

2009 Stanislaus Economic Survey Responses by Sector

	Ag	Constr'n	Fin & Ins	Food Process'g	Health Care	Info	Mfg	Real Estate	Retail	Services	Tech	Transport Logistics	Other	All
Responses	13	18	11	8	8	3	19	11	9	55	3	3	13	174
2009 Revenue Expectation														
Increase	7.7%	5.6%	54.5%	37.5%	25.0%	0.0%	21.1%	9.1%	0.0%	20.0%	66.7%	0.0%	23.1%	19.5%
Remain about the same	15.4%	27.8%	27.3%	25.0%	37.5%	33.3%	31.6%	9.1%	33.3%	36.4%	33.3%	66.7%	7.7%	28.7%
Decrease	76.9%	66.7%	18.2%	37.5%	37.5%	66.7%	47.4%	72.7%	66.7%	40.0%	0.0%	33.3%	69.2%	50.0%
Average Expected	-19.5%	-18.3%	3.4%	-4.0%	-5.0%	-9.0%	-6.0%	-10.8%	-10.0%	-10.4%	10.0%	-6.7%	-2.7%	-8.8%
2009 Workforce Expectation														
Increase	7.7%	0.0%	27.3%	12.5%	25.0%	0.0%	10.5%	9.1%	0.0%	16.4%	66.7%	0.0%	15.4%	13.2%
Remain about the same	53.8%	61.1%	63.6%	75.0%	37.5%	66.7%	42.1%	63.6%	66.7%	65.5%	33.3%	33.3%	38.5%	57.5%
Decrease	38.5%	38.9%	9.1%	12.5%	37.5%	33.3%	42.1%	18.2%	33.3%	18.2%	0.0%	33.3%	38.5%	27.0%
Average Expected	-6.8%	-10.0%	-0.4%	0.1%	-1.3%	-3.3%	-7.2%	1.1%	-3.3%	-2.1%	5.0%	-10.0%	-1.4%	-3.3%
2009 Profitability Expectation														
Increase	15.4%	5.6%	36.4%	25.0%	25.0%	0.0%	15.8%	9.1%	11.1%	18.2%	66.7%	0.0%	15.4%	17.2%
Remain about the same	7.7%	11.1%	36.4%	37.5%	37.5%	0.0%	42.1%	36.4%	22.2%	41.8%	33.3%	33.3%	23.1%	31.6%
Decrease	76.9%	83.3%	27.3%	37.5%	25.0%	100.0%	36.8%	54.5%	66.7%	40.0%	0.0%	66.7%	53.8%	49.4%
Average Expected	-30.6%	-26.8%	-5.0%	-3.8%	-2.5%	-30.0%	-13.0%	-5.6%	-30.7%	-5.0%	5.0%	-10.0%	-1.7%	-12.0%
Factors impacting profitability and growth														
Competition	7.7%	50.0%	9.1%	12.5%	25.0%	33.3%	15.8%	0.0%	11.1%	20.0%	0.0%	33.3%	15.4%	19.0%
Energy Costs	23.1%	5.6%	0.0%	12.5%	0.0%	0.0%	21.1%	9.1%	22.2%	7.3%	33.3%	66.7%	0.0%	10.9%
Financing	0.0%	22.2%	18.2%	25.0%	12.5%	0.0%	21.1%	54.5%	11.1%	18.2%	66.7%	0.0%	0.0%	18.4%
Insurance	15.4%	11.1%	0.0%	25.0%	12.5%	0.0%	21.1%	0.0%	11.1%	20.0%	33.3%	0.0%	0.0%	13.8%
Labor Costs	0.0%	22.2%	0.0%	12.5%	25.0%	0.0%	21.1%	0.0%	0.0%	10.9%	33.3%	0.0%	7.7%	10.9%
Regulations	30.8%	38.9%	9.1%	37.5%	37.5%	0.0%	21.1%	45.5%	0.0%	23.6%	33.3%	33.3%	15.4%	25.3%
Road Issues	0.0%	0.0%	0.0%	0.0%	12.5%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	33.3%	0.0%	1.7%
Taxes/Fees	15.4%	38.9%	9.1%	37.5%	0.0%	0.0%	36.8%	27.3%	33.3%	34.5%	33.3%	33.3%	15.4%	28.2%
The Economy	61.5%	83.3%	90.9%	75.0%	62.5%	100.0%	73.7%	90.9%	100.0%	80.0%	33.3%	66.7%	69.2%	78.2%
Workers' Comp	7.7%	38.9%	0.0%	12.5%	12.5%	0.0%	5.3%	0.0%	0.0%	21.8%	33.3%	33.3%	7.7%	14.9%
Workforce Issues	0.0%	11.1%	0.0%	12.5%	0.0%	0.0%	0.0%	9.1%	0.0%	7.3%	33.3%	0.0%	7.7%	5.7%
Other	15.4%	0.0%	9.1%	0.0%	0.0%	33.3%	10.5%	18.2%	11.1%	16.4%	0.0%	0.0%	15.4%	11.5%

	Ag	Constr'n	Fin & Ins	Food Process'g	Health Care	Info	Mfg	Real Estate	Retail	Services	Tech	Transport Logistics	Other	All
Do you have job openings that you can't fill?														
Yes	7.7%	11.1%	9.1%	12.5%	25.0%	33.3%	5.3%	9.1%	0.0%	10.9%	33.3%	0.0%	23.1%	11.5%
No	92.3%	88.9%	90.9%	75.0%	75.0%	66.7%	94.7%	90.9%	88.9%	85.5%	66.7%	100.0%	76.9%	86.2%
Internet usage														
Website	61.5%	77.8%	100.0%	87.5%	87.5%	100.0%	100.0%	90.9%	100.0%	83.6%	100.0%	66.7%	92.3%	86.8%
E-commerce	15.4%	16.7%	45.5%	37.5%	12.5%	33.3%	36.8%	36.4%	55.6%	36.4%	66.7%	66.7%	61.5%	36.2%
Buys online advertising	0.0%	5.6%	18.2%	25.0%	12.5%	0.0%	10.5%	18.2%	33.3%	25.5%	33.3%	33.3%	38.5%	19.5%
Uses social media	0.0%	5.6%	36.4%	0.0%	37.5%	66.7%	10.5%	18.2%	22.2%	27.3%	66.7%	33.3%	38.5%	22.4%
Not online - wants site	0.0%	5.6%	0.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%	3.4%
Not online - no plans	7.7%	0.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Other	0.0%	11.1%	0.0%	12.5%	0.0%	33.3%	0.0%	9.1%	0.0%	7.3%	0.0%	33.3%	15.4%	6.9%
Quarter US recovery to start														
June '09	7.7%	5.6%	0.0%	0.0%	0.0%	0.0%	21.1%	9.1%	0.0%	3.6%	0.0%	0.0%	23.1%	6.9%
Sept '09	7.7%	11.1%	36.4%	0.0%	0.0%	0.0%	10.5%	9.1%	11.1%	16.4%	0.0%	0.0%	15.4%	12.6%
Dec '09	7.7%	11.1%	27.3%	25.0%	12.5%	0.0%	15.8%	18.2%	22.2%	14.5%	33.3%	33.3%	15.4%	16.1%
March '10	7.7%	44.4%	18.2%	25.0%	12.5%	66.7%	26.3%	18.2%	33.3%	27.3%	0.0%	33.3%	15.4%	25.3%
June '10	23.1%	11.1%	18.2%	0.0%	62.5%	33.3%	5.3%	27.3%	11.1%	5.5%	0.0%	0.0%	0.0%	12.1%
Later than June 2010	46.2%	16.7%	0.0%	37.5%	12.5%	0.0%	21.1%	9.1%	11.1%	30.9%	66.7%	33.3%	30.8%	24.7%
Quarter California recovery to start														
June '09	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	5.5%	0.0%	0.0%	7.7%	4.0%
Sept '09	7.7%	5.6%	36.4%	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	5.5%	0.0%	33.3%	7.7%	7.5%
Dec '09	7.7%	5.6%	0.0%	25.0%	12.5%	33.3%	10.5%	18.2%	22.2%	10.9%	0.0%	0.0%	38.5%	13.2%
March '10	15.4%	33.3%	18.2%	25.0%	25.0%	0.0%	36.8%	27.3%	11.1%	20.0%	33.3%	0.0%	7.7%	21.8%
June '10	15.4%	22.2%	36.4%	0.0%	25.0%	0.0%	10.5%	18.2%	11.1%	14.5%	0.0%	0.0%	0.0%	14.4%
Later than June 2010	53.8%	27.8%	0.0%	37.5%	25.0%	33.3%	21.1%	27.3%	44.4%	34.5%	66.7%	66.7%	38.5%	32.8%
Quarter Stanislaus recovery to start														
June '09	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	7.3%	0.0%	0.0%	7.7%	4.6%
Sept '09	7.7%	5.6%	18.2%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	5.5%	0.0%	0.0%	7.7%	5.2%
Dec '09	7.7%	5.6%	18.2%	12.5%	0.0%	0.0%	5.3%	0.0%	11.1%	7.3%	0.0%	0.0%	23.1%	8.0%
March '10	0.0%	22.2%	9.1%	12.5%	25.0%	33.3%	31.6%	0.0%	11.1%	12.7%	33.3%	0.0%	15.4%	14.9%
June '10	23.1%	11.1%	18.2%	12.5%	12.5%	0.0%	21.1%	45.5%	22.2%	16.4%	0.0%	33.3%	7.7%	17.8%
Later than June 2010	61.5%	50.0%	27.3%	37.5%	50.0%	0.0%	31.6%	18.2%	44.4%	41.8%	66.7%	66.7%	38.5%	40.8%

	Ag	Constr'n	Fin & Ins	Food Process'g	Health Care	Info	Mfg	Real Estate	Retail	Services	Tech	Transport Logistics	Other	All
Alliance services utilized														
Enterprise Zone	23.1%	33.3%	18.2%	25.0%	0.0%	33.3%	52.6%	36.4%	33.3%	23.6%	33.3%	33.3%	23.1%	28.2%
Business Workshops	7.7%	22.2%	63.6%	12.5%	37.5%	0.0%	31.6%	45.5%	44.4%	36.4%	33.3%	0.0%	46.2%	33.3%
Small Business Dev't Ctr	7.7%	16.7%	0.0%	12.5%	12.5%	0.0%	26.3%	18.2%	11.1%	25.5%	0.0%	0.0%	15.4%	17.2%
Business Resource Ctr	7.7%	0.0%	9.1%	12.5%	12.5%	0.0%	0.0%	27.3%	22.2%	12.7%	0.0%	0.0%	15.4%	10.3%
Business Assistance	0.0%	5.6%	0.0%	0.0%	12.5%	0.0%	10.5%	9.1%	0.0%	12.7%	0.0%	0.0%	0.0%	6.9%
WorkKeys	7.7%	0.0%	0.0%	12.5%	0.0%	0.0%	21.1%	0.0%	11.1%	5.5%	0.0%	0.0%	15.4%	6.9%
Recruitment Assistance	7.7%	5.6%	0.0%	50.0%	25.0%	33.3%	42.1%	18.2%	11.1%	12.7%	0.0%	33.3%	23.1%	17.8%
Education Department	0.0%	5.6%	9.1%	12.5%	12.5%	0.0%	10.5%	9.1%	0.0%	0.0%	0.0%	0.0%	15.4%	5.2%
Other	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
None	46.2%	50.0%	9.1%	25.0%	50.0%	0.0%	10.5%	18.2%	0.0%	34.5%	33.3%	33.3%	23.1%	28.7%