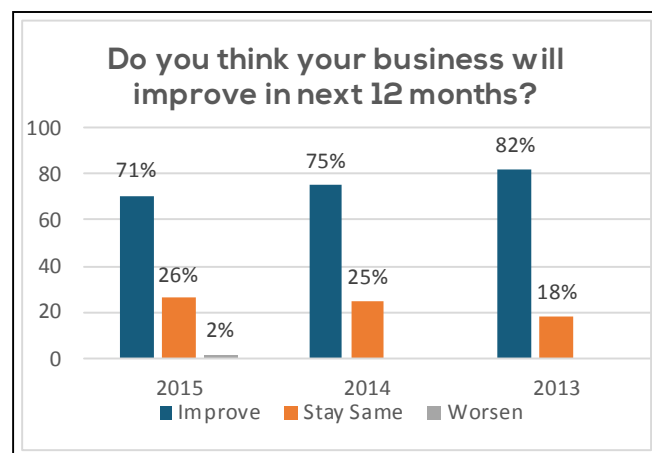
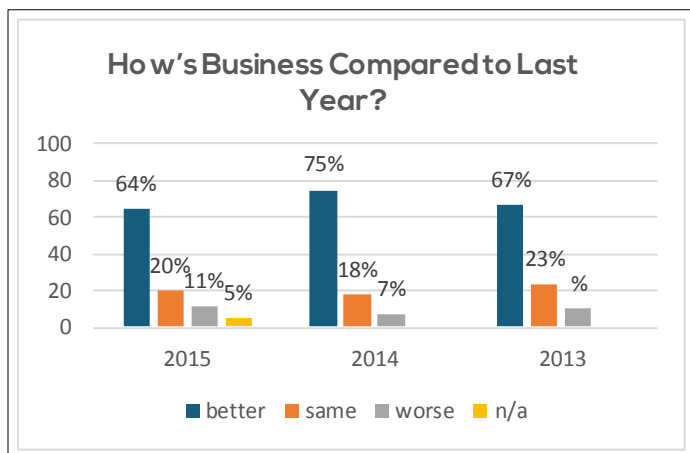


Your Business: A Temperature Read



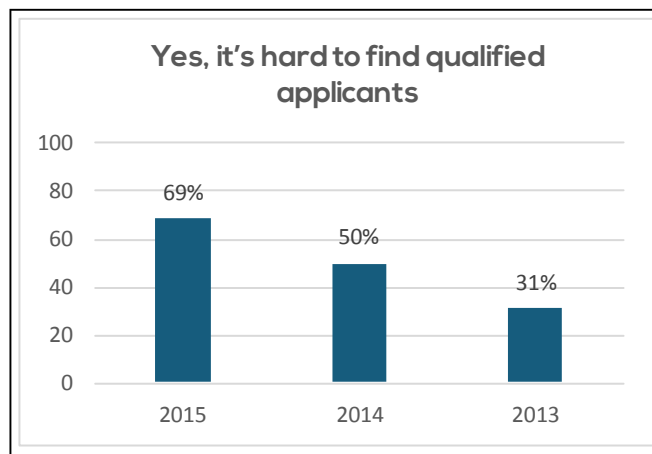
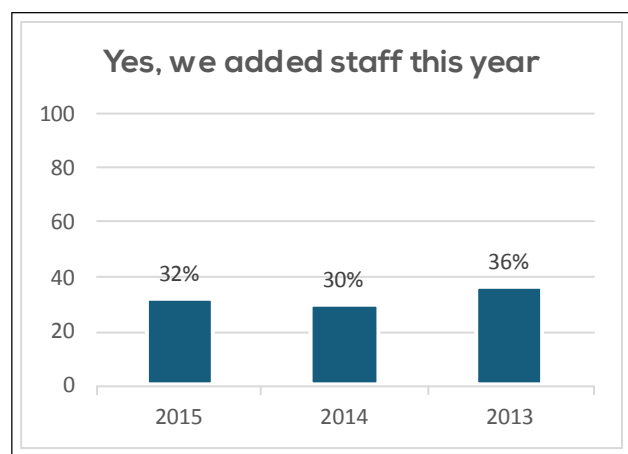
What is the biggest issue facing your business?

2015	2014	2013
Cost of living Cost of doing business Ability to hire qualified staff	Cost of living Ability to hire qualified staff Regulations, taxes, fees	Cost of living Employee housing Employee work ethic

What are the new challenges you are facing compared to 5 years ago? (2015)

- Marketing and developing customer/client base
- Workforce issues (recruiting/retaining qualified employees)
- Housing availability/affordability
- Staying profitable in changing economy, increased regulations and/or rising cost of doing business
- Changes in consumer trends and/or competition

Workforce & Hiring



Asked in 2015:

What positions are hardest to fill?

- Sales, marketing, business development
- Customer service
- Cooks and culinary staff
- Skilled workers in specialty areas
- General entry level employees

Where does the majority of your workforce live?

57% - Sonoma Valley

25% - outside the area

18% - didn't know or don't have employees

Sonoma, the Community

Do you think the following aspects of our community are getting better, worse, or staying about the same? (X = not asked)

	2015	2014	2013
Affordability of housing for people who work here	↓	↓	X
Attractiveness to visitors	↑	X	↑
Availability of housing for people who work here	↓	↓	↓
Local schools	→	→	→
City services (in general)	→	X	→
Crime affecting local businesses	→	→	→
County road conditions	↓	↓	↓

What would you say is the biggest challenge facing the Sonoma business community?

2015: Rising costs & hiring qualified employees

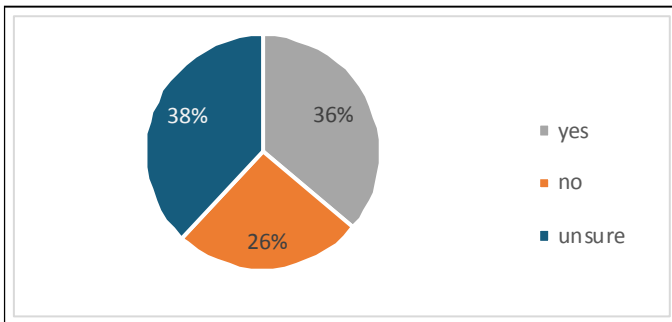
2014: Quality of workforce & lack of higher education/training

2013: Cost of employee benefits/general cost of living

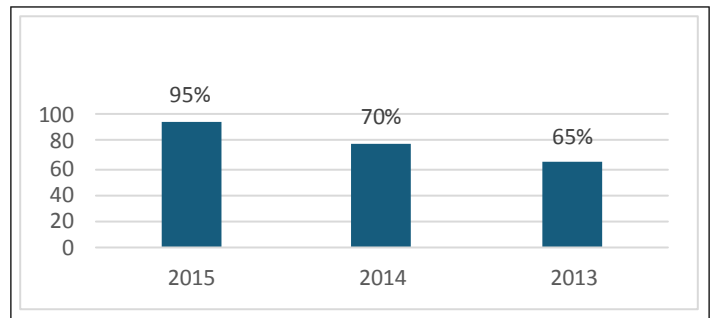
What are the biggest challenges facing Sonoma's business community and local economy in the coming years? (2015)

#1— Cost of living	#2— Ability to hire qualified employees
#3— Cost of doing business	#4— Changing consumer behavior (e.g. online shopping), increased competition

From a business perspective, would you say that Sonoma Valley is headed in the right direction? (2015)



Yes, I am generally satisfied with Sonoma Valley as a place to do business.



What would make Sonoma Valley a better place to do business? (asked in 2015)

More affordable housing for employees	Better business collaboration
B2B support and professionalism	Reduced regulations for business or development
More business diversity	Improved roads and/or expanded transit
Continued improvement of the Springs corridor	

About our Respondents

Which best describes your Sonoma Valley business location: (2015)

- 49% Lease space
- 29% Own Space
- 19% Home-based

What were the gross annual revenues for your business? (2015)

- 37% = under \$500k
- 38% = \$500k - \$5M
- 17% = over \$5M

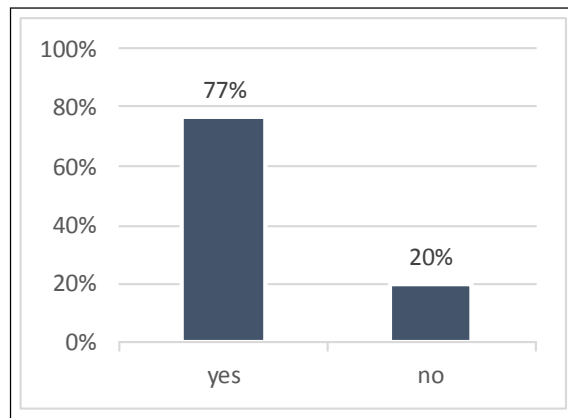
Who are your primary customers? (2015)

- #1** Sonoma Valley residents
- #2** Sonoma Valley businesses
- #3** Customers outside of Sonoma Valley
- #4** Visitors to Sonoma Valley

How many employees do you have?

	2015	2014	2013
Micro (<5)	40%	54%	50%
Large (>25)	25%	23%	20%

Do you (business owner) live in Sonoma Valley? (2015)



How many responses did we get?

2015 = 65

2014 = 40

2013 = 62