

SAN ANSELMO BUSINESS OUTLOOK SURVEY 2016 – SUMMARY

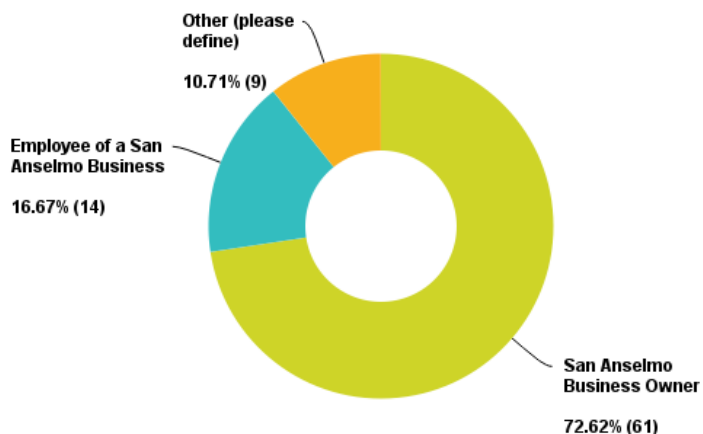
The EDC mailed a total of 601 merchant surveys to local business license holders and commercial property owners. The surveys were initially distributed by mail and then were followed up by in-person visits. As of May 31st, we had received 86 completed surveys or a 14.3% response rate.

Most of the respondents had a direct connection to a San Anselmo business. Owners or employees provided responses 77.3%

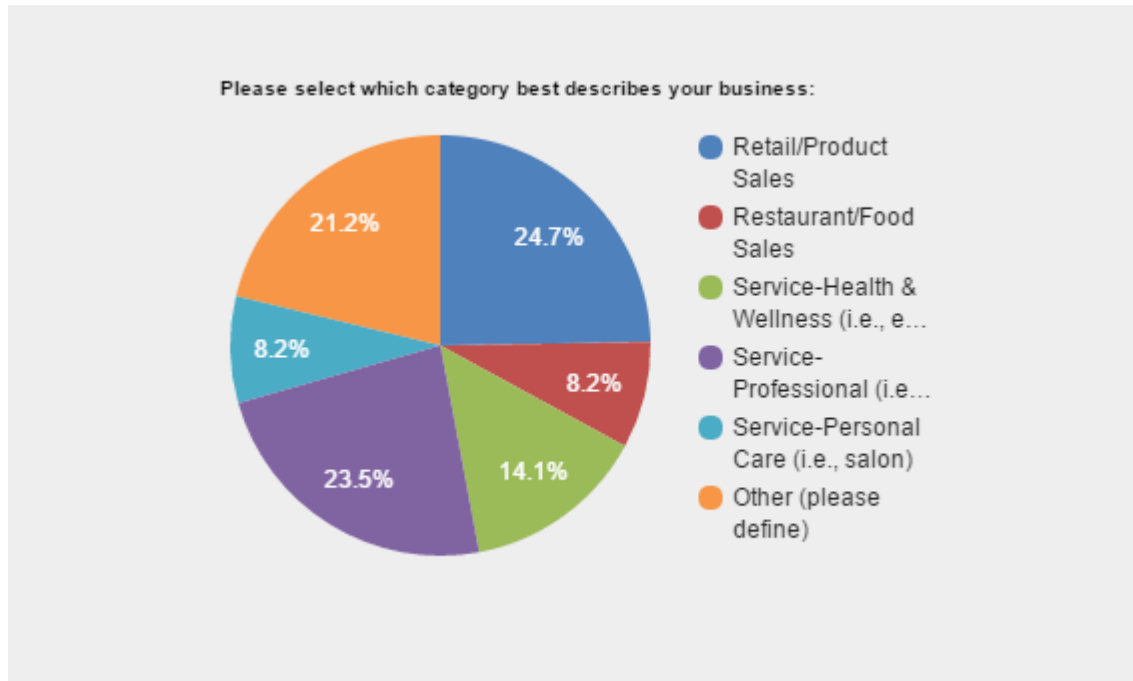
Of the 82 responses 62% had been in San Anselmo for more than 5 years and 37% had been in San Anselmo for more than 15 years. Only 24% had been in San Anselmo for 3 years or less, which suggests a certain staying power and mind-set

Q1 Please select which category best describes you:

Answered: 84 Skipped: 1



Q2

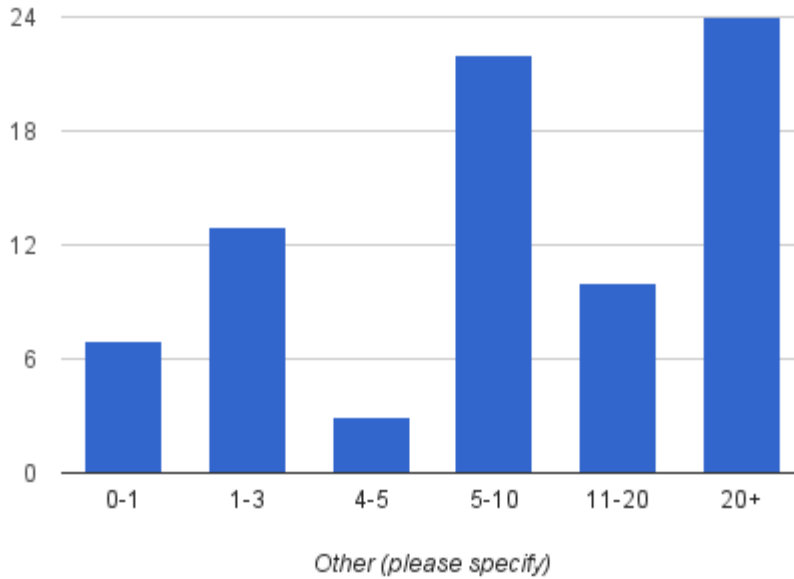


Other

1	Drycleaners
2	Service - Education/tutoring
3	Lodging
4	Corporate office of a raw botanical ingredient supplier
5	coaching/counseling
6	teacher
7	Economic development
8	Consulting
9	Own Tam Realty realty
10	remodeling contractor
11	Prescription Eyewear and Sunwear as well as Sunglasses
12	Business consulting
13	Dance & Theatre studio
14	medical clinic
15	Art: creation, education & sales
16	Resident
17	We source extraordinary green tea from Japan and sell it online. We also hire local ceramicists to create beautiful custom matcha bowls for us.
18	Retail Optical - Medical/fashion

Q3

How many years has your business operated in San Anselmo?

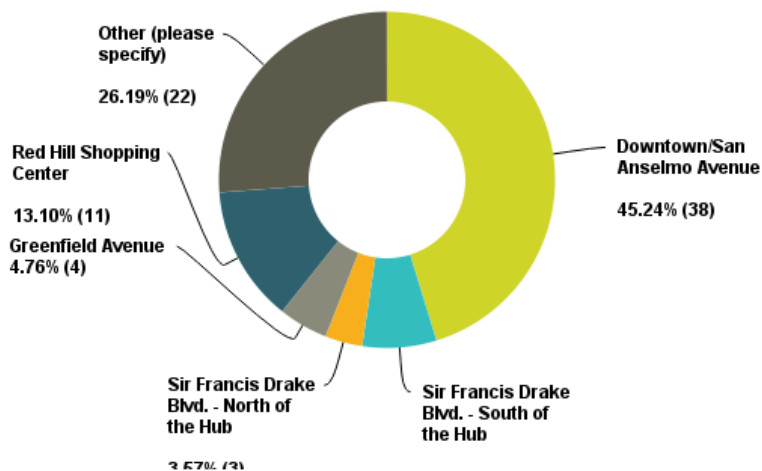


Q4

The median number of employees employed by respondents is 10 with a low of 0 (!) and a high of 700.

Q5 Where is your business located in San Anselmo?

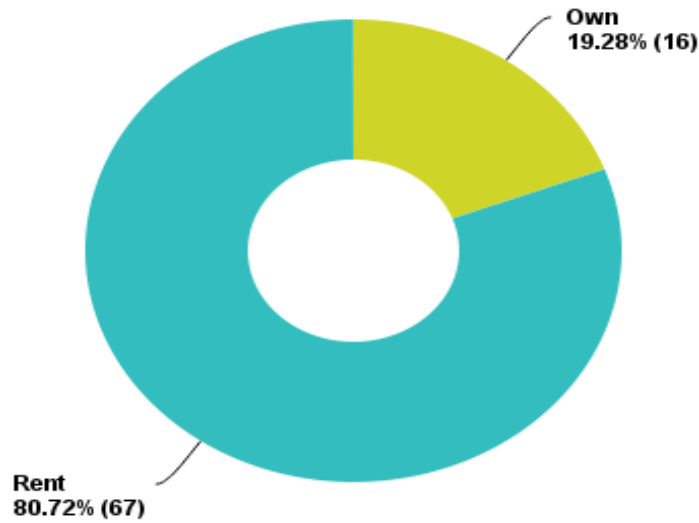
Answered: 84 Skipped: 2



Q5

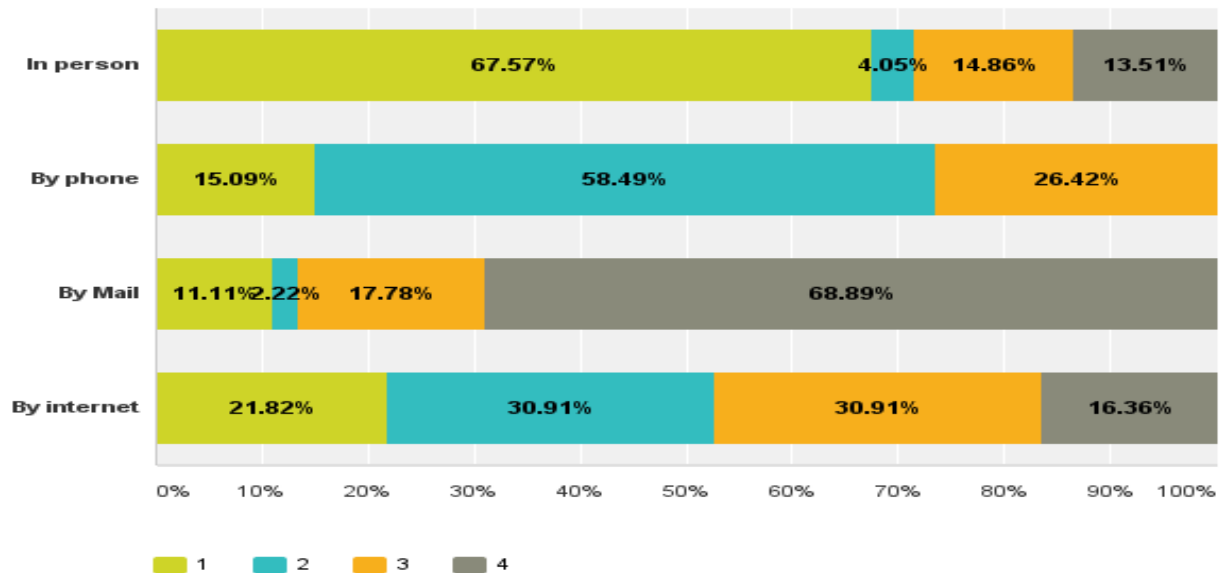
Q6 Do you own or rent the building/space in which your business is located?

Answered: 83 Skipped: 2



Q7 How do most of your customer do business with you? Rank 1 - 4 with 1 being the most common.

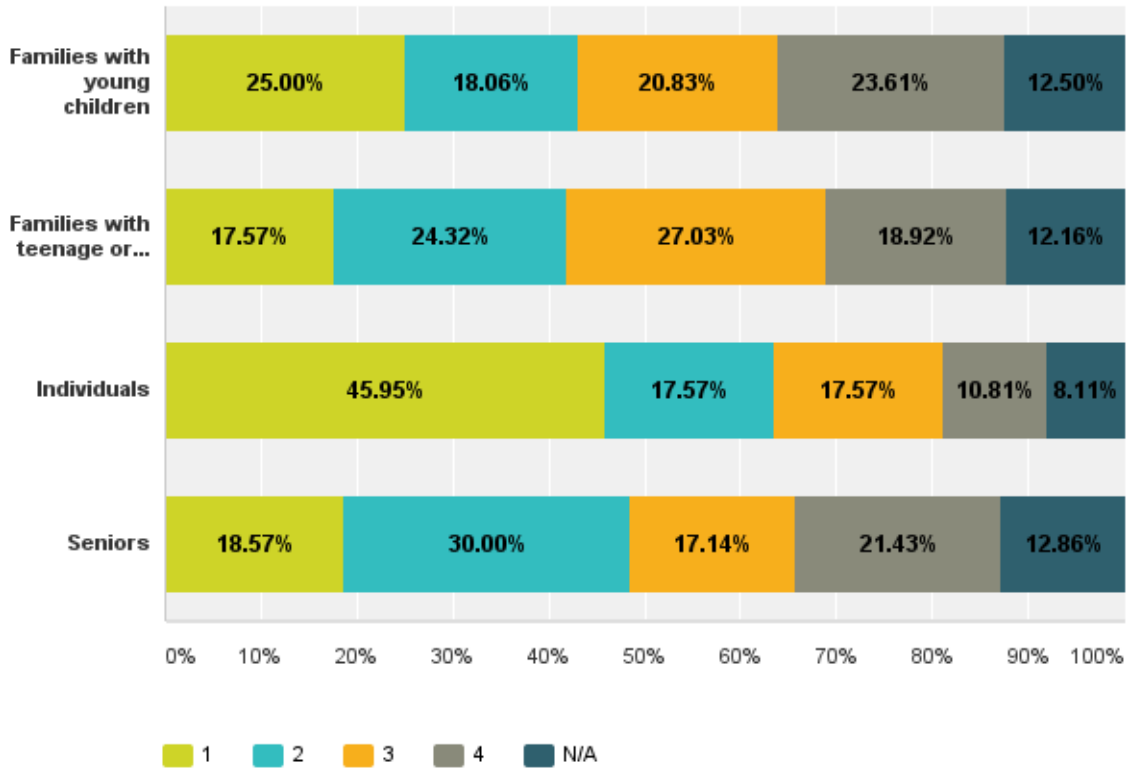
Answered: 79 Skipped: 6



Q8

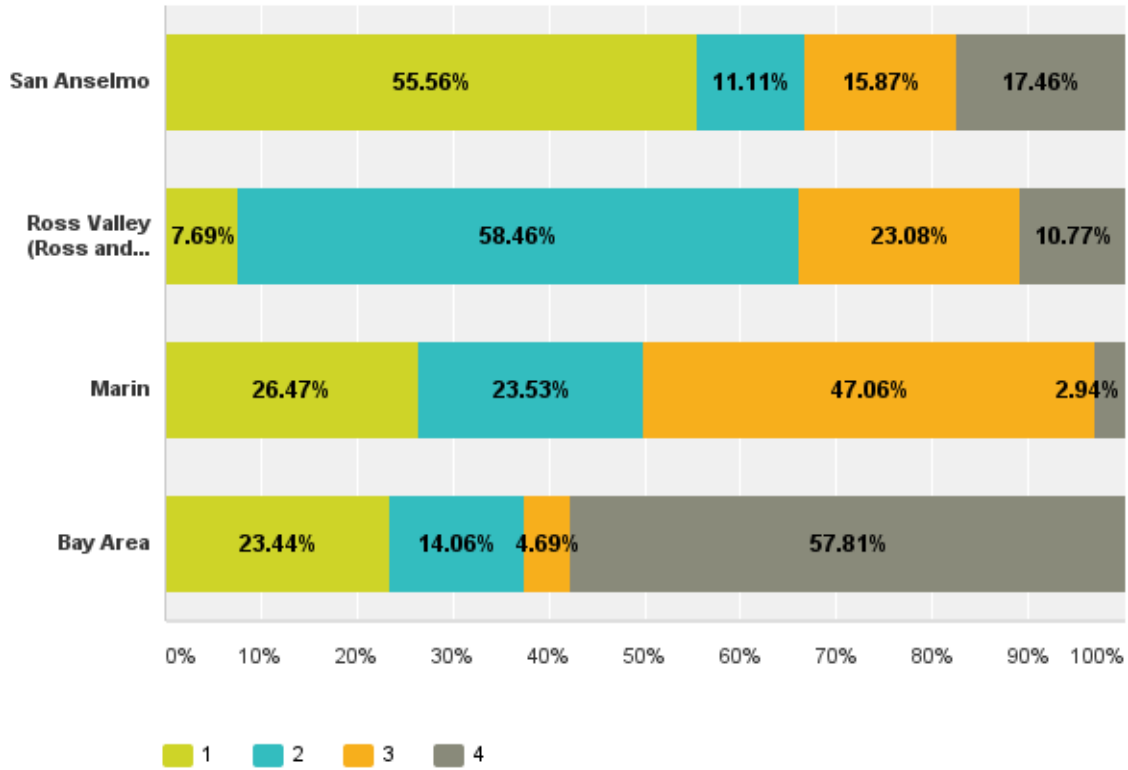
Q8 Which category best describes the majority of your customers? Rank 1 - 4 with 1 being the most common.

Answered: 77 Skipped: 8



Q9 Where are the majority of your customer coming from? Rank 1 - 4 with 1 being the most common.

Answered: 77 Skipped: 8



2016 San Anselmo Business Outlook Survey

Q10 Ideally, where would you like to draw more customers from? (area)

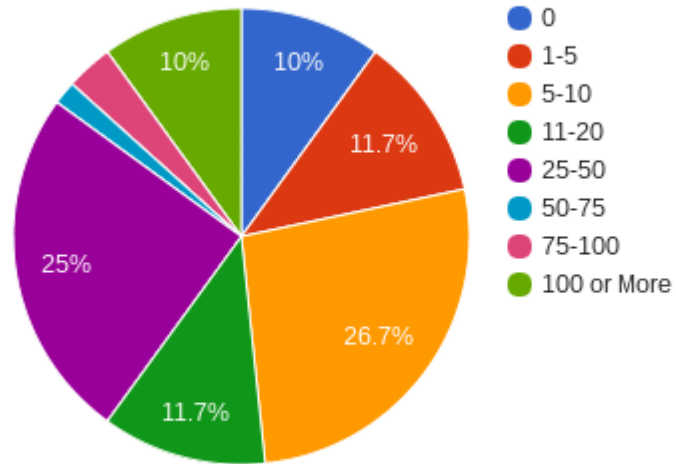
Answered: 68 Skipped: 18

#	Responses	Date
1	Fairfax, San Rafael, Kentfield, Ross	5/4/2016 8:41 AM
2	West Marin	4/27/2016 11:08 AM
3	San Anselmo and fair fax	4/26/2016 8:52 PM
4	San Anselmo, Ross, Kentfield & San Rafael	4/26/2016 5:28 PM
5	San Rafael	4/26/2016 1:01 PM
6	Everywhere	4/26/2016 11:14 AM
7	Ross Valley	4/23/2016 3:04 PM
8	Bay Area	4/22/2016 5:04 PM
9	CA	4/20/2016 8:21 AM
10	Bay Area	4/18/2016 12:35 PM
11	San Francisco	4/18/2016 11:52 AM
12	San Francisco Bay Area and North of Marin	4/15/2016 9:59 AM
13	Ross Valley	4/14/2016 9:39 PM
14	broader areas of Marin , north bay and San Francsico	4/13/2016 12:53 AM
15	San Francisco	4/12/2016 7:48 PM
16	Marin	4/8/2016 7:56 PM
17	West Marin, Surrounding Marin areas	4/7/2016 2:56 PM
18	everywhere	4/7/2016 1:58 PM
19	All of Marin	4/7/2016 1:52 PM
20	Marin	4/5/2016 6:48 PM
21	Marin	4/3/2016 9:28 PM
22	Marin	4/2/2016 7:02 PM
23	Fairfax, Greenbrae	4/1/2016 11:54 AM
24	san rafael	3/31/2016 4:59 PM
25	Ross/Kentfield and Larkspur	3/30/2016 1:51 PM
26	southern marin	3/30/2016 11:01 AM
27	SA,central Marin	3/29/2016 11:49 AM
28	walking distance	3/28/2016 6:36 PM
29	all areas	3/28/2016 5:51 PM
30	San Anselmo	3/28/2016 4:03 PM
31	Marin County	3/28/2016 10:12 AM
32	na	3/28/2016 9:32 AM
33	Anyone interested in business economics	3/28/2016 9:06 AM
34	sonoma county, napa county	3/27/2016 2:13 PM

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35	everywhere	3/27/2016 10:09 AM
36	marin	3/26/2016 3:55 PM
37	East Bay	3/26/2016 2:04 PM
38	San Anselmo	3/26/2016 7:15 AM
39	Fairfax San Rafael	3/25/2016 4:27 PM
40	nationwide	3/25/2016 2:36 PM
41	entire bay area	3/25/2016 1:57 PM
42	anywhere	3/25/2016 1:25 PM
43	Tiburon	3/25/2016 12:28 PM
44	Ross, Greenbrae, Kentfield, Petaluma	3/25/2016 12:19 PM
45	Larkspur, Corte Madera & Mill Valley	3/25/2016 12:07 PM
46	everywhere... town is horrible and slow now.	3/25/2016 11:37 AM
47	got enough thanks	3/25/2016 10:52 AM
48	San Rafael	3/25/2016 10:06 AM
49	San Anselmo	3/24/2016 11:23 PM
50	San Rafael	3/24/2016 9:33 PM
51	Mill Valley, San Rafael	3/24/2016 6:04 PM
52	We're pretty Marin-centric	3/24/2016 4:31 PM
53	San Francisco	3/24/2016 4:11 PM
54	We get customers from all over the world	3/24/2016 3:51 PM
55	Ross Valley	3/24/2016 3:18 PM
56	All over.	3/24/2016 3:08 PM
57	Marin	3/24/2016 2:37 PM
58	same area -	3/24/2016 1:15 PM
59	All over Marin	3/24/2016 11:57 AM
60	The entire world.	3/24/2016 11:21 AM
61	marin	3/24/2016 10:32 AM
62	San Anselmo	3/24/2016 10:21 AM
63	San Anselmo	3/24/2016 9:25 AM
64	Ross Valey	3/24/2016 9:18 AM
65	San Anselmo	3/23/2016 1:43 PM
66	everywhere	3/23/2016 12:08 PM
67	Larger trade area with San Anselmo primary	3/21/2016 5:30 PM
68	Anywhere	3/21/2016 2:23 PM

Q11

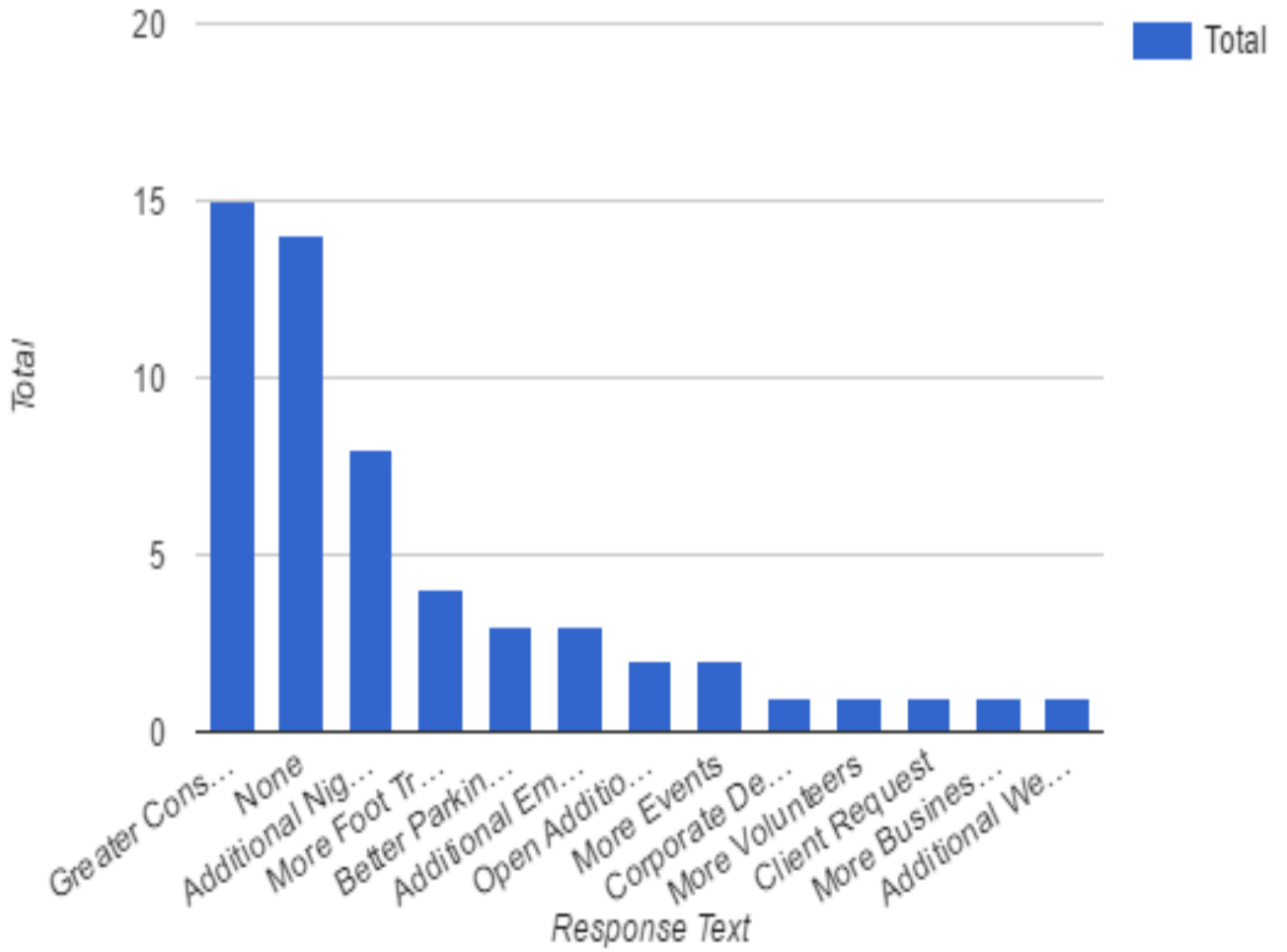


Q12 – When Are You Typically Open to the Public?

Data insufficient for analysis

Responses show 100% for all categories

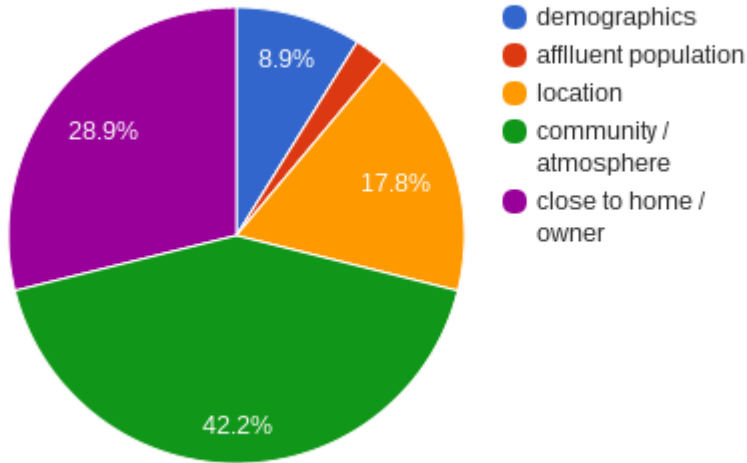
What factors would make you consider expanding your hours of operation?



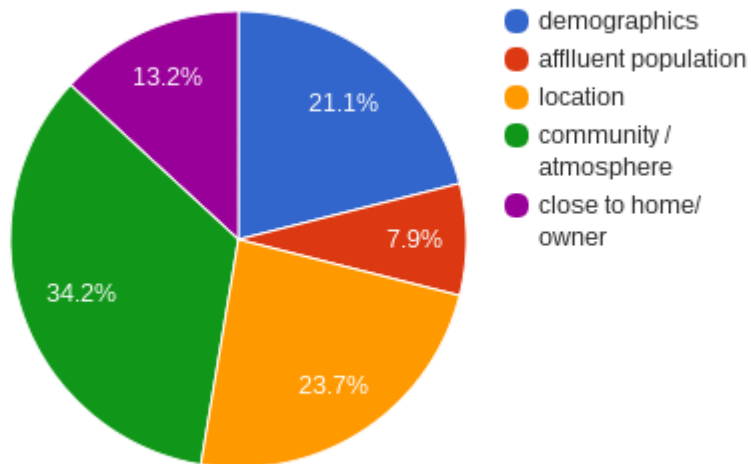
Q14

The three biggest advantages to do business in San Anselmo

Biggest Advantage to doing business in San Anselmo (first choice)



Biggest advantage to do business in San Anselmo (second choice)



Q15

In your opinion, what are the three biggest challenges for doing business in San Anselmo?

Most popular first choices

Parking (20)

Traffic (7)

Flood risk (5)

Most popular second choices

Parking (12)

Rent, traffic, business mix, fees, flood risk (5/4)

Most popular third choices

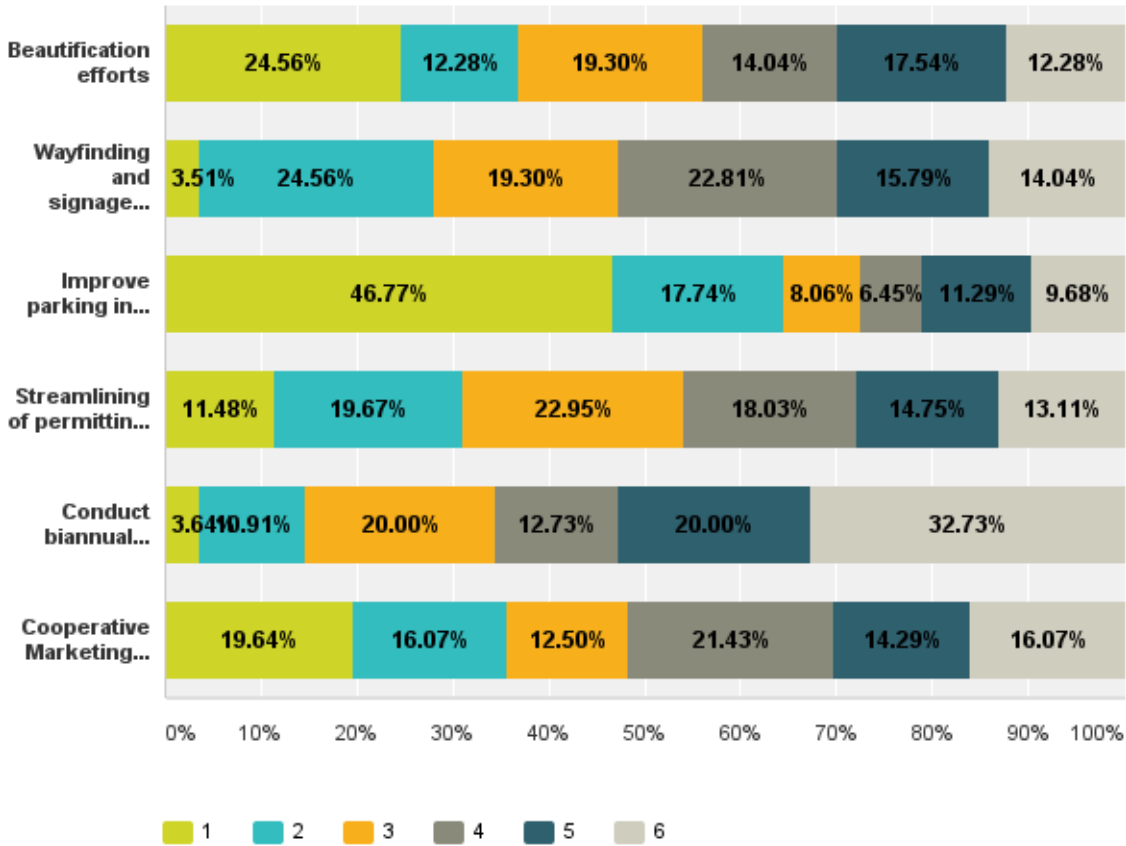
Flood risk (5)

Lack of concern by Town Council / Town Staff (5)

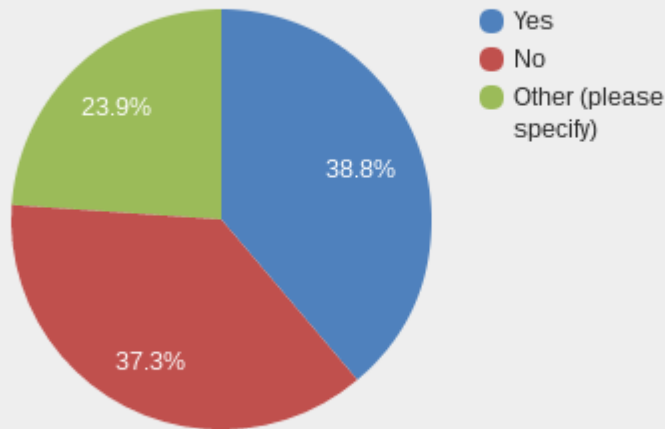
Business mix

Q16 Please rank these efforts in order of importance to you and your business. Rank 1 through 6 with 1 being the highest.

Answered: 67 Skipped: 18



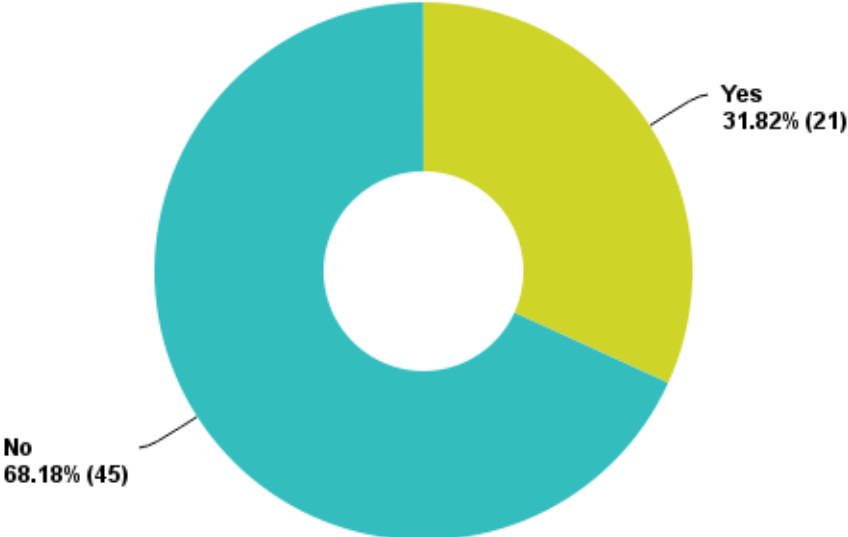
As a business owner or employee in San Anselmo, are you satisfied with the level of involvement of local government in the business community?



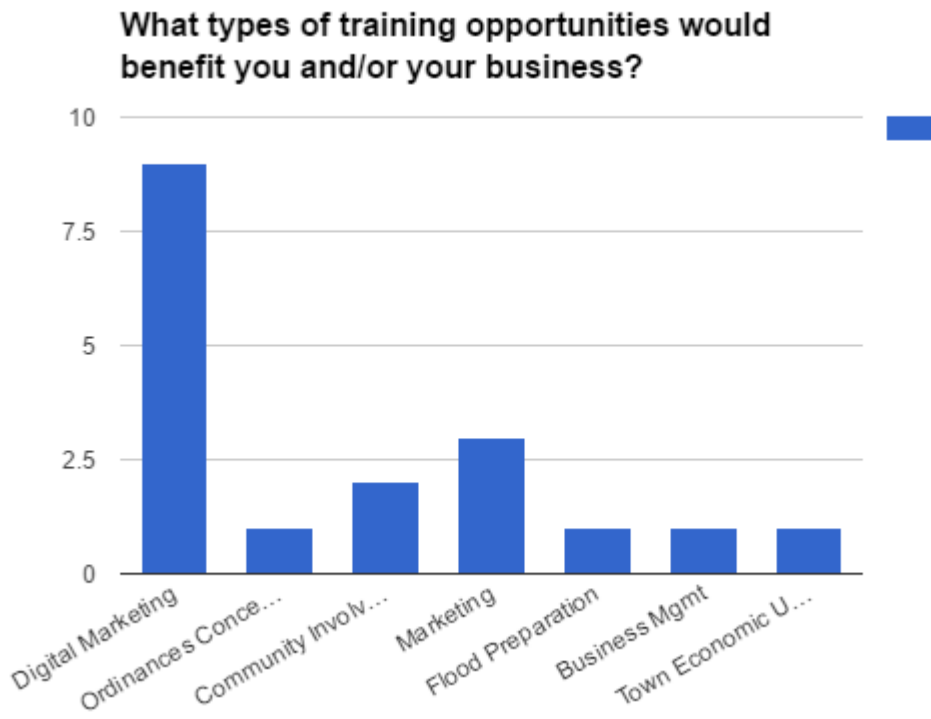
1	I don't really see it directly. Also, San Anselmo should really embrace it's fitness businesses and the money it bring in for the town. Yoga, martial arts, dance, pilates, cross training
2	I don't think we have been around long enough to opine.
3	I don't participate
4	There involvement hasnt really bstarted yet,they mentioned gting involved at a meetiiing a few mOnths ago but havent yet. I believe I know why,A deadline was pushed back.
5	when I asked to have the parking re-arranged to accomodate elderly clients, I was told it would be confusing.And we are pretty much forgotten being on the back side of San Anselmo ave. After the 2005 flood, the whole town got cleaned up except us. If I hadn't gone out and asked them to come we would still be walking in mud. Yet they never forget to ask for money for our business license.
6	Ordinances/resale inspections make it harder to do my job
7	local government is clueless and it doesn't care about the small business owner
8	make it easier to open a business
9	They do nothing
10	I don't have a conclusive opinion on this. I feel the efforts aren't geared toward the merchants making more money.
11	Unware of all the community events, need more.
12	Was this a joke question?
13	We operate independent of government & most of the business community, except for licensing and sales tax.
14	Town Hall should be open longer hours
15	Local government employees should meet the store owners.
16	N/A

Q18 Are you a member of the San Anselmo Chamber of Commerce?

Answered: 66 Skipped: 19

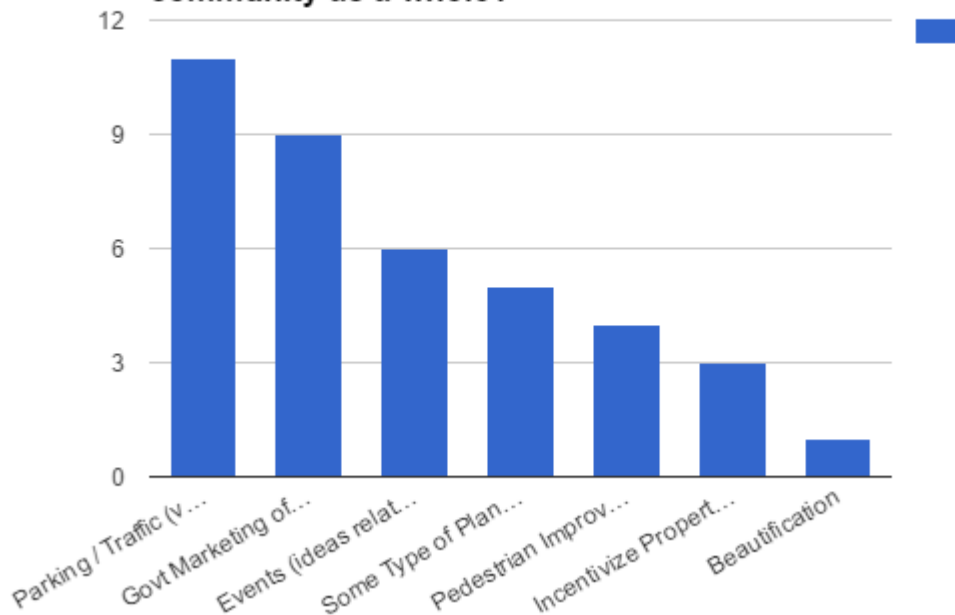


Q19



Q20

In what ways would you like to see the Town and the EDC support your business or the business community as a whole?



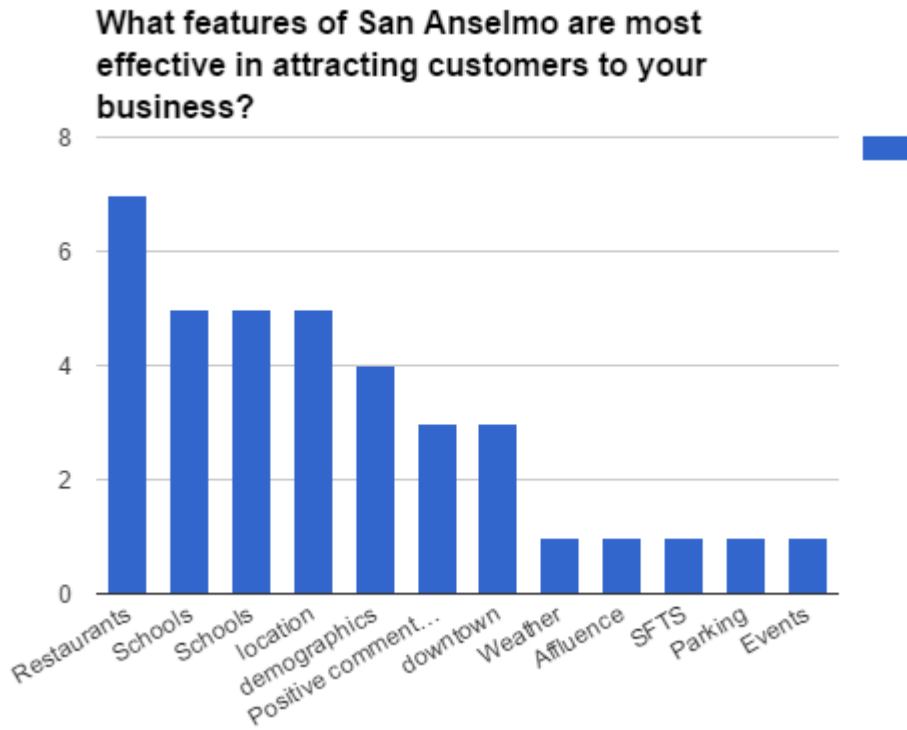
Q21

The EDC intends on conducting a survey of local consumers. What questions would you like to see included in the consumer survey?

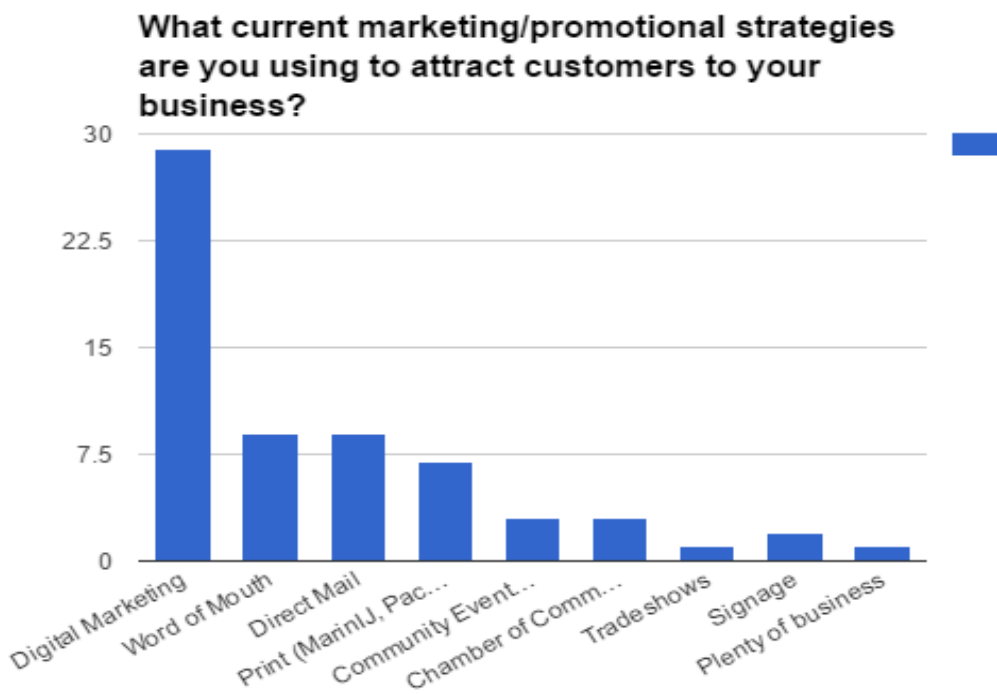
1	When visiting the shopping center how would you rate parking access by the food court
2	Is supplemental educational tutoring a service you would like to see more of in our community?
3	What would make you as a shopper return to downtown San Anselmo businesses?
4	What led you to do business here? What was unsatisfactory?
5	n/a
6	Again very different for our business type
7	After 27 years at Red Hill I have little confidence that surveys have value.
8	What sort of shops/services they would like to see on the avenue. How would they feel if it took on the vibrancy of 4th St in Berkeley?
9	What is lacking in San Anselmo? Bar? Nightlife? Outdoor festivals? Music?
10	What do they wish was in there town
11	Do you want to see the town maintain flower baskets & boxes?
12	awareness of what our non-profit offers
13	What would bring them to San Anselmo? What do they want to see more of?

14	What do they want?
15	Are there any types of business you would like to see in downtown? or wouldnt like to see.
16	How would they feel about putting second floors on our commercial buildings?
17	I would like to know if people want a movie theater or other night life
18	na
19	What products and services should be available in San Anselmo. Would you continue "big box" shopping if these products and services were available in Town at a slightly higher cost?
20	How do they like big business in town? where are the hardware stores, the variety store?
21	why does the town shut down so early on the street, why don't businesses stay open at night.
22	How offen do you not shop downtown out of fear of not finding perking.
23	Have them to support local
24	If parking is a reason they don't frequent the downtown area as often as they'd like.
25	What do you wish was in San Anselmo
26	What kind of monthly events EDC can sponsor to enage clients.
27	sugestions on how to improve PARKING!
28	What businesses would you like to see in SA?
29	Are you within walking distance of downtown?
30	What type of retail do residents want?
31	Do you know how many artists live in or create work in San Anselmo?
32	What kind of business do you with San Anselmo had, particularly in downtown
33	Are the looking for Designer Brands in shops?
34	our local business needs to know that we are here. any questions that would increase the likelihood that local business stays local would be great.
35	What types of stores and restaurants would appeal to you in downtown.
36	So do you want to see Susan's Store stay in San Anselmo?
37	what keeps you away from shopping/seeking services in San Anselmo
38	Will have to think on this.
39	How do you feel about your own finances? Are you optmistic/pesmistic?
40	What problems have they had finding parking? How many times have they moved on because of this.

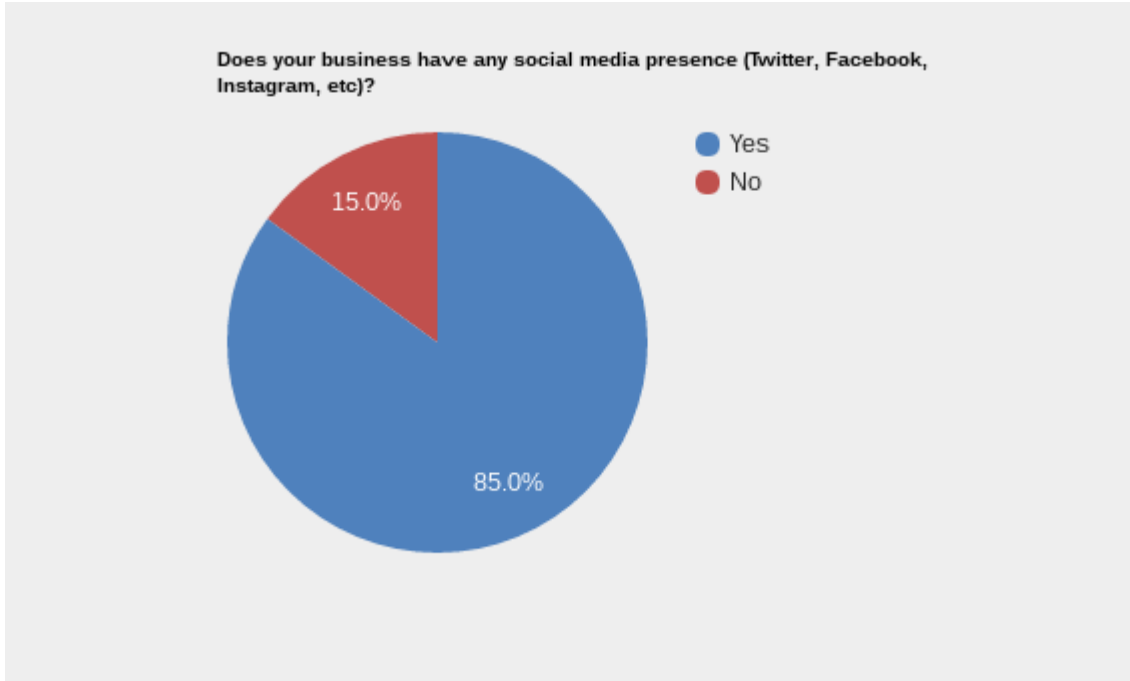
Q22



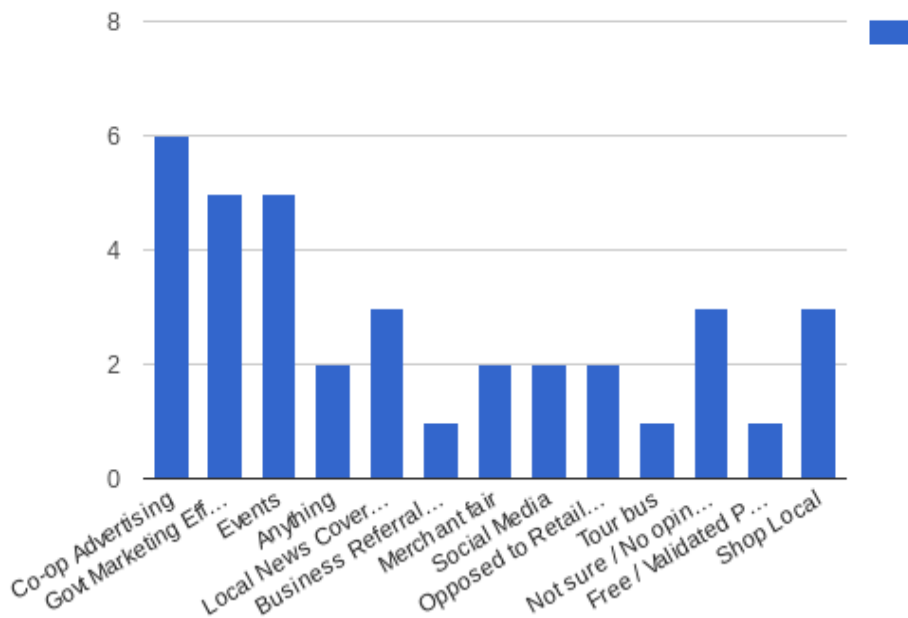
Q23



Q24

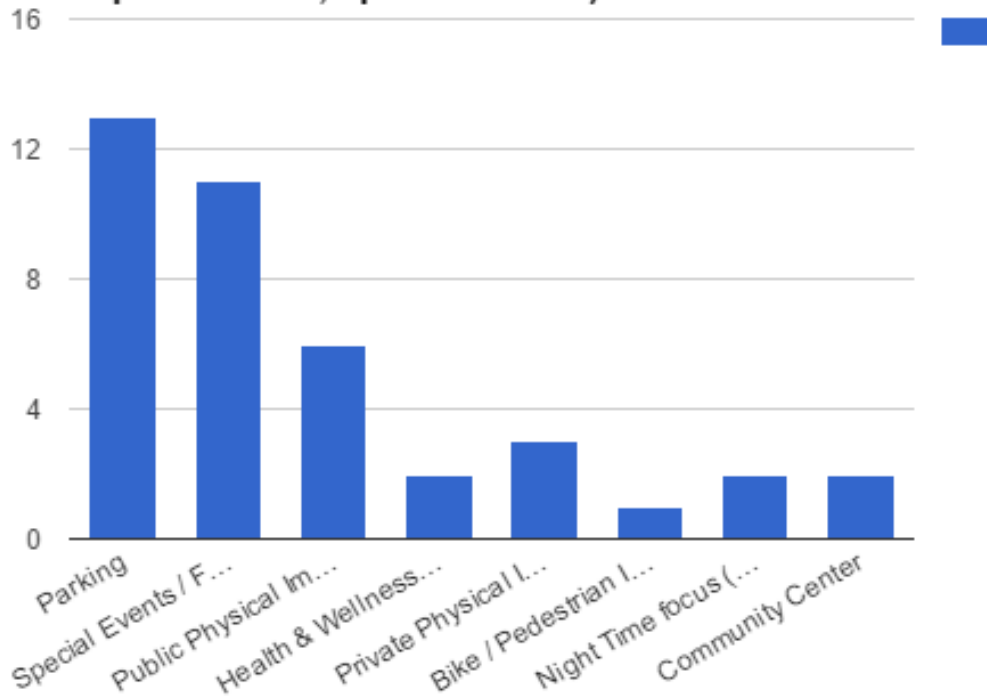


Q25 In your opinion, what types of cooperative marketing/promotional efforts could help support the business community?



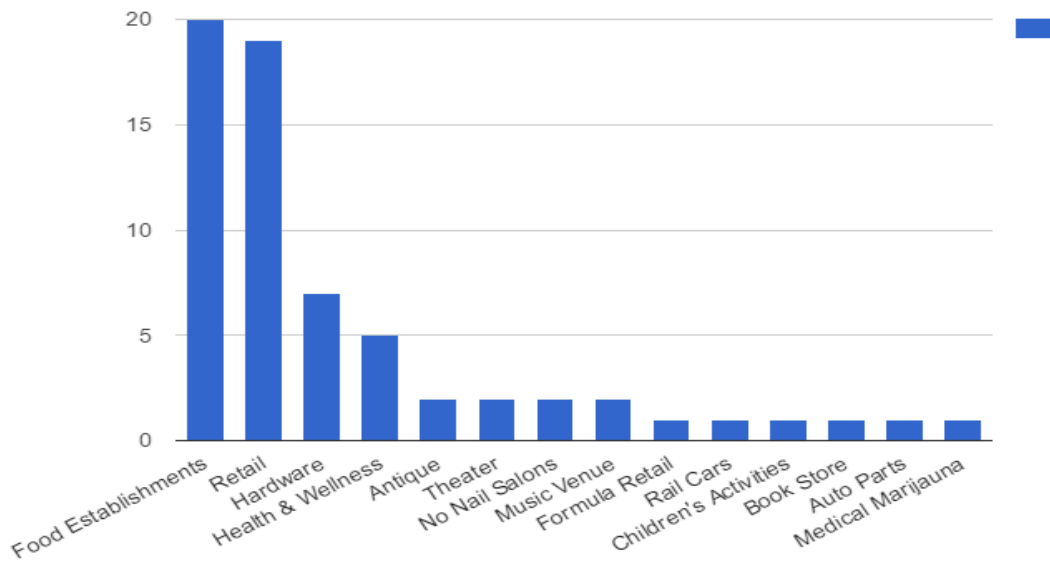
Q26

What community assets would improve San Anselmo business? (i.e., physical improvements, special events)



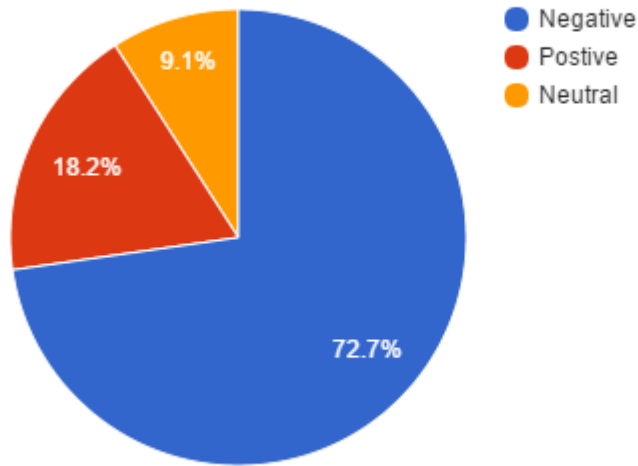
Q27

What types of businesses would you like to see in the existing vacant retail spaces?

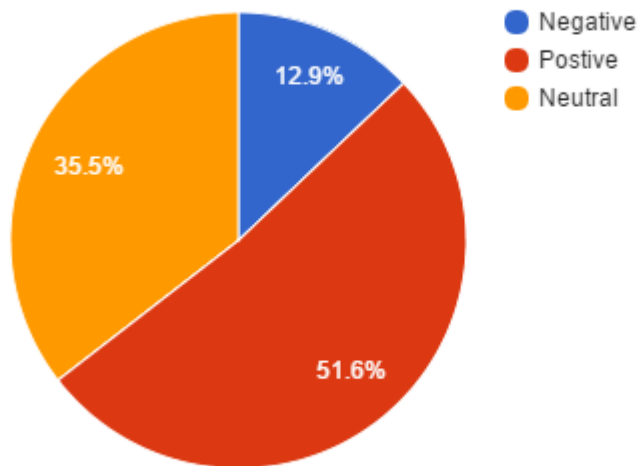


Q28

Downtown: How do the existing community events affect your business? (i.e., foot traffic, sales volume)

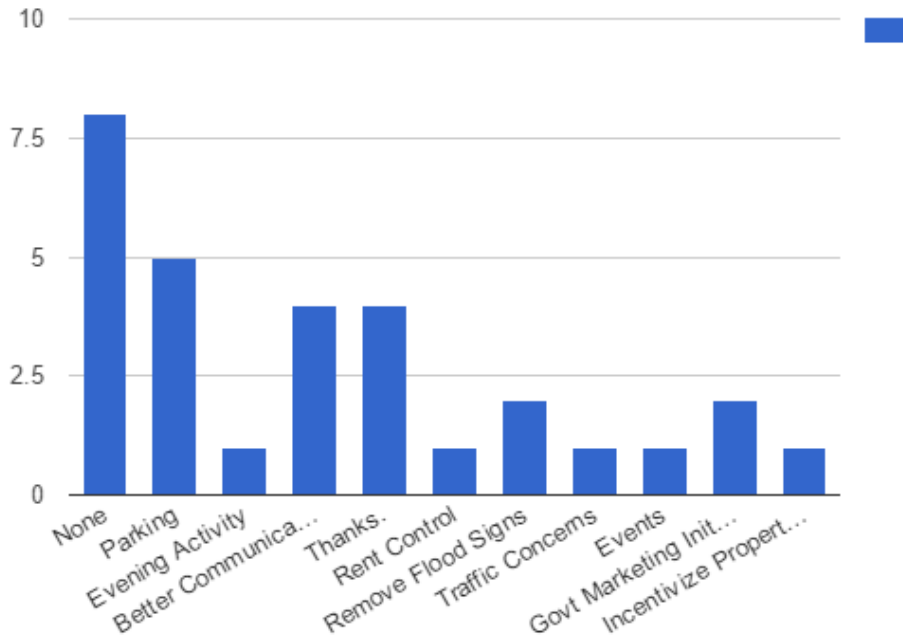


Business location unknown: How do the existing community events affect your business? (i.e., foot traffic, sales volume)



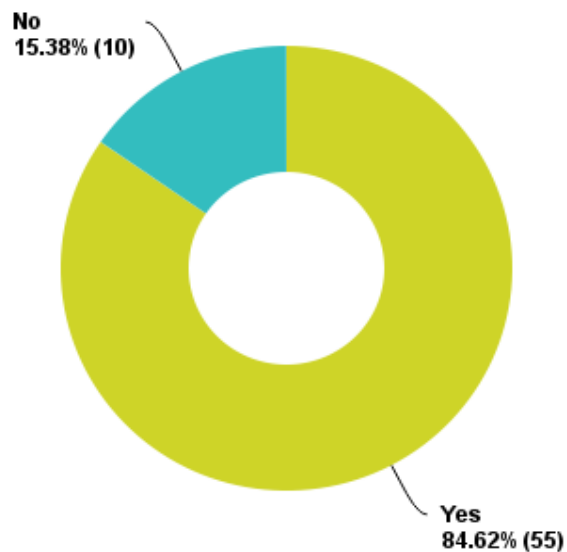
Q29

Do you have additional questions, comments or suggestions for the Economic Development Committee?



Q30 Would you like to receive the results of this survey once it's completed?

Answered: 65 Skipped: 20



San Anselmo Business Outlook Survey 2016 – Summary Suggested Questions from Merchants for Consumer Survey

Demographic Questions

1. Families with kids under 12
2. Families with kids 12-18" and
3. Families under 45 without kids
4. Families 45 with no kids in the house

Location

1. Downtown (provide boundaries)
2. Sleepy Hollow
3. Additional Neighborhood

If you have children attending schools in Ross Valley, where do they attend?

1. Wade Thomas
2. Brookside
3. Hidden Valley
4. MAPS
5. St. Anselm
6. San Anselmo Montessori School
7. San Domenico
8. White Hill Middle School
9. Drake High School
10. Other - Please list

Type of Restaurants People Would Like to See (ranked)

1. Iron Springs / Bubba's
2. Sports Bar (redundant with number one?)
3. Deli
4. Taqueria
5. Pizza
6. Chinese
7. Greek
8. Ethiopian
9. Vegan
10. French Bistro

What do you think is an appropriate price point for a meal for 4 (two adults and two children)
[Provide range]

What do you think is an appropriate price point for a meal for 2 adults
[Provide range]

Is there sufficient bike parking in town?

Would you support San Anselmo Ave being one lane thru town?

Would you use downtown more if there was no cars on San Anselmo Ave?

Should the Town Council explore avenues to encourage property owners to rent vacant properties after a certain amount of town or make external improvements

What type of establishments would you like to see offered in SA that are not currently present?

Is parking an issue for you? How often? Suggestions on improvement (provide ranked solutions)
What is the biggest factor preventing you from shopping, eating or visiting San Anselmo?
Would you support occasional San Anselmo Ave. street closure to cars to open it up for pedestrians roam
yes, would you like once weekly? bi-weekly, monthly?

Whats kinds of services/ shops would you like to see in San Anselmo that you feel the community can support

What is your percentage of non-food and transportation spending per month

1. Retail establishments in San Anselmo
2. Retail establishments with Marin County (non big-box)
3. Big Box establishments within Marin County (
4. Internet

How often you shop at big box stores in Marin County [define]

Where types of store and or activities would encourage you (and/or your family) to got out in the evenings in San Anselmo
[Provide Ranked choices]

Do you attend the Art & Wine Festival [provide context and ranked feedback?]

Do you attend Country Day Fair [provide context and ranked feedback?]

Do you attend Picnics on the Plaz [provide context and ranked feedback?]

Question about Events.

Questions about frequency of using services/shopping in the various business districts