees (average=2.8 employees; median=3).

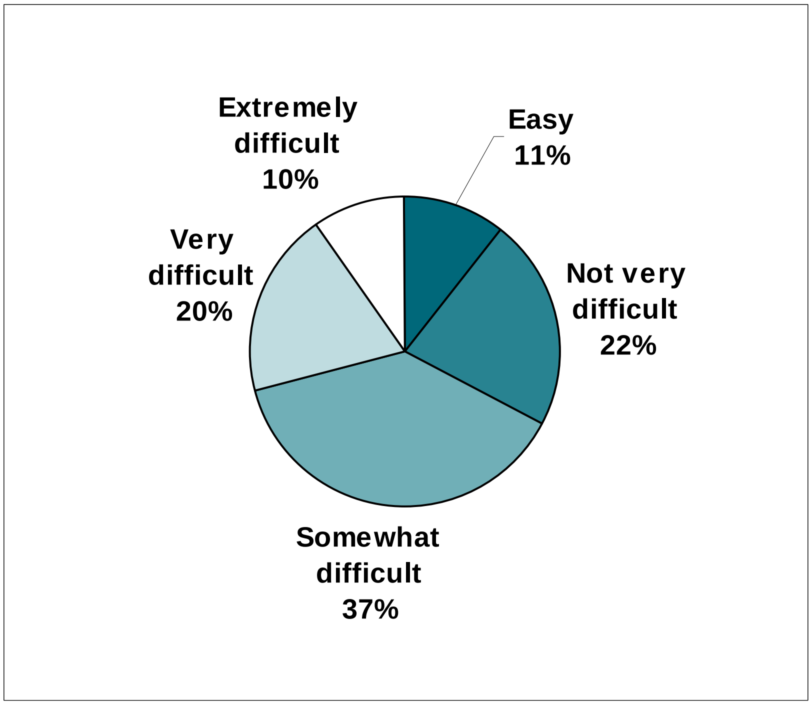
Figure 7. Employment changes over the next year (N=295)



The median number of jobs respondents expected to add was 2, with an average of 3.6. If this distribution holds for the entire population of businesses in Bellingham (estimated at 5,000), about 5,200 jobs would be added over the next year.

One-third (33%) of respondents said they found it *easy* or *not very difficult* to find and keep qualified employees. About one-third (37%) found this somewhat difficult, while nearly one-third (30%) found it very or extremely difficult. It is worth noting that 20% of respondents, or 62 businesses, did not have any employees at the time of the survey. There was no variation in responses to this question by company size, revenue or industry.

Figure 8. Ease or difficulty of finding and keeping qualified employees (N=239)

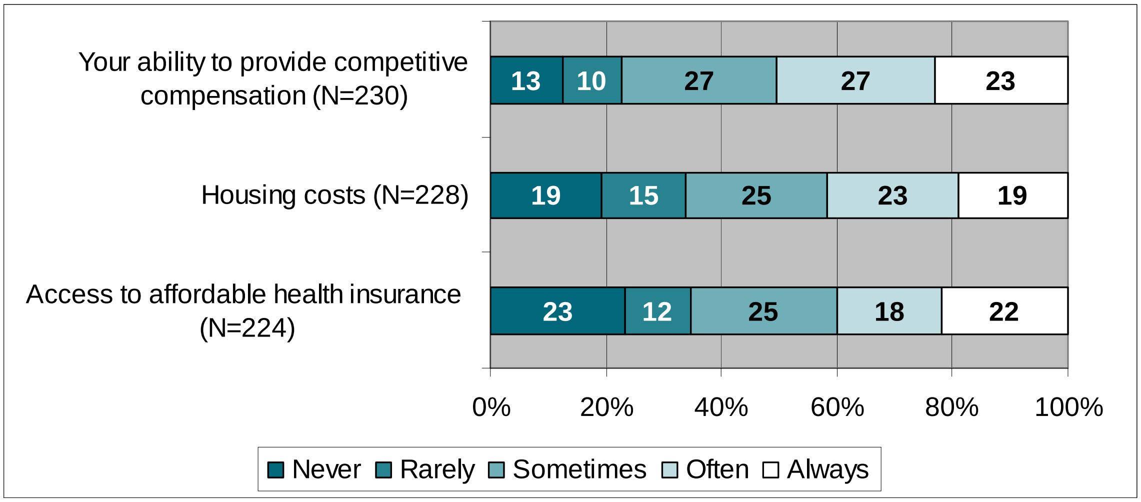


Three issues were listed to see if they ever impacted the respondent's ability to keep and hire employees. They were:

- The cost of housing in Bellingham and the surrounding area
- Access to affordable health insurance for employees, and
- The company's ability to provide competitive compensations, that is, wages and benefits.

As shown in Figure 9, the most prevalent issue for companies is being able to provide competitive compensation, followed closely by both housing costs and health insurance. There was no variation in responses to this item by company size or revenues and little variation by industry sector.

Figure 9. How often issues impact businesses' ability to attract and keep qualified employees.



Respondents were also asked if there was anything else that kept them from being able to attract or keep qualified employees. Their open-ended responses were categorized and are reported in Table 6, below. Being able to locate appropriately skilled employees was the most commonly mentioned issue.

Table 6. Is there anything else that keeps you from being able to attract or keep qualified employees?		
	N	%
Finding qualified/skilled/experienced employees	30	37%
Ability to provide compensation/benefits adequate for cost of living in Bellingham/ Minimum wage	15	19%
Small labor pool; high employment rate (NOT referring to skilled/experienced)	11	14%
City/Gov't policies, regulations, and taxes	8	10%
Bellingham demographics: students, seniors	8	10%
City/Gov't policies, regulations, and taxes	5	6%
Other	7	9%
N=81, reasons total more than 81 due to multiple responses		

BUSINESSES' LAND USE AND SPACE NEEDS

Land supply for business use is another potential area in which the city may be able to set policy or make decisions that impact businesses.

Most businesses reported using commercial office space (52%), though 30% used retail space as well. Interestingly, 17% were located in home offices and residential space. Twenty-one businesses used various other spaces: manufacturing (15), storage (8), and land (3). Two retailers also had home offices. Sales volume tended to vary with type of land use, but not in a way that was statistically significant.

Table 7. What type of space does your business currently use in Bellingham?

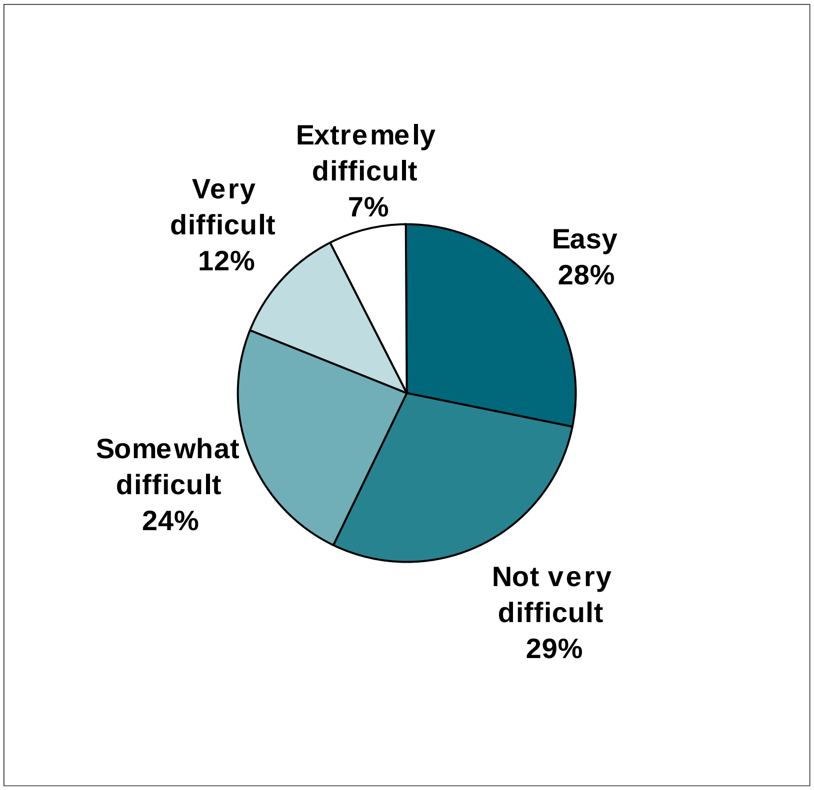
	N	%
Commercial office	149	52
Retail	87	30
Manufacturing	15	5
Storage	8	3
Land	3	1
Home office/ Residential	48	17

N=288; % sums to greater than 100 due to multiple responses

When asked, more than half (57%) of respondents said that they found it *easy* or *not very difficult* to meet their needs for space for their business. Twenty-four percent found this somewhat difficult, while 12% found it very difficult and 7% found it extremely difficult. It is worth noting that 35 respondents (12%) indicated this as "not applicable" primarily because they work from a home office.

Larger companies and those with higher sales volume were more likely to say that it had been *extremely* or *very difficult* to find the spaces they needed. Accommodation and food service was the industry group most likely to have the greatest difficulty finding the spaces needed (47% said *extremely* or *very*) followed by retailers (27%).

Figure 10. Ease or difficulty of meeting respondents' businesses needs for space (N=258)



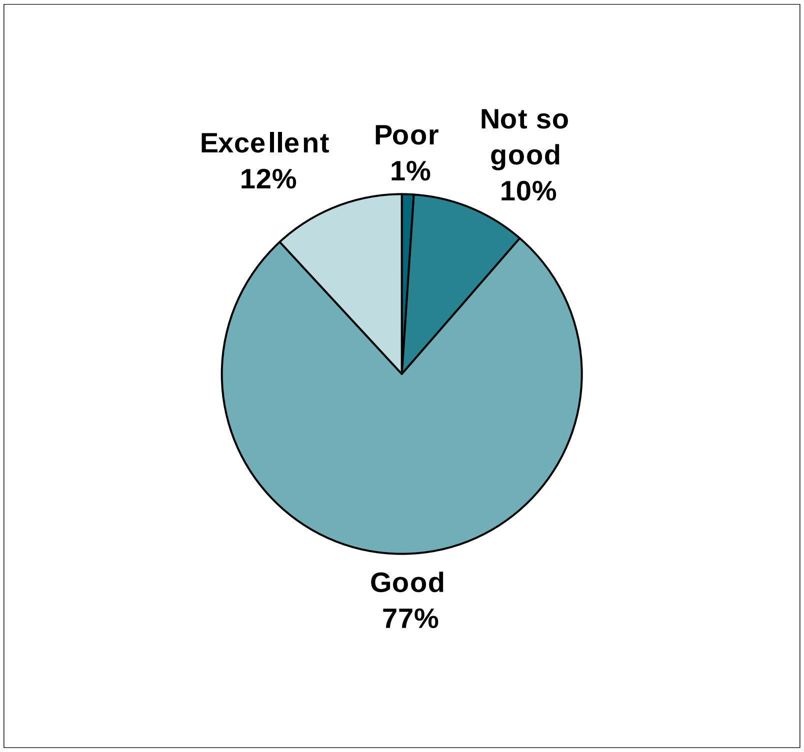
Note: 35 respondents (12%) responded *not applicable* primarily due to working from a home office.

When asked to elaborate on their answers, respondents often mentioned zoning restrictions and permitting, availability of property and the expense of property and rents as key issues. Some respondents also talked about difficulty finding spaces that are appropriate for them to expand and finding places with adequate parking.

BUSINESSES' ECONOMIC OUTLOOK FOR BELLINGHAM

More than three-quarters, or 77%, of respondents described the state of Bellingham's economy as *good*, and 12% described it as *excellent*. Ten percent described it as *not so good*, and 1% of respondents described it as *poor*.

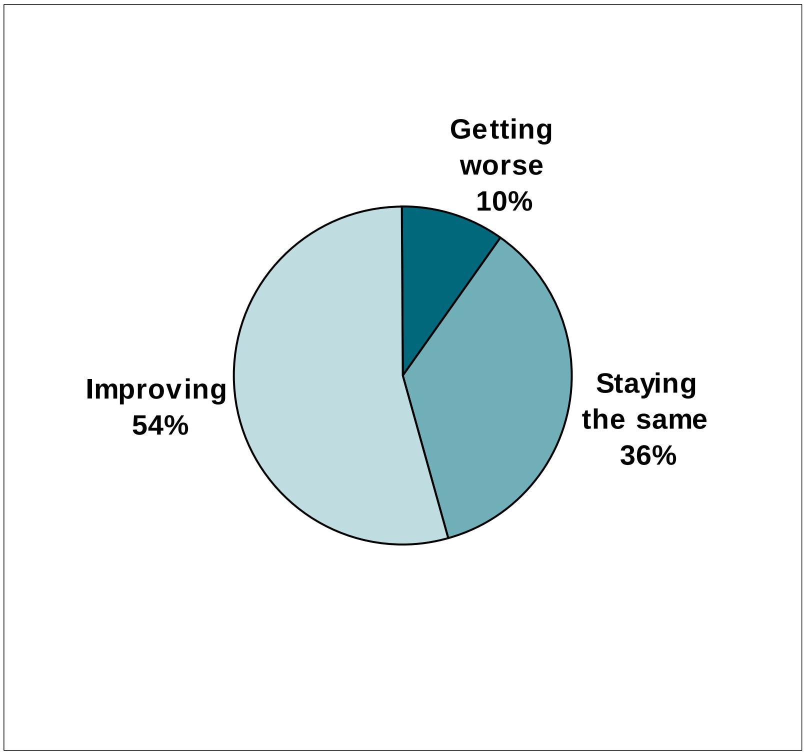
Figure 11. How would you describe the state of Bellingham's economy? (N=289)



The greatest variability in outlook came from the lowest revenue businesses. Among businesses with less than $100,000 in revenue last year, 13% described it as *poor* or *not so good*, but 21% also described it as *excellent*. No other differences were noted by sector or size.

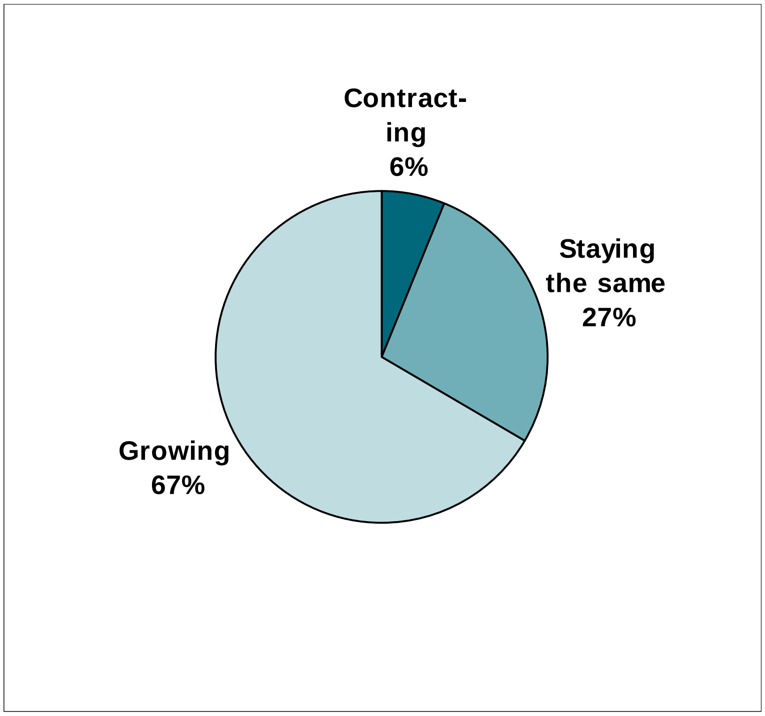
When asked about the future of Bellingham's economy, more than half (54%) think it will improve, while 36% think it will stay the same and 10% think it will get worse. Again, there was no variation by sector, size or revenues of the company.

Figure 12. Overall, how is Bellingham's economy doing? (N=289)



For 2007, two-thirds (67%) of respondents predicted that their revenues will grow. Twenty-seven percent say revenues will stay the same, and 6% say revenues will contract. Again there was no variation in responses to this question by industry sector, size or company revenues.

Figure 13. Outlook for company's revenues over the next year (N=290)



OPPORTUNITIES

The results of this survey provide a baseline of attitudes and perspectives of businesses in Bellingham, and suggest several compelling points of action for the city in the coming year. Approached intentionally, the city could leverage these findings to infuse the area's economic sustainability. It is noteworthy that the city's business support resources are for the most part well known by Bellingham business managers, but used by a small minority of them. The city and its practitioners may benefit from further research to identify gaps in support being provided and/or identifying needs being met.

Establish a Dialogue with Local Businesses

Right now, most businesses feel positively about doing business in Bellingham, so it is a good time to establish an on-going dialogue with local businesses. With larger businesses (more than 12 employees) giving significantly higher ratings to Bellingham as a place to do business, it will be especially important to involve small businesses in the conversation. Developing forums that are accessible to both large and small businesses would enable the city to collaborate with local business to identify and implement meaningful improvement actions. Sharing results from this survey about issues, such as those listed below, would introduce a comfortable approach for initiating a conversation with local businesses about topics of greatest concern.

- There is an overtone of concern over the role that business plays in the larger community, and how the city and residents view businesses – often with either indifference or offense.
- For transportation and community development services, which businesses considered important, the city received mediocre ratings.
- The survey confirms the need to support change in permitting process – work that the city is already doing.
- Survey findings also confirmed anecdotal evidence of businesses having difficulties finding employees (more detail below) and space to do business. Land supply is a particular issue for larger companies.

Help Businesses Find "Good-Match" Employees

The survey findings also confirmed anecdotal evidence of businesses having difficulties finding employees, a concern that cuts across all types of companies. By identifying the type of training and experience gaps that are in the labor market, the city could better understand specific areas for action. Three possible directions would be 1) partnering with local colleges to provide employment training to enhance the labor pool, 2) working through the city's business support services to help find resources for locating people with the skill sets needed and 3) providing training for managers through business support services regarding resources for locating potential employees.

APPENDIX A: RESEARCH METHODS

This survey project sampled from comprehensive business listings provided by two companies providing business lists for research and marketing purposes. The lists contained business contact information for the senior-most person in the company. Each sampled business was attempted eight times in a four-week period. In all, the 303 responses were collected in the 12-minute, 40 item survey. This represents a 47% response rate and a margin of error of 6%.

Table A1. Call Results Summary	
Completes	303
Soft Refusal *	5
Refused	79
No Answer/Machine/Busy	177
Callback	84
Total Valid Contact	648
Bad Number -- not a business	13
Bad Number -- number out of order	45
Bad Number -- wrong business, but still a business	12
Unavailable during the period of the study	33
Unable – Language	7
Not Qualified: not in Bellingham, etc.	39
Already Responded	5
Max Attempts (8)	26
Total Invalid Contacts	180
Total	828
Response Rate (completes/valid)	47%
Average Length of Survey	12:36

*A soft refusal is one in which the potential respondent hangs up before knowing the purpose of the survey.

DATA QUALITY

Two databases were obtained for this project – each with different methods for compiling their data. Comparisons between the full databases and the survey data showed that the distribution of surveyed businesses by industry sector did not vary substantially from those provided by the databases. Shaded rows indicate the industries that departed the most from either one or the other database.

Table A2. NAICS 2-digit categories for survey and population databases

	Survey		Dbase 1		Dbase 2	
	N	%	n	%	n	%
11 Agriculture, Forestry, Fishing and Hunting	0	0.0	15	0.3	12	0.3
21 Mining	0	0.0	5	0.1	12	0.3
22 Utilities	1	0.3	2	0.0	6	0.1
23 Construction	14	4.7	410	7.9	387	8.6
31 Manufacturing	14	4.7	207	4.0	262	5.8
42 Wholesale Trade	13	4.3	257	4.9	273	6.1
44 Retail Trade	57	18.9	812	15.6	759	16.9
48 Transportation and Warehousing	3	1.0	78	1.5	64	1.4
51 Information	5	1.7	90	1.7	65	1.4
52 Finance and Insurance	21	7.0	264	5.1	246	5.5
53 Real Estate and Rental and Leasing	15	5.0	256	4.9	254	5.6
54 Professional, Scientific, and Technical Services	38	12.6	561	10.8	504	11.2
55 Management of Companies and Enterprises	1	0.3	5	0.1	3	0.1
56 Administrative and Support and Waste Management and Remediation	7	2.3	175	3.4	134	3.0
61 Educational Services	4	1.3	45	0.9	44	1.0
62 Health Care and Social Assistance	53	17.6	925	17.8	538	12.0
71 Arts, Entertainment, and Recreation	7	2.3	98	1.9	73	1.6
72 Accommodation and Food Services	23	7.6	331	6.4	325	7.2
81 Other Services (except Public Administration)	25	8.3	644	12.4	536	11.9
92 Public Administration	0	0.0	1	0.0	1	0.0
Missing	2	0.6	24	0.5	102	2.2
Total	**303**	**100**	**5205**	**100**	**4600**	**100**

Employment reported in the sample was insignificantly different than in the databases, when using the database reported numbers.

List quality

A portion of respondents were asked to verify employment and revenue information provided by the databases.

Twenty six percent of cases had accurate information regarding the number of employees at their company, and 80% were accurate to within 5 employees. These discrepancies could be due to changes in staffing since the database was last updated, or to inaccurate reporting either during the survey or in response to the database vendor's questions.

Revenue reported in the databases were accurate for 40% of the cases, while 40% were higher and 20% were lower. Large discrepancies between the databases were seen, especially among low-revenue businesses. This marks the difficulty of obtaining accurate sales revenue data, since many companies are reluctant to disclose their revenues.

APPENDIX B: SURVEY SCRIPT AND FREQUENCY REPORT

Q1:

Overall, how would you rate Bellingham as a place to do business? Would you say it is...

N =		303	100%
Excellent	5	42	14%
Very good	4	98	32%
Good	3	103	34%
Fair	2	39	13%
Poor	1	14	5%
Don't Know (do not read)	7	3	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	3	1%

Q2:

Over the next year, are you anticipating your company's revenues will be growing, staying the same or contracting relative to the past year?

N =		303	100%
Growing	3	193	64%
Staying the same	2	79	26%
Contracting	1	18	6%
Don't Know (do not read)	7	5	2%
Not Applicable (do not read)	8	5	2%
Refused (do not read)	9	3	1%

Q3:

Over the next year, would you say you are adding new employees, laying off existing employees, neither adding or laying off employees, or that you have no employees?

N =		303	100%
Yes -- adding	1	87	29%
Yes -- laying off	2	4	1%
Neither	3	148	49%
No employees	4	56	18%
Don't Know (do not read)	7	5	2%
Not Applicable (do not read)	8	3	1%
Refused (do not read)	9	0	0%

Q3A:

How many new employees do you expect to add?
Min=1, Max=40, average 3.6, median 2.

N =		87	100%
Don't Know (do not read)	777	5	6%
Not Applicable (do not read)	888	0	0%
Refused (do not read)	999	0	0%

Q3B:

How many employees do you expect to lay off?
Min=1, Max=5, average=2.8, median=3.

N =		5	100%
Don't Know (do not read)	777	0	0%
Not Applicable (do not read)	888	0	0%
Refused (do not read)	999	0	0%

Q4:

Would you describe the state of Bellingham's economy as excellent, good, not so good, or poor?

N =		303	100%
Excellent	4	35	12%
Good	3	227	75%
Not so good	2	31	10%
Poor	1	3	1%
Don't Know (do not read)	7	4	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	2	1%

Q5:

Overall, would you say the economy in Bellingham is improving, staying the same or getting worse?

N =		303	100%
Improving	3	157	52%
Staying the same	2	103	34%
Getting worse	1	29	10%
Don't Know (do not read)	7	11	4%
Not Applicable (do not read)	8	2	1%
Refused (do not read)	9	1	0%

INFO2:

How often, if at all, do the following issues impact your ability to attract or keep qualified employees? The first one is…

N =		250	100%
hit 'enter' to continue	Y	250	100%

Q6:

The cost of housing in Bellingham and the surrounding area (Would you say this…)

N =		250	100%
Always	5	43	17%
Often	4	52	21%
Sometimes	3	56	22%
Rarely	2	33	13%
never impacts your ability to attract or keep qualified employees	1	44	18%
Don't Know (do not read)	7	11	4%
Not Applicable (do not read)	8	8	3%
Refused (do not read)	9	3	1%

Q7:

Access to affordable health insurance for employees (Would you say this…)

N =		250	100%
Always	5	49	20%
Often	4	40	16%
Sometimes	3	57	23%
Rarely	2	26	10%
never impacts your ability to attract or keep qualified employees	1	52	21%
Don't Know (do not read)	7	7	3%
Not Applicable (do not read)	8	15	6%
Refused (do not read)	9	4	2%

Q8:

Your ability to provide competitive compensation, that is wages and benefits (Would you say this…)

N =		250	100%
Always	5	53	21%
Often	4	63	25%
Sometimes	3	62	25%
Rarely	2	23	9%
never impacts your ability to attract or keep qualified employees	1	29	12%
Don't Know (do not read)	7	4	2%
Not Applicable (do not read)	8	13	5%
Refused (do not read)	9	3	1%

Q9:

Is there anything else that keeps you from being able to attract or keep qualified employees?

N =		250	100%
Other	17	7	3%
City/Gov't policies, regulations, and taxes	16	5	2%
Nature of the work: type of work, hours	14	8	3%
Ability to provide compensation adequate for cost of living in Bellingham	13	15	6%
Small labor pool; high employment rate (NOT referring to skilled/experienced)	12	11	4%
Bellingham demographics: students, seniors	15	8	3%
Finding qualified/skilled/experienced employees	11	30	12%
Yes -- please specify	1	0	0%
No	0	160	64%
Don't Know (do not read)	7	2	1%
Not Applicable (do not read)	8	6	2%
Refused (do not read)	99	1	0%

Q10:

How easy or difficult has it been to find qualified employees to work in your business? Would you say it's been...

N =		250	100%
Extremely difficult	1	23	9%
Very difficult	2	47	19%
Somewhat difficult	3	91	36%
Not very difficult	4	52	21%
Easy	5	26	10%
Don't Know (do not read)	7	1	0%
Not Applicable (do not read)	8	9	4%
Refused (do not read)	9	1	0%

Q11:

What type of space does your business currently use in Bellingham? [prompt if necessary - check all that apply]

N =		303	100%
Commercial office space	1	149	49%
Retail	2	87	29%
Manufacturing	3	15	5%
Storage	4	8	3%
Land	5	3	1%
Home office / Residential space	6	48	16%
Don't Know (do not read)	7	4	1%
Not Applicable (do not read)	8	10	3%
Refused (do not read)	9	1	0%

Q12:

How easy or difficult has it been for you to find the physical space you need to do business or expand your business in the city? Would you say it has been…

N =		303	100%
Extremely difficult	1	19	6%
Very difficult	2	30	10%
Somewhat difficult	3	62	20%
Not very difficult	4	74	24%
Easy	5	73	24%
Don't Know (do not read)	7	8	3%
Not Applicable (do not read)	8	35	12%
Refused (do not read)	9	2	1%

Q12A:

Could you tell me more about that?

N =		111	100%
hit 'enter' to record response	1	107	96%
No	0	4	4%
Don't Know (do not read)	7	0	0%
Not Applicable (do not read)	8	0	0%
Refused (do not read)	9	0	0%

Q13:

How well prepared would you say the company is to handle a natural disaster or state of emergency? Would you say it is...

N =		303	100%
Extremely	5	24	8%
Very	4	75	25%
Somewhat	3	122	40%
Not very	2	39	13%
Not at all prepared	1	28	9%
Don't Know (do not read)	7	7	2%
Not Applicable (do not read)	8	5	2%
Refused (do not read)	9	3	1%

Q16:

If you could change anything about doing business in Bellingham, what would you change?

N =		303	100%	
Refused/no responce/adverticing	99	72	24%	
Don't know	77	7	2%	
Other	11	19	6%	
Nothing	10	10	3%	
Competition issues	15	4	1%	
Customer/clientele concerns	14	4	1%	
Issues of Location: must do business outside B'ham, trying to move	12	7	2%	
Improve aesthetics (homeless people; beautification)	09	6	2%	
Labor pool issues	08	10	3%	
Cost of doing business/ adverticing	07	6	2%	
Transportation (improve/expand transit infrastructure)	06	31	10%	
Growth and expansion of businesses (assistance to existing businesses; attracting new businesses; sustainabilty)	05	27	9%	
Cost of living (affordible house/healthcare; living wages)	04	14	5%	
Government's/citizens' unwillingness to help businesses; discontent with leadership (inefficiency, anti-business attitude)	03	43	14%	
Too many regulations (difficult permit process; too many laws regarding building)		02		36
Taxes (restructure/remove B & O Tax; to many/high; disproportional)	01	38	13%	

INFO3:

The next questions have to do with the city government and city services. First I'm going to ask you to rate the importance of several city services for your business, and then I'll ask you to rate how well the city does in providing them. Thinking specifically about your business, how important is…

N =		303	100%
(Press ENTER to continue)	Y	303	100%

Q17:

(Thinking specifically about your business, how important is…) Elected Leadership including the City Council and Mayor's office

N =		303	100%
Extremely	5	47	16%
Very	4	100	33%
Somewhat	3	79	26%
A little	2	28	9%
Not at all	1	33	11%
Don't Know (do not read)	7	8	3%
Not Applicable (do not read)	8	4	1%
Refused (do not read)	9	4	1%

Q18:

(Thinking specifically about your business, how important is…) Public involvement including Advisory Boards and Commissions

N =		303	100%
Extremely	5	26	9%
Very	4	84	28%
Somewhat	3	84	28%
A little	2	35	12%
Not at all	1	59	19%
Don't Know (do not read)	7	9	3%
Not Applicable (do not read)	8	4	1%
Refused (do not read)	9	2	1%

Q19:

(Thinking specifically about your business, how important is…) Community Development including land use planning, environmental protection, building safety inspection, permitting and economic development

N =		303	100%
Extremely	5	74	24%
Very	4	98	32%
Somewhat	3	82	27%
A little	2	17	6%
Not at all	1	24	8%
Don't Know (do not read)	7	4	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	3	1%

Q20:

(Thinking specifically about your business, how important is…) Public Safety including police & fire protection and emergency medical services

N =		303	100%
Extremely	5	85	28%
Very	4	129	43%
Somewhat	3	57	19%
A little	2	13	4%
Not at all	1	14	5%
Don't Know (do not read)	7	2	1%
Not Applicable (do not read)	8	3	1%
Refused (do not read)	9	0	0%

Q21:

(Thinking specifically about your business, how important is…) Cultural and recreational programs and facilities such as Parks and Open Space; Recreation; Libraries; Theaters and Museums

N =		303	100%
Extremely	5	46	15%
Very	4	93	31%
Somewhat	3	77	25%
A little	2	29	10%
Not at all	1	49	16%
Don't Know (do not read)	7	3	1%
Not Applicable (do not read)	8	6	2%
Refused (do not read)	9	0	0%

Q22:

(Thinking specifically about your business, how important is…) Transportation including street maintenance and lighting; traffic management; Bicycle and pedestrian access; Parking

N =		303	100%
Extremely	5	65	21%
Very	4	130	43%
Somewhat	3	62	20%
A little	2	18	6%
Not at all	1	25	8%
Don't Know (do not read)	7	2	1%
Not Applicable (do not read)	8	0	0%
Refused (do not read)	9	1	0%

Q23:

(Thinking specifically about your business, how important is…) Utilities, including Water, Sewer, and Storm Drainage

N =		303	100%
Extremely	5	71	23%
Very	4	133	44%
Somewhat	3	66	22%
A little	2	11	4%
Not at all	1	18	6%
Don't Know (do not read)	7	1	0%
Not Applicable (do not read)	8	3	1%
Refused (do not read)	9	0	0%

INFO4:

Now, how would you rate how well the City of Bellingham does in providing each of the following services?

N =		303	100%
hit 'enter' to continue	Y	303	100%

Q24:

(How would you rate how well the City of Bellingham does in providing...) Elected Leadership including the City Council and Mayor's office

N =		303	100%
Extremely	5	7	2%
Very	4	69	23%
Somewhat	3	141	47%
Not very -- "can you tell me more about that?"	2	29	10%
Not at all well -- "can you tell me more about that?"	1	21	7%
Don't Know (do not read)	7	22	7%
Not Applicable (do not read)	8	7	2%
Refused (do not read)	9	7	2%

Q25:

(How would you rate how well the City of Bellingham does in providing...) Public involvement including Advisory Boards and Commissions

N =		303	100%
Extremely	5	11	4%
Very	4	82	27%
Somewhat	3	124	41%
Not very -- "can you tell me more about that?"	2	21	7%
Not at all well -- "can you tell me more about that?"	1	17	6%
Don't Know (do not read)	7	38	13%
Not Applicable (do not read)	8	4	1%
Refused (do not read)	9	6	2%

Q26:

(How would you rate how well the City of Bellingham does in providing...) Community Development including land use planning, environmental protection, building safety inspection, permitting and economic development

N =		303	100%
Extremely	5	13	4%
Very	4	65	21%
Somewhat	3	131	43%
Not very -- "can you tell me more about that?"	2	48	16%
Not at all well -- "can you tell me more about that?"	1	30	10%
Don't Know (do not read)	7	11	4%
Not Applicable (do not read)	8	4	1%
Refused (do not read)	9	1	0%

Q27:

(How would you rate how well the City of Bellingham does in providing...) Public Safety including police & fire protection and emergency medical services

N =		303	100%
Extremely	5	58	19%
Very	4	181	60%
Somewhat	3	46	15%
Not very -- "can you tell me more about that?"	2	10	3%
Not at all well -- "can you tell me more about that?"	1	1	0%
Don't Know (do not read)	7	7	2%
Not Applicable (do not read)	8	0	0%
Refused (do not read)	9	0	0%

Q28:

(How would you rate how well the City of Bellingham does in providing...) Cultural and recreational programs and facilities such as Parks and Open Space; Recreation; Libraries; Theaters and Museums

N =		302	100%
Extremely	5	58	19%
Very	4	171	57%
Somewhat	3	56	19%
Not very -- "can you tell me more about that?"	2	3	1%
Not at all well -- "can you tell me more about that?"	1	1	0%
Don't Know (do not read)	7	8	3%
Not Applicable (do not read)	8	4	1%
Refused (do not read)	9	1	0%

Q29:

(How would you rate how well the City of Bellingham does in providing...) Transportation including street maintenance and lighting; traffic management; Bicycle and pedestrian access; Parking

N =		303	100%
Extremely	5	20	7%
Very	4	102	34%
Somewhat	3	128	42%
Not very -- "can you tell me more about that?"	2	33	11%
Not at all well -- "can you tell me more about that?"	1	13	4%
Don't Know (do not read)	7	5	2%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	1	0%

Q30:

(How would you rate how well the City of Bellingham does in providing...) Utilities, including Water, Sewer, and Storm Drainage

N =		303	100%
Extremely	5	31	10%
Very	4	184	61%
Somewhat	3	59	19%
Not very -- "can you tell me more about that?"	2	15	5%
Not at all well -- "can you tell me more about that?"	1	4	1%
Don't Know (do not read)	7	8	3%
Not Applicable (do not read)	8	2	1%
Refused (do not read)	9	0	0%

INFO5:

One strategy the city has used for economic development is to provide funding for six local agencies. The city would like to know if you've used any of the agencies for information or business-development services. If you haven't heard of the agency, that would also be useful information. The first one is…

N =		303	100%
hit 'enter' to continue	Y	303	100%

Q31:

The Small Business Development Center

N =		303	100%
Yes, have used them for information or services	3	75	25%
No, but am aware of the organization	2	144	48%
No, and haven't heard of organization	1	80	26%
Don't Know (do not read)	7	3	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	0	0%

Q32:

SCORE [Service Corps of Retired Executives]

N =		303	100%
Yes, have used them for information or services	3	32	11%
No, but am aware of the organization	2	113	37%
No, and haven't heard of organization	1	154	51%
Don't Know (do not read)	7	3	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	0	0%

Q33:

Sustainable Connections

N =		303	100%
Yes, have used them for information or services	3	63	21%
No, but am aware of the organization	2	106	35%
No, and haven't heard of organization	1	131	43%
Don't Know (do not read)	7	2	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	0	0%

Q34:

Economic Development Council

N =		303	100%
Yes, have used them for information or services	3	30	10%
No, but am aware of the organization	2	191	63%
No, and haven't heard of organization	1	78	26%
Don't Know (do not read)	7	3	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	0	0%

Q35:

Downtown Renaissance Network

N =		303	100%
Yes, have used them for information or services	3	34	11%
No, but am aware of the organization	2	141	47%
No, and haven't heard of organization	1	123	41%
Don't Know (do not read)	7	3	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	1	0%

Q36:

Technology Alliance Group

N =		303	100%
Yes, have used them for information or services	3	10	3%
No, but am aware of the organization	2	49	16%
No, and haven't heard of organization	1	241	80%
Don't Know (do not read)	7	2	1%
Not Applicable (do not read)	8	1	0%
Refused (do not read)	9	0	0%

Q37:

Are there any other local agencies or organizations that you use for information or business-development services?

N =		303	100%
Nationwide resources (including local chapters) e.g. Kiwanis, BBB	19	20	7%
Government agencies	18	12	4%
Other	20	6	2%
Local Resources (Whatcom-specific) e.g. ReSources, tourist bureau	16	31	10%
Learning institutions (colleges, universities, libraries)	15	12	4%
Chamber of Commerce	11	27	9%
Yes -- "can you tell me which ones?"	1	0	0%
No	0	206	68%
Don't Know (do not read)	7	5	2%
Not Applicable (do not read)	8	0	0%
Refused (do not read)	9	0	0%

INFO6:

My last questions have to do with the characteristics of your business.

N =		303	100%
hit 'enter' to continue	Y	303	100%

Q39:

Would you tell me how many employees are currently working in the company?

N =		233	100%
Don't Know (do not read)	7777	0	0%
Not Aplicable (do not read)	8888	0	0%
Refused (do not read)	9999	1	0%

Q38:

Can I verify that you have <SIZE> employees in your company? [Includes owner]

N =		87	100%
Correct	1	34	39%
Not Correct	2	50	57%
Don't Know (do not read)	7	0	0%
Not Applicable (do not read)	8	1	1%
Refused (do not read)	9	2	2%

Q38A:

Would you tell me how many employees are currently working in the company? [Includes owner]

N =		50	100%
Don't Know (do not read)	7777	0	0%
Not Applicable (do not read)	8888	0	0%
Refused (do not read)	9999	0	0%

Q42:

What were the total gross revenues from your business location in the last fiscal year? Would you say…

N =		240	100%
Under $100,000	01	28	12%
$100,000 to under $500,000	02	67	28%
$500,000 to under 1 million	03	31	13%
1 million to under 2.5 million	04	29	12%
2.5 million to under 5 million	05	12	5%
5 million to under 10 million	06	6	3%
10 million or more	07	9	4%
Don't Know (do not read)	77	16	7%
Not Applicable (do not read)	88	10	4%
Refused (do not read)	99	32	13%

Q40:

Would you confirm that your company did <INCOM> in gross revenues last year?

N =		63	100%
Correct	1	21	33%
Not Correct	2	32	51%
Don't Know (do not read)	7	1	2%
Not Applicable (do not read)	8	5	8%
Refused (do not read)	9	4	6%

Q40A:

Would you tell me the total gross revenues from your business location in the last fiscal year? Would you say…

N =		32	100%
Under $100,000	01	19	59%
$100,000 to under $500,000	02	3	9%
$500,000 to under 1 million	03	4	13%
1 million to under 2.5 million	04	1	3%
2.5 million to under 5 million	05	0	0%
5 million to under 10 million	06	0	0%
10 million or more	07	1	3%
Don't Know (do not read)	77	3	9%
Not Applicable (do not read)	88	0	0%
Refused (do not read)	99	1	3%

Q41:

How many years has the business been operating in Bellingham?

N =		303	100%
Don't Know (do not read)	777	3	1%
Not Applicable (do not read)	888	1	0%
Refused (do not read)	999	0	0%

Q43:

How many years have you been in your current position in the company?

N =	282	100%
Don't Know (do not read) ... 777	0	0%
Not Applicable (do not read) ... 888	1	0%
Refused (do not read) ... 999	0	0%

QCMT:

Comment Box (do not prompt)

N =	303	100%
[hit 'enter' to continue] ... Y	303	100%

INT98:

It seems that you are not eligible to participate in this survey. Thank you for your time, and have a good day.

N =	0	100%
Not a Qualified Business ... 19	0	0%

INT99:

[INT99] That is the end of the survey. Thank you very much for your time and feedback. Have a good day.

N =	303	100%
Complete ... 08	303	100%