

APPENDIX I:
**Mitigating Business Losses: Services, Strategies, and
Effectiveness**



Mitigating business losses: services, strategies, and effectiveness

*A survey of businesses affected by
Central Corridor Light Rail construction*

O C T O B E R 2 0 1 2

Mitigating business losses: services, strategies, and effectiveness

*A survey of businesses affected by
Central Corridor Light Rail construction*

October 2012

Prepared by:

Cael Warren, Brian Pittman, and Ellen Shelton

Wilder Research
451 Lexington Parkway North
Saint Paul, Minnesota 55104
651-280-2700
www.wilderresearch.org

Contents

Summary	1
Introduction and background	6
Central Corridor Light Rail.....	6
Central Corridor Funders Collaborative	6
Business Resources Collaborative	7
Methods.....	7
Characteristics and demographics.....	10
Survey respondents	10
Businesses	11
Construction-related impacts	13
Groups affected by construction	15
Geographic distribution of construction and businesses.....	16
External services	17
Service participants	20
Reasons for participation	21
Service effectiveness.....	21
Additional service needs	28
Internal strategies	29
Businesses implementing mitigation strategies	30
Effectiveness of mitigation strategies	32
Business perceptions of future outlook.....	34
Construction impact and future outlook	36
Service use and future outlook.....	38
Business strategies and future outlook.....	40
Issues to consider	42
Theory of construction mitigation	42
Successful implementation of services	43
Challenges and opportunities	43
Conclusion	44
Appendix.....	46
Figures.....	46
Survey instrument	65

Figures

1. Sampling and response rate	8
2. Respondent demographics	10
3. Business types and sizes	11
4. Length of time business has been in operation (at current location and at any location)	12
5. Level of construction and construction-related disruptions	13
6. How much was your business impacted because... ..	14
7. How informed were you about... ..	15
8. Map of 2011 construction and distribution of surveyed businesses	16
9. Participation in construction impact mitigation services (among all respondent businesses).....	18
10. Awareness of services and communication efforts (among only the respondent businesses <i>not</i> sampled based on service participation)	19
11. Primary reasons for nonparticipation in services.....	20
12. Primary reasons for participation in services.....	21
13. How effective was the program in... ..	23
14. Overall, how would you rate the effectiveness of the program?	24
15. Overall, how would you rate the effectiveness of the program?	25
16. What was the best thing about the [program]?	26
17. How could the [program] be improved?.....	27
18. Interest in services.....	28
19. Construction mitigation strategies	29
20. Number of internal strategies implemented, by respondent demographics.....	30
21. Number of internal strategies implemented, by type of business	31
22. Number of strategies implemented by business characteristics.....	31
23. How effective was the [strategy] in... ..	33
24. Over the next five years, do you expect... ..	35
25. Do you expect this business will be operating in its current location in FIVE YEARS?.....	36
26. Over the next five years, do you expect... ..	37
27. Do you expect this business will be operating in its current location in FIVE YEARS?.....	38

Figures (continued)

28. Over the next five years, do you expect.....	39
29. Do you expect this business will be operating in its current location in FIVE YEARS?.....	40
30. Over the next five years, do you expect.....	41
31. Theory of construction mitigation	42

Acknowledgments

Wilder Research would like to thank the Central Corridor Funders Collaborative and Business Resources Collaborative for their generous guidance and support throughout this research process. In particular, thanks go to Jonathan Sage-Martinson and Chris Ferguson for their help strategizing and encouraging this important study. We would also like to thank the individuals and organizations that helped pull together information about the businesses, the services available, and service use on the corridor, or assisted in providing feedback or information for the survey instrument or report. This includes Nancy Homans at the Mayor's Office of the City of Saint Paul; Robin Caufman, Lee Shoua, and Daniel Pfeiffer at the Metropolitan Council; Kari Canfield of the Midway Chamber of Commerce; and Isabel Chanslor of the Neighborhood Development Center.

Wilder Research staff who contributed to this report includes (in alphabetical order):

Abigail Struck
Amanda Peterson
Ben Bushee
Cheryl Bourgeois
Dan Swanson
Diane Elwood
Emily Sjostrom
Jacqueline Campeau
Janelle Felker
Jennifer Bohlke
Lue Thao
Margaree Levy
Margie Peterson
Marilyn Conrad
Mark Anton
Mary Ann Thoma
Phil Cooper
Rena Cleveland
Rose Lobley
Ryan McArdle
Teri Libro
Zeinab Khalif

And finally, a special thank you goes out to all of the business owners, managers, and other staff who took time out of their day during this critical time to answer our questions and provide this important information. Without them, this study would not have been possible.

Summary

In the fall of 2011, the Central Corridor Funders Collaborative (CCFC), on behalf of the Business Resources Collaborative (BRC), asked Wilder Research to conduct a survey about the services and strategies to mitigate business losses during construction of the Central Corridor Light Rail.

This study conducted surveys in person and over the phone with owners and managers of 201 businesses on the route of the Central Corridor Light Rail between March and June 2012. This survey is intended to help understand the types of assistance and mitigation efforts businesses utilized, the effectiveness of these efforts, the ways assistance can be improved, and lessons or knowledge to inform similar projects in the future. Respondents were asked about their experiences with specific services available including the Small Business Loan Program, the Parking Loan Program, services provided by the U7 collaborative, the “Buy Local” coupon book, and the Progressive Dinner organized in December 2012. Respondents were also asked about any mitigation efforts they had undertaken on their own including additional marketing, signage, and promotions as well as the Metropolitan Council Project Office’s communications efforts to promote businesses on the corridor

Almost three-quarters (72%) of respondents were male, and 44 percent were people of color. Almost one-third (31%) were foreign-born, and another 10% were first-generation. Businesses were primarily retail, grocery, and convenience stores (30%); restaurants, bars and other hospitality or recreation (22%); nonprofessional services (21%); or professional services (15%). Two-thirds (64%) of the businesses had been at their location on the corridor since before 2005.

Most respondents reported either significant (63%) or minor (17%) construction in front of their business during the year before the survey. Types of disruptions included reduced sidewalk access in front of their business (53%), closure of the street for longer than a month (52%), loss of on-street parking (51%), and loss of off-street parking (27%). Respondents also reported their customers had difficulty navigating to their businesses (80%); fewer customers because they heard the business was hard to access (73%); less automobile traffic in front of their business (73%); excess noise, dust, and other disruptions (72%); and fewer pedestrians in front of their business (63%).

When asked about construction-related communications, one-half (49%) of respondents reported being very informed about who to contact about issues encountered, 44 percent were very informed about the construction schedule, 36 percent were very informed

about utility outages, and 35 percent were very informed about road and sidewalk closures.

Successful implementation of services

This study suggests that the services administered on the corridor have been successful in their implementation. In particular, there has been high general satisfaction with the services from what respondents consider to be well-designed programs.

- **General effectiveness and satisfaction.** Survey respondents gave relatively high ratings for the overall effectiveness of and their overall satisfaction with the services they received.
- **Well-designed programs.** Findings suggest that the services were designed well to encourage participation and be user-friendly.

Reasons for participation

Participants in the Parking (100%) and Small Business (76%) Loan Programs generally reported that a primary reason for their participation was that the programs met a specific need for the business. Many respondents (78% Parking and 62% Small Business) also reported that the favorable terms or requirements of the programs were primary reasons for participating. Among “Buy Local” coupon book participants, the most commonly reported reason for participation (52%) was that they were asked to do so.

Service effectiveness and strengths

The services available to corridor businesses aimed to serve two distinct but related purposes. While the Small Business Loan program, the Parking Loan program, and the U7 services generally aimed to compensate for lost revenue due to construction, the “Buy Local” coupon book, Progressive Dinner, and Project Office communication efforts were designed to increase customer traffic, thereby generating additional revenue.

In general, the services intended to compensate for revenue losses were rated higher in overall effectiveness (80-90% somewhat or very effective) compared to those intended to increase customer traffic (50-70%). The financial support provided was the primary strength identified for the revenue compensation services while the low cost and exposure to customers were the primary strengths identified for the services intended to increase customer traffic.

Internal strategies

Along with the external service and assistance the businesses may have received, they were also asked about any strategies they had implemented themselves that were intended to mitigate the negative effects of construction. Just over one-half (55%) of respondents reported that their business had implemented at least one strategy to mitigate the effects of construction.

- 32% put up **additional signage** near their business to help customers navigate traffic or to indicate the business was open during construction. On average, they spent \$661 on this strategy and 60% report it was effective in increasing customer traffic.
- 29% provided **additional promotional offers** (coupons, deals, etc.) to help generate customer traffic during the construction. On average, they spent \$2,115 on this strategy and 66% report it was effective in increasing customer traffic.
- 18% purchased **additional advertising** (TV, radio, or print) to help generate customer traffic during construction. On average, they spent \$1,993 on this strategy and 57% report it was effective in increasing customer traffic.

Business perceptions of future outlook

Three-quarters (76%) of all the businesses surveyed reported that they expect their business to be operating in its current location in five years, 16 percent did not expect their business to be in operation at this location in five years, and 9 percent did not know if their business will be in operation at their current location in five years.

Respondents from businesses that had reported construction disruptions in the year before the survey were slightly less likely than those who had not experienced disruptions to report that they expect to be in business at their current location in five years (74% to 80%). This difference is due to a higher level of uncertainty (12% compared to 2% reporting “don’t know”) among those experiencing disruptions rather than the expectation that they will no longer be operating at their current location (15% compared to 19%). For the most part, the outlook of respondents was consistent whether they received services or not. However, the most positive response (82% reporting they will be in business in their current location in five years) was from businesses that had not received services *and* had not experienced construction.

The primary reasons respondents reported they did not think their business would be operating at that location in five years were an uncertain future; severe financial losses; not wanting to stay in the area; or a pending or future building eviction.

When asked to state expectations measures of business health over the coming years, the majority of respondents expected at least small increases in sales (64%), profits (61%), and employee wages (53%).

Challenges and opportunities

While the overall findings are positive, a couple of key areas to consider may help to strengthen the programs and ensure the greatest possible impact in future iterations of the programs.

- **Specific effectiveness is unclear.** Respondents rated the effectiveness of specific aspects of the services and assistance lower than their overall effectiveness. This suggests either that the services provide value beyond their specific goals or that the particularly valuable aspects of the program were not measured.
- **Outreach is critical to participation.** Many respondents who participated in programs indicated they did so because they were asked to. However, overall awareness of the programs was relatively low.

Suggestions for improvements to services

Participant suggestions for program improvement varied widely by program. In the case of the Small Business and Parking Loan Programs, respondents most commonly suggested that the programs disburse more funds, and many said they had no suggestions for program improvement. A few suggested, however, that the program broaden the eligibility criteria and improve the timeliness of service delivery.

Participants in the U7 services also suggested that the program improve the timeliness of service delivery, but nearly as many said they had no suggestions for program improvement. Those participating in the “Buy Local” coupon book and the Progressive Dinner suggested that the programs could be improved by getting greater participation (customers and businesses) in the programs. Those familiar with the Project Office’s communication efforts suggested that the information provided be more timely and accurate, that the Project Office conduct more outreach, and that they communicate with businesses in person rather than via phone, mail, or email.

Additional service needs

Most respondents reported that financial assistance for marketing, promotion, or advertising (80%), low- or no-interest operating loans (75%), technical assistance for marketing or promotion (77%), and technical assistance for business planning or strategy (65%) would be at least somewhat helpful.

Conclusion

Many factors affect business health besides the services and strategies measured in this study. This prevents us from drawing a conclusive determination regarding the impact of the services offered to mitigate the negative effects of Central Corridor Light Rail construction. However, there is evidence that services effectively reach those who need them the most, and provide a diverse range of options to meet a variety of needs. The groups that experienced the most intense construction impact disproportionately received the most highly rated services.

In addition, the variation of participation rates among different types of owner characteristics and types of services is an indication that businesses were able to choose services that most closely met their needs. This range of service options is critical to the programs' success, both individually and as a package of services to benefit the corridor, and helps to efficiently allocate scarce support resources.

This study only focuses on the first year of Central Corridor Light Rail construction. Examination of services and impacts during subsequent years of construction, and into operational service of the line, will increase understanding of the total effect of the construction and mitigation efforts.

Introduction and background

In the fall of 2011, the Central Corridor Funders Collaborative, on behalf of the Business Resources Collaborative, asked Wilder Research to conduct a survey about services and strategies to mitigate business losses during the construction of the Central Corridor Light Rail.

This study is intended to address the following questions:

1. What types of assistance are businesses using? What other ways are businesses working to mitigate their losses? What are their reasons for using or not using the various types of mitigation?
2. Are efforts to mitigate losses due to light rail construction effective? If so, what are the most effective methods of mitigation and how have they been effective?
3. What can be improved with the assistance businesses received? How can the assistance more effectively address construction-related business needs?
4. What lessons or knowledge can be used to help businesses prepare for future light rail construction?

Central Corridor Light Rail

The “Central Corridor” is the common name used to refer to the 11-mile light rail line currently under construction between the Minneapolis and Saint Paul downtowns. The name is also sometimes applied to the neighborhoods surrounding the line. Construction on the rail line began in the spring of 2011 and is set to begin operations in 2014. This stretch will become the eastern portion of the Metro Transit Green Line, which will later also include a western portion extending from downtown Minneapolis into the southwestern suburbs.

Central Corridor Funders Collaborative

The Central Corridor Funders Collaborative (CCFC), established in 2008, is a collection of local and national funders working on development issues surrounding the Central Corridor Light Rail build-out. The CCFC describes their mission as “investing beyond the rail” by promoting learning, building shared solutions, and investing capital. The CCFC seeks to invest \$20 million in the Central Corridor over 10 years through their Catalyst Fund. The Catalyst Fund primarily funds planning, implementation, research, and evaluation. The primary values that inform the CCFC and its work include *participation*,

fairness, comprehensive solutions, sustainability, and healthy living. For more information about the Central Corridor Funders Collaborative and its work, visit their website at www.funderscollaborative.org.

Business Resources Collaborative

The Business Resources Collaborative (BRC) convenes members of the business community, local nonprofit and community organizations, and public sector partners to focus on the economic and business health of the corridor. Its purpose, as described on the CCFC website, is as follows:

The Business Resources Collaborative (BRC) was created to support businesses and property owners through this changing market. The BRC is a partnership of business coalitions, nonprofit community developers and local and regional governments. Our goal is to coordinate the delivery of a comprehensive, integrated mix of services that will support area businesses and property owners before, during, and after [light rail transit] construction.
(<http://www.funderscollaborative.org/partners/business-development-group>)

Methods

As noted above, the intent of this study is to deepen understanding about the business loss mitigation strategies implemented in the Central Corridor, look for ways to improve on those strategies, and better prepare for future mitigation efforts. This section provides an overview of the methodology this study uses to address the research questions.

It is thought that the effects of light rail construction disproportionately affect those businesses fronting the light rail line, so this study only samples businesses with addresses on streets that will carry the Central Corridor Light Rail. For the downtown Saint Paul section of the corridor, this includes only businesses on the street level. Downtown Minneapolis businesses are excluded from this study because there is no significant Central Corridor light rail construction scheduled for that area. Businesses fitting these criteria were identified through three lists of businesses kept by organizations working with businesses on the corridor.

This study seeks to understand more about the conditions and effects of construction on for-profit business, so all nonprofit or community organizations and government offices were screened out of participation. Large nonprofit clinics and hospitals were also screened out, but small private practice offices (e.g., eye care, chiropractors, and dentists) and other professional offices are included in the sample. In total, 1,144 businesses were identified in the corridor.

Furthermore, because this study is intended to understand the effect of services in the mitigation efforts, businesses who received any of the four primary services associated with the mitigation efforts (see page 17) were automatically included in the sample. These businesses were identified through lists of participants provided by the various programs. Interviewers attempted to contact 73 Small Business Loan Program participants, 22 “Buy Local” coupon book participants, 20 Parking Loan Program participants, and 12 Progressive Dinner participants.

It was also important for the study to survey individuals with key roles and understanding of the businesses sampled. Therefore, it was requested that either an owner or manager complete the survey.

The survey instrument was developed with feedback from the Business Resources Collaborative and Central Corridor Funders Collaborative staff. Because of this study’s focus on mitigation strategies, most of the survey instrument content consists of a series of questions about services and mitigation strategies implemented. However, additional questions were also asked about the level and types of construction disruption experienced by the businesses, characteristics of the business, demographics of the respondent, and the future outlook for the business. The complete survey instrument is available in the appendix.

Overall, 201 businesses were surveyed between March and June 2012 with a response rate of 60 percent (see Figure 1). Wilder’s trained survey interviewer staff first contacted respondents at the location of their business, and completed the survey at that time if the respondents were available and willing. If the interview could not be completed during that visit, contact information was gathered to follow up by telephone.

1. Sampling and response rate

Total number of businesses identified in the corridor	1,144
Number of businesses attempted to contact	456
Not eligible (vacant, closed/moved, nonprofit or government, etc.)	119
Eligible: did not complete	136
Refusals	63
Language barrier	8
Unable to contact (8-12+ contacts)	57
Break-offs (started interview but did not complete)	8
Total completes	201
Total eligible sample (did not complete + completes)	337
Response rate (completes/eligible sample)	60%

Data from the surveys were cleaned, coded, and entered into a dataset, and analyzed using SPSS statistical analysis software. Statistical analyses primarily consisted of frequency distributions and cross-tabular analyses.

Characteristics and demographics

This section provides an overview of the characteristics of the individuals who completed the survey and of the businesses they represent.

Survey respondents

As noted in the methods section, this study specifically targeted survey respondents who were owners or managers of the businesses selected to participate. More than two-thirds (68%) of the respondents were either the sole owner (43%) or a co-owner (25%) of the business (Figure 2). Another 28 percent of survey respondents represent the business as a manager. Only five percent of survey respondents were neither an owner nor a manager, and these respondents included family members, administrative assistants, and other staff.

Sixty-nine percent of the survey respondents were born in the U.S., and 10 percent were first-generation (U.S.-born with at least one foreign-born parent). Over half were white, one-fifth Asian, one-tenth African-born, and several others were black, American Indian, multiracial, or some other race. Nearly three-quarters (72%) of respondents were male.

2. Respondent demographics

Gender (N=200)	Number	Percent
Male	144	72%
Female	56	28%
Race and ethnicity (N=194)		
African American or Black (non-Hispanic)	14	7%
African Born	21	11%
Asian or Pacific Islander (non-Hispanic)	35	18%
Other (includes American Indian and Multiracial, non-Hispanic)	9	5%
Hispanic (Any race)	7	4%
Respondents of color (total)	86	44%
White or Caucasian (non-Hispanic)	108	56%
Nativity (N=199)		
Foreign-born	62	31%
U.S.-born	137	69%
First-generation ^a	20	10%

Notes: Subtotals may not sum to 100% due to rounding. ^aU.S.-born with at least one foreign-born parent.

Businesses

A diverse representation of businesses participated in this study (Figure 3). Almost one-third of businesses (30%) were retail, grocery, and convenience stores. One-fifth (22%) were restaurants or bars, one-fifth (21%) nonprofessional services like auto repair and plumbing, and the remaining businesses were in professional services, finance, and property management (15%), and health and fitness (11%). Three-quarters (74%) of surveyed businesses employed fewer than 10 people; one-quarter employed more than 10, and 1 in 10 said the respondent/owner was the only employee. The median number of employees among respondent businesses was four employees and the mean was 10.

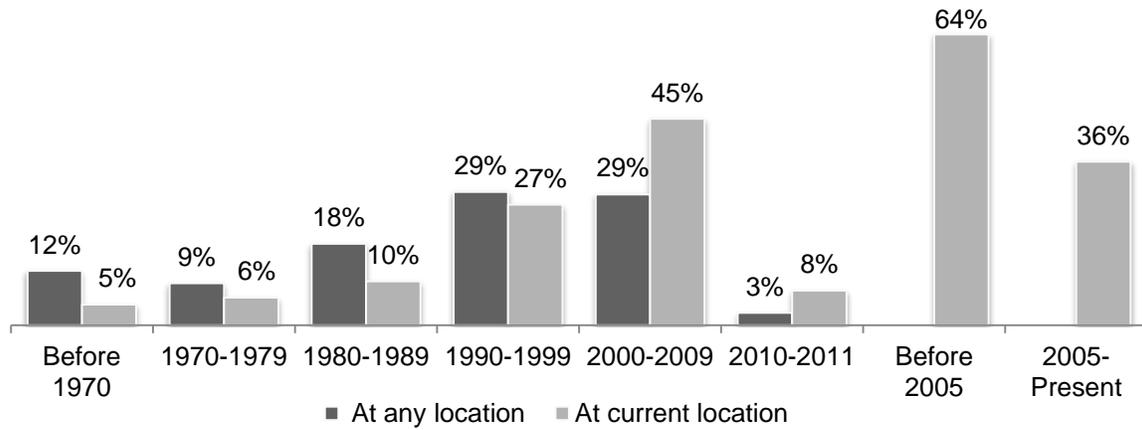
3. Business types and sizes (N=201)

Type (N=201)	Number	Percent
Retail, grocery, and convenience stores	61	30%
Restaurants, bars, hospitality, and recreation	44	22%
Nonprofessional services (e.g., auto, plumbing, etc.)	43	21%
Property management, professional services, and finance	31	15%
Health and fitness	22	11%
Number of employees (N=199)		
Owner only (no employees)	20	10%
1-9 employees	127	64%
10+ employees	52	26%

One-quarter (25%) of respondents reported owning the space in which the business operated and three-quarters (75%) rented the space.

The businesses surveyed were generally established businesses that have been in operation for several years (Figure 4). More than two-thirds (68%) have been in operation at any location since before 2000, and almost two-thirds of the businesses surveyed (64%) have been at their current location since before 2005. For the purposes of analysis, businesses are split into those that had been in their current location for at least five full years at the time of the 2011 construction (since before 2005) and those that had been in their current location for less than five years.

4. Length of time business has been in operation (at current location and at any location)



Construction-related impacts

Most respondents (80%) reported either minor or significant construction near their business in the year before the survey (Figure 5). About one-half of businesses reported reduced access to their sidewalk (53%), an extended closure of the street in front of their business (52%), and the loss of on-street parking (51%). One-quarter (27%) of businesses surveyed lost off-street parking. Two-thirds (68%) of businesses reported at least one of these disruptions near their business.

5. Level of construction and construction-related disruptions

Overall experience (N=201)	Number	Percent
There was no construction	41	21%
There was minor construction	33	17%
There was significant construction	126	63%
Types of disruptions (N=201) ^a		
Sidewalk in front of business had reduced access	107	53%
Business side of street was closed longer than a month	105	52%
Lost on-street parking	102	51%
Lost off-street parking	55	27%
One or more of the above disruptions	137	68%

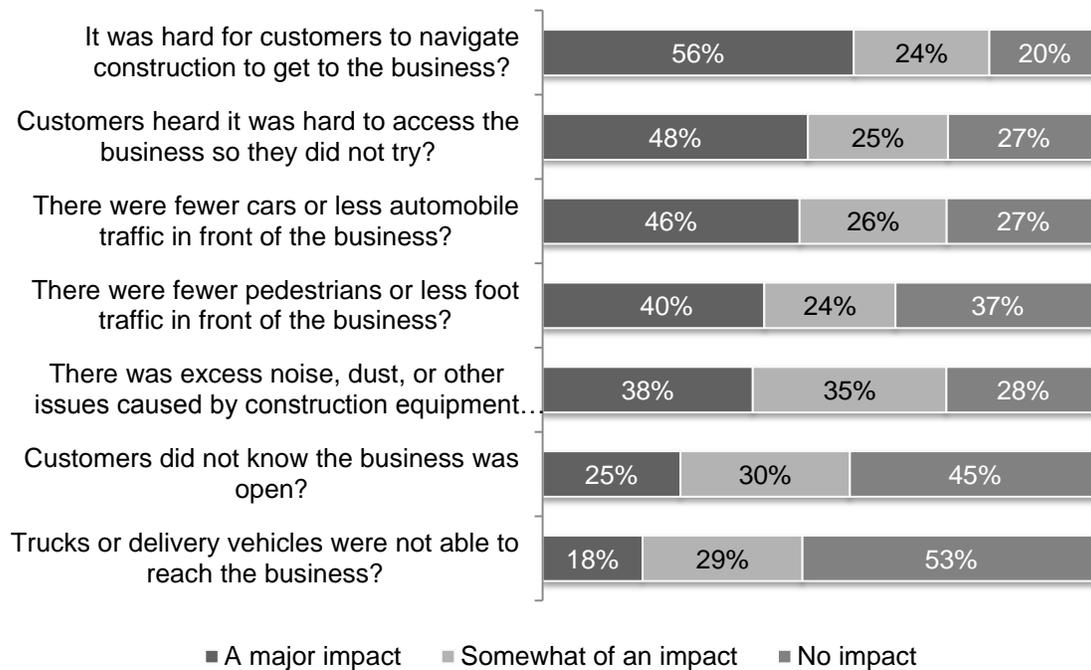
Note: ^a These disruptions are self-reported and therefore based on the perceptions of the respondent. No additional information was gathered on the nature of these disruptions, such as the location or number of on- or off-street parking spaces lost.

Through this report, the measure of any construction-related disruptions (one or more types) will be used to illustrate how service participation, strategy implementation, and outcomes differ between businesses that directly experienced construction and those that did not.

Most businesses (86%) reported at least one of the negative construction-related impacts listed in Figure 6, and 64 percent of respondents reported that at least one of the impacts was major (Figure A9). The primary negative impacts experienced by businesses were customer difficulty in accessing the business (80% reported any impact), reduced auto traffic in front of the business (73%), and perceived access challenges among customers (73%). About one-half of respondents reported each of these issues had a major impact on their business. Almost three-quarters (72%) reported that their business was impacted by construction noise and dust and almost two-thirds (63%) reported that reduced foot traffic in front of their business had an impact on their business.

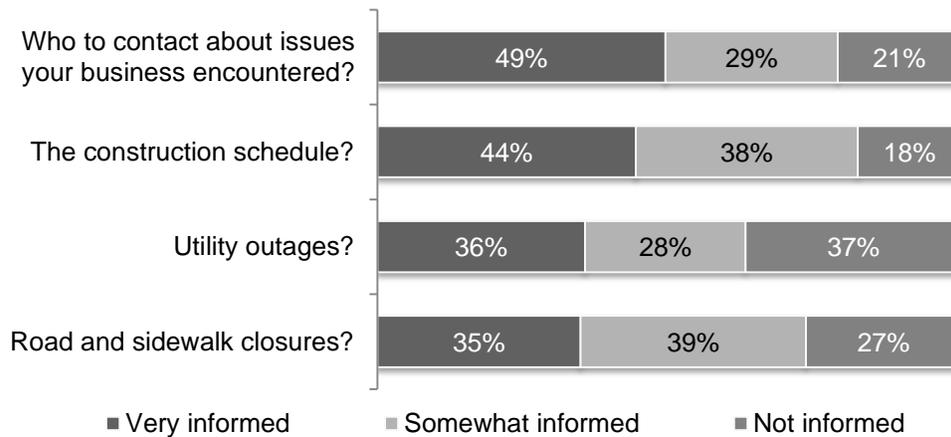
Of the businesses that reported no construction near their business, a few (11 businesses) reported at least one major impact of the construction on their business. The most commonly cited major impacts among these businesses were those that would be expected from businesses that experienced construction nearby but not directly in front of their business (“It was hard for Customers to navigate construction to get to the business” and “There were fewer cars or less automobile traffic in front of the business”).

6. How much was your business impacted because...



Respondents reported receiving varying levels of information about construction-related issues (Figure 7). Respondents reported they were most informed about the construction schedule and who to contact about issues the business encountered. One-half (49%) of respondents reported they were very informed about who to contact about issues their business encountered, and another 29 percent reported they were somewhat informed. Almost one-half (44%) of respondents reported they were very informed about the construction schedule, and another 38 percent reported they were somewhat informed. More than one-third reported that they were very informed about utility outages (36%) and road or sidewalk closures (35%).

7. How informed were you about...



Groups affected by construction

In general, white (non-Hispanic) respondents were more likely to report any type of construction-related disruption and impact, while respondents of color were more likely to report multiple types of disruptions and a major impact. In addition, larger businesses (10+ employees) reported more types of disruptions and impacts, while small (owner-only) businesses reported more major impacts of construction. Finally, businesses that rent their space and businesses that have been in their current location since before 2005 were also more likely to experience disruptions and at least one major impact of construction.

As noted previously, two-thirds (68%) of businesses reported at least one type construction-related disruption. Some groups of respondents were more likely than others to report these construction-related disruptions and corresponding impacts of construction on their business. The following groups were more likely than others to report at least one construction-related disruption (Figure A1 in the Appendix):

- Larger businesses (10+ employees) (81%)
- White (non-Hispanic) respondents (74%)
- Businesses that have been at their current location since before 2005 (72%)
- Businesses that rent their space (71%)
- U.S.-born respondents (71%)

More than one-quarter (26%) of respondents of color reported all four types of construction-related disruptions (listed in Figure 5). This compares to nine percent of white respondents.

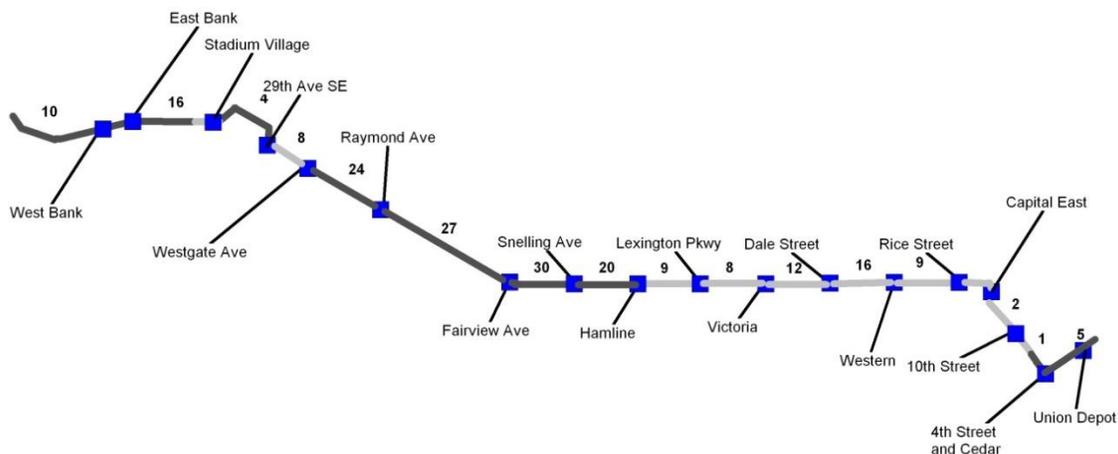
Respondents of color were also more likely than white respondents to report a loss of off-street parking (36% to 20%).

In answering questions about the impact of these (and other) construction-related disruptions on their business, respondents report similar patterns of more widespread impact on some groups but more focused and intense impact on others (see Figures A2-A9 in the Appendix). While 86 percent of respondents overall reported at least one of these impacts, rates were higher among white (non-Hispanic) respondents (90%), U.S.-born respondents (90%), nonprofessional services (91%), and larger (10+ employees) businesses (94%). On the other hand, while these groups only reported a median of 5 impacts, the median number of reported impacts was higher among respondents of color (6), foreign-born respondents (6), and retail, grocery, and convenience stores (7). These groups also report more major impacts than average (Figure A9 in the Appendix). In other words, construction-related disruptions and impacts were not evenly distributed, nor were their levels of intensity.

Geographic distribution of construction and businesses

Figure 8 shows a map of the Central Corridor Light Rail line with each station area from the Downtown Saint Paul Union Depot (eastern terminus) through the West Bank on the University of Minnesota campus (western most construction area). The darker areas are the segments that experienced construction during the 2011 construction season. The numbers between station areas represent the number of businesses surveyed in that segment. As shown on the map, 137 businesses surveyed (68%) were in segments that experienced construction in 2011, and another 19 businesses (9%) were in segments directly adjacent to segments experiencing construction.

8. Map of 2011 construction and distribution of surveyed businesses



External services

More than one-third (36%) of respondents reported participating in one or more of the construction mitigation services offered. These services include:

- ***Small Business Loan Program.*** Administered by the Neighborhood Development Center (NDC) in Saint Paul and the Minneapolis Consortium of Community Developers (MCCD) in Minneapolis, this program provides a modest safety net for businesses that show a loss in sales due to the construction of the Central Corridor Light Rail construction.
- ***Parking Loan Program.*** Administered by the City of Saint Paul, this program provides forgivable loans for improvements to off-street parking along University Avenue. The program is only available to businesses in Saint Paul.
- ***Services provided by the University Avenue Business Preparation Collaborative (U7).*** The U7 collaborative provides a wide range of services including marketing and business planning assistance, façade improvement, and technical assistance for technology and other business services.
- ***The “Buy Local” coupon book.*** Organized by the Midway Chamber of Commerce, the “Buy Local” coupon book was a component of the Chamber’s Discover Central Corridor initiative to market local businesses.
- ***Progressive Dinner.*** Organized by the Midway Chamber of Commerce, the progressive dinner took place in December 2011 and provided transportation to different restaurants on the corridor over the course of a single night.

In addition to the services described above, respondents were asked about their awareness and perceived effectiveness of the Metropolitan Council Central Corridor Project Office’s communications efforts to highlight local businesses in their weekly newsletter. However, these communications efforts are not a program or service in which the businesses would actively participate, so respondents were not asked if their business had participated.

Figure 9 shows the participation rates among the sampled businesses based on their relative eligibility. The participation rates shown are higher than corridor-wide rates because all known program participants at the time of sampling were included in the survey sample.

9. Participation in construction impact mitigation services (among all respondent businesses)

	Number potentially eligible	Number participating	Percent of eligible participating
Small Business Loan Program	201	42	21%
Parking Loan Program ^a	158	9	6%
U7 services ^b	201	22	11%
“Buy Local” coupon book	201	27	13%
Progressive Dinner (Dec 11) ^c	43	10	23%
Any of the above	201	72	36%

Notes: All businesses were assumed to be potentially eligible for the Small Business Loan Program, the U7 services, and the “Buy Local” coupon book, as data were unavailable to assess business eligibility based on program-specific criteria for these services. Similarly, while the potentially eligible population for the Parking Loan Program and the Progressive Dinner can be narrowed based on location and business type, some businesses listed as “potentially eligible” may be ineligible based on criteria for which data were unavailable for this study.

^a Only Saint Paul businesses were potentially eligible. ^b Respondent businesses participated in the following U7 services: technical support (8), printing of flyers, banners, etc. (7), advertising and marketing support (6), information sessions (6), business planning (3), and financial support (3). Because some participated in multiple services, individual service participation counts do not total the number of U7 services participants. ^c Only restaurants were potentially eligible to participate.

Among those businesses who were *not* program participants at the time of sampling, two-thirds (66%) were aware of the Small Business Loan Program, while about one-third (30%) were aware of the Parking Loan Program and the “Buy Local” coupon book (37%) (Figure 10). About two-fifths (42%) were aware of the Central Corridor Project Office’s communication efforts (the features of local businesses and events in the Project Office’s newsletter). Of the 21 restaurants that were not sampled for their participation in the Progressive Dinner or other programs, none were aware of the Progressive Dinner.

10. Awareness of services and communication efforts (among only the respondent businesses *not* sampled based on service participation, N=130)

	Number potentially eligible	Number aware	Percent aware
Small Business Loan Program	130	83	66%
Parking Loan Program ^a	107	32	30%
“Buy Local” coupon book	130	47	37%
Progressive Dinner (Dec 11) ^b	21	0	0%
Project Office communication efforts	130	55	42%

Note: This figure includes only the 130 randomly selected respondents (those not selected for their participation in any of the first four services listed above; see **Methods** for more information). Respondents were not asked about awareness of U7 services. ^a Only Saint Paul businesses were eligible. ^b Only restaurants were eligible.

Respondents who were aware of certain services but had not participated were asked why they had not participated. Perceived ineligibility was a primary reason why businesses had not participated in the Small Business Loan and Parking Loan Programs (Figure 11). About one-half (49%) of Small Business Loan Program nonparticipants reported that they were ineligible and almost two-thirds (64%) of Parking Loan nonparticipants reported they were ineligible. Ineligibility was less of a reason (19%) for nonparticipation in the “Buy Local” coupon book.

Nonparticipant businesses also reported that they did not need these particular types of services. This includes almost one-half (44%) of nonparticipants for the “Buy Local” coupon book, 27 percent of nonparticipant businesses for the Parking Loan Program, and one-fifth (19%) of nonparticipant businesses for Small Business Loan Program.

11. Primary reasons for nonparticipation in services

	Small Business Loan Program (N=77)	Parking Loan Program (N=33)	“Buy Local” coupon book (N=52)
Was not eligible ^a	49%	64%	19%
Did not need this type of assistance	19%	27%	44%
Did not have time to apply or found out too late	5%	0%	8%
Did not know how or where to apply	3%	3%	10%
There was no space left in the program	NA	0%	0%
Application process too much work	9%	0%	2%
Requirements of program were too restrictive	13%	0%	10%
Level of support did not match level of need	8%	3%	15%

Notes: This series of questions was asked only of respondents who were aware of each program but had not participated in the program. Percentages may sum to more than 100% as respondents were permitted to select more than one primary reason. When respondents stated that their ineligibility was a primary reason, they were not asked about any additional reasons. This question was not asked about the U7 services, the Progressive Dinner, or the Project Office communication efforts.

^a Respondents were not asked why they believed their business to be ineligible, and interviewers did not verify business' ineligibility based on program criteria.

Service participants

The proportion of businesses participating in at least one service varied little across groups, generally falling between 30 and 40 percent (Figure A12 in the Appendix). Only restaurants and bars (52%) and retail, grocery, and convenience stores (41%) were significantly more likely than other types of businesses (25%) to participate in at least one service. Larger businesses (40%) were also slightly more likely than smaller businesses (34%) to participate in services overall.

Different services, however, served somewhat distinct populations. The Small Business Loan Program and the U7 services generally served relatively high proportions of restaurants and bars, businesses with foreign-born respondents and respondents of color, and businesses that rent their space. The U7 services were also used much more by businesses with fewer than ten employees.

The “Buy Local” coupon book, the Progressive Dinner, and the Parking Loan Program, on the other hand, served relatively high proportions of businesses with U.S.-born and white respondents, businesses that have been at their current location since before 2005, businesses that own their space, and businesses with at least one employee. The “Buy

Local” coupon book had especially high participation rates among restaurants and bars and businesses with 10 or more employees.

Reasons for participation

Participants in the Small Business and Parking Loan Programs generally reported that a primary reason for their participation was that the programs met a specific need for the business (Figure 12). All Parking Loan Program participants and three-quarters (76%) of Small Business Loan Program participants reported this was a primary reason for participating. Most participants also reported that the favorable terms or requirements of the programs were primary reasons for participating. “Buy Local” coupon book participants were most likely to report that they participated primarily because they were asked to do so (52%), though about two-fifths said each of the other two factors were primary reasons for their participation.

12. Primary reasons for participation in services

	Small Business Loan Program (N=42)	Parking Loan Program (N=9)	“Buy Local” coupon book (N=27)
The [program] met a specific need for your business	76%	100%	38%
The terms or requirements of the [program] were favorable	62%	78%	42%
You were asked to participate in the [program]	43%	22%	52%

Note: Percentages may sum to more than 100% as respondents were permitted to select more than one primary reason. This question was not asked about the U7 services, the Progressive Dinner, or the Project Office communication efforts.

Service effectiveness

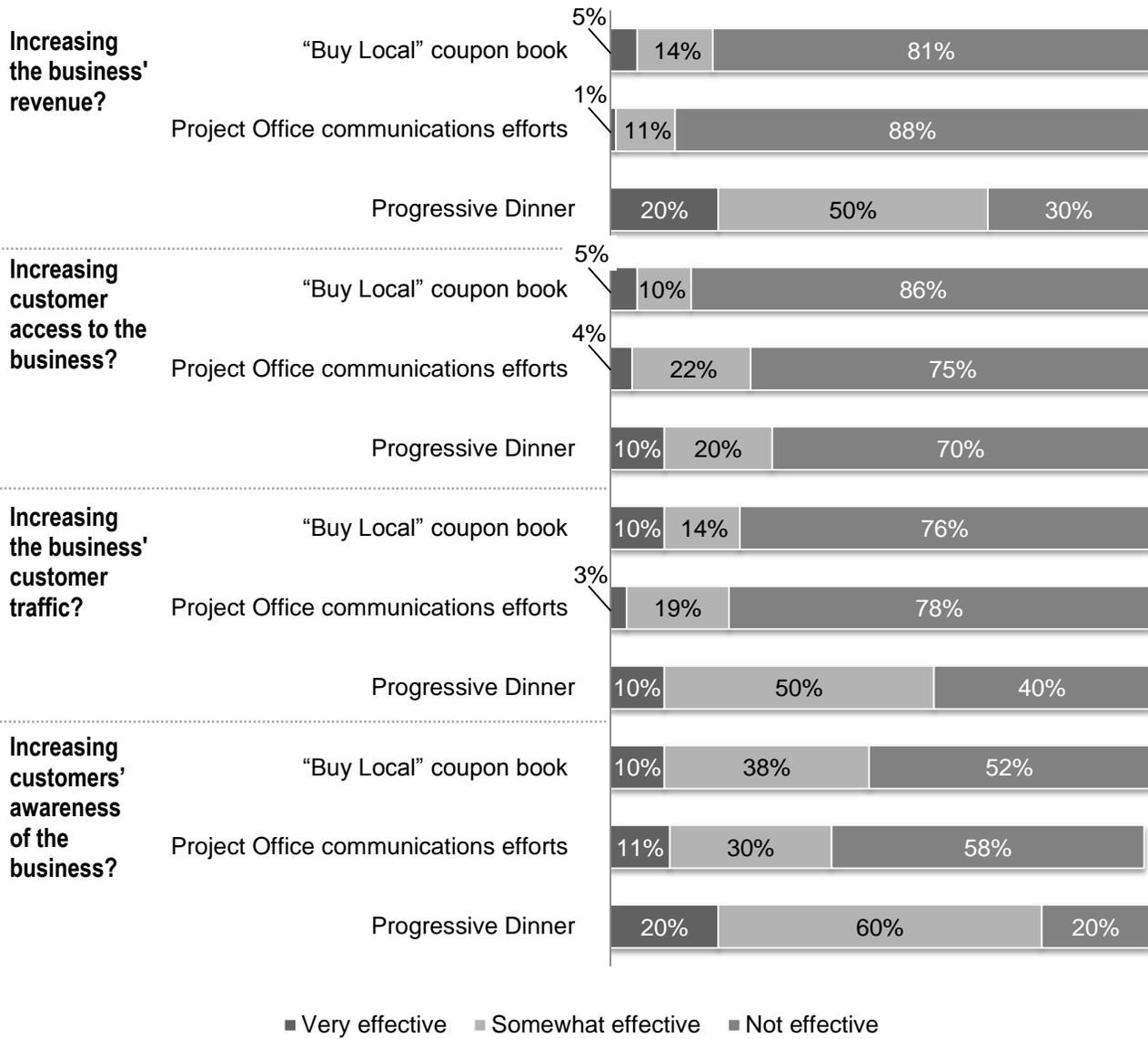
The services available to corridor businesses aim to serve two distinct but related purposes; while the Small Business Loan Program, the Parking Loan Program, and the U7 services generally aim to compensate for lost revenue due to construction, the “Buy Local” coupon book, Progressive Dinner, and Project Office communication efforts were designed to increase customer traffic, thereby generating additional revenue. As a result, we consider the effectiveness of these programs separately.

Programs intended to increase customer traffic

Of the service goals shown in Figure 13, respondents considered the “Buy Local” coupon book (48% somewhat or very effective) and Project Office communication efforts (41%) most effective in increasing customer awareness of the business. Fewer respondents reported that the “Buy Local” book was at least somewhat effective in increasing customer traffic (24%), customer access to the business (15%), and revenue (19%). Similarly, fewer respondents also reported that the Project Office communication efforts were at least somewhat effective in increasing customer traffic (22%), customer access to the business (26%), and revenue (12%).

Most of the respondents from the 10 restaurants that participated in the Progressive Dinner reported it was at least somewhat effective in increasing customer awareness of the business (80%), customer traffic (60%), and revenue (70%). However, only 30 percent reported the program was effective in increasing customer access to the business.

13. How effective was the program in...

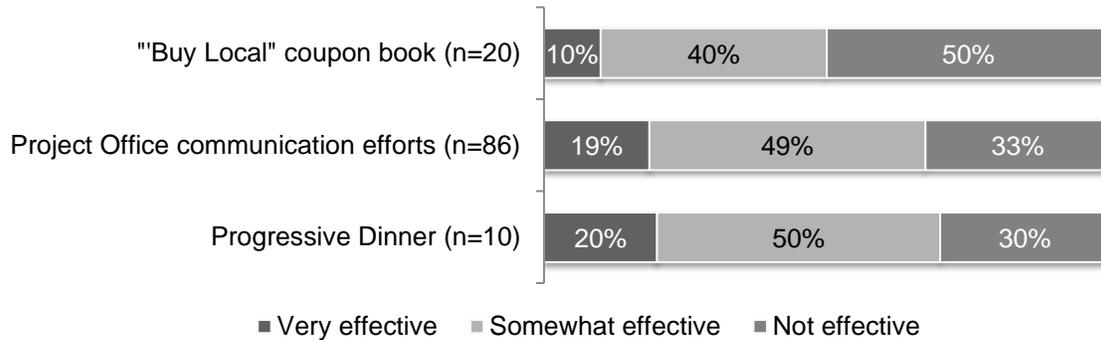


Notes: Progressive Dinner (n=10) and "Buy Local" coupon book (n=21) ratings are from program participants only. Project Office communication efforts ratings are from respondents who were aware of these efforts (n=80). This question was not asked about the U7 services, the Small Business Loan program, or the Parking Loan program.

Respondents rated the overall effectiveness of these programs much more favorably than the specific measures of effectiveness (Figure 14). The Progressive Dinner was rated especially high, with more than two-thirds (70%) describing this service as at least somewhat effective and 20 percent reporting the event was very effective. The overall effectiveness of the Project Office communication efforts was also rated particularly high

with two-thirds (67%) of respondents rating the communications as at least somewhat effective and 19 percent rating them very effective.

14. Overall, how would you rate the effectiveness of the program?

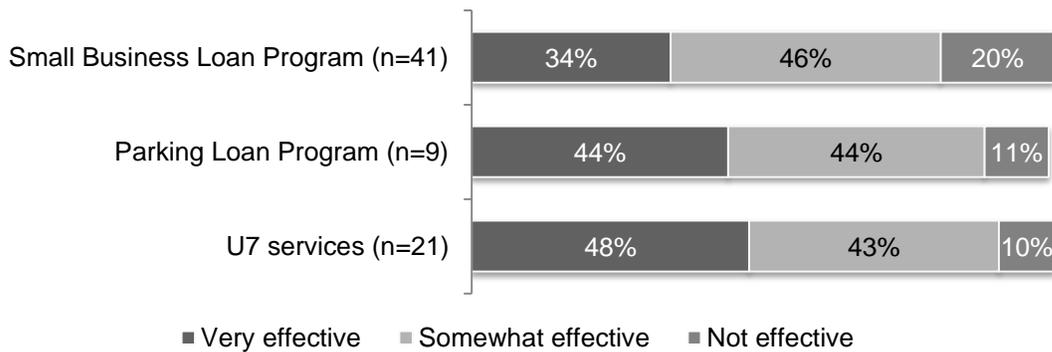


While the numbers of respondents who participated in the “Buy Local” coupon book and Progressive Dinner were too small to present disaggregated results by respondent and business categories, the overall average effectiveness ratings for the programs in Figure 14 tended to be highest among respondents of color and foreign-born respondents. Similarly, the disaggregated results for the Project Office communication efforts (shown in Figure A10 in the Appendix) show generally higher effectiveness ratings among respondents of color and foreign-born respondents.

Programs intended to compensate for revenue losses

The programs focused more on compensation for revenue losses were rated more positively overall than the programs that focus more on increasing customer traffic. Almost all respondents reported the U7 services (90%) and the Parking Loan Program (89%) were at least somewhat effective, and 80 percent rated the Small Business Loan Program as at least somewhat effective (Figure 15).

15. Overall, how would you rate the effectiveness of the program?



The sample sizes for the Parking Loan Program and the U7 services are insufficient to present disaggregated results by business and respondent type, but once again, the average overall effectiveness ratings across the services in Figure 15 tend to be highest among respondents of color and foreign-born respondents. Disaggregated results for the Small Business Loan Program are shown in Figure A11 in the Appendix. Consistent with the overall trend, the results show generally higher effectiveness ratings among respondents of color and foreign-born respondents. In addition, respondents from businesses that have been in their current location since 2005 or more recently also gave the program higher marks on average.

Strengths of the services

When asked what was the best thing about the programs, the responses varied by the type of service (Figure 16). The Small Business and Parking Loan Program participants most commonly noted the financial support as the best thing about those programs, with a few others noting the quality of service from the program or the ease of the application (Small Business Loan Program only). For the U7 services, respondents most frequently mentioned the service quality and the attention they received from the program. Many also mentioned the importance of the information about the available business assistance programs. Finally, among participants in the “Buy Local” coupon book and the Progressive Dinner, the most commonly noted best thing was that the programs generated business by getting greater customer exposure. A few of these participants also noted the financial gain from and low cost of the services.

16. What was the best thing about the [program]?

Open-ended responses, coded for themes	Small Business Loan Program (n=41)	Parking Loan Program (n=9)	U7 Services (n=19)	"Buy Local" Coupon Book (n=20)	Progressive Dinner (n=9)
Financial support (the money)	93% ^a	44%	5%	-	22%
No or low cost for services	2%	22%	11%	30%	11%
Generated new business (exposure to new customers, a couple of new accounts)	-	11%	-	45%	44%
Positive response by program (they reacted really quickly, anytime you called they got back to you right away, they cared)	2%	11%	47%	15%	-
Other (easy application process, information, the cards looked nice, they drove people to us, nice for the day)	7% ^b	22%	42% ^c	10%	22%
Nothing	-	11%	-	15%	-

Notes: Based on coded open-ended responses. Columns may not sum to 100% because respondents were permitted to list more than one item. ^a Includes 56% of respondents who specifically noted the low-risk nature of the support (forgivable or low-interest loans). ^b All 7% noted the ease of the application process. ^c This includes 26% who said that the best thing about the U7 services was the information they provided about assistance for businesses.

Those who were familiar with the Central Corridor Project Office's communication efforts were also asked about the best thing about those efforts. The most common features cited were the construction information and the consistency/regularity of receiving that information. Several others mentioned the support they received from Project Office staff.

Suggestions for improvement

Like participant responses regarding the strengths of the programs, participant suggestions for program improvement varied widely by program (Figure 17). In the case of the Small Business and Parking Loan Programs, respondents most commonly suggested that the programs disburse more funds, and many said they had no suggestions for program improvement. A few suggested, however, that the program broaden the eligibility criteria and improve the timeliness of service delivery.

Participants in the U7 services also suggested that the program improve the timeliness of service delivery, but nearly as many said they had no suggestions for program improvement. Several others said the program should have greater funding available.

Participants in the “Buy Local” coupon book and the Progressive Dinner, meanwhile, suggested that the programs could be improved by getting greater participation (of customers and businesses) in these programs.

Finally, those familiar with the Project Office’s communication efforts suggested that the information provided be more timely and accurate, that the Project Office conduct more outreach, and that they communicate with businesses in person rather than via phone, mail, or email. A few others suggested broadening the population targeted in these communication efforts to reach a larger audience.

17. How could the [program] be improved?

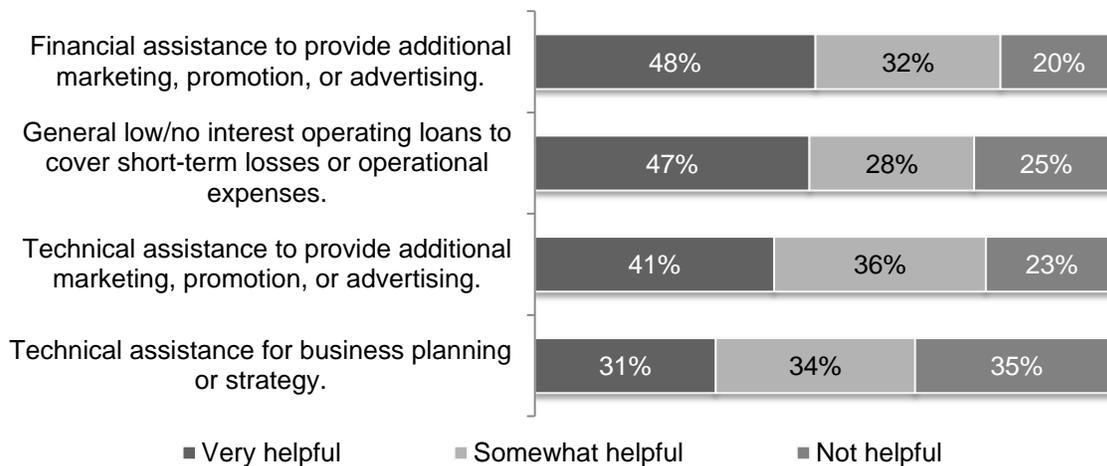
Open-ended responses, coded for themes	Small Business Loan Program (n=41)	Parking Loan Program (n=9)	U7 Services (n=19)	"Buy Local" Coupon Book (n=16)	Progressive Dinner (n=9)
Provide more funding	55%	33%	19%	-	-
Provide grants instead of a loan	5%	-	6%	-	-
Broaden eligibility criteria (how they figure out the %, more flexible in how they determine need, less paperwork)	23%	11%	-	-	-
Improve timeliness of service delivery	5%	22%	31%	6%	22%
Greater participation (event was poorly attended, poorly organized, go outside community, include more businesses or more customers)	-	-	-	38%	56%
Nothing - everything was great	13%	33%	25%	25%	11%
Other	11%	22%	38%	32%	11%

Notes: Columns may not sum to 100% because respondents were permitted to list more than one item.

Additional service needs

Most respondents reported that additional financial and technical assistance would be at least somewhat helpful (Figure 18). About three-quarters of respondents reported financial assistance for marketing (80%) and low- or no-interest operating loans (75%) would be helpful, and nearly one-half of respondents reported that these forms of financial assistance would be “very helpful.” Most respondents also said technical assistance would be helpful, both for marketing and promotion (77%) and business planning or strategy (65%).

18. Interest in services



When asked for their opinion of which services provide the best support to businesses affected by Central Corridor Light Rail construction, respondents most frequently mentioned financial support, including grants or loans (22%), compensation for losses (11%), support for marketing (10%), and other unspecified forms of financial support (22%). Others suggested providing more information to businesses (15%), providing more parking (10%), ensuring better customer access to businesses (9%) or giving customers more information about business access (8%).

Internal strategies

Respondents were also asked about specific strategies their businesses may have implemented on their own to help mitigate the negative effects of construction (Figure 19). Just over one-half (55%) of respondents reported that their business implemented at least one strategy to mitigate the effects of construction. These strategies included additional signage (32%), promotional offers (29%), advertising (18%), and other strategies (25%) like customer outreach via phone and social media, reduced rates or enhanced services (e.g., delivery or meeting in clients' homes rather than at the business site), and improvements to the business space to enhance the customers' experience. Among the businesses who invested in these mitigation strategies, the average amount spent was \$2,311 and the median was \$725. Businesses spent the most on advertising (\$1,993 on average) and promotional offers (\$2,115 on average).

19. Construction mitigation strategies

Business invested in...	N=	Percent	Median \$ spent	Mean \$ spent
Additional signage to help customers navigate the construction or to indicate the business was open	64 ^a	32%	\$350	\$661
Additional TV, radio, or print advertising to attract or retain customers because of construction	37 ^b	18%	\$1,000	\$1,993
Additional coupons, deals, or other promotional offers to attract or retain customers to the business because of construction	58 ^c	29%	\$500	\$2,115
Other activities intended to offset the effects of the rail construction	51	25%	NA	NA
One or more of the above	110 ^d	55%	\$725	\$2,311
Two or more of the above	64 ^e	32%	\$1,000	\$2,941

Notes: Median \$ spent does not include costs of "Other activities intended to offset the effects of the rail construction."^a Mean and median based on 57 of 58 responses provided by respondents for amount spent. One outlying value omitted. Six respondents did not report the amount invested in additional signage. ^b Mean and median based on 32 of 33 responses provided by respondents for amount spent. One outlying value omitted. Four respondents did not report the amount invested in additional advertising. ^c Mean and median based on 46 of 47 responses provided by respondents for amount spent. One outlying value omitted. Eleven respondents did not report the amount invested in promotional offers. ^d Mean and median based on 86 cases due to missing and omitted values as described above. ^e Mean and median based on 59 cases due to missing and omitted values as described above.

Businesses implementing mitigation strategies

Respondents of color and foreign-born respondents were slightly more likely than white respondents and U.S.-born respondents (respectively) to say their business implemented two or more of their own construction mitigation strategies (Figure 20). They were especially likely to use additional signage (40%) and promotional offers (34%) (Figure A13 in the Appendix).

20. Number of internal strategies implemented, by respondent demographics

	No strategies		1 strategy		2+ strategies	
	Number	Percent	Number	Percent	Number	Percent
Race						
Respondents of color	34	40%	20	24%	30	36%
White (non-Hispanic) respondents	52	49%	24	22%	31	29%
Nativity						
Foreign-born	25	41%	12	20%	24	39%
U.S.-born	61	45%	34	25%	40	30%

Businesses that are dependent on bringing in steady customers, like the retail and service industries, were more likely to invest in strategies to mitigate the negative effects of construction (Figure 21). Two-thirds (67%) of restaurants, bars, and other hospitality businesses implemented at least one strategy and more than one-half (53%) implemented multiple strategies. Sixty-one percent of retail stores (including grocery and convenience stores) and over one-half (56%) of nonprofessional service businesses (e.g., auto repair, plumbing) implemented at least one strategy.

21. Number of internal strategies implemented, by type of business

Type	No strategies		1 strategy		2+ strategies	
	Number	Percent	Number	Percent	Number	Percent
Retail, grocery, and convenience stores	23	38%	20	33%	17	28%
Restaurants, bars, hospitality, recreation	14	33%	6	14%	23	53%
Health and fitness	12	57%	7	33%	2	10%
Property management, professional services, and finance	20	65%	6	19%	5	16%
Nonprofessional services	19	44%	7	16%	17	40%

Businesses that rent their space were more likely than those that own their space to apply multiple strategies, while those that own their space were more likely to apply only one strategy (Figure 22). Businesses that rent their space were especially likely to use advertising (22%) and promotional offers (34%), compared to average implementation rates of 18 percent and 29 percent, respectively (Figure A13 in the Appendix). Larger businesses (10+ employees) were also more likely to use promotional offers (35%). Businesses that have been in their current location since 2005 or later were more likely to implement multiple strategies while more established businesses (in their current location since 2004 or earlier) were more likely to use a single strategy (Figure 22).

22. Number of strategies implemented by business characteristics

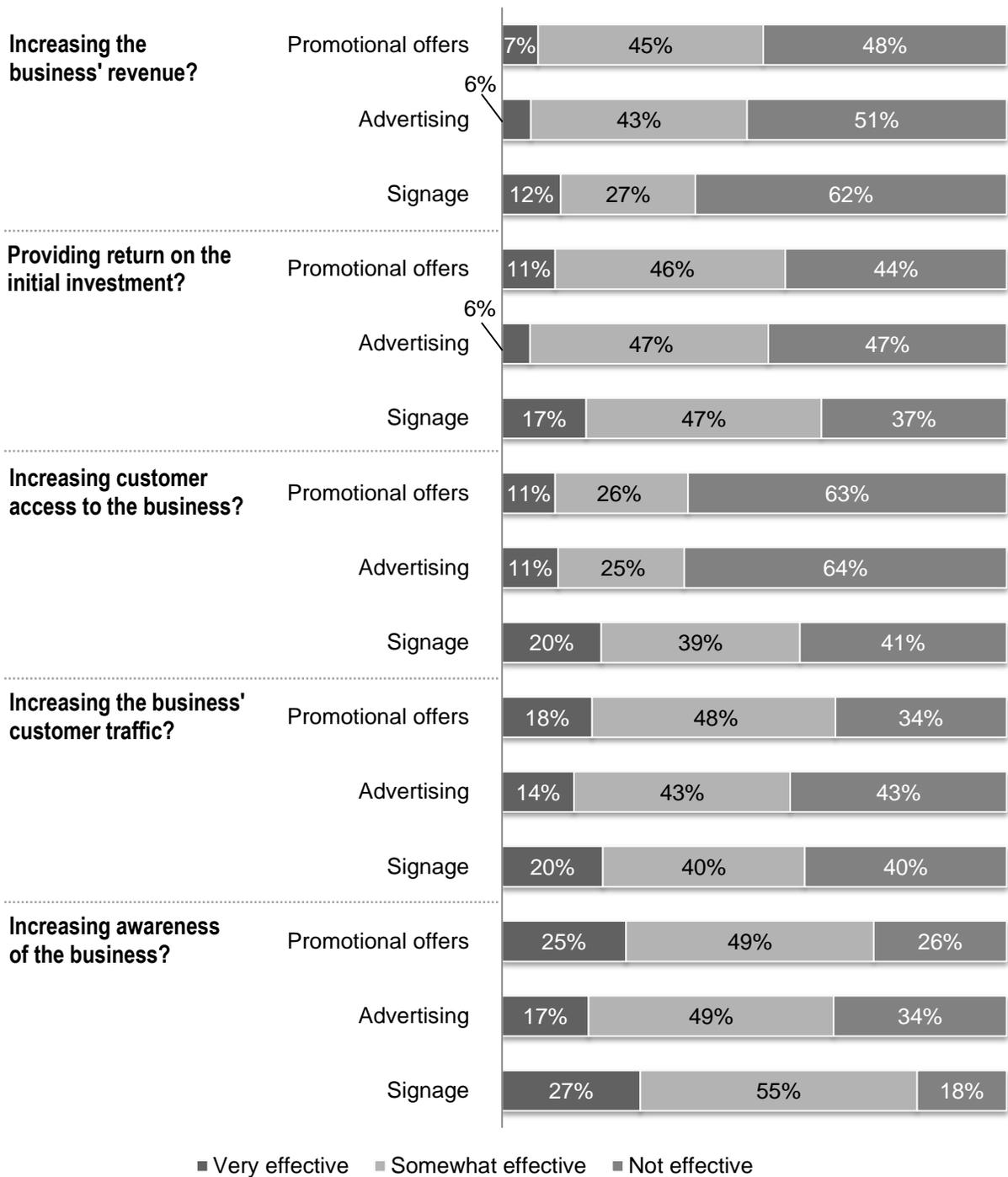
	No strategies		1 strategy		2+ strategies	
	Number	Percent	Number	Percent	Number	Percent
Number of employees						
Owner only (No employees)	9	45%	4	20%	7	35%
1-9 Employees	52	42%	33	26%	40	32%
10+ Employees	26	50%	9	17%	17	33%
Time at current location						
Since before 2005	55	44%	35	28%	35	28%
Since 2005 or later	30	44%	11	16%	27	40%
Property						
Own	21	42%	20	40%	9	18%
Rent	67	45%	26	18%	55	37%

Effectiveness of mitigation strategies

Respondents reported that the strategies were most effective in achieving intermediate goals like increasing customer awareness of the business and increasing the business' customer traffic, but were seen as less effective in the end goals of increasing revenue and providing a return on the initial investment in the strategy (Figure 23).

Most respondents (82%) reported that additional signage was effective in increasing awareness of the business and three-fifths reported that it was effective in increasing customer traffic (60%) and access (59%) to the business. Three-fifths (63%) also reported that the signage provided a return on the initial investment and two-fifths (38%) said the additional signage was effective in increasing revenue. On the other hand, about half of respondents reported that their additional advertising (49%) and promotional offers (52%) were effective in increasing revenue, and more than one-half reported these expenditures were at least somewhat effective in providing a return on their initial investment.

23. How effective was the [strategy] in...



Notes: Promotional offers: n=57. Advertising: n=36. Signage: n=62.

Business perceptions of future outlook

Three-quarters (76%) of the businesses surveyed reported that they expect their business to be operating in its current location in five years, 16 percent did not expect their business to be in operation at this location in five years, and 9 percent did not know if their business would be in operation at their current location in five years.

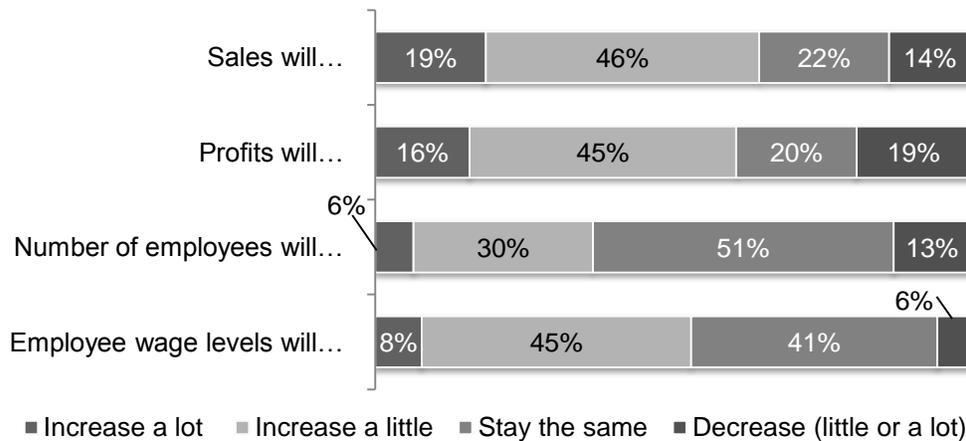
Larger businesses (85%) and businesses that own their space (82%) were more likely than average to expect their business to continue operating in its current location (Figure A14 in the Appendix). In addition, respondents of color (84%) and foreign-born respondents (85%) were more likely than white (69%) and U.S.-born respondents (71%) to say their business would be in its current location in five years. Restaurants and bars (84%) and health and fitness establishments (81%) were also more optimistic than other types of businesses about their future in their current location. Businesses that have been in their current location since before 2005 were no more likely to expect to continue operating in their current location than those who have been there for less time.

The 16 percent of businesses (n=32) who said they did not expect to be operating at their current location in five years reported the following reasons:

- An uncertain future (19 respondents)
- Severe financial losses (9)
- The business does not want to stay in the area (8)
- A pending or future building eviction - e.g., demolition, sale, new lease (4)

When asked about their expectations about future sales, profits, employee wages, and number of employees, most respondents expected at least small increases in sales (64%), profits (61%), and employee wages (53%). One-half of respondents (51%) expected the number of employees at their business to stay the same over the next five years (Figure 24). Relatively low proportions of respondents expected any decreases in sales (14%), profits (19%), number of employees (13%), or employee wages (6%).

24. Over the next five years, do you expect...



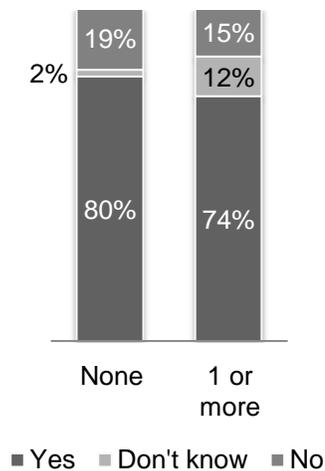
Figures A15-A18 in the Appendix show how these expectations vary by respondent group. For example, businesses with 10 or more employees were more likely than average to expect increases in sales (81% versus 64%), profits (79% versus 61%), number of employees (55% versus 37%), and employee wage levels (73% versus 53%). Owner-only businesses, however, were also more likely than average to expect increases in sales (71%). Businesses that have been in their current location since six years or less expressed greater-than-average optimism about their future sales (73%), profits (71%), and number of employees (49%). Restaurants and bars were more likely than average to expect increases in sales (71%) and number of employees (58%).

Construction impact and future outlook

The impact of construction on Central Corridor businesses is unclear. While businesses that experienced none of the construction-related disruptions listed (see Figure 5) were slightly more likely than those who experienced one or more disruptions to report that their business would be around in five years (Figure 25), they were also *less* likely to report that sales, profits, and employee wage levels would increase in that time (Figure 26). Businesses experiencing none of these construction disruptions were more likely to report they would still be operating in their current location in five years and less likely to say they did not know, compared to businesses that experienced construction-related disruptions.

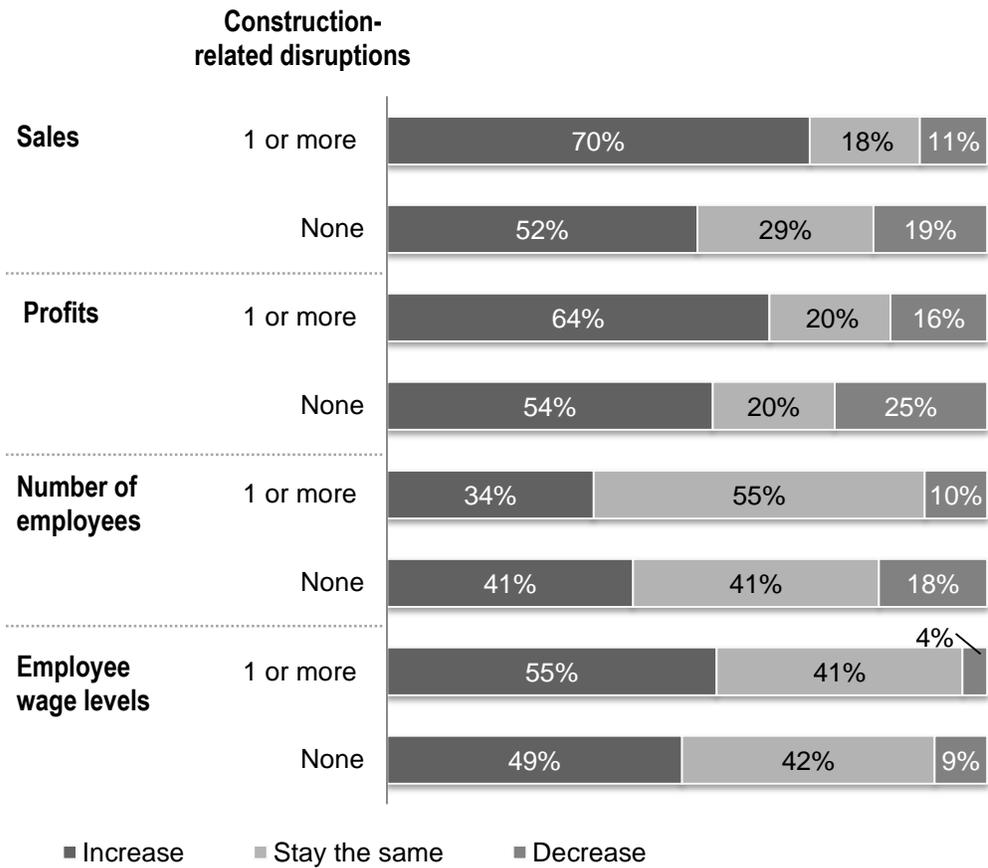
25. Do you expect this business will be operating in its current location in FIVE YEARS?

Construction related disruptions



However, those experiencing at least one type of construction-related disruption were slightly more likely than those who reported no disruptions to expect increases in sales, profits, number of employees, and employee wage levels over the next five years (Figure 26).

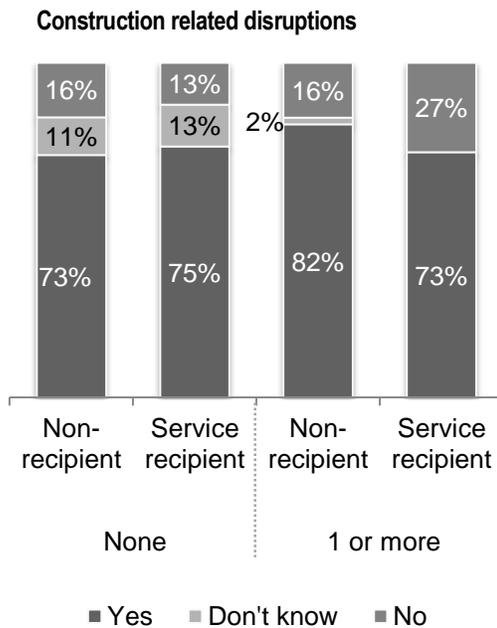
26. Over the next five years, do you expect...



Service use and future outlook

Figure 27 illustrates the relationship between the participation in services and future outlook while accounting for construction-related disruptions experienced by the businesses. Among those who experienced no construction disruptions, those who received services were *less* likely than non-recipients (73% versus 82%) to say they would be operating in their current location in five years. Among those who experienced at least one type of construction-related disruption, service recipients and non-recipients were similarly likely (75% versus 73%) to expect their business to be operating in its current location in five years.

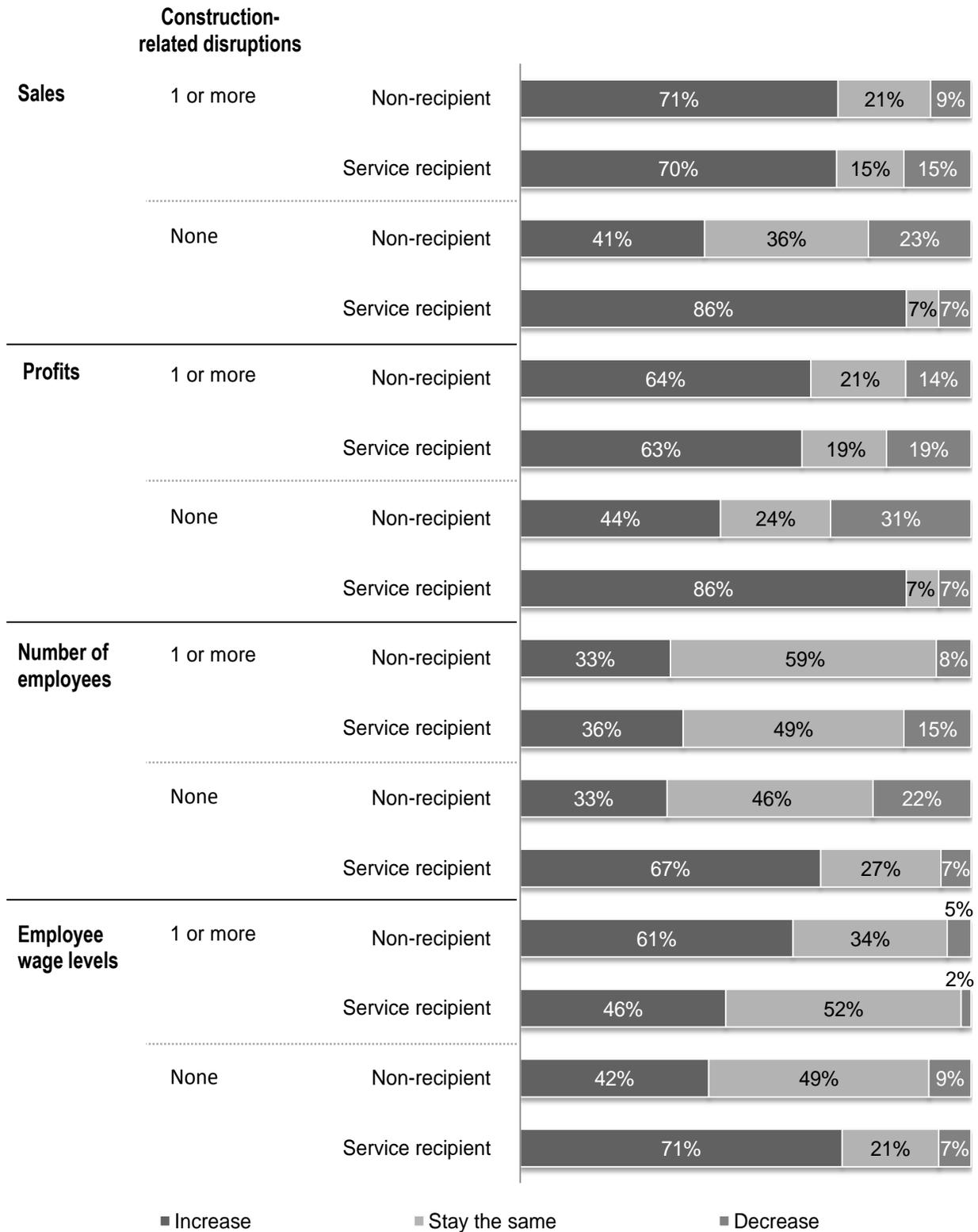
27. Do you expect this business will be operating in its current location in FIVE YEARS?



Among businesses that reported construction-related disruptions, service recipients were not noticeably different from non-recipients in their expectations for future sales, profits, or number of employees. However, service recipients were less likely than non-recipients to expect an increase in employee wages in the next five years (Figure 28).

Among businesses not directly affected by construction-related disruptions, service recipients were significantly more likely to expect increases in sales, profits, number of employees, and employee wage levels.

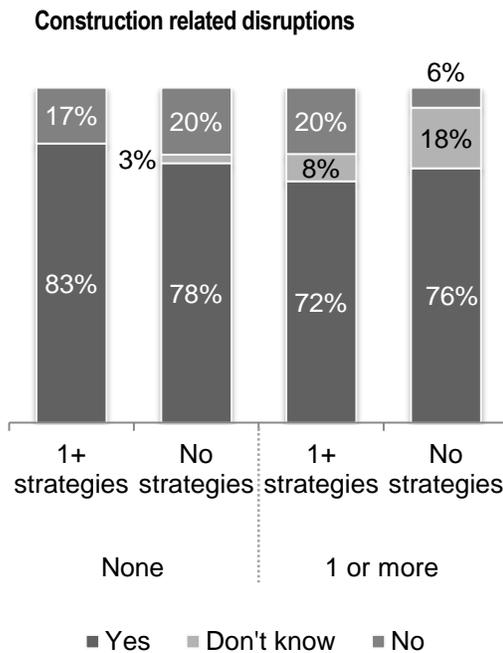
28. Over the next five years, do you expect...



Business strategies and future outlook

Businesses that experienced no construction-related disruptions and implemented at least one internal mitigation strategy were slightly more likely than those who had not implemented strategies (83% versus 78%) to expect their business to remain at its current location for the next five years (Figure 29). However, for the businesses experiencing at least one type of construction-related disruption, those implementing construction mitigation strategies like advertising, signage, and promotional offers appear slightly less likely (72% versus 76%) to expect to continue operating in their current location for the next five years.

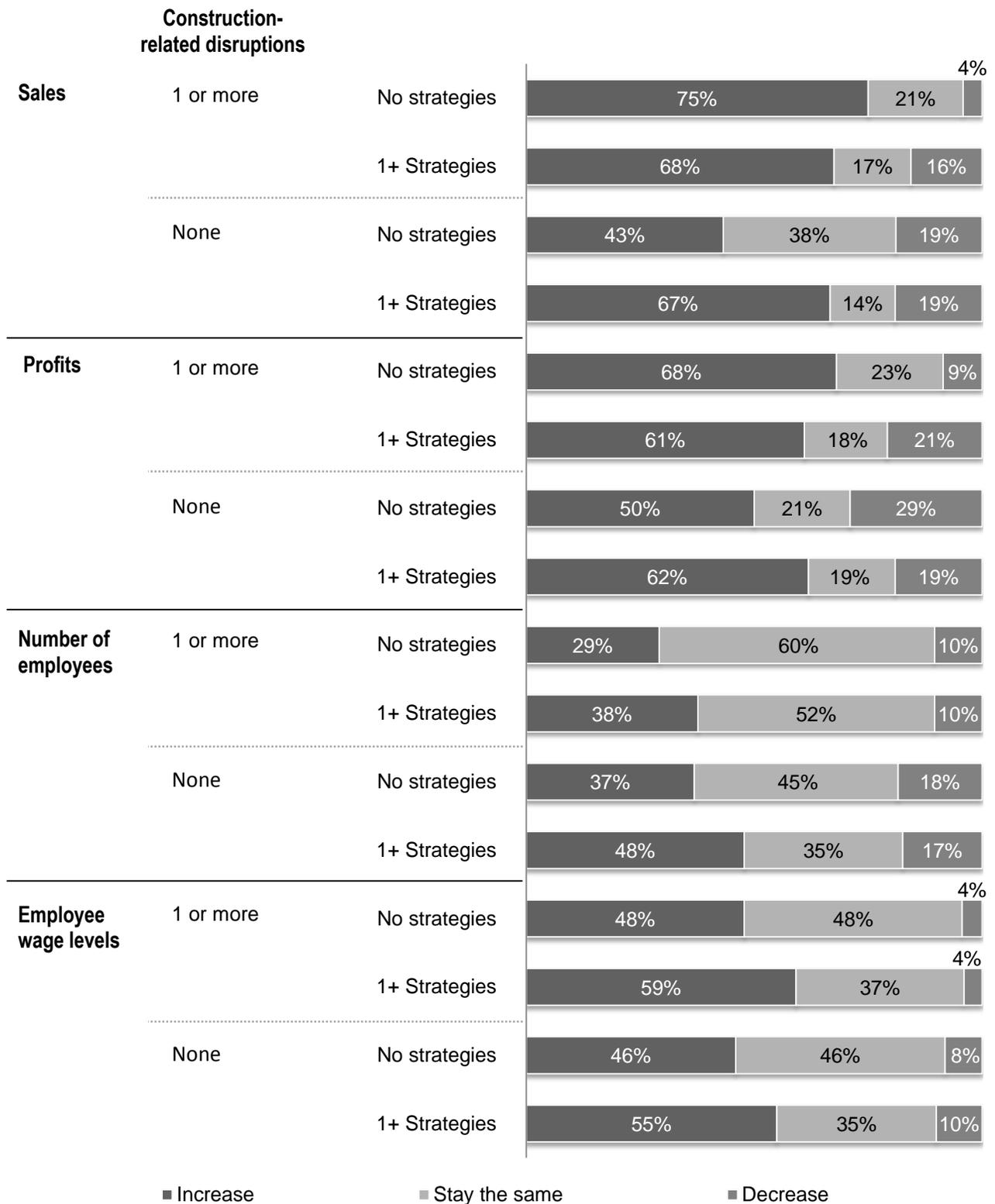
29. Do you expect this business will be operating in its current location in FIVE YEARS?



Among businesses that reported no construction-related disruptions, businesses that implemented mitigation strategies were more optimistic than average about future changes in sales, profits, number of employees, and employee wage levels (Figure 30).

The pattern among those that experienced one or more construction-related disruptions, however, was not as consistent. While the businesses applying mitigation strategies were slightly less likely than average to expect increases in sales and profits over the next five years, they were more likely than average to expect increases in the number and wages of their employees.

30. Over the next five years, do you expect...



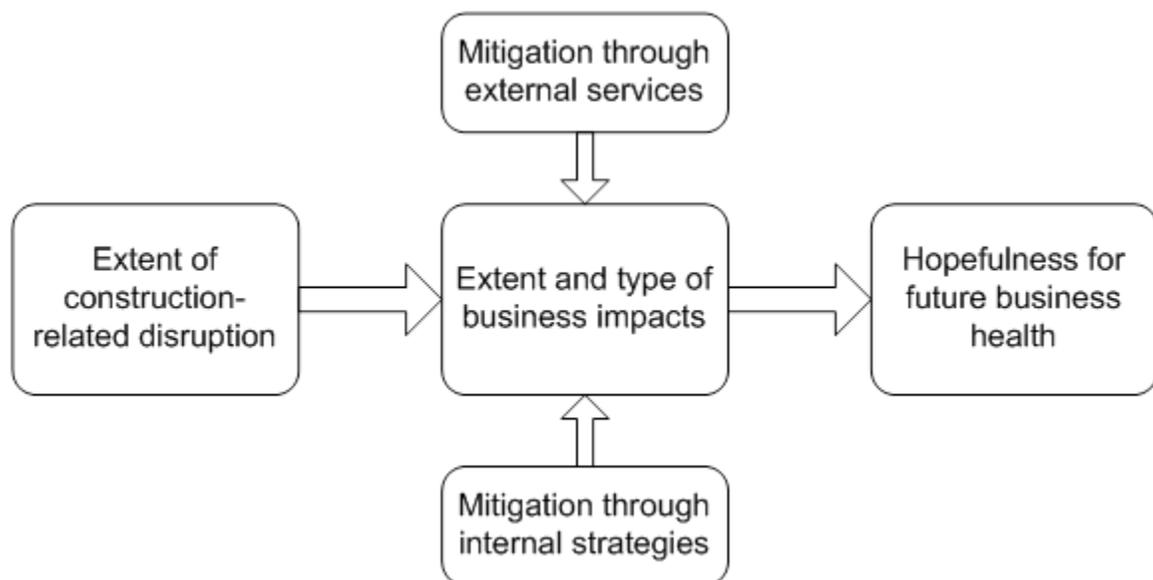
Issues to consider

Despite the anticipated future benefits for businesses located along the Central Corridor Light Rail line, construction of the line has potential negative impacts on the short-term success and viability of nearby businesses. Many local organizations have put forth a great deal of effort to help Central Corridor businesses survive during construction and thrive in the post-construction environment, and many businesses have invested in their own strategies to maintain and build their customer base. These services and strategies can help to reduce the negative impact of construction and improve the future prospects of corridor businesses.

Theory of construction mitigation

A simplified theory of construction mitigation is shown in Figure 31. Businesses experience construction-related disruptions (road or sidewalk closures, loss of on- or off-street parking), which may have impacts like reduced customer awareness of or access to the business, leading to declines in business revenue. Businesses may use several kinds of services to both compensate for declines in revenue or augment customer traffic to generate additional revenue. In addition, businesses may implement their own mitigation strategies, including signage, advertising, or promotional offers, to grow their customer base. These factors interact in varying and complex ways to form a respondent's view of the business' future; to analyze any piece individually without due attention to these interactions can only yield an incomplete version of the story.

31. Theory of construction mitigation



Successful implementation of services

Many of the findings listed in this report are encouraging. In particular, respondents report strong satisfaction and general effectiveness of the services as well as well-designed programs.

General effectiveness and satisfaction

In general, service recipients rated the services favorably, with the majority of respondents describing each service as at least somewhat effective overall in mitigating the effects of construction. In fact, overall effectiveness ratings frequently exceeded ratings on specific effectiveness measures (e.g. increasing customer traffic or business revenue), indicating that respondents saw some important overarching quality in these services despite perceiving most of them to be only minimally effective in their specific goals. The services thus appear to be effectively accomplishing something, if only primarily the generation of good will among recipients. This was especially true of the Project Office communication efforts, which at a minimal cost, received relatively high ratings of overall effectiveness.

Well-designed programs

In addition, results suggest that these services are designed fairly well to encourage participation and be user-friendly. Reasons for nonparticipation were generally attributed to ineligibility or a lack of need for the program, and very few respondents attributed their nonparticipation to perceived negative program attributes (e.g. the program's challenging application process, overly restrictive requirements, or inadequate support relative to their level of need). Furthermore, participants in the loan programs said that they participated at least in part because the programs met specific needs of the participant businesses and had favorable terms or requirements. In other words, feedback from both participants and nonparticipants indicates that the services were designed relatively well to meet business needs and encourage participation.

Challenges and opportunities

Still, findings reveal a few challenges and potential areas for improvement.

Specific effectiveness unclear

The ratings of service and strategy effectiveness on specific outcomes were relatively low, particularly the measures related to increasing revenue and providing a return on the initial investment. Respondents described both services and strategies as more effective

in increasing customer traffic, but tended to describe both as relatively ineffective in the end goal of generating business revenue.

Outreach is critical to participation

Results indicate that participant outreach is crucial and can potentially be improved. The importance of program outreach is illustrated by the fact that a sizeable minority of loan program participants, along with the majority of “Buy Local” coupon book participants, said they participated primarily because they were invited to participate. Program awareness was fairly low, however, among the businesses that were not sampled for their program participation. Only the Small Business Loan Program was known to more than half of the randomly sampled respondents, while less than one-third of randomly sampled Saint Paul businesses were aware of the Parking Loan Program and none of the randomly sampled restaurants were aware of the Progressive Dinner.

Conclusion

Many factors prevent affect business health besides the services and strategies measured in this study, which prevent drawing a conclusive determination of the services’ and strategies’ impact on businesses. Construction-affected businesses had very similar levels of optimism about their future in the Central Corridor, regardless of their receipt of services or implementation of mitigation strategies. However, it is likely the construction-impacted businesses that seek services and apply construction mitigation strategies are disproportionately those that experience more disruptive construction or face more non-construction related difficult circumstances. These businesses are also less likely to be optimistic about their business’ future. As a result, the fact that these businesses display comparable optimism in the survey about the future when compared to other businesses could be interpreted to indicate a moderate level of effectiveness of these services and strategies among businesses impacted by construction. Without measures of businesses’ optimism prior to requesting services, we are unable to make any conclusive statements about the impact of strategies and services on future outlook.

However, there is evidence that services effectively reach those that need them the most, and provide a diverse range of options to meet a variety of needs. The groups that experienced the most intense construction impact (more disruptions, more impacts, or more “major” impacts) – foreign-born respondents, respondents of color, businesses that rent their space, restaurants and bars, and retail (including grocery and convenience) stores – disproportionately received the most highly rated services (the Small Business Loan Program and the U7 services).

In addition, the distribution of participation rates among respondent groups and services is an indication that groups of businesses were able to choose services that most closely met their needs. The diversity of programs allowed smaller, minority-owned, renting businesses to take advantage of revenue replacement programs that offer grants and forgivable loans, while larger, more established businesses could benefit from services that increase customer awareness or traffic, thereby generating additional revenue. This range of service options is critical to the programs' success, both individually and as a package of services to benefit the corridor, and helps to efficiently allocate scarce support resources.

This study only focuses on the first year of light rail construction. Examination of services and impacts related to construction during subsequent years of construction, and into operational service of the Central Corridor Light Rail line, will increase understanding of the total effect of construction and mitigation efforts.

Appendix

Figures

A1. Construction disruptions

	The business side of the street was closed for more than one month.	The sidewalk in front of your business had reduced access because of fencing, narrowed width, or other obstacles.	Your business lost on-street parking.	Your business lost off-street parking.	One or more of these experiences	N
Race						
Respondents of color	49%	49%	50%	36%	60%	86
White (non-Hispanic) respondents	56%	56%	52%	20%	74%	108
Nativity						
Foreign-born	52%	48%	50%	39%	63%	62
U.S.-born	53%	55%	52%	23%	71%	137
Type						
Retail, grocery, and convenience stores	56%	51%	49%	38%	70%	61
Restaurants, bars, hospitality, recreation	48%	52%	50%	30%	70%	44
Health and fitness	41%	59%	55%	14%	68%	22
Property management, professional services, and finance	65%	55%	55%	13%	71%	31
Nonprofessional services	49%	53%	49%	28%	60%	43
Number of employees						
Owner only (No employees)	50%	55%	60%	30%	70%	20
1-9 Employees	54%	50%	48%	23%	63%	127
10+ Employees	50%	62%	54%	37%	81%	52
Time at current location						
Since before 2005	56%	56%	53%	30%	72%	126
Since 2005 or later	47%	50%	47%	21%	63%	70
Property						
Own	50%	44%	42%	24%	60%	50
Rent	53%	56%	53%	28%	71%	148
Total	53%	52%	51%	27%	68%	201

A2. How much was your business impacted because... Customers did not know the business was open?

	No impact	Somewhat of an impact	A major impact	N
Race				
Respondents of color	36%	30%	35%	84
White (non-Hispanic) respondents	51%	31%	17%	103
Nativity				
Foreign-born	32%	27%	42%	60
U.S.-born	50%	33%	17%	132
Type				
Retail, grocery, and convenience stores	29%	34%	36%	58
Restaurants, bars, hospitality, recreation	38%	40%	21%	42
Health and fitness	77%	14%	9%	22
Property management, professional services, and finance	60%	23%	17%	30
Nonprofessional services	45%	29%	26%	42
Number of employees				
Owner only (No employees)	56%	28%	17%	18
1-9 Employees	42%	28%	30%	124
10+ Employees	48%	38%	14%	50
Time at current location				
Since before 2005	42%	33%	26%	120
Since 2005 or later	49%	28%	23%	69
Property				
Own	42%	40%	19%	48
Rent	46%	27%	27%	143
Total	45%	30%	25%	194

A3. How much was your business impacted because... It was hard for customers to navigate construction to get to the business?

	No impact	Somewhat of an impact	A major impact	N
Race				
Respondents of color	22%	19%	59%	83
White (non-Hispanic) respondents	19%	28%	53%	107
Nativity				
Foreign-born	23%	15%	62%	60
U.S.-born	18%	28%	54%	135
Type				
Retail, grocery, and convenience stores	17%	22%	61%	59
Restaurants, bars, hospitality, recreation	14%	30%	57%	44
Health and fitness	18%	32%	50%	22
Property management, professional services, and finance	32%	19%	48%	31
Nonprofessional services	22%	22%	56%	41
Number of employees				
Owner only (No employees)	26%	11%	63%	19
1-9 Employees	20%	23%	57%	125
10+ Employees	18%	31%	51%	51
Time at current location				
Since before 2005	20%	21%	59%	123
Since 2005 or later	17%	30%	52%	69
Property				
Own	21%	33%	46%	48
Rent	20%	21%	59%	146
Total	20%	24%	56%	197

A4. How much was your business impacted because... Customers heard it was hard to access the business so they did not try?

	No impact	Somewhat of an impact	A major impact	N
Race				
Respondents of color	24%	26%	50%	82
White (non-Hispanic) respondents	31%	23%	46%	98
Nativity				
Foreign-born	24%	24%	52%	58
U.S.-born	28%	25%	46%	127
Type				
Retail, grocery, and convenience stores	22%	26%	52%	58
Restaurants, bars, hospitality, recreation	20%	25%	55%	40
Health and fitness	48%	24%	29%	21
Property management, professional services, and finance	43%	25%	32%	28
Nonprofessional services	20%	25%	55%	40
Number of employees				
Owner only (No employees)	13%	50%	38%	16
1-9 Employees	29%	21%	50%	119
10+ Employees	30%	24%	46%	50
Time at current location				
Since before 2005	26%	19%	55%	118
Since 2005 or later	28%	38%	34%	64
Property				
Own	27%	33%	40%	48
Rent	27%	21%	51%	136
Total	27%	25%	48%	187

A5. How much was your business impacted because... Trucks or delivery vehicles were not able to reach the business?

	No impact	Somewhat of an impact	A major impact	N
Race				
Respondents of color	48%	22%	30%	82
White (non-Hispanic) respondents	58%	34%	8%	106
Nativity				
Foreign-born	47%	26%	28%	58
U.S.-born	56%	30%	14%	135
Type				
Retail, grocery, and convenience stores	41%	31%	29%	59
Restaurants, bars, hospitality, recreation	45%	38%	17%	42
Health and fitness	67%	29%	5%	21
Property management, professional services, and finance	71%	19%	10%	31
Nonprofessional services	60%	24%	17%	42
Number of employees				
Owner only (No employees)	67%	17%	17%	18
1-9 Employees	53%	27%	20%	123
10+ Employees	50%	37%	13%	52
Time at current location				
Since before 2005	48%	30%	22%	124
Since 2005 or later	61%	29%	11%	66
Property				
Own	41%	37%	22%	49
Rent	57%	26%	17%	143
Total	53%	29%	18%	195

A6. How much was your business impacted because... There were fewer pedestrians or less foot traffic in front of the business?

	No impact	Somewhat of an impact	A major impact	N
Race				
Respondents of color	32%	26%	43%	82
White (non-Hispanic) respondents	42%	22%	36%	102
Nativity				
Foreign-born	34%	19%	47%	58
U.S.-born	37%	25%	37%	131
Type				
Retail, grocery, and convenience stores	29%	17%	53%	58
Restaurants, bars, hospitality, recreation	26%	36%	38%	42
Health and fitness	57%	14%	29%	21
Property management, professional services, and finance	55%	17%	28%	29
Nonprofessional services	34%	29%	37%	41
Number of employees				
Owner only (No employees)	47%	6%	47%	17
1-9 Employees	39%	20%	41%	122
10+ Employees	30%	34%	36%	50
Time at current location				
Since before 2005	33%	24%	44%	119
Since 2005 or later	43%	22%	34%	67
Property				
Own	31%	33%	35%	48
Rent	39%	19%	42%	140
Total	37%	24%	40%	191

A7. How much was your business impacted because... There were fewer cars or less automobile traffic in front of the business?

	No impact	Somewhat of an impact	A major impact	N
Race				
Respondents of color	27%	28%	44%	81
White (non-Hispanic) respondents	30%	25%	46%	105
Nativity				
Foreign-born	32%	21%	47%	57
U.S.-born	26%	28%	46%	134
Type				
Retail, grocery, and convenience stores	21%	24%	55%	58
Restaurants, bars, hospitality, recreation	24%	21%	55%	42
Health and fitness	29%	38%	33%	21
Property management, professional services, and finance	48%	19%	32%	31
Nonprofessional services	24%	34%	41%	41
Number of employees				
Owner only (No employees)	29%	12%	59%	17
1-9 Employees	28%	27%	46%	123
10+ Employees	27%	29%	43%	51
Time at current location				
Since before 2005	27%	21%	51%	121
Since 2005 or later	27%	34%	39%	67
Property				
Own	24%	31%	45%	49
Rent	29%	24%	47%	141
Total	27%	26%	46%	193

A8. How much was your business impacted because... There was excess noise, dust, or other issues caused by construction equipment or crews?

	No impact	Somewhat of an impact	A major impact	N
Race				
Respondents of color	29%	32%	39%	82
White (non-Hispanic) respondents	27%	36%	36%	107
Nativity				
Foreign-born	29%	28%	43%	58
U.S.-born	26%	38%	36%	136
Type				
Retail, grocery, and convenience stores	25%	37%	37%	59
Restaurants, bars, hospitality, recreation	21%	36%	43%	42
Health and fitness	27%	45%	27%	22
Property management, professional services, and finance	45%	16%	39%	31
Nonprofessional services	24%	38%	38%	42
Number of employees				
Owner only (No employees)	26%	21%	53%	19
1-9 Employees	32%	34%	34%	123
10+ Employees	17%	42%	40%	52
Time at current location				
Since before 2005	22%	33%	45%	124
Since 2005 or later	36%	40%	24%	67
Property				
Own	27%	29%	45%	49
Rent	27%	38%	35%	144
Total	28%	35%	38%	196

A9. Construction impacts

	1 or more of these impacts		# impacts	1 or more of these impacts was major		# major impacts
	Number	Percent	Median	Number	Percent	Median
Race						
Respondents of color	69	80%	6.0	55	64%	3.0
White (non-Hispanic) respondents	97	90%	5.0	68	63%	2.0
Nativity						
Foreign-born	48	77%	6.0	38	61%	3.0
U.S.-born	123	90%	5.0	90	66%	2.0
Type						
Retail, grocery, and convenience stores	53	87%	7.0	40	66%	4.0
Restaurants, bars, hospitality, recreation	38	86%	5.5	31	70%	3.0
Health and fitness	19	86%	4.0	13	59%	1.0
Property management, professional services, and finance	24	77%	4.0	17	55%	1.0
Nonprofessional services	39	91%	5.0	28	65%	2.0
Number of employees						
Owner only (No employees)	18	90%	4.0	14	70%	2.0
1-9 Employees	104	82%	5.0	81	64%	2.0
10+ Employees	49	94%	5.0	33	63%	2.0
Time at current location						
Since before 2005	110	87%	6.0	84	67%	3.0
Since 2005 or later	60	86%	5.0	43	61%	1.0
Property						
Own	43	86%	6.0	29	58%	1.5
Rent	127	86%	5.0	98	66%	2.0
Total	173	86%	5.0	129	64%	2.0

Notes: Individual construction impacts are shown in Figures A2-A9, and include:

- Customers did not know the business was open
- It was hard for Customers to navigate construction to get to the business
- Customers heard it was hard to access the business so they did not try

- Trucks or delivery vehicles were not able to reach the business
- There were fewer pedestrians or less foot traffic in front of the business
- There were fewer cars or less automobile traffic in front of the business
- There was excess noise, dust, or other issues caused by construction equipment or crews

A10. Overall, how would you rate the effectiveness of the Project Office communication efforts? Would you say...

	Very effective		Somewhat effective		Not effective	
	Number	Percent	Number	Percent	Number	Percent
Race						
Respondents of color	7	22%	18	56%	7	22%
White (non-Hispanic) respondents	8	16%	21	43%	20	41%
Nativity						
Foreign-born	5	21%	15	63%	4	17%
U.S.-born	10	17%	26	43%	24	40%
Number of employees						
Owner only (No employees)	2	25%	4	50%	2	25%
1-9 Employees	9	20%	19	41%	18	39%
10+ Employees	5	17%	17	57%	8	27%
Time at current location						
Since before 2005	11	18%	27	45%	22	37%
Since 2005 or later	5	21%	13	54%	6	25%
Property						
Own	5	17%	19	63%	6	20%
Rent	11	20%	22	40%	22	40%

A11. Overall, how would you rate the effectiveness of the Small Business Loan Program? Would you say...

	Very effective		Somewhat effective		Not effective	
	Number	Percent	Number	Percent	Number	Percent
Race						
Respondents of color	8	42%	10	53%	1	5%
White (non-Hispanic) respondents	5	25%	8	40%	7	35%
Nativity						
Foreign-born	7	41%	9	53%	1	6%
U.S.-born	7	29%	10	42%	7	29%
Number of employees						
Owner only (No employees)	2	40%	3	60%	0	0%
1-9 Employees	6	24%	13	52%	6	24%
10+ Employees	6	55%	3	27%	2	18%
Time at current location						
Since before 2005	8	31%	10	38%	8	31%
Since 2005 or later	5	36%	9	64%	0	0%
Property						
Own	1	14%	6	86%	0	0%
Rent	13	38%	13	38%	8	24%

A12. Service participation rates

	Small Business Loan Program		Parking Loan Program		U7 Services		"Buy Local" Coupon Book		Progressive Dinner		1+ Services received	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Race												
Respondents of color	19	23%	3	4%	16	20%	5	6%	3	15%	30	35%
White (non-Hispanic) respondents	21	20%	5	6%	6	6%	20	19%	7	30%	38	35%
Nativity												
Foreign-born	17	28%	3	6%	9	16%	2	3%	3	19%	21	34%
U.S.-born	25	19%	6	6%	13	10%	25	19%	7	26%	51	37%
Type												
Retail, grocery, and convenience stores	14	24%	3	6%	9	16%	7	12%	NA	NA	25	41%
Restaurants, bars, hospitality, recreation	17	40%	2	8%	5	13%	10	24%	10	24%	23	52%
Health and fitness	2	9%	2	11%	0	0%	2	9%	NA	NA	6	27%
Property management, professional services, finance	2	7%	1	4%	3	10%	3	10%	NA	NA	7	23%
Nonprofessional services	7	16%	1	3%	5	12%	5	12%	NA	NA	11	26%
Number of employees												
Owner only (No employees)	5	25%	0	0%	4	21%	0	0%	0	0%	7	35%
1-9 Employees	25	20%	7	7%	17	14%	13	10%	5	23%	43	34%
10+ Employees	12	24%	1	3%	1	2%	14	27%	5	24%	21	40%
Time at current location												
Since before 2005	27	22%	9	9%	12	10%	17	14%	8	36%	46	37%
Since 2005 or later	14	20%	0	0%	10	16%	10	14%	2	11%	25	36%
Property												
Own	7	15%	7	17%	4	9%	7	14%	2	29%	18	36%
Rent	35	24%	1	1%	18	13%	20	14%	8	23%	53	36%
Total	42	22%	9	6%	22	12%	27	14%	10	23%	72	36%

A13. During the first year of Light Rail construction, did your business...

	Purchase and display any additional signage to help customers navigate the construction or to indicate the business was open?		Purchase any additional TV, radio, or print advertising to attract or retain customers because of construction?		Run any additional coupons, deals, or other promotional offers to attract or retain customers to the business because of construction?		Do any other activities intended to offset the effects of the Central Corridor Light Rail construction?	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Race								
Respondents of color	34	40%	16	19%	29	34%	18	22%
White (non-Hispanic) respondents	27	25%	20	19%	26	24%	31	29%
Nativity								
Foreign-born	24	39%	10	16%	21	34%	14	24%
U.S.-born	40	29%	27	20%	37	27%	37	27%
Type								
Retail, grocery, and convenience stores	23	38%	13	21%	17	28%	14	23%
Restaurants, bars, hospitality, recreation	21	48%	9	20%	21	48%	15	36%
Health and fitness	3	14%	3	14%	2	9%	3	14%
Property management, professional services, and finance	4	13%	3	10%	4	13%	6	20%
Nonprofessional services	13	30%	9	21%	14	33%	13	30%
Number of employees								
Owner only (No employees)	5	26%	6	30%	4	20%	7	35%
1-9 Employees	44	35%	23	18%	36	28%	32	26%
10+ Employees	15	29%	8	15%	18	35%	12	23%
Time at current location								
Since before 2005	36	29%	23	18%	34	27%	34	27%
Since 2005 or later	27	39%	13	19%	22	31%	16	24%
Property								
Own	17	34%	5	10%	7	14%	10	20%
Rent	47	32%	32	22%	51	34%	41	28%
Total	64	32%	37	18%	58	29%	51	25%

A14. Do you expect this business will be operating in its current location in FIVE YEARS?

	Yes	No	Don't know	N
Race				
Respondents of color	84%	7%	9%	85
White (non-Hispanic) respondents	69%	24%	7%	108
Nativity				
Foreign-born	85%	5%	10%	61
U.S.-born	71%	21%	8%	137
Type				
Retail, grocery, and convenience stores	72%	16%	11%	61
Restaurants, bars, hospitality, recreation	84%	7%	9%	44
Health and fitness	81%	14%	5%	21
Property management, professional services, and finance	74%	19%	6%	31
Nonprofessional services	70%	23%	7%	43
Number of employees				
Owner only (No employees)	65%	20%	15%	20
1-9 Employees	73%	19%	8%	127
10+ Employees	85%	8%	8%	52
Time at current location				
Since before 2005	74%	18%	8%	125
Since 2005 or later	77%	14%	9%	70
Property				
Own	82%	12%	6%	50
Rent	73%	18%	9%	148
Total	76%	16%	9%	200

A15. Over the next FIVE YEARS, do you expect sales will...

	Decrease		Stay the same		Increase	
	Number	Percent	Number	Percent	Number	Percent
Race						
Respondents of color	12	16%	16	21%	49	64%
White (non-Hispanic) respondents	13	13%	22	22%	64	65%
Nativity						
Foreign-born	10	18%	10	18%	35	64%
U.S.-born	15	12%	29	23%	82	65%
Type						
Retail, grocery, and convenience stores	8	14%	11	19%	38	67%
Restaurants, bars, hospitality, recreation	5	13%	6	16%	27	71%
Health and fitness	1	5%	7	33%	13	62%
Property management, professional services, and finance	4	14%	7	24%	18	62%
Nonprofessional services	7	18%	9	24%	22	58%
Number of employees						
Owner only (No employees)	1	6%	4	24%	12	71%
1-9 Employees	23	19%	28	24%	67	57%
10+ Employees	1	2%	8	17%	38	81%
Time at current location						
Since before 2005	21	18%	26	23%	68	59%
Since 2005 or later	4	6%	13	20%	47	73%
Property						
Own	9	20%	7	16%	29	64%
Rent	16	12%	33	24%	87	64%
Total	25	14%	40	22%	118	64%

A16. Over the next FIVE YEARS, do you expect profits will...

	Decrease		Stay the same		Increase	
	Number	Percent	Number	Percent	Number	Percent
Race						
Respondents of color	15	19%	16	21%	46	60%
White (non-Hispanic) respondents	20	20%	18	18%	61	62%
Nativity						
Foreign-born	12	22%	13	24%	30	55%
U.S.-born	23	18%	23	18%	80	63%
Type						
Retail, grocery, and convenience stores	10	18%	10	18%	36	64%
Restaurants, bars, hospitality, recreation	8	21%	6	15%	25	64%
Health and fitness	3	14%	6	29%	12	57%
Property management, professional services, and finance	6	21%	6	21%	17	59%
Nonprofessional services	8	21%	9	24%	21	55%
Number of employees						
Owner only (No employees)	1	6%	5	31%	10	63%
1-9 Employees	32	27%	24	20%	63	53%
10+ Employees	2	4%	8	17%	37	79%
Time at current location						
Since before 2005	28	24%	25	22%	63	54%
Since 2005 or later	7	11%	11	17%	45	71%
Property						
Own	10	22%	7	16%	28	62%
Rent	25	18%	30	22%	81	60%
Total	35	19%	37	20%	111	61%

A17. Over the next FIVE YEARS, do you expect number of employees will...

	Decrease		Stay the same		Increase	
	Number	Percent	Number	Percent	Number	Percent
Race						
Respondents of color	12	16%	31	40%	34	44%
White (non-Hispanic) respondents	12	12%	57	56%	33	32%
Nativity						
Foreign-born	9	16%	26	46%	21	38%
U.S.-born	15	12%	66	52%	47	37%
Type						
Retail, grocery, and convenience stores	6	11%	35	61%	16	28%
Restaurants, bars, hospitality, recreation	4	11%	12	32%	22	58%
Health and fitness	2	10%	16	76%	3	14%
Property management, professional services, and finance	6	19%	14	45%	11	35%
Nonprofessional services	6	15%	17	44%	16	41%
Number of employees						
Owner only (No employees)	-	-	13	72%	5	28%
1-9 Employees	20	17%	62	53%	36	31%
10+ Employees	4	8%	18	37%	27	55%
Time at current location						
Since before 2005	20	17%	62	53%	35	30%
Since 2005 or later	4	6%	29	45%	32	49%
Property						
Own	6	13%	24	52%	16	35%
Rent	18	13%	69	50%	51	37%
Total	24	13%	94	51%	68	37%

A18. Over the next FIVE YEARS, do you expect employee wage levels will...

	Decrease		Stay the same		Increase	
	Number	Percent	Number	Percent	Number	Percent
Race						
Respondents of color	6	8%	29	39%	39	53%
White (non-Hispanic) respondents	4	4%	40	41%	54	55%
Nativity						
Foreign-born	4	7%	22	40%	29	53%
U.S.-born	6	5%	50	41%	66	54%
Type						
Retail, grocery, and convenience stores	3	5%	26	47%	26	47%
Restaurants, bars, hospitality, recreation	1	3%	16	42%	21	55%
Health and fitness	-	-	10	50%	10	50%
Property management, professional services, and finance	2	7%	10	33%	18	60%
Nonprofessional services	4	11%	12	33%	20	56%
Number of employees						
Owner only (No employees)	1	6%	6	38%	9	56%
1-9 Employees	9	8%	54	47%	51	45%
10+ Employees	-	-	13	27%	35	73%
Time at current location						
Since before 2005	7	6%	49	43%	59	51%
Since 2005 or later	3	5%	23	38%	34	57%
Property						
Own	2	4%	17	37%	27	59%
Rent	8	6%	57	43%	67	51%
Total	10	6%	74	41%	95	53%

Survey instrument

Central Corridor Business Survey

Hello, my name is (NAME) from Wilder Research. We are working with the Central Corridor Funders Collaborative and their Business Resources Collaborative on a study to learn about the experiences and needs of businesses during the Central Corridor Light Rail construction. I would like to speak with the owner of this business, or the manager of this location, to complete a brief survey about this business's activities related to the 2011 Light Rail construction season.

This survey is voluntary. Individual answers to questions will not be shared, and your business's participation in the survey will remain confidential. You are also free to skip any questions on the survey you do not wish to answer.

Information about the study:

This study is intended to learn more about the services and other strategies that businesses have used to help offset the effects of the Light Rail construction. We are speaking with 200 businesses along the Central Corridor, and are specifically asking about construction-related activities during the 2011 construction season (March through November). The information from this study will be used to better assist businesses and prepare for future construction. The study is funded by the Central Corridor Funders Collaborative and is sponsored by their Business Resource Collaborative working group. If you have any question about the study feel free to contact Brian Pittman at Wilder Research (brian.pittman@wilder.org)

Information about the CCFC:

The Central Corridor Funders Collaborative is a group of local and national funders who works with local resident organizations, community groups, nonprofit and business coalitions, and public agencies to create and implement corridor-wide strategies aimed at ensuring the adjoining neighborhoods, residents and businesses broadly share in the benefits of public and private investment in the Central Corridor Light Rail Line.

The Funders Collaborative, through its Catalyst Fund, expects to invest \$20 million over 10 years. Envisioned as a ten-year initiative, the Funders Collaborative supplements the programs and investment of the individual member foundations.

For more information: <http://www.funderscollaborative.org/>

Information about the BRC:

The Business Resources Collaborative (BRC) was created in 2008 to support businesses and property owners through the changing market of the Central Corridor. The BRC is a partnership of business coalitions, nonprofit community developers and local and regional governments. The goal of the BRC is to coordinate the delivery of a comprehensive, integrated mix of services that will support area businesses and property owners before, during, and after LRT construction.

For more information: <http://www.funderscollaborative.org/partners/business-development-group>

Central Corridor Business Survey

SECTION I: Introduction and background

First, I would like to ask a few questions about this business.

1a. Briefly, how would you describe your business? (PROBE: One sentence you use to explain the business.)

1b. Who is your primary customer base?

1c. What is your primary product or service?

2a. Are you the full owner, part owner, manager, or some other position?

- Manager 1
- Owner (sole) 2
- Co-owner, or partner 3
- OTHER (SPECIFY: _____) 4
- Refused 7
- Don't know 8

3a. Since what year has this business been in operation at any location? _____

- Refused -7
- Don't know -8

3b. Since what year has this business been operating at this location? _____

- Refused -7
- Don't know -8

[NOTE: IF Q3a or Q3b = 2012 TERMINATE INTERVIEW]

SECTION II: Effects of Central Corridor Light Rail construction

Next, we would like to ask you about construction-related disruption last year. Last year's construction includes any construction that occurred between March and November, 2011.

4a. Overall, how would you rate the level of construction near your business last year? Would you say...

- There was no construction, (GO TO Q5) 1
- There was minor construction, or 2
- There was significant construction? 3
- Refused 7

4b. We are interested in the ways in which construction disrupted your business last year. (March – November 2011)
Please answer **yes** or **no** for each of the following items.

	Yes	No	REF	DK
1. The business side of the street was closed for more than one month.	1	2	7	8
2. The sidewalk in front of your business had reduced access because of fencing, narrowed width, or other obstacles.	1	2	7	8
3. Your business lost on-street parking	1	2	7	8
4. Your business lost off-street parking	1	2	7	8

4c. We are interested in the effectiveness of construction-related communications during last year's construction. For each item, please tell me how informed you were about various aspects of last year's construction.

How informed were you about...	Would you say you were ...				
	Very informed,	Somewhat informed, or	Not informed?	REF	DK
1. The construction schedule	1	2	3	7	8
2. Road and sidewalk closures	1	2	3	7	8
3. Utility outages	1	2	3	7	8
4. Who to contact about issues your business encountered	1	2	3	7	8

5. I am going to read a list of possible construction-related impacts that might have affected businesses along the Central Corridor. For each item, please tell me if it had a **major impact**, **somewhat of an impact**, or had **no impact** on **YOUR business** last year (March-November 2011). **How much was your business impacted because...**

(How about . . .)	Would you say there was . . .				
	No impact,	Somewhat of an impact, or	A major impact?	REF	DK
1. Customers did not know the business was open	1	2	3	7	8
2. It was hard for Customers to navigate construction to get to the business	1	2	3	7	8
3. Customers heard it was hard to access the business so they did not try	1	2	3	7	8
4. Trucks or delivery vehicles were not able to reach the business	1	2	3	7	8
5. There were fewer pedestrians or less foot traffic in front of the business	1	2	3	7	8
6. There were fewer cars or less automobile traffic in front of the business	1	2	3	7	8
7. There was excess noise, dust, or other issues caused by construction equipment or crews	1	2	3	7	8

SECTION III: Services and assistance

We would like to ask you about some of the services, assistance, or programs you may have received or participated in during the first year of construction. The first year of construction was between March 2011 and November 2011.

Q6 =====

6. During the first year of construction, were you aware of and did you receive loan funds from the **Small Business Loan Program** administered by the **Neighborhood Development Center** (Saint Paul) and the **Minneapolis Consortium of Community Developers** (Minneapolis). [IF NEEDED: Forgivable loans to provide a modest safety net for businesses that show a loss in sales due to the construction of the Central Corridor Light Rail Transit Line.] Would you say you were...

- Not aware of these funds, (GO TO Q7) 1
- Aware of, but did not apply, (GO TO Q6a)..... 2
- Applied, but did not receive, or (GO TO Q6b)..... 3
- Received these funds? (GO TO Q6d)..... 4
- [VOLUNTEERD: application is being processed] (GO TO Q7) 5
- Refused (GO TO Q7) 7
- Don't know (GO TO Q7) 8

6a. [IF DIDN'T APPLY] I would like to ask a few questions about why you did not apply for the **Small Business Loan Program**. For each of the following statements, please tell me if this was a **primary reason** you did not apply, was **part of the reason** you did not apply, or was **not a reason** why you did not apply.

	Would you say it was . .				
	Primary reason,	Part of the reason, or	Not a reason?	REF	DK
1. Your business was not eligible for the Small Business Loan Program (IF 1 GO TO Q7)	1	2	3	7	8
2. Your business did not need this type of assistance or service	1	2	3	7	8
3. Did not have time to apply or found out too late	1	2	3	7	8
4. Did not know how or where to apply	1	2	3	7	8
[5.Removed]					
6. The application process required too much paperwork or other demands	1	2	3	7	8
7. The requirements for participation were too restrictive	1	2	3	7	8
8. The level of support did not match your business' level of need (e.g., grants were too small)	1	2	3	7	8

(GO TO Q7)

- 6b. [IF APPLIED/DIDN'T RECEIVE] Were you given a reason why you were not able to participate in the **Small Business Loan Program**?
- Yes 1
- No (GO TO Q7) 2
- Refused (GO TO Q7)..... 7
- Don't know (GO TO Q7) 8

6c. What was the reason you did not receive a loan?

(GO TO Q7)

6d. [IF RECEIVED] I am going to read a list of potential reasons why a business might choose to participate in the **Small Business Loan Program**. Please tell me, for each reason, if it was a **primary reason** you chose to participate, **part of the reason**, or **not a reason**.

	Would you say it was . . .				
	Primary reason,	Part of the reason, or	Not a reason?	REF	DK
1. The Small Business Loan Program met a specific need for your business	1	2	3	7	8
2. The terms or requirements of the Small Business Loan Program were favorable	1	2	3	7	8
3. You were asked to participate in the Small Business Loan Program	1	2	3	7	8

- 6e. Overall, how would you rate the effectiveness of the **Small Business Loan Program**? Would you say...
- Very effective,..... 1
- Somewhat effective, or 2
- Not effective?.....3
- Refused 7
- Don't know 8

6f. What was the best thing about the **Small Business Loan Program**?

6g. How could the **Small Business Loan Program** be improved?

Q7 =====

7. [ST. PAUL BUSINESSES ONLY – OTHERS GO TO Q8] During the first year of construction, were you aware of and did you receive funds from the **Parking Loan Program** offered by the **City of Saint Paul**? Would you say you were... [IF NEEDED: Forgivable loans for improvements to off-street parking along University Avenue.]

- Not aware of these funds, (GO TO Q8) 1
- Aware of, but did not apply, (GO TO Q7a)..... 2
- Applied, but did not receive, or (GO TO Q7b).....3
- Received these funds? (GO TO Q7d).....4
- Refused (GO TO Q8)..... 7
- Don't know (GO TO Q8)..... 8

7a. [IF DIDN'T APPLY] I would like to ask a few questions about why you did not apply for the **Parking Loan Program**. For each of the following statements, please tell me if this was a **primary reason** you did not apply, was **part of the reason** you did not apply, or was **not a reason** why you did not apply.

	Would you say it was . . .				
	Primary reason,	Part of the reason, or	Not a reason?	REF	DK
1. Your business was not eligible for the Parking Loan Program (IF 1 GO TO Q8)	1	2	3	7	8
2. Your business did not need this type of assistance or service	1	2	3	7	8
3. Did not have time to apply or found out too late	1	2	3	7	8
4. Did not know how or where to apply	1	2	3	7	8
5. There was no space left in the program	1	2	3	7	8
6. The application process required too much paperwork or other demands	1	2	3	7	8
7. The requirements for participation were too restrictive	1	2	3	7	8
8. The level of support did not match your business' level of need (e.g., grants were too small)	1	2	3	7	8

(GO TO Q8)

7b. [IF APPLIED/DIDN'T RECEIVE] Were you given a reason why you were not able to participate in the **Parking Loan Program**?

- Yes 1
- No (GO TO Q8) 2
- Refused (GO TO Q8)..... 7
- Don't know (GO TO Q8) 8

7c. What was the reason you did not receive this assistance?

(GO TO Q8)

7d. [IF RECEIVED] I am going to read a list of potential reasons why a business might choose to participate in the **Parking Loan Program**. Please tell me, for each reason, if it was a **primary reason** you chose to participate, **part of the reason**, or **not a reason**.

(What about . . .)	Would you say it was. . .				
	Primary reason,	Part of the reason, or	Not a reason?	REF	DK
1. The Parking Loan Program met a specific need for your business	1	2	3	7	8
2. The terms or requirements of the Parking Loan Program were favorable	1	2	3	7	8
3. You were asked to participate in the Parking Loan Program	1	2	3	7	8

(GO TO Q8)

7e. Overall, how would you rate the effectiveness of the **Parking Loan Program**? Would you say...

- Very effective,..... 1
- Somewhat effective, or 2
- Not effective?..... 3
- Refused 7
- Don't know 8

7f. What was the best thing about the **Parking Loan Program**?

7g. How could the **Parking Loan Program** be improved?

Q8 =====

8. During the first year of construction, did you receive any **construction-related services** from the **University Avenue Business Preparation Collaborative (U7)**? Also called "U7".

- Yes 1
- No (GO TO Q9) 2
- Refused (GO TO Q9) 7
- Don't know (GO TO Q9) 8

8a. What **construction-related services** did you receive from the **University Avenue Business Preparation Collaborative (U7)**?

8b. Overall, how would you rate the effectiveness of the **U7 services**? Would you say...

- Very effective,..... 1
- Somewhat effective, or 2
- Not effective?..... 3
- Refused 7
- Don't know 8

8c. What was the best thing about the **U7 services**?

8d. How could the **U7 services** be improved?

Q9 =====

9. During the first year of construction, did you participate in the “Buy Local” coupon book program through the Midway Chamber of Commerce? Would you say you were...

- Not aware of this program, (GO TO Q10) 1
- Aware of, but did not participate, or (GO TO Q9a)..... 2
- Participated in the program? (GO TO Q9b).....3
- Refused (GO TO Q10) 7
- Don’t know (GO TO Q10)..... 8

9a. [IF AWARE OF, BUT DID NOT PARTICIPATE] I would like to ask a few questions about why you did not participate in the “Buy Local” coupon book program. For each of the following statements, please tell me if this was a **primary reason** you did not participate, was **part of the reason**, or was **not a reason** why you did not participate.

	Would you say it was. . .				
	Primary reason,	Part of the reason, or	Not a reason?	REF	DK
1. Your business was not eligible for this program (IF 1, GO TO Q10)	1	2	3	7	8
2. Your business did not need this type of assistance or service	1	2	3	7	8
3. Did not have time to apply or found out too late	1	2	3	7	8
4. Did not know how or where to apply	1	2	3	7	8
5. There was no space left in the program	1	2	3	7	8
6. The application process required too much paperwork or other demands	1	2	3	7	8
7. The requirements for participation were too restrictive	1	2	3	7	8
8. The level of support did not match your business’ level of need (e.g., grants were too small)	1	2	3	7	8

(GO TO Q10)

9b. [IF PARTICIPATED] I am going to read a list of potential reasons why a business might choose to participate in the “Buy Local” coupon book program. Please tell me, for each reason, if it was a **primary reason** you chose to participate, **part of the reason**, or **not a reason**.

	Would you say it was. . .				
	Primary reason,	Part of the reason, or	Not a reason?	REF	DK
1. The coupon book program met a specific need for the business	1	2	3	7	8
2. The terms or requirements of the coupon book program were favorable	1	2	3	7	8
3. You were asked to participate in the coupon book program	1	2	3	7	8

(GO TO Q10)

9c. I would like to ask you a few questions about the effectiveness of the **coupon book** program.

How effective was the “Buy Local” coupon book program in...	Would you say...				
	Very effective,	Somewhat effective, or	Not effective?	REF	DK
1. Increasing customers’ awareness of your business	1	2	3	7	8
2. Increasing your business’s customer traffic	1	2	3	7	8
3. Increasing your business’s revenue	1	2	3	7	8
4. Increasing customer access to your business	1	2	3	7	8

9d. Overall, how would you rate the effectiveness of the “Buy Local” coupon book program? Would you say ...

- Very effective,..... 1
- Somewhat effective, or 2
- Not effective?.....3
- Refused 7
- Don’t know 8

9e. What was the best thing about the “Buy Local” coupon book program?

9f. How could the “Buy Local” coupon book program be improved?

[IF BUSINESS IS NOT A RESTAURANT>>>> SKIP TO Q11]

Q10 =====

10. [RESTAURANTS ONLY – OTHERS GO TO Q11] Did you participate in the **Progressive Dinner** organized by the **Midway Chamber of Commerce** in December 2011? Would you say you were...

- Not aware of this event, (GO TO Q11) 1
- Aware of, but did not participate in the event, or (GO TO Q11)..... 2
- Participated in this event? (GO TO Q10a) 3
 - Refused (GO TO Q11) 7
 - Don't know (GO TO Q11) 8

10a. I would like to ask you a few questions about the effectiveness of the **Progressive Dinner**.

How effective was the Progressive Dinner in...	Would you say it was...				
	Very effective,	Somewhat effective, or	Not effective?	REF	DK
1. Increasing customers' awareness of your business	1	2	3	7	8
2. Increasing your business's customer traffic	1	2	3	7	8
3. Increasing your business's revenue	1	2	3	7	8
4. Increasing customer access to your business	1	2	3	7	8

10b. Overall, how would you rate the effectiveness of the **Progressive Dinner**? Would you say...

- Very effective,..... 1
- Somewhat effective, or 2
- Not effective?..... 3
 - Refused 7
 - Don't know 8

10c. What was the best thing about the **Progressive Dinner**?

10d. How could the **Progressive Dinner** be improved?

Q11 =====

11. During the first year of construction, were you aware of the **communications efforts to highlight or feature Central Corridor businesses or events** in the weekly newsletter of the **Central Corridor Project Office**?

- Yes 1
- No (GO TO Q12)..... 2
 - Refused (GO TO Q12) 7
 - Don't know (GO TO Q12) 8

11a. I would like to ask you a few questions about the effectiveness of the Central Corridor Project Office **communications efforts**.

How effective were the communication efforts in...	Would you say it was...				
	Very effective,	Somewhat effective, or	Not effective?	REF	DK
1. Increasing customers' awareness of your business	1	2	3	7	8
2. Increasing your business's customer traffic	1	2	3	7	8
3. Increasing your business's revenue	1	2	3	7	8
4. Increasing customer access to your business	1	2	3	7	8

11b. Overall, how would you rate the effectiveness of the Project Office **communication efforts**? Would you say...

- Very effective,..... 1
- Somewhat effective, or 2
- Not effective?.....3
- Refused 7
- Don't know 8

11c. What was the best thing about the Project Office **communication efforts**?

11d. How could the Project Office **communication efforts** be improved?

Q12 =====

12. Did this business receive or participate in any **OTHER services, assistance, programs, or efforts to help offset the effects of construction** that were offered by an **external** organization, government program, or another group? (NOTE: Only record if program is offered by an external source. Any independent actions undertaken by the individual business are recorded in the next section)

- Yes 1
- No (GO TO Q13a)..... 2
- Refused (GO TO Q13) 7
- Don't know (GO TO Q13) 8

12a. What were they? [IF NEEDED: Other services, assistance, programs, or efforts to offset the effects of construction that this business participated in.]

Q13 =====

13a. What types of assistance do you think provide the best support to the businesses affected by Central Corridor Light Rail Construction?

13b. I would like to ask you a few questions about what types of services you would find helpful to offset the effects of construction. For each item, please tell me if you think it would be **very helpful**, **somewhat helpful**, or **not helpful**.

(How about...)	Would you say it was . . .				
	Very helpful,	Somewhat helpful, or	Not helpful?	REF	DK
1. General low/no interest operating loans to cover short-term losses or operational expenses.	1	2	3	7	8
2. Technical assistance for business planning or strategy.	1	2	3	7	8
3. Financial assistance to provide additional marketing, promotion, or advertising.	1	2	3	7	8
4. Technical assistance to provide additional marketing, promotion, or advertising.	1	2	3	7	8

SECTION IV: Strategies of the business

Now, we would like to ask a few questions about any potential actions your business has taken to help offset effects of the Central Corridor Light Rail construction. Please note that we are interested in any additional actions the business has taken that would not have been pursued if not for the construction.

Q14 =====

14. During the first year of Light Rail construction, did your business purchase and display any **additional signage** to help customers navigate the construction or to indicate the business was open? (NOTE: This only includes signs that are at or near the business. Near = Five blocks.)

- Yes 1
- No (GO TO Q15)..... 2
- Refused (GO TO Q15)..... 7
- Don't know (GO TO Q15) 8

14a. About how much did the business spend on **additional** signage? \$_____

- Refused-7
- Don't know-8

14b. I would like to ask you a few questions about the effectiveness of the **additional signage**.

How effective was the signage in...	Would you say...				
	Very effective,	Somewhat effective, or	Not effective?	REF	DK
1. Increasing awareness of the business	1	2	3	7	8
2. Increasing the business' customer traffic	1	2	3	7	8
3. Increasing the business' revenue	1	2	3	7	8
4. Increasing customer access to the business	1	2	3	7	8
5. Providing return on the initial investment	1	2	3	7	8

Q15 =====

15. During the first year of construction, did this business purchase any **additional TV, radio, or print advertising** to attract or retain customers because of construction? (**REMINDER:** This only includes additional advertising above and beyond the business's normal advertising.)

- Yes 1
- No (GO TO Q16)..... 2
- Refused (GO TO Q16)..... 7
- Don't know (GO TO Q16) 8

15a. About how much did the business spend on **additional** advertising? \$ _____

- Refused -7
- Don't know -8

15b. I would like to ask you a few questions about the effectiveness of the **additional advertising**.

How effective was the advertising in...	Would you say it was...				
	Very effective,	Somewhat effective, or	Not effective?	REF	DK
1. Increasing awareness of the business	1	2	3	7	8
2. Increasing the business' customer traffic	1	2	3	7	8
3. Increasing the business' revenue	1	2	3	7	8
4. Increasing customer access to the business	1	2	3	7	8
5. Providing return on the initial investment	1	2	3	7	8

Q16 =====

16. During the first year of construction, did this business run any **additional coupons, deals, or other promotional offers** to attract or retain customers to the business because of construction?

- Yes 1
- No (GO TO Q17a)..... 2
- Refused (GO TO Q17a)..... 7
- Don't know (GO TO Q17a)..... 8

16a. About how much did the business spend on **additional** promotional offers? \$ _____
 Refused-7
 Don't know-8

16b. I would like to ask you a few questions about the effectiveness of the **promotional offers**.

How effective were the promotional offers in...	Would you say it was...				
	Very effective,	Somewhat effective, or	Not effective?	REF	DK
1. Increasing awareness of the business	1	2	3	7	8
2. Increasing the business' customer traffic	1	2	3	7	8
3. Increasing the business' revenue	1	2	3	7	8
4. Increasing customer access to the business	1	2	3	7	8
5. Providing return on the initial investment	1	2	3	7	8

Q17 =====

17a. During the first year of construction, did this business do any other activities intended to offset the effects of the Central Corridor Light Rail construction?
 Yes 1
 No (GO TO Q18a) 2
 Refused (GO TO Q18a)..... 7
 Don't know (GO TO Q18a)..... 8

17b. What were they? [IF NEEDED: Other activities or efforts to help offset the effects of construction that this business participated in?]

SECTION V: Future business outlook

18a. Do you expect this business will be operating in its current location in **FIVE YEARS**?
 Yes (GO TO Q19) 1
 No 2
 Refused (GO TO Q19)..... 7
 Don't know 8

18b. [IF NO | DK] Why do you say that?

19. Over the next **FIVE YEARS**, do you expect each of the following measures of your business's size will increase, decrease, or stay about the same?

(How about...)	Would you say it will ...						REF	DK
	Decrease a lot	Decrease a little	Stay the same	Increase a little	Increase a lot			
1. Sales	1	2	3	4	5	7	8	
2. Profits	1	2	3	4	5	7	8	
3. Number of employees	1	2	3	4	5	7	8	
4. Employee wage levels	1	2	3	4	5	7	8	

SECTION VI: Business/owner demographics

Finally, I would like to ask a few questions about you and this business.

20. What is your gender?

- Male 1
- Female..... 2
- Other 3
- Refused 7
- Don't know 8

21. Do you consider yourself Hispanic or Latino/a?

- Yes 1
- No 2
- Refused 7
- Don't know 8

22. Is your race or ethnic background...[CHECK ALL THAT APPLY]

- African American or Black,..... 1
- African Born, 2
- American Indian or Alaskan Native, 3
- Asian or Pacific Islander,..... 4
- White or Caucasian, or..... 5
- Some other group?..... 6
- Refused 7
- Don't know 8

23a. Were you born outside of the United States?

- Yes 1
- No 2
- Refused 7
- Don't know 8

- 23b. Were either of your parents born outside of the United States?
- Yes 1
 - No 2
 - Refused 7
 - Don't know 8
24. How many people currently work at this location? _____ People
- Refused -7
 - Don't know -8
25. Does this business own or rent its business space? (This location)
- Own..... 1
 - Rent..... 2
 - Other (SPECIFY _____)..... 3
 - Refused 7
 - Don't know 8

Thank you! That is all of the questions I have for you today.