

A RESEARCH REPORT TO  
THE CITY OF HOLDFAST BAY  
FOR A SURVEY ON BUSINESS  
CONFIDENCE (REVISED)  
DATED 30 NOVEMBER 2017  
PREPARED BY INTUITO PTY LTD

intuito  
market research

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## 1. INTRODUCTION

Intuito is pleased to present this research report to the City of Holdfast Bay for market research to measure business confidence and how Council can help develop better business conditions. This study was conducted in a variety of ways, firstly emails were sent to various lists of businesses in the Council area containing a link to the study. We reminded recipients on several lists, not including the major 10,000 ABR listing spreadsheet we obtained through Council but the Jetty Road Traders south and north listings and an email listing from the last business study we conducted in 2015. In addition to the online surveying we also engaged a telephone interviewer to follow up individual businesses on the various lists and we employed a face-to-face interviewer to walk Brighton Road through to Seacliff handing out paper-based surveys or offering to complete them on iPad. Our interviewer returned several days later to collect any paper-based surveys that were completed. The fieldwork did take several weeks to complete but was completed on 16<sup>th</sup> November, 2017.

The Australian Chamber of Commerce used to produce a national business survey several times a year but they no longer do this so we accessed the Sensis Business Survey and have compared the local results to that of greater Adelaide and Australia-wide rather than using the NAB Business Confidence Survey previously indicated because the Sensis study was much easier to compare.

### *Background to the brief*

The City of Holdfast Bay conducted a survey of businesses in 2015 to ascertain current and forecast levels of business confidence and opinions on how Council can help support business conditions. The Strategic Planning Unit of Council would like to conduct this survey again as soon as possible following the re-development of Jetty Road.

### *Project Scope*

- Develop a refined business questionnaire that is compatible with a state and national business confidence study.
- Conduct a survey, achieving responses from 330 businesses operating in the wider Council area and not just Jetty Road Glenelg.
- Collate all data and provide results measured against the national framework.
- 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).



## 2. MARKET RESEARCH OBJECTIVES

Specific objectives for the Business Survey include:

- Ascertain current and forecast level of business confidence amongst a total of 330 Council area businesses and service providers and align the survey results with a statewide and national Business Survey. Determine businesses expectations for the economy in the future.
- Seek opinions on how the City of Holdfast Bay can develop strategies that will support business conditions.
- Determine level of NBN connection and satisfaction with the service.
- Determine the number of businesses that are transacting online and businesses levels of investment in eCommerce.
- Determine the level of importance of intrastate, interstate and international visitors have on various businesses in the area.
- Determine what business issues are most prevalent in the local marketplace.
- Determine what the barriers are to taking on new employees.
- Determine attitudes to profitability in the retail sector and in general what factors are impacting on profitability in all sectors.
- Determine what levels of stock holding is taking place in comparison to the previous year and why.
- Determine degree of business done with Council and satisfaction amongst those who have conducted business with Council.
- Determine level of Council support for business in the area.
- Where possible gather contact details for future business studies in the area.
- Determine general demographics of the businesses in the area.



# City of Holdfast Bay Business Survey Snapshot

## Who did we survey?



**34%**  
Retail



**22%**  
Accommodation,  
Food Service



**89%** Small Business  
**50%** <\$500k

**15 yrs**  
average  
time in  
business

## What did they tell us?



**4%**  
connected  
to NBN



**25%** transact online  
**44%** investing in  
digital platforms



### Importance of Visitors

Intrastate **7.5/10**  
Interstate **5.2/10**  
International **3.7/10**

Expectations for the national economy are slightly higher when compared to the SA economy and the local economy.  
State expectations are weaker when compared to the national and local economy.

## Local economy expectations

**19%**  
Stronger

**49%**  
Same

**31.5%**  
Weaker



**Selling prices**  
only positive KPI



**Seasonality brings optimism for Q4**  
Total sales/revenue, export sales, selling prices, profitability & investment in eCommerce all positive



**53% feel confident**



**24% feel worried**  
Medium sized and accommodation and food services more so





### Problems and concerns

- costs or overheads
- economic climate
- lack of work or sales
- cash flow, bad debts or profitability



### Barriers to hiring

1/3rd - don't need more staff  
2/3rds - cost, lack of work/sales, finding quality staff and profitability prohibit hiring

### Profitability



**75%**  
think there is a decline in retail profitability



**Power costs**  
most prominent factor affecting profitability  
+  
cost of labour, cost of rent, lack of sales and low margins

### Holding Stock

**15%**

More

**64%**

Same

**21%**

Less

The main reason for more stock is summer and Christmas.  
Reason for less stock is cash flow, the economy or reduction in workloads.

### Relationship with Council

**19%**

Conducted business with Council in last 12 months

**7.3**

Rating the experience

**5.2**

Rating satisfaction with Council's support for business

### Strategies to support better business conditions

Parking, traffic, better marketing (advertising, business networking events, promotions and festivals), generally supporting business better, promoting the region as a destination, Council related comments (liaise more, less business disruption), reducing costs (power, rates, and rent).



## 4. EXECUTIVE SUMMARY

The majority of businesses surveyed were retail or accommodation and food services (56% of the total) but with a good representation by health care and social assistance (10%) and professional, scientific and technical (8%) and smaller representation amongst the other industry sectors. The average length of time in business in the area for this sample was 15 years with an even spread of length of time in business spanning 0 to 150 years. The majority of businesses were small (89%, employing less than 20 people) but with 11% classified as medium sized businesses employing 20-149 people. There were no large businesses employing over 200 people in the sample.

Half of all businesses surveyed have an annual turnover of less than \$500,000, 22% turnover \$500,000-\$1 million pa, 8% \$1-\$2 million pa, and 8.5% \$2-\$5million. 2% have a turnover of more than \$5 million-\$50 million pa. There were no businesses with a turnover of more than \$50 million pa. The employment ratio shows more females than males employed, and considerably more skilled workers to unskilled but the ratio between full and part time is equal.

### *NBN Connection*

Only 4% of all businesses surveyed claimed to be connected to the NBN although another 4.5% were not sure. Those who were connected were asked to rate their satisfaction with the migration process to the NBN and this was rated at 6 out of 10. They were also asked to rate their satisfaction with the internet connection and this was rated lower at 5.5 out of 10. People were asked why they rated their satisfaction the way they did and only two of the total 12 businesses were happy with the NBN whilst most of the others complained of issues including poor internet speeds and regular drop outs.

### *Businesses transacting online and eCommerce*

Only a quarter of businesses say they are transacting online and these businesses were more likely to be retail or accommodation and food services.

44% of all businesses surveyed claim to be investing in eCommerce or digital platforms to aid business transactions. Those more likely to be investing are not the food services or retail enterprises rather they are medium sized businesses in the transport, postal and warehousing; rental, hiring and real estate services; professional, scientific and technical; construction; manufacturing and administrative and support services sectors.

### *Importance of visitors to local businesses*

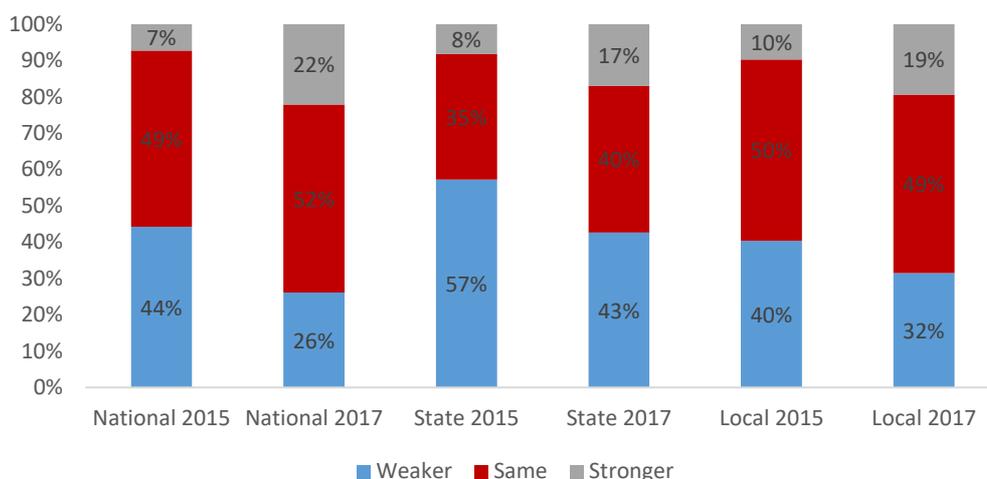
Intrastate visitors are rated more highly at 7.5 out of 10, followed by interstate visitors at 5.2 out of 10 and international visitors at only 3.7 out of 10. Those rating all visitors higher are predictably those in retail and accommodation and food services. We also assume intrastate visitors are more attractive because of their repeat visitation to the area.

### *Expectations for economic performance in the next 12 months*

Expectations are slightly higher for the national economy over the next 12 months when compared to the South Australian economy and the local Council area economy. The State economy expectations are weaker when compared to the national and local Council area economies. The local economy expectations show 19.4% of businesses expect it to be stronger, 49% expect it to remain the same and 31.5% expect it to be weaker.



Comparison of region economy expectations 2015 v 2017



When we compare the results from the 2015 City of Holdfast Bay Business Survey that we conducted for Council, economic expectations have improved substantially. Most notably optimism in the local area has increased from 10% to 19%.

#### *Business KPIs for Q3 compared to expectations for Q4 in 2017*

Of a total of 12 business KPIs only one in Q3 indexed positively and that is selling prices. This is in stark contrast to businesses State-wide or nationally that showed considerably more positivity across a broader range of KPIs.

The expectations for Q4 are much more optimistic presumably because of seasonality with general business conditions, total sales/revenue, export sales, selling prices, profitability, and investment in eCommerce all expected to be positive. National and State-wide expectations are all more positive however for Q4 in 2017 so local businesses remain slightly more pessimistic.

KPI	Q4 2014	Q4 2017	
General business conditions	42.0	55.3	↑
Total sales/revenue	43.8	57.61	↑
Average wages	62.3	61.23	-
Non-wage labour costs	68.6	63.2	↑
Selling prices	53.6	54.9	-
Profitability	36.7	50.2	↑
Number of employees	45.4	51.4	↑
Overtime worked	44.8	54.7	↑
Investment in buildings and structures	43.2	44.9	-
Investment in plant and equipment	49.3	46.9	↓

Comparing the two same periods from 2014 and 2017 considering the importance of seasonality, the above chart shows improvements in many of the KPIs over the past 3 years for local businesses. The only positive in 2014 was selling prices and now we see general business conditions, total sales, selling prices, profitability and number of employees.



### ***Business confidence***

53% of local businesses report feeling confident about their prospects for the year ahead with 24% feeling worried. Confidence is down compared to the national index and the level of worry is considerably higher with local medium sized businesses in the local area expressing far more worry than small business.

The sector showing the greater worry locally is accommodation and food services whilst retail is on par with national figures.

### ***Prime business concerns***

There are four issues local businesses say they are facing with costs or overheads being the most dominant, followed by economic climate, lack of work or sales and cash flow, bad debts or profitability. Only 9% of businesses in the local area said they had no problems at the moment. These prime concerns are the same for businesses nationally.

### ***Barriers to hiring new staff***

One third of all local businesses said they do not need any more staff but of the other two thirds cost of employing, lack of work/sales, finding suitable/quality staff and profitability are all barriers for local businesses to hire more staff.

### ***Retail sector profitability***

Three quarters of all businesses believe that profitability is declining in the retail sector at the moment with the accommodation and food services; rental, hiring and real estate services; information, media and telecommunications and the retail sector more likely to agree than other sectors.

### ***Factors affecting profitability***

Power costs is the most prominent factor affecting profitability followed by the cost of labour, cost of rent, lack of sales and low margins.

### ***Holding stock***

Local businesses were asked if they were holding more, less or about the same stock this year compared to last. 15% said they are holding more, 21% less and 64% the same. The reasons why businesses are holding less is cash flow, the economy or a reduction in workloads. The main reasons why businesses are holding more stock is seasonal, i.e. summer and Christmas. Those businesses that remained the same simply explained that they didn't need to increase or decrease.

### ***Business with Council and rating for support for business***

Only two in ten businesses surveyed claimed to have done business with Council in the last 12 months – 64 businesses. These businesses rated the experience 7.3 out of 10 which equates to a Net Promoter Score of a positive 3.1.

All businesses were asked how satisfied they were with Council's support for business in the area and the average rating was 5.2 out of 10 which equates to a Net Promoter Score of negative 68.8 meaning simply that there were considerably more detractors than promoters. This is an indication that business feel that Council should be doing much more for business in the area than they currently are. Their suggestions included:

- Parking/traffic (44 responses)
- Better marketing (advertising, business networking events, promotions and festivals) (36 responses)
- Generally supporting business better (20 responses)
- Council related comments (liaise more, less business disruption) (21 responses)
- Reducing costs (power, rates and rents) (20 responses)
- Promoting the region as a destination (13 responses)



And there were 2 comments regarding Council doing a good job.

### *Conclusions*

Local businesses are considerably more pessimistic than the whole of Australia. They acutely feel the seasonality of the area but are somewhat optimistic about the summer season coming and the next 12 months although they report downward pressure on profitability due to higher business costs (power, wages, rent, etc.). There is a prevailing attitude that Council should be doing more to help them by way of reduction in costs, better marketing of the area to bring foot traffic including promoting it as a destination and running more events and festivals, and making the area more accessible with better parking. They do not rate the Council highly on its support for business but of those that have done business with Council they rate their dealings with you higher.

There were only a small number of questions that were comparable to the previous study that we ran for Council amongst local businesses in 2014/15. We have compared the results and conclude that business optimism has improved substantially from Q4 2014 to their expectations for Q4 2017.

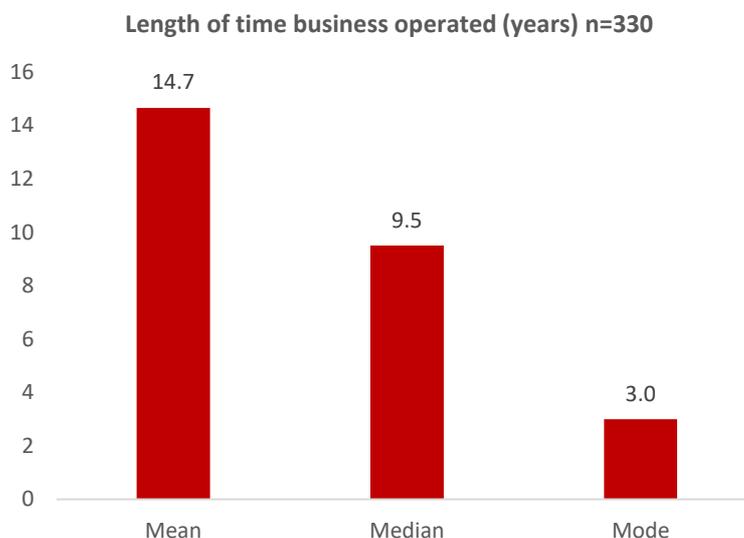
It is widely accepted that the retail sector is suffering from downward trends in profitability even amongst businesses not in retail. The NBN rollout is obviously in its infancy in the area but the signs of satisfaction are not good. eCommerce and online trading is a feature for many businesses and there is a call for support to promote business by Council in the area.

Visitors to the area are important particularly intrastate visitors and there is a call for Council to do more to attract visitors to help business with sales and revenue as a flow on effect.



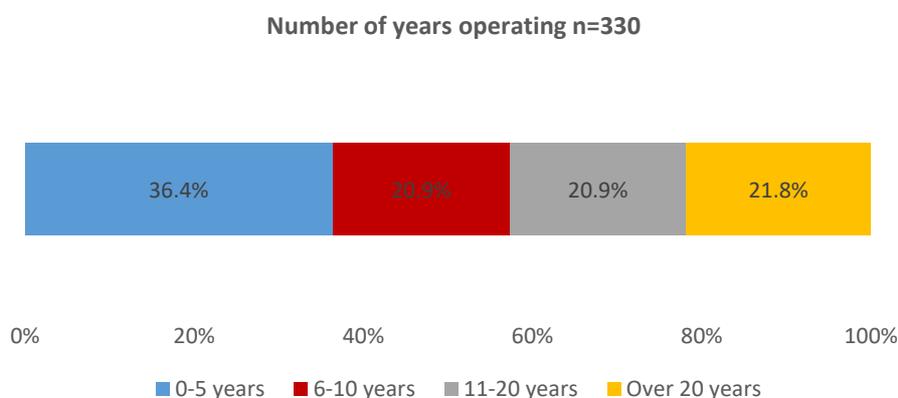
## 5. KEY FINDINGS

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



Respondents were asked to indicate how long their business has operated in the City of Holdfast Bay Council area. Responses ranged from less than one year, through to 150 years. The average number of years was 14.7 years. The median number of years, the number in the middle of the range, was 9.5 years and most commonly nominated number of years (the mode) was 3 years.

Responses were then sorted into groupings for use as a variable to facilitate analysis by years of operation.



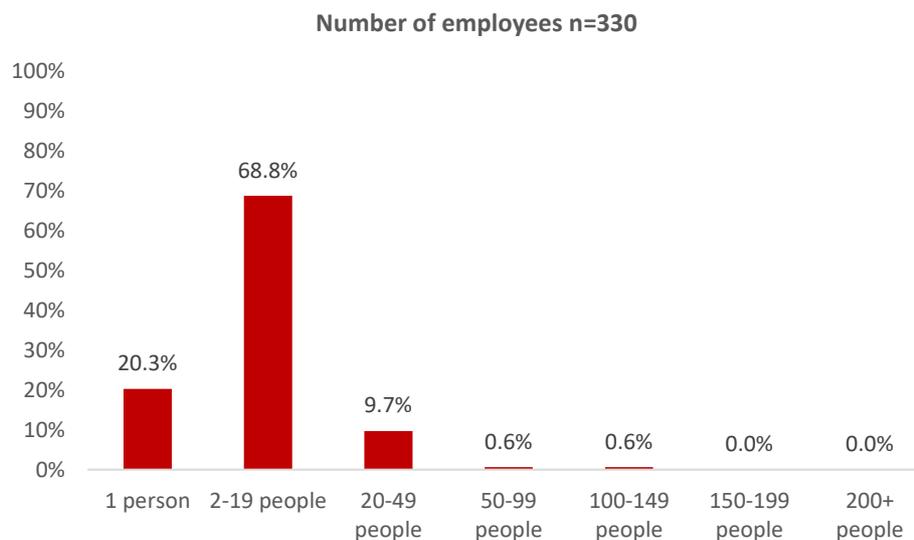
Around four in ten (36%) had operated between 0-5 years, with two in ten (21%) 6-10 years, a further two in ten (21%) 11-20 years and the balance over 20 years (22%).

Businesses more likely to be in operation for between 0-5 years (36%) fell into the Information Media and Telecommunications (61.5%\*) and Professional, Scientific and Technical Services (44%) categories. Medium sized businesses (20-199 employees) were more likely to have been in operation for between 6-10 years (33%) and over 20 years (33%).

\*Small sample size.



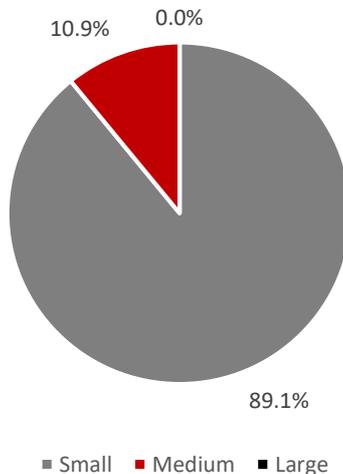
**Q2: How many people (including management and owners) did your business employ in the current quarter (September, 2017)? Single response.**



Respondents were asked to nominate how many people their business employed in the current quarter ending September 2017. The majority (89%) employed less than 20 people which comprised those employing 1 person (20%), and those employing between 2 and 19 people (69%). 10% employed between 20 and 49 people, with less than 1% each employing 50-99 people and 100-149 people. There were no responses for employees over 150.

#### *Size of business*

**Size of business represented n=330**



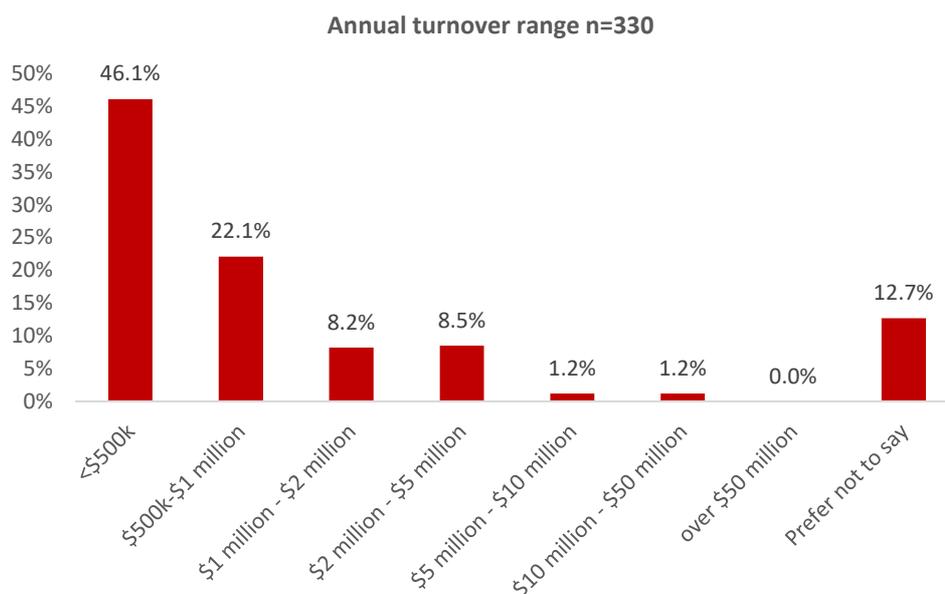
The number of employees categorises the size of a business. Less than 20 employees is classified as small business, 20-199 is classified as medium and 200 and over is classified as large. On this basis, 89% of participants were small, and 11% medium. There were no large businesses interviewed. We have achieved a greater percentage this survey of medium businesses than we did in the previous business survey in 2015. Size of business has been used as a variable for each question where appropriate.



The type of business more likely classified as small or medium in the City of Holdfast Bay is as follows:

Business category	Size of business
Administration and Support Services	Small
Arts and Recreation	Small
Construction	Small
Electricity, Gas, Water and Waste Services	Small
Financial and Insurance Services	Small
Health Care and Social Assistance	Small
Information, Media and Telecommunications	Small
Public Administration and Safety	Small
Rental, Hiring and Real Estate Services	Small
Retail Trade	Small
Transport, Postal and Warehousing	Small
Wholesale Trade	Small
Accommodation and Food Services	Medium
Education and Training	Medium
Manufacturing	Medium
Professional, Scientific and Technical Services	Small and Medium

Q3: What is your annual turnover range? Single response.



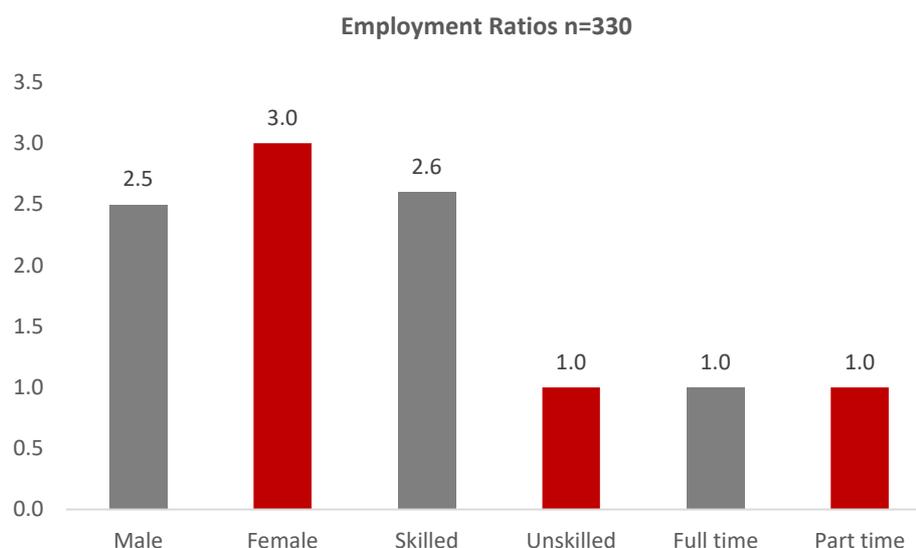
Respondents were asked to nominate their annual turnover range. Just under half claimed to turnover less than \$500,000 pa (46%), 22% claimed \$500,000-\$1 million pa, 8% \$1 million-\$2 million pa, 8.5% \$2 million-\$5million pa, 2% over \$5 million pa (1% each, \$5 million-\$10 million pa, \$10 million-\$50 million pa). None of the participants claimed turnover of over \$50 million. 13% of respondents chose not to reveal their turnover.

Respondents more likely to claim turnover of less than \$500,000 pa (46%) were more likely small business (52%), had been in business for 5 years or less (58%), with business categorised as information media and telecommunications (77%), and retail trade (50%).

Those with a turnover of \$2 million-\$5 million pa (8.5%) were more likely medium sized (50%) and had been in business for longer than 20 years (17%).



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



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

#### Gender

As with the previous survey in 2015, more females are employed within the City of Holdfast Bay, however the gap has closed. Females outnumber males at a ratio of 3:2.5. This ratio previously stood at 3:2 (female/male).

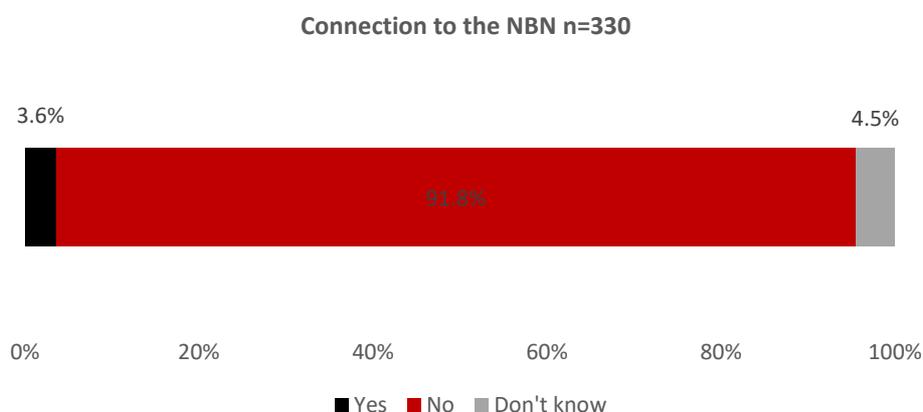
#### Skilled/Unskilled

There are more skilled employees working within the City of Holdfast Bay area with the skilled workforce outnumbering the unskilled workforce at a ratio of 2.6:1. Whilst the previous survey revealed a similar pattern of greater numbers of skilled workers, the gap has declined from the previous ratio of 3.5:1 skilled/unskilled, a possible indicator that more training is required for the majority of employment options.

#### Full time/Part time

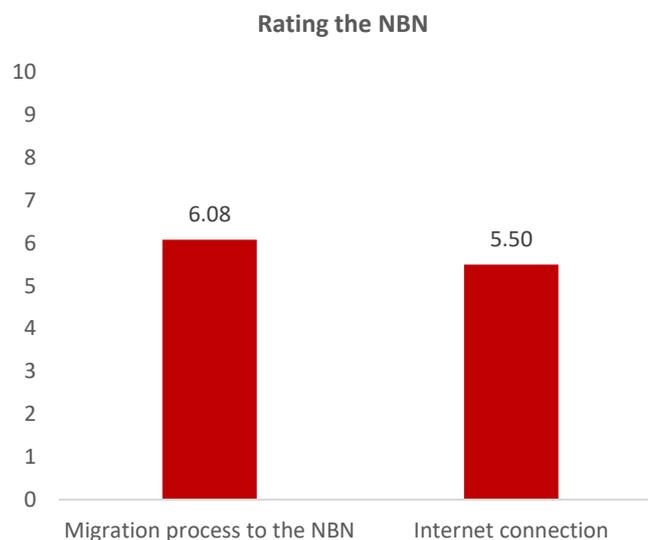
The pattern of full time versus part time employees reveals a ratio of 1:1, a decline on the 2015 survey which revealed a ratio of 1:2 full time/part time.

**Q5: Is your business currently connected to the NBN? Single response.**



All respondents were asked if their business was currently connected to the NBN. The vast majority (92%) claimed it was not, however slightly less than 4% (12 people) claimed that it was and 4.5% did not know or were not sure.

**Q6: On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with the NBN connection?**



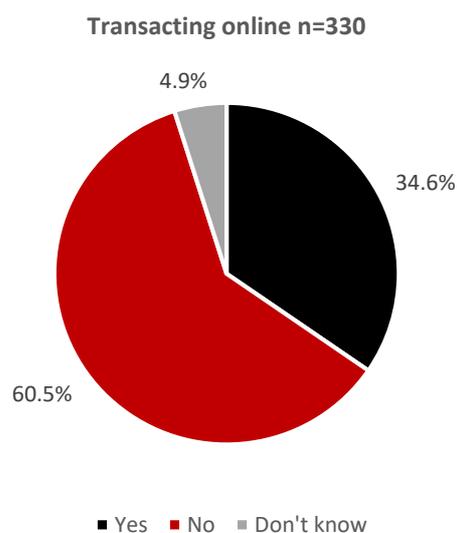
The 12 respondents who had been connected to the NBN were asked how satisfied they were regarding the migration process to the NBN and the subsequent internet connection. Migration process to the NBN rated 6.1 out of 10 and internet connection rated 5.5 out of 10. Application of a Net Promoter Score formula to the ratings reveals significantly negative scores of -77.78 for the migration process and -80 for the internet connection.

**Q7: Why did you rate your NBN migration/connection that way? Open ended.**

Respondents were then asked why they rated their NBN migration and connection the way they had. The comments are detailed below, sorted based on their ratings. Respondents rating highly (8 and over) gave positive comments, stating it is the way of the future and they are happy. Those rating 7 and below gave negative comments which surrounded the difficulties in connecting and the service not living up to expectations being no better than previous.

Migration process to NBN	Internet Connection	Comment
9	10	It is our future!
8	7	Very happy with it
6	7	Whilst the service can be fast, it is often slow and drops out.
6	6	Not given
6	6	Have some issues
6	6	It's average
6	6	I haven't noticed any difference
8	5	No good
6	5	Because it stuffed up my shop alarm as it wasn't compatible & cost me \$500 out of pocket
7	5	Keeps dropping out.... goes slow sometimes
3	2	Migration process was difficult and needed several tech support calls. And internet speeds are poor, less than ADSL2
2	1	It is hopeless



**Q8: Does your business transact online?**

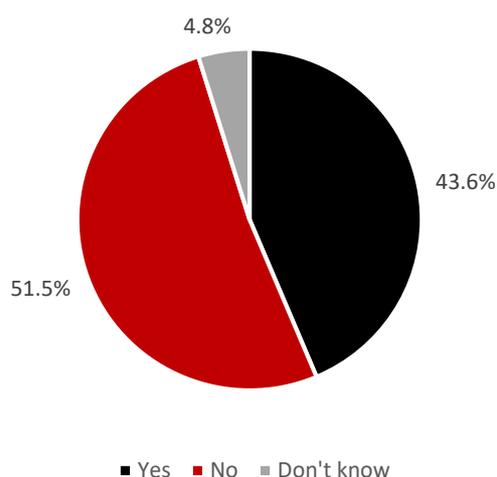
Respondents were asked to indicate if their business transacted online. Six in ten claimed they did not, however 35% did and 5% were not sure.

Those more likely not to transact online (60.5%) had been in business for 6-10 years (64%) and over 20 years (68%), had a turnover of less than \$500,000 pa (76%), and were businesses that operated in the accommodation and food services sector and retail trade. Of those who did transact online (35%), the businesses had been in operation for 5 years or less (40%), were a medium sized operation (40%\*), and had a turnover of between \$500,000 pa and \$5 million (50%).

\*Small sample size.

**Q9: Do you invest in eCommerce or digital platforms to aid business transactions? i.e. buying and selling of goods and services, or transmitting funds or data, primarily using the internet. Single response.**

Investing in eCommerce or digital platforms n=330



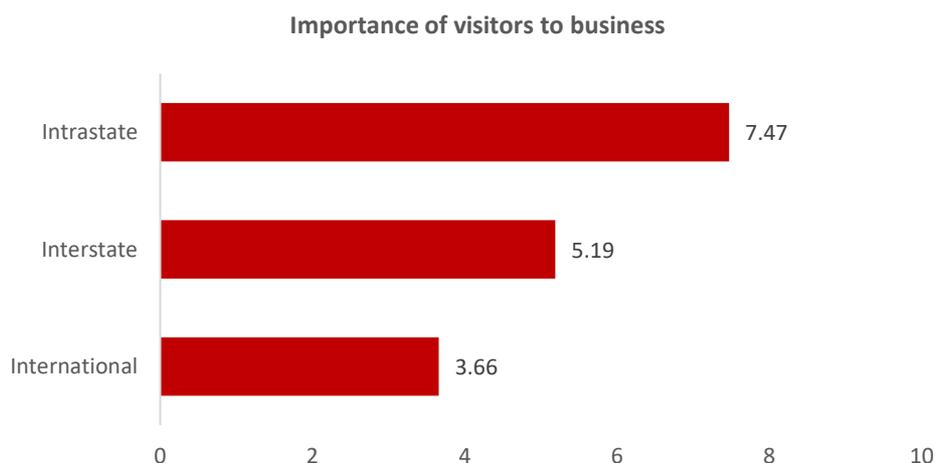
All respondents were asked to nominate if they invested in eCommerce or digital platforms to aid business transactions. Half (51.5%) claimed they did not, however 44% did and 5% did not know.



Those who do not invest (51.5%) were more likely described as having been in business for 6-10 years (59%), with incomes under \$500,000 pa (59%), and in the accommodation and food services sector (64%) and retail trade (57%). Those who were more likely to invest (44%), had been in business for over 20 years (58%), were a medium sized business (47%), with turnover between \$500,000 pa and \$50 million pa (67%), and were from the transport, postal and warehousing (86%\*), rental, hiring and real estate services (54.5%\*), professional, scientific and technical (56%), information media and telecommunications (54%\*), construction (54%\*), manufacturing (50%\*) and administrative and support services (50%\*) sectors.

\*Small sample size.

**Q10: On a scale of 0 to 10, where 0 is totally unimportant and 10 is totally important, how important are intrastate, interstate and international visitors to your business? Rate all 3 options.**



Respondents were asked to rate the importance of intrastate, interstate and international visitors to their business. Intrastate visitors were rated more importantly overall with a rating of 7.5 out of 10, followed by interstate visitors at 5.2 out of 10 and international visitors 3.4 out of 10.

Those rating intrastate visitors higher than the average 7.5 out of 10 were more likely to have been in business for 6-10 years (8.2/10) and over 20 years (7.8/10), medium sized (7.9/10), with turnover between \$1 million pa and \$5 million pa (\$1 million-\$2 million 8/10, \$2 million-\$5 million 7.9/10), and operated in the education and training (10/10), electricity, gas, water and waste services (10/10), wholesale trade (10/10), accommodation and food services (8.6/10), arts and recreation services (8.0/10) and retail trade (7.8/10) industry sectors.

Those rating the importance of intrastate visitors significantly below the average were those who had been in business for less than 5 years (7.1/10), and 11-20 years (6.95/10), with turnover between \$5 million pa and \$50 million pa (\$5 million-\$10 million pa 4.0/10, \$10 million-\$50 million pa 7.25/10), and operated in all remaining industry sectors, specifically construction (4.6/10), financial and insurance sectors (5.8/10), information media and telecommunications (5.9/10), manufacturing (6.3/10), public administration and safety (6.7/10), professional, scientific and technical services (6.9/10), transport, postal and warehousing (7.0/10), administrative and support services (7.1/10), rental hiring and real estate services (7.2/10).

Those rating interstate visitors higher than the average 5.2 out of 10 were more likely to have been in business for 6-10 years (6.0/10) and medium sized businesses (6.4/10), with turnover between \$1 million pa and \$5 million pa (\$1 million-\$2 million 6.2/10, \$2 million-\$5 million 6.3/10), and operated in the wholesale trade (8.3/10), accommodation and food services (6.4/10), retail trade (6.0/10) and information media and telecommunications (5.85/10) industries.

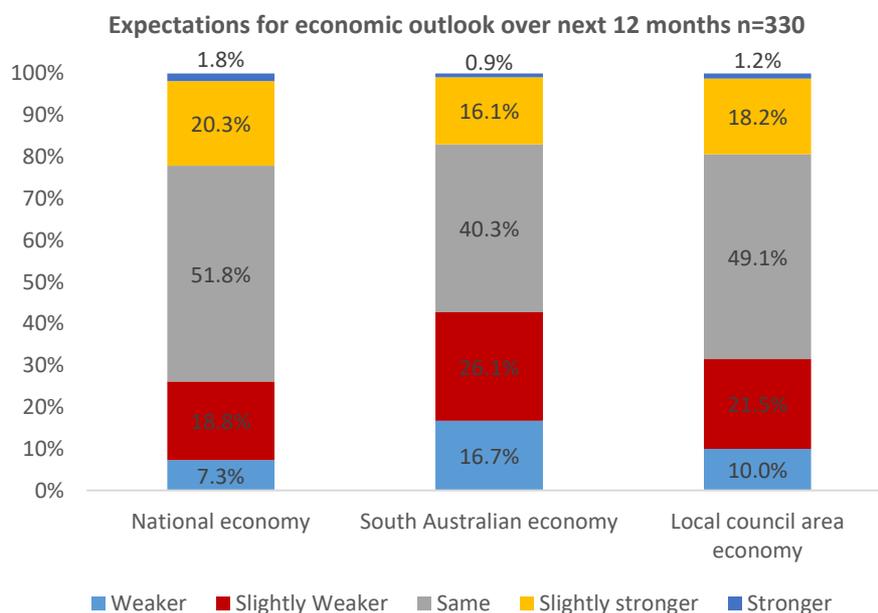


Those rating the importance of interstate visitors significantly below the average were those who had been in business for 5 years or less (4.9/10) and over 20 years (4.9/10), had turnover of less than \$2 million pa (< \$500,000pa 4.7/10, \$500,000 pa-\$1 million pa 5.0/10), and between \$5 million pa and \$50,000 million pa (\$5 million-\$10 million pa 3.5/10, \$10 million-\$50,000 million pa 4.8/10), and operated in electricity, gas, water and waste services (5.0/10), transport, postal and warehousing (4.8/10), rental, hiring and real estate services (4.5/10), arts and recreation services (4.3/100, administrative and support services (4.0/1), manufacturing (3.9/10), financial and insurance services (3.4/10), health care and social assistance (2.6/10), education and training (2.5/10), and construction (1.4/10) industries.

Those rating international visitors higher than the average 3.7 out of 10 were more likely to have been in business for between 6 years and 20 years (6-10 years 4.4/10, 11-20 years 3.9/10), medium sized businesses (5.7/10), with turnover of between \$1 million pa and \$5 million pa (\$1 million-\$2 million pa 4.9/10, \$2 million-\$5 million pa 5.6/10), and operate within the accommodation and food services (5.6/10), wholesale trade (5.3/10) and retail trade (4.2/10) industries.

Those rating the importance of international visitors significantly below the average were those who had been in business for 5 years or less (3.2/10), and over 20 years (3.4/10), small business (3.4/10), with turnover less than \$1 million pa (< \$500,000 pa 3.2/10, \$500,000-\$1 million pa 3.4/10) and \$5 million-\$10 million pa (2/10), and operate within the administrative and support services (3.2/10), professional, scientific and technical services (2.9/10), manufacturing (2.7/10), information media and telecommunications (2.6/10), education and training (2.5/10), transport, postal and warehousing (2.3/10), financial and insurance services (2.3/10), health care and social assistance (1.6/10), electricity, gas, arts and recreation services (1.3/10), public administration and safety (0.7/10), construction (0.3/10), water and waste services (0.0/10),

**Q11: How do you expect the following economies to perform over the next 12 months? Rate all 3 options.**



### National economy

22% of businesses expect the national economy to perform stronger over the next 12 months, just over half think it will perform the same and just over a quarter think it will perform weaker. Compared to the National Sensis Business Index September 2017 findings, national businesses are more optimistic with 31% thinking the national economy will



perform stronger, 54% the same and 15% weaker so expectations are lower amongst businesses in the Council area than the national monitor.

### South Australian economy

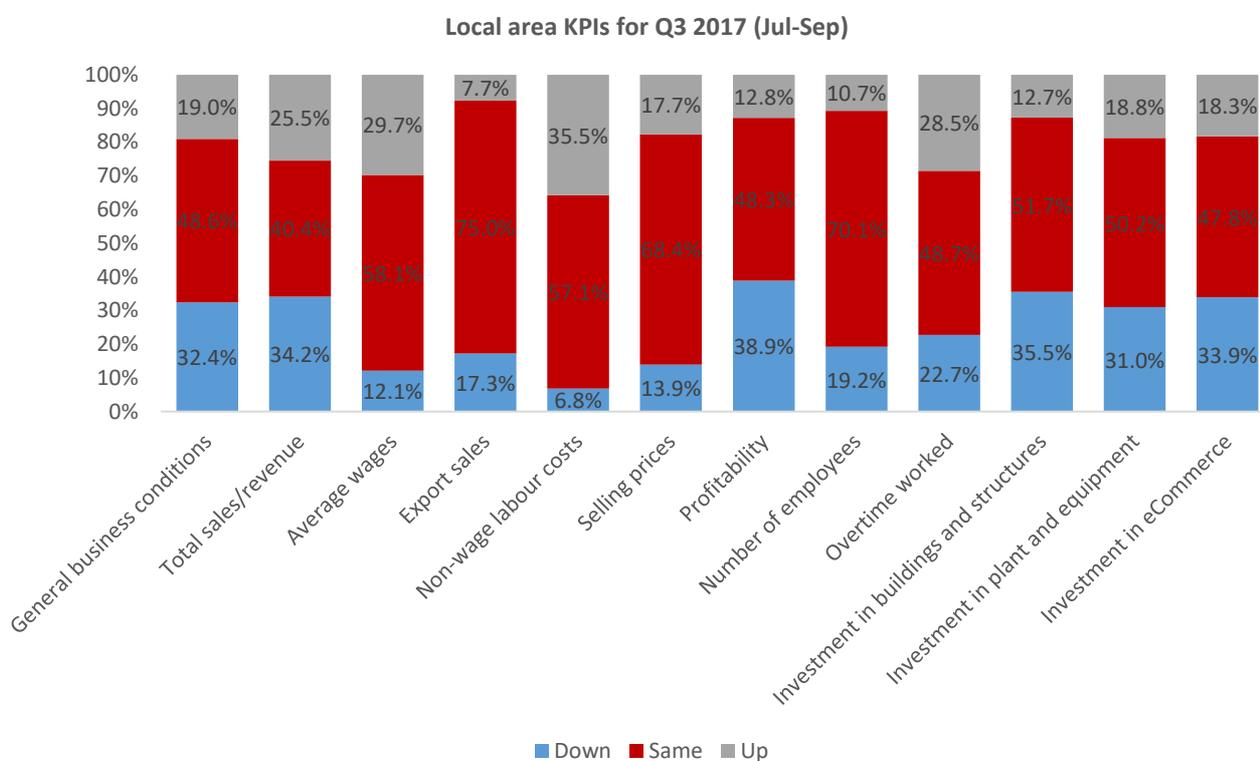
17% of businesses expect the South Australian economy to perform stronger over the next 12 months, four in ten think it will perform the same and just over four in ten think it will perform weaker.

### Local council area economy

19.4% of businesses expect the Local council area economy to perform stronger over the next 12 months, around a half think it will perform the same and just over three in ten think it will perform weaker.

City of Holdfast Bay businesses are less optimistic about the South Australian economy than they are about the national economy and indeed the local Council economy.

**Q12: How would you describe the following business KPIs in the Q3 September quarter of 2017? Were they up, down or about the same as the previous quarter? Rate all KPIs.**



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

	Up	Same	Down	Local Index Q3 2017
<b>General business conditions</b>	19.0%	48.6%	32.4%	43.30
<b>Total sales/revenue</b>	25.5%	40.4%	34.2%	45.65
<b>Average wages</b>	29.7%	58.1%	12.1%	58.79
<b>Export sales</b>	7.7%	75.0%	17.3%	45.19
<b>Non-wage labour costs</b>	35.5%	57.1%	6.8%	64.35
<b>Selling prices</b>	17.7%	68.4%	13.9%	51.90



<b>Profitability</b>	12.8%	48.3%	38.9%	36.92
<b>Number of employees</b>	10.7%	70.1%	19.2%	45.75
<b>Overtime worked</b>	28.5%	48.7%	22.7%	52.89
<b>Investment in buildings and structures</b>	12.7%	51.7%	35.5%	38.61
<b>Investment in plant and equipment</b>	18.8%	50.2%	31.0%	43.86
<b>Investment in eCommerce</b>	18.3%	47.8%	33.9%	42.23

Based on the principals of indexation, the only positive indices is selling prices with more people saying the variable was rising than falling. Profitability is extremely poor, investment is poor, sales/revenue is poor and therefore the general business conditions are poor for businesses operating in the City of Holdfast Bay. We note that businesses were asked to comment on Q3 2017 (winter/spring) which is relevant when we look at their expectations next for the final spring/summer Q4 – this reflects the seasonality for businesses at the City of Holdfast Bay.

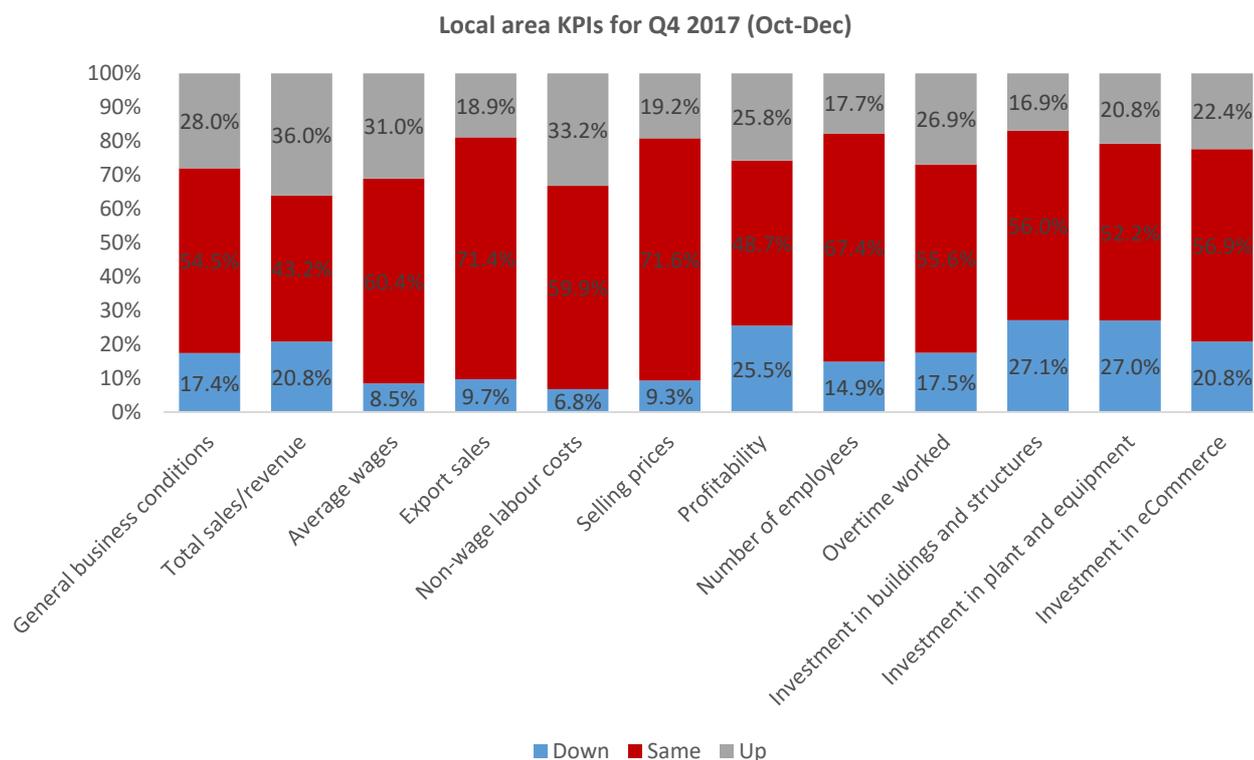
Next we compared the local net balance scores with the State and National net balance scores recorded in the Sensis Business Index September, 2017.

	<b>Local Net Balance</b>	<b>State Net Balance</b>	<b>Nat Net Balance</b>	<b>Local versus Nat</b>
<b>Sales</b>	-9	+5	+5	↓
<b>Employment</b>	-9	+8	+2	↓
<b>Wages</b>	+18	+15	+11	↑
<b>Prices</b>	+4	+18	+18	↓
<b>Profitability</b>	-26	-1	-2	↓

The local businesses are claiming all indices are well below state and national levels.



**Q13: How do you expect the same business KPIs to perform in Q4 of 2017? Will they be up, down or about the same as the previous quarter? Rate all KPIs.**



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

	Up	Same	Down	Local Index Q4 2017
<b>General business conditions</b>	28.0%	54.5%	17.4%	55.30
<b>Total sales/revenue</b>	36.0%	43.2%	20.8%	57.61
<b>Average wages</b>	31.0%	60.4%	8.5%	61.23
<b>Export sales</b>	18.9%	71.4%	9.7%	54.57
<b>Non-wage labour costs</b>	33.2%	59.9%	6.8%	63.19
<b>Selling prices</b>	19.2%	71.6%	9.3%	54.95
<b>Profitability</b>	25.8%	48.7%	25.5%	50.16
<b>Number of employees</b>	17.7%	67.4%	14.9%	51.42
<b>Overtime worked</b>	26.9%	55.6%	17.5%	54.72
<b>Investment in buildings and structures</b>	16.9%	56.0%	27.1%	44.92
<b>Investment in plant and equipment</b>	20.8%	52.2%	27.0%	46.90
<b>Investment in eCommerce</b>	22.4%	56.9%	20.8%	50.78

Based on the principals of indexation, the positive indices based on businesses expectations for the next quarter include general business conditions, total sales/revenue, export sales, selling prices, profitability, and investment in eCommerce. This is surely a reflection of the current and final quarter being seasonally more favourable with businesses expecting things to improve substantially.



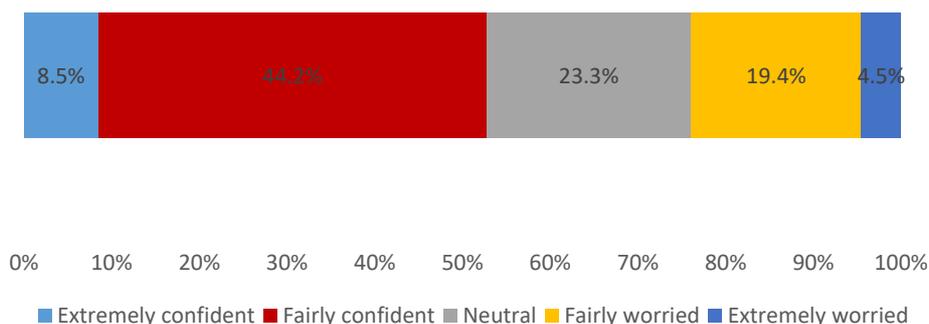
Next we compared the local net balance scores with the State and National net balance scores recorded in the Sensis Business Index September, 2017.

	Local Net Balance	State Net Balance	Nat Net Balance	Local vs Nat
<b>Sales</b>	+15	+7	+20	↓
<b>Employment</b>	+3	+10	+12	↓
<b>Wages</b>	+23	+13	+16	↑
<b>Prices</b>	+10	+23	+21	↓
<b>Profitability</b>	+1	+6	+17	↓

Sales expectations against national figures are relatively comparable, employment expectations are down for the local businesses, wages are expected to be considerably higher in the local area, and both prices and profitability are expected to be considerably lower than the national expectation. In short, the local businesses are more pessimistic than businesses state-wide or nationally.

*Q14: Thinking about the next 12 months, how confident do you feel about your business prospects?*

Business prospects confidence n=330



53% of all businesses reported feeling confident about their prospects for the year ahead with 24% feeling worried. When we look at the Sensis data we can compare to the National confidence levels as follows but other than the net balance score, Sensis did not publish the State confidence and worry percentages:

Confidence level	Local Council Area	South Australia	National
<b>Confident</b>	53%		61%
<b>Worried</b>	24%		15%
<b>Net Balance</b>	+29	+36	+46

The net balance of +29 for local area is well below that of the South Australian and National net confidence levels.



*Confidence by business size compared to national figures represented in brackets*

Confidence level	Confident	Worried	Net Balance
Small business	53% (61%)	22% (15%)	+31 (+46)
Medium business	50% (62%)	42% (24%)	+8 (+38)

Small business show a much greater disparity between confidence and worry than medium businesses with 42% of medium businesses feeling worried.

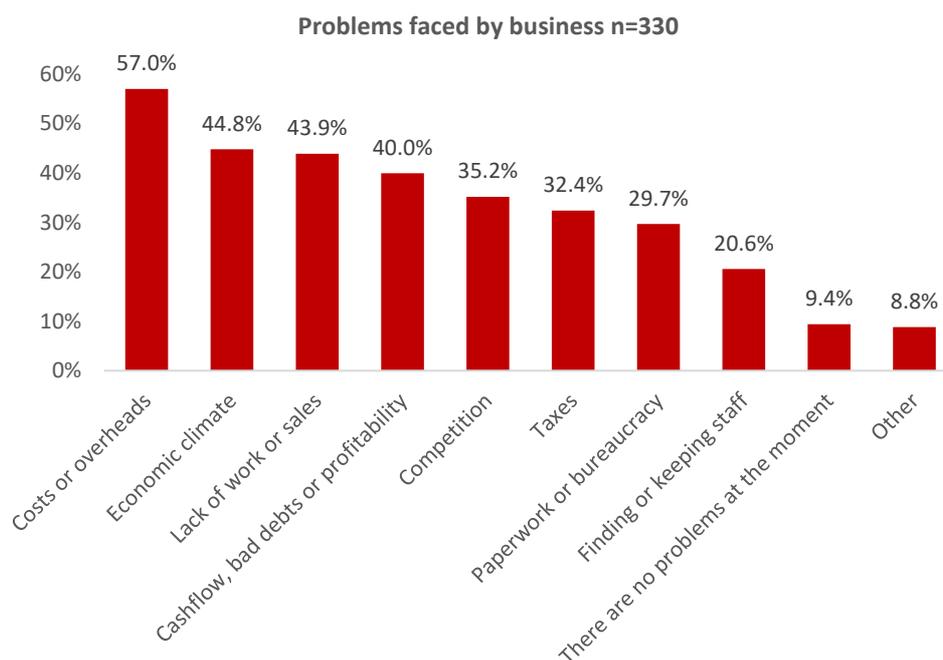
*Confidence by sector compared to national figures represented in brackets*

Confidence level	Confident	Worried	Net Balance
Accommodation and food services	44% (75%)	35% (13%)	+31 (+62)
Administrative and support services	80%	10%	+8
Arts and Recreation services	33%	0%	+33
Construction	54% (57%)	15% (14%)	+39 (+43)
Education and training	100%	0%	+100
Electricity, gas, water and waste services	100%	0%	+100
Financial and insurance services	44% (50%)	0% (10%)	+44 (+40)
Health care and social assistance	59% (66%)	25% (12%)	+34 (+54)
Information, media and telecommunications	69%	15%	+54
Manufacturing	83% (59%)	8% (23%)	+75 (+36)
Professional, scientific and technical services	59%	4%	+55
Public administration and safety	67%	0%	+67
Rental, hiring and real estate services	55%	18%	+37
Retail trade	49% (43%)	29% (27%)	+20 (+16)
Transport, postal and warehousing	0% (64%)	57% (13%)	-57 (+51)
Wholesale trade	67% (55%)	33% (19%)	+34 (+36)

Confidence levels in the Council area are higher for financial and insurance services and manufacturing and retail and wholesale trade is relatively comparable to national figures.



**Q15: As far as business is concerned, what problems, if any, are you facing at the moment? Multiple response.**



All respondents were asked to nominate what problems, if any, their business was facing at the moment. Nearly six in ten (57%) claimed costs or overheads, followed by economic climate (45%), lack of work or sales (44%), cash flow, bad debts or profitability (40%), competition (35%), taxes (32%), paperwork or bureaucracy (30%), finding or keeping staff (21%), with 8% giving other mixed responses. Of the sample, 9% claimed that there are no problems at the moment.

There were 29 other responses which have been further divided into the subsets of local Council area issues and mainly surround parking issues and Jetty Road infrastructure, State/Federal government issues which related to the cost of power, taxes and the NBN and a range of general business issues related to foot traffic, support from banks, overseas competition, seasonal influences, needing more space and improving technology.

#### **Local area Council issues**

Car parking for clients

Customers unable to park due to short term car parks not monitored by parking inspectors

Further reduction of street parking and reduction of free parking

Jetty road looks worn out! Infrastructure is tired

Cost of car parking and public perception of car parking in the Glenelg area

Parking - Limited to 2 hours - not enough to generate time for selections

Parking space

#### **State/Federal Government issues**

Cost of power

Electricity hikes

Government funding and NDIS

Lack on fast internet in my location

NBN roll out has affected my business greatly- with the push back we are losing sales

Payroll tax

Poor economy in SA, anti-business attitude of state government and councils

Power costs



Slow internet

We need NBN to operate more effective between sites

### General business issues

Exposure

Flow, fewer people on the street compare to last couple of years

Having to contend with overseas business influence.

Knowledge of Chinese market to attract more visitors to Glenelg

Lack of funding

Lack of foot traffic to marina; lack of promotion and innovation;

Lack of foot traffic in Jetty Road

Need more space.

Obtaining credit support from banks

Old technology

Winter

Respondents more likely to be affected by costs or overheads (57%) were described as having been in business for over 20 years (71%), medium sized (83%), with turnover of \$500,000-\$1 million pa (67%) and \$2 million-\$5 million pa (75%), and operated in the accommodation and food services (75%), manufacturing (75%\*), construction (62%\*) and retail trade (61%) sectors.

Those more likely to nominate economic climate (45%) were businesses that had operated for 6-10 years (52%) and over 20 years (61%), medium sized (53%), with turnover of \$2million-\$5million pa (61%), and operated in the retail trade (54%) and accommodation and food service (50%) industries.

Lack of work or sales (44%) was more likely to affect those who had been in business for less than 10 years (51%), those generating turnover of less than \$500,000 pa (53%), and those operating in accommodation and food services (56%) and retail trade (53%) industries.

Cash flow, bad debts or profitability (40%) was greater amongst those respondents who had been in operation for between 6 years and 20 years (6-10 years 52%, 11-20 years 45%), those generating less than \$500,000pa in turnover (50%) and operating in the accommodation and food services (54%) and retail trade (45%) arenas.

Respondents more likely to nominate competition (35%) were those who had been operating for between 6 years and 20 years (41%), medium sized (50%), with turnover \$500,000-\$1 million pa (40%) and \$2 million-\$5 million pa (46%), and operate in the accommodation and food services (53%) and health care and social assistance (53%) sectors.

Taxes (32%) generated higher responses amongst those described as having been in business for between 11 years and 20 years (41%), with turnover between \$500,000pa and \$5 million pa (39%), and operating in the professional, scientific and technical (41%) and accommodation and food services (36%).

Those more likely to cite paperwork or bureaucracy (30%) as an issue were described as having been in business for over 11 years (43%), medium sized (44%), with turnover between \$1 million pa and \$5 million pa (36%), and operating in the manufacturing (41%) and accommodation and food services (36%) sectors.

Finding or keeping staff (21%) was more pronounced amongst those who had been in business for 6-10 years (26%), medium sized (36%), with turnover of \$1 million-\$2 million pa (44%), and in the accommodation and food services sector (39%).

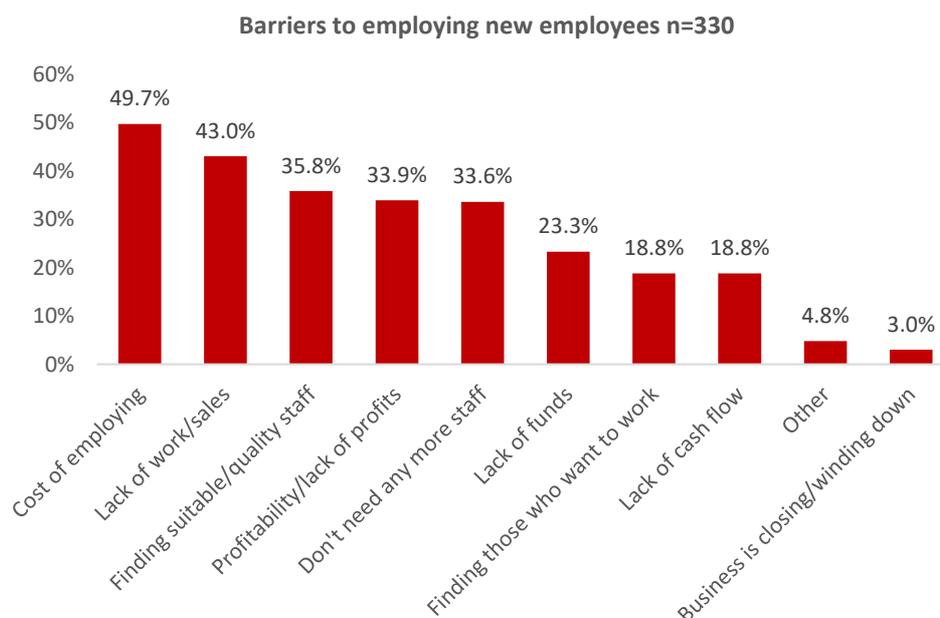


Sample too small to analyse further.

### *Comparison of problems faced by business against national figures*

Local businesses face the same prime concerns as businesses nationally. Nationally the biggest issue is lack of work or sales, followed by finding or keeping staff, cash flow, bad debts or profitability and competition all feature strongly – all issues faced by local businesses in the City of Holdfast Bay. The issues that are more paramount locally are costs and overheads and the economic climate.

### *Q16: What are the barriers to taking on new employees? Multiple response.*



All respondents were asked to indicate what barriers existed for taking on new employees. Multiple responses were permitted. Nationally the most prominent barrier is lack of work/sales which is the same for local businesses along with the cost of employing people.

Half of the respondents claimed the cost of employing (50%), followed by lack of work/sales (43%), finding suitable/quality staff (36%), profitability/lack of profits (34%), don't need any more staff (34%), lack of funds (23%), finding those who want to work (19%), lack of cash flow (19%), other mixed reasons (5%) and business is closing, winding down (3%). The other responses (5%, 16 people) comprised:

- Cost of training and retaining those skills, lack of specific experience
- Council red tape and petty bureaucracy
- Enough for myself
- Finding qualified people
- I don't employ anyone
- Don't know
- Lack of EBA's
- Lack of office space (2 responses)
- No barriers
- No desire to take on new employees
- Seasonally - warm weather equals good sales and need team members
- Sole trader. Can't take on employees under this business model.
- Taxes and paperwork



We are only a small contract business and would not be taking on new employees.

Respondents more likely to nominate the cost of employing (50%) as a barrier to taking on new employees were described as having been in business for 6-10 years (58%) and over 20 years (56%), medium sized (67%), with \$500,000-\$1 million pa turnover (58%), and operating in the accommodation and food services (58%) and retail trade (53%) sectors.

Those more likely to claim a lack of work/sales (43%) had been in business for 6-10 years (59%), medium sized (47%), with turnover of less than \$500,000pa (50%) and \$2 million-\$5million pa (50%), and those operating in the retail trade (54.5%) and accommodation and food services (47%) sectors.

Finding suitable/quality staff (36%) had a greater impact on businesses operating for over 20 years (43%), medium sized (44%), with turnover between \$1 million pa and \$10 million pa (58%), and operating in the professional, scientific and technical services (44%), accommodation and food services (43%) and health care and social assistance (41%) sectors.

Profitability/lack of profits (34%) was cited more often by those who had been in business for 6-10 years (49%), with turnover of less than \$500,000pa (42%), and operating in the retail trade (39%) and accommodation and food services (39%) sectors.

Respondents more likely to claim that they don't need any more staff (34%) had been in business 11-20 years (45%), and are operating in the health care and social assistance (41%), information media and telecommunications (46%\*) and manufacturing (50%\*) sectors.

Lack of funds (23%) had a greater impact on those who had been in business for 6-10 years (38%), with turnover of less than \$500,000pa (31%), and operating in the retail trade sector (29.5%).

Finding those who want to work (19%) showed higher responses amongst those described as having been in business for 6-10 years (27.5%) and over 20 years (26%), medium sized (36%), with turnover between \$1 million pa and \$5 million pa (27%), and operating in the retail trade sector (31%).

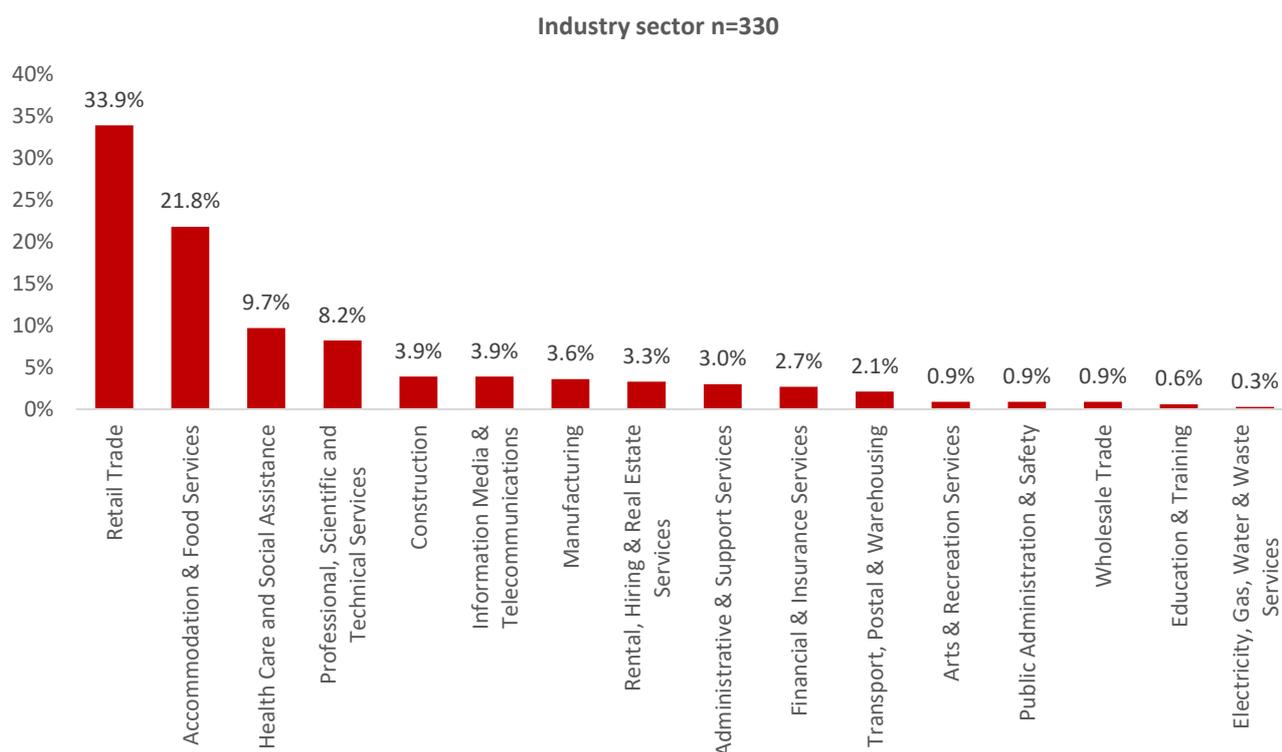
Those more likely to nominate lack of cash flow (19%) had been in business for 6-10 years (26%), with turnover of less than \$500,000pa (27%), and conducting business in the accommodation and food services (22%) and health care and social assistance (28%\*) sectors.

Remaining sample too small to analyse further.

\*Small sample size.



**Q17: What industry sector do you fall into? Single response.**



All of the industry sectors were represented with a third (34%) from retail trade, followed by accommodation and food services (22%), health care and social assistance (10%), professional, scientific and technical services (8%). Smaller allocations were attributed to construction (4%), manufacturing (4%), rental, hiring and real estate services (3%), administration and support services (3%), financial and insurance services (3%) and less than 1% for arts and recreation services, public administration and safety, wholesale trade, education and training and electricity, gas, water and waste services.

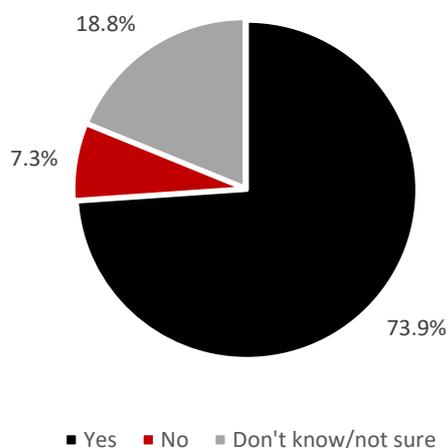
Respondents more likely to fall into the retail trade sector (34%) had operated for over 20 years (43%) and were small businesses (37%). Whereas those in the accommodation and food services sector (22%) were more likely to have been in business for 6-10 years (27.5%), were medium sized (67%), and had a turnover of between \$1 million pa and \$5 million pa (40%). Those in the health care and social assistance arena (10%) were more likely to have been in business for 11-20 years (17%).

Remaining sample too small to analyse further.



**Q18: Do you generally believe that profitability is declining in the retail sector at the moment? Single response.**

**Belief that profitability is in decline in the retail sector N=330**



Three quarters (74%) of respondents claimed that they generally believe that profitability is declining in the retail sector at the moment, with 7% who claim that they did not think this was the case and 19% who did not know.

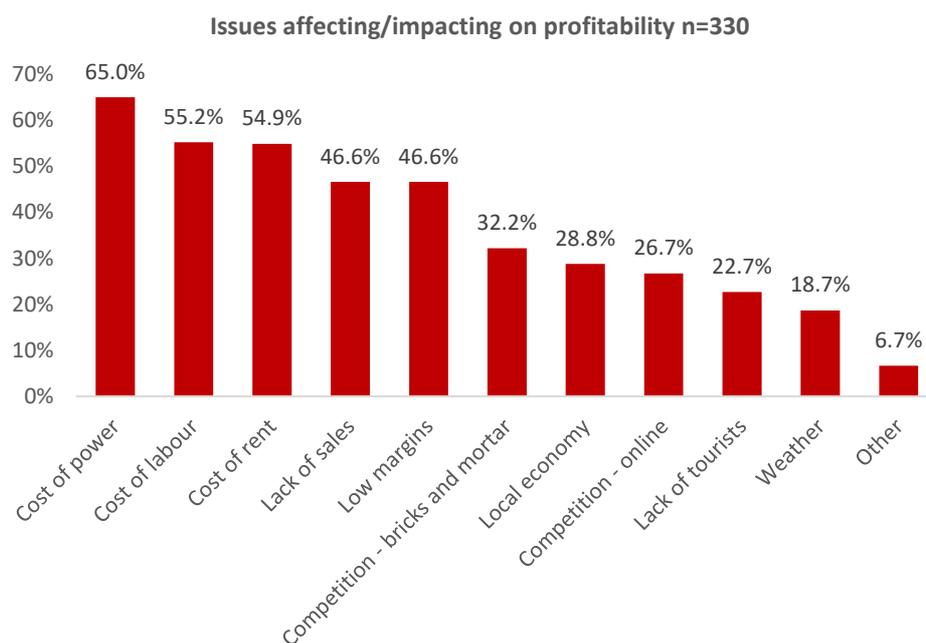
Those more likely to believe that profitability is declining (74%) were described as having been in business for over 5 years (79%), were medium sized businesses (86%), with turnover of \$500,000-\$1 million pa (78%) and \$2 million-\$5 million pa (82%), and those operating in the accommodation and food services (82%), rental, hiring and real estate services (82%\*), retail trade (78%) and information media and telecommunications (77%) sectors.

Those who did not know (19%) were more likely to have been operating for less than 5 years (26%), and fell into the health care and social assistance sector (31%).

Remaining sample too small to analyse further.



**Q19: Are any of the following affecting/impacting on your profitability? Multiple response.**



When asked what issues affected or impacted on profitability, two thirds (65%) of respondents claimed the cost of power, followed by cost of labour (55%), cost of rent (55%), lack of sales (47%), low margins (47%), competition from bricks and mortar establishments (32%), the local economy (29%), competition online (27%), lack of tourists (23%) and the weather (19%). 7% of respondents gave other responses and whilst 6 people out of the 22 respondents claimed there was nothing, the remainder claimed lack of parking (3 responses), cash flow and outstanding invoices (2 responses), lack of funding/no increase in funding (2 responses), cost of materials (aluminium) and low productivity, cost of airline flights, increases to health fund and insurance costs, government red tape at all levels, overheads such as rates and taxes, start-up costs for new business, impact of power outages (of which there were 6 in 2017), and the lack of customers as a result of vacancies in the area.

The cost of power (65%) had a greater impact on those who had been in business for over 20 years (79%), who were medium sized (81%), and generating turnover of between \$500,000 pa and \$5 million pa (73%), and operating in the accommodation and food services (82%) and manufacturing (75%\*) sectors.

Respondents more likely to nominate cost of labour (55%) were described as having been in business for 6-10 years (58%), and medium sized (72%), with turnover of between \$500,000 pa and \$5 million pa (70%), and operating in the accommodation and food services (79%) and manufacturing (67%) sectors.

The cost of rent (55%) was nominated more often by those who had been in business for 6-10 years (67%), medium sized businesses (58%), with turnover of \$2 million-\$5 million pa (61%), and operating in the accommodation and food services (79%) sector and retail trade (63%) sectors.

Those more likely to claim lack of sales as an impact on their business (47%) had been in business for 6-10 years (61%), had a turnover of less than \$500,000 pa (56%), and operated in the accommodation and food services sector (58%) and retail trade (55%).

Low margins affected 47% and these were more likely those who had been in business for between 6 years and 20 years (51%), were medium sized (56%), with turnover of less than \$500,000 pa (50%) and \$2 million-\$5 million pa (50%), were in the construction (61.5%\*) and accommodation and food services (61%) sectors.



Those more likely to be concerned about competition from bricks and mortar establishments (32%) were described as having been in business for 6-10 years (39%), with turnover of less than \$500,000 pa (36%), in the accommodation and food services (49%) and retail trade sectors (39%).

The local economy (29%) is more likely to affect and impact businesses that have been operating for 11-20 years (41%), and those that are medium sized (36%), with turnover of \$1 million-\$2 million pa (33%\*).

Competition from online business (27%) is more likely to affect businesses over 20 years old (32%), those with turnover of \$500,000-\$1 million pa (32%), and those in the retail trade (35%) and health care and social services (31%) sectors.

Those more likely to nominate a lack of tourists (23%) as an issue affecting or impacting their business were described as having been in business for between 6 years and 20 years (6-10 years 36%, 11-20 years 26%), and operating in the accommodation and food services (39%) and retail trade (35%) sectors.

Sample too small to analyse further.

\*Small sample size

*Q20: In terms of your holding stock, is it down, up or the same as it was at this time last year? Single response.*



This question was not applicable to around a third (31.5%) of respondents. Of the remaining sample (226 people), nearly two thirds (64%) were experiencing the same stock levels as last year, with 21% claiming they were down and 15% indicating they were up.

Those more likely to claim that stock levels were down (21%) were described as having been in business for over 20 years, with turnover between \$500,000 pa and \$2 million pa (26%), and operating in the retail trade sector (26%).

Those more likely to claim that stock levels were up (15%) were described as having been in business for less than 10 years (19%), had a turnover of \$500,000-\$1 million pa (22%), and operating within the retail trade sector (24%).

Respondents who nominated that their stock levels were the same (64%) were more likely described as having been in business for 11-20 years (77%), medium sized (68%), with turnover between \$1 million pa and \$5 million pa (68%), and fell into the professional, scientific and technical services (91%), health care and social assistance (75%), manufacturing (75%\*) and accommodation and food services (74.5%) sectors.

*Q21: Why did you answer this way? Open ended.*

The actual comments can be found in the tabulations section of the report.



**Down**

36 people gave a response as to why their stock levels were down against the same time last year, most of which surrounding cash flow, the economy not being as strong as previous and workloads reducing.

**Same**

79 people claimed that stock levels were the same with many of the respondents not elaborating on the reason why stock levels were the same and therefore not giving a reason with others claiming "that it just is". Others indicated that their business didn't support additional stock levels and they had to work at keeping it at a certain level, or because business conditions are the same, stock remains at the same level.

**Up**

32 people claimed that stock levels were up against the same time as last year. These responses mostly centred on the economy and time of the year leading up to Christmas and summer. Other comments were diverse ranging from building the business (reputation, rebranding, borrowing to hold more, and keeping up with competition). There was one comment that related to a business downturn that resulted in more stock holding.

**Q22: Have you done any business with Council in the last 12 months?**

Of the total sample, 19% had done business with Council in the last 12 months, with 81% who had not.

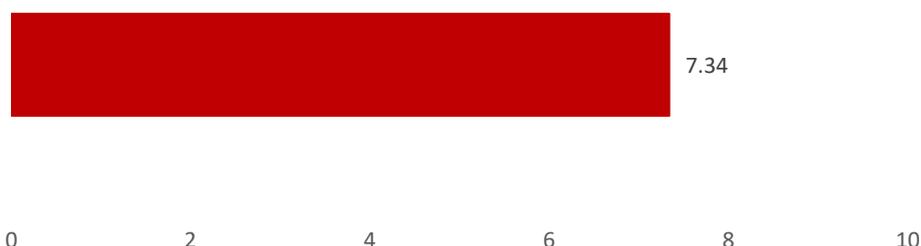


Respondents more likely to have done business with Council (19%) were described as having operated for over 20 years (28%), with turnover between \$1 million and \$5 million (29%), and operating in the retail trade sector (22%).

Those who had not (81%) were more likely to be in business for 6-10 years (84%), with turnover of less than \$500,000 pa (86%), and operating in the construction (92%), health care and social assistance (87.5%), professional, scientific and technical services (85%), and information media and telecommunications (85%) sectors.

**Q23: On a scale of 0 to 10, where 0 is poor and 10 is excellent, how would you rate your experience in doing business with Council? Single rating.**

How would you rate your experience with doing business with Council n=64



Respondents who had dealt with Council were asked to rate their experience in doing business with Council on a scale of 0 to 10, where 0 is poor and 10 is excellent. On average, doing business with Council was rated 7.3 out of 10.

A net promoter score formula has been applied to the mean score which reveals that the experience of doing business with Council scored positive 3.12. Whilst the score is positive, it is extremely low indicating that there are only slightly

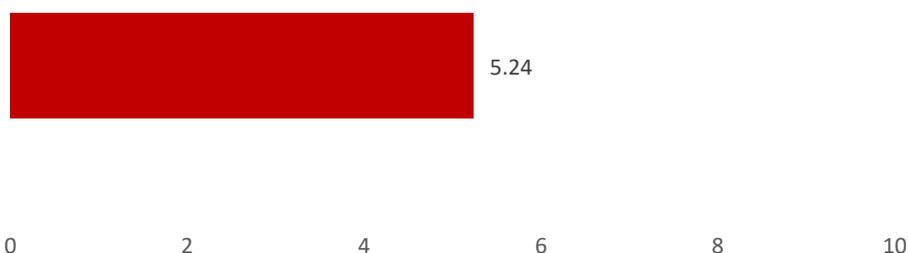


more scoring in the positive sector of 9 and 10 than those in the negative range of 0-6. A third of the respondents are passive, indicating that their experience was mediocre.



**Q24: On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with Council's support for business in the area? Single rating.**

How satisfied are you with Council's support for business in the area? n=330



All respondents were asked how satisfied they were with Council's support for business in the area on a scale of 0 to 10 where 0 was totally dissatisfied and 10 totally satisfied. On average respondents rated their satisfaction with Council's support of business in the area 5.2 out of 10.

A net promoter score formula has been applied to the mean score which reveals that satisfaction with Council's support is viewed extremely negatively with an NPS of negative 68.79, indicating that the vast majority of respondents are detractors and have provided a score below 6, with very few promoters giving a score of 9 and above.



**Q25: Do you have any suggestions or ideas on what strategies the City of Holdfast Bay can implement to support better business conditions for you? Open ended.**

Of the 330 respondents, 173 chose to decline the offer to leave a comment or make a suggestion. The remaining 157 respondents gave a broad array of comments which have been clustered into the categories of parking and traffic such as more of, more free and longer time (44 responses), various marketing issues such as advertising, business networking events, promotions and festivals (36 comments), offering assistance and support to businesses which straddled some additional marketing ideas such as business hubs and small business events through to lobbying State



Government (20 responses), attracting more people to the area, again within the marketing realm but with specific comments for promoting the region as a destination (13 responses), a range of Council directed comments (21 responses), comments surrounding reducing the cost of or the high costs associated with power, rates and rents (20 responses), other mixed responses (6 responses) and 2 responses for Council is doing a good job. The sorted comments appear below.

### **Parking/traffic**

Allow for more appropriate parking hours for visitors. Encourage staff and managers of Foodland and mall stores to park further away than adjacent streets to the Mall. Perhaps encourage the developers/manager to provide a designated staff carpark in the first place to eliminate the need for regulated street parking instead.

At 240 Brighton Road put a break in the island for north travelling vehicles

Car parks are slowly disappearing. Durham Street, Colley Terrace are examples. Car parking expensive i.e. \$5 for any part of an hour at some parks e.g. next to library

Drive more people into the area with events and reduced parking costs

Ensure more car parking is available i.e. Do not make planning decisions which reduce available car parking

Find that balance between parking and community spaces.

Free car parking, and promotion, as per recent innovations at Henley Sq.

Get rid of the bike path in front of our shops - lower council rates for small business

Give back car parks

Also the parking restrictions at Glenelg. Why paying for parking? And increase time limit on jetty road. This is a family community we should be catering for them. Also look into maintenance of this footpath, which is not level.

Improve parking

It would help to have bike parking on Jetty Road Brighton

Listen to retailers more. Ease off with parking fines. Do not remove parking spaces from main road.

Longer parking available for our customers to lunch, shop, and wander the stores. And because our demographic isn't young the parking needs to be available close by.

Look at parking restrictions

Manage parking better, allow people to get in and out of their driveways (small streets with parking directly opposite driveways.

Monitor parking in the street

More all day roadside parking

More car parking (4 responses)

More footpaths

More free parking

More parking places

Needs more car parking/ATM & public toilets - same complaints all the time

Not a good idea to reduce parking space in Jetty Road as this will affect and decrease traffic flow in the area.

Offer longer times in parking bays located near our branch potentially on Rose Street

Only look at ideas that will increase the number of car parks on Jetty Road Glenelg and maintain them as free, they should be for only 30 to 60 mins max. Refuse to let any further reductions take place. Adelaide is still a city that people take their cars to everything and the places that provide that for people will be the places people will support

Paint over graffiti, lose the bike lanes on Brighton Road

Parking

Parking availability

Parking conditions are disgusting people are going to where they can find a shopping centre rather than street parking and pay high fines

Parking has to improve

Parking improvements

Parking is a problem



Parking permits for staff, keep the Jetty Road open to cars.  
 Parking still a problem  
 Provide more parking in the vicinity of Jetty Road Brighton. Somehow!  
 Remove bicycle lane from Brighton Road.  
 Solve the parking problems in Jetty Road  
 Speed up the road works as it impedes our traffic flow to and from appointments  
 Stop paid parking to entice more people to spend the day at Glenelg  
 Take away bike lanes from Brighton Road and put back to beach paths! Or get rid of restrictions at least!!

### **Marketing (various suggestions)**

Advertising

Allow signage

Better ways of spending funds especially on Jetty Rd Glenelg

Business marketing, get more function and activities to attract people

Employ proactive, forward thinking people, clean up Jetty Road, advertise properly.

Events, which draw crowds to area that utilise many different businesses. Build a world class convention centre in Glenelg, my previous roles with AEG Ogden around south east Audi's and even Darwin has given great organic growth of millions annually that impact all businesses in area as they attract corporate, association and industry delegates to the area.

Extend zone for properties that can be used as office space. Improve signage on Broadway, Glenelg South (preferable some flags as per Jetty Road).

Continue to promote Glenelg as a tourist destination

Generate excitement about the area

Hold round table discussions with a variety of businesses to enable Council to understand some of the issues facing business rather than second guessing

Holdfast area business directory. I am not a shop owner on Jetty Road, but operate an Indoor Plant Hire business to corporate clients from Brighton/Seacliff area to the metro area

Holding more social events to encourage people coming down.

And maybe some promotion outside of Jetty Road

Increased marketing of Jetty Road as a shopping destination

It's far too rigid and perhaps that has something to do with the residents in our area? Not sure. However chill out on the local business trying to grow and expand. They help other businesses grow and expand. Side walk tables and chairs and liquor licenses could be revised...Also, some street decorations- at night Brighton is active - light it up.

Local advertising

Local council newsletter and webpage offering free advertising

Maybe a free networking event??

More activities to bring the whole family to the beach, not just one day or two, it needs whole week or even longer.

More advertising to get people to Glenelg

More advertising. Offering incentives to small business. Assist with refits.

More events on Jetty Road Brighton. Possibly developing a Brighton square like Henley beach

More events to attract more people

More festivals and entertainment in the square

More promotion for Jetty Road traders

More research on customers

Networking opportunities.

Not sure, more local promotions perhaps

Perhaps more advertising or more ways of promoting jetty road as a shopping precinct not just a place for people to come for an ice cream.



Perhaps running business networking opportunities where owners can come and perhaps listen to a speaker on various topics of small business (e.g. leveraging social media or how to actively grow your business) and then have the rest of the time chatting to others but also encouraging everyone to keep moving onto another person to engage in conversation.

Small business meetings - networking events- Small business courses - communicating council's plans for next 12 months

Support more tourism and organise more events to bring more people to the area.

Support organising events for families with young children, where vendors can advertise their products.

Traders annoyed (customers vote) /food and wine festival

Workshops like Adelaide city council provided to east end traders: digital marketing, visual and merchandise skills.

Many more about understand Chinese tourists for Glenelg businesses.

### **Assistance/support**

A lot seems to be done for Jetty Road traders but not much for The Marina precinct

Actions require implementation. Help is offered however not followed up.

Assistance lobbying to state government to maintain funding

Business hub for small local businesses to network, build skills, access office space/meeting rooms/IT

Council to support local business

Encouragement for SMEs

Ensure quality internet connection

Expos for local businesses

I don't have enough information as to how the City of Holdfast Bay supports the business environment and conditions.

I run a "free" Tai Chi/Qigong class, for my students and friends, in the Angus Neill Reserve every Saturday morning.

With financial support, this could be promoted for the health and well-being of other Holdfast Bay residents. This type of support has been offered elsewhere e.g. Magill Council, etc.

If they supported local business to do their repair and maintenance work?

Invest in the street

Offer more grants to train business owners on technology and marketing etc.

Promoting Small Business

More support in encouraging local business to use each other keeping in the Councils area rather using overseas business .Use the people that you want to use you!

Unite landlords for common vision which happens at Harbour town and Marion Westfield

Use local business suppliers

Use local businesses

Yearly meetings, talking about any opportunities for growth and development.

Yes. Measure with results. More action

### **Attract more people to region**

Attract more people to area

Attract more visitors (from anywhere). Become the vibrant shopping, eating precinct, fun

Council should do something to encourage locals to the area

Drive more visitors to the area through improved public facilities and comfort. Also family friendly events

Cheaper rent make the area more vibrant to attract people

Foot traffic is what we need, so everything should be geared to attracting more people. Most arrive in cars, so we need parking, but we also need good public transport links.

Have a promotion to get people back to Glenelg

Increase tourism

Keep crime down to make customers feel safe in the area to shop

Marketing the street to get more people here



Promote it as a destination  
 Something to draw more people to Glenelg  
 To promote Glenelg more to try to bring back people to the street.

### **Council related comments**

Disruption to trade and loss of income when council engages in civil works in proximity to businesses it hurts personal family incomes for people working for themselves and they are without safety income nets suggest council needs to be super mindful when planning this stuff think of your own personal financial impact if you didn't get paid for a month and you were still expected to meet your business and personal financial obligations and responsibilities!

Flexible and proactive planning

Follow through on enquiries would show some interest. I am still waiting to hear back months later. Have given up. Get rid of people with their own agendas. Cut red tape. Some councillors have no idea about running a business. They have never had one.

Get some business people on your staff to advise you

Council has no idea what's going on

Council need to focus on maintaining the environment conducive to promoting economic activity in the area. It should not involve itself in matters such as gay marriage and other subjective and divisive matters

Council staff that deal with business on a daily basis seem to generally lack an understanding of business management and the issues that small businesses face on a daily basis. Council needs to train/recruit staff who understand, or have had, business experience.

Become a role model for lean and effective business strategy

It is not part of the Council's activities to make local businesses more profitable. It should concentrate on making its operation more efficient and provide better services to general ratepayers.

Look at the mix of offerings on Jetty Road Glenelg. What direction is the council heading? Is it food based, retail based or a mix or just full shops. Have they surveyed the public to see what they would like? e.g. shopping experience or entertainment experience.

Maybe come and have a chat

Move with the times

Relax shopping hours - streamline more with eastern states

Remove barriers to business, remove petty bureaucracy, and prioritise business needs and job creation over vocal and negative minorities

Someone that actually has a position in council to communicate with businesses on a regular basis as we do not hear from anyone so hard to give feedback?

Stop allowing more salons from opening every 5 minutes - enough is enough

Talk more to all businesses operated in the area

The planning department need a shake up

We find the council to have minimal focus on real strategies to assist small business

We have only just starting receiving the newsletters as management changed over 12 months ago, we let the council know the change, so communication to send us the newsletters would have been better.

### **Power/Rates/Rent**

Electricity rebates

Cheaper power

Facilitating a sustainable island-able local power network capitalising on community based roof top solar generation and battery storage resources.

Difficult question to answer - I believe that Henley area is about to hit hard with a range of new offerings which will no doubt have an impact on Jetty Road. The number of retailers are down, rents are up etc...Tough times

I have never approached the council for any business support so I have no idea what's on offer

I'd love to find out why I continue to lose power!



**Lower rates (2 responses)**

Lower rates equals lower rent

Much greater transparency in where it spends the business ratepayer money. I feel totally ripped off with council rates

Our rent is too high even when the roadworks etc. affected us in a great deal and had no rent relief for this period

Reduce annual council fee. Already have less revenue, can't afford more

Reduce costs of doing business

Reduce council rates and stop wasting ratepayer's money so people have more money in their weekly budgets - for example cancel the NYE party at Glenelg, it only brings trouble, and drunken destruction, and mess that needs cleaning up. It does nothing for local businesses or rate payers but allows free loaders to come into the area, get free entertainment, and wreck whatever they can - for free, because they think no-one cares.

Reduce red tape in building and development applications. 8 weeks for a carport is ridiculous. Engage more with local business in the light industrial area and listen to real issues without fobbing them off

Rent assistance and advertising

Review the council rate premiums to assist business in being more profitable.

Perhaps reduce the council rates for traders in Jetty Road Glenelg, as a reprieve for what they have gone through over the past 12 months with tram line replacement and now the water replacement.

Try to lower overall rising cost to businesses.

We pay higher council rates than most of suburban. But we don't think we get all the support and help to survive in the tough time for business.

**Other (mixed responses)**

Already discussed with relevant CoHB personnel

Get the NBN rollout sorted ASAP.

Ideas have been submitted previously but are normally never acted upon or responded to.

No it is more of a lack of jobs in Adelaide issue.

Tai Chi & Qigong are scientifically proven health practises. Local residents could benefit from classes and Council provided activities.

We need more people to have jobs, too many redundancies so people are holding onto their money, no confidence in the future.

**Good job**

Council staff doing a good job. We have a good working relationship with Council. Councils using local suppliers where appropriate is good.

The council has been great at holding special events in our strip on Jetty Road Brighton



## 6. TABULATIONS

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

Mean	
Number of whole years	14.67

Statistics		
Number of whole years		
N	Valid	330
	Missing	0
Mean		14.6667
Median		9.5000
Mode		3.00

Number of whole years					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	.00	4	1.2	1.2	1.2
	1.00	20	6.1	6.1	7.3
	2.00	23	7.0	7.0	14.2
	3.00	26	7.9	7.9	22.1
	4.00	22	6.7	6.7	28.8
	5.00	25	7.6	7.6	36.4
	6.00	20	6.1	6.1	42.4
	7.00	15	4.5	4.5	47.0
	8.00	6	1.8	1.8	48.8
	9.00	4	1.2	1.2	50.0
	10.00	24	7.3	7.3	57.3
	11.00	10	3.0	3.0	60.3
	12.00	9	2.7	2.7	63.0
	13.00	7	2.1	2.1	65.2
	14.00	3	.9	.9	66.1
	15.00	13	3.9	3.9	70.0
	16.00	3	.9	.9	70.9
	17.00	5	1.5	1.5	72.4
	18.00	5	1.5	1.5	73.9
	19.00	2	.6	.6	74.5
	20.00	12	3.6	3.6	78.2
	21.00	2	.6	.6	78.8
	22.00	4	1.2	1.2	80.0
	23.00	4	1.2	1.2	81.2
	24.00	2	.6	.6	81.8
	25.00	8	2.4	2.4	84.2
	26.00	1	.3	.3	84.5
	27.00	2	.6	.6	85.2
	30.00	10	3.0	3.0	88.2
	31.00	3	.9	.9	89.1
	32.00	1	.3	.3	89.4
	33.00	1	.3	.3	89.7
	35.00	7	2.1	2.1	91.8
	37.00	2	.6	.6	92.4
	38.00	2	.6	.6	93.0
	39.00	2	.6	.6	93.6
	40.00	3	.9	.9	94.5
	41.00	1	.3	.3	94.8
	42.00	1	.3	.3	95.2
	43.00	1	.3	.3	95.5



## Number of whole years

	Frequency	Percent	Valid Percent	Cumulative Percent
45.00	1	.3	.3	95.8
50.00	1	.3	.3	96.1
56.00	1	.3	.3	96.4
58.00	1	.3	.3	96.7
60.00	3	.9	.9	97.6
65.00	2	.6	.6	98.2
71.00	1	.3	.3	98.5
85.00	1	.3	.3	98.8
90.00	1	.3	.3	99.1
97.00	1	.3	.3	99.4
148.00	1	.3	.3	99.7
150.00	1	.3	.3	100.0
Total	330	100.0	100.0	

Number of years	0-5 years	120
		36.4%
6-10 years	69	20.9%
11-20 years	69	20.9%
Over 20 years	72	21.8%
Total	330	100.0%

		Size of business		
		Small <20 employees	Medium 20-199 employees	Total
Number of years	0-5 years	115	5	120
		39.1%	13.9%	36.4%
6-10 years		57	12	69
		19.4%	33.3%	20.9%
11-20 years		62	7	69
		21.1%	19.4%	20.9%
Over 20 years		60	12	72
		20.4%	33.3%	21.8%
Total		294	36	330
		100.0%	100.0%	100.0%



		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
Number of years	0-5 years	25	5	2	4	0	1	4	11	8	2	12	1	3	37	5	0	120
		34.7%	50.0%	66.7%	30.8%	.0%	100.0%	44.4%	34.4%	61.5%	16.7%	44.4%	33.3%	27.3%	33.0%	71.4%	.0%	36.4%
	6-10 years	19	0	0	3	0	0	3	4	2	4	5	2	1	25	0	1	69
		26.4%	.0%	.0%	23.1%	.0%	.0%	33.3%	12.5%	15.4%	33.3%	18.5%	66.7%	9.1%	22.3%	.0%	33.3%	20.9%
	11-20 years	17	2	1	3	0	0	2	12	2	3	3	0	3	19	0	2	69
	23.6%	20.0%	33.3%	23.1%	.0%	.0%	22.2%	37.5%	15.4%	25.0%	11.1%	.0%	27.3%	17.0%	.0%	66.7%	20.9%	
	Over 20 years	11	3	0	3	2	0	0	5	1	3	7	0	4	31	2	0	72
		15.3%	30.0%	.0%	23.1%	100.0%	.0%	.0%	15.6%	7.7%	25.0%	25.9%	.0%	36.4%	27.7%	28.6%	.0%	21.8%
	Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

**Q2: How many people (including management and owners) did your business employ in the current quarter (September, 2017)? Single response.**

How many people (including management and owners) did your business employ in the current quarter (September, 2017)?	1	67
	2-19	227
	20-49	32
	50-99	2
	100-149	2
	150-199	0
	200+	0
Total		330
		100.0%



Size of business	Small <20 employees	294
		89.1%
	Medium 20-199 employees	36
		10.9%
	Total	330
		100.0%

## What industry sector do you fall into?

	Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
Small <20 employees	48	10	3	13	0	1	9	30	13	10	24	3	11	109	7	3	294
	66.7%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	93.8%	100.0%	83.3%	88.9%	100.0%	100.0%	97.3%	100.0%	100.0%	89.1%
Medium 20-199 employees	24	0	0	0	2	0	0	2	0	2	3	0	0	3	0	0	36
	33.3%	.0%	.0%	.0%	100.0%	.0%	.0%	6.3%	.0%	16.7%	11.1%	.0%	.0%	2.7%	.0%	.0%	10.9%
Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

## Q3: What is your annual turnover range? Single response.

	Size of business			
	Small <20 employees	Medium 20-199 employees	Total	
What is your annual turnover range?	<\$500k	152	0	152
		51.7%	.0%	46.1%
	\$500k-\$1 million	65	8	73
		22.1%	22.2%	22.1%
	\$1 million - \$2 million	22	5	27
		7.5%	13.9%	8.2%
	\$2 million-\$5 million	10	18	28
		3.4%	50.0%	8.5%
	\$5 million-\$10 million	3	1	4
		1.0%	2.8%	1.2%
	\$10 million-\$50 million	2	2	4
		.7%	5.6%	1.2%
	\$50 million+	0	0	0
		.0%	.0%	.0%
	Prefer not to say	40	2	42
		13.6%	5.6%	12.7%
	Total	294	36	330
		100.0%	100.0%	100.0%



		Number of years				Total
		0-5 years	6-10 years	11-20 years	Over 20 years	
What is your annual turnover range?	<\$500k	70	28	31	23	152
		58.3%	40.6%	44.9%	31.9%	46.1%
	\$500k-\$1 million	20	20	17	16	73
		16.7%	29.0%	24.6%	22.2%	22.1%
	\$1 million - \$2 million	8	5	5	9	27
		6.7%	7.2%	7.2%	12.5%	8.2%
	\$2 million-\$5 million	5	8	3	12	28
		4.2%	11.6%	4.3%	16.7%	8.5%
	\$5 million-\$10 million	3	0	1	0	4
		2.5%	.0%	1.4%	.0%	1.2%
	\$10 million-\$50 million	0	1	1	2	4
		.0%	1.4%	1.4%	2.8%	1.2%
	\$50 million+	0	0	0	0	0
		.0%	.0%	.0%	.0%	.0%
	Prefer not to say	14	7	11	10	42
		11.7%	10.1%	15.9%	13.9%	12.7%
	Total	120	69	69	72	330
		100.0%	100.0%	100.0%	100.0%	100.0%



		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
What is your annual turnover range?	<\$500k	27	6	3	3	0	1	5	13	10	4	13	2	5	56	4	0	152
		37.5%	60.0%	100.0%	23.1%	.0%	100.0%	55.6%	40.6%	76.9%	33.3%	48.1%	66.7%	45.5%	50.0%	57.1%	.0%	46.1%
	\$500k-\$1 million	18	2	0	4	1	0	0	7	2	3	5	1	3	26	1	0	73
		25.0%	20.0%	.0%	30.8%	50.0%	.0%	.0%	21.9%	15.4%	25.0%	18.5%	33.3%	27.3%	23.2%	14.3%	.0%	22.1%
	\$1 million - \$2 million	10	1	0	2	1	0	0	1	1	2	0	0	1	7	1	0	27
		13.9%	10.0%	.0%	15.4%	50.0%	.0%	.0%	3.1%	7.7%	16.7%	.0%	.0%	9.1%	6.3%	14.3%	.0%	8.2%
	\$2 million-\$5 million	12	1	0	0	0	0	0	3	0	2	2	0	0	6	0	2	28
		16.7%	10.0%	.0%	.0%	.0%	.0%	.0%	9.4%	.0%	16.7%	7.4%	.0%	.0%	5.4%	.0%	66.7%	8.5%
	\$5 million-\$10 million	0	0	0	1	0	0	1	2	0	0	0	0	0	0	0	0	4
		.0%	.0%	.0%	7.7%	.0%	.0%	11.1%	6.3%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	1.2%
	\$10 million-\$50 million	0	0	0	0	0	0	0	0	0	1	1	0	2	0	0	0	4
		.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	8.3%	3.7%	.0%	18.2%	.0%	.0%	.0%	1.2%
	\$50 million+	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%
	Prefer not to say	5	0	0	3	0	0	3	6	0	0	6	0	0	17	1	1	42
		6.9%	.0%	.0%	23.1%	.0%	.0%	33.3%	18.8%	.0%	.0%	22.2%	.0%	.0%	15.2%	14.3%	33.3%	12.7%
	Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	



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

### Gender

Male - Ratio	<b>5.19</b>
Female - Ratio	<b>6.34</b>

	0	10	20	30	40	50	60	70	80	90	100	Total
Male - Ratio	74	23	30	19	17	71	14	15	14	11	42	330
	22.4%	7.0%	9.1%	5.8%	5.2%	21.5%	4.2%	4.5%	4.2%	3.3%	12.7%	100.0%
Female - Ratio	54	14	14	15	14	72	17	22	27	24	57	330
	16.4%	4.2%	4.2%	4.5%	4.2%	21.8%	5.2%	6.7%	8.2%	7.3%	17.3%	100.0%

### Skill/Unskilled Workforce

Skilled - Ratio	<b>8.43</b>
Unskilled - Ratio	<b>3.15</b>

	0	10	20	30	40	50	60	70	80	90	100	Total
Skilled - Ratio	25	10	8	17	7	32	11	13	14	13	180	330
	7.6%	3.0%	2.4%	5.2%	2.1%	9.7%	3.3%	3.9%	4.2%	3.9%	54.5%	100.0%
Unskilled - Ratio	193	14	14	13	11	32	7	17	8	10	11	330
	58.5%	4.2%	4.2%	3.9%	3.3%	9.7%	2.1%	5.2%	2.4%	3.0%	3.3%	100.0%

### Full time/Part time Employees

Full time employees - Ratio	<b>5.70</b>
Part time employees - Ratio	<b>5.82</b>

	0	10	20	30	40	50	60	70	80	90	100	Total
Full time employees - Ratio	58	33	38	23	9	44	11	12	20	12	70	330
	17.6%	10.0%	11.5%	7.0%	2.7%	13.3%	3.3%	3.6%	6.1%	3.6%	21.2%	100.0%
Part time employees - Ratio	85	13	20	12	11	44	9	22	38	33	43	330
	25.8%	3.9%	6.1%	3.6%	3.3%	13.3%	2.7%	6.7%	11.5%	10.0%	13.0%	100.0%



## Q5: Is your business currently connected to the NBN? Single response.

		Number of years				Size of business			
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
Is your business currently connected to the NBN?	Yes	6	3	1	2	12	10	2	12
		5.0%	4.3%	1.4%	2.8%	3.6%	3.4%	5.6%	3.6%
	No	107	60	66	70	303	270	33	303
		89.2%	87.0%	95.7%	97.2%	91.8%	91.8%	91.7%	91.8%
	Don't know/not sure	7	6	2	0	15	14	1	15
	5.8%	8.7%	2.9%	.0%	4.5%	4.8%	2.8%	4.5%	
Total		120	69	69	72	330	294	36	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		What is your annual turnover range?								Total
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	
Is your business currently connected to the NBN?	Yes	5	5	1	1	0	0	0	0	12
		3.3%	6.8%	3.7%	3.6%	.0%	.0%	.0%	.0%	3.6%
	No	141	67	25	25	4	3	0	38	303
		92.8%	91.8%	92.6%	89.3%	100.0%	75.0%	.0%	90.5%	91.8%
	Don't know/not sure	6	1	1	2	0	1	0	4	15
	3.9%	1.4%	3.7%	7.1%	.0%	25.0%	.0%	9.5%	4.5%	
Total		152	73	27	28	4	4	0	42	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%

## What industry sector do you fall into?

		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
		Is your business currently connected to the NBN?	Yes	2	0	0	0	0	0	1	1	1	1	2	1	1	2	0
		2.8%	.0%	.0%	.0%	.0%	.0%	11.1%	3.1%	7.7%	8.3%	7.4%	33.3%	9.1%	1.8%	.0%	.0%	3.6%
	No	69	9	3	13	2	1	7	28	12	10	24	2	10	104	7	2	303
		95.8%	90.0%	100.0%	100.0%	100.0%	100.0%	77.8%	87.5%	92.3%	83.3%	88.9%	66.7%	90.9%	92.9%	100.0%	66.7%	91.8%
	Don't know/not sure	1	1	0	0	0	0	1	3	0	1	1	0	0	6	0	1	15
		1.4%	10.0%	.0%	.0%	.0%	.0%	11.1%	9.4%	.0%	8.3%	3.7%	.0%	.0%	5.4%	.0%	33.3%	4.5%
Total		72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



**Q6: On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with the NBN connection?**

Migration process to NBN	<b>6.08</b>
Internet connection	<b>5.50</b>

**Q7: Why did you rate your NBN migration/connection that way? Open ended.**

Migration process to NBN Rating	Internet Connection Rating	Comment
9	10	It is our future!
8	7	Very happy with it
6	7	Whilst the service can be fast, it is often slow and drops out.
6	6	Not given
6	6	Have some issues
6	6	It's average
6	6	I haven't noticed any difference
8	5	No good
6	5	Because it stuffed up my shop alarm as it wasn't compatible & cost me \$500 out of pocket
7	5	Keeps dropping out.... goes slow sometimes
3	2	Migration process was difficult and needed several tech support calls. And internet speeds are poor, less than ADSL2
2	1	It is hopeless

**Q8: Does your business transact online?**

		Number of years				Total	Size of business		
		0-5 years	6-10 years	11-20 years	Over 20 years		Small <20 employees	Medium 20-199 employees	Total
Does your business transact online?	Yes	28 38.9%	14 29.8%	15 35.7%	14 31.8%	71 34.6%	64 34.2%	7 38.9%	71 34.6%
	No	40 55.6%	30 63.8%	24 57.1%	30 68.2%	124 60.5%	113 60.4%	11 61.1%	124 60.5%
	Don't know/not sure	4 5.6%	3 6.4%	3 7.1%	0 .0%	10 4.9%	10 5.3%	0 .0%	10 4.9%
	Total	72 100.0%	47 100.0%	42 100.0%	44 100.0%	205 100.0%	187 100.0%	18 100.0%	205 100.0%



		What is your annual turnover range?								Total
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	Total
Does your business transact online?	Yes	18	23	12	6	0	0	0	12	71
		20.5%	48.9%	50.0%	50.0%	.0%	.0%	.0%	38.7%	34.6%
	No	67	21	12	6	0	2	0	16	124
		76.1%	44.7%	50.0%	50.0%	.0%	100.0%	.0%	51.6%	60.5%
	Don't know/hot sure	3	3	0	0	1	0	0	3	10
		3.4%	6.4%	.0%	.0%	100.0%	.0%	.0%	9.7%	4.9%
	Total	88	47	24	12	1	2	0	31	205
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%

		What industry sector do you fall into?															Total	
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
Does your business transact online?	Yes	12	2	1	2	0	0	2	5	1	3	6	1	4	28	2	2	71
		22.6%	66.7%	50.0%	40.0%	.0%	.0%	40.0%	31.3%	33.3%	50.0%	60.0%	100.0%	50.0%	32.6%	50.0%	100.0%	34.6%
	No	36	1	1	3	1	0	1	9	2	3	4	0	4	57	2	0	124
		67.9%	33.3%	50.0%	60.0%	100.0%	.0%	20.0%	56.3%	66.7%	50.0%	40.0%	.0%	50.0%	66.3%	50.0%	.0%	60.5%
	Don't know/not sure	5	0	0	0	0	0	2	2	0	0	0	0	0	1	0	0	10
		9.4%	.0%	.0%	.0%	.0%	.0%	40.0%	12.5%	.0%	.0%	.0%	.0%	.0%	1.2%	.0%	.0%	4.9%
	Total	53	3	2	5	1	0	5	16	3	6	10	1	8	86	4	2	205
		100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



**Q9: Do you invest in eCommerce or digital platforms to aid business transactions? i.e. buying and selling of goods and services, or transmitting funds or data, primarily using the internet. Single response.**

		Number of years				Size of business			
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
Do you invest in eCommerce or digital platforms to aid business transactions? i.e. buying and selling of goods and services, or transmitting funds or data, primarily using the internet.	Yes	50	22	30	42	144	127	17	144
		41.7%	31.9%	43.5%	58.3%	43.6%	43.2%	47.2%	43.6%
	No	64	41	35	30	170	151	19	170
		53.3%	59.4%	50.7%	41.7%	51.5%	51.4%	52.8%	51.5%
	Don't know/not sure	6	6	4	0	16	16	0	16
		5.0%	8.7%	5.8%	.0%	4.8%	5.4%	.0%	4.8%
	Total	120	69	69	72	330	294	36	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		What is your annual turnover range?								
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	Total
Do you invest in eCommerce or digital platforms to aid business transactions? i.e. buying and selling of goods and services, or transmitting funds or data, primarily using the internet.	Yes	56	39	14	16	4	3	0	12	144
		36.8%	53.4%	51.9%	57.1%	100.0%	75.0%	.0%	28.6%	43.6%
	No	90	31	11	12	0	1	0	25	170
		59.2%	42.5%	40.7%	42.9%	.0%	25.0%	.0%	59.5%	51.5%
	Don't know/not sure	6	3	2	0	0	0	0	5	16
		3.9%	4.1%	7.4%	.0%	.0%	.0%	.0%	11.9%	4.8%
	Total	152	73	27	28	4	4	0	42	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%

		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
Do you invest in eCommerce or digital platforms to	Yes	22	5	3	7	1	1	4	15	7	6	15	1	6	42	6	3	144
		30.6%	50.0%	100.0%	53.8%	50.0%	100.0%	44.4%	46.9%	53.8%	50.0%	55.6%	33.3%	54.5%	37.5%	85.7%	100.0%	43.6%
	No	46	4	0	5	1	0	3	15	6	6	12	2	5	64	1	0	170
		63.9%	40.0%	.0%	38.5%	50.0%	.0%	33.3%	46.9%	46.2%	50.0%	44.4%	66.7%	45.5%	57.1%	14.3%	.0%	51.5%
	Don't know/not sure	4	1	0	1	0	0	2	2	0	0	0	0	0	6	0	0	16
		5.6%	10.0%	.0%	7.7%	.0%	.0%	22.2%	6.3%	.0%	.0%	.0%	.0%	.0%	5.4%	.0%	.0%	4.8%
	Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



**Q10: On a scale of 0 to 10, where 0 is totally unimportant and 10 is totally important, how important are intrastate, interstate and international visitors to your business? Rate all 3 options.**

Intrastate	<b>7.47</b>
Interstate	<b>5.19</b>
International	<b>3.66</b>

	Number of years				Total	Size of business		
	0-5 years	6-10 years	11-20 years	Over 20 years		Small <20 employees	Medium 20-199 employees	Total
Intrastate	<b>7.14</b>	<b>8.24</b>	<b>6.95</b>	<b>7.82</b>	<b>7.47</b>	<b>7.41</b>	<b>7.91</b>	<b>7.47</b>
Interstate	<b>4.91</b>	<b>6.01</b>	<b>5.10</b>	<b>4.90</b>	<b>5.19</b>	<b>5.04</b>	<b>6.39</b>	<b>5.19</b>
International	<b>3.24</b>	<b>4.42</b>	<b>3.88</b>	<b>3.36</b>	<b>3.66</b>	<b>3.39</b>	<b>5.74</b>	<b>3.66</b>

	What is your annual turnover range?							Prefer not to say	Total
	<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+		
Intrastate	<b>7.31</b>	<b>7.64</b>	<b>8.00</b>	<b>7.88</b>	<b>4.00</b>	<b>7.25</b>	.	<b>7.46</b>	<b>7.47</b>
Interstate	<b>4.72</b>	<b>4.96</b>	<b>6.22</b>	<b>6.29</b>	<b>3.50</b>	<b>4.75</b>	.	<b>6.00</b>	<b>5.19</b>
International	<b>3.21</b>	<b>3.43</b>	<b>4.85</b>	<b>5.63</b>	<b>2.00</b>	<b>3.75</b>	.	<b>3.68</b>	<b>3.66</b>

	What industry sector do you fall into?																Total
	Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	
Intrastate	<b>8.62</b>	<b>7.13</b>	<b>8.00</b>	<b>4.55</b>	<b>10.00</b>	<b>10.00</b>	<b>5.75</b>	<b>6.58</b>	<b>5.92</b>	<b>6.30</b>	<b>6.92</b>	<b>6.67</b>	<b>7.18</b>	<b>7.79</b>	<b>7.00</b>	<b>10.00</b>	<b>7.47</b>
Interstate	<b>6.43</b>	<b>4.00</b>	<b>4.33</b>	<b>1.38</b>	<b>2.50</b>	<b>5.00</b>	<b>3.38</b>	<b>2.55</b>	<b>5.85</b>	<b>3.92</b>	<b>5.15</b>	<b>3.33</b>	<b>4.45</b>	<b>6.01</b>	<b>4.83</b>	<b>8.33</b>	<b>5.19</b>
International	<b>5.59</b>	<b>3.17</b>	<b>1.33</b>	<b>.31</b>	<b>2.50</b>	<b>.00</b>	<b>2.29</b>	<b>1.61</b>	<b>2.62</b>	<b>2.67</b>	<b>2.92</b>	<b>.67</b>	<b>3.73</b>	<b>4.19</b>	<b>2.33</b>	<b>5.33</b>	<b>3.66</b>

**Q11: How do you expect the following economies to perform over the next 12 months? Rate all 3 options.**

	Weaker	Slightly weaker	Same	Slightly stronger	Stronger	Total
National economy	<b>24</b>	<b>62</b>	<b>171</b>	<b>67</b>	<b>6</b>	<b>330</b>
	<b>7.3%</b>	<b>18.8%</b>	<b>51.8%</b>	<b>20.3%</b>	<b>1.8%</b>	<b>100.0%</b>
South Australian economy	<b>55</b>	<b>86</b>	<b>133</b>	<b>53</b>	<b>3</b>	<b>330</b>
	<b>16.7%</b>	<b>26.1%</b>	<b>40.3%</b>	<b>16.1%</b>	<b>.9%</b>	<b>100.0%</b>
Local council area economy	<b>33</b>	<b>71</b>	<b>162</b>	<b>60</b>	<b>4</b>	<b>330</b>
	<b>10.0%</b>	<b>21.5%</b>	<b>49.1%</b>	<b>18.2%</b>	<b>1.2%</b>	<b>100.0%</b>



## National economy

		How many people (including management and owners) did your business employ in the current quarter (September, 2017)?												
		Number of years												
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	1	2-19	20-49	50-99	100-149	150-199	200+	Total
National economy	Weaker	5	4	10	5	24	6	17	0	0	1	0	0	24
		4.2%	5.8%	14.5%	6.9%	7.3%	9.0%	7.5%	.0%	.0%	50.0%	.0%	.0%	7.3%
	Slightly weaker	21	14	12	15	62	18	37	6	1	0	0	0	62
		17.5%	20.3%	17.4%	20.8%	18.8%	26.9%	16.3%	18.8%	50.0%	.0%	.0%	.0%	18.8%
	Same	66	33	32	40	171	29	121	21	0	0	0	0	171
		55.0%	47.8%	46.4%	55.6%	51.8%	43.3%	53.3%	65.6%	.0%	.0%	.0%	.0%	51.8%
Slightly stronger	24	17	14	12	67	14	46	5	1	1	0	0	67	
	20.0%	24.6%	20.3%	16.7%	20.3%	20.9%	20.3%	15.6%	50.0%	50.0%	.0%	.0%	20.3%	
Stronger	4	1	1	0	6	0	6	0	0	0	0	0	6	
	3.3%	1.4%	1.4%	.0%	1.8%	.0%	2.6%	.0%	.0%	.0%	.0%	.0%	1.8%	
Total		120	69	69	72	330	67	227	32	2	2	0	0	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	.0%	100.0%

		What is your annual turnover range?								Total
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	Total
National economy	Weaker	14	4	2	1	0	0	0	3	24
		9.2%	5.5%	7.4%	3.6%	.0%	.0%	.0%	7.1%	7.3%
	Slightly weaker	33	10	3	6	1	1	0	8	62
		21.7%	13.7%	11.1%	21.4%	25.0%	25.0%	.0%	19.0%	18.8%
	Same	71	42	15	15	2	2	0	24	171
		46.7%	57.5%	55.6%	53.6%	50.0%	50.0%	.0%	57.1%	51.8%
Slightly stronger	31	16	7	6	0	1	0	6	67	
	20.4%	21.9%	25.9%	21.4%	.0%	25.0%	.0%	14.3%	20.3%	
Stronger	3	1	0	0	1	0	0	1	6	
	2.0%	1.4%	.0%	.0%	25.0%	.0%	.0%	2.4%	1.8%	
Total		152	73	27	28	4	4	0	42	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%



		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
National economy	Weaker	4	0	0	1	0	0	2	4	1	0	2	0	0	9	1	0	24
		5.6%	.0%	.0%	7.7%	.0%	.0%	22.2%	12.5%	7.7%	.0%	7.4%	.0%	.0%	8.0%	14.3%	.0%	7.3%
	Slightly weaker	11	1	1	2	0	0	2	4	2	1	6	1	2	26	2	1	62
		15.3%	10.0%	33.3%	15.4%	.0%	.0%	22.2%	12.5%	15.4%	8.3%	22.2%	33.3%	18.2%	23.2%	28.6%	33.3%	18.8%
	Same	41	5	1	5	2	0	2	18	6	7	13	1	6	60	4	0	171
		56.9%	50.0%	33.3%	38.5%	100.0%	.0%	22.2%	56.3%	46.2%	58.3%	48.1%	33.3%	54.5%	53.6%	57.1%	.0%	51.8%
Slightly stronger	15	4	1	4	0	1	3	6	2	4	6	1	3	15	0	2	67	
	20.8%	40.0%	33.3%	30.8%	.0%	100.0%	33.3%	18.8%	15.4%	33.3%	22.2%	33.3%	27.3%	13.4%	.0%	66.7%	20.3%	
Stronger	1	0	0	1	0	0	0	0	2	0	0	0	0	2	0	0	6	
	1.4%	.0%	.0%	7.7%	.0%	.0%	.0%	.0%	15.4%	.0%	.0%	.0%	.0%	1.8%	.0%	.0%	1.8%	
Total		72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

### South Australian economy

		Number of years					Size of business		
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
South Australian economy	Weaker	16	12	14	13	55	50	5	55
		13.3%	17.4%	20.3%	18.1%	16.7%	17.0%	13.9%	16.7%
	Slightly weaker	23	13	23	27	86	71	15	86
		19.2%	18.8%	33.3%	37.5%	26.1%	24.1%	41.7%	26.1%
	Same	51	32	24	26	133	121	12	133
		42.5%	46.4%	34.8%	36.1%	40.3%	41.2%	33.3%	40.3%
Slightly stronger	28	11	8	6	53	49	4	53	
	23.3%	15.9%	11.6%	8.3%	16.1%	16.7%	11.1%	16.1%	
Stronger	2	1	0	0	3	3	0	3	
	1.7%	1.4%	.0%	.0%	.9%	1.0%	.0%	.9%	
Total		120	69	69	72	330	294	36	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



		What is your annual turnover range?									
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	Total	
South Australian economy	Weaker	32	8	3	5	0	1	0	6	55	
		21.1%	11.0%	11.1%	17.9%	.0%	25.0%	.0%	14.3%	16.7%	
	Slightly weaker	32	24	6	13	1	0	0	10	86	
		21.1%	32.9%	22.2%	46.4%	25.0%	.0%	.0%	23.8%	26.1%	
	Same	67	26	12	6	0	2	0	20	133	
		44.1%	35.6%	44.4%	21.4%	.0%	50.0%	.0%	47.6%	40.3%	
	Slightly stronger	19	14	6	4	3	1	0	6	53	
	12.5%	19.2%	22.2%	14.3%	75.0%	25.0%	.0%	14.3%	16.1%		
Stronger	2	1	0	0	0	0	0	0	3		
	1.3%	1.4%	.0%	.0%	.0%	.0%	.0%	.0%	.9%		
Total		152	73	27	28	4	4	0	42	330	
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	

		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
South Australian economy	Weaker	8	1	0	3	0	0	4	5	3	1	7	0	2	17	3	1	55
		11.1%	10.0%	.0%	23.1%	.0%	.0%	44.4%	15.6%	23.1%	8.3%	25.9%	.0%	18.2%	15.2%	42.9%	33.3%	16.7%
	Slightly weaker	17	4	1	2	1	0	1	9	3	3	6	2	2	32	3	0	86
		23.6%	40.0%	33.3%	15.4%	50.0%	.0%	11.1%	28.1%	23.1%	25.0%	22.2%	66.7%	18.2%	28.6%	42.9%	.0%	26.1%
	Same	36	3	1	4	0	1	2	13	5	6	7	1	5	48	1	0	133
		50.0%	30.0%	33.3%	30.8%	.0%	100.0%	22.2%	40.6%	38.5%	50.0%	25.9%	33.3%	45.5%	42.9%	14.3%	.0%	40.3%
	Slightly stronger	10	2	1	4	1	0	2	5	2	2	6	0	2	14	0	2	53
	13.9%	20.0%	33.3%	30.8%	50.0%	.0%	22.2%	15.6%	15.4%	16.7%	22.2%	.0%	18.2%	12.5%	.0%	66.7%	16.1%	
Stronger	1	0	0	0	0	0	0	0	0	0	1	0	0	1	0	0	3	
	1.4%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	3.7%	.0%	.0%	.9%	.0%	.0%	.9%	
Total		72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



## Local council area economy

		Number of years					Size of business			
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total	
Local council area economy	Weaker	6	7	9	11	33	30	3	33	
		5.0%	10.1%	13.0%	15.3%	10.0%	10.2%	8.3%	10.0%	
	Slightly weaker	17	20	18	16	71	57	14	71	
		14.2%	29.0%	26.1%	22.2%	21.5%	19.4%	38.9%	21.5%	
	Same	69	24	32	37	162	151	11	162	
		57.5%	34.8%	46.4%	51.4%	49.1%	51.4%	30.6%	49.1%	
	Slightly stronger	25	17	10	8	60	52	8	60	
	20.8%	24.6%	14.5%	11.1%	18.2%	17.7%	22.2%	18.2%		
Stronger	3	1	0	0	4	4	0	4		
	2.5%	1.4%	.0%	.0%	1.2%	1.4%	.0%	1.2%		
Total	120	69	69	72	330	294	36	330		
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		

		What is your annual turnover range?								
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	Total
Local council area economy	Weaker	20	3	3	2	0	1	0	4	33
		13.2%	4.1%	11.1%	7.1%	.0%	25.0%	.0%	9.5%	10.0%
	Slightly weaker	31	16	4	9	1	0	0	10	71
		20.4%	21.9%	14.8%	32.1%	25.0%	.0%	.0%	23.8%	21.5%
	Same	74	35	15	12	2	2	0	22	162
		48.7%	47.9%	55.6%	42.9%	50.0%	50.0%	.0%	52.4%	49.1%
	Slightly stronger	23	19	5	5	1	1	0	6	60
	15.1%	26.0%	18.5%	17.9%	25.0%	25.0%	.0%	14.3%	18.2%	
Stronger	4	0	0	0	0	0	0	0	4	
	2.6%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	1.2%	
Total	152	73	27	28	4	4	0	42	330	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	



		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
Local council area economy	Weaker	6	0	0	3	0	0	1	3	3	0	4	0	2	8	2	1	33
		8.3%	.0%	.0%	23.1%	.0%	.0%	11.1%	9.4%	23.1%	.0%	14.8%	.0%	18.2%	7.1%	28.6%	33.3%	10.0%
	Slightly weaker	17	4	0	1	1	0	2	6	1	3	5	0	1	29	1	0	71
		23.6%	40.0%	.0%	7.7%	50.0%	.0%	22.2%	18.8%	7.7%	25.0%	18.5%	.0%	9.1%	25.9%	14.3%	.0%	21.5%
	Same	34	4	1	6	1	1	3	18	7	6	12	3	5	57	4	0	162
		47.2%	40.0%	33.3%	46.2%	50.0%	100.0%	33.3%	56.3%	53.8%	50.0%	44.4%	100.0%	45.5%	50.9%	57.1%	.0%	49.1%
Slightly stronger	13	1	2	3	0	0	3	5	2	3	5	0	3	18	0	2	60	
	18.1%	10.0%	66.7%	23.1%	.0%	.0%	33.3%	15.6%	15.4%	25.0%	18.5%	.0%	27.3%	16.1%	.0%	66.7%	18.2%	
Stronger	2	1	0	0	0	0	0	0	0	0	1	0	0	0	0	0	4	
	2.8%	10.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	3.7%	.0%	.0%	.0%	.0%	.0%	1.2%	
Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	



**Q12: How would you describe the following business KPIs in the Q3 September quarter of 2017? Were they up, down or about the same as the previous quarter? Rate all KPIs.**

	Down	Same	Up	Total
General business conditions	104 32.4%	156 48.6%	61 19.0%	321 100.0%
Total sales/revenue	110 34.2%	130 40.4%	82 25.5%	322 100.0%
Average wages	38 12.1%	182 58.1%	93 29.7%	313 100.0%
Export sales	27 17.3%	117 75.0%	12 7.7%	156 100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	21 6.8%	179 57.7%	110 35.5%	310 100.0%
Selling prices	44 13.9%	216 68.4%	56 17.7%	316 100.0%
Profitability	125 38.9%	155 48.3%	41 12.8%	321 100.0%
Number of employees	61 19.2%	223 70.1%	34 10.7%	318 100.0%
Overtime worked	63 22.7%	135 48.7%	79 28.5%	277 100.0%
Investment in buildings and structures	92 35.5%	134 51.7%	33 12.7%	259 100.0%
Investment in plant and equipment	86 31.0%	139 50.2%	52 18.8%	277 100.0%
Investment in eCommerce	85 33.9%	120 47.8%	46 18.3%	251 100.0%

**Q13: How do you expect the same business KPIs to perform in Q4 of 2017? Were they up, down or about the same as the previous quarter? Rate all KPIs.**

	Down	Same	Up	Total
General business conditions	56 17.4%	175 54.5%	90 28.0%	321 100.0%
Total sales/revenue	67 20.8%	139 43.2%	116 36.0%	322 100.0%
Average wages	27 8.5%	191 60.4%	98 31.0%	316 100.0%
Export sales	17 9.7%	125 71.4%	33 18.9%	175 100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	21 6.8%	184 59.9%	102 33.2%	307 100.0%
Selling prices	29 9.3%	224 71.6%	60 19.2%	313 100.0%
Profitability	81 25.5%	155 48.7%	82 25.8%	318 100.0%
Number of employees	47 14.9%	213 67.4%	56 17.7%	316 100.0%
Overtime worked	50 17.5%	159 55.6%	77 26.9%	286 100.0%
Investment in buildings and structures	72 27.1%	149 56.0%	45 16.9%	266 100.0%
Investment in plant and equipment	74 27.0%	143 52.2%	57 20.8%	274 100.0%
Investment in eCommerce	53 20.8%	145 56.9%	57 22.4%	255 100.0%



**Q14: Thinking about the next 12 months, how confident do you feel about your business prospects? Single response.**

		Number of years					Size of business		
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
		Thinking about the next 12 months, how confident do you feel about your business prospects?	Extremely confident	13 10.8%	1 1.4%	7 10.1%	7 9.7%	28 8.5%	23 7.8%
	Fairly confident	58 48.3%	34 49.3%	24 34.8%	30 41.7%	146 44.2%	133 45.2%	13 36.1%	146 44.2%
	Neutral	32 26.7%	10 14.5%	21 30.4%	14 19.4%	77 23.3%	74 25.2%	3 8.3%	77 23.3%
	Fairly worried	14 11.7%	19 27.5%	13 18.8%	18 25.0%	64 19.4%	51 17.3%	13 36.1%	64 19.4%
	Extremely worried	3 2.5%	5 7.2%	4 5.8%	3 4.2%	15 4.5%	13 4.4%	2 5.6%	15 4.5%
	Total	120 100.0%	69 100.0%	69 100.0%	72 100.0%	330 100.0%	294 100.0%	36 100.0%	330 100.0%

		What is your annual turnover range?							Total	
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+		
		Thinking about the next 12 months, how confident do you feel about your business prospects?	Extremely confident	9 5.9%	10 13.7%	1 3.7%	3 10.7%	2 50.0%		0 .0%
	Fairly confident	60 39.5%	32 43.8%	19 70.4%	10 35.7%	2 50.0%	3 75.0%	0 .0%	20 47.6%	146 44.2%
	Neutral	46 30.3%	10 13.7%	3 11.1%	2 7.1%	0 .0%	1 25.0%	0 .0%	15 35.7%	77 23.3%
	Fairly worried	28 18.4%	19 26.0%	4 14.8%	11 39.3%	0 .0%	0 .0%	0 .0%	2 4.8%	64 19.4%
	Extremely worried	9 5.9%	2 2.7%	0 .0%	2 7.1%	0 .0%	0 .0%	0 .0%	2 4.8%	15 4.5%
	Total	152 100.0%	73 100.0%	27 100.0%	28 100.0%	4 100.0%	4 100.0%	0 .0%	42 100.0%	330 100.0%



What industry sector do you fall into?

		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
Thinking	Extremely	4	0	0	0	1	0	1	4	1	1	3	0	1	11	0	1	28
about the	confident	5.6%	.0%	.0%	.0%	50.0%	.0%	11.1%	12.5%	7.7%	8.3%	11.1%	.0%	9.1%	9.8%	.0%	33.3%	8.5%
next 12	Fairly	28	8	1	7	1	1	3	15	8	9	13	2	5	44	0	1	146
months, how	confident	38.9%	80.0%	33.3%	53.8%	50.0%	100.0%	33.3%	46.9%	61.5%	75.0%	48.1%	66.7%	45.5%	39.3%	.0%	33.3%	44.2%
confident do	Neutral	15	1	2	4	0	0	5	5	2	1	10	1	3	25	3	0	77
you feel		20.8%	10.0%	66.7%	30.8%	.0%	.0%	55.6%	15.6%	15.4%	8.3%	37.0%	33.3%	27.3%	22.3%	42.9%	.0%	23.3%
about your	Fairly	21	1	0	2	0	0	0	6	2	1	1	0	2	25	2	1	64
business	worried	29.2%	10.0%	.0%	15.4%	.0%	.0%	.0%	18.8%	15.4%	8.3%	3.7%	.0%	18.2%	22.3%	28.6%	33.3%	19.4%
prospects?	Extremely	4	0	0	0	0	0	0	2	0	0	0	0	0	7	2	0	15
	worried	5.6%	.0%	.0%	.0%	.0%	.0%	.0%	6.3%	.0%	.0%	.0%	.0%	.0%	6.3%	28.6%	.0%	4.5%
	Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



**Q15: As far as business is concerned, what problems, if any, are you facing at the moment? Multiple response.**

\$ProblemsFacing		Number of years					Size of business		
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
	Costs or overheads	59	37	41	51	188	158	30	188
		49.2%	53.6%	59.4%	70.8%	57.0%	53.7%	83.3%	57.0%
	Economic climate	35	36	33	44	148	129	19	148
		29.2%	52.2%	47.8%	61.1%	44.8%	43.9%	52.8%	44.8%
	Lack of work or sales	58	37	25	25	145	130	15	145
		48.3%	53.6%	36.2%	34.7%	43.9%	44.2%	41.7%	43.9%
	Cash flow, bad debts or profitability	39	36	31	26	132	118	14	132
		32.5%	52.2%	44.9%	36.1%	40.0%	40.1%	38.9%	40.0%
	Competition	35	30	27	24	116	98	18	116
		29.2%	43.5%	39.1%	33.3%	35.2%	33.3%	50.0%	35.2%
	Taxes	30	19	26	32	107	95	12	107
		25.0%	27.5%	37.7%	44.4%	32.4%	32.3%	33.3%	32.4%
	Paperwork or bureaucracy	19	18	26	35	98	82	16	98
		15.8%	26.1%	37.7%	48.6%	29.7%	27.9%	44.4%	29.7%
	Finding or keeping staff	22	18	12	16	68	55	13	68
		18.3%	26.1%	17.4%	22.2%	20.6%	18.7%	36.1%	20.6%
	There are no problems at the moment	12	4	9	6	31	31	0	31
		10.0%	5.8%	13.0%	8.3%	9.4%	10.5%	.0%	9.4%
	Other	15	5	6	3	29	24	5	29
		12.5%	7.2%	8.7%	4.2%	8.8%	8.2%	13.9%	8.8%
	Total	120	69	69	72	330	294	36	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

\$ProblemsFacing		What is your annual turnover range?								
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	Total
	Costs or overheads	75	49	16	21	2	3	0	22	188
		49.3%	67.1%	59.3%	75.0%	50.0%	75.0%	.0%	52.4%	57.0%
	Economic climate	70	34	10	17	2	1	0	14	148
		46.1%	46.6%	37.0%	60.7%	50.0%	25.0%	.0%	33.3%	44.8%
	Lack of work or sales	81	28	9	11	2	2	0	12	145
		53.3%	38.4%	33.3%	39.3%	50.0%	50.0%	.0%	28.6%	43.9%
	Cash flow, bad debts or profitability	76	30	5	12	0	0	0	9	132
		50.0%	41.1%	18.5%	42.9%	.0%	.0%	.0%	21.4%	40.0%
	Competition	49	29	8	13	3	1	0	13	116
		32.2%	39.7%	29.6%	46.4%	75.0%	25.0%	.0%	31.0%	35.2%
	Taxes	49	27	12	10	1	1	0	7	107
		32.2%	37.0%	44.4%	35.7%	25.0%	25.0%	.0%	16.7%	32.4%
	Paperwork or bureaucracy	45	21	10	10	1	2	0	9	98
		29.6%	28.8%	37.0%	35.7%	25.0%	50.0%	.0%	21.4%	29.7%
	Finding or keeping staff	22	17	12	7	1	0	0	9	68
		14.5%	23.3%	44.4%	25.0%	25.0%	.0%	.0%	21.4%	20.6%
	There are no problems at the moment	16	5	3	1	0	1	0	5	31
		10.5%	6.8%	11.1%	3.6%	.0%	25.0%	.0%	11.9%	9.4%
	Other	11	8	3	3	0	1	0	3	29
		7.2%	11.0%	11.1%	10.7%	.0%	25.0%	.0%	7.1%	8.8%
	Total	152	73	27	28	4	4	0	42	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%



		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
\$ProblemsFacing	Costs or overheads	54	3	2	8	1	0	2	17	3	9	10	1	5	68	4	1	188
		75.0%	30.0%	66.7%	61.5%	50.0%	.0%	22.2%	53.1%	23.1%	75.0%	37.0%	33.3%	45.5%	60.7%	57.1%	33.3%	57.0%
	Economic climate	36	1	0	5	1	1	3	13	4	3	12	1	2	60	5	1	148
		50.0%	10.0%	.0%	38.5%	50.0%	100.0%	33.3%	40.6%	30.8%	25.0%	44.4%	33.3%	18.2%	53.6%	71.4%	33.3%	44.8%
	Lack of work or sales	40	1	2	5	0	1	1	12	5	2	7	0	4	59	5	1	145
		55.6%	10.0%	66.7%	38.5%	.0%	100.0%	11.1%	37.5%	38.5%	16.7%	25.9%	.0%	36.4%	52.7%	71.4%	33.3%	43.9%
	Cash flow, bad debts or profitability	39	0	1	6	0	0	3	10	1	7	7	0	3	50	4	1	132
		54.2%	.0%	33.3%	46.2%	.0%	.0%	33.3%	31.3%	7.7%	58.3%	25.9%	.0%	27.3%	44.6%	57.1%	33.3%	40.0%
	Competition	38	1	1	4	1	0	1	17	0	1	3	0	5	42	1	1	116
		52.8%	10.0%	33.3%	30.8%	50.0%	.0%	11.1%	53.1%	.0%	8.3%	11.1%	.0%	45.5%	37.5%	14.3%	33.3%	35.2%
	Taxes	26	3	0	5	0	0	3	11	2	5	11	1	4	33	2	1	107
		36.1%	30.0%	.0%	38.5%	.0%	.0%	33.3%	34.4%	15.4%	41.7%	40.7%	33.3%	36.4%	29.5%	28.6%	33.3%	32.4%
	Paperwork or bureaucracy	23	3	0	4	2	0	3	17	1	7	6	0	5	25	2	0	98
		31.9%	30.0%	.0%	30.8%	100.0%	.0%	33.3%	53.1%	7.7%	58.3%	22.2%	.0%	45.5%	22.3%	28.6%	.0%	29.7%
	Finding or keeping staff	28	2	1	4	0	0	1	2	1	1	5	1	2	17	3	0	68
		38.9%	20.0%	33.3%	30.8%	.0%	.0%	11.1%	6.3%	7.7%	8.3%	18.5%	33.3%	18.2%	15.2%	42.9%	.0%	20.6%
	There are no problems at the moment	4	5	0	1	0	0	2	1	2	0	3	1	2	8	0	2	31
	5.6%	50.0%	.0%	7.7%	.0%	.0%	22.2%	3.1%	15.4%	.0%	11.1%	33.3%	18.2%	7.1%	.0%	66.7%	9.4%	
Other	8	0	0	1	0	0	0	2	4	4	2	0	1	5	2	0	29	
	11.1%	.0%	.0%	7.7%	.0%	.0%	.0%	6.3%	30.8%	33.3%	7.4%	.0%	9.1%	4.5%	28.6%	.0%	8.8%	
Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	



## Q16: What are the barriers to taking on new employees? Multiple response.

		Number of years				Total	Size of business		
		0-5 years	6-10 years	11-20 years	Over 20 years		Small <20 employees	Medium 20-199 employees	Total
\$BarriersNewEmployees	Cost of employing	51	40	33	40	164	140	24	164
		42.5%	58.0%	47.8%	55.6%	49.7%	47.6%	66.7%	49.7%
	Lack of work/sales	47	41	28	26	142	125	17	142
		39.2%	59.4%	40.6%	36.1%	43.0%	42.5%	47.2%	43.0%
	Finding suitable/quality staff	40	26	21	31	118	102	16	118
		33.3%	37.7%	30.4%	43.1%	35.8%	34.7%	44.4%	35.8%
	Profitability/lack of profits	37	34	19	22	112	102	10	112
		30.8%	49.3%	27.5%	30.6%	33.9%	34.7%	27.8%	33.9%
	Don't need any more staff	41	13	31	26	111	104	7	111
		34.2%	18.8%	44.9%	36.1%	33.6%	35.4%	19.4%	33.6%
	Lack of funds	23	26	15	13	77	73	4	77
		19.2%	37.7%	21.7%	18.1%	23.3%	24.8%	11.1%	23.3%
	Finding those who want to work	14	19	10	19	62	49	13	62
		11.7%	27.5%	14.5%	26.4%	18.8%	16.7%	36.1%	18.8%
	Lack of cash flow	21	18	14	9	62	56	6	62
		17.5%	26.1%	20.3%	12.5%	18.8%	19.0%	16.7%	18.8%
	Other	7	4	3	2	16	12	4	16
		5.8%	5.8%	4.3%	2.8%	4.8%	4.1%	11.1%	4.8%
	Business is closing/winding down	0	5	2	3	10	9	1	10
		.0%	7.2%	2.9%	4.2%	3.0%	3.1%	2.8%	3.0%
	Total	120	69	69	72	330	294	36	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		What is your annual turnover range?							Total	
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+		Prefer not to say
\$BarriersNewEmployees	Cost of employing	80	42	14	13	1	1	0	13	164
		52.6%	57.5%	51.9%	46.4%	25.0%	25.0%	.0%	31.0%	49.7%
	Lack of work/sales	76	30	8	14	2	1	0	11	142
		50.0%	41.1%	29.6%	50.0%	50.0%	25.0%	.0%	26.2%	43.0%
	Finding suitable/quality staff	44	26	15	12	3	0	0	18	118
		28.9%	35.6%	55.6%	42.9%	75.0%	.0%	.0%	42.9%	35.8%
	Profitability/lack of profits	64	26	6	9	0	0	0	7	112
		42.1%	35.6%	22.2%	32.1%	.0%	.0%	.0%	16.7%	33.9%
	Don't need any more staff	51	21	8	8	2	3	0	18	111
		33.6%	28.8%	29.6%	28.6%	50.0%	75.0%	.0%	42.9%	33.6%
	Lack of funds	47	15	1	6	0	0	0	8	77
		30.9%	20.5%	3.7%	21.4%	.0%	.0%	.0%	19.0%	23.3%
	Finding those who want to work	26	12	7	8	0	1	0	8	62
		17.1%	16.4%	25.9%	28.6%	.0%	25.0%	.0%	19.0%	18.8%
	Lack of cash flow	41	12	0	6	0	0	0	3	62
		27.0%	16.4%	.0%	21.4%	.0%	.0%	.0%	7.1%	18.8%
	Other	8	2	2	2	0	1	0	1	16
		5.3%	2.7%	7.4%	7.1%	.0%	25.0%	.0%	2.4%	4.8%
	Business is closing/winding down	6	3	0	0	0	0	0	1	10
		3.9%	4.1%	.0%	.0%	.0%	.0%	.0%	2.4%	3.0%
	Total	152	73	27	28	4	4	0	42	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%



		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
\$BarriersNewEmployees	Cost of employing	42	3	1	6	2	0	3	14	6	6	14	1	3	59	4	0	164
		58.3%	30.0%	33.3%	46.2%	100.0%	.0%	33.3%	43.8%	46.2%	50.0%	51.9%	33.3%	27.3%	52.7%	57.1%	.0%	49.7%
	Lack of work/sales	34	1	2	5	1	1	1	12	5	2	7	0	4	61	5	1	142
		47.2%	10.0%	66.7%	38.5%	50.0%	100.0%	11.1%	37.5%	38.5%	16.7%	25.9%	.0%	36.4%	54.5%	71.4%	33.3%	43.0%
	Finding suitable/quality staff	31	3	1	5	0	0	3	13	1	2	12	1	5	36	4	1	118
		43.1%	30.0%	33.3%	38.5%	.0%	.0%	33.3%	40.6%	7.7%	16.7%	44.4%	33.3%	45.5%	32.1%	57.1%	33.3%	35.8%
	Profitability/lack of profits	28	0	2	4	1	0	4	10	4	1	5	0	3	44	5	1	112
		38.9%	.0%	66.7%	30.8%	50.0%	.0%	44.4%	31.3%	30.8%	8.3%	18.5%	.0%	27.3%	39.3%	71.4%	33.3%	33.9%
	Don't need any more staff	20	3	0	4	0	1	3	13	6	6	9	1	4	38	2	1	111
		27.8%	30.0%	.0%	30.8%	.0%	100.0%	33.3%	40.6%	46.2%	50.0%	33.3%	33.3%	36.4%	33.9%	28.6%	33.3%	33.6%
	Lack of funds	14	0	2	5	1	0	1	8	3	2	5	1	1	33	1	0	77
		19.4%	.0%	66.7%	38.5%	50.0%	.0%	11.1%	25.0%	23.1%	16.7%	18.5%	33.3%	9.1%	29.5%	14.3%	.0%	23.3%
	Finding those who want to work	22	1	0	4	0	0	1	1	0	3	4	1	2	20	3	0	62
		30.6%	10.0%	.0%	30.8%	.0%	.0%	11.1%	3.1%	.0%	25.0%	14.8%	33.3%	18.2%	17.9%	42.9%	.0%	18.8%
	Lack of cash flow	16	0	2	1	0	0	0	9	3	1	3	0	1	23	3	0	62
		22.2%	.0%	66.7%	7.7%	.0%	.0%	.0%	28.1%	23.1%	8.3%	11.1%	.0%	9.1%	20.5%	42.9%	.0%	18.8%
	Other	4	1	0	1	0	0	0	0	3	1	1	0	0	5	0	0	16
		5.6%	10.0%	.0%	7.7%	.0%	.0%	.0%	.0%	23.1%	8.3%	3.7%	.0%	.0%	4.5%	.0%	.0%	4.8%
	Business is closing/winding down	3	0	0	0	0	0	0	0	0	0	1	1	0	5	0	0	10
	4.2%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	3.7%	33.3%	.0%	4.5%	.0%	.0%	3.0%	
Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	



## Q17: What industry sector do you fall into? Single response.

		Number of years				Total	Size of business		
		0-5 years	6-10 years	11-20 years	Over 20 years		Small <20 employees	Medium 20-199 employees	Total
What industry sector do you fall into?	Retail Trade	37	25	19	31	112	109	3	112
		30.8%	36.2%	27.5%	43.1%	33.9%	37.1%	8.3%	33.9%
	Accommodation & Food Services	25	19	17	11	72	48	24	72
		20.8%	27.5%	24.6%	15.3%	21.8%	16.3%	66.7%	21.8%
	Health Care & Social Assistance	11	4	12	5	32	30	2	32
		9.2%	5.8%	17.4%	6.9%	9.7%	10.2%	5.6%	9.7%
	Professional, Scientific & Technical Services	12	5	3	7	27	24	3	27
		10.0%	7.2%	4.3%	9.7%	8.2%	8.2%	8.3%	8.2%
	Construction	4	3	3	3	13	13	0	13
		3.3%	4.3%	4.3%	4.2%	3.9%	4.4%	.0%	3.9%
	Information Media & Telecommunications	8	2	2	1	13	13	0	13
		6.7%	2.9%	2.9%	1.4%	3.9%	4.4%	.0%	3.9%
	Manufacturing	2	4	3	3	12	10	2	12
		1.7%	5.8%	4.3%	4.2%	3.6%	3.4%	5.6%	3.6%
	Rental, Hiring & Real Estate Services	3	1	3	4	11	11	0	11
		2.5%	1.4%	4.3%	5.6%	3.3%	3.7%	.0%	3.3%
	Administrative & Support Services	5	0	2	3	10	10	0	10
		4.2%	.0%	2.9%	4.2%	3.0%	3.4%	.0%	3.0%
	Financial & Insurance Services	4	3	2	0	9	9	0	9
		3.3%	4.3%	2.9%	.0%	2.7%	3.1%	.0%	2.7%
	Transport, Postal & Warehousing	5	0	0	2	7	7	0	7
		4.2%	.0%	.0%	2.8%	2.1%	2.4%	.0%	2.1%
	Arts & Recreation Services	2	0	1	0	3	3	0	3
		1.7%	.0%	1.4%	.0%	.9%	1.0%	.0%	.9%
	Public Administration & Safety	1	2	0	0	3	3	0	3
		.8%	2.9%	.0%	.0%	.9%	1.0%	.0%	.9%
	Wholesale Trade	0	1	2	0	3	3	0	3
		.0%	1.4%	2.9%	.0%	.9%	1.0%	.0%	.9%
	Education & Training	0	0	0	2	2	0	2	2
		.0%	.0%	.0%	2.8%	.6%	.0%	5.6%	.6%
	Electricity, Gas, Water & Waste Services	1	0	0	0	1	1	0	1
		.8%	.0%	.0%	.0%	.3%	.3%	.0%	.3%
Total		120	69	69	72	330	294	36	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



		What is your annual turnover range?							Prefer not to say	Total
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+		
What industry sector do you fall into?	Retail Trade	56	26	7	6	0	0	0	17	112
		36.8%	35.6%	25.9%	21.4%	.0%	.0%	.0%	40.5%	33.9%
	Accommodation & Food Services	27	18	10	12	0	0	0	5	72
		17.8%	24.7%	37.0%	42.9%	.0%	.0%	.0%	11.9%	21.8%
	Health Care & Social Assistance	13	7	1	3	2	0	0	6	32
		8.6%	9.6%	3.7%	10.7%	50.0%	.0%	.0%	14.3%	9.7%
	Professional, Scientific & Technical Services	13	5	0	2	0	1	0	6	27
		8.6%	6.8%	.0%	7.1%	.0%	25.0%	.0%	14.3%	8.2%
	Construction	3	4	2	0	1	0	0	3	13
		2.0%	5.5%	7.4%	.0%	25.0%	.0%	.0%	7.1%	3.9%
	Information Media & Telecommunications	10	2	1	0	0	0	0	0	13
		6.6%	2.7%	3.7%	.0%	.0%	.0%	.0%	.0%	3.9%
	Manufacturing	4	3	2	2	0	1	0	0	12
		2.6%	4.1%	7.4%	7.1%	.0%	25.0%	.0%	.0%	3.6%
	Rental, Hiring & Real Estate Services	5	3	1	0	0	2	0	0	11
		3.3%	4.1%	3.7%	.0%	.0%	50.0%	.0%	.0%	3.3%
	Administrative & Support Services	6	2	1	1	0	0	0	0	10
		3.9%	2.7%	3.7%	3.6%	.0%	.0%	.0%	.0%	3.0%
	Financial & Insurance Services	5	0	0	0	1	0	0	3	9
		3.3%	.0%	.0%	.0%	25.0%	.0%	.0%	7.1%	2.7%
Transport, Postal & Warehousing	4	1	1	0	0	0	0	1	7	
	2.6%	1.4%	3.7%	.0%	.0%	.0%	.0%	2.4%	2.1%	
Arts & Recreation Services	3	0	0	0	0	0	0	0	3	
	2.0%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.9%	
Public Administration & Safety	2	1	0	0	0	0	0	0	3	
	1.3%	1.4%	.0%	.0%	.0%	.0%	.0%	.0%	.9%	
Wholesale Trade	0	0	0	2	0	0	0	1	3	
	.0%	.0%	.0%	7.1%	.0%	.0%	.0%	2.4%	.9%	
Education & Training	0	1	1	0	0	0	0	0	2	
	.0%	1.4%	3.7%	.0%	.0%	.0%	.0%	.0%	.6%	
Electricity, Gas, Water & Waste Services	1	0	0	0	0	0	0	0	1	
	.7%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.3%	
<b>Total</b>	<b>152</b>	<b>73</b>	<b>27</b>	<b>28</b>	<b>4</b>	<b>4</b>	<b>0</b>	<b>42</b>	<b>330</b>	
	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

**Q18: Do you generally believe that profitability is declining in the retail sector at the moment? Single response.**

		Number of years				Size of business			
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
Do you generally believe that profitability is declining in the retail sector at the moment?	Yes	79	54	55	56	244	213	31	244
		65.8%	78.3%	79.7%	77.8%	73.9%	72.4%	86.1%	73.9%
	No	10	5	3	6	24	23	1	24
		8.3%	7.2%	4.3%	8.3%	7.3%	7.8%	2.8%	7.3%
	Don't know/not sure	31	10	11	10	62	58	4	62
		25.8%	14.5%	15.9%	13.9%	18.8%	19.7%	11.1%	18.8%
<b>Total</b>		<b>120</b>	<b>69</b>	<b>69</b>	<b>72</b>	<b>330</b>	<b>294</b>	<b>36</b>	<b>330</b>
		<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>



		What is your annual turnover range?								Prefer not to say	Total
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+			
Do you generally believe that profitability is declining in the retail sector at the moment?	Yes	113	57	19	23	3	4	0	25	244	
		74.3%	78.1%	70.4%	82.1%	75.0%	100.0%	.0%	59.5%	73.9%	
	No	8	6	2	4	1	0	0	3	24	
		5.3%	8.2%	7.4%	14.3%	25.0%	.0%	.0%	7.1%	7.3%	
	Don't know/not sure	31	10	6	1	0	0	0	14	62	
		20.4%	13.7%	22.2%	3.6%	.0%	.0%	.0%	33.3%	18.8%	
	Total	152	73	27	28	4	4	0	42	330	
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	

		What industry sector do you fall into?																Total
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	
Do you generally believe that profitability is declining in the retail sector at the moment?	Yes	59	6	2	8	0	1	6	21	10	9	18	1	9	87	6	1	244
		81.9%	60.0%	66.7%	61.5%	.0%	100.0%	66.7%	65.6%	76.9%	75.0%	66.7%	33.3%	81.8%	77.7%	85.7%	33.3%	73.9%
	No	3	2	0	0	0	0	2	1	0	1	3	1	0	9	0	2	24
		4.2%	20.0%	.0%	.0%	.0%	.0%	22.2%	3.1%	.0%	8.3%	11.1%	33.3%	.0%	8.0%	.0%	66.7%	7.3%
	Don't know/not sure	10	2	1	5	2	0	1	10	3	2	6	1	2	16	1	0	62
		13.9%	20.0%	33.3%	38.5%	100.0%	.0%	11.1%	31.3%	23.1%	16.7%	22.2%	33.3%	18.2%	14.3%	14.3%	.0%	18.8%
	Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



## Q19: Are any of the following affecting/impacting on your profitability? Multiple response.

		Number of years				Size of business			
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
\$AffectImpactProfitability	Cost of power	69	45	42	56	212	183	29	212
		58.5%	67.2%	60.9%	77.8%	65.0%	63.1%	80.6%	65.0%
	Cost of labour	59	39	38	44	180	154	26	180
		50.0%	58.2%	55.1%	61.1%	55.2%	53.1%	72.2%	55.2%
	Cost of rent	61	45	33	40	179	158	21	179
		51.7%	67.2%	47.8%	55.6%	54.9%	54.5%	58.3%	54.9%
	Lack of sales	54	41	28	29	152	137	15	152
		45.8%	61.2%	40.6%	40.3%	46.6%	47.2%	41.7%	46.6%
	Low margins	53	35	35	29	152	132	20	152
		44.9%	52.2%	50.7%	40.3%	46.6%	45.5%	55.6%	46.6%
	Competition - bricks and mortar	36	26	23	20	105	94	11	105
		30.5%	38.8%	33.3%	27.8%	32.2%	32.4%	30.6%	32.2%
	Local economy	26	18	28	22	94	81	13	94
		22.0%	26.9%	40.6%	30.6%	28.8%	27.9%	36.1%	28.8%
	Competition - online	26	19	19	23	87	80	7	87
		22.0%	28.4%	27.5%	31.9%	26.7%	27.6%	19.4%	26.7%
Lack of tourists	18	24	18	14	74	66	8	74	
	15.3%	35.8%	26.1%	19.4%	22.7%	22.8%	22.2%	22.7%	
Weather	17	22	14	8	61	54	7	61	
	14.4%	32.8%	20.3%	11.1%	18.7%	18.6%	19.4%	18.7%	
Other	9	2	6	5	22	20	2	22	
	7.6%	3.0%	8.7%	6.9%	6.7%	6.9%	5.6%	6.7%	
Total	118	67	69	72	326	290	36	326	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

		What is your annual turnover range?							Total	
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+		Prefer not to say
\$AffectImpactProfitability	Cost of power	91	49	19	22	1	4	0	26	212
		60.7%	69.0%	70.4%	78.6%	25.0%	100.0%	.0%	61.9%	65.0%
	Cost of labour	68	48	20	19	2	3	0	20	180
		45.3%	67.6%	74.1%	67.9%	50.0%	75.0%	.0%	47.6%	55.2%
	Cost of rent	84	41	12	17	1	2	0	22	179
		56.0%	57.7%	44.4%	60.7%	25.0%	50.0%	.0%	52.4%	54.9%
	Lack of sales	84	34	11	10	1	2	0	10	152
		56.0%	47.9%	40.7%	35.7%	25.0%	50.0%	.0%	23.8%	46.6%
	Low margins	75	35	11	14	2	2	0	13	152
		50.0%	49.3%	40.7%	50.0%	50.0%	50.0%	.0%	31.0%	46.6%
	Competition - bricks and mortar	54	20	9	9	1	2	0	10	105
		36.0%	28.2%	33.3%	32.1%	25.0%	50.0%	.0%	23.8%	32.2%
	Local economy	41	21	9	8	1	2	0	12	94
		27.3%	29.6%	33.3%	28.6%	25.0%	50.0%	.0%	28.6%	28.8%
	Competition - online	39	23	4	8	1	2	0	10	87
		26.0%	32.4%	14.8%	28.6%	25.0%	50.0%	.0%	23.8%	26.7%
Lack of tourists	34	18	7	6	0	1	0	8	74	
	22.7%	25.4%	25.9%	21.4%	.0%	25.0%	.0%	19.0%	22.7%	
Weather	28	14	3	7	0	0	0	9	61	
	18.7%	19.7%	11.1%	25.0%	.0%	.0%	.0%	21.4%	18.7%	
Other	11	4	2	1	0	1	0	3	22	
	7.3%	5.6%	7.4%	3.6%	.0%	25.0%	.0%	7.1%	6.7%	
Total	150	71	27	28	4	4	0	42	326	
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	



		What industry sector do you fall into?																
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
	Cost of power	59	4	1	6	1	0	2	21	6	9	13	1	6	75	6	2	212
		81.9%	44.4%	33.3%	46.2%	50.0%	.0%	25.0%	65.6%	50.0%	75.0%	48.1%	50.0%	54.5%	67.0%	85.7%	66.7%	65.0%
	Cost of labour	57	3	1	7	2	0	3	14	3	8	11	0	6	62	2	1	180
		79.2%	33.3%	33.3%	53.8%	100.0%	.0%	37.5%	43.8%	25.0%	66.7%	40.7%	.0%	54.5%	55.4%	28.6%	33.3%	55.2%
	Cost of rent	57	1	1	2	0	0	4	16	4	4	9	0	5	71	4	1	179
		79.2%	11.1%	33.3%	15.4%	.0%	.0%	50.0%	50.0%	33.3%	33.3%	33.3%	.0%	45.5%	63.4%	57.1%	33.3%	54.9%
	Lack of sales	42	1	3	5	1	1	2	12	3	3	7	0	5	62	4	1	152
		58.3%	11.1%	100.0%	38.5%	50.0%	100.0%	25.0%	37.5%	25.0%	25.0%	25.9%	.0%	45.5%	55.4%	57.1%	33.3%	46.6%
	Low margins	44	1	2	8	0	1	2	12	1	5	9	1	4	55	5	2	152
		61.1%	11.1%	66.7%	61.5%	.0%	100.0%	25.0%	37.5%	8.3%	41.7%	33.3%	50.0%	36.4%	49.1%	71.4%	66.7%	46.6%
\$AffectImpactProfitability	Competition - bricks and mortar	35	0	1	3	0	0	1	9	1	1	3	0	6	44	1	0	105
		48.6%	.0%	33.3%	23.1%	.0%	.0%	12.5%	28.1%	8.3%	8.3%	11.1%	.0%	54.5%	39.3%	14.3%	.0%	32.2%
	Local economy	20	1	0	5	1	0	3	8	5	3	5	0	4	35	4	0	94
		27.8%	11.1%	.0%	38.5%	50.0%	.0%	37.5%	25.0%	41.7%	25.0%	18.5%	.0%	36.4%	31.3%	57.1%	.0%	28.8%
	Competition - online	15	3	1	2	0	1	2	10	2	1	3	0	6	39	0	2	87
		20.8%	33.3%	33.3%	15.4%	.0%	100.0%	25.0%	31.3%	16.7%	8.3%	11.1%	.0%	54.5%	34.8%	.0%	66.7%	26.7%
	Lack of tourists	28	0	1	0	0	0	1	2	0	0	2	0	1	39	0	0	74
		38.9%	.0%	33.3%	.0%	.0%	.0%	12.5%	6.3%	.0%	.0%	7.4%	.0%	9.1%	34.8%	.0%	.0%	22.7%
	Weather	27	0	0	2	0	0	1	0	0	0	2	0	2	26	0	1	61
		37.5%	.0%	.0%	15.4%	.0%	.0%	12.5%	.0%	.0%	.0%	7.4%	.0%	18.2%	23.2%	.0%	33.3%	18.7%
	Other	2	3	0	1	0	0	0	3	2	2	6	0	0	2	1	0	22
		2.8%	33.3%	.0%	7.7%	.0%	.0%	.0%	9.4%	16.7%	16.7%	22.2%	.0%	.0%	1.8%	14.3%	.0%	6.7%
	Total	72	9	3	13	2	1	8	32	12	12	27	2	11	112	7	3	326
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%



**Q20: In terms of your holding stock, is it down, up or the same as it was at this time last year? Single response.**

		Number of years					Size of business			
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total	
		Is your holding stock, down, up or the same as it was at this time last year?	Down	12 15.6%	10 20.4%	8 18.2%	17 30.4%	47 20.8%	42 21.2%	5 17.9%
	Same	50 64.9%	30 61.2%	34 77.3%	31 55.4%	145 64.2%	126 63.6%	19 67.9%	145 64.2%	
	Up	15 19.5%	9 18.4%	2 4.5%	8 14.3%	34 15.0%	30 15.2%	4 14.3%	34 15.0%	
	Total	77 100.0%	49 100.0%	44 100.0%	56 100.0%	226 100.0%	198 100.0%	28 100.0%	226 100.0%	

		What is your annual turnover range?								Total
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	
		Is your holding stock, down, up or the same as it was at this time last year?	Down	21 21.6%	14 25.9%	5 26.3%	4 16.0%	1 50.0%	1 25.0%	
	Same	65 67.0%	28 51.9%	13 68.4%	17 68.0%	1 50.0%	2 50.0%	0 .0%	19 76.0%	145 64.2%
	Up	11 11.3%	12 22.2%	1 5.3%	4 16.0%	0 .0%	1 25.0%	0 .0%	5 20.0%	34 15.0%
	Total	97 100.0%	54 100.0%	19 100.0%	25 100.0%	2 100.0%	4 100.0%	0 .0%	25 100.0%	226 100.0%

What industry sector do you fall into?

		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade	Total
		Is your holding stock, down, up or the same as it was at this time last year?	Down	10 19.6%	0 .0%	1 50.0%	4 57.1%	0 .0%	0 .0%	0 .0%	2 12.5%	0 .0%	1 8.3%	0 .0%	0 .0%	4 44.4%	25 26.3%	0 .0%
	Same	38 74.5%	3 100.0%	1 50.0%	3 42.9%	0 .0%	1 100.0%	3 100.0%	12 75.0%	6 75.0%	9 75.0%	10 90.9%	3 100.0%	4 44.4%	47 49.5%	2 100.0%	3 100.0%	145 64.2%
	Up	3 5.9%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	2 12.5%	2 25.0%	2 16.7%	1 9.1%	0 .0%	1 11.1%	23 24.2%	0 .0%	0 .0%	34 15.0%
	Total	51 100.0%	3 100.0%	2 100.0%	7 100.0%	0 .0%	1 100.0%	3 100.0%	16 100.0%	8 100.0%	12 100.0%	11 100.0%	3 100.0%	9 100.0%	95 100.0%	2 100.0%	3 100.0%	226 100.0%



*Q21: Why did you answer this way? Open ended.***Down**

Anticipated decline in client numbers due to lack of parking and facilities  
 Both sales and rental of residential has slowed due to supply of property  
 Business is bad since the replacement of the tram line. And over active parking inspectors. Difficult in restoring the vibrancy of Jetty Road Glenelg.  
 Cash flow (x 2 responses)  
 Cash flow  
 Continued increase of base rents and power  
 Cost of stock is reducing  
 Cost to hold, holding less  
 Don't want to invest any more in stock  
 Due to change in our offering  
 Economy/business downturn (x 11 responses)  
 Economy, holding less  
 Get rid of some old stocks  
 Glum outlook for following 12months  
 I had more bookings last year than this year.  
 It's too costly to hold stock  
 Keeping stock levels lower  
 Lack of sales from walk in customers  
 Less overheads  
 Less stock available  
 Lower sales, we don't need to carry as much.  
 Managing seasonal trends.  
 Margins are tighter than ever  
 N/A - did not provide reason (x 2 responses)  
 Not busy  
 No need to hold stock if business is down  
 Not as busy as last year  
 Not much holding stock you cannot sell  
 Number of listings is lower  
 Our orders are all running late  
 Reducing stock levels  
 We have elected to hold less stock  
 We will be reducing stock due to closing  
 Weak economy, cost up  
 We're dropping prices, so we're losing profit but the sales aren't improving as much as they should or were last year.  
 Workload reduced

**Same**

About the same assets/investments  
 As it means that there are less people out and about and less foot traffic  
 Based on my business  
 Because as of the end of the 2017 it remains unchanged  
 Because it is the same (x 4 responses)  
 Because it is the truth.  
 Because it's true (x 3 responses)



Because turnover similar  
Because we always keep the same amount of stock. It ebbs and flows on a weekly basis as we use and receive orders  
Because we need to have stock on hand  
Business decision to not hold stock and order when required.  
Business same  
Cause it is (x 2 responses)  
Correct  
Do not carry stock  
Do not hold stock as element of my business  
Don't have much  
Don't know, not sure (x 8 responses)  
Don't need more stock  
Due to my beliefs  
Economic situation  
Frustration that out of area Tai Chi teachers occupy Holdfast Bay cheap rental venues  
General lack of confidence by most people that I meet.  
General reflection of the reality.  
Has not changed  
Holding same stock  
I need to keep stock levels up  
I only order what I need  
I only provide services  
In Food industry perishables need to be maintained at certain levels and kept for short duration and then discarded if not used  
Is quite same  
It is kept at a minimum.  
It remains the same per status  
It's the truth  
Just don't have it  
Keep strict stock limits  
No reason given (x 60 responses)  
No change to conditions.  
No changes  
No differences noted  
No reason  
No stock as a marketing agency  
No stock  
Not change from previous year  
Not much stock needed  
Not sure  
Only carry the minimum stock - we are able to forecast well  
Our customers' orders are made to order so stock holding is minimal  
Required levels to run the business.  
Sales are up and down  
Sales down  
Same  
Same as 2016  
Same product provided  
Slow sales



Stock is always kept about the same amount  
 Stock is only ordered as jobs are sold so is relatively static  
 Stock levels are consistent  
 Stock not really applicable to our NFP  
 Stock take last year is sitting at about the same this year  
 That is the way it is!  
 That's my personal opinion  
 This is a fact  
 This is what I believe it to be  
 To which question do you refer?  
 True reply  
 Truth  
 We are just even with the amount of stock on the floor...  
 We hold little stock  
 We hold very little stock and only what we need to do the job  
 We need to hold the required amount of consumables to operate in healthcare  
 We start with fresh stock each today  
 We tend to not hold too much stock.

### *Up*

As turnover increases one has to hold more stock  
 Because I am carrying more stock than this time last year,  
 Because I have more stock  
 Because it was.  
 Because it's up  
 Building up reputation  
 Don't know (x 3 responses)  
 Fact  
 I borrowed money to extend my range of products and buy in bulk to be competitive  
 I have answered as it is because we have a growing successful business but would like the opportunity to discuss in person with the council our section of Glenelg - the Broadway  
 I have re branded  
 It is a nature of my type of business to hold certain amount of stock - limits due to my storage, transportation, etc.  
 It is very hard to clear sale stock as everyone is always on sale and spoilt for choice sooooo many options out there  
 Just recently quite a few of our suppliers have delivered stock all at once.  
 Need to keep larger range to attract customers  
 New stock lines for summer trading  
 Overall costs for all products we purchase increase once twice year yet our pricing to remain competitive and attract locals to get through winter can only be increased between 3-5% but as example meat has increased by 18%  
 Positive growth  
 Reduced sales have meant more stock on hand until reduced purchasing gets it into balance  
 Sales are down which has left me with more stock on hand  
 Season, need to hold more  
 Seasonal (x 2 responses)  
 Seasonal, more for time of year  
 Seasonal/Christmas  
 Seasonal/Christmas  
 Store expansion  
 Things are increasing



To keep up with our market

We have changed our contractors and require that we use our own products as they were supplied over the last 12 months.

We have more stock

Word of mouth has helped my business grow

**Q22: Have you done any business with Council in the last 12 months?**

		Number of years					Size of business		
		0-5 years	6-10 years	11-20 years	Over 20 years	Total	Small <20 employees	Medium 20-199 employees	Total
		Have you done any business with Council in the last 12 months?	Yes	21	11	12	20	64	53
		17.5%	15.9%	17.4%	27.8%	19.4%	18.0%	30.6%	19.4%
	No	99	58	57	52	266	241	25	266
		82.5%	84.1%	82.6%	72.2%	80.6%	82.0%	69.4%	80.6%
	Total	120	69	69	72	330	294	36	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		What is your annual turnover range?								Total
		<\$500k	\$500k-\$1 million	\$1 million - \$2 million	\$2 million-\$5 million	\$5 million-\$10 million	\$10 million-\$50 million	\$50 million+	Prefer not to say	
		Have you done any business with Council in the last 12 months?	Yes	21	16	8	8	0	3	
		13.8%	21.9%	29.6%	28.6%	.0%	75.0%	.0%	19.0%	19.4%
	No	131	57	19	20	4	1	0	34	266
		86.2%	78.1%	70.4%	71.4%	100.0%	25.0%	.0%	81.0%	80.6%
	Total	152	73	27	28	4	4	0	42	330
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%

What industry sector do you fall into?

		What industry sector do you fall into?																	Total
		Accommodation & Food Services	Administrative & Support Services	Arts & Recreation Services	Construction	Education & Training	Electricity, Gas, Water & Waste Services	Financial & Insurance Services	Health Care & Social Assistance	Information Media & Telecommunications	Manufacturing	Professional, Scientific & Technical Services	Public Administration & Safety	Rental, Hiring & Real Estate Services	Retail Trade	Transport, Postal & Warehousing	Wholesale Trade		
Have you done any business with Council in the last 12 months?	Yes	14	4	0	1	1	0	1	4	2	3	4	1	3	25	0	1	64	
		19.4%	40.0%	.0%	7.7%	50.0%	.0%	11.1%	12.5%	15.4%	25.0%	14.8%	33.3%	27.3%	22.3%	.0%	33.3%	19.4%	
	No	58	6	3	12	1	1	8	28	11	9	23	2	8	87	7	2	266	
		80.6%	60.0%	100.0%	92.3%	50.0%	100.0%	88.9%	87.5%	84.6%	75.0%	85.2%	66.7%	72.7%	77.7%	100.0%	66.7%	80.6%	
	Total	72	10	3	13	2	1	9	32	13	12	27	3	11	112	7	3	330	
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	



**Q23: On a scale of 0 to 10, where 0 is poor and 10 is excellent, how would you rate your experience in doing business with Council? Single rating.**

How would you rate your experience in doing business with Council? **7.34**

	0 Poor	1	2	3	4	5	6	7	8	9	10 Excellent	Total
How would you rate your experience in doing business with Council?	1	0	3	3	3	3	7	3	19	7	15	64
	1.6%	.0%	4.7%	4.7%	4.7%	4.7%	10.9%	4.7%	29.7%	10.9%	23.4%	100.0%

NPS experience in doing business with Council **3.12**

**Q24: On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with Council's support for business in the area? Single rating.**

How satisfied are you with Council's support for business in the area? **5.24**

	0 Totally dissatisfied	1	2	3	4	5	6	7	8	9	10 Totally satisfied	Total
How satisfied are you with Council's support for business in the area?	9	7	15	27	17	154	19	33	28	7	14	330
	2.7%	2.1%	4.5%	8.2%	5.2%	46.7%	5.8%	10.0%	8.5%	2.1%	4.2%	100.0%

NPS Council's support for business in the area **-68.79**

**Q25: Do you have any suggestions or ideas on what strategies the City of Holdfast Bay can implement to support better business conditions for you? Open ended.**

171 people chose not to leave a comment, 159 did leave a comment. These are detailed below.

A lot seems to be done for Jetty Road traders but not much for The Marina precinct

Actions require implementation. Help is offered however not followed up.

Advertising

Allow signage

Allow for more appropriate parking hours for visitors. Encourage staff and managers of Foodland and mall stores to park further away than adjacent streets to the Mall. Perhaps encourage the developers/manager to provide a designated staff carpark in the first place to eliminate the need for regulated street parking instead.

Already discussed with relevant CoHB personnel

Assistance lobbying to state government to maintain funding

At 240 Brighton road put a break in the island for north travelling vehicles

Attract more people to area

Attract more visitors (from anywhere) Become the vibrant shopping, eating precinct, fun

Become a role model for lean and effective business strategy



Better ways of spending funds especially on Jetty Rd Glenelg  
 Business hub for small local businesses to network, build skills, access office space/meeting rooms/IT  
 Business marketing, get more function and activities to attract people  
 Car parks are slowly disappearing. Durham Street, Colley Terrace are examples. Car parking expensive i.e. \$5 for any part of an hour at some parks e.g. next to library  
 Cheaper power  
 Cheaper rent make the area more vibrant to attract people  
 Council has no idea what's going on  
 Council need to focus on maintaining the environment conducive to promoting economic activity in the area. It should not involve itself in matters such as gay marriage and other subjective and divisive matters  
 Council should do something to encourage locals to the area  
 Council staff doing a good job. We have a good working relationship with Council. Councils using local suppliers where appropriate is good.  
 Council staff that deal with business on a daily basis seem to generally lack an understanding of business management & the issues that small businesses face on a daily basis. Council needs to train/recruit staff who understand, or have had, business experience.  
 Council to support local business  
 Difficult question to answer - I believe that Henley area is about to hit hard with a range of new offerings which will no doubt have an impact on Jetty Road. The number of retailers are down, rents are up etc...Tough times  
 disruption to trade and loss of income when council engages in civil works in proximity to businesses it hurts personal family incomes for people working for themselves and they are without safety income nets suggest council needs to be super mindful when planning this stuff think of your own personal financial impact if you didn't get paid for a month and you were still expected to meet your business and personal financial obligations and responsibilities!  
 Do not think it applies  
 Don't really deal with the council that much in my industry  
 Drive more people into the area with events and reduced parking costs  
 Drive more visitors to the area through improved public facilities and comfort. Also family friendly events  
 Electricity rebates  
 Employ proactive, forward thinking people, clean up Jetty Road, advertise properly.  
 Encouragement for SMES  
 Ensure more car parking is available i.e. Do not make planning decisions which reduce available car parking  
 Ensure quality internet connection  
 Events that draw crowds to area that utilise many different businesses. Build a world class convention centre in Glenelg, my previous roles with AEG Ogden around south east Audi's and even Darwin has given great organic growth of millions annually that impact all businesses in area as they attract corporate, association and industry delegates to the area.  
 Expos for local businesses  
 Extend zone for properties that can be used as office space. Improve signage on Broadway, Glenelg South (preferable some flags as per Jetty Rd).  
 Facilitating a sustainable island-able local power network capitalising on community based roof top solar generation and battery storage resources.  
 Find that balance between parking and community spaces. Continue to promote Glenelg as a tourist destination  
 Flexible and proactive planning  
 Follow through on enquiries would show some interest. I am still waiting to hear back months later. Have given up.  
 Foot traffic is what we need, so everything should be geared to attracting more people. Most arrive in cars, so we need parking, but we also need good public transport links.  
 Free car parking, and promotion, as per recent innovations at Henley Sq.  
 Generate excitement about the area



Get rid of people with their own agendas. Cut red tape. Some councillors have no idea about running a business they have never had one.

Get rid of the bike path in front of our shops - lower council rates for small business

Get some business people on your staff to advise you

Get the NBN rollout sorted ASAP.

Give back car parks

Have a promotion to get people back to Glenelg

Hold round table discussions with a variety of businesses to enable Council to understand some of the issues facing business rather than second guessing

Holdfast area business directory. I am not a shop owner on Jetty Rd, but operate an Indoor Plant Hire business it corporate clients from Brighton/Seacliff area to the metro area

Holding more social events to encourage people coming down. Also the parking restrictions at Glenelg. Why paying for parking? And increase time limit on jetty road. This is a family community we should be catering for them. Also look into maintenance of this footpath that is not level.

I don't have enough information as to how the City of Holdfast Bay supports the business environment and conditions.

I have never approached the council for any business support so I have no idea what's on offer

I run a "free" Tai Chi/Qigong class, for my students & friends, in the Angus Neill Reserve every Saturday morning. With financial support, this could be promoted for the health and well-being of other Holdfast Bay residents. This type of support has been offered elsewhere e.g. Magill Council, etc.

I'd love to find out why I continue to lose power! And maybe some promotion outside of jetty road

Ideas have been submitted previously but are normally never acted upon or responded to.

If they supported local business to do their repair and maintenance work?

Improve parking

Increase tourism

Increased marketing of Jetty Road as a Shopping destination

Invest in the street

It is not part of the Council's activities to make local businesses more profitable. It should concentrate on making its operation more efficient and provide better services to general ratepayers. Some questions are poorly structured, e.g. about KPIs as not all items are relevant yet they all require a response.

It would help to have bike parking on jetty road Brighton

It's far too rigid and perhaps that has something to do with the residents in our area? Not sure. However chill out on the local business trying to grow and expand. They help other businesses grow and expand. Side walk tables and chairs and liquor licenses could be revised...Also, some street decorations- at night Brighton is active - light it up.

Keep crime down to make customers feel safe in the area to shop

Listen to retailers more. Ease off with parking fines. Do not remove parking spaces from main road.

Local advertising

Local council newsletter and webpage offering free advertising

Longer parking available for our customers to lunch, shop, and wander the stores. And because our demographic isn't young the parking needs to be available close by.

Look at parking restrictions

Look at the mix of offerings on Jetty Road Glenelg. What direction is the council heading? Is it food based, retail based or a mix or just full shops. Have they surveyed the public to see what they would like? e.g. shopping experience or entertainment experience.

Lower rates (x 2 responses)

Lower rates equals lower rent

Manage parking better, allow people to get in and out of their driveways (small streets with parking directly opposite driveways).

Marketing the street to get more people here

Maybe a free networking event??



Maybe come and have a chat  
 Monitor parking in the street  
 more activities to bring the whole family to the beach, not just one day or two, it needs whole week or even longer.  
 More advertising to get people to Glenelg  
 More advertising. Offering incentives to small business. Assist with refits  
 More all day roadside parking  
 More car parking (x 4 responses)  
 More events on Jetty red Brighton. Possibly developing a Brighton square like Henley beach  
 More events to attract more people  
 More festivals and entertainment in the square  
 More Footpath  
 More free parking  
 More parking places  
 More promotion for Jetty Road traders  
 More research on customers  
 Move with the times  
 Much greater transparency in where it spends the business ratepayer money. I feel totally ripped off with council rates  
 Needs more car parking / ATM & public toilets - same complaints all the time  
 Networking opportunities.  
 No it is more of a lack of jobs in Adelaide issue.  
 Not a good idea to reduce parking space in Jetty Road as this will affect and decrease traffic flow in the area.  
 Not sure, more local promotions perhaps  
 Offer more grants to train business owners on technology and marketing etc.  
 Offer longer times in parking bays located near our branch potentially on Rose Street  
 Only look at ideas that will increase the number of car parks on Jetty Road Glenelg and maintain them as free, they should be for only 30 to 60 mins max. Refuse to let any further reductions take place. Adelaide is still a city that people take their cars to everything and the places that provide that for people will be the places people will support  
 Our rent is too high even when the roadworks etc. affected us in a great deal and had no rent relief for this period  
 Paint over graffiti, lose the bike lanes on Brighton road.  
 Parking  
 Parking availability  
 Parking conditions are disgusting people are going to where they can find a shopping centre rather than street parking and pay high fines  
 Parking has to improve  
 Parking improvements  
 Parking is a problem  
 Parking permits for staff, keep the Jetty Road open to cars.  
 Parking still a problem  
 Perhaps more advertising or more ways of promoting jetty road as a shopping precinct not just a place for people to come for an ice cream.  
 Perhaps running business networking opportunities where owners can come and perhaps listen to a speaker on various topics of small business (e.g. leveraging social media or how to actively grow your business) and then have the rest of the time chatting to others but also encouraging everyone to keep moving onto another person to engage in conversation.  
 Promote it as a destination  
 Promoting Small Business  
 Provide more parking in the vicinity of Jetty Road Brighton. Somehow!  
 Reduce annual council fee. Already have less revenue, can't afford more  
 Reduce costs of doing business



reduce council rates and stop wasting rate payer's money so people have more money in their weekly budgets - for example cancel the NYE party at Glenelg, it only brings trouble, and drunken destruction, and mess that needs cleaning up. It does nothing for local businesses or rate payers but allows free loaders to come into the area, get free entertainment, and wreck whatever they can - for free, because they think no-one cares.

Reduce red tape in building and development applications 8 weeks for a carport is ridiculous. Engage more with local business in the light industrial area and listen to real issues without fobbing them off

Relax shopping hours - streamline more with eastern states

Remove barriers to business, remove petty bureaucracy, and prioritise business needs and job creation over vocal and negative minorities

Remove bicycle lane from Brighton Road.

Rent assistance and advertising

Review the council rate premiums to assist business in being more profitable.

Small business meetings - networking events- Small business courses - communicating council's plans for next 12 months

Solve the parking problems in Jetty road

Someone that actually has a position in council to communicate with businesses on a regular basis as we do not hear from anyone so hard to give feedback?

Something to draw more people to Glenelg

Speed up the road works as it impedes our traffic flow to and from appointments

Stop allowing more salons from opening every 5 minutes - enough is enough

Stop paid parking to entice more people to spend the day at Glenelg

Support more tourism and organize more events to bring more people to the area.

Support organising events for families with young children, where vendors can advertise their products.

Tai Chi & Qigong are scientifically proven health practises. Local residents could benefit from classes and Council provided activities.

Take away bike lanes from Brighton road & put back to Beach paths! Or get rid of restrictions at least!!

Talk more to all businesses operated in the area

The council has been great at holding special events in our strip on jetty road Brighton

The planning department need a shake up

To promote Glenelg more to try to bring back people to the street. Perhaps reduce the council rates for traders in Jetty Road Glenelg, as a reprieve for what they have gone through over the past 12 months with tram line replacement and now the water replacement.

Traders annoyed (customers vote) /food and wine festival

Try to lower overall rising cost to businesses. More support in encouraging local business to use each other keeping in the Councils area rather using overseas business .Use the people that you want to use you!

Unite landlords for common vision which happens at Harbour town and Marion Westfield

Use local business suppliers

Use local businesses

We find the council to have minimal focus on real strategies to assist small business

We have only just starting receiving the newsletters as management changed over 12 months ago, we let the council know the change, so communication to send us the newsletters would have been better.

We need more people to have jobs, too many redundancies so people are holding onto their money, no confidence in the future.

We pay higher council rates than most of suburban. But we don't think we get all the support and help to survive in the tough time for business.

Workshops like Adelaide city council provided to east end traders: digital marketing, visual and merchandise skills.

Many more about understand Chinese tourists for Glenelg businesses.

Yearly meetings, talking about any opportunities for growth and development.

Yes thanks



Yes. Measure with results. More action

*Q26: Optional. Enter here for your chance to win a \$200 shopping voucher.*

154 people chose to enter the draw.









## 7. QUESTIONNAIRE

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

Q2: How many people (including management and owners) did your business employ in the current quarter (September, 2017)? Single response.

- 1
- 2-19
- 20-49
- 50-99
- 100-149
- 150-199
- 200+

Q3: What is your annual turnover range? Single response.

- <\$500k
- \$500k-\$1 million
- \$1 million - \$2 million
- \$2 million-\$5 million
- \$5 million-\$10 million
- \$10 million-\$50 million
- \$50 million+
- Prefer not to say

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

- Male
- Female
- Skilled
- Unskilled
- Full time employees
- Part time employees

Q5: Is your business currently connected to the NBN? Single response.

- Yes
- No
- Don't know/not sure

Q6: On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with the NBN connection?

Totally dissatisfied	0	1	2	3	4	5	6	7	8	9	Totally satisfied
Migration process to NBN											
Internet connection											

Q7: Why did you rate your NBN migration/connection that way? Open ended.

Q8: Does your business transact online?

- Yes
- No



Don't know/not sure

Q9: Do you invest in eCommerce or digital platforms to aid business transactions? i.e. buying and selling of goods and services, or transmitting funds or data, primarily using the internet. Single response.

Yes

No

Don't know/not sure

Q10: On a scale of 0 to 10, where 0 is totally unimportant and 10 is totally important, how important are intrastate, interstate and international visitors to your business? Rate all 3 options.

	Totally unimportant										Totally important	
	0	1	2	3	4	5	6	7	8	9	10	N/A
Intrastate												
Interstate												
International												

Q11: How do you expect the following economies to perform over the next 12 months? Rate all 3 options.

	Weaker	Slightly weaker	Same	Slightly stronger	Stronger
National economy					
South Australian economy					
Local council area economy					

Q12: How would you describe the following business KPIs in the Q3 September quarter of 2017? Were they up, down or about the same as the previous quarter? Rate all KPIs.

	Down	Same	Up	N/A/Don't know
General business conditions				
Total sales/revenue				
Average wages				
Export sales				
Non-wage labour costs (on-costs, i.e. Superannuation, payroll taxes, etc.)				
Selling prices				
Profitability				
Number of employees				
Overtime worked				
Investment in buildings and structures				
Investment in plant and equipment				
Investment in eCommerce				

Q13: How do you expect the same business KPIs to perform in Q4 of 2017? Were they up, down or about the same as the previous quarter? Rate all KPIs.

	Down	Same	Up	N/A/Don't know
General business conditions				
Total sales/revenue				
Average wages				
Export sales				
Non-wage labour costs (on-costs, i.e. Superannuation, payroll taxes, etc.)				
Selling prices				



Profitability  
Number of employees  
Overtime worked  
Investment in buildings and structures  
Investment in plant and equipment  
Investment in eCommerce

Q14: Thinking about the next 12 months, how confident do you feel about your business prospects? Single response.

Extremely confident  
Fairly confident  
Neutral  
Fairly worried  
Extremely worried

Q15: As far as business is concerned, what problems, if any, are you facing at the moment? Multiple response.

Lack of work or sales  
Finding or keeping staff  
Cash flow, bad debts or profitability  
Competition  
Paperwork or bureaucracy  
Economic climate  
Costs or overheads  
Taxes  
There are no problems at the moment  
Other (please specify) \_\_\_\_\_

Q16: What are the barriers to taking on new employees? Multiple response.

Lack of work/sales  
Finding suitable/quality staff  
Cost of employing  
Lack of funds  
Profitability/lack of profits  
Don't need any more staff  
Business is closing/winding down  
Finding those who want to work  
Lack of cash flow  
Other (please specify) \_\_\_\_\_

Q17: What industry sector do you fall into? Single response.

Accommodation & Food Services  
Administrative & Support Services  
Arts & Recreation Services  
Construction  
Education & Training  
Electricity, Gas, Water & Waste Services  
Financial & Insurance Services  
Health Care & Social Assistance  
Information Media & Telecommunications  
Manufacturing





Name \_\_\_\_\_  
Email \_\_\_\_\_

