



CITY OF HOLDFAST BAY
BUSINESS ENGAGEMENT SURVEY
FINAL REPORT
DATED 14 APRIL 2015
PREPARED BY INTUITO PTY LTD

intuⁱto
market research

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1. INTRODUCTION

Intuito is pleased to provide this final report to the City of Holdfast Bay for market research amongst businesses located in the Council area to measure business confidence and how Council can help develop better business conditions. This survey proved to be quite difficult to recruit. Our methodology needed to change during the fieldwork phase from telephone to a combination of telephone and gathering email addresses, emailing an online link (to in excess of 500 businesses) with a very small pull through rate to face to face interviews in the Glenelg and Brighton area. 208 surveys were completed in entirety, however an additional 73 respondents started the survey and did not complete.

One of the key deliverables for this project was to measure business confidence that is compatible with the Australian Chamber of Commerce and Industry (ACCI) Business Confidence Survey and can be benchmarked against the national survey. This survey asked people therefore to look back to the last quarter (December 2014) and compare confidence on a variety of measures to the first quarter this year (2015). Distribution of the ACCI survey for the December quarter released in April has enabled us to compare the last quarter results on a national level, and local first quarter results against the national expected results.



2. THE BRIEF AND SITUATION ANALYSIS

Background to the brief

The City of Holdfast Bay has conducted an annual survey of residents entitled 'Quality of Life' for the past 4 years. Its primary purpose is to measure the quality and level of satisfaction with Council's services and to provide community input into Council's Annual Business Plan and Budget process. This year it was decided to include businesses.

There are four strategic key result areas that relate to service and program delivery and these include building a strong community; creating a sustainable environment; delivering economic prosperity; and enhancing city design. And a fifth key result area in 2015 is to survey businesses to ascertain current and forecast levels of business confidence and opinions on how Council can help support business conditions.

Project Scope

The 2015 research project should measure residents' level of satisfaction with, and perception of the quality of services that the Council delivers and also confidence levels amongst businesses in the area. The key deliverables include:

- Develop and conduct Community Survey to achieve Council's objectives.
- Refine the survey questionnaire for the Community.
- Develop a refined business questionnaire that is compatible with the Australian Chamber of Commerce and Industry Business Confidence Survey.
- Conduct a survey, achieving a minimum of 400 ratepayer respondents ensuring the sample is balanced to reflect the community profile and 200 business respondents (business types at random).
- Collate all data and provide both a quantitative and qualitative report on the findings to Council, including the outcomes of the Business Survey.
- Manage any complaints received during the delivery of the survey and report same to Council along with actions taken to rectify issues.
- Present an overview of the report to the Senior Leadership Team and to Council (if needed).



3. MARKET RESEARCH OBJECTIVES

Specific objectives for the Business Survey include:

- Ascertain current and forecast levels of business confidence.
- Seek opinions on how the City of Holdfast Bay can develop strategies that will support business conditions.



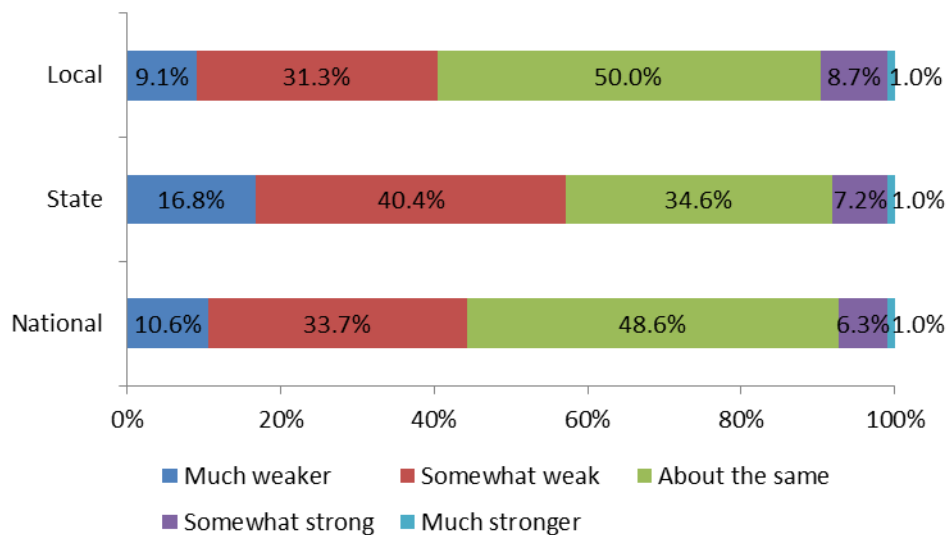
4. EXECUTIVE SUMMARY

Profile of businesses in the City of Holdfast Bay

Businesses in the City of Holdfast Bay appear to be skewed significantly toward retail and hospitality/restaurants compared to the national average particularly given the random nature of the selection of these respondents for this survey. Nearly a third are retail, followed by 16% hospitality, 9% are health services, 8% building, real estate and development, 7% personal services, 4% consulting and business services, 3% tourism, 3% banking and finance and the remaining 15.5% are in 'other' sectors. The vast majority (96%) can be classified as small business (0-19 employees), 3% medium businesses (20-99 employees) and .5% (one business with 100+ employees).

Length of business operation across all businesses is an average of 20 years with 27% operating in the area for 0-5 years, 40% for 6-20 years and 33% for over 20 years. The vast majority of businesses operate out of a physical office or shop, 9% work from home and 4% are mobile. Each business has an average of 5 full time employees and 7 part time employees. There are more females than males at a ratio of 3:2, there are more skilled workers to unskilled workers at a ratio of 3.5:1 and there are more part time employees with a ratio of 2:1 against full time employees.

Expectations on performance of the economy



The State economy outlook is significantly poorer than that of the national or local economy expectations.



Business indicators for local businesses compared to the National ACCI Index

KPI	Local Index Dec 2014	Local Index Mar 2015	Quarterly Move	Nat Index Dec 2014	Nat Index Mar 2015 (e)	Against Nat Index
General business conditions	42.0	44.2	↑	45.7	48.6	↑
Sales revenue	43.8	45.7	↑	45.5	52.6	↑
Wage growth	62.3	55.9	↓	54.9	53.1	↓
Non-wage labour costs (super, payroll tax, etc.)	68.6	60.9	↓	54.2	53.2	↓
Selling prices	53.6	54.9	↑	45.5	47.7	↑
Profit growth	36.7	41.6	↑	39.1	45.1	↑
Number of employees	45.4	47.1	↑	46.9	47.9	↑
Overtime utilisation	44.8	44.5	↓	42.0	41.0	↓
Investment in buildings and structures	43.2	44.8	↑	45.6	40.4	↓
Investment in plant and equipment	49.3	47.8	↓	47.3	46.0	↓

This Small Business Survey shows that small business in Holdfast Bay are experiencing painful trading conditions in the December quarter and even greater than the painful conditions experienced by National Small Businesses according to the Australian Chamber of Commerce and Industry December, 2014 report. With the exception of wages growth, non-wage labour costs and selling prices all current business indicators recorded readings in contractionary territory. On the upside, the indicators that are improving and heading toward neutral readings are general business conditions, sales revenue, profit growth (although this has a long way to get to neutral) and investment in plant and equipment.

Small Business Conditions

Small Business Conditions expect to improve slightly from the December quarter to the March quarter although both indices are lower than the national averages.

Sales revenue

The Sales Revenue index increased slightly from the December quarter to the March quarter. The March quarter for local business is now sitting where the national index was in December, 2014 but well below the estimated March National Index of a positive 52.6.

Wage growth

The Wages index for local businesses is set to improve from the December quarter to the March quarter. Given the nature of businesses in Holdfast Bay and the longer than usual Christmas shopping hours, public holidays, etc. this will improve in the current quarter. The local wages index is now in line with the estimated National ACCI March index.



Non-wage labour costs

This index for non-wage labour costs was very high in the December quarter (possibly because of greater wage costs over Christmas) but is easing in the March quarter. Both quarters are significantly higher than the National tracking indices.

Selling prices

Selling Prices indices in the December quarter and March quarter were significantly higher than the National ACCI December and March indices and are in positive territory indicating that selling prices are holding in the local Holdfast Bay area.

Profit growth

This index remains depressed with a reading just above 40 in the March quarter (up from 36.7 in the December quarter). This mirrors the slight improvements in the National ACCI indices but the local figures are worse than the National ACCI index for both quarters.

Number of employees

This index has improved slightly over the last quarter but it still remains below neutral and is in line with the National ACCI indices for both quarters.

Overtime utilization

The Overtime Utilisation indices remain flat but the local businesses are faring better than National small business but all indices are below neutral.

Investment in buildings and structures

The Investment in Buildings and Structures index has also remained flat for local business (both sitting below neutral) however is now faring better than the estimated National ACCI Index for March which will be around 40 which is expected to fall sharply over the last two quarters.

Investment in plant and equipment

This index has fallen slightly from the December quarter (which was neutral) down to 47.8 in the March quarter but the estimated National ACCI Index shows small business nationally to fare slightly worse.

Constraints on investment in plant and equipment

Business taxes and government charges are the number one constraint on small business investment. This is followed by wage costs (peculiar to local businesses in Holdfast Bay) followed by State Government regulations and insufficient retained earnings. The number one constraint is consistent with the National ACCI Small Business Survey but does not follow other constraints such as insufficient demand, import competition, and non-wage labour costs.

Ideas and suggestions for future City of Holdfast Bay strategies

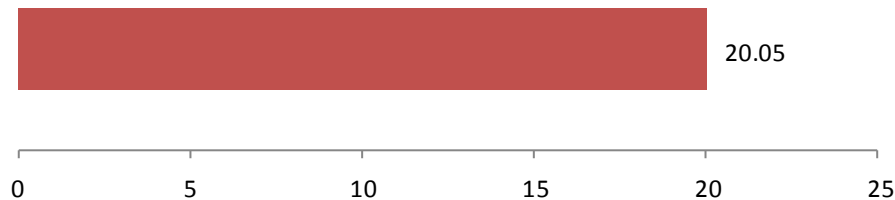
Most businesses offered some suggestions and the majority of these related to easier/better/more accessible parking and less vigilant parking inspectors and more events to bring more traffic to the area. There were a few businesses that suggested more bin collections or better signage in the area.



5. KEY FINDINGS

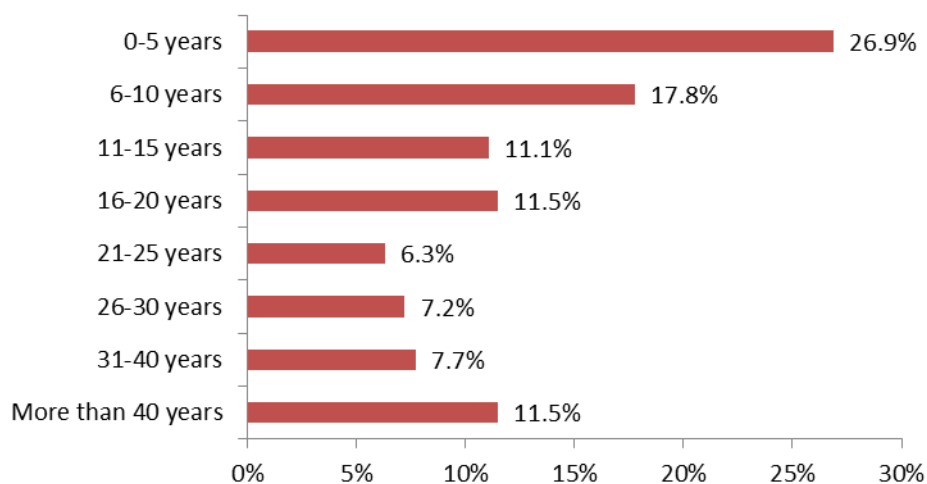
1. How long has your business operated in the City of Holdfast Bay Council area?

Average number of business operation years n=208



Businesses were asked how long they had operated their business in the City of Holdfast Bay Council area in whole numbers. 208 businesses responded to this question in the survey and the average number of years across the sum of 4,170 total years was 20. The maximum was 150 years and the minimum was 0 years. The median was 14.5.

Number of years operating=208

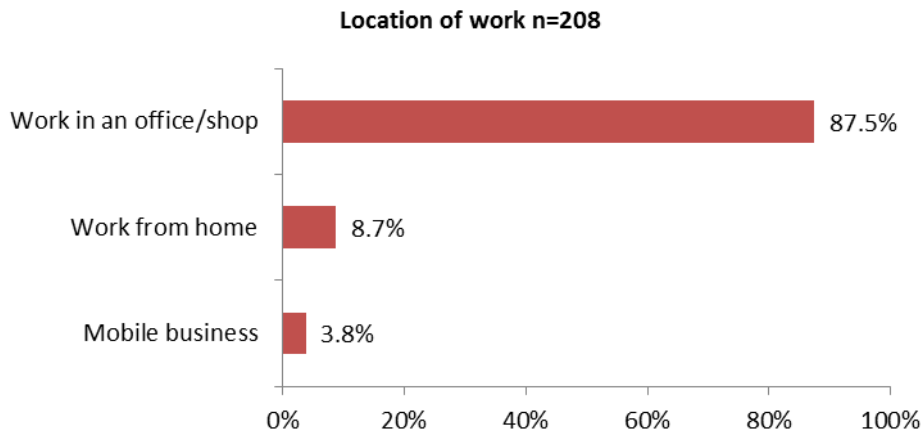


Clustering years of operation reveals that just over a quarter (27%) of businesses have been operating in the area for between 0 and 5 years, with 40% for between 6 and 20 years, and a third (33%) for over 20 years.

Medium sized firms (with employees of between 20 and 99 FTEs) are more likely to have been in operation for between 16 and 30 years (16-20 years 25%, 21-30 years 12.5%) and more than 40 years and the one large firm represented, in operation for more than 40 years (150 years to be precise).



2. Which of the following describes your business?



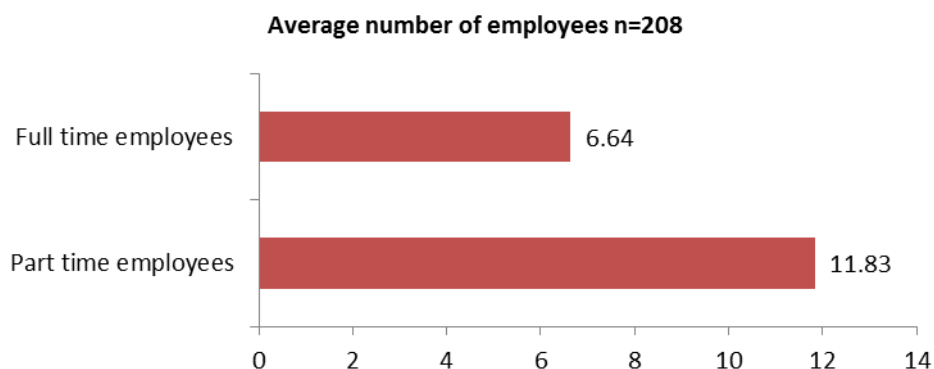
All respondents were asked to describe their business location from a list provided, whether a bricks and mortar shop or office, work out of home or conduct a mobile business. The majority of respondents indicated that their work is located in an office/shop (87.5%), with those working from home representing 9% and mobile business 4%.

Businesses more likely to be located in an office/shop were retail, hospitality/restaurants, tourism, food and beverage distribution, manufacturing, education, arts, creative industry, not for profit and transport.

Businesses more likely to be working from home were building, real estate and development, personal services, consulting and business services, technology and communications and mining and exploration.

Mobile businesses were more likely to fall into building, real estate and development, other businesses, banking and finance categories.

3. How many full time and part time employees does your business employ?

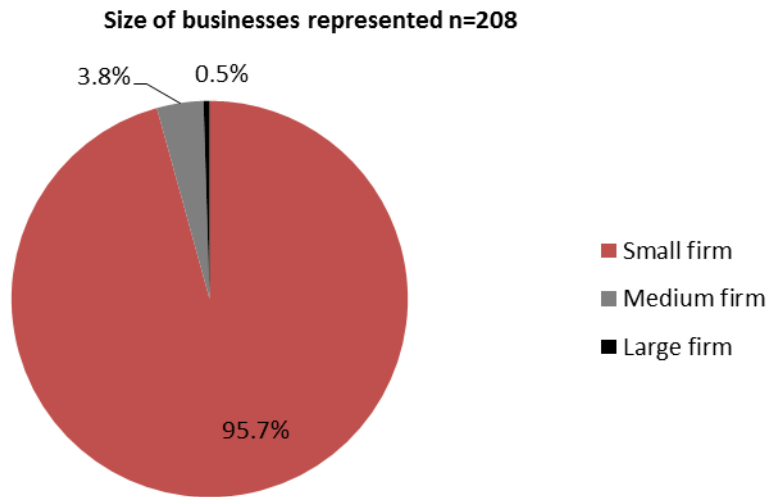


The average number of full time employees across all businesses surveyed is 7 (6.64) per business (based on 1242 FTEs divided by 187 businesses) and the average number of part time employees is 12 (11.83) (based on 1786 PTEs divided by 151 businesses).

Removing the major employer outlier (396 FTE's and 707 PTE's) reveals that the average number of full time employees is 5 (4.5) per business (based on 846 FTEs divided by 186 businesses) and the average number of part time employees is 7 (7.19) per business (based on 1079 PTEs divided by 156 businesses).



Further analysis of number of employees enabled the creation of a size of business variable in attempt to align with the ACCI Small Business Survey. Namely, those employing between 0 and 19 FTEs are classified as small business, those employing between 20 and 99 are medium, and those employing 100 or more, large. However, as the majority of businesses surveyed were small business (96%), analysis by size of business reveals the remaining samples to be too small. Therefore all comparisons will be made using the total sample of businesses surveyed.



Businesses located out of home or mobile are more likely to be classified as small businesses.

Small businesses are more likely to be health services, other, personal services, banking and finance, tourism, food and beverage distribution, technology and communications, education, arts and creative industry and transport businesses.

Medium businesses are more likely to be consulting and business services, manufacturing and mining and exploration.

The large firm fell into the not for profit sector.



4. What ratio of each of the following do you employ on a full time basis to the nearest 10 percent?



All respondents were asked to provide the ratio of employees to the nearest 10% by gender, skilled/unskilled and full versus part time employees.

Gender

More females are employed within the City of Holdfast Bay area with female employees outnumbering males at a ratio of 3:2.

Skilled/Unskilled

There are more skilled employees working within the City of Holdfast Bay area with the skilled workforce outnumbering unskilled workforce at a ratio of 3.5:1.

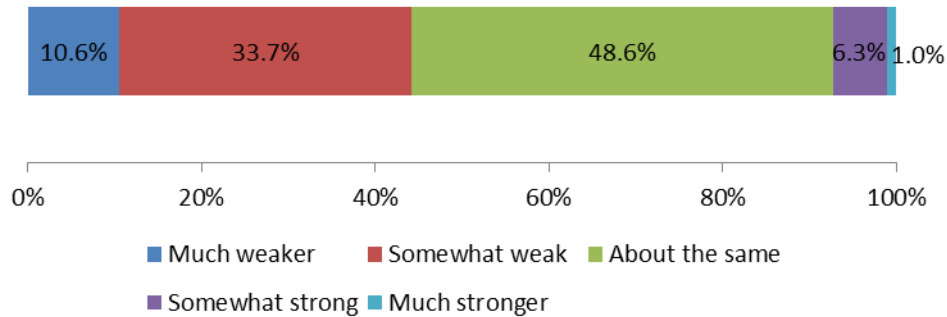
Full time/Part time Employees

This question has been compromised in that businesses seemed to be unable to put a percentage on FTE's and PTE's. If we take the data from Q3 this shows a ratio of 2:1 part time employees to full time employees and this makes sense given the nature of retail and hospitality (i.e. having more part time employees).



5. How do you expect the national economy to perform over the next 12 months?

National economy expectations n=208



Half (49%) of the respondents expect the national economy to perform about the same over the next 12 months and 34% expects performance to be somewhat weaker, 11% much weaker, 6% somewhat stronger and only 1% much stronger.

Businesses with expectations that the national economy will perform about the same over the next 12 months are more likely to fall into the building, real estate and development, other and manufacturing sectors.

Businesses with an expectation that the national economy will perform somewhat weaker over the next 12 months are more likely to be in the hospitality/restaurants, health services and personal services, consulting and business services and tourism sectors.

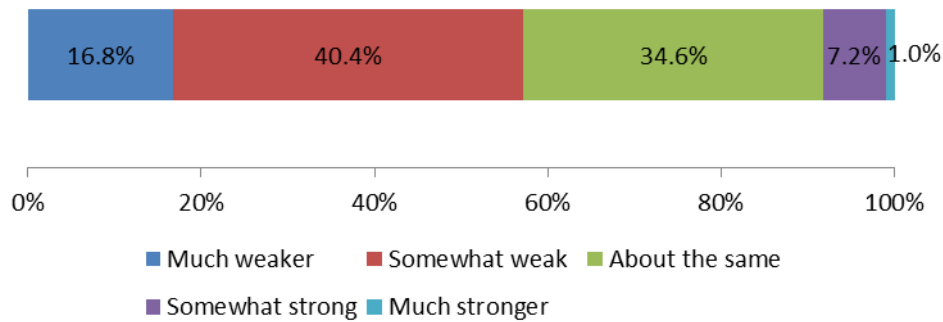
Businesses with an expectation that the national economy will perform much weaker over the next 12 months fall into the retail, consulting and business services sectors.

Businesses with expectations that the national economy will perform somewhat stronger over the next 12 months fall into the retail sector.



6. How do you expect the South Australian economy to perform over the next 12 months?

South Australian economy expectations n=208



The outlook for the SA economy is significantly worse than the national outlook.

Around a third (35%) of all businesses expect the South Australian economy to perform about the same over the next 12 months and 40% expects performance to be somewhat weaker, 17% much weaker, 7% somewhat stronger and only 1% much stronger.

Businesses with expectations that the South Australian economy will perform about the same over the next 12 months are more likely to fall into the building, real estate and development, other, personal services, retail and manufacturing sectors.

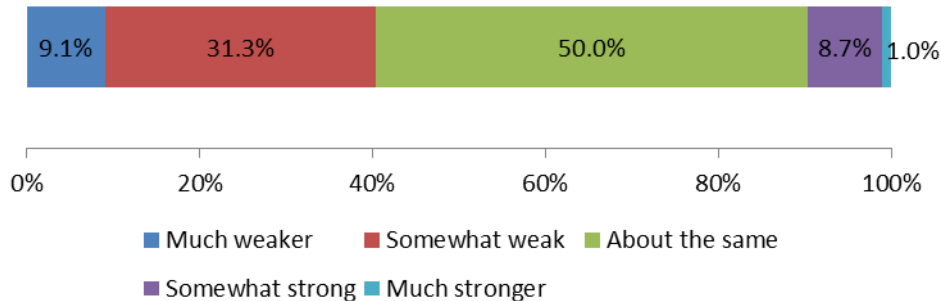
Businesses with an expectation that the South Australian economy will perform somewhat weaker over the next 12 months are more likely to be in the hospitality/restaurants, other, banking and finance, food and beverage distribution, technology and communications and education sectors.

Businesses with an expectation that the South Australian economy will perform much weaker over the next 12 months fall into the hospitality/restaurant, health services, personal services, and consulting and business services sectors.



7. How do you expect the local City of Holdfast Bay area economy to perform over the next 12 months?

Local area economy expectations n=208



The outlook for the local economy of the City of Holdfast Bay is in line with the national outlook and is better than the State outlook.

When asked about the performance of the local City of Holdfast Bay economy, 50% of all businesses expect the Holdfast Bay area economy to perform about the same over the next 12 months and 31% expect performance to be somewhat weaker, 9% much weaker, 9% somewhat stronger and only 1% much stronger.

Businesses with expectations that the local City of Holdfast Bay area economy will perform about the same over the next 12 months are more likely to fall into the health services, building, real estate and development, other, personal services, consulting and business services and manufacturing sectors.

Businesses with an expectation that the local City of Holdfast Bay area economy will perform somewhat weaker over the next 12 months are more likely to fall in the hospitality/restaurants, tourism and food and beverage distribution sectors.

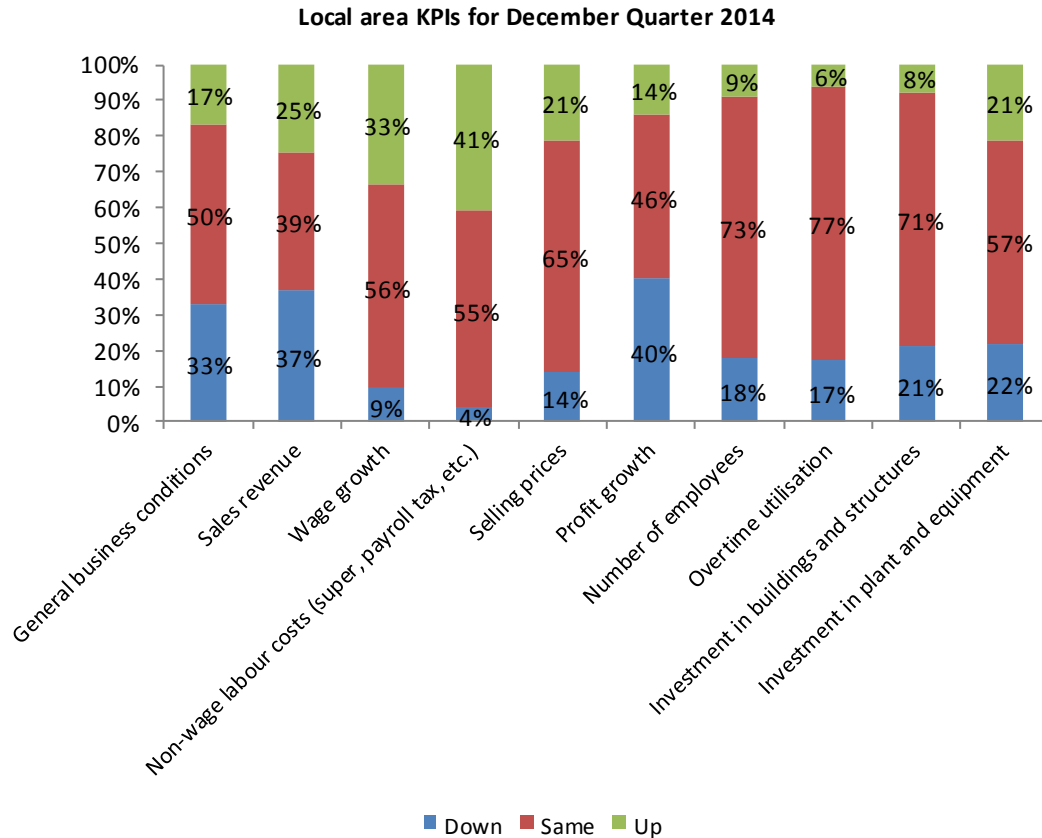
Businesses with an expectation that the local City of Holdfast Bay area economy will perform much weaker over the next 12 months fall into the retail and health services sectors.

Interestingly, retail businesses were also likely to acknowledge that the local City of Holdfast Bay area economy will perform somewhat stronger in the next 12 months, along with business in the 'other' category.



8. How would you describe the following business KPIs in the last quarter of 2014? Were they up, down or about the same as the previous quarter?

As the total sample mostly comprises small business (96%) the following KPIs have been calculated on the total sample of 208 businesses rather than by size of business.



The following is a summary of the statistics based on all responses:

KPI	Up	Same	Down	Local Index Dec 2014
General business conditions	17%	50%	33%	42.0
Sales revenue	24.5%	38.5%	37%	43.8
Wage growth	33%	56%	9%	62.3
Non-wage labour costs (super, payroll tax, etc.)	41%	55%	4%	68.6
Selling prices	21%	65%	14%	53.6
Profit growth	14%	46%	40%	36.7
Number of employees	9%	73%	18%	45.4
Overtime utilisation	6%	77%	17%	44.8
Investment in buildings and structures	7.5%	71%	21%	43.2
Investment in plant and equipment	21%	57%	22%	49.3

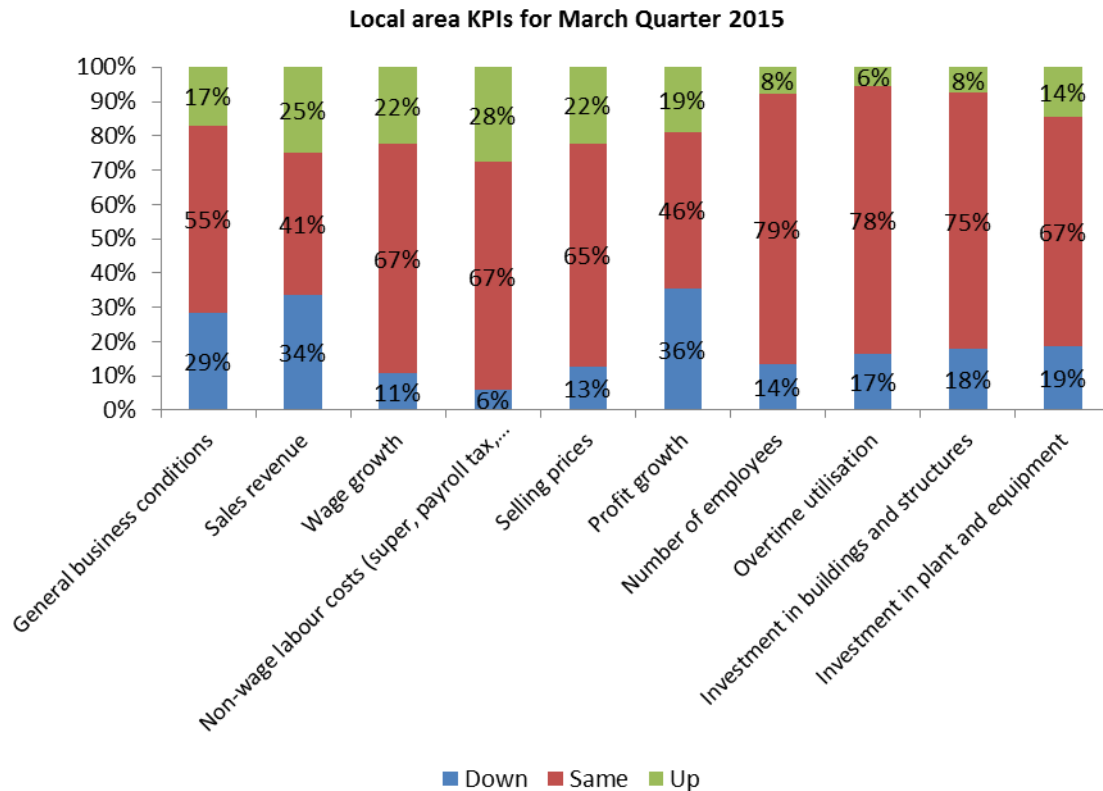
Based on the principals of indexation, the only positive index above is selling prices.



KPI	Local Index Dec 2014	Nat Index Dec 2014	Against Nat Index
General business conditions	42.0	45.7	↓
Sales revenue	43.8	45.5	↓
Wage growth	62.3	54.9	↑
Non-wage labour costs (super, payroll tax, etc.)	68.6	54.2	↑
Selling prices	53.6	45.5	↑
Profit growth	36.7	39.1	↓
Number of employees	45.4	46.9	↓
Overtime utilisation	44.8	42.0	↑
Investment in buildings and structures	43.2	45.6	↓
Investment in plant and equipment	49.3	47.3	↑



9. How do you expect the same business KPIs to perform in the current first quarter of 2015? Will they be up, down, or about the same as the previous quarter?



The following is a summary of the statistics:

KPI	Up	Same	Down	Local Index March 2015
General business conditions	17%	55%	28.5%	44.2
Sales revenue	25%	41%	34%	45.7
Wage growth	22%	67%	11%	55.9
Non-wage labour costs (super, payroll tax, etc.)	28%	66.5%	6%	60.9
Selling prices	22%	65%	13%	54.9
Profit growth	19%	46%	36%	41.6
Number of employees	8%	78.6%	14%	47.1
Overtime utilisation	5.5%	78%	17%	44.5
Investment in buildings and structures	7.5%	75%	18%	44.8
Investment in plant and equipment	14%	67%	19%	47.8



Businesses expect general business conditions to improve marginally this current quarter over last as well as sales revenue, non-wage labour costs, and profit growth but other than this conditions look like remaining fairly flat.

KPI	Local Index Mar 2015	Nat Index Mar 2015 (e)	Against Nat Index
General business conditions	44.2	48.6	↓
Sales revenue	45.7	52.6	↓
Wage growth	55.9	53.1	↑
Non-wage labour costs (super, payroll tax, etc.)	60.9	53.2	↑
Selling prices	54.9	47.7	↑
Profit growth	41.6	45.1	↓
Number of employees	47.1	47.9	↓
Overtime utilisation	44.5	41.0	↑
Investment in buildings and structures	44.8	40.4	↑
Investment in plant and equipment	47.8	46.0	↑

KPI	Local Index Dec 2014	Local Index Mar 2015	Quarterly Move	Nat Index Dec 2014	Nat Index Mar 2015 (e)	Against Nat Index
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Wage growth	62.3	55.9	↓	54.9	53.1	↓
Non-wage labour costs (super, payroll tax, etc.)	68.6	60.9	↓	54.2	53.2	↓
Selling prices	53.6	54.9	↑	45.5	47.7	↑
Profit growth	36.7	41.6	↑	39.1	45.1	↑
Number of employees	45.4	47.1	↑	46.9	47.9	↑
Overtime utilisation	44.8	44.5	↓	42.0	41.0	↓
Investment in buildings and structures	43.2	44.8	↑	45.6	40.4	↓
Investment in plant and equipment	49.3	47.8	↓	47.3	46.0	↓



General Business Conditions

Compared to the national index, general business conditions for the local area were lower with both the local and national indices in negative territory. Expectations for general business conditions both locally and nationally in the quarter ahead are optimistic but will remain negative.

Sales Revenue

Compared to the national index, sales revenue for the local area was lower in the December quarter with both the local and national indices in negative territory. Expectations for sales revenue locally in the quarter ahead are optimistic but will remain in negative.

Wage Growth

Compared to the national index, wages for the local area were higher. Locally business expects wages to decline in the next quarter, however will remain in positive territory.

Non-Wage Labour Costs

The index for non-wage labour costs sits above the national index with both remaining above the neutral 50 reading. Locally expectations for non-wage labour costs are anticipated to decline in the next quarter but remain in positive territory.

Selling Prices

The local index on selling prices sits well above the national average in positive territory compared to a negative national index. Locally, selling prices in the March quarter are expected to increase pushing slightly further into positive territory. Whilst the national index on selling prices is expected to increase in the next quarter, it will remain in negative.

Profit Growth

The local index on profit growth sits lower than the national average, both depressed with readings below 40. However, profits are expected to improve in the March quarter for both the local and national indices pushing results closer to neutral territory.

Number of Employees

The local Employment index sits slightly below the national employment index. Improvements are forecast both locally and nationally for the March quarter nudging closer to neutral territory.

Overtime Utilisation

The local overtime index is slightly above the national overtime index however whilst both indices are expected to fall in the March quarter, overtime utilisation will remain stronger on a local level.

Investment in Buildings and Structures

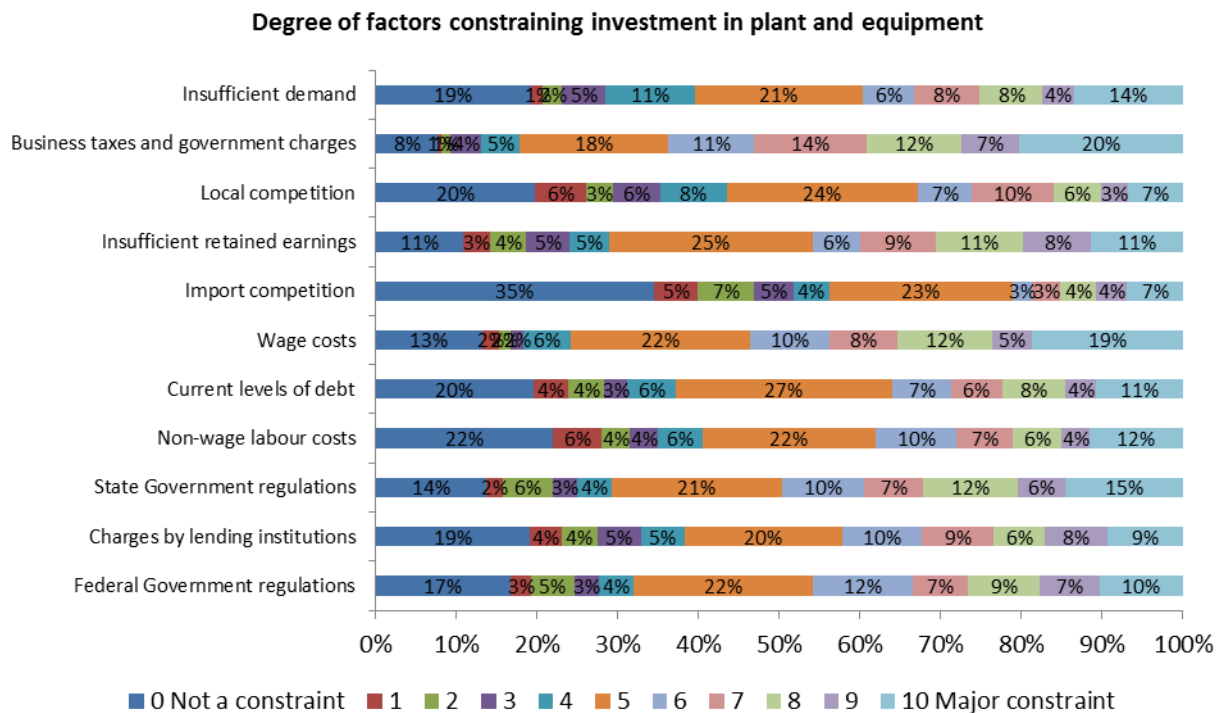
The local investment in building and structures index sits below the national index. However, whilst the index looks set to improve in the next quarter on a local level, forecasts for national are set to decline further.

Investment in Plant and Equipment

Compared to the national index, the local index for investment in plant and equipment is higher and sits just below positive territory on a local basis. However, the March quarter shows declines for both the local and national indices.



10. On a scale of zero to ten, how would you rate the degree to which each of the following factors constrain your investment in plant and equipment. Zero means that it is not a constraint at all to you and ten means it is a major constraint to you.



The major constraints on investment in plant and equipment are businesses taxes and government charges, insufficient retained earnings, wage costs and State Government regulations. The factor with the least impact is import competition to businesses in Holdfast Bay. Medium impact is seen for insufficient demand, local competition, current levels of debt, non-wage labour costs, and charges by lending institutions and Federal Government regulations.

The mean ratings for each aspect for all businesses are:

Factor	Mean score
Insufficient demand	5.98
Business taxes and government charges	7.48
Local competition	5.38
Insufficient retained earnings	6.50
Import competition	4.44
Wages costs	6.88
Current levels of debt	5.73
Non-wage labour costs	5.57
State Government regulations	6.51
Charges by lending institutions	5.84
Federal Government regulations	6.14



11. Do you have any suggestions or ideas on what strategies the City of Holdfast Bay can implement to support better business conditions for you?

147 people gave suggestions, ideas and comments and these can be summarised in the following word cloud:

Government_{Low} Small Business_{Far} Bins_{Pop}
 Development_{Larger} Jetty Rd_{Survey} Shops_{TOTAL}
 Council_{Bicycle Lane} Parking_{Cut} Street_{Dining}
 Jetty Road_{Loss} Local Businesses_{Proactive}
 Advertising_{Idea} Rid_{Tourists} Remove Bike Foot Traffic

There were eleven people who said they had no further comments to make. The main issues are seen as parking and suggestions include more events to bring more traffic to the area. The following are the remaining verbatim comments received:

None except more advertising.

No proposals are mentioned in this survey.

2 x bin collections per week. Longer parking down side-street (3-4 hours?).

Don't allow so many of the same businesses to open in a 5 km radius there is a hair and beauty salon on every street corner!

As a Jetty Rd Brighton trader I would like to see a traders association formed in conjunction with the council.

Placement of street signs at intersections indicating what businesses are in the street. Utilize local business for council needs.

More car parking.

Fix the car parking problem and with winter coming perhaps a few pop up businesses in some of the empty shops so the place doesn't look like it's deserted.

Fix the car parking problem it's disgusting.

Encourage people to come to Glenelg – need to bring more people down. Parking fines are really discouraging people from coming. Council should see business as “welcoming someone to their home”.



Also would be good to have parking available outside restaurants for elderly people. Many businesses come and go – council need to help new businesses get established. 35 years ago the area was a real community. It has lost this.

My only complaint would be that we don't have enough rubbish bins. It would be handy to have an extra one.

More car parking for both staff and clients.

Jetty Rd needs redevelopment – rental prices need to be looked at – trying to bring more events and the promotion of same to Glenelg and bring businesses together at a business forum twice a year.

Outdoor dining would help our industry along beachfront.

New footpath good but it would be good to be extended soon.

Free car parking – people can go to other surf clubs and park near them for no cost.

More support for business on Jetty Rd – need to make the area a shopping destination – fix car parking and more flexibility with parking inspectors with staff – more variety with retail shops.

Get to know their local businesses and become aware of their services and what's on offer and know what appeals to the community. I think when a community is aware that their council supports their local institutions, the public do too! Maybe using social media and talk about the council's favourite place in Brighton – for the week or month. Getting Facebook 'likes' brings awareness to areas/business/shop owners that the public hadn't noticed before. By getting to know business owners in your area, shows connectedness and I think that is appealing to a local community and helps bring people, business's together.

Better signage for tourists and more focus on helping businesses in the area.

Fix car parking problem in Glenelg – they should not have closed two car parks at the same time and they shouldn't do road works close to another lot of road works – it's made the area a mess – think of the businesses and give us support.

Increased local events, local advertising, improved street cleanliness and street appeal.

The word about Glenelg is 'don't bother going there, you won't find a park, or if you do, they're so hot on giving you a ticket you'll be fined for sure'. A positive spin on parking needs to be created, such as, 'we want your car with you, visiting Glenelg'. Maybe random car cleaning voucher prizes given out, or 'once you spend over \$? on the day, your parking space has no restrictions'. Even before the cinema disruptions, the feel at Glenelg is that shoppers parking their cars are the nuisance, and mere revenue raisers. Yes, the flow of parks available has to continue throughout the day, but somehow it has to be a welcoming, beneficial feel attached to it.



Council needs focus on tourism development by encouraging lower rents to attract more business to the Glenelg area.

Planning process has to be made easier and simpler any development is a significant impediment.

More festivals and events in the TOTAL HB area not just Glenelg centric thereby creating an atmosphere of positive-ness and life, then consumers spend helping business.

They should have constraints on the amount of the same businesses within a certain area. Competition is good for all businesses but an overload is ridiculous.

Compensate us for loss of business due to cinema construction and assist us to get better location within Glenelg.

Introduce zoning of the strip and actually follow through with it when business applies for change of use. Since the City of Holdfast Bay chooses to try to aim themselves at every target market possible. There should be a retail zone, a kid's zone, a nightlife dining zone. To put like-shops with like-shops. Putting water fountains that children play in in front of drinking establishments is a joke. Make owners maintain shop fronts. Having longer car park times available and possibly introducing permits for workers of the strip. It's hardly cost efficient for employers to have their staff required to move their cars every two hours.

Better parking facilities. Hold more events at Glenelg like Jazz Festival which we had many years ago and also Rock & Roll dancing etc.

Parking is a major concern since the closure of the Partridge St car park. Surely to redevelop the car park and utilise the cinema site would have been a far better option to avoid the parking situation we are all faced with for the next 12 months! I am receiving emails or phone calls daily from clients unable to find a park and after searching for ages, decide it is too hard and leave the Bay Area and head to Marion. Couple this with overzealous parking inspectors, and 1 hour limits, 2015 is heading to become a retailers worst nightmare!!! One can only wonder how many businesses will close once the full impact of this parking situation becomes clear.

Work on the mix of retailers the way Shopping Malls do with everything planned and executed to bring more people to the area.

They need to look after existing shops – not major projects that will the existing parking for over 6 months causing some to become unprofitable. They need to keep businesses informed instead of feeding them propaganda and misinformation

Improve parking conditions. You could have a council rate subsidy for businesses. I don't see it so much as a council issue. It is a property value/rent issue and the wrong people opening the wrong businesses.

A Jetty Rd "Super Saturday" where all retailers get involved in a big one day sale. Similar to what Westfield centres do to draw people to the area and compete with the shopping centres, particularly during the



winter months. Promoting Easter trading, Xmas trading and public holiday trading more. More street parties, events to increase foot traffic to the area.

Promoting benefits of local manufacturing industries.

The events that occur really constrain our business. The council rates are terribly high and don't help support our businesses. We lose business. While the building is happening near Jetty Road they should have free parking.

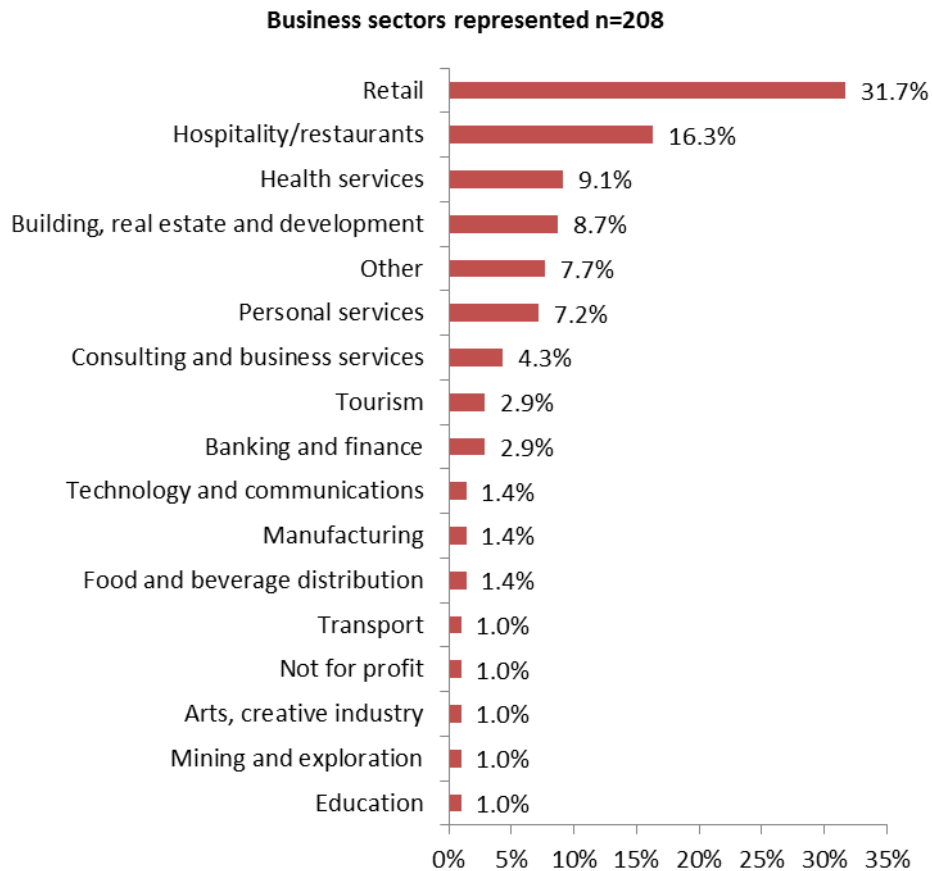
Free advertising.

More free car parking near foreshore for those going to beach.

Fix the car parking problem at Glenelg and do something with Jetty Rd it's a shambles.



12. What business sector do you fall into?



The only demographic collected as part of the survey was type of business. Around a third (32%) fell into the retail sector, followed by hospitality/restaurants (16%), health services (9%), building, real estate and development (9%), other (8%), personal services such as legal, medical etc (7%), consulting and business services (4%), tourism (3%), banking and finance (3%), and 1% for technology and communications, manufacturing, food and beverage distribution, transport, not for profit, arts, creative industry, mining and explorations and education sectors.

'Other' businesses comprised:

Pest Management, Crash repairer, Surf club, Beauty, Drink Catering & Mobile Bartending, Manufacturing and retail – creative industry, Distributor, Automotive repair, Hair and makeup, Beauty salon, Hairdressing Salon, Fitness, Retail Logistics, Quilting and embroidery services, Accountancy and Tax Practice.



6. TABULATIONS

Q1. How long has your business operated in the City of Holdfast Bay Council area?

Number of years	0-5 years	56
		26.9%
	6-10 years	37
		17.8%
	11-15 years	23
		11.1%
	16-20 years	24
		11.5%
	21-25 years	13
		6.3%
	26-30 years	15
		7.2%
	31-40 years	16
		7.7%
	More than 40 years	24
		11.5%
Total		208
		100.0%

Statistics

Number of whole years		
N	Valid	208
	Missing	0
Mean		20.05
Median		14.50
Sum		4170

		Size of Business			
		Small Firm	Medium Firm	Large Firm	Total
Number of years	0-5 years	56	0	0	56
		28.1%	.0%	.0%	26.9%
	6-10 years	37	0	0	37
		18.6%	.0%	.0%	17.8%
	11-15 years	22	1	0	23
		11.1%	12.5%	.0%	11.1%
	16-20 years	22	2	0	24
		11.1%	25.0%	.0%	11.5%
	21-25 years	12	1	0	13
		6.0%	12.5%	.0%	6.3%
	26-30 years	14	1	0	15
		7.0%	12.5%	.0%	7.2%
	31-40 years	16	0	0	16
		8.0%	.0%	.0%	7.7%
	More than 40 years	20	3	1	24
		10.1%	37.5%	100.0%	11.5%
Total		199	8	1	208
		100.0%	100.0%	100.0%	100.0%



Number of whole years

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 0	5	2.4	2.4	2.4
1	7	3.4	3.4	5.8
2	12	5.8	5.8	11.5
3	11	5.3	5.3	16.8
4	12	5.8	5.8	22.6
5	9	4.3	4.3	26.9
6	7	3.4	3.4	30.3
7	8	3.8	3.8	34.1
8	4	1.9	1.9	36.1
9	4	1.9	1.9	38.0
10	14	6.7	6.7	44.7
11	1	.5	.5	45.2
12	5	2.4	2.4	47.6
13	3	1.4	1.4	49.0
14	2	1.0	1.0	50.0
15	12	5.8	5.8	55.8
16	5	2.4	2.4	58.2
17	2	1.0	1.0	59.1
18	2	1.0	1.0	60.1
19	1	.5	.5	60.6
20	14	6.7	6.7	67.3
21	1	.5	.5	67.8
22	3	1.4	1.4	69.2
23	2	1.0	1.0	70.2
24	1	.5	.5	70.7
25	6	2.9	2.9	73.6
26	1	.5	.5	74.0
27	2	1.0	1.0	75.0
28	3	1.4	1.4	76.4
29	1	.5	.5	76.9
30	8	3.8	3.8	80.8
31	2	1.0	1.0	81.7
32	1	.5	.5	82.2
33	2	1.0	1.0	83.2
34	1	.5	.5	83.7
35	1	.5	.5	84.1
37	1	.5	.5	84.6
38	1	.5	.5	85.1
39	2	1.0	1.0	86.1
40	5	2.4	2.4	88.5
42	1	.5	.5	88.9
44	1	.5	.5	89.4
50	8	3.8	3.8	93.3
54	1	.5	.5	93.8
55	1	.5	.5	94.2
57	1	.5	.5	94.7
60	2	1.0	1.0	95.7
65	3	1.4	1.4	97.1
70	2	1.0	1.0	98.1
99	1	.5	.5	98.6
116	1	.5	.5	99.0
146	1	.5	.5	99.5
150	1	.5	.5	100.0
Total	208	100.0	100.0	



Q2. Which of the following describes your business?

Which of the following describes your business?	Work from home	18
		8.7%
	Work in an office/shop	182
		87.5%
	Mobile business	8
		3.8%
	Total	208
		100.0%

		Which of the following describes your business?			
		Work from home	Work in an office/shop	Mobile business	Total
What business sector do you fall into?	Retail	2	64	0	66
		3.0%	97.0%	.0%	100.0%
	Hospitality/restaurants	1	33	0	34
		2.9%	97.1%	.0%	100.0%
	Health services	2	17	0	19
		10.5%	89.5%	.0%	100.0%
	Building, real estate and development	4	9	5	18
		22.2%	50.0%	27.8%	100.0%
	Other (please specify)	0	14	2	16
		.0%	87.5%	12.5%	100.0%
	Personal services (legal, medical, etc.)	4	11	0	15
		26.7%	73.3%	.0%	100.0%
	Consulting and business services	3	6	0	9
		33.3%	66.7%	.0%	100.0%
	Banking and finance	0	5	1	6
		.0%	83.3%	16.7%	100.0%
	Tourism	0	6	0	6
		.0%	100.0%	.0%	100.0%
	Food and beverage distribution	0	3	0	3
		.0%	100.0%	.0%	100.0%
	Manufacturing	0	3	0	3
		.0%	100.0%	.0%	100.0%
	Technology and communications	1	2	0	3
		33.3%	66.7%	.0%	100.0%
	Education	0	2	0	2
		.0%	100.0%	.0%	100.0%
	Mining and exploration	1	1	0	2
		50.0%	50.0%	.0%	100.0%
	Arts, creative industry	0	2	0	2
		.0%	100.0%	.0%	100.0%
	Not for profit	0	2	0	2
		.0%	100.0%	.0%	100.0%
	Transport	0	2	0	2
		.0%	100.0%	.0%	100.0%
	Total	18	182	8	208
		8.7%	87.5%	3.8%	100.0%



Q3. How many full time and part time employees does your business employ?

Statistics			
		Full time employees	Part time employees
N	Valid	187	151
	Missing	21	57
Mean		6.64	11.83
Median		2.00	3.00
Sum		1242	1786

Full time employees					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	64	30.8	34.2	34.2
	2	34	16.3	18.2	52.4
	3	21	10.1	11.2	63.6
	4	20	9.6	10.7	74.3
	5	16	7.7	8.6	82.9
	6	4	1.9	2.1	85.0
	7	4	1.9	2.1	87.2
	8	2	1.0	1.1	88.2
	9	2	1.0	1.1	89.3
	10	4	1.9	2.1	91.4
	11	1	.5	.5	92.0
	12	3	1.4	1.6	93.6
	13	2	1.0	1.1	94.7
	14	1	.5	.5	95.2
	20	1	.5	.5	95.7
	22	2	1.0	1.1	96.8
	24	1	.5	.5	97.3
	30	1	.5	.5	97.9
	48	1	.5	.5	98.4
	50	1	.5	.5	98.9
	62	1	.5	.5	99.5
	396	1	.5	.5	100.0
Total		187	89.9	100.0	
Missing	System	21	10.1		
Total		208	100.0		



Part time employees

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	40	19.2	26.5	26.5
	2	31	14.9	20.5	47.0
	3	12	5.8	7.9	55.0
	4	12	5.8	7.9	62.9
	5	4	1.9	2.6	65.6
	6	7	3.4	4.6	70.2
	7	7	3.4	4.6	74.8
	8	3	1.4	2.0	76.8
	10	3	1.4	2.0	78.8
	11	1	.5	.7	79.5
	12	4	1.9	2.6	82.1
	13	1	.5	.7	82.8
	14	2	1.0	1.3	84.1
	15	3	1.4	2.0	86.1
	16	3	1.4	2.0	88.1
	18	3	1.4	2.0	90.1
	20	6	2.9	4.0	94.0
	24	1	.5	.7	94.7
	25	2	1.0	1.3	96.0
	26	1	.5	.7	96.7
	30	1	.5	.7	97.4
	40	1	.5	.7	98.0
	51	1	.5	.7	98.7
	140	1	.5	.7	99.3
	707	1	.5	.7	100.0
	Total	151	72.6	100.0	
Missing	System	57	27.4		
Total		208	100.0		

Size of business based on FTE's

Size of Business	Small Firm	199
		95.7%
	Medium Firm	8
		3.8%
	Large Firm	1
		.5%
	Total	208
		100.0%

Which of the following describes your business?				
		Work from home	Work in an office/shop	Mobile business
Size of Business	Small Firm	18	173	8
		100.0%	95.1%	100.0%
	Medium Firm	0	8	0
		.0%	4.4%	.0%
	Large Firm	0	1	0
		.0%	.5%	.0%
	Total	18	182	8
		100.0%	100.0%	100.0%



		Size of Business			
		Small Firm	Medium Firm	Large Firm	Total
What business sector do you fall into?	Retail	64	2	0	66
		97.0%	3.0%	.0%	100.0%
	Hospitality/restaurants	32	2	0	34
		94.1%	5.9%	.0%	100.0%
	Health services	19	0	0	19
		100.0%	.0%	.0%	100.0%
	Building, real estate and development	17	1	0	18
		94.4%	5.6%	.0%	100.0%
	Other (please specify)	16	0	0	16
		100.0%	.0%	.0%	100.0%
	Personal services (legal, medical, etc.)	15	0	0	15
		100.0%	.0%	.0%	100.0%
	Consulting and business services	8	1	0	9
		88.9%	11.1%	.0%	100.0%
	Banking and finance	6	0	0	6
		100.0%	.0%	.0%	100.0%
	Tourism	6	0	0	6
		100.0%	.0%	.0%	100.0%
	Food and beverage distribution	3	0	0	3
		100.0%	.0%	.0%	100.0%
	Manufacturing	2	1	0	3
		66.7%	33.3%	.0%	100.0%
	Technology and communications	3	0	0	3
		100.0%	.0%	.0%	100.0%
	Education	2	0	0	2
		100.0%	.0%	.0%	100.0%
	Mining and exploration	1	1	0	2
		50.0%	50.0%	.0%	100.0%
	Arts, creative industry	2	0	0	2
		100.0%	.0%	.0%	100.0%
	Not for profit	1	0	1	2
		50.0%	.0%	50.0%	100.0%
	Transport	2	0	0	2
		100.0%	.0%	.0%	100.0%
	Total	199	8	1	208
		95.7%	3.8%	.5%	100.0%



Q4. What ratio of each of the following do you employ on a full time basis to the nearest 10 percent?**Gender**

Statistics			
		Male – Ratio	Female – Ratio
N	Valid	200	200
	Missing	8	8
Mean		4.9150	6.6400

	0	10	20	30	40	50	60	70	80	90	100	Total
Male – Ratio	53	20	19	11	7	31	8	8	11	3	29	200
	26.5%	10.0%	9.5%	5.5%	3.5%	15.5%	4.0%	4.0%	5.5%	1.5%	14.5%	100.0%
Female – Ratio	32	9	8	10	10	32	7	11	19	18	44	200
	16.0%	4.5%	4.0%	5.0%	5.0%	16.0%	3.5%	5.5%	9.5%	9.0%	22.0%	100.0%

Skilled/Unskilled

Statistics			
		Skilled – Ratio	Unskilled – Ratio
N	Valid	200	200
	Missing	8	8
Mean		7.3350	2.1250

	0	10	20	30	40	50	60	70	80	90	100	Total
Skilled – Ratio	42	9	5	8	1	13	2	3	19	10	88	200
	21.0%	4.5%	2.5%	4.0%	.5%	6.5%	1.0%	1.5%	9.5%	5.0%	44.0%	100.0%
Unskilled – Ratio	159	5	7	1	0	9	2	6	3	0	8	200
	79.5%	2.5%	3.5%	.5%	.0%	4.5%	1.0%	3.0%	1.5%	.0%	4.0%	100.0%

Full time/Part time Employees

Statistics			
		Full time employees – Ratio	Part time employees – Ratio
N	Valid	200	200
	Missing	8	8
Mean		5.8000	4.2450

	0	10	20	30	40	50	60	70	80	90	100	Total
Full time employees – Ratio	44	13	13	22	4	18	8	10	17	15	36	200
	22.0%	6.5%	6.5%	11.0%	2.0%	9.0%	4.0%	5.0%	8.5%	7.5%	18.0%	100.0%
Part time employees – Ratio	69	20	17	13	8	18	6	22	9	8	10	200
	34.5%	10.0%	8.5%	6.5%	4.0%	9.0%	3.0%	11.0%	4.5%	4.0%	5.0%	100.0%



Q5. How do you expect the national economy to perform over the next 12 months?

How do you expect the national economy to perform over the next 12 months?	Much stronger	2
		1.0%
	Somewhat strong	13
		6.3%
	About the same	101
		48.6%
	Somewhat weak	70
		33.7%
	Much weaker	22
		10.6%
	Total	208
		100.0%

		Size of Business			
		Small Firm	Medium Firm	Large Firm	Total
How do you expect the national economy to perform over the next 12 months?	Much stronger	2	0	0	2
		1.0%	.0%	.0%	1.0%
	Somewhat strong	13	0	0	13
		6.5%	.0%	.0%	6.3%
	About the same	97	4	0	101
		48.7%	50.0%	.0%	48.6%
	Somewhat weak	66	3	1	70
		33.2%	37.5%	100.0%	33.7%
	Much weaker	21	1	0	22
		10.6%	12.5%	.0%	10.6%
	Total	199	8	1	208
		100.0%	100.0%	100.0%	100.0%



		How do you expect the national economy to perform over the next 12 months?					
		Much stronger	Somewhat strong	About the same	Somewhat weak	Much weaker	Total
What business sector do you fall into?	Retail	0	8	29	19	10	66
		.0%	12.1%	43.9%	28.8%	15.2%	100.0%
	Hospitality/restaurants	0	1	15	14	4	34
		.0%	2.9%	44.1%	41.2%	11.8%	100.0%
	Health services	0	1	8	8	2	19
		.0%	5.3%	42.1%	42.1%	10.5%	100.0%
	Building, real estate and development	1	1	10	6	0	18
		5.6%	5.6%	55.6%	33.3%	.0%	100.0%
	Other (please specify)	1	0	12	3	0	16
		6.3%	.0%	75.0%	18.8%	.0%	100.0%
	Personal services (legal, medical, etc.)	0	1	7	6	1	15
		.0%	6.7%	46.7%	40.0%	6.7%	100.0%
	Consulting and business services	0	0	3	4	2	9
		.0%	.0%	33.3%	44.4%	22.2%	100.0%
	Banking and finance	0	1	3	1	1	6
		.0%	16.7%	50.0%	16.7%	16.7%	100.0%
	Tourism	0	0	2	4	0	6
		.0%	.0%	33.3%	66.7%	.0%	100.0%
	Food and beverage distribution	0	0	1	1	1	3
		.0%	.0%	33.3%	33.3%	33.3%	100.0%
	Manufacturing	0	0	3	0	0	3
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Technology and communications	0	0	2	1	0	3
		.0%	.0%	66.7%	33.3%	.0%	100.0%
	Education	0	0	1	1	0	2
		.0%	.0%	50.0%	50.0%	.0%	100.0%
	Mining and exploration	0	0	0	1	1	2
		.0%	.0%	.0%	50.0%	50.0%	100.0%
	Arts, creative industry	0	0	2	0	0	2
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Not for profit	0	0	1	1	0	2
		.0%	.0%	50.0%	50.0%	.0%	100.0%
	Transport	0	0	2	0	0	2
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Total	2	13	101	70	22	208
		1.0%	6.3%	48.6%	33.7%	10.6%	100.0%



Q6. How do you expect the South Australian economy to perform over the next 12 months?

How do you expect the South Australian economy to perform over the next 12 months?	Much stronger	2
		1.0%
	Somewhat stronger	15
		7.2%
	About the same	72
		34.6%
	Somewhat weaker	84
		40.4%
	Much weaker	35
		16.8%
	Total	208
		100.0%

		Size of Business			
		Small Firm	Medium Firm	Large Firm	Total
How do you expect the South Australian economy to perform over the next 12 months?	Much stronger	2	0	0	2
		1.0%	.0%	.0%	1.0%
	Somewhat stronger	15	0	0	15
		7.5%	.0%	.0%	7.2%
	About the same	69	3	0	72
		34.7%	37.5%	.0%	34.6%
	Somewhat weaker	79	4	1	84
		39.7%	50.0%	100.0%	40.4%
	Much weaker	34	1	0	35
		17.1%	12.5%	.0%	16.8%
	Total	199	8	1	208
		100.0%	100.0%	100.0%	100.0%



		How do you expect the South Australian economy to perform over the next 12 months?					
		Much stronger	Somewhat stronger	About the same	Somewhat weaker	Much weaker	Total
What business sector do you fall into?	Retail	1	7	25	25	8	66
		1.5%	10.6%	37.9%	37.9%	12.1%	100.0%
	Hospitality/restaurants	0	2	9	15	8	34
		.0%	5.9%	26.5%	44.1%	23.5%	100.0%
	Health services	0	1	5	8	5	19
		.0%	5.3%	26.3%	42.1%	26.3%	100.0%
	Building, real estate and development	1	1	8	5	3	18
		5.6%	5.6%	44.4%	27.8%	16.7%	100.0%
	Other (please specify)	0	2	7	7	0	16
		.0%	12.5%	43.8%	43.8%	.0%	100.0%
	Personal services (legal, medical, etc.)	0	1	8	3	3	15
		.0%	6.7%	53.3%	20.0%	20.0%	100.0%
	Consulting and business services	0	0	2	3	4	9
		.0%	.0%	22.2%	33.3%	44.4%	100.0%
	Banking and finance	0	1	1	3	1	6
		.0%	16.7%	16.7%	50.0%	16.7%	100.0%
	Tourism	0	0	0	5	1	6
		.0%	.0%	.0%	83.3%	16.7%	100.0%
	Food and beverage distribution	0	0	0	2	1	3
		.0%	.0%	.0%	66.7%	33.3%	100.0%
	Manufacturing	0	0	3	0	0	3
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Technology and communications	0	0	1	2	0	3
		.0%	.0%	33.3%	66.7%	.0%	100.0%
	Education	0	0	0	2	0	2
		.0%	.0%	.0%	100.0%	.0%	100.0%
	Mining and exploration	0	0	0	1	1	2
		.0%	.0%	.0%	50.0%	50.0%	100.0%
	Arts, creative industry	0	0	1	1	0	2
		.0%	.0%	50.0%	50.0%	.0%	100.0%
	Not for profit	0	0	1	1	0	2
		.0%	.0%	50.0%	50.0%	.0%	100.0%
	Transport	0	0	1	1	0	2
		.0%	.0%	50.0%	50.0%	.0%	100.0%
	Total	2	15	72	84	35	208
		1.0%	7.2%	34.6%	40.4%	16.8%	100.0%



Q7. How do you expect the local City of Holdfast Bay area economy to perform over the next 12 months?

How do you expect the local City of Holdfast Bay area economy to perform over the next 12 months?	Much stronger	2
		1.0%
	Somewhat stronger	18
		8.7%
	About the same	104
		50.0%
	Somewhat weaker	65
		31.3%
	Much weaker	19
		9.1%
	Total	208
		100.0%

		Size of Business			
		Small Firm	Medium Firm	Large Firm	Total
How do you expect the local City of Holdfast Bay area economy to perform over the next 12 months?	Much stronger	2	0	0	2
		1.0%	.0%	.0%	1.0%
	Somewhat stronger	17	1	0	18
		8.5%	12.5%	.0%	8.7%
	About the same	98	5	1	104
		49.2%	62.5%	100.0%	50.0%
	Somewhat weaker	63	2	0	65
		31.7%	25.0%	.0%	31.3%
	Much weaker	19	0	0	19
		9.5%	.0%	.0%	9.1%
	Total	199	8	1	208
		100.0%	100.0%	100.0%	100.0%



		How do you expect the local City of Holdfast Bay area economy to perform over the next 12 months?					
		Much stronger	Somewhat stronger	About the same	Somewhat weaker	Much weaker	Total
What business sector do you fall into?	Retail	2	8	27	19	10	66
		3.0%	12.1%	40.9%	28.8%	15.2%	100.0%
	Hospitality/restaurants	0	2	12	16	4	34
		.0%	5.9%	35.3%	47.1%	11.8%	100.0%
	Health services	0	1	12	3	3	19
		.0%	5.3%	63.2%	15.8%	15.8%	100.0%
	Building, real estate and development	0	0	12	6	0	18
		.0%	.0%	66.7%	33.3%	.0%	100.0%
	Other (please specify)	0	3	10	3	0	16
		.0%	18.8%	62.5%	18.8%	.0%	100.0%
	Personal services (legal, medical, etc.)	0	1	10	4	0	15
		.0%	6.7%	66.7%	26.7%	.0%	100.0%
	Consulting and business services	0	1	5	3	0	9
		.0%	11.1%	55.6%	33.3%	.0%	100.0%
	Banking and finance	0	2	1	2	1	6
		.0%	33.3%	16.7%	33.3%	16.7%	100.0%
	Tourism	0	0	2	4	0	6
		.0%	.0%	33.3%	66.7%	.0%	100.0%
	Food and beverage distribution	0	0	0	2	1	3
		.0%	.0%	.0%	66.7%	33.3%	100.0%
	Manufacturing	0	0	3	0	0	3
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Technology and communications	0	0	2	1	0	3
		.0%	.0%	66.7%	33.3%	.0%	100.0%
	Education	0	0	1	1	0	2
		.0%	.0%	50.0%	50.0%	.0%	100.0%
	Mining and exploration	0	0	1	1	0	2
		.0%	.0%	50.0%	50.0%	.0%	100.0%
	Arts, creative industry	0	0	2	0	0	2
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Not for profit	0	0	2	0	0	2
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Transport	0	0	2	0	0	2
		.0%	.0%	100.0%	.0%	.0%	100.0%
	Total	2	18	104	65	19	208
		1.0%	8.7%	50.0%	31.3%	9.1%	100.0%



Q8. How would you describe the following business KPIs in the last quarter of 2014?

	Up	Same	Down	Total
General business conditions	35 16.9%	104 50.2%	68 32.9%	207 100.0%
Sales revenue	51 24.5%	80 38.5%	77 37.0%	208 100.0%
Wage growth	68 33.3%	118 57.8%	18 8.8%	204 100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	85 41.1%	114 55.1%	8 3.9%	207 100.0%
Selling prices	44 21.3%	134 64.7%	29 14.0%	207 100.0%
Profit growth	28 13.6%	95 46.1%	83 40.3%	206 100.0%
Number of employees	18 8.8%	150 73.2%	37 18.0%	205 100.0%
Overtime utilisation	13 6.4%	155 76.7%	34 16.8%	202 100.0%
Investment in buildings and structures	15 7.5%	142 71.4%	42 21.1%	199 100.0%
Investment in plant and equipment	42 20.9%	114 56.7%	45 22.4%	201 100.0%

		Size of Business			Total
		Small Firm	Medium Firm	Large Firm	
General business conditions	Up	32 16.2%	3 37.5%	0 .0%	35 16.9%
	Same	100 50.5%	3 37.5%	1 100.0%	104 50.2%
	Down	66 33.3%	2 25.0%	0 .0%	68 32.9%
	Total	198 100.0%	8 100.0%	1 100.0%	207 100.0%
Sales revenue	Up	48 24.1%	3 37.5%	0 .0%	51 24.5%
	Same	76 38.2%	3 37.5%	1 100.0%	80 38.5%
	Down	75 37.7%	2 25.0%	0 .0%	77 37.0%
	Total	199 100.0%	8 100.0%	1 100.0%	208 100.0%
Wage growth	Up	64 32.8%	4 50.0%	0 .0%	68 33.3%
	Same	113 57.9%	4 50.0%	1 100.0%	118 57.8%
	Down	18 9.2%	0 .0%	0 .0%	18 8.8%
	Total	195 100.0%	8 100.0%	1 100.0%	204 100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	Up	81 40.9%	4 50.0%	0 .0%	85 41.1%
	Same	109 55.1%	4 50.0%	1 100.0%	114 55.1%
	Down	8 4.0%	0 .0%	0 .0%	8 3.9%
	Total	198 100.0%	8 100.0%	1 100.0%	207 100.0%



Selling prices	Up	44	0	0	44
		22.2%	.0%	.0%	21.3%
	Same	128	5	1	134
		64.6%	62.5%	100.0%	64.7%
	Down	26	3	0	29
		13.1%	37.5%	.0%	14.0%
	Total	198	8	1	207
		100.0%	100.0%	100.0%	100.0%
Profit growth	Up	28	0	0	28
		14.2%	.0%	.0%	13.6%
	Same	90	4	1	95
		45.7%	50.0%	100.0%	46.1%
	Down	79	4	0	83
		40.1%	50.0%	.0%	40.3%
	Total	197	8	1	206
		100.0%	100.0%	100.0%	100.0%
Number of employees	Up	17	1	0	18
		8.7%	12.5%	.0%	8.8%
	Same	143	6	1	150
		73.0%	75.0%	100.0%	73.2%
	Down	36	1	0	37
		18.4%	12.5%	.0%	18.0%
	Total	196	8	1	205
		100.0%	100.0%	100.0%	100.0%
Overtime utilisation	Up	12	1	0	13
		6.2%	12.5%	.0%	6.4%
	Same	149	5	1	155
		77.2%	62.5%	100.0%	76.7%
	Down	32	2	0	34
		16.6%	25.0%	.0%	16.8%
	Total	193	8	1	202
		100.0%	100.0%	100.0%	100.0%
Investment in buildings and structures	Up	14	1	0	15
		7.4%	12.5%	.0%	7.5%
	Same	136	5	1	142
		71.6%	62.5%	100.0%	71.4%
	Down	40	2	0	42
		21.1%	25.0%	.0%	21.1%
	Total	190	8	1	199
		100.0%	100.0%	100.0%	100.0%
Investment in plant and equipment	Up	41	1	0	42
		21.4%	12.5%	.0%	20.9%
	Same	108	5	1	114
		56.3%	62.5%	100.0%	56.7%
	Down	43	2	0	45
		22.4%	25.0%	.0%	22.4%
	Total	192	8	1	201
		100.0%	100.0%	100.0%	100.0%



Q9. How do you expect the same business KPIs to perform in the current first quarter of 2015? Will they be up, down or about the same as the previous quarter?

	Up	Same	Down	Total
General business conditions	35 16.9%	113 54.6%	59 28.5%	207 100.0%
Sales revenue	52 25.0%	86 41.3%	70 33.7%	208 100.0%
Wage growth	46 22.4%	137 66.8%	22 10.7%	205 100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	57 27.7%	137 66.5%	12 5.8%	206 100.0%
Selling prices	46 22.3%	134 65.0%	26 12.6%	206 100.0%
Profit growth	39 18.8%	95 45.7%	74 35.6%	208 100.0%
Number of employees	16 7.8%	162 78.6%	28 13.6%	206 100.0%
Overtime utilisation	11 5.5%	155 77.9%	33 16.6%	199 100.0%
Investment in buildings and structures	15 7.5%	150 74.6%	36 17.9%	201 100.0%
Investment in plant and equipment	29 14.4%	135 66.8%	38 18.8%	202 100.0%

		Size of Business			Total
		Small Firm	Medium Firm	Large Firm	
General business conditions	Up	33 16.7%	2 25.0%	0 .0%	35 16.9%
	Same	108 54.5%	4 50.0%	1 100.0%	113 54.6%
	Down	57 28.8%	2 25.0%	0 .0%	59 28.5%
	Total	198 100.0%	8 100.0%	1 100.0%	207 100.0%
Sales revenue	Up	50 25.1%	2 25.0%	0 .0%	52 25.0%
	Same	81 40.7%	4 50.0%	1 100.0%	86 41.3%
	Down	68 34.2%	2 25.0%	0 .0%	70 33.7%
	Total	199 100.0%	8 100.0%	1 100.0%	208 100.0%
Wage growth	Up	45 23.0%	1 12.5%	0 .0%	46 22.4%
	Same	129 65.8%	7 87.5%	1 100.0%	137 66.8%
	Down	22 11.2%	0 .0%	0 .0%	22 10.7%
	Total	196 100.0%	8 100.0%	1 100.0%	205 100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	Up	56 28.4%	1 12.5%	0 .0%	57 27.7%
	Same	129 65.5%	7 87.5%	1 100.0%	137 66.5%
	Down	12 6.1%	0 .0%	0 .0%	12 5.8%
	Total	197 100.0%	8 100.0%	1 100.0%	206 100.0%



Selling prices	Up	45	1	0	46
		22.8%	12.5%	.0%	22.3%
	Same	128	5	1	134
		65.0%	62.5%	100.0%	65.0%
	Down	24	2	0	26
Profit growth		12.2%	25.0%	.0%	12.6%
	Total	197	8	1	206
		100.0%	100.0%	100.0%	100.0%
	Up	38	1	0	39
		19.1%	12.5%	.0%	18.8%
Number of employees	Same	90	4	1	95
		45.2%	50.0%	100.0%	45.7%
	Down	71	3	0	74
		35.7%	37.5%	.0%	35.6%
	Total	199	8	1	208
Overtime utilisation		100.0%	100.0%	100.0%	100.0%
	Up	16	0	0	16
		8.1%	.0%	.0%	7.8%
	Same	155	6	1	162
		78.7%	75.0%	100.0%	78.6%
Investment in buildings and structures	Down	26	2	0	28
		13.2%	25.0%	.0%	13.6%
	Total	197	8	1	206
		100.0%	100.0%	100.0%	100.0%
	Up	11	0	0	11
Investment in plant and equipment		5.8%	.0%	.0%	5.5%
	Same	149	5	1	155
		78.4%	62.5%	100.0%	77.9%
	Down	30	3	0	33
		15.8%	37.5%	.0%	16.6%
Investment in buildings and structures	Total	190	8	1	199
		100.0%	100.0%	100.0%	100.0%
	Up	15	0	0	15
		7.8%	.0%	.0%	7.5%
	Same	144	5	1	150
Investment in plant and equipment		75.0%	62.5%	100.0%	74.6%
	Down	33	3	0	36
		17.2%	37.5%	.0%	17.9%
	Total	192	8	1	201
		100.0%	100.0%	100.0%	100.0%
Investment in plant and equipment	Up	29	0	0	29
		15.0%	.0%	.0%	14.4%
	Same	128	6	1	135
		66.3%	75.0%	100.0%	66.8%
	Down	36	2	0	38
Investment in plant and equipment		18.7%	25.0%	.0%	18.8%
	Total	193	8	1	202
		100.0%	100.0%	100.0%	100.0%



Q10. On a scale of zero to ten, how would you rate the degree to which each of the following factors constrain your investment in plant and equipment. Zero means that it is not a constraint at all to you and ten means it is a major constraint for you.

Insufficient demand	5.98
Business taxes and government charges	7.48
Local competition	5.38
Insufficient retained earnings	6.50
Import competition	4.44
Wage costs	6.88
Current levels of debt	5.73
Non-wage labour costs	5.57
State Government regulations	6.51
Charges by lending institutions	5.84
Federal Government regulations	6.14

	Size of Business			
	Small Firm	Medium Firm	Large Firm	Total
Insufficient demand	5.95	7.13	2.00	5.98
Business taxes and government charges	7.47	7.88	6.00	7.48
Local competition	5.41	4.87	2.00	5.38
Insufficient retained earnings	6.47	7.25	7.00	6.50
Import competition	4.45	4.25	3.00	4.44
Wage costs	6.79	8.75	8.00	6.88
Current levels of debt	5.72	5.63	7.00	5.73
Non-wage labour costs	5.48	7.25	8.00	5.57
State Government regulations	6.47	7.38	8.00	6.51
Charges by lending institutions	5.81	6.63	6.00	5.84
Federal Government regulations	6.09	7.63	4.00	6.14

	0 Not a constraint	1	2	3	4	5	6	7	8	9	10 Major constraint	Total
Insufficient demand	40 19.3%	3 1.4%	5 2.4%	11 5.3%	23 11.1%	43 20.8%	13 6.3%	17 8.2%	16 7.7%	8 3.9%	28 13.5%	207 100.0%
Business taxes and government charges	16 7.7%	1 .5%	2 1.0%	8 3.9%	10 4.8%	38 18.4%	22 10.6%	29 14.0%	24 11.6%	15 7.2%	42 20.3%	207 100.0%
Local competition	41 19.8%	13 6.3%	7 3.4%	12 5.8%	17 8.2%	49 23.7%	14 6.8%	21 10.1%	12 5.8%	7 3.4%	14 6.8%	207 100.0%
Insufficient retained earnings	22 10.8%	7 3.4%	9 4.4%	11 5.4%	10 4.9%	51 25.1%	12 5.9%	19 9.4%	22 10.8%	17 8.4%	23 11.3%	203 100.0%
Import competition	70 34.5%	11 5.4%	14 6.9%	10 4.9%	9 4.4%	46 22.7%	5 2.5%	7 3.4%	9 4.4%	8 3.9%	14 6.9%	203 100.0%
Wage costs	27 13.3%	4 2.0%	3 1.5%	3 1.5%	12 5.9%	45 22.2%	20 9.9%	17 8.4%	24 11.8%	10 4.9%	38 18.7%	203 100.0%
Current levels of debt	40 19.5%	9 4.4%	9 4.4%	6 2.9%	12 5.9%	55 26.8%	15 7.3%	13 6.3%	16 7.8%	8 3.9%	22 10.7%	205 100.0%
Non-wage labour costs	44 22.0%	12 6.0%	7 3.5%	7 3.5%	11 5.5%	43 21.5%	20 10.0%	14 7.0%	12 6.0%	7 3.5%	23 11.5%	200 100.0%
State Government regulations	28 13.7%	4 2.0%	13 6.3%	6 2.9%	9 4.4%	43 21.0%	21 10.2%	15 7.3%	24 11.7%	12 5.9%	30 14.6%	205 100.0%
Charges by lending institutions	39 19.1%	8 3.9%	9 4.4%	11 5.4%	11 5.4%	40 19.6%	20 9.8%	18 8.8%	13 6.4%	16 7.8%	19 9.3%	204 100.0%
Federal Government regulations	34 16.7%	5 2.5%	11 5.4%	6 3.0%	9 4.4%	45 22.2%	25 12.3%	14 6.9%	18 8.9%	15 7.4%	21 10.3%	203 100.0%



Q12. What business sector do you fall into?

What business sector do you fall into?	Retail	66
		31.7%
	Hospitality/restaurants	34
		16.3%
	Health services	19
		9.1%
	Building, real estate and development	18
		8.7%
	Other (please specify)	16
		7.7%
	Personal services (legal, medical, etc.)	15
		7.2%
	Consulting and business services	9
		4.3%
	Banking and finance	6
		2.9%
	Tourism	6
		2.9%
	Food and beverage distribution	3
		1.4%
	Manufacturing	3
		1.4%
	Technology and communications	3
		1.4%
	Education	2
		1.0%
	Mining and exploration	2
		1.0%
	Arts, creative industry	2
		1.0%
	Not for profit	2
		1.0%
	Transport	2
		1.0%
	Total	208
		100.0%



		Size of Business			
		Small Firm	Medium Firm	Large Firm	Total
What business sector do you fall into?	Retail	64	2	0	66
		32.2%	25.0%	.0%	31.7%
	Hospitality/restaurants	32	2	0	34
		16.1%	25.0%	.0%	16.3%
	Health services	19	0	0	19
		9.5%	.0%	.0%	9.1%
	Building, real estate and development	17	1	0	18
		8.5%	12.5%	.0%	8.7%
	Other (please specify)	16	0	0	16
		8.0%	.0%	.0%	7.7%
	Personal services (legal, medical, etc.)	15	0	0	15
		7.5%	.0%	.0%	7.2%
	Consulting and business services	8	1	0	9
		4.0%	12.5%	.0%	4.3%
	Banking and finance	6	0	0	6
		3.0%	.0%	.0%	2.9%
	Tourism	6	0	0	6
		3.0%	.0%	.0%	2.9%
	Food and beverage distribution	3	0	0	3
		1.5%	.0%	.0%	1.4%
	Manufacturing	2	1	0	3
		1.0%	12.5%	.0%	1.4%
	Technology and communications	3	0	0	3
		1.5%	.0%	.0%	1.4%
	Education	2	0	0	2
		1.0%	.0%	.0%	1.0%
	Mining and exploration	1	1	0	2
		.5%	12.5%	.0%	1.0%
	Arts, creative industry	2	0	0	2
		1.0%	.0%	.0%	1.0%
	Not for profit	1	0	1	2
		.5%	.0%	100.0%	1.0%
	Transport	2	0	0	2
		1.0%	.0%	.0%	1.0%
	Total	199	8	1	208
		100.0%	100.0%	100.0%	100.0%



7. QUESTIONNAIRE

City of Holdfast Bay Small Business Survey

***1. How long has your business operated in the City of Holdfast Bay Council area?**
 Number of whole years

***2. Which of the following describes your business?**

☐ Work from home
☐ Work in an office/shop
☐ Mobile business

***3. How many full time and part time employees does your business employ?**

Full time employees
 Part time employees

***4. What ratio of each of the following do you employ on a full time basis to the nearest 10 percent?**

	Ratio
Male	<input type="text"/>
Female	<input type="text"/>
Skilled	<input type="text"/>
Unskilled	<input type="text"/>
Full time employees	<input type="text"/>
Part time employees	<input type="text"/>

***5. How do you expect the national economy to perform over the next 12 months?**

☐ Much stronger
☐ Somewhat strong
☐ About the same
☐ Somewhat weak
☐ Much weaker

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City of Holdfast Bay Small Business Survey

***6. How do you expect the South Australian economy to perform over the next 12 months?**

- ☐ Much stronger
- ☐ Somewhat strong
- ☐ About the same
- ☐ Somewhat weak
- ☐ Much weaker

***7. How do you expect the local City of Holdfast Bay area economy to perform over the next 12 months?**

- ☐ Much stronger
- ☐ Somewhat strong
- ☐ About the same
- ☐ Somewhat weak
- ☐ Much weaker

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City of Holdfast Bay Small Business Survey

***8. How would you describe the following business KPIs in the last quarter of 2014? Were they up, down or about the same as the previous quarter?**

	Up	Same	Down
General business conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales revenue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wage growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selling prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profit growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overtime utilisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment in buildings and structures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment in plant and equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

***9. How do you expect the same business KPIs to perform in the current first quarter of 2015? Will they be up, down or about the same as the previous quarter?**

	Up	Same	Down
General business conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales revenue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wage growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selling prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profit growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overtime utilisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment in buildings and structures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Investment in plant and equipment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



City of Holdfast Bay Small Business Survey

***10. On a scale of zero to ten, how would you rate the degree to which each of the following factors constrain your investment in plant and equipment. Zero means that it is not a constraint at all to you and ten means it is a major constraint for you.**

	0 Not a constraint	1	2	3	4	5	6	7	8	9	10 Major constraint
Insufficient demand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business taxes and government charges	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Insufficient retained earnings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Import competition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wage costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Current levels of debt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Non-wage labour costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
State Government regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charges by lending institutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Federal Government regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

11. Do you have any suggestions or ideas on what strategies the City of Holdfast Bay can implement to support better business conditions for you?



City of Holdfast Bay Small Business Survey***12. What business sector do you fall into?**

- ☐ Retail
- ☐ Hospitality/restaurants
- ☐ Arts, creative industry
- ☐ Personal services (legal, medical, etc.)
- ☐ Building, real estate and development
- ☐ Education
- ☐ Food and beverage distribution
- ☐ Banking and finance
- ☐ Consulting and business services
- ☐ Health services
- ☐ Manufacturing
- ☐ Mining and exploration
- ☐ Not for profit
- ☐ Technology and communications
- ☐ Tourism
- ☐ Transport
- ☐ Wholesale
- ☐ Wine
- ☐ Other (please specify)

