

# Business Confidence Survey Report 2019

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City of Holdfast Bay

13 December 2019

**Intuito**  
MARKET RESEARCH

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# 1. Introduction

Intuito is delighted to present the findings for Council's biennial Business Confidence Study which is designed to measure business confidence and evaluate this against a national quarterly business study. The aim is to identify where local businesses sit against a national framework. This is the third study of its kind whereby Intuito conducted studies in 2015 and 2017 and compared the findings with the Australian Chamber of Commerce Business Confidence Survey in 2015 and the National Sensis study in 2017. The findings for this 2019 study will be compared with the latest Sensis Business Index which was published in November, 2019 and based on the Q3 of the calendar year.

Specific objectives for the Business Survey include:

- Ascertain current and forecast level of business confidence of 300 Holdfast Bay businesses and service providers and align the survey with the national Sensis Business Survey of SMEs.
- Seek opinions on how the City of Holdfast Bay can develop strategies that will support business conditions.

## Methodology

A combination of online and intercept methods were deployed in order to achieve the sample of 300 business decision makers in order that it matched Council's industry profile and geographic spread and deliver the widest representative coverage. Industry type and geographic location will be used as variables within the analysis of the data to determine variations if they exist.

Business surveys are notoriously difficult to achieve responses as many business owners claim disinterest and busyness as the primary excuses for lack of engagement. They generally struggle with understanding the benefit associated with Council's need for undertaking the survey. The online sample was obtained by using email addresses compiled from the previous studies, Jetty Road traders and additional databases provided by the Business Development unit within Council. This data was derived from the ABN open source databases and further supplemented by previous business users of Council's YourView platform, merged into separate datasets segmented by suburb within the Holdfast Bay Council precinct

The quality of the ABN data was particularly poor with the first round of invitations across each dataset producing undeliverable emails of between 12% and 19%, averaging 15% undeliverable in the first instance. Subsequent requests to remove recipients were received with each round of reminders. The requests were based on not being a business, not conducting business within the precinct, contact no longer relevant, not interested.

Data set	Original Total	Undeliverable	Revised Total
Glenelg Jetty Road & past respondents	763	19%	618
Glenelg North	829	14%	715
Glenelg South	373	16%	313
Glenelg East	646	13%	561
Brighton	553	14%	470
Brighton North	286	12%	252
Hove	433	14%	374
Somerton Park	828	17%	688
Seacliff	335	12.5%	293
Total	5,046	15%	4,288

\* Note: Seacliff Park data was not sent as the majority of addresses fell into the City of Marion precinct.

The online invitations were despatched on Wednesday 6 November and remained active until Wednesday 4 December. Two reminders were sent during this period to encourage participation.

Responses were supplemented with intercept interviewing and whilst the interviewer carried a tablet for immediate completion, there were several instances that required the interviewer to return in order to meet with the business decision maker. The interviewer was in the field from Tuesday 19 November through to Wednesday 4 December and visited locations in Glenelg, Somerton, Brighton and Hove.

Hosting Platform	Visitors	Complete	Completion Rate
Intuito online	123	76	62%
Your Business Holdfast Bay (YourView)	308	92	30%
<i>Subtotal online</i>		<i>168</i>	<i>56%</i>
Intercepts	132	133	100%
<i>Subtotal intercept/face to face</i>		<i>133</i>	<i>44%</i>
Total	563	301	53%

As with the previous surveys, an incentive to maximise responses was offered in the form of a \$200 shopping voucher.

The survey consisted of 24 questions and took an average of 9 minutes to complete.

As a part of the analysis a business confidence index will be applied to the results outcomes with comparisons made against the national, state and local economies. Furthermore comparisons will be made against the 2015 and 2017 findings where practicable.

The business survey questionnaire can be found at the back of this report.



## 2. Findings at a glance

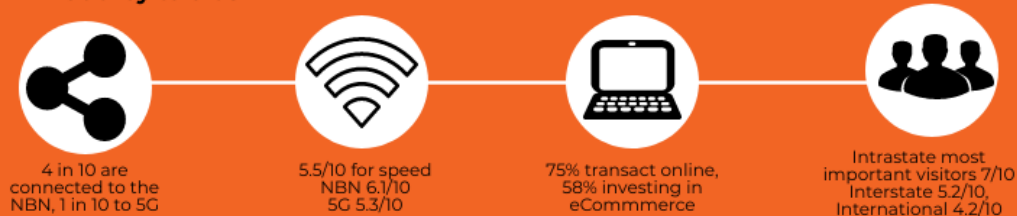
At a glance

# City of Holdfast Bay Business Survey Snapshot

### Who was surveyed

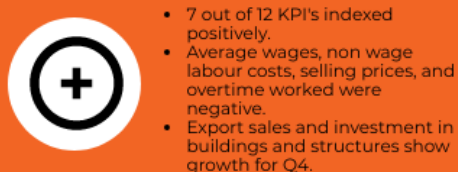


### What they told us



- Expectations for the SA economy over the next 12 months are slightly higher when compared to the National or local economy.
- Just 21% of local businesses expect the local economy to be stronger with just over a third expecting a weaker outlook and 44% the same.
- Local businesses are less confident about the National economy compared to the Sensis Business Index sample however more confident about the SA economy than the Sensis sample.
- Glenelg & Seacliff businesses, medium sized businesses, those operating for 11+ years and retail are more likely to expect the local economy to weaken.

### Business KPI's



### Local Business Confidence



### Prime concerns

- Costs or overheads
- Economic climate
- Taxes
- Lack of work or sales
- Slightly more businesses claiming no problems this survey (12% compared to 9% in 2017)

### Barriers to hiring

- 4 in 10 say they do not need more staff.
- 62% claim cost of employing, finding suitable/quality staff, lack of work/sales and profitability/lack of profits are the main barriers.

### Profitability

- 77% believe profitability is declining in the retail sector.
- Cost of rent most prevalent factor followed by local economy, cost of labour, lack of sales.
- Cost of power is less of an issue this survey compared to the last indicating a very different environment.

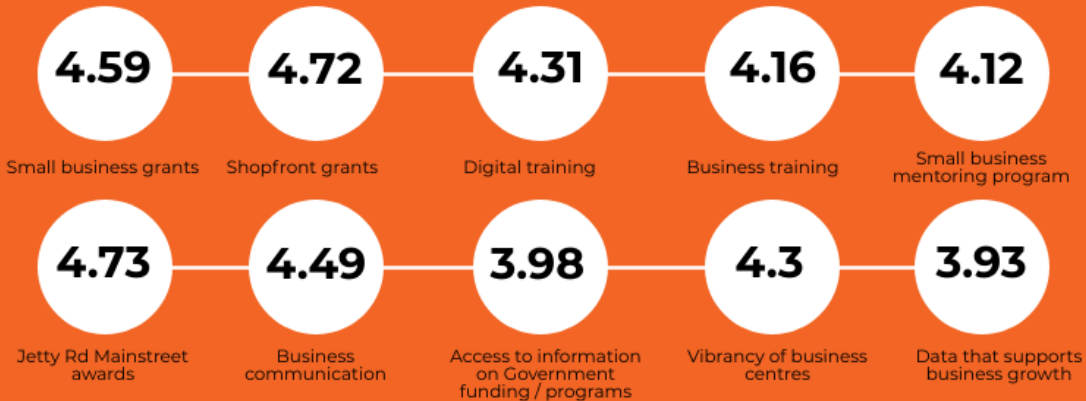
At a glance

# City of Holdfast Bay Business Survey Snapshot

## Experience with Council - scores out of 10



## Satisfaction with Council's support for business - scores out of 10



## Other comments

- Common themes were the perennial parking problem, Jetty Road Glenelg looking tired and dull, better communication with business of grants and other assistance, Council needs to do more to attract business to the area, generally offer more support for business and some safety concerns in and around Glenelg.

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## 3. Executive Summary

### About the respondents

Six in ten businesses that were surveyed were Glenelg businesses and four in ten were from a mix of Somerton Park, Brighton, Hove and Seacliff. Around half of the sample (48%) of the businesses were Retail or Accommodation and Food Services but 14 other industry sectors were represented in smaller percentages. The average length of time in business in the area for this sample was 12 years with the largest percentage of newer businesses of 0-5 years followed by an even spread of 6-10 years, 11-20 years and 20+ years. The majority of businesses employ 2-19 people (65%) but single employee businesses was relatively high at 28%. The vast majority of businesses (93%) were small businesses with only 7% being medium. There were no large businesses employing over 200 people in the sample.

45% of the sample had a turnover of less than \$500,000 per annum, with 18% \$500,000-\$1 million pa, 9% \$1 million to \$2 million, and 6% \$2 million to \$5 million. There were considerably more businesses this year that preferred not to say their annual turnover (21%). The employment ratio has remained the same at slightly more females than males, with considerably more skilled workers than unskilled, and there are slightly more full time workers than part time.

### Internet connection

Nearly four in ten businesses say they are connected to NBN but there was nearly a quarter of all businesses who did not know if they were connected and a further quarter who gave other responses such as ADSL. This compares to only 4% of businesses two years ago who claimed to be connected via NBN. 12% of businesses say they are connected via 5G. Interestingly 73% of Hove businesses claim to be connected to the NBN, 54% of Seacliff businesses, 49% of Brighton and Somerton Park businesses but only 28% of Glenelg businesses.

All businesses were asked how satisfied they were with the speed of their internet connection and the overall rating was 5.5 out of 10. Those connected to NBN rated it higher at 6.1, and those connected via 5G rated it 5.3.

### Businesses transacting online and eCommerce

There has been a steep increase in the percentage of businesses transacting online with 75% of all businesses doing so in 2019 compared to only 35% in 2017.

There has also been an increase in the percentage of businesses investing in eCommerce from 44% in 2017 to 58% in 2019. Those more likely to invest in eCommerce are Somerton Park and Brighton businesses, those who have operated for more than 20 years, medium sized businesses, and those turning over \$500,000-\$5 million. Those least likely to invest are Seacliff and Hove businesses, those businesses that have operated for 6-20 years and those businesses turning over less than \$500,000pa.

### Importance of visitors to local businesses

Intrastate visitors are rated the most highly at 7 out of 10 (although this has slipped from 7.5 in 2017). Interstate visitors are rated second highest at 5.2 which is exactly the same as 2017 and international has increased from 3.7 to 4.2.

## Expectations for economic performance in the next 12 months

Expectations are slightly higher for the South Australian economy over the next 12 months compared to the National or local Council area economies. The local economy expectations show 20.6% of businesses expect it to be stronger, 43.9% the same and 35.5% weaker. In 2017 the figures were similar (19.4% stronger, 49% same, and 31.5% weaker so there are more businesses that are pessimistic in 2019 compared to 2017).

When we compare our sample to that of confidence in the National economy against the National Sensis Business Index, our sample is less confident about the next 12 months. However, our sample is considerably more confident in the South Australian economy compared to Sensis.

Those expecting the local economy to weaken are more likely to be Glenelg and Seacliff businesses, those businesses that have operated for 11+ years, medium sized businesses, those businesses turning over \$1 - \$50 million and the Retail Trade.

## Business KPIs for Q3 compared to expectations of Q4 in 2019

Of the 12 business KPIs, 7 indexed positively. Those that indexed negatively were average wages, non-wage labour costs, selling prices, and overtime worked.

KPI	Q3 2017	Q3 2019	Movement	Q4 2019
General business conditions	43.3	59.44	↑	45.28
Total sales/revenue	45.65	54.95	↑	42.01
Average wages	58.79	46.99	↓	43.35
Export sales	45.19	58.91	↑	52.12
Non-wage labour costs	64.35	39.03	↓	37.82
Selling prices	51.90	49.21	↓	46.40
Profitability	36.92	61.65	↑	49.81
Number of employees	45.75	51.50	↑	48.65
Overtime worked	52.89	50.47	↓	46.28
Investment in buildings and structures	38.61	52.11	↑	51.20
Investment in plant and equipment	43.86	48.51	↑	50.00
Investment in eCommerce	42.23	47.51	↑	48.28

Moving into Quarter 4 however, the indices show a decline in almost all KPIs with two exceptions (export sales and investment in buildings and structures).

## Business confidence

52% of local businesses report feeling confident about their prospects for the year ahead with 20% feeling worried. Confidence is down slightly compared to the National and South Australian Sensis confidence figures although it is not significant.

Confidence level	Local Council Area	South Australia	National
Confident	52.2%	55%	56%
Worried	19.9%	21%	20%
Net balance	+32.3	+34	+36

## Prime business concerns

The prime business concerns are costs or overheads, economic climate, taxes and lack of work or sales. Three of these concerns (except taxes) are the same as 2017 but cash flow, bad debts and profitability was higher in 2017 as was competition. There are slightly more businesses (12% compared to 9% in 2017) that say they have no problems at the moment.

## Barriers to hiring new staff

Nearly four in ten businesses say they do not need more staff. The remaining 62% claim that the cost of employing, finding suitable/quality staff, lack of work/sales and profitability/lack of profits are the main barriers to hiring new staff.

## Retail sector profitability

Just over three quarters of all businesses believe that profitability is declining in the retail sector with a further 16% who say they do not know. Only 8% believe it is not. These figures are similar to the 2017 figures.

## Factors affecting profitability

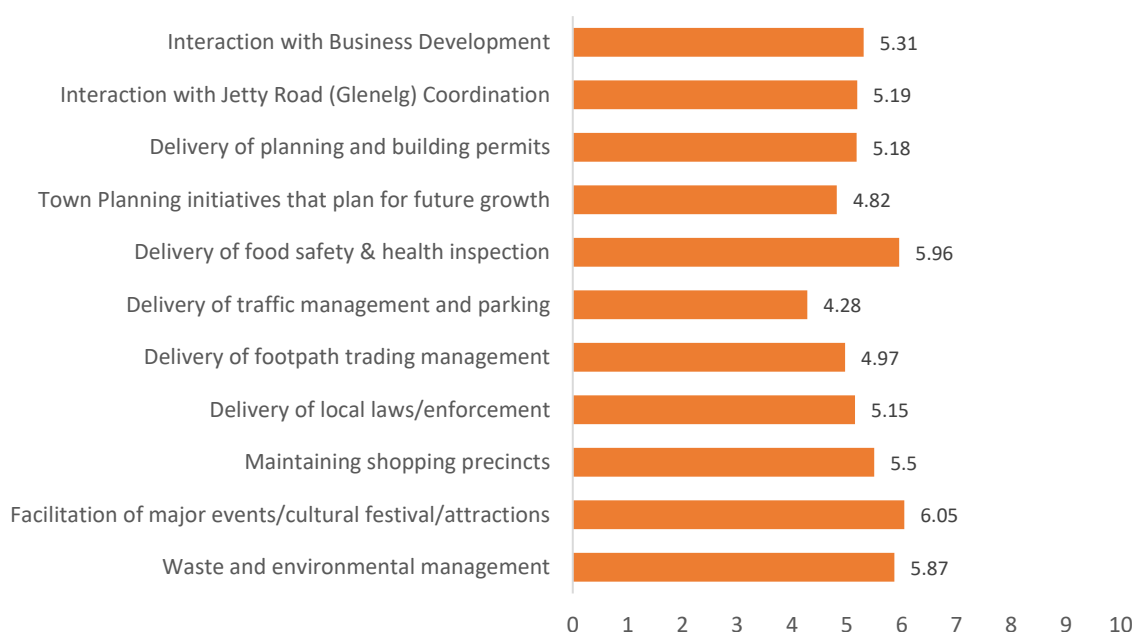
Whilst power costs was the most quoted factor in 2017 this has slipped to fifth place. Cost of rent is the most prevalent factor in 2019, followed by local economy, cost of labour and lack of sales. The current environment is considerably different to that of 2017.

## Business with Council and ratings for experience

Only 17% of the total sample had done business with Council in the last 12 months and the reason for doing business was again varied and disparate.

This year for the first time we asked all respondents to rate the experience in doing business with Council. There were 11 types of experiences and the ratings ranged from 4.28 to 6.05 out of 10.

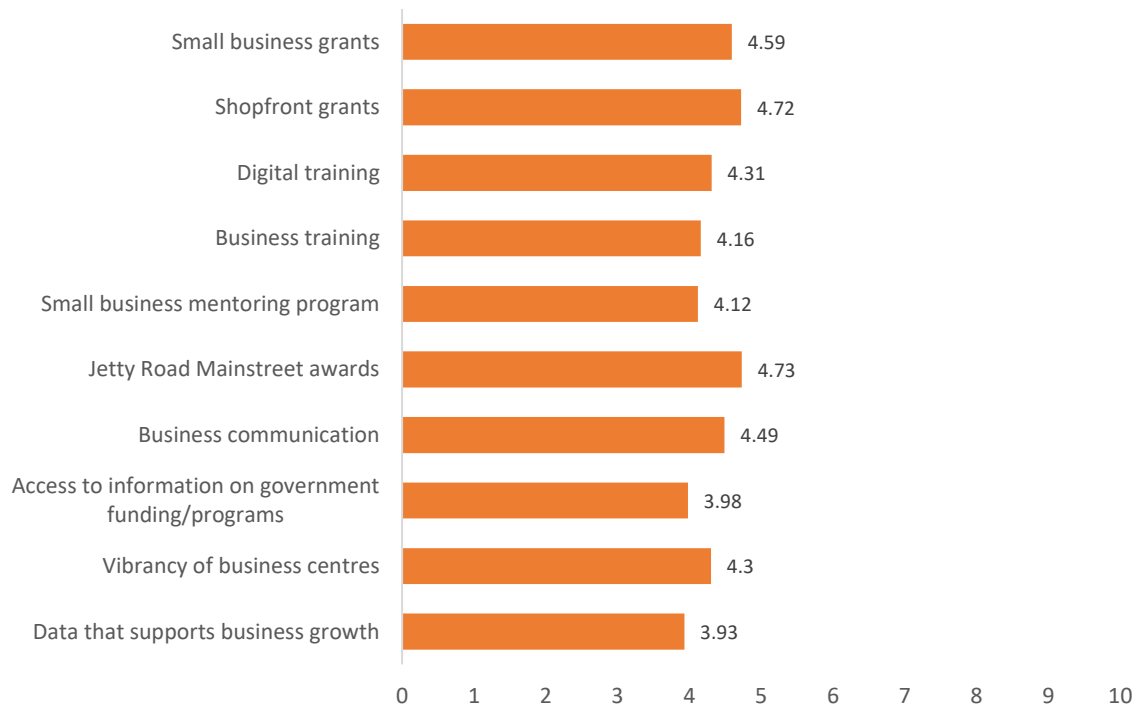
Rating the experience in doing business with Council



## Satisfaction ratings with Council's support for business

For the first time we also asked respondents to rate their level of satisfaction with various Council business initiatives. The ratings we believe are low possibly due to a low level of awareness of the initiatives.

Satisfaction ratings for Council's support for business in the area



## Other comments

116 respondents chose to provide other suggestions or ideas to Council to support better business conditions. The common themes were the perennial parking problems, Jetty Road Glenelg looking tired and dull, better communication with business of grants and other assistance, Council needs to do more to attract business to the area, generally offer more support for business and some safety concerns in and around Glenelg.

## Conclusions

Factors have changed for local businesses since 2017 but many things have remained the same. NBN connections have expanded significantly over the past 2 years as has the incidence of businesses investing in eCommerce. Intrastate visitors are the most important compared to interstate or international.

Business attitude to the State economy is more positive than for the National economy but there are slightly more local businesses that are pessimistic than there were two years ago. Confidence levels are lower than the comparative National Sensis Business study and Glenelg and Seacliff businesses are more likely to expect the local economy to weaken in the next 12 months.

Business KPIs for Q3 have improved considerably between 2017 and 2019 with the exception of average wages, non-wage labour costs, selling prices and overtime worked, however, the Q4 outlook is trending downwards. The primary concerns remain similar to 2017 and are costs or overheads,

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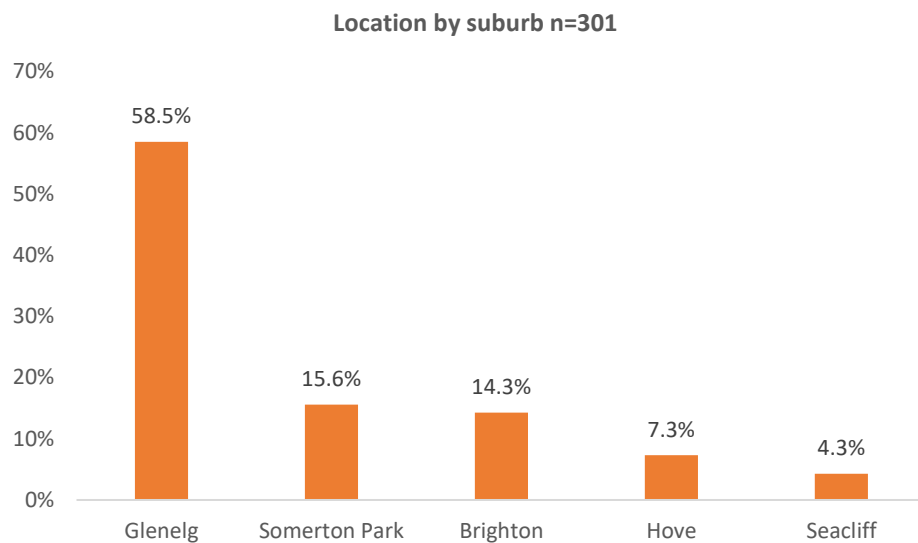
economic climate, taxes and lack of work or sales. Barriers to hiring new staff are similar to 2017 and are the cost of hiring, finding suitable staff, lack of work sales and lack of profits.

It appears to be a well-held belief that profitability in the retail sector is declining with over three quarters of all businesses agreeing – this is very similar to two years ago. The major factors affecting business profitability are the local economy, cost of labour and lack of sales and the current environment which is very different to that of 2017.

Similar numbers of businesses this year had conducted business with Council as there were two years ago. Businesses were asked to rate their experience and the ratings were poor to average as were their satisfaction ratings for the support Council gives to business but we believe this might be more a factor of lack of awareness of Council's initiatives – a factor that could be rectified with communication strategies moving forward.

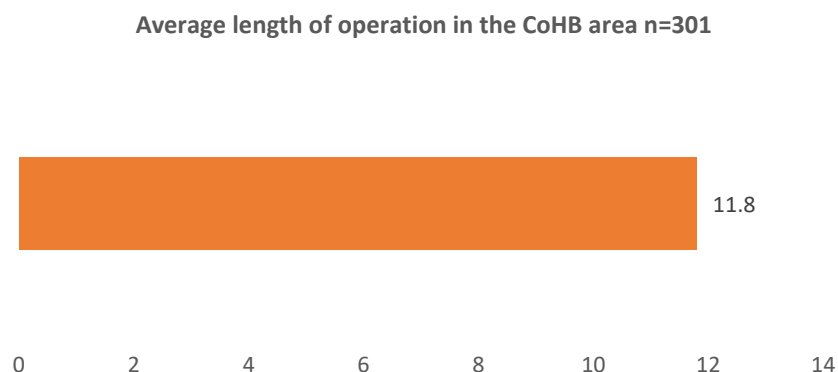
## 4. Key Findings

### Q1. In which suburb is your business located?



The above percentages show nearly six in ten businesses surveyed operating out of Glenelg (Glenelg East, Glenelg South and Glenelg North), with four in ten outside of Glenelg including Brighton (South and North), Somerton Park, Hove and Seacliff.

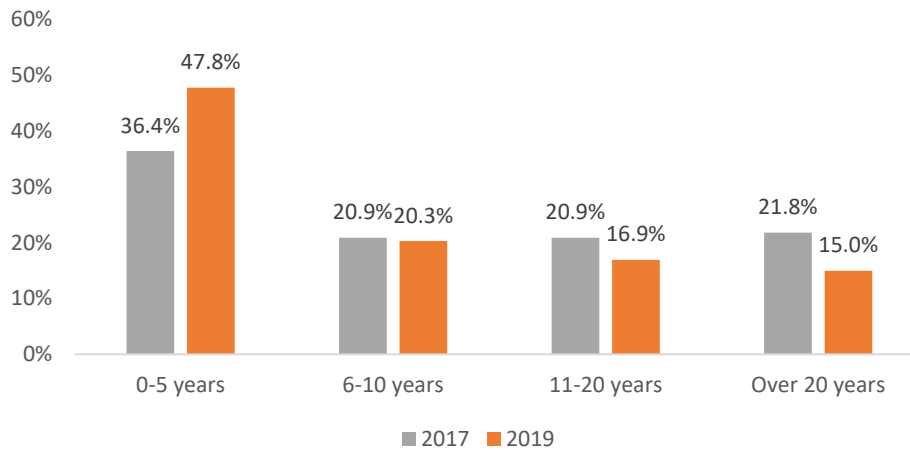
### Q2. How long has your business operated in the City of Holdfast Bay Council area?



The mean length of time across all businesses surveyed was 11.8 years with a median of 7 years and a mode (the most commonly nominated number) of 1. This compares to a mean of 14.7 years, a median of 9.5 years and a mode of 3 in 2017. This indicates that there are many new businesses in the area but we caution that some of the difference may be due to sampling.

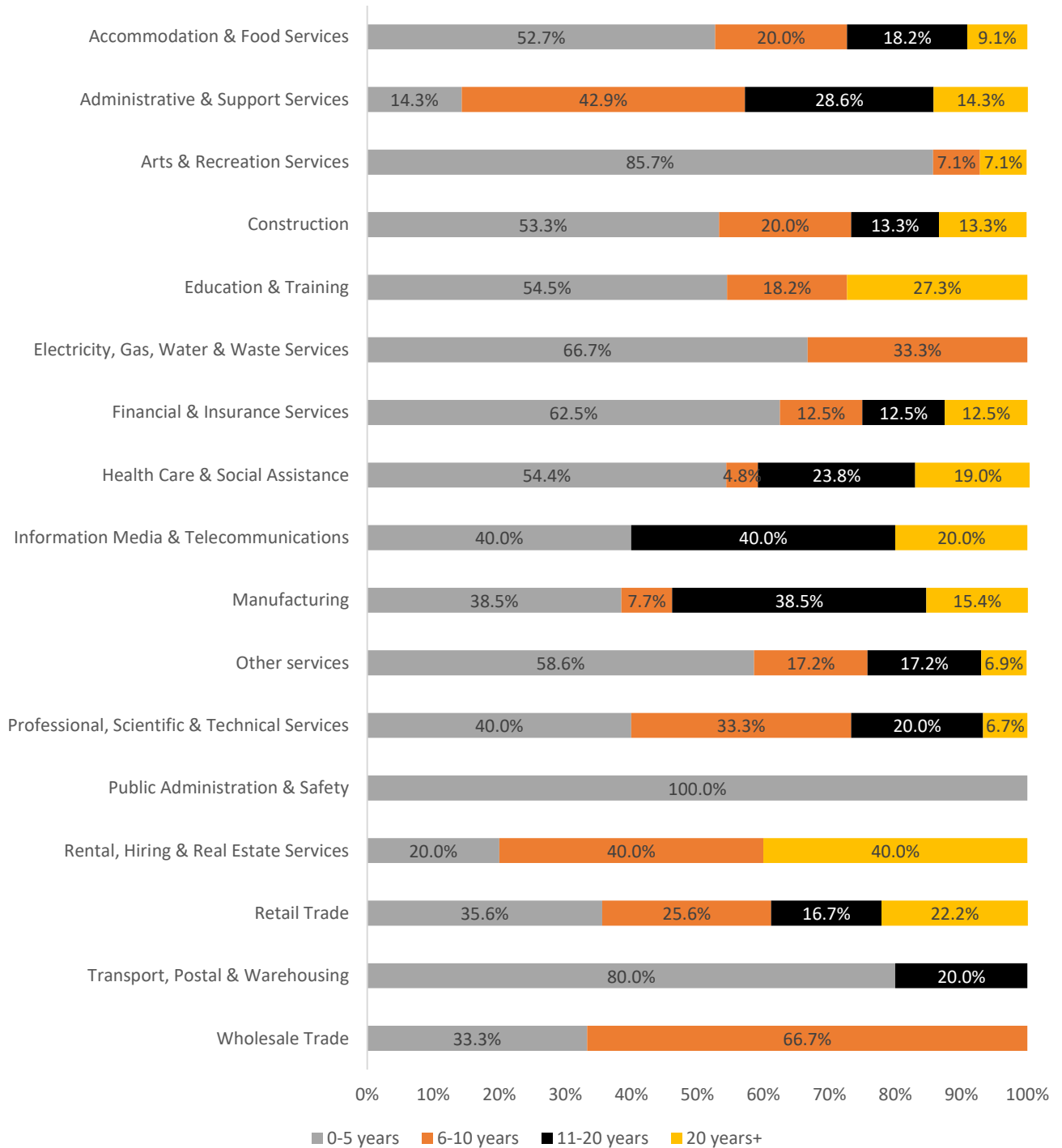


Percentage of businesses by number of years in operation n=301  
2017 and 2019

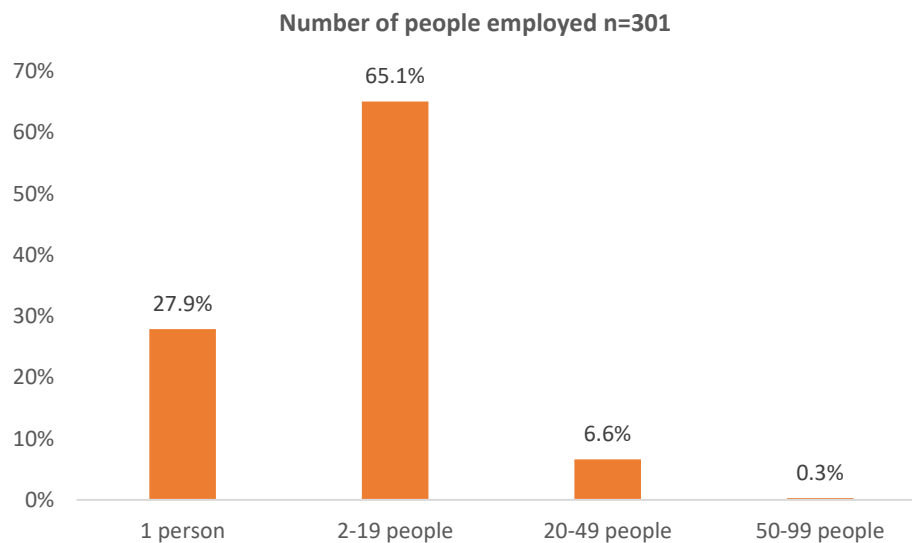


We surveyed more businesses that have operated a short time this year than in 2017. Businesses in Brighton and Hove are more likely to have operated for 0-5 years. Seacliff businesses are more likely to have operated for 6-10 years. Somerton Park businesses are more likely to have operated for 11-20 years and Somerton Park and Hove businesses and medium sized businesses are more likely to have operated for over 20 years.

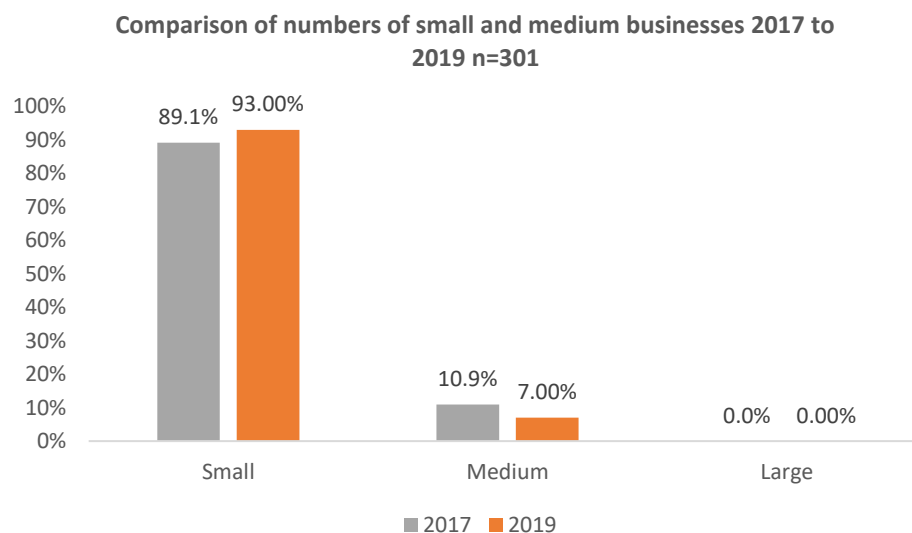
Length of operation by industry sector n=301



**Q3. How many people (including management and owners) did your business employ in the current quarter (September 2019)?**

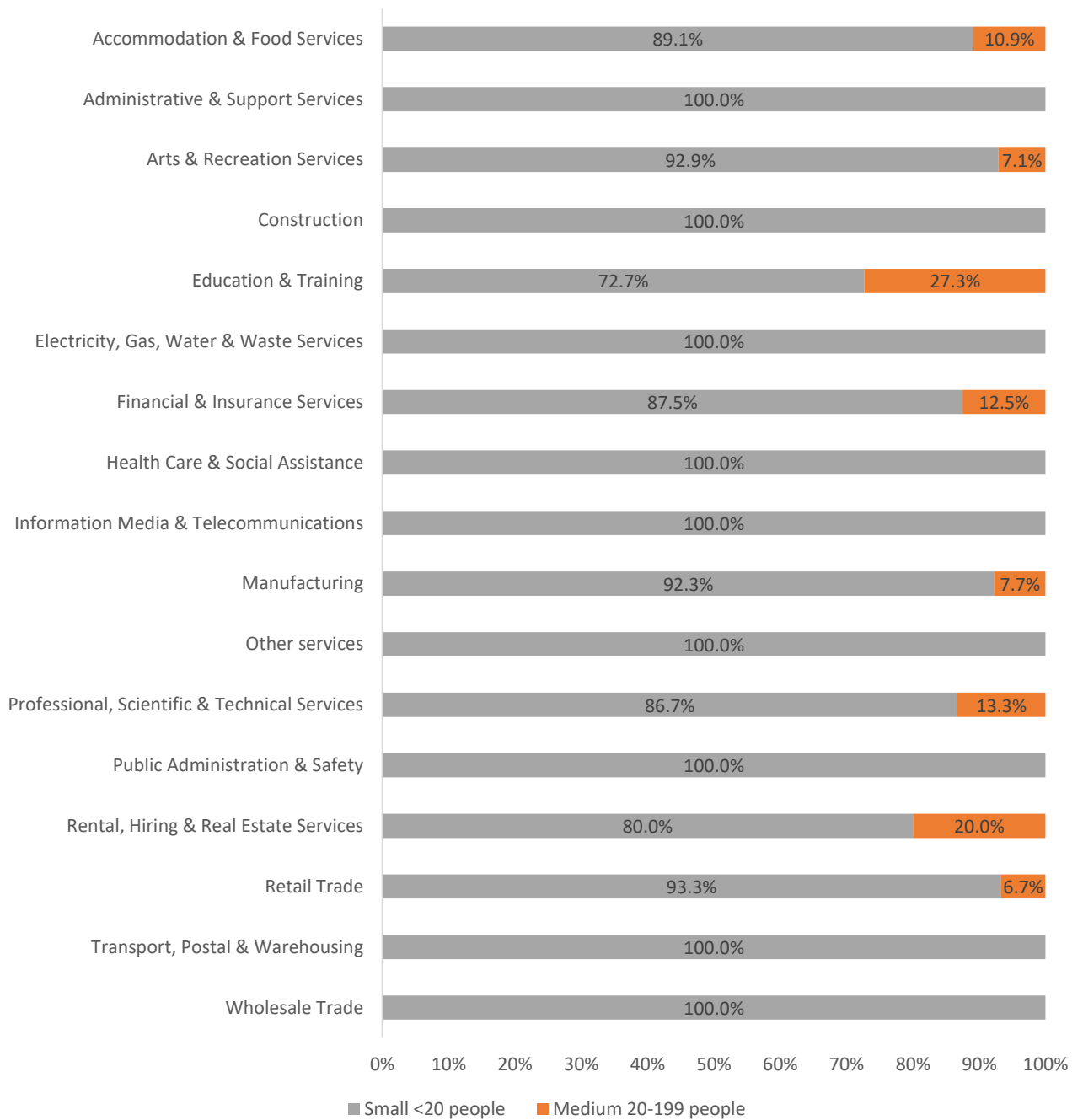


The majority of businesses employ 2-19 people.



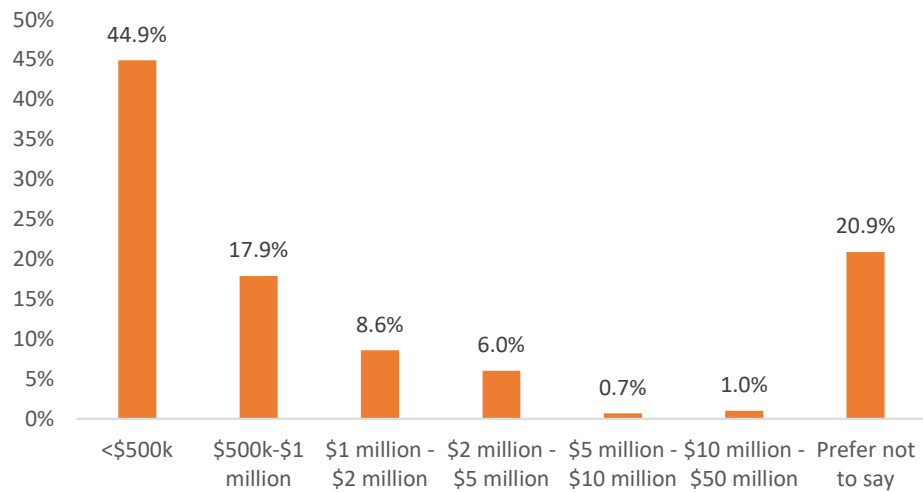
This year (as in 2017) all businesses are classified as SME's with 93% of the businesses being small (less than 20 employees) and 7% medium sized (20-199 employees). There are slightly more small businesses this year compared to 2017.

### Size of business by industry sector n=301



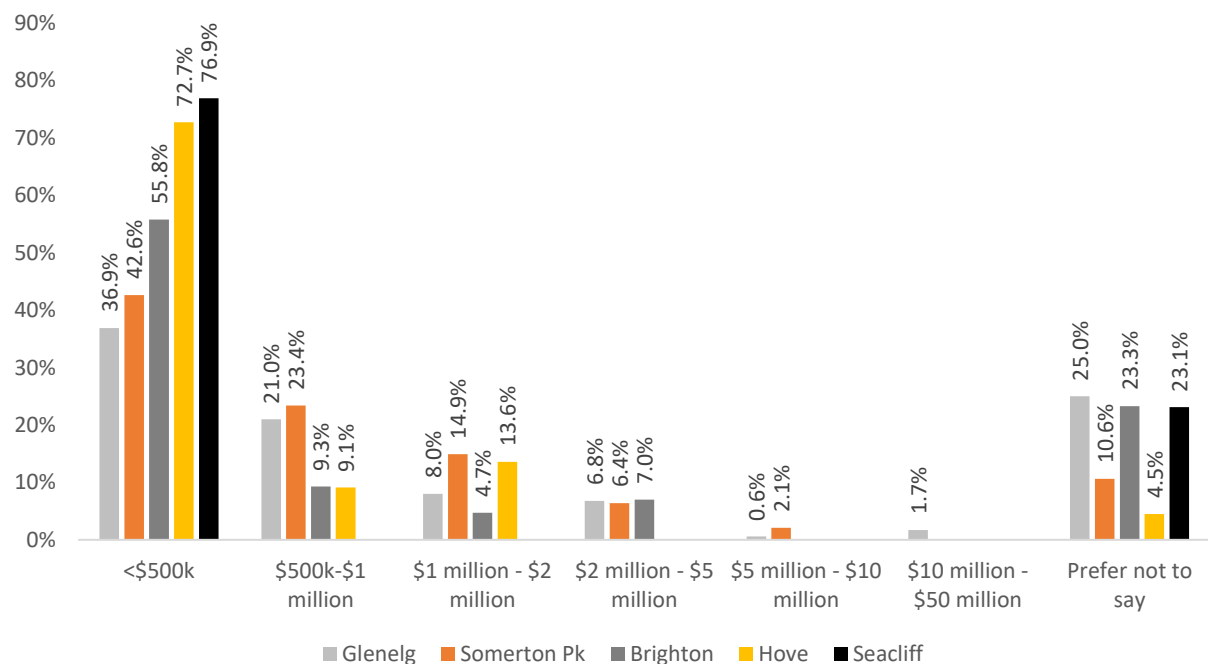
#### Q4. What is your annual turnover range?

Annual turnover for businesses n=301



The annual turnover figures are similar to 2017 but this year we encountered considerably more businesses that preferred not to reveal their turnover (21% compared to 13% in 2017).

Annual turnover by suburb n=301



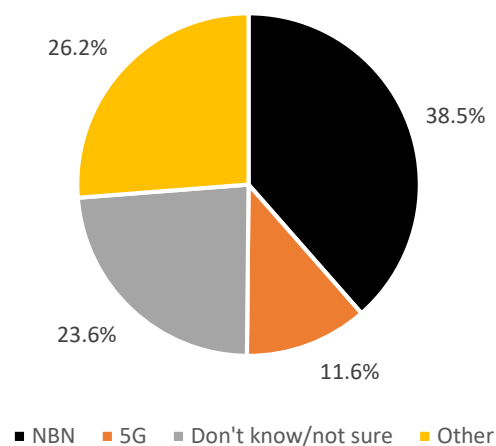
**Q5. What ratio of each of the following do you employ on a full time basis to the nearest 10 percent?**



The above ratios are very similar to 2017. Male and female ratios are the same but this year we did ask people to nominate if they were non binary (16 people out of 301 indicated that they were) but we have not included this in the above ratios as a ratio can only be between two points. There are slightly more full time workers this year than in 2017.

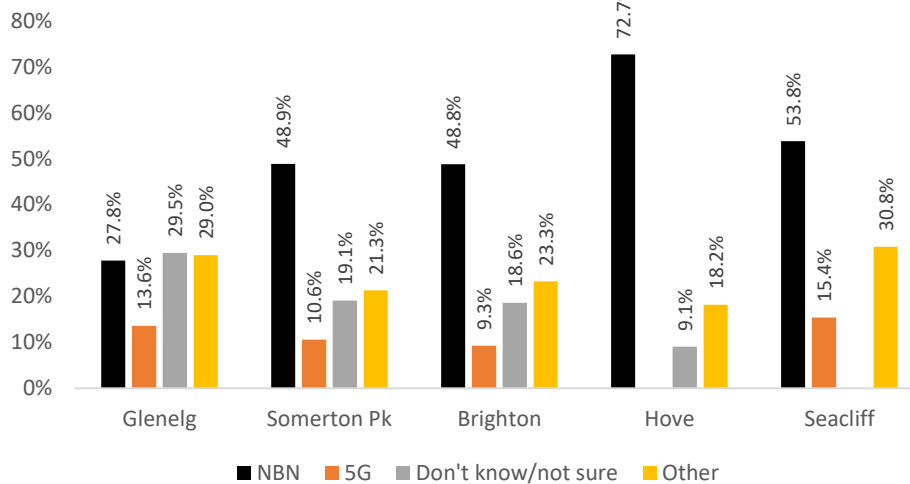
**Q6. Which of the following internet connections does your business currently use?**

Incidence of internet connections all businesses n=301



Nearly four in ten claim their internet connection is with NBN compared to 12% with 5G. The other responses were mostly ADSL or other derivatives meaning that some people do not understand a lot about their internet connection. These figures are considerably higher than 2017 where only 4% of all businesses claimed to be connected to NBN.

Internet connections by business by suburb n=301

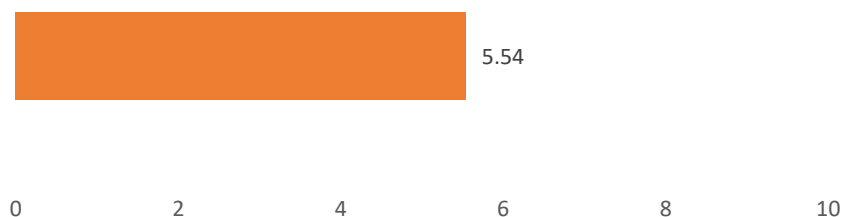


Medium sized businesses are more likely to nominate an NBN connection, those that have been in business 6-10 years, those turning over less than \$500,000pa and those businesses inC, education and Training, Financial and Insurance Services, Health Care and Social Assistance, Manufacturing, Professional, Scientific and Technical Services and Transport, Postal and Warehousing.

Those more likely to nominate 5G as their internet connection are also medium sized, who have operated over 20 years, and in the industry sectors of Arts & Recreation Services, Construction, Transport, Postal & Warehousing, Wholesale Trade and Other Services.

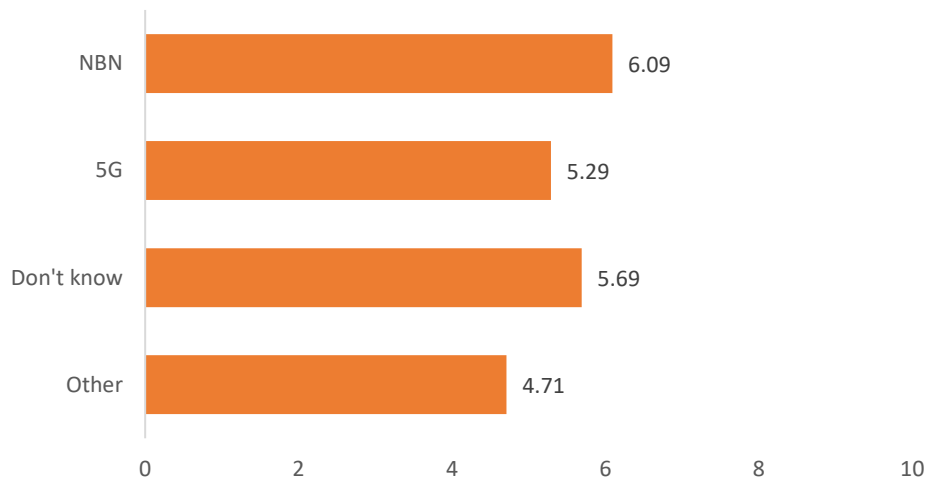
**Q7. On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with the speed of your internet connection?**

Overall satisfaction with the speed of internet connection  
n=301



The overall satisfaction is low at 5.5. The level of satisfaction has not improved since 2017 where it also scored 5.5 for connection (although it did not specify speed in the last iteration of this survey). Those businesses operating from Brighton and Hove are more likely to rate the connection above the average.

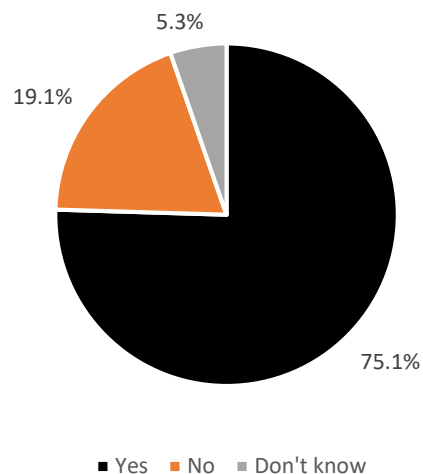
Satisfaction of speed of internet by provider n=301



NBN is the most highly regarded of other options but it is still a poor rating at 6.1 out of 10.

#### Q8. Does your business transact online?

Incidence of businesses transacting online n=301



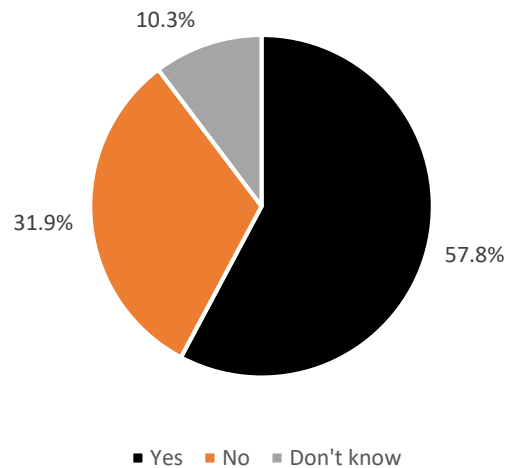
Three quarters of businesses claim to transact online. Those more likely to do so are medium sized businesses, those turning over \$1-\$2 million, and those in Administrative & Support Services, Arts & Recreation Services, Construction, Education and Training, Financial & Insurance Services, Information, Media & Telecommunications, Professional, Scientific & Technical Services, and Public Administration & Safety.

There has been a substantial increase in the number of businesses transacting online since 2017 when only 35% of businesses claimed to do so.



**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.**

Investing in eCommerce or digital platforms n=301

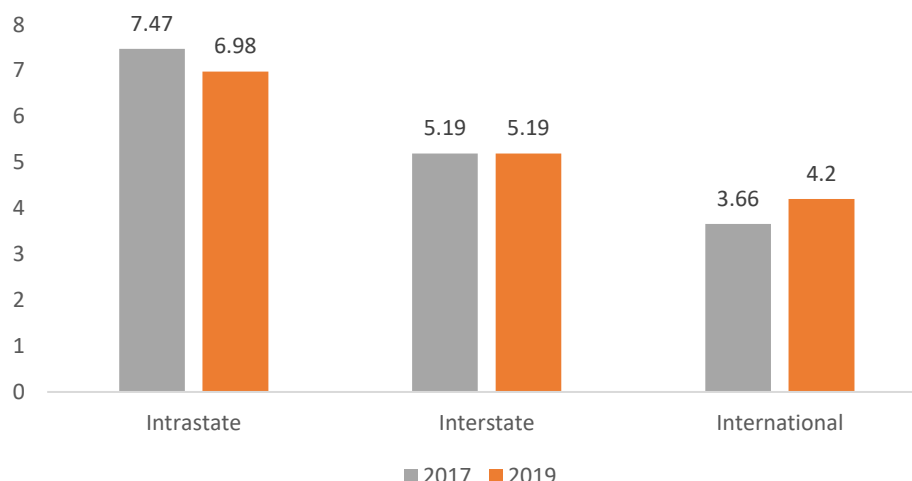


58% of all businesses surveyed claim to invest in eCommerce or digital platforms compared to only 44% in 2017. Those more likely to invest are businesses in Somerton Park and Brighton, those who have operated for more than 20 years, medium sized businesses, those turning over \$500,000-\$5 million and those offering Art & Recreation Services, Electricity, Gas, Water & Waste Services, Financial & Insurance Services, Public Administration & Safety, and the Retail Trade.

Those least likely to invest are Seacliff and Hove businesses, those businesses that have operated between 6 and 20 years, and those businesses turning over less than \$500,000pa.

**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?**

Importance of visitors to businesses n=301

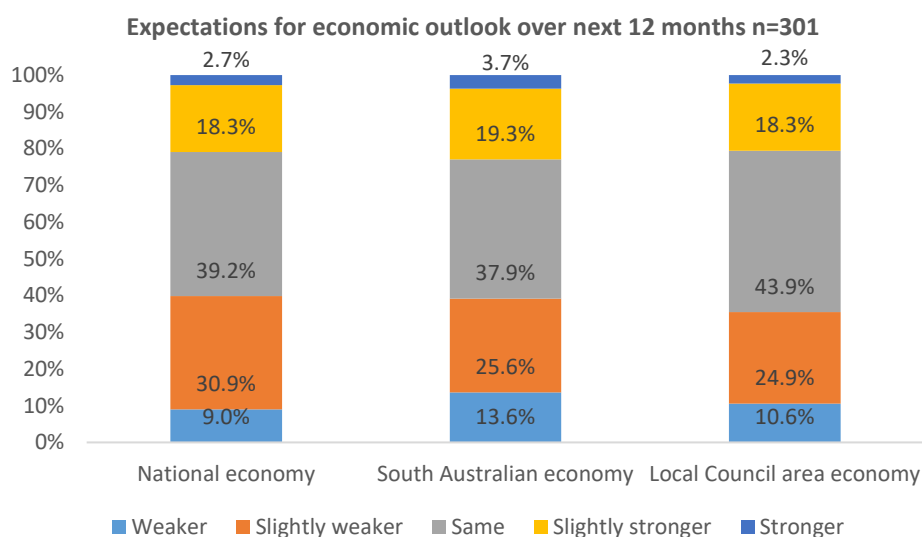


Similar results have occurred this year compared to 2017. Those more likely to rate intrastate important over the average are businesses in Glenelg, those that have operated for 11+ years, medium sized businesses, those turning over \$2-\$5 million and those offering Accommodation & Food Services, Electricity, Gas, Water & Waste Services, Rental, Hiring & Real Estate Services, Retail Trade, Transport, Postal & Warehousing and Wholesale Trade.

Those businesses more likely to rate interstate important over the average are businesses in Glenelg, those operating for 6-10 years and over 20 years, and those offering Accommodation & Food Services, Rental, Hiring & Real Estate Services, Retail Trade, and Transport, Postal & Warehousing.

Those businesses more likely to rate international important over the average are businesses in Glenelg, that have been in business 6-10 years and over 20 years, medium sized businesses, and those offering Accommodation & Food Services, Public Administration & Safety, Rental, Hiring & Real Estate Services, Retail Trade and Transport, Postal & Warehousing.

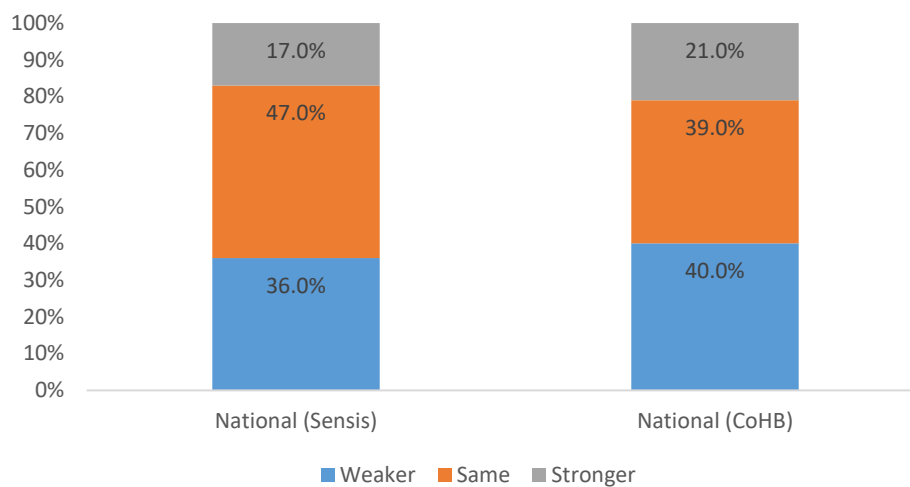
### Q11. How do you expect the following economies to perform over the next 12 months?



Confidence in the economies has worsened somewhat since 2017 with a greater percentage of businesses expecting economies to be slightly weaker and weaker at the expense of stability. The same percentage of optimists remain however.

## National economy

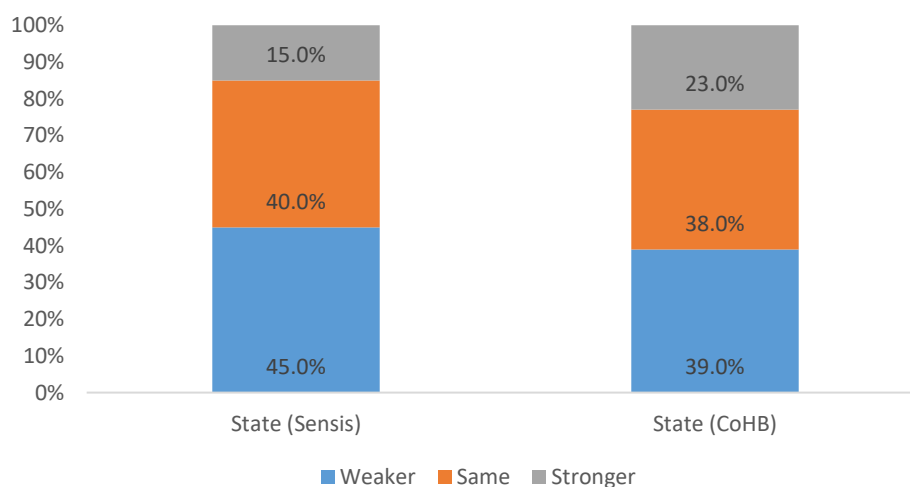
Expectation for National economy Sensis vs CoHB Survey n=301



Whilst the local Council businesses feel slightly more pessimistic than the National Sensis study of 1,000 SME's across Australia toward the National economy, local CoHB confidence is slightly higher than the national average at the expense of remaining the same. The local community are less confident in 2019 when compared to 2017 with only 26% thinking the national economy would be weaker, 52% staying the same and the same number (22%) thinking it will improve in 2017.

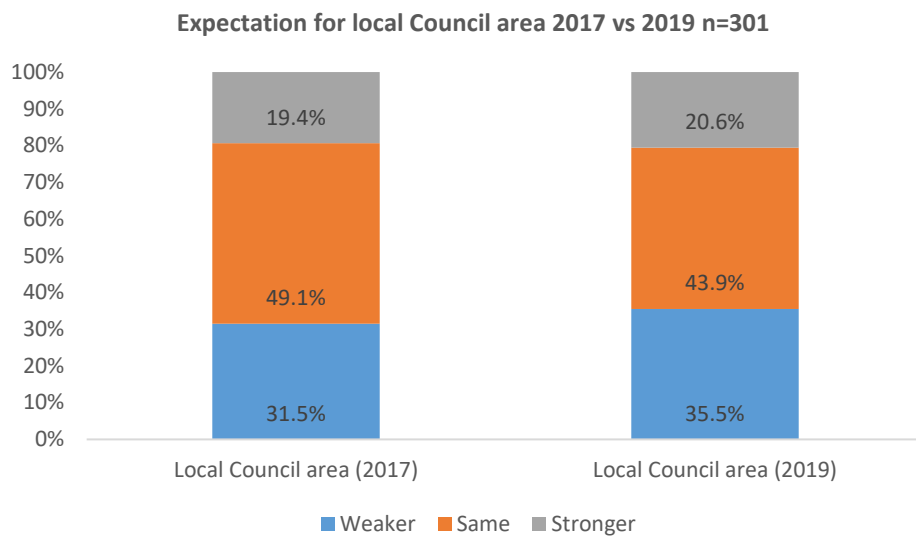
## South Australian economy

Expectation for State economy Sensis vs CoHB n=301



The local Council businesses are more optimistic about the South Australian economy than the National Sensis average with fewer thinking it will be weaker, roughly the same thinking it will remain stable and more that think it will be stronger. This State expectations have improved since 2017 when 43% thought it would weaken, 40% stay the same and 17% be stronger.

## Local Council area economy

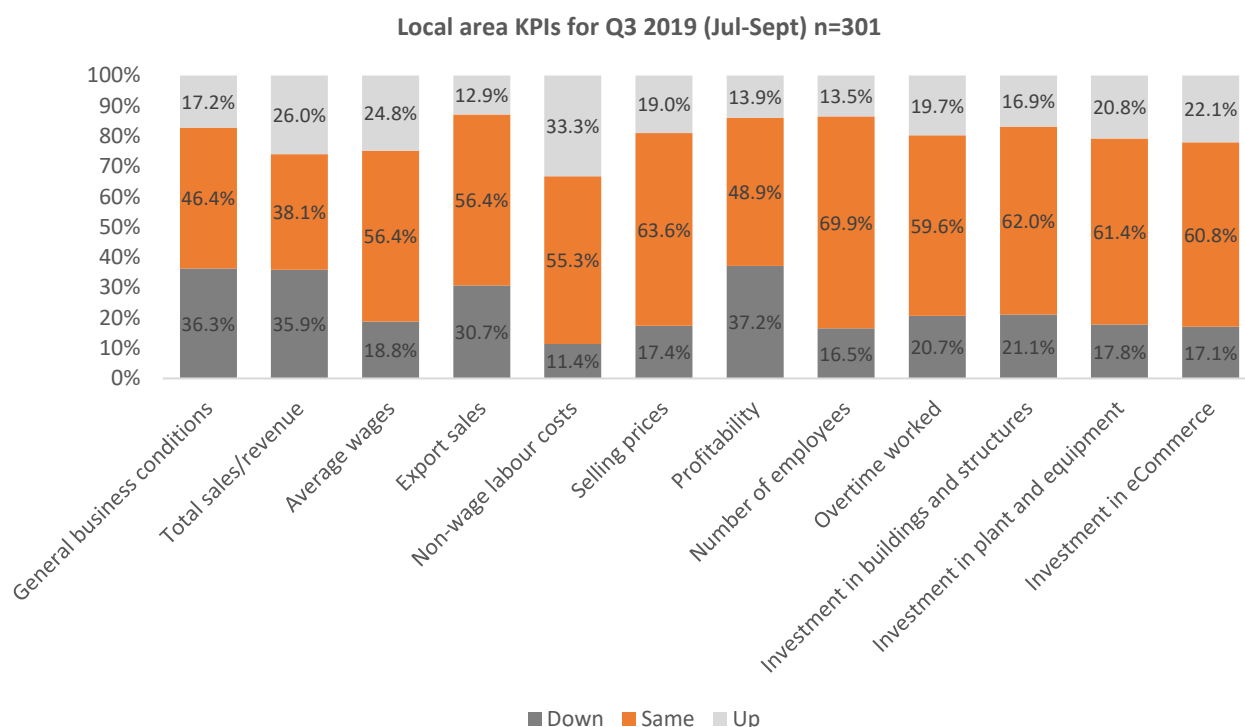


There is no comparison against Sensis for the local Council area so we have compared the results this year to 2017. The same percentage of businesses remain optimistic but slightly more businesses are more pessimistic this year than previously.

Those expecting the local economy to weaken are more likely to be Glenelg and Seacliff businesses, those businesses who have operated for 11+ years, medium sized businesses, those businesses turning over \$1 - \$50 million, and the Retail Trade. Those expecting the local economy to stay the same are those businesses in Brighton and Seacliff and those that have been in business for 0-5 years and those turning over less than \$500,000pa.

Those expecting the local economy to be stronger are more likely to be businesses in Somerton Park, medium sized businesses, those turning over \$500,000=\$1 million pa and those in the Retail Trade.

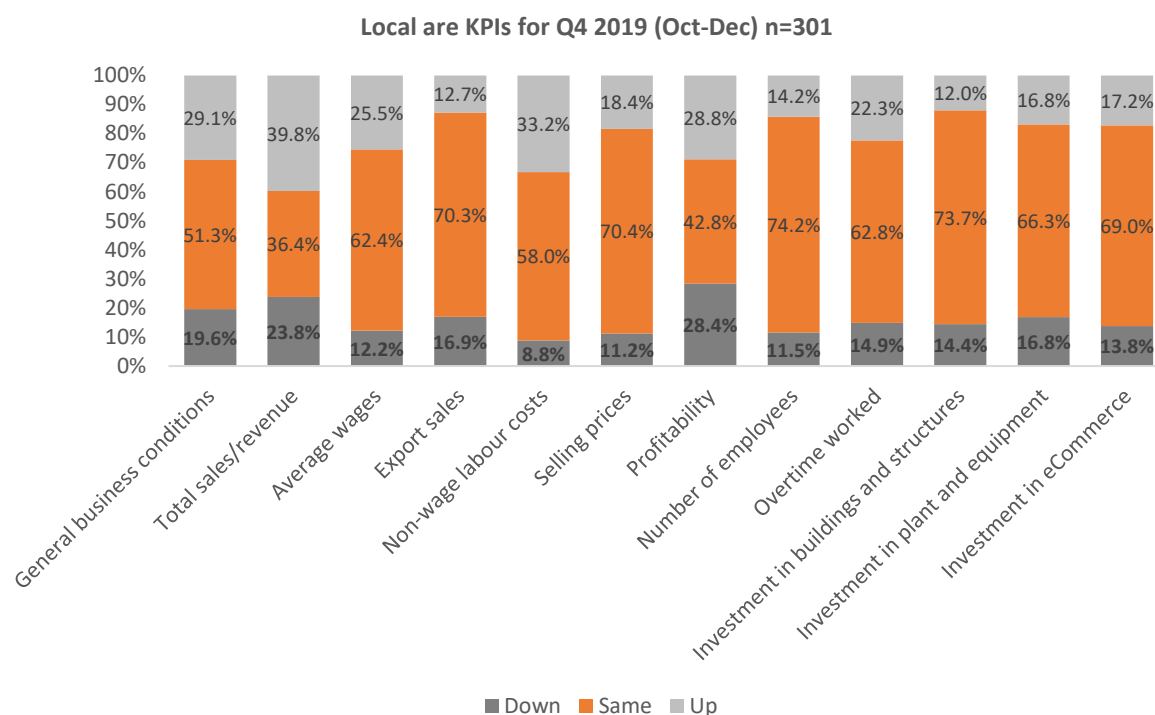
**Q12. How would you describe the following business KPIs in the Q3 September quarter of 2019? Were they up, down or about the same as the previous quarter?**



The KPIs that have declined since 2017 are general business conditions, total sales/revenue, average wages, export sales, non-wage labour costs and selling prices. The KPIs that have improved this round of research include number of employees, overtime worked, investment in building and structures, investment in plant and equipment and investment in eCommerce. The only KPI to remain the same was profitability which has seen a very slight improvement. We applied an index to the statistics. An index of anything over 50 indicates that it is improving, an index of anything less than 50 shows it is declining and a score of exactly 50 shows no movement.

	Up	Same	Down	Local Index Q3 2019
General business conditions	17.2%	46.4%	36.3%	59.44
Total sales/revenue	26%	38.1%	35.9%	54.95
Average wages	24.8%	56.4%	18.8%	46.99
Export sales	12.9%	56.4%	30.7%	58.91
Non-wage labour costs	33.3%	55.3%	11.4%	39.03
Selling prices	19%	63.6%	17.4%	49.21
Profitability	13.9%	48.9%	37.2%	61.65
Number of employees	13.5%	69.9%	16.5%	51.50
Overtime worked	19.7%	59.6%	20.7%	50.47
Investment in buildings and structures	16.9%	62.0%	21.1%	52.11
Investment in plant and equipment	20.8%	61.4%	17.8%	48.51
Investment in eCommerce	22.1%	60.8%	17.1%	47.51

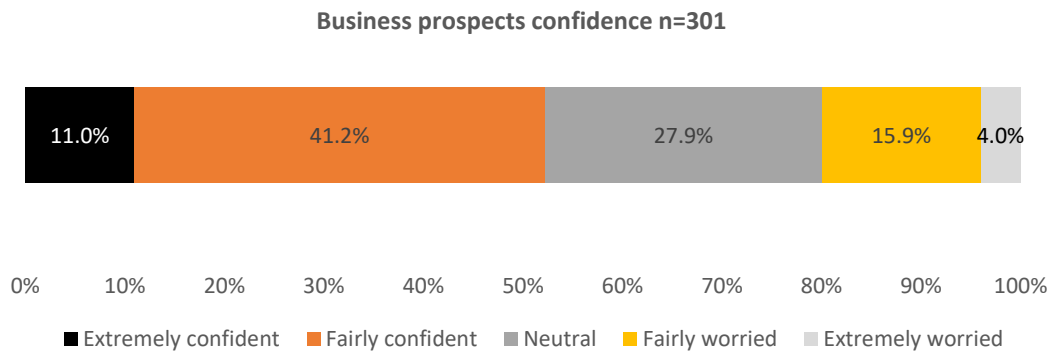
**Q13. How do you expect the same business KPIs to perform in Q4 of 2019? Will they be up, down or about the same as the previous quarter?**



The final quarter of 2019 is predicted to see improvements in general business conditions, total sales/revenue, profitability and overtime worked. Average wages, export sales, non-wage labour costs, selling prices and number of employees are all expected to remain the same. Investment in buildings and structures, investment in plant and equipment and investment in eCommerce are all expected to be down.

	Up	Same	Down	Local Index Q4 2019
General business conditions	29.1%	51.3%	19.6%	45.28
Total sales/revenue	39.8%	36.4%	23.8%	42.01
Average wages	25.5%	62.4%	12.2%	43.35
Export sales	12.7%	70.3%	16.9%	52.12
Non-wage labour costs	33.2%	58%	8.8%	37.82
Selling prices	18.4%	70.4%	11.2%	46.40
Profitability	28.8%	42.8%	28.4%	49.81
Number of employees	14.2%	74.2%	11.5%	48.65
Overtime worked	22.3%	62.8%	14.9%	46.28
Investment in buildings and structures	12%	73.7%	14.4%	51.20
Investment in plant and equipment	16.8%	66.3%	16.8%	50.00
Investment in eCommerce	17.2%	69%	13.8%	48.28

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



Over half of the businesses surveyed indicate some level confidence with just over a quarter being neutral and two in ten feeling worried. This is an improvement on 2017 where more people were worried and less were neutral. Roughly the same are confident this year compared to 2017.

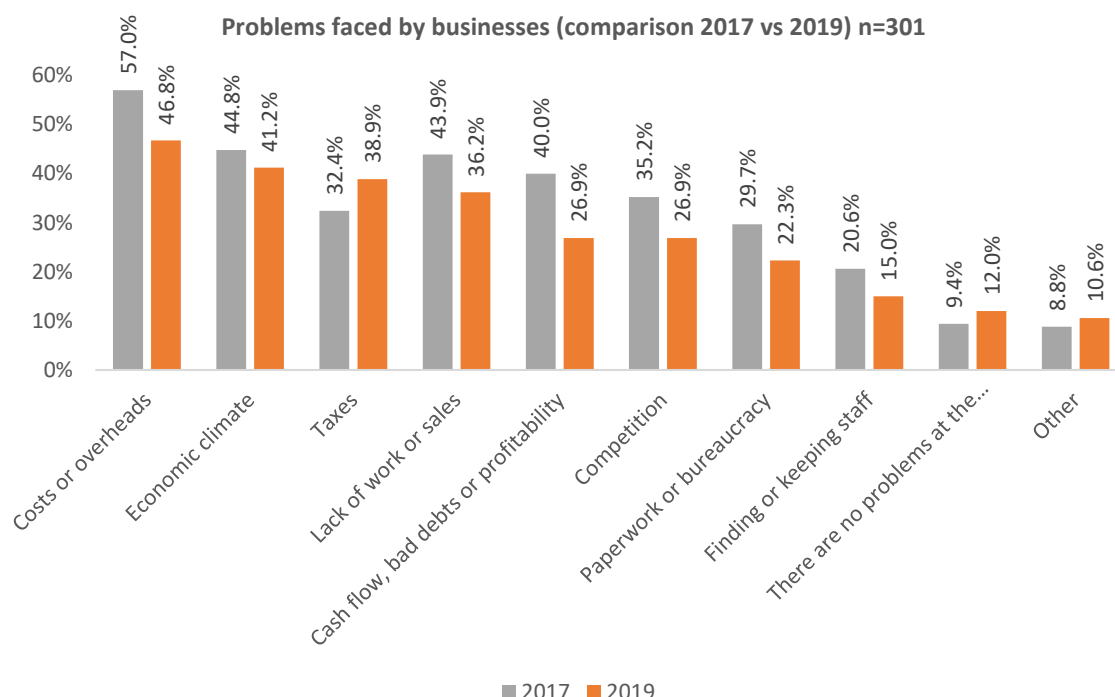
Confidence level	Local Council Area	South Australia	National
Confident	52.2%	55%	56%
Worried	19.9%	21%	20%
Net balance	+32.3	+34	+36

The local Council area is very similar in confidence results as recorded in the September quarter National Sensis Business Index and has improved on the 2017 results that showed a greater percentage of businesses worried (23.9% compared to 19.9% this year).

Those more likely to be confident are Somerton Park businesses, medium sized businesses, those turning over \$500,000-\$1 million and \$2-\$5 million, and those offering Education & Training, Electricity, Gas, Water & Waste Services, Health Care & Social Assistance, Professional, Scientific & Technical Services, Rental, Hiring & Real Estate Services and Other Services.

Those more likely to be worried are Glenelg businesses, those who have operated for 6-20 years, those turning over less than \$500,000 and those offering Arts & Recreation Services, Financial & Insurance Services, Manufacturing, and Retail Trade.

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



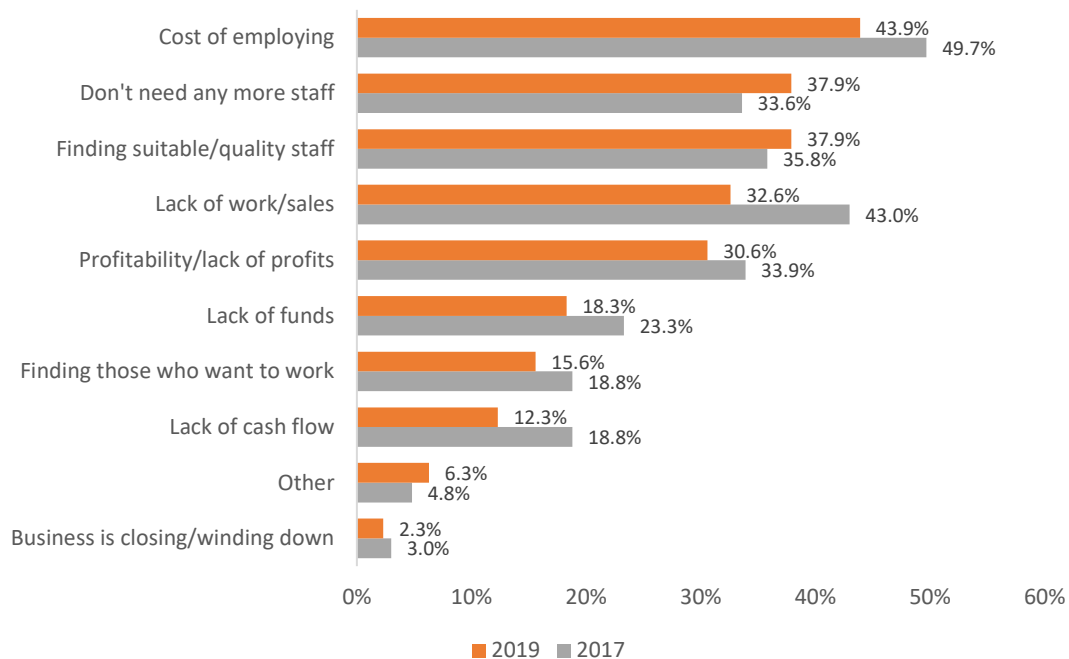
Interestingly all business issues have declined this year compared to 2017 except for taxes however the order of issues has remained the same. The small number of others (32 comments) comprised:

- Changes in legislation making it harder to be profitable
- Council rates too high
- Don't know/not sure (5 responses)
- Drug addicts and trouble in area
- Foot traffic, getting people down to Jetty Rd
- Hard to get funding due to the royal commission in banking so can't grow and move the business forward
- Holdfast Council providing no and/or actively preventing trading opportunities in Holdfast Bay council area
- Increased rent
- Intrastate opportunities
- Lack of car parking and car yard using all available car parking in the area
- Lack of foot traffic
- NBN phone line drop outs constantly
- Online sales
- Parking
- Rent (2 responses)
- Rent of Shops very high
- The uncertainty of the hove railway crossing project
- Work is seasonal



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

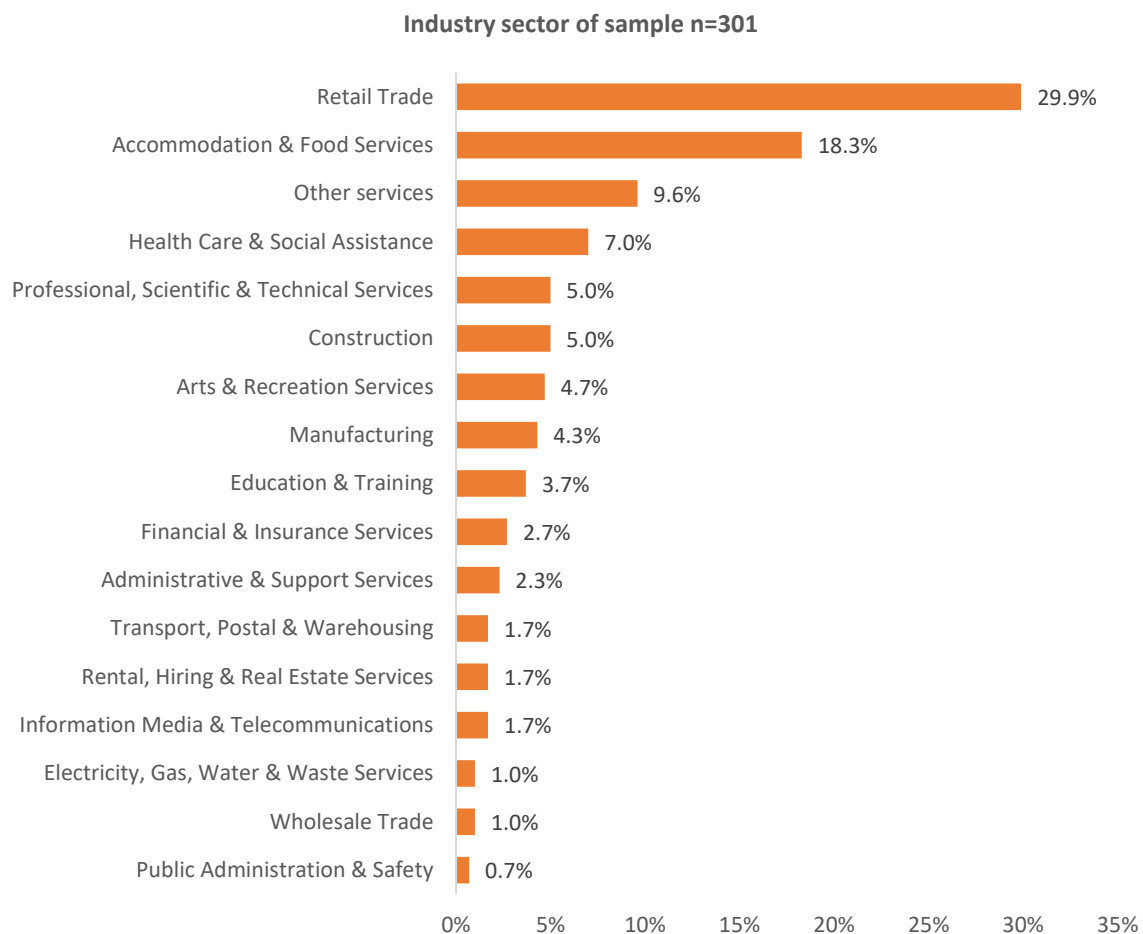
Comparison of barriers to employing new employees 2017 vs 2019 n=301



There are some very significant differences between the key barriers to taking on new employees between 2017 and 2019. This year cost of employing is a barrier followed by finding suitable/quality staff and don't need any more staff. There were a small number of other responses that comprised:

- Government audit costs
- Loans from banks to renovate business
- None/no barriers (4 responses)
- Never employed anyone
- Possible sale of business
- Rent cost too much
- Time to generate more work
- Uncertainty around new legislation over next 12 months

## Q17. What industry sector do you fall into?



The sample is similar to the previous survey in 2017 but with less businesses in the Retail Trade and Accommodation & Food Services.

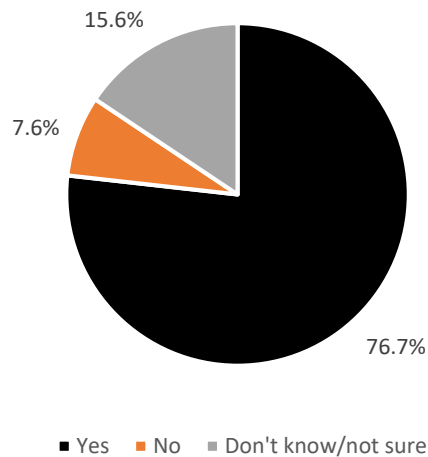
Others comprised:

- Alternative therapy
- Autonomous vehicle approvals
- Beauty Therapy (3 responses)
- Commercial cleaning
- Funeral Services
- Hair and beauty (3 responses)
- Health and Wellbeing (2 responses)
- Massage (2 responses)
- Mining (2 responses)
- Retail and Services
- Service
- Skin clinic

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

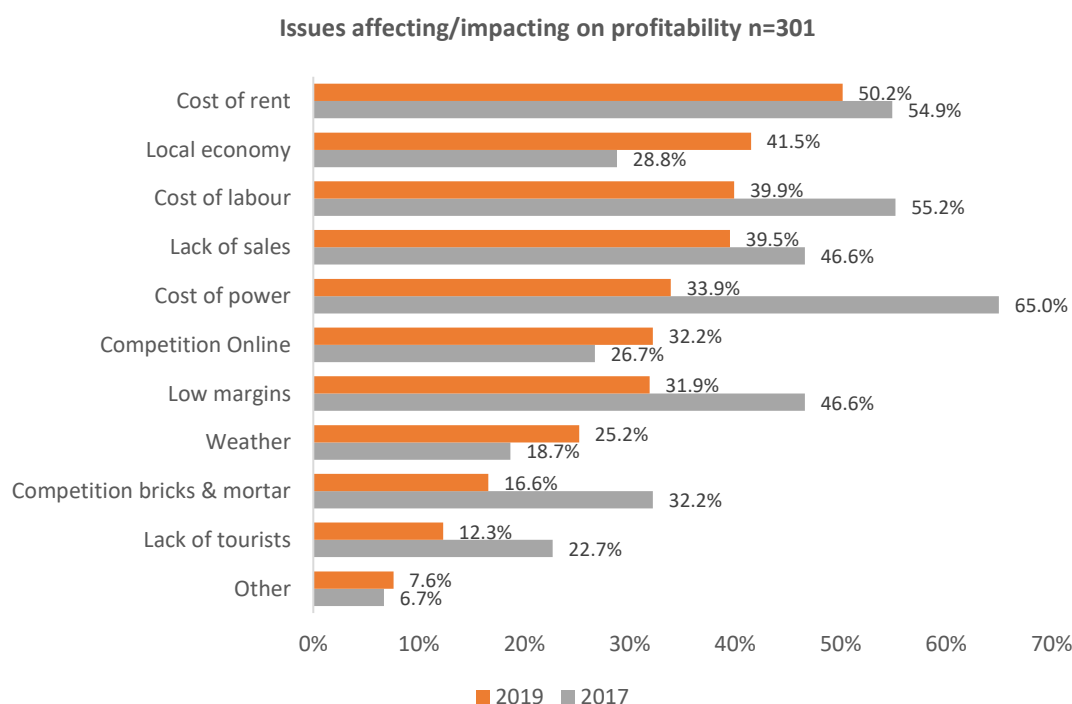
Belief that profitability is in decline in the retail sector n=301



Again this year, the majority of people believe that profitability is declining in the retail sector at the moment with 8% disagreeing and 16% who do not know or are not sure. These figures are extremely close to the results from 2017 but people this year are more likely to agree than not know obviously being affected by publicity to the affirmative.

Those more likely to agree are businesses in Hove, businesses that have operated for over 20 years, all businesses turning over \$10 million or less, and those offering Administrative & Support Services, Financial & Insurance Services, Health Care & Social Assistance, Public Administration & Safety, Retail Trade and Transport, Postal & Warehousing.

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



Cost of rent is the most common factor affecting profitability. This scene is completely different to that of 2017 where the top response affecting profitability was the cost of power followed by cost of labour and then cost of rent. The other responses comprised:

- Big stores are undercutting the smaller guys. And it doesn't help that they can now open when they want
- Council Rates
- Government costs
- Holdfast Council proving support only to Jetty Road traders at expense of other trading areas and mobile businesses operating in area
- Investment in technology/ advances in technology
- Lack of support from local government and high local government costs.
- None (6 responses)
- Parking
- Regulations
- Tax
- Don't know/not sure
- Working to retirement

Cost of rent is more likely to have affected businesses in Glenelg, those operating for 6-10 years and over 20 years, those turning over \$500,000-\$1 million and \$2-\$5 million, and those offering Accommodation & Food Services, Arts & Recreation Services, Manufacturing, Retail Trade and the Wholesale Trade.

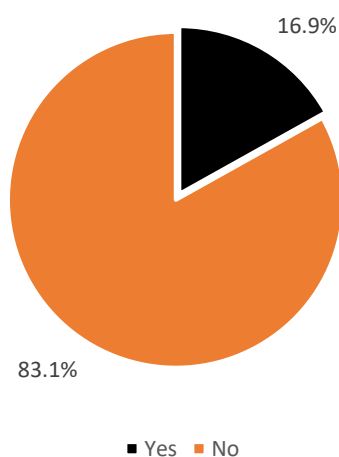
Local economy is more likely to have affected Hove businesses, those who have operated for 11 years or more, those turning over \$500,000-\$1 million, and those offering Accommodation & Food Services, Administrative & Support Services, Financial & Insurance Services, Manufacturing, Rental, Hiring & Real Estate Services and the Retail Trade.

Cost of labour is more likely to have affected those businesses that have operated for over 20 years, medium sized businesses, those turning over \$500,000-\$5 million, and those offering Accommodation & Food Services, Electricity, Gas, Water & Waste Services, Financial & Insurance Services, and Manufacturing.

Lack of sales is more likely to have affected those businesses in Somerton Park, those operating for 11-20 years, smaller turnover businesses less than \$1 million in revenue, and those offering Arts & Recreation Services, Electricity, Gas, Water & Waste Services, Retail Trade and Transport, Postal & Warehousing.

## Q20. Have you done any business with Council in the last 12 months?

Incidence of doing business with Council in last 12 months n=301



The vast majority of businesses have not done business with Council in the last 12 months. This is similar to the 2017 incidence where 19% had and 81% had not. Those more likely to have dealt with Council are Somerton Park businesses, those that have operated for 6-10 years, businesses turning over \$1-\$5 million and \$10-\$50 million, and those offering Accommodation & Food Services, Arts & Recreation Services, Construction, Manufacturing, Professional, Scientific & Technical Services and Rental, Hiring & Real Estate Services.

If businesses had dealings with Council, they were asked to specify what these dealings were:

- Advertised our services through a council initiative but no direct (sales) business with the council
- All the time
- Applications
- Applied for expansion approval
- Approached Councillors re sand groins and beach protection
- Bookings, events
- Building application

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- Building approvals (2 responses)
  - Building modifications
  - Building Project
  - Collaborate on arts/community projects
  - Complaints
  - Customer
  - Development approval
  - Drafted documentation to seek approval of South Esplanade trial of automated shuttle.
  - Engaged with the council on liquor license and premises
  - Engineering design services
  - Event stalls
  - Events
  - Front shop grant
  - General printing and signage.
  - Grant applications
  - Involved with business awards & newsletter
  - Jetty Road street party
  - Jetty Road Traders
  - Licenses and Permits
  - Local mag? Someone came in to take a picture. I didn't see it anyway
  - Outdoor tables
  - Paid council rates on behalf of landlords
  - Paid licenses
  - Permits
  - Planning and developing
  - Planning Development Applications
  - Plans for shed to be built
  - Product days
  - Programmed Musicians, Addressed at PD Workshops, Contributed to Arts & Culture Strategic Plan
  - Rates, Library, Bus
  - Redeveloping property
  - Repairs
  - Shopfront Grants
  - Sit on committees - street parties
  - Small business grant and interaction with arts planning staff
  - Street party
  - Street party & rates
  - Use of facilities and cemetery's
  - Waste audits
  - We lodge Development Applications with Council regularly.
  - We print for the council regularly
  - We were given a fine, with no real solution to rectify the problem.

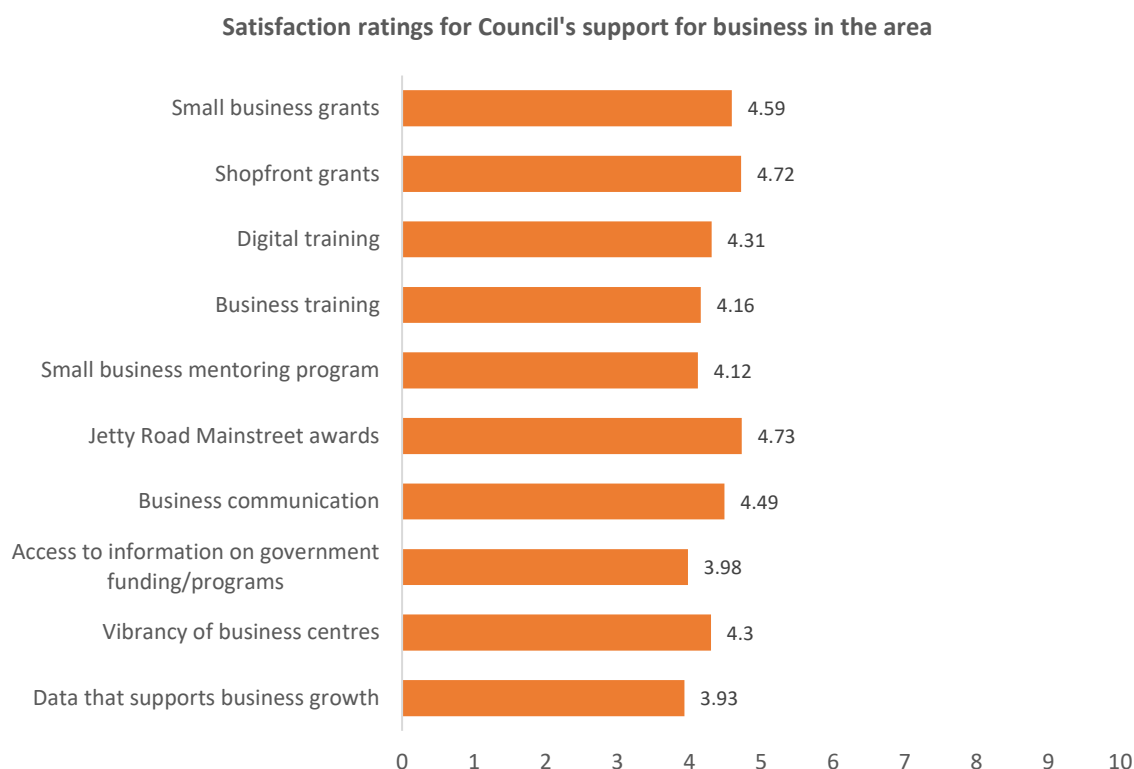
- Wish we could, but council events section and/or powerful Jetty Road traders lobby have prevented this

**Q21. 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?**



The ratings ranged from a low 4.28 to 6.05 – poor to average.

**Q22. 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?**



These are disappointing scores for Council's support for business in the area with all scores being poor. We suspect that the the scores reflect a low level of awareness.

**Q23. Do you have any suggestions or ideas on what strategies the City of Holdfast Bay can implement to support better business conditions for you?**

185 respondents chose not to provide a response to this open ended question but 116 people chose to respond. The common themes amongst these comments is the perennial parking problems, Jetty Road Glenelg looking tired and dull, better communication with business of grants and other assistance, Council needs to do more to attract business to the area, generally offer more support for business and some safety concerns in and around Glenelg. The verbatim comments are as follows:

- A need to understand how many varied operators they have in the area
- Accountability by landlords to maintain their buildings and a rated structure for what they can charge per square metre. Take a real interest in the mix of businesses in the area, not just fill the shops for the sake of it. How many coffee shops do we need yet you can't even buy a pair of bathers on Jetty Road a beach suburb for goodness sake!
- Advertising, attract tourist, allow longer hour for parking, more activities in the middle part of Jetty Road
- Advertising the Jetty Road - shopping area.
- Advising businesses of grants and other information
- Allow larger business signage
- Assist in disability holistically and the NDIS



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- Attract people to hold fast shores
  - Better parking opportunities for business
  - Can I put the business sign along the road?
  - Car parking needs more advertising for interstate visitors. Clean up of Brighton Rd end.
  - Care with parking restrictions which do not allow staff and visitors to park near businesses
  - Clean the street up. Get better canopies on restaurants in Moseley Square. Present the area little more stylishly as it is the beach area of Adelaide especially for the tourists
  - Closing off Jetty Rd to traffic from Byron Street, still maintain the trams and this allows a safer shopping precinct.
  - Communication with business and get some suggestions
  - Continued support of local businesses.
  - Council fee to wave off for displaying goods on street
  - Decrease the 1hr parking on Broadway our clients stay 2 hours sometimes having multiple services parking is a worry for them. Broadway in general is a lot busier now but it's not increasing sales for us. Help from council getting people visiting Broadway spending in the shops not just congesting the area parking to walk their dogs and get coffees.
  - Decrease the rent so that we can decrease the price of items and sales can be increased.
  - Do away with the main street board
  - Do not make it a mall. Jetty Road needs a clean and freshen up.
  - Ease of parking over peak trading periods - e.g. staff parking permits for parking on side streets
  - Ease the pressure on business taxes, fees, rates.
  - Encourage more people to the area to be spending money locally
  - Encouragement of small businesses, opportunities to showcase unique businesses locally
  - Events, promotions
  - Focus on developing Moseley Square more (beach area) instead of just Jetty Rd (Main Street)
  - Free on street parking
  - Free parking 24/7 in the Brighton area to allow more foot traffic
  - Free parking permits for business owners / managers
  - Free parking would be great all day.
  - Glenelg and Jetty Road is looking very tired and run down, lots of business have popped up and gone with 1-2 years. Unfortunately when most of the main strip is owned by a couple of millionaires is not great for small businesses
  - Go out and speak to shop owners and understand the need they all have in order to increase business profitability. Remove Centrelink money from youngsters as they don't want to work as there's no incentives for it.
  - Greater engagement, initiatives and communication with businesses
  - Help small business out not only big names
  - I cannot think of any suggestions. All seems to be working ok.
  - I function as an independent serving both private and Government sectors.
  - I know it's a hard task and I constantly see council workers on the job throughout the Jetty Road precinct but there is an issue with the general cleanliness of our Main Street community and the surrounds. I do see this as an issue and one that becomes more prominent during the summer season as there are more tourists whether interstate or from other suburbs. Glenelg used to be a place of pride and almost a boutique destination for want of a better word, however I do see the

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cosmetic value decline and many of my patrons confide they do not always feel safe on Jetty Road especially at nights and particularly in our peak season.

- If tram ran around to Anzac Highway and back on to Brighton Road it would service Glenelg residents to get around free up Moseley Square for people to dine in quieter space and there would be transport for the oldies to get to the shops big infrastructure change but would work better I think.
- Implement programs over winter to increase visitors to the area
- Improved internet speed
- Incentivise small business, to build community and culture. Limit red tape for new and proactive business models. Work together with small business to achieve council's goals.
- Include real estate in awards for Jetty Road awards
- Include the top end of the street in your vision
- Jetty Road needs a revamp to attract tourists and more importantly locals to the area for everyday shopping needs. It looks very tired. The streetscape is coming along but the general trading conditions has meant that the shopfronts are largely tatty. Parking is the perennial problem.
- Jetty Road needs to be revamped and uplifted as it is falling behind Henley Beach, Jetty Road Brighton, Harbour Town etc. Landlords need to be more accountable and not just take the rent and look at the mix of businesses in the area.
- Keep an eye on parking limits in our vicinity
- Less cost for GST
- Less hurdles and red tape when applying to upgrade or renovate your business property/buildings, funding or grants for small business so there are other avenues besides banks to grow your business
- Let all business owners know when local events are happening e.g. Fun runs, car shows
- Make information more easily available for small business and advertise where small business can find information on grants, loans, and support.
- Make Landlords responsible for maintaining their premises.
- Marketing
- Meet us
- More advertising better internet sources
- More advertising on Jetty Road Moseley Square for Marina as I find many people still have no idea we are here
- More communication on how you support local businesses. We have never heard about the shop front grants or business mentoring and would like to know more.
- More events
- More events throughout winter trade
- More events to attract people coming from other places.
- More focus on all of Glenelg not just Moseley Square
- More free parking.
- More grants
- More parking, better relationships with business along Jetty Road.
- More police patrol - lots of squatters/intoxicated people that have entered the store becoming a safety issue or hung near our back door leaving drugs/faeces
- More police presence

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- More small business grants and funding opportunities
  - More support via social media and connecting with younger businesses and business people to help them thrive and grow and keep them running in the early days
  - More transparency with business owners
  - Move centre link to remote location off Jetty Rd to much disturbance
  - Need more bins. Need to clean graffiti.
  - Need to bring more attractions on Jetty Road Glenelg. Businesses are struggling a lot on here, council needs to help and support to bringing more people on Glenelg.
  - Needs a good clean up and the Xmas decorations are really poor
  - No I think in general the Holdfast Bay is the best council we work with in comparison to our other locations
  - No. Continue more of the same. Target marketing that doesn't reflect seasonal changes - encouraging more stability of services at the bay
  - Not reduce amount of car parking along Jetty Road. Clean up the pavers along Jetty Road more often. Enhance Jetty Road with more accent lighting. Jetty Road is the HUB of Glenelg and it needs TLC at the moment and is grotty and dull.
  - Nothing that would affect our business directly but parking is an ongoing issue down the bay, I sometimes go elsewhere for certain shopping items as I know parking it too difficult at Glenelg.
  - Parking
  - Parking is a problem need longer than 2 hour limit. The street needs a good clean up. Remove the homeless and indigenous people to a more suitable area. Xmas decorations are very average. Not a classy look at all. Give it a more modern update. Advertise. Give people a reason to want to come to Glenelg again. It used to be a vibrant place to visit. Not any more
  - Parking spaces gradually disappear when we need more e.g. Colley Terrace, Durham Street
  - People begging for money
  - People find parking a problem. Need more to get more visitors.
  - Planning and development of Child Care Centres are saturating the area with those centres already in existence not full. No need for these buildings to be going up. Discounted Council Rates for Not-For-Profit Services.
  - Please less of the same shops cafe hairdresser etc.
  - Please think of clothing retail more not just beach and restaurants. And the fact that Jetty Rd goes past Moseley Street.
  - Promote other streets not only Jetty Road
  - Promoting business which create and reinforce the positive Holdfast Bay image. This creates a good place to work and a good community to have your business in. e.g. no vaping stores, XXX massage parlours etc.
  - Promotion of local business
  - Provide more free parking time slots, instead of 24 hours parking charges, to attract more people visiting to Glenelg.
  - Reach out to local businesses to discuss what opportunities are available for interaction
  - Reduce outdoor fees and increase parking for customers
  - Reduce rates, improve capital works projects, monitor & enforce regulatory noncompliance by constituents
  - Regular face to face contact with retailers

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- Remove red tape and ensure that areas are well maintained, including alleys.
  - Remove restricted time parking on Jetty Road at Brighton. If the Hove Station is closed then there will be even less parking for business customers because commuters will need the parking spaces at the Brighton Station.
  - Signage Industrial area/precinct modern clear for consumers to locate area and investigate. Tidy up on streets/businesses externals in precinct to be clean and tidy (more inviting). Parking is a huge problem in the industrial precinct for staff and customers.
  - Simplify
  - Stop focus only on Jetty Road traders and their powerful lobby influence
  - Stop giving work to large corporations and making it impossible for local business to even be given a chance to tender. In so many cases, local businesses can provide a better and cheaper solution else it would not be in business as other business would not use them.
  - Stop traders and staff parking in the street by increasing fines for replete offenders
  - Street footage. When we have had people steal from us, police are unable to do anything as there is no footage on the streets
  - Streetscape, promotion through socials
  - Support and marketing Jetty Road
  - Take away the cost of outdoor dining. It is necessary for our business to survive and our rents continue to rise.
  - They need to create more vibrancy and attract different retailers. Maybe have, more of a quirky atmosphere.
  - Things are good
  - Too busy working to think about the council
  - Unified precinct
  - Upgrade overall street environment
  - Upgrade and widen the footpaths. Lighting of the street speakers in the street for a village feel. Better Xmas decorations. Create a better retail mix.
  - Use local businesses for services
  - We need support and to feel safe for ourselves , businesses staff and potential tourists and clients, GLENELG is full of trouble and no police around to get rid of them , GLENELG street also needs to be done up, street looks run down
  - We need to focus more on the week after week shoppers and not so much on the tourist market. The tourists are the cream of the crop. It's the weekly shoppers that keep us in business.
  - Willingness to invest in more autonomous vehicle trials
  - Would like more shops front grants
  - Yes, would like Council to undertake surveys that are relevant and that they can act on to better business, better the area, and the city. Council to act on the outcome of genuine feedback.

## 5. Tabulations

### Q1. In which suburb is your business located?

In which suburb is your business located?	Glenelg (including Glenelg East, Glenelg South and Glenelg North)	176 58.5%
	Somerton Park	47 15.6%
	Brighton (including Brighton North, Brighton South)	43 14.3%
	Hove	22 7.3%
	Seacliff	13 4.3%
	Total	301 100.0%

There were no businesses from Kingston Park.

### Q2. How long has your business operated in the City of Holdfast Bay Council area?

Number of whole years	11.80
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Statistics		
Number of whole years		
N	Valid	301
	Missing	0
Mean		11.7957
Median		7.0000
Mode		1.00

Number of whole years					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	.00	16	5.3	5.3	5.3
	.50	1	.3	.3	5.6
	1.00	37	12.3	12.3	17.9
	2.00	33	11.0	11.0	28.9
	3.00	19	6.3	6.3	35.2
	4.00	18	6.0	6.0	41.2
	5.00	20	6.6	6.6	47.8
	6.00	6	2.0	2.0	49.8
	7.00	10	3.3	3.3	53.2
	8.00	10	3.3	3.3	56.5
	9.00	13	4.3	4.3	60.8
	10.00	22	7.3	7.3	68.1
	11.00	5	1.7	1.7	69.8
	12.00	4	1.3	1.3	71.1
	13.00	3	1.0	1.0	72.1
	14.00	5	1.7	1.7	73.8
	15.00	10	3.3	3.3	77.1
	16.00	1	.3	.3	77.4
	18.00	1	.3	.3	77.7
	19.00	5	1.7	1.7	79.4

Number of whole years				
	Frequency	Percent	Valid Percent	Cumulative Percent
20.00	17	5.6	5.6	85.0
22.00	2	.7	.7	85.7
23.00	3	1.0	1.0	86.7
24.00	2	.7	.7	87.4
25.00	5	1.7	1.7	89.0
26.00	1	.3	.3	89.4
28.00	1	.3	.3	89.7
29.00	1	.3	.3	90.0
30.00	4	1.3	1.3	91.4
32.00	1	.3	.3	91.7
34.00	2	.7	.7	92.4
35.00	4	1.3	1.3	93.7
36.00	1	.3	.3	94.0
39.00	1	.3	.3	94.4
40.00	4	1.3	1.3	95.7
41.00	1	.3	.3	96.0
42.00	1	.3	.3	96.3
43.00	1	.3	.3	96.7
50.00	1	.3	.3	97.0
60.00	3	1.0	1.0	98.0
68.00	1	.3	.3	98.3
70.00	1	.3	.3	98.7
82.00	1	.3	.3	99.0
84.00	1	.3	.3	99.3
90.00	1	.3	.3	99.7
150.00	1	.3	.3	100.0
Total	301	100.0	100.0	

In which suburb is your business located?							
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Number of years	0-5 years	85 48.3%	16 34.0%	24 55.8%	13 59.1%	6 46.2%	144 47.8%
	6-10 years	38 21.6%	9 19.1%	7 16.3%	2 9.1%	5 38.5%	61 20.3%
	11-20 years	31 17.6%	11 23.4%	5 11.6%	3 13.6%	1 7.7%	51 16.9%
	Over 20 years	22 12.5%	11 23.4%	7 16.3%	4 18.2%	1 7.7%	45 15.0%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		Size of business		
		Small <20 employees	Medium 20-199 employees	Total
Number of years	0-5 years	136	8	144
		48.6%	38.1%	47.8%
	6-10 years	61	0	61
		21.8%	.0%	20.3%
	11-20 years	47	4	51
		16.8%	19.0%	16.9%
	Over 20 years	36	9	45
		12.9%	42.9%	15.0%
Total		280	21	301
		100.0%	100.0%	100.0%

		Number of years				
		0-5 years	6-10 years	11-20 years	Over 20 years	Total
What industry sector do you fall into?	Accommodation & Food Services	29	11	10	5	55
		52.7%	20.0%	18.2%	9.1%	100.0%
	Administrative & Support Services	1	3	2	1	7
		14.3%	42.9%	28.6%	14.3%	100.0%
	Arts & Recreation Services	12	1	0	1	14
		85.7%	7.1%	.0%	7.1%	100.0%
	Construction	8	3	2	2	15
		53.3%	20.0%	13.3%	13.3%	100.0%
	Education & Training	6	2	0	3	11
		54.5%	18.2%	.0%	27.3%	100.0%
	Electricity, Gas, Water & Waste Services	2	1	0	0	3
		66.7%	33.3%	.0%	.0%	100.0%
	Financial & Insurance Services	5	1	1	1	8
		62.5%	12.5%	12.5%	12.5%	100.0%
	Health Care & Social Assistance	11	1	5	4	21
		52.4%	4.8%	23.8%	19.0%	100.0%
	Information Media & Telecommunications	2	0	2	1	5
		40.0%	.0%	40.0%	20.0%	100.0%
	Manufacturing	5	1	5	2	13
		38.5%	7.7%	38.5%	15.4%	100.0%
	Professional, Scientific & Technical Services	6	5	3	1	15
		40.0%	33.3%	20.0%	6.7%	100.0%
	Public Administration & Safety	2	0	0	0	2
		100.0%	.0%	.0%	.0%	100.0%
	Rental, Hiring & Real Estate Services	1	2	0	2	5
		20.0%	40.0%	.0%	40.0%	100.0%
	Retail Trade	32	23	15	20	90
		35.6%	25.6%	16.7%	22.2%	100.0%
	Transport, Postal & Warehousing	4	0	1	0	5
		80.0%	.0%	20.0%	.0%	100.0%
	Wholesale Trade	1	2	0	0	3
		33.3%	66.7%	.0%	.0%	100.0%
	Other Services (please specify)	17	5	5	2	29
		58.6%	17.2%	17.2%	6.9%	100.0%
Total		144	61	51	45	301
		47.8%	20.3%	16.9%	15.0%	100.0%

**Q3. How many people (including management and owners) did your business employ in the current quarter (September 2019)?**

How many people (including management and owners) did your business employ in the current quarter (September, 2019)?	1	<b>84</b>
		<b>27.9%</b>
	2-19	<b>196</b>
		<b>65.1%</b>
	20-49	<b>20</b>
		<b>6.6%</b>
	50-99	<b>1</b>
		<b>.3%</b>
	Total	<b>301</b>
		<b>100.0%</b>

All businesses fell into the small to medium sized business categories with employees numbering less than 100.

Size of business	Small <20 employees	<b>280</b>
		<b>93.0%</b>
	Medium 20-199 employees	<b>21</b>
		<b>7.0%</b>
	Total	<b>301</b>
		<b>100.0%</b>

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Size of business	Small <20 employees	<b>161</b>	<b>44</b>	<b>42</b>	<b>20</b>	<b>13</b>	<b>280</b>
		<b>91.5%</b>	<b>93.6%</b>	<b>97.7%</b>	<b>90.9%</b>	<b>100.0%</b>	<b>93.0%</b>
	Medium 20-199 employees	<b>15</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>21</b>
		<b>8.5%</b>	<b>6.4%</b>	<b>2.3%</b>	<b>9.1%</b>	<b>.0%</b>	<b>7.0%</b>
	Total	<b>176</b>	<b>47</b>	<b>43</b>	<b>22</b>	<b>13</b>	<b>301</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>



		Size of business		
		Small <20 employees	Medium 20-199 employees	Total
What industry sector do you fall into?	Accommodation & Food Services	49 89.1%	6 10.9%	55 100.0%
	Administrative & Support Services	7 100.0%	0 .0%	7 100.0%
	Arts & Recreation Services	13 92.9%	1 7.1%	14 100.0%
	Construction	15 100.0%	0 .0%	15 100.0%
	Education & Training	8 72.7%	3 27.3%	11 100.0%
	Electricity, Gas, Water & Waste Services	3 100.0%	0 .0%	3 100.0%
	Financial & Insurance Services	7 87.5%	1 12.5%	8 100.0%
	Health Care & Social Assistance	21 100.0%	0 .0%	21 100.0%
	Information Media & Telecommunications	5 100.0%	0 .0%	5 100.0%
	Manufacturing	12 92.3%	1 7.7%	13 100.0%
	Professional, Scientific & Technical Services	13 86.7%	2 13.3%	15 100.0%
	Public Administration & Safety	2 100.0%	0 .0%	2 100.0%
	Rental, Hiring & Real Estate Services	4 80.0%	1 20.0%	5 100.0%
	Retail Trade	84 93.3%	6 6.7%	90 100.0%
	Transport, Postal & Warehousing	5 100.0%	0 .0%	5 100.0%
	Wholesale Trade	3 100.0%	0 .0%	3 100.0%
	Other Services (please specify)	29 100.0%	0 .0%	29 100.0%
	Total	280 93.0%	21 7.0%	301 100.0%

#### Q4. What is your annual turnover range?

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
What is your annual turnover range?	<\$500k	65 36.9%	20 42.6%	24 55.8%	16 72.7%	10 76.9%	135 44.9%
	\$500k-\$1 million	37 21.0%	11 23.4%	4 9.3%	2 9.1%	0 .0%	54 17.9%
	\$1 million - \$2 million	14 8.0%	7 14.9%	2 4.7%	3 13.6%	0 .0%	26 8.6%
	\$2 million-\$5 million	12 6.8%	3 6.4%	3 7.0%	0 .0%	0 .0%	18 6.0%
	\$5 million-\$10 million	1 .6%	1 2.1%	0 .0%	0 .0%	0 .0%	2 .7%
	\$10 million-\$50 million	3 1.7%	0 .0%	0 .0%	0 .0%	0 .0%	3 1.0%
	Prefer not to say	44 25.0%	5 10.6%	10 23.3%	1 4.5%	3 23.1%	63 20.9%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		Size of business		
		Small <20 employees	Medium 20-199 employees	Total
What is your annual turnover range?	<\$500k	135 48.2%	0 .0%	135 44.9%
	\$500k-\$1 million	51 18.2%	3 14.3%	54 17.9%
	\$1 million - \$2 million	20 7.1%	6 28.6%	26 8.6%
	\$2 million-\$5 million	12 4.3%	6 28.6%	18 6.0%
	\$5 million-\$10 million	0 .0%	2 9.5%	2 .7%
	\$10 million-\$50 million	2 .7%	1 4.8%	3 1.0%
	Prefer not to say	60 21.4%	3 14.3%	63 20.9%
	Total	280 100.0%	21 100.0%	301 100.0%

		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		
What industry sector do you fall into?	Accommodation & Food Services	18 32.7%	12 21.8%	3 5.5%	2 3.6%	0 .0%	0 .0%	20 36.4%	55 100.0%
	Administrative & Support Services	4 57.1%	1 14.3%	0 .0%	0 .0%	0 .0%	0 .0%	2 28.6%	7 100.0%
	Arts & Recreation Services	10 71.4%	1 7.1%	1 7.1%	1 7.1%	0 .0%	0 .0%	1 7.1%	14 100.0%
	Construction	5 33.3%	1 6.7%	3 20.0%	2 13.3%	0 .0%	1 6.7%	3 20.0%	15 100.0%
	Education & Training	5 45.5%	0 .0%	4 36.4%	0 .0%	0 .0%	0 .0%	2 18.2%	11 100.0%
	Electricity, Gas, Water & Waste Services	3 100.0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	3 100.0%
	Financial & Insurance Services	3 37.5%	3 37.5%	1 12.5%	0 .0%	1 12.5%	0 .0%	0 .0%	8 100.0%
	Health Care & Social Assistance	10 47.6%	7 33.3%	1 4.8%	1 4.8%	0 .0%	0 .0%	2 9.5%	21 100.0%
	Information Media & Telecommunications	4 80.0%	0 .0%	1 20.0%	0 .0%	0 .0%	0 .0%	0 .0%	5 100.0%
	Manufacturing	9 69.2%	1 7.7%	2 15.4%	0 .0%	0 .0%	0 .0%	1 7.7%	13 100.0%
	Professional, Scientific & Technical Services	10 66.7%	2 13.3%	1 6.7%	1 6.7%	1 6.7%	0 .0%	0 .0%	15 100.0%
	Public Administration & Safety	2 100.0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	2 100.0%
	Rental, Hiring & Real Estate Services	0 .0%	0 .0%	0 .0%	1 20.0%	0 .0%	1 20.0%	3 60.0%	5 100.0%
	Retail Trade	28 31.1%	22 24.4%	9 10.0%	9 10.0%	0 .0%	1 1.1%	21 23.3%	90 100.0%
	Transport, Postal & Warehousing	4 80.0%	1 20.0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	5 100.0%
	Wholesale Trade	2 66.7%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	1 33.3%	3 100.0%
	Other Services (please specify)	18 62.1%	3 10.3%	0 .0%	1 3.4%	0 .0%	0 .0%	7 24.1%	29 100.0%
	Total	135 44.9%	54 17.9%	26 8.6%	18 6.0%	2 .7%	3 1.0%	63 20.9%	301 100.0%

## Q5. What ratio of each of the following do you employ on a full time basis to the nearest 10 percent?

### Gender

As ratios are used to make comparisons between two things and non-binary was added to this question as a third option a true ratio cannot be established with the inclusion of non-binary. Therefore those nominating that they do not align to either gender will be removed from further ratio calculations in this instance.

Male - Ratio	<b>5.06</b>
Female - Ratio	<b>5.99</b>
Non-binary - Ratio	<b>1.16</b>

	0	10	20	30	40	50	60	70	80	90	100	Total
Male - Ratio	82	22	18	23	9	67	6	10	7	7	50	301
	27.2%	7.3%	6.0%	7.6%	3.0%	22.3%	2.0%	3.3%	2.3%	2.3%	16.6%	100.0%
Female - Ratio	75	6	7	16	12	67	6	16	17	22	57	301
	24.9%	2.0%	2.3%	5.3%	4.0%	22.3%	2.0%	5.3%	5.6%	7.3%	18.9%	100.0%
Non-binary - Ratio	285	2	4	8	1	0	0	0	0	0	1	301
	94.7%	.7%	1.3%	2.7%	.3%	.0%	.0%	.0%	.0%	.0%	.3%	100.0%

### Skilled/Unskilled Workforce

Skilled - Ratio	7.91
Unskilled - Ratio	3.16

	0	10	20	30	40	50	60	70	80	90	100	Total
Skilled - Ratio	39	10	11	6	4	39	3	16	11	19	143	301
	13.0%	3.3%	3.7%	2.0%	1.3%	13.0%	1.0%	5.3%	3.7%	6.3%	47.5%	100.0%
Unskilled - Ratio	171	19	11	16	3	39	4	6	11	10	11	301
	56.8%	6.3%	3.7%	5.3%	1.0%	13.0%	1.3%	2.0%	3.7%	3.3%	3.7%	100.0%

### Full time/Part time employees

Full time employees - Ratio	5.90
Part time employees - Ratio	5.04

	0	10	20	30	40	50	60	70	80	90	100	Total
Full time employees - Ratio	78	18	17	13	7	43	13	7	11	15	79	301
	25.9%	6.0%	5.6%	4.3%	2.3%	14.3%	4.3%	2.3%	3.7%	5.0%	26.2%	100.0%
Part time employees - Ratio	111	15	11	7	13	43	7	13	17	18	46	301
	36.9%	5.0%	3.7%	2.3%	4.3%	14.3%	2.3%	4.3%	5.6%	6.0%	15.3%	100.0%

### Q6. Which of the following internet connections does your business currently use?

		In which suburb is your business located?							
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total		
Which of the following internet connections does your business currently use?	NBN	49	23	21	16	7	116		
		27.8%	48.9%	48.8%	72.7%	53.8%	38.5%		
	5G	24	5	4	0	2	35		
		13.6%	10.6%	9.3%	.0%	15.4%	11.6%		
	Don't know/not sure	52	9	8	2	0	71		
		29.5%	19.1%	18.6%	9.1%	.0%	23.6%		
Other (please specify)		51	10	10	4	4	79		
		29.0%	21.3%	23.3%	18.2%	30.8%	26.2%		
Total		176	47	43	22	13	301		
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		

		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
Which of the following internet connections does your business currently use?	NBN	56	26	16	18	116	107	9	116
		38.9%	42.6%	31.4%	40.0%	38.5%	38.2%	42.9%	38.5%
	5G	16	4	6	9	35	30	5	35
		11.1%	6.6%	11.8%	20.0%	11.6%	10.7%	23.8%	11.6%
	Don't know/not sure	33	16	16	6	71	70	1	71
		22.9%	26.2%	31.4%	13.3%	23.6%	25.0%	4.8%	23.6%
	Other (please specify)	39	15	13	12	79	73	6	79
		27.1%	24.6%	25.5%	26.7%	26.2%	26.1%	28.6%	26.2%
Total		144	61	51	45	301	280	21	301
		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
Which of the following internet connections does your business currently use?	NBN	62	15	11	7	1	1	0	19
		45.9%	27.8%	42.3%	38.9%	50.0%	33.3%	.0%	30.2%
	5G	13	7	2	3	1	0	0	9
		9.6%	13.0%	7.7%	16.7%	50.0%	.0%	.0%	14.3%
	Don't know/not sure	22	17	6	3	0	1	0	22
		16.3%	31.5%	23.1%	16.7%	.0%	33.3%	.0%	34.9%
	Other (please specify)	38	15	7	5	0	1	0	13
		28.1%	27.8%	26.9%	27.8%	.0%	33.3%	.0%	20.6%
Total		135	54	26	18	2	3	0	63
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%

		Which of the following internet connections does your business currently use?				
		NBN	5G	Don't know/not sure	Other (please specify)	Total
What industry sector do you fall into?	Accommodation & Food Services	15 27.3%	6 10.9%	19 34.5%	15 27.3%	55 100.0%
	Administrative & Support Services	2 28.6%	0 .0%	1 14.3%	4 57.1%	7 100.0%
	Arts & Recreation Services	4 28.6%	5 35.7%	1 7.1%	4 28.6%	14 100.0%
	Construction	8 53.3%	3 20.0%	2 13.3%	2 13.3%	15 100.0%
	Education & Training	8 72.7%	0 .0%	1 9.1%	2 18.2%	11 100.0%
	Electricity, Gas, Water & Waste Services	1 33.3%	0 .0%	1 33.3%	1 33.3%	3 100.0%
	Financial & Insurance Services	5 62.5%	1 12.5%	0 .0%	2 25.0%	8 100.0%
	Health Care & Social Assistance	11 52.4%	0 .0%	4 19.0%	6 28.6%	21 100.0%
	Information Media & Telecommunications	2 40.0%	0 .0%	0 .0%	3 60.0%	5 100.0%
	Manufacturing	6 46.2%	1 7.7%	3 23.1%	3 23.1%	13 100.0%
	Professional, Scientific & Technical Services	9 60.0%	0 .0%	1 6.7%	5 33.3%	15 100.0%
	Public Administration & Safety	2 100.0%	0 .0%	0 .0%	0 .0%	2 100.0%
	Rental, Hiring & Real Estate Services	0 .0%	0 .0%	3 60.0%	2 40.0%	5 100.0%
	Retail Trade	28 31.1%	11 12.2%	29 32.2%	22 24.4%	90 100.0%
	Transport, Postal & Warehousing	3 60.0%	1 20.0%	1 20.0%	0 .0%	5 100.0%
	Wholesale Trade	1 33.3%	1 33.3%	0 .0%	1 33.3%	3 100.0%
	Other Services (please specify)	11 37.9%	6 20.7%	5 17.2%	7 24.1%	29 100.0%
	Total	116 38.5%	35 11.6%	71 23.6%	79 26.2%	301 100.0%

**Q7. On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with the speed of your internet connection?**

How satisfied are you with the speed of your internet connection? **5.54**

		How satisfied are you with the speed of your internet connection?
Which of the following internet connections does your business currently use?	NBN	<b>6.09</b>
	5G	<b>5.29</b>
	Don't know/not sure	<b>5.69</b>
	Other (please specify)	<b>4.71</b>

		How satisfied are you with the speed of your internet connection?
In which suburb is your business located?	Glenelg (including Glenelg East, Glenelg South and Glenelg North)	<b>5.39</b>
	Somerton Park	<b>5.38</b>
	Brighton (including Brighton North, Brighton South)	<b>6.02</b>
	Hove	<b>6.95</b>
	Seacliff	<b>4.15</b>
Number of years	0-5 years	<b>5.53</b>
	6-10 years	<b>5.36</b>
	11-20 years	<b>5.61</b>
	Over 20 years	<b>5.76</b>
Size of business	Small <20 employees	<b>5.59</b>
	Medium 20-199 employees	<b>4.90</b>
What is your annual turnover range?	<\$500k	<b>5.54</b>
	\$500k-\$1 million	<b>5.81</b>
	\$1 million - \$2 million	<b>5.42</b>
	\$2 million-\$5 million	<b>4.06</b>
	\$5 million-\$10 million	<b>9.00</b>
	\$10 million-\$50 million	<b>5.00</b>
	\$50 million+	<b>.</b>
	Prefer not to say	<b>5.70</b>
What industry sector do you fall into?	Accommodation & Food Services	<b>5.58</b>
	Administrative & Support Services	<b>7.14</b>
	Arts & Recreation Services	<b>5.00</b>
	Construction	<b>4.20</b>
	Education & Training	<b>6.91</b>
	Electricity, Gas, Water & Waste Services	<b>7.67</b>
	Financial & Insurance Services	<b>6.13</b>
	Health Care & Social Assistance	<b>5.33</b>
	Information Media & Telecommunications	<b>7.40</b>
	Manufacturing	<b>3.77</b>
	Professional, Scientific & Technical Services	<b>5.20</b>
	Public Administration & Safety	<b>4.00</b>
	Rental, Hiring & Real Estate Services	<b>6.40</b>
	Retail Trade	<b>5.49</b>
	Transport, Postal & Warehousing	<b>6.20</b>
	Wholesale Trade	<b>4.33</b>
	Other Services (please specify)	<b>6.07</b>

## Q8. Does your business transact online?

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Does your business transact online?	Yes	133 75.6%	36 76.6%	33 76.7%	14 63.6%	10 76.9%	226 75.1%
	No	32 18.2%	9 19.1%	7 16.3%	8 36.4%	3 23.1%	59 19.6%
	Don't know/not sure	11 6.3%	2 4.3%	3 7.0%	0 .0%	0 .0%	16 5.3%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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
Does your business transact online?	Yes	109 75.7%	47 77.0%	38 74.5%	32 71.1%	226 75.1%	206 73.6%	20 95.2%	226 75.1%
	No	25 17.4%	12 19.7%	11 21.6%	11 24.4%	59 19.6%	58 20.7%	1 4.8%	59 19.6%
	Don't know/not sure	10 6.9%	2 3.3%	2 3.9%	2 4.4%	16 5.3%	16 5.7%	0 .0%	16 5.3%
	Total	144 100.0%	61 100.0%	51 100.0%	45 100.0%	301 100.0%	280 100.0%	21 100.0%	301 100.0%

		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
Does your business transact online?	Yes	101 74.8%	41 75.9%	23 88.5%	14 77.8%	2 100.0%	2 66.7%	0 .0%	43 68.3%
	No	29 21.5%	11 20.4%	3 11.5%	4 22.2%	0 .0%	1 33.3%	0 .0%	11 17.5%
	Don't know/not sure	5 3.7%	2 3.7%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	9 14.3%
	Total	135 100.0%	54 100.0%	26 100.0%	18 100.0%	2 100.0%	3 100.0%	0 .0%	63 100.0%

		Does your business transact online?			
		Yes	No	Don't know/not sure	Total
What industry sector do you fall into?	Accommodation & Food Services	41 74.5%	12 21.8%	2 3.6%	55 100.0%
	Administrative & Support Services	6 85.7%	1 14.3%	0 .0%	7 100.0%
	Arts & Recreation Services	12 85.7%	2 14.3%	0 .0%	14 100.0%
	Construction	13 86.7%	2 13.3%	0 .0%	15 100.0%
	Education & Training	10 90.9%	0 .0%	1 9.1%	11 100.0%
	Electricity, Gas, Water & Waste Services	2 66.7%	1 33.3%	0 .0%	3 100.0%
	Financial & Insurance Services	8 100.0%	0 .0%	0 .0%	8 100.0%



	Does your business transact online?			
	Yes	No	Don't know/not sure	Total
Health Care & Social Assistance	12 57.1%	7 33.3%	2 9.5%	21 100.0%
Information Media & Telecommunications	4 80.0%	1 20.0%	0 .0%	5 100.0%
Manufacturing	8 61.5%	4 30.8%	1 7.7%	13 100.0%
Professional, Scientific & Technical Services	12 80.0%	3 20.0%	0 .0%	15 100.0%
Public Administration & Safety	2 100.0%	0 .0%	0 .0%	2 100.0%
Rental, Hiring & Real Estate Services	3 60.0%	1 20.0%	1 20.0%	5 100.0%
Retail Trade	68 75.6%	16 17.8%	6 6.7%	90 100.0%
Transport, Postal & Warehousing	3 60.0%	2 40.0%	0 .0%	5 100.0%
Wholesale Trade	2 66.7%	1 33.3%	0 .0%	3 100.0%
Other Services (please specify)	20 69.0%	6 20.7%	3 10.3%	29 100.0%
Total	226 75.1%	59 19.6%	16 5.3%	301 100.0%

**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.**

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	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	97 55.1%	33 70.2%	30 69.8%	12 54.5%	2 15.4%	174 57.8%
	No	53 30.1%	13 27.7%	11 25.6%	9 40.9%	10 76.9%	96 31.9%
	Don't know/not sure	26 14.8%	1 2.1%	2 4.7%	1 4.5%	1 7.7%	31 10.3%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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	85 59.0%	32 52.5%	27 52.9%	30 66.7%	174 57.8%	159 56.8%	15 71.4%	174 57.8%
	No	42 29.2%	22 36.1%	19 37.3%	13 28.9%	96 31.9%	92 32.9%	4 19.0%	96 31.9%
	Don't know/not sure	17 11.8%	7 11.5%	5 9.8%	2 4.4%	31 10.3%	29 10.4%	2 9.5%	31 10.3%
	Total	144 100.0%	61 100.0%	51 100.0%	45 100.0%	301 100.0%	280 100.0%	21 100.0%	301 100.0%

		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	78	37	17	15	2	1	0	24	174	
		57.8%	68.5%	65.4%	83.3%	100.0%	33.3%	.0%	38.1%	57.8%	
	No	46	14	6	3	0	1	0	26	96	
		34.1%	25.9%	23.1%	16.7%	.0%	33.3%	.0%	41.3%	31.9%	
	Don't know/not sure	11	3	3	0	0	1	0	13	31	
		8.1%	5.6%	11.5%	.0%	.0%	33.3%	.0%	20.6%	10.3%	
Total		135	54	26	18	2	3	0	63	301	
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	

		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	No	Don't know/not sure	Total
What industry sector do you fall into?	Accommodation & Food Services	29	18	8	55
		52.7%	32.7%	14.5%	100.0%
	Administrative & Support Services	4	3	0	7
		57.1%	42.9%	.0%	100.0%
	Arts & Recreation Services	10	3	1	14
		71.4%	21.4%	7.1%	100.0%
	Construction	8	6	1	15
		53.3%	40.0%	6.7%	100.0%
	Education & Training	5	5	1	11
		45.5%	45.5%	9.1%	100.0%
	Electricity, Gas, Water & Waste Services	2	1	0	3
		66.7%	33.3%	.0%	100.0%
	Financial & Insurance Services	6	2	0	8
		75.0%	25.0%	.0%	100.0%
	Health Care & Social Assistance	11	10	0	21
		52.4%	47.6%	.0%	100.0%
	Information Media & Telecommunications	2	3	0	5
		40.0%	60.0%	.0%	100.0%
	Manufacturing	8	4	1	13
		61.5%	30.8%	7.7%	100.0%
	Professional, Scientific & Technical Services	7	8	0	15
		46.7%	53.3%	.0%	100.0%
	Public Administration & Safety	2	0	0	2
		100.0%	.0%	.0%	100.0%
	Rental, Hiring & Real Estate Services	3	1	1	5
		60.0%	20.0%	20.0%	100.0%
	Retail Trade	57	18	15	90
		63.3%	20.0%	16.7%	100.0%
	Transport, Postal & Warehousing	3	1	1	5
		60.0%	20.0%	20.0%	100.0%
	Wholesale Trade	1	1	1	3
		33.3%	33.3%	33.3%	100.0%
	Other Services (please specify)	16	12	1	29
		55.2%	41.4%	3.4%	100.0%
Total		174	96	31	301
		57.8%	31.9%	10.3%	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?**

Intrastate	<b>6.98</b>
Interstate	<b>5.19</b>
International	<b>4.20</b>

		Intrastate	Interstate	International
In which suburb is your business located?	Glenelg (including Glenelg East, Glenelg South and Glenelg North)	<b>7.53</b>	<b>6.00</b>	<b>5.20</b>
	Somerton Park	<b>6.41</b>	<b>4.00</b>	<b>2.25</b>
	Brighton (including Brighton North, Brighton South)	<b>6.33</b>	<b>4.12</b>	<b>3.03</b>
	Hove	<b>6.24</b>	<b>3.76</b>	<b>2.67</b>
	Seacliff	<b>4.92</b>	<b>4.42</b>	<b>3.83</b>
Number of years	0-5 years	<b>6.85</b>	<b>4.81</b>	<b>3.83</b>
	6-10 years	<b>6.72</b>	<b>5.75</b>	<b>4.84</b>
	11-20 years	<b>7.32</b>	<b>5.21</b>	<b>4.20</b>
	Over 20 years	<b>7.36</b>	<b>5.61</b>	<b>4.57</b>
Size of business	Small <20 employees	<b>6.93</b>	<b>5.20</b>	<b>4.14</b>
	Medium 20-199 employees	<b>7.63</b>	<b>5.00</b>	<b>5.00</b>
What is your annual turnover range?	<\$500k	<b>6.92</b>	<b>4.86</b>	<b>3.82</b>
	\$500k-\$1 million	<b>7.04</b>	<b>5.18</b>	<b>4.38</b>
	\$1 million - \$2 million	<b>5.83</b>	<b>5.21</b>	<b>3.65</b>
	\$2 million-\$5 million	<b>7.65</b>	<b>5.06</b>	<b>4.00</b>
	\$5 million-\$10 million	<b>.00</b>	<b>.00</b>	<b>.00</b>
	\$10 million-\$50 million	<b>7.00</b>	<b>3.67</b>	<b>3.33</b>
	\$50 million+	<b>.</b>	<b>.</b>	<b>.</b>
What industry sector do you fall into?	Prefer not to say	<b>7.58</b>	<b>6.20</b>	<b>5.36</b>
	Accommodation & Food Services	<b>8.26</b>	<b>6.93</b>	<b>6.69</b>
	Administrative & Support Services	<b>3.33</b>	<b>3.67</b>	<b>2.17</b>
	Arts & Recreation Services	<b>6.93</b>	<b>5.21</b>	<b>4.14</b>
	Construction	<b>5.20</b>	<b>2.20</b>	<b>1.33</b>
	Education & Training	<b>4.89</b>	<b>3.33</b>	<b>1.50</b>
	Electricity, Gas, Water & Waste Services	<b>9.00</b>	<b>3.33</b>	<b>2.33</b>
	Financial & Insurance Services	<b>3.57</b>	<b>3.14</b>	<b>2.50</b>
	Health Care & Social Assistance	<b>7.05</b>	<b>2.30</b>	<b>.90</b>
	Information Media & Telecommunications	<b>5.40</b>	<b>4.40</b>	<b>2.80</b>
	Manufacturing	<b>5.42</b>	<b>2.54</b>	<b>.77</b>
	Professional, Scientific & Technical Services	<b>6.46</b>	<b>3.57</b>	<b>2.93</b>
	Public Administration & Safety	<b>2.50</b>	<b>4.50</b>	<b>5.00</b>
	Rental, Hiring & Real Estate Services	<b>7.40</b>	<b>6.80</b>	<b>5.60</b>
	Retail Trade	<b>7.96</b>	<b>6.61</b>	<b>5.40</b>
	Transport, Postal & Warehousing	<b>8.25</b>	<b>8.25</b>	<b>7.75</b>
	Wholesale Trade	<b>8.00</b>	<b>4.67</b>	<b>3.00</b>
	Other Services (please specify)	<b>5.67</b>	<b>4.36</b>	<b>3.31</b>

## Q11. How do you expect the following economies to perform over the next 12 months?

	Weaker	Slightly weaker	Subtotal Weaker	Same	Subtotal Same	Slightly stronger	Stronger	Subtotal Stronger	Total
National economy	27	93	120	118	118	55	8	63	301
	9.0%	30.9%	39.9%	39.2%	39.2%	18.3%	2.7%	20.9%	100.0%
South Australian economy	41	77	118	114	114	58	11	69	301
	13.6%	25.6%	39.2%	37.9%	37.9%	19.3%	3.7%	22.9%	100.0%
Local council area economy	32	75	107	132	132	55	7	62	301
	10.6%	24.9%	35.5%	43.9%	43.9%	18.3%	2.3%	20.6%	100.0%

### National economy

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
National economy	Weaker	17	1	6	2	1	27
		9.7%	2.1%	14.0%	9.1%	7.7%	9.0%
	Slightly weaker	56	17	8	8	4	93
		31.8%	36.2%	18.6%	36.4%	30.8%	30.9%
	Subtotal Weaker	73	18	14	10	5	120
		41.5%	38.3%	32.6%	45.5%	38.5%	39.9%
	Same	64	18	24	7	5	118
		36.4%	38.3%	55.8%	31.8%	38.5%	39.2%
	Subtotal Same	64	18	24	7	5	118
		36.4%	38.3%	55.8%	31.8%	38.5%	39.2%
	Slightly stronger	32	11	5	4	3	55
		18.2%	23.4%	11.6%	18.2%	23.1%	18.3%
	Stronger	7	0	0	1	0	8
		4.0%	.0%	.0%	4.5%	.0%	2.7%
	Subtotal Stronger	39	11	5	5	3	63
		22.2%	23.4%	11.6%	22.7%	23.1%	20.9%
Total		176	47	43	22	13	301
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		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
National economy	Weaker	12	5	9	1	27	26	1	27
		8.3%	8.2%	17.6%	2.2%	9.0%	9.3%	4.8%	9.0%
	Slightly weaker	47	16	15	15	93	83	10	93
		32.6%	26.2%	29.4%	33.3%	30.9%	29.6%	47.6%	30.9%
	Subtotal Weaker	59	21	24	16	120	109	11	120
		41.0%	34.4%	47.1%	35.6%	39.9%	38.9%	52.4%	39.9%
	Same	52	24	15	27	118	113	5	118
		36.1%	39.3%	29.4%	60.0%	39.2%	40.4%	23.8%	39.2%
	Subtotal Same	52	24	15	27	118	113	5	118
		36.1%	39.3%	29.4%	60.0%	39.2%	40.4%	23.8%	39.2%
	Slightly stronger	28	14	11	2	55	50	5	55
		19.4%	23.0%	21.6%	4.4%	18.3%	17.9%	23.8%	18.3%
	Stronger	5	2	1	0	8	8	0	8
		3.5%	3.3%	2.0%	.0%	2.7%	2.9%	.0%	2.7%
	Subtotal Stronger	33	16	12	2	63	58	5	63
		22.9%	26.2%	23.5%	4.4%	20.9%	20.7%	23.8%	20.9%
	Total	144	61	51	45	301	280	21	301
		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
National economy	Weaker	16	4	0	1	0	0	0	6
		11.9%	7.4%	.0%	5.6%	.0%	.0%	.0%	9.5%
	Slightly weaker	44	11	10	9	0	2	0	17
		32.6%	20.4%	38.5%	50.0%	.0%	66.7%	.0%	27.0%
	Subtotal Weaker	60	15	10	10	0	2	0	23
		44.4%	27.8%	38.5%	55.6%	.0%	66.7%	.0%	36.5%
	Same	49	20	11	5	2	1	0	30
		36.3%	37.0%	42.3%	27.8%	100.0%	33.3%	.0%	47.6%
	Subtotal Same	49	20	11	5	2	1	0	30
		36.3%	37.0%	42.3%	27.8%	100.0%	33.3%	.0%	47.6%
	Slightly stronger	23	17	4	3	0	0	0	8
		17.0%	31.5%	15.4%	16.7%	.0%	.0%	.0%	12.7%
	Stronger	3	2	1	0	0	0	0	2
		2.2%	3.7%	3.8%	.0%	.0%	.0%	.0%	3.2%
	Subtotal Stronger	26	19	5	3	0	0	0	10
		19.3%	35.2%	19.2%	16.7%	.0%	.0%	.0%	15.9%
	Total	135	54	26	18	2	3	0	63
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%

		National economy								
		Weaker	Slightly weaker	Subtotal Weaker	Same	Subtotal Same	Slightly stronger	Stronger	Subtotal Stronger	Total
What industry sector do you fall into?	Accommodation & Food Services	3 5.5%	18 32.7%	21 38.2%	21 38.2%	21 38.2%	9 16.4%	4 7.3%	13 23.6%	55 100.0%
	Administrative & Support Services	0 .0%	2 28.6%	2 28.6%	4 57.1%	4 57.1%	1 14.3%	0 .0%	1 14.3%	7 100.0%
	Arts & Recreation Services	3 21.4%	4 28.6%	7 50.0%	7 50.0%	7 50.0%	0 .0%	0 .0%	0 .0%	14 100.0%
	Construction	2 13.3%	5 33.3%	7 46.7%	6 40.0%	6 40.0%	2 13.3%	0 .0%	2 13.3%	15 100.0%
	Education & Training	0 .0%	5 45.5%	5 45.5%	5 45.5%	5 45.5%	1 9.1%	0 .0%	1 9.1%	11 100.0%
	Electricity, Gas, Water & Waste Services	0 .0%	2 66.7%	2 66.7%	0 .0%	0 .0%	1 33.3%	0 .0%	1 33.3%	3 100.0%
	Financial & Insurance Services	1 12.5%	3 37.5%	4 50.0%	2 25.0%	2 25.0%	2 25.0%	0 .0%	2 25.0%	8 100.0%
	Health Care & Social Assistance	1 4.8%	5 23.8%	6 28.6%	11 52.4%	11 52.4%	4 19.0%	0 .0%	4 19.0%	21 100.0%
	Information Media & Telecommunications	0 .0%	1 20.0%	1 20.0%	3 60.0%	3 60.0%	1 20.0%	0 .0%	1 20.0%	5 100.0%
	Manufacturing	2 15.4%	4 30.8%	6 46.2%	4 30.8%	4 30.8%	3 23.1%	0 .0%	3 23.1%	13 100.0%
	Professional, Scientific & Technical Services	2 13.3%	3 20.0%	5 33.3%	3 20.0%	3 20.0%	6 40.0%	1 6.7%	7 46.7%	15 100.0%
	Public Administration & Safety	0 .0%	1 50.0%	1 50.0%	0 .0%	0 .0%	1 50.0%	0 .0%	1 50.0%	2 100.0%
	Rental, Hiring & Real Estate Services	0 .0%	1 20.0%	1 20.0%	3 60.0%	3 60.0%	1 20.0%	0 .0%	1 20.0%	5 100.0%
	Retail Trade	9 10.0%	27 30.0%	36 40.0%	36 40.0%	36 40.0%	16 17.8%	2 2.2%	18 20.0%	90 100.0%
	Transport, Postal & Warehousing	1 20.0%	1 20.0%	2 40.0%	2 40.0%	2 40.0%	0 .0%	1 20.0%	1 20.0%	5 100.0%
	Wholesale Trade	0 .0%	2 66.7%	2 66.7%	0 .0%	0 .0%	1 33.3%	0 .0%	1 33.3%	3 100.0%
	Other Services (please specify)	3 10.3%	9 31.0%	12 41.4%	11 37.9%	11 37.9%	6 20.7%	0 .0%	6 20.7%	29 100.0%
	Total	27 9.0%	93 30.9%	120 39.9%	118 39.2%	118 39.2%	55 18.3%	8 2.7%	63 20.9%	301 100.0%

## South Australian economy

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
South Australian economy	Weaker	27 15.3%	3 6.4%	6 14.0%	3 13.6%	2 15.4%	41 13.6%
	Slightly weaker	46 26.1%	13 27.7%	8 18.6%	7 31.8%	3 23.1%	77 25.6%
	Subtotal Weaker	73 41.5%	16 34.0%	14 32.6%	10 45.5%	5 38.5%	118 39.2%
	Same	63 35.8%	19 40.4%	20 46.5%	7 31.8%	5 38.5%	114 37.9%
	Subtotal Same	63 35.8%	19 40.4%	20 46.5%	7 31.8%	5 38.5%	114 37.9%
	Slightly stronger	31 17.6%	11 23.4%	9 20.9%	4 18.2%	3 23.1%	58 19.3%
	Stronger	9 5.1%	1 2.1%	0 .0%	1 4.5%	0 .0%	11 3.7%
	Subtotal Stronger	40 22.7%	12 25.5%	9 20.9%	5 22.7%	3 23.1%	69 22.9%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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	20 13.9%	7 11.5%	9 17.6%	5 11.1%	41 13.6%	36 12.9%	5 23.8%	41 13.6%
	Slightly weaker	25 17.4%	16 26.2%	16 31.4%	20 44.4%	77 25.6%	70 25.0%	7 33.3%	77 25.6%
	Subtotal Weaker	45 31.3%	23 37.7%	25 49.0%	25 55.6%	118 39.2%	106 37.9%	12 57.1%	118 39.2%
	Same	62 43.1%	24 39.3%	13 25.5%	15 33.3%	114 37.9%	111 39.6%	3 14.3%	114 37.9%
	Subtotal Same	62 43.1%	24 39.3%	13 25.5%	15 33.3%	114 37.9%	111 39.6%	3 14.3%	114 37.9%
	Slightly stronger	30 20.8%	13 21.3%	10 19.6%	5 11.1%	58 19.3%	52 18.6%	6 28.6%	58 19.3%
	Stronger	7 4.9%	1 1.6%	3 5.9%	0 .0%	11 3.7%	11 3.9%	0 .0%	11 3.7%
	Subtotal Stronger	37 25.7%	14 23.0%	13 25.5%	5 11.1%	69 22.9%	63 22.5%	6 28.6%	69 22.9%
	Total	144 100.0%	61 100.0%	51 100.0%	45 100.0%	301 100.0%	280 100.0%	21 100.0%	301 100.0%

		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	
South Australian economy	Weaker	18	8	4	4	0	1	0	6	41
		13.3%	14.8%	15.4%	22.2%	.0%	33.3%	.0%	9.5%	13.6%
	Slightly weaker	33	12	9	5	2	1	0	15	77
		24.4%	22.2%	34.6%	27.8%	100.0%	33.3%	.0%	23.8%	25.6%
	Subtotal Weaker	51	20	13	9	2	2	0	21	118
		37.8%	37.0%	50.0%	50.0%	100.0%	66.7%	.0%	33.3%	39.2%
	Same	51	18	8	7	0	1	0	29	114
		37.8%	33.3%	30.8%	38.9%	.0%	33.3%	.0%	46.0%	37.9%
	Subtotal Same	51	18	8	7	0	1	0	29	114
		37.8%	33.3%	30.8%	38.9%	.0%	33.3%	.0%	46.0%	37.9%
	Slightly stronger	28	13	4	2	0	0	0	11	58
		20.7%	24.1%	15.4%	11.1%	.0%	.0%	.0%	17.5%	19.3%
	Stronger	5	3	1	0	0	0	0	2	11
		3.7%	5.6%	3.8%	.0%	.0%	.0%	.0%	3.2%	3.7%
	Subtotal Stronger	33	16	5	2	0	0	0	13	69
		24.4%	29.6%	19.2%	11.1%	.0%	.0%	.0%	20.6%	22.9%
Total		135	54	26	18	2	3	0	63	301
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%

		South Australian economy								Total
		Weaker	Slightly weaker	Subtotal Weaker	Same	Subtotal Same	Slightly stronger	Stronger	Subtotal Stronger	
What industry sector do you fall into?	Accommodation & Food Services	8	13	21	18	18	11	5	16	55
		14.5%	23.6%	38.2%	32.7%	32.7%	20.0%	9.1%	29.1%	100.0%
	Administrative & Support Services	0	1	1	5	5	1	0	1	7
		.0%	14.3%	14.3%	71.4%	71.4%	14.3%	.0%	14.3%	100.0%
	Arts & Recreation Services	2	3	5	5	5	4	0	4	14
		14.3%	21.4%	35.7%	35.7%	35.7%	28.6%	.0%	28.6%	100.0%
	Construction	3	4	7	4	4	4	0	4	15
		20.0%	26.7%	46.7%	26.7%	26.7%	26.7%	.0%	26.7%	100.0%
	Education & Training	0	6	6	4	4	1	0	1	11
		.0%	54.5%	54.5%	36.4%	36.4%	9.1%	.0%	9.1%	100.0%
	Electricity, Gas, Water & Waste Services	0	2	2	0	0	1	0	1	3
		.0%	66.7%	66.7%	.0%	.0%	33.3%	.0%	33.3%	100.0%
	Financial & Insurance Services	3	2	5	2	2	1	0	1	8
		37.5%	25.0%	62.5%	25.0%	25.0%	12.5%	.0%	12.5%	100.0%
	Health Care & Social Assistance	2	4	6	10	10	5	0	5	21
		9.5%	19.0%	28.6%	47.6%	47.6%	23.8%	.0%	23.8%	100.0%
	Information Media & Telecommunications	1	0	1	2	2	2	0	2	5
		20.0%	.0%	20.0%	40.0%	40.0%	40.0%	.0%	40.0%	100.0%
	Manufacturing	3	3	6	6	6	1	0	1	13
		23.1%	23.1%	46.2%	46.2%	46.2%	7.7%	.0%	7.7%	100.0%
	Professional, Scientific & Technical Services	3	4	7	2	2	5	1	6	15
		20.0%	26.7%	46.7%	13.3%	13.3%	33.3%	6.7%	40.0%	100.0%
	Public Administration & Safety	1	0	1	0	0	1	0	1	2
		50.0%	.0%	50.0%	.0%	.0%	50.0%	.0%	50.0%	100.0%
	Rental, Hiring & Real Estate Services	1	1	2	2	2	1	0	1	5
		20.0%	20.0%	40.0%	40.0%	40.0%	20.0%	.0%	20.0%	100.0%
	Retail Trade	11	28	39	34	34	13	4	17	90
		12.2%	31.1%	43.3%	37.8%	37.8%	14.4%	4.4%	18.9%	100.0%
	Transport, Postal & Warehousing	1	0	1	3	3	0	1	1	5
		20.0%	.0%	20.0%	60.0%	60.0%	.0%	20.0%	20.0%	100.0%
	Wholesale Trade	0	2	2	1	1	0	0	0	3
		.0%	66.7%	66.7%	33.3%	33.3%	.0%	.0%	.0%	100.0%



South Australian economy									
	Weaker	Slightly weaker	Subtotal Weaker	Same	Subtotal Same	Slightly stronger	Stronger	Subtotal Stronger	Total
Other Services (please specify)	2	4	6	16	16	7	0	7	29
	6.9%	13.8%	20.7%	55.2%	55.2%	24.1%	.0%	24.1%	100.0%
Total	41	77	118	114	114	58	11	69	301
	13.6%	25.6%	39.2%	37.9%	37.9%	19.3%	3.7%	22.9%	100.0%

### Local council area economy

In which suburb is your business located?							
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Local council area economy	Weaker	20	3	5	3	1	32
		11.4%	6.4%	11.6%	13.6%	7.7%	10.6%
	Slightly weaker	48	11	7	5	4	75
		27.3%	23.4%	16.3%	22.7%	30.8%	24.9%
	Subtotal Weaker	68	14	12	8	5	107
		38.6%	29.8%	27.9%	36.4%	38.5%	35.5%
	Same	72	20	24	9	7	132
		40.9%	42.6%	55.8%	40.9%	53.8%	43.9%
	Subtotal Same	72	20	24	9	7	132
		40.9%	42.6%	55.8%	40.9%	53.8%	43.9%
	Slightly stronger	31	13	6	4	1	55
		17.6%	27.7%	14.0%	18.2%	7.7%	18.3%
	Stronger	5	0	1	1	0	7
		2.8%	.0%	2.3%	4.5%	.0%	2.3%
	Subtotal Stronger	36	13	7	5	1	62
		20.5%	27.7%	16.3%	22.7%	7.7%	20.6%
	Total	176	47	43	22	13	301
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		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	16	5	8	3	32	29	3	32
		11.1%	8.2%	15.7%	6.7%	10.6%	10.4%	14.3%	10.6%
	Slightly weaker	27	17	15	16	75	68	7	75
		18.8%	27.9%	29.4%	35.6%	24.9%	24.3%	33.3%	24.9%
	Subtotal Weaker	43	22	23	19	107	97	10	107
		29.9%	36.1%	45.1%	42.2%	35.5%	34.6%	47.6%	35.5%
	Same	71	26	17	18	132	126	6	132
		49.3%	42.6%	33.3%	40.0%	43.9%	45.0%	28.6%	43.9%
	Subtotal Same	71	26	17	18	132	126	6	132
		49.3%	42.6%	33.3%	40.0%	43.9%	45.0%	28.6%	43.9%
	Slightly stronger	26	11	10	8	55	50	5	55
		18.1%	18.0%	19.6%	17.8%	18.3%	17.9%	23.8%	18.3%
	Stronger	4	2	1	0	7	7	0	7
		2.8%	3.3%	2.0%	.0%	2.3%	2.5%	.0%	2.3%
	Subtotal Stronger	30	13	11	8	62	57	5	62
		20.8%	21.3%	21.6%	17.8%	20.6%	20.4%	23.8%	20.6%
	Total	144	61	51	45	301	280	21	301
		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	
Local council area economy	Weaker	13	8	3	1	0	1	0	6	32
		9.6%	14.8%	11.5%	5.6%	.0%	33.3%	.0%	9.5%	10.6%
	Slightly weaker	33	10	8	7	1	1	0	15	75
		24.4%	18.5%	30.8%	38.9%	50.0%	33.3%	.0%	23.8%	24.9%
	Subtotal Weaker	46	18	11	8	1	2	0	21	107
		34.1%	33.3%	42.3%	44.4%	50.0%	66.7%	.0%	33.3%	35.5%
	Same	65	16	9	8	1	1	0	32	132
		48.1%	29.6%	34.6%	44.4%	50.0%	33.3%	.0%	50.8%	43.9%
	Subtotal Same	65	16	9	8	1	1	0	32	132
		48.1%	29.6%	34.6%	44.4%	50.0%	33.3%	.0%	50.8%	43.9%
	Slightly stronger	23	17	5	2	0	0	0	8	55
		17.0%	31.5%	19.2%	11.1%	.0%	.0%	.0%	12.7%	18.3%
	Stronger	1	3	1	0	0	0	0	2	7
		.7%	5.6%	3.8%	.0%	.0%	.0%	.0%	3.2%	2.3%
	Subtotal Stronger	24	20	6	2	0	0	0	10	62
		17.8%	37.0%	23.1%	11.1%	.0%	.0%	.0%	15.9%	20.6%
Total		135	54	26	18	2	3	0	63	301
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%

		Local council area economy								Total
		Weaker	Slightly weaker	Subtotal Weaker	Same	Subtotal Same	Slightly stronger	Stronger	Subtotal Stronger	
What industry sector do you fall into?	Accommodation & Food Services	6	16	22	22	22	9	2	11	55
		18.8%	21.3%	20.6%	16.7%	16.7%	16.4%	28.6%	17.7%	18.3%
	Administrative & Support Services	0	2	2	5	5	0	0	0	7
		.0%	2.7%	1.9%	3.8%	3.8%	.0%	.0%	.0%	2.3%
	Arts & Recreation Services	0	2	2	8	8	4	0	4	14
		.0%	2.7%	1.9%	6.1%	6.1%	7.3%	.0%	6.5%	4.7%
	Construction	3	3	6	6	6	3	0	3	15
		9.4%	4.0%	5.6%	4.5%	4.5%	5.5%	.0%	4.8%	5.0%
	Education & Training	0	2	2	7	7	2	0	2	11
		.0%	2.7%	1.9%	5.3%	5.3%	3.6%	.0%	3.2%	3.7%
	Electricity, Gas, Water & Waste Services	0	2	2	0	0	1	0	1	3
		.0%	2.7%	1.9%	.0%	.0%	1.8%	.0%	1.6%	1.0%
	Financial & Insurance Services	2	3	5	3	3	0	0	0	8
		6.3%	4.0%	4.7%	2.3%	2.3%	.0%	.0%	.0%	2.7%
	Health Care & Social Assistance	2	3	5	10	10	6	0	6	21
		6.3%	4.0%	4.7%	7.6%	7.6%	10.9%	.0%	9.7%	7.0%
	Information Media & Telecommunications	1	0	1	3	3	1	0	1	5
		3.1%	.0%	.9%	2.3%	2.3%	1.8%	.0%	1.6%	1.7%
	Manufacturing	1	4	5	7	7	1	0	1	13
		3.1%	5.3%	4.7%	5.3%	5.3%	1.8%	.0%	1.6%	4.3%
	Professional, Scientific & Technical Services	2	3	5	5	5	5	0	5	15
		6.3%	4.0%	4.7%	3.8%	3.8%	9.1%	.0%	8.1%	5.0%
	Public Administration & Safety	0	0	0	2	2	0	0	0	2
		.0%	.0%	.0%	1.5%	1.5%	.0%	.0%	.0%	.7%
	Rental, Hiring & Real Estate Services	1	0	1	2	2	2	0	2	5
		3.1%	.0%	.9%	1.5%	1.5%	3.6%	.0%	3.2%	1.7%
	Retail Trade	11	27	38	34	34	15	3	18	90
		34.4%	36.0%	35.5%	25.8%	25.8%	27.3%	42.9%	29.0%	29.9%
	Transport, Postal & Warehousing	1	1	2	2	2	0	1	1	5
		3.1%	1.3%	1.9%	1.5%	1.5%	.0%	14.3%	1.6%	1.7%

Local council area economy									
	Weaker	Slightly weaker	Subtotal Weaker	Same	Subtotal Same	Slightly stronger	Stronger	Subtotal Stronger	Total
Wholesale Trade	0	3	3	0	0	0	0	0	3
	.0%	4.0%	2.8%	.0%	.0%	.0%	.0%	.0%	1.0%
Other Services (please specify)	2	4	6	16	16	6	1	7	29
	6.3%	5.3%	5.6%	12.1%	12.1%	10.9%	14.3%	11.3%	9.6%
Total	32	75	107	132	132	55	7	62	301
	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 2019? Were they up, down or about the same as the previous quarter?**

	Up	Same	Down	Total
General business conditions	46	124	97	267
	17.2%	46.4%	36.3%	100.0%
Total sales/revenue	71	104	98	273
	26.0%	38.1%	35.9%	100.0%
Average wages	66	150	50	266
	24.8%	56.4%	18.8%	100.0%
Export sales	13	57	31	101
	12.9%	56.4%	30.7%	100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	79	131	27	237
	33.3%	55.3%	11.4%	100.0%
Selling prices	48	161	44	253
	19.0%	63.6%	17.4%	100.0%
Profitability	37	130	99	266
	13.9%	48.9%	37.2%	100.0%
Number of employees	36	186	44	266
	13.5%	69.9%	16.5%	100.0%
Overtime worked	42	127	44	213
	19.7%	59.6%	20.7%	100.0%
Investment in buildings and structures	28	103	35	166
	16.9%	62.0%	21.1%	100.0%
Investment in plant and equipment	42	124	36	202
	20.8%	61.4%	17.8%	100.0%
Investment in eCommerce	40	110	31	181
	22.1%	60.8%	17.1%	100.0%

**Q13. How do you expect the same business KPIs to perform in Q4 of 2019? Will they be up, down or about the same as the previous quarter?**

	Up	Same	Down	Total
General business conditions	77 29.1%	136 51.3%	52 19.6%	265 100.0%
Total sales/revenue	107 39.8%	98 36.4%	64 23.8%	269 100.0%
Average wages	67 25.5%	164 62.4%	32 12.2%	263 100.0%
Export sales	15 12.7%	83 70.3%	20 16.9%	118 100.0%
Non-wage labour costs (on-costs, i.e. superannuation, payroll taxes, etc.)	79 33.2%	138 58.0%	21 8.8%	238 100.0%
Selling prices	46 18.4%	176 70.4%	28 11.2%	250 100.0%
Profitability	76 28.8%	113 42.8%	75 28.4%	264 100.0%
Number of employees	37 14.2%	193 74.2%	30 11.5%	260 100.0%
Overtime worked	48 22.3%	135 62.8%	32 14.9%	215 100.0%
Investment in buildings and structures	20 12.0%	123 73.7%	24 14.4%	167 100.0%
Investment in plant and equipment	32 16.8%	126 66.3%	32 16.8%	190 100.0%
Investment in eCommerce	30 17.2%	120 69.0%	24 13.8%	174 100.0%

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

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Thinking about the next 12 months, how confident do you feel about your business prospects?	Extremely confident	19 10.8%	7 14.9%	4 9.3%	2 9.1%	1 7.7%	33 11.0%
	Fairly confident	68 38.6%	23 48.9%	18 41.9%	9 40.9%	6 46.2%	124 41.2%
	Subtotal Confident	87 49.4%	30 63.8%	22 51.2%	11 50.0%	7 53.8%	157 52.2%
	Neutral	48 27.3%	12 25.5%	13 30.2%	7 31.8%	4 30.8%	84 27.9%
	Subtotal Neutral	48 27.3%	12 25.5%	13 30.2%	7 31.8%	4 30.8%	84 27.9%
	Fairly worried	34 19.3%	5 10.6%	4 9.3%	4 18.2%	1 7.7%	48 15.9%
	Extremely worried	7 4.0%	0 .0%	4 9.3%	0 .0%	1 7.7%	12 4.0%
	Subtotal Worried	41 23.3%	5 10.6%	8 18.6%	4 18.2%	2 15.4%	60 19.9%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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 9.0%	11 18.0%	7 13.7%	2 4.4%	33 11.0%	29 10.4%	4 19.0%	33 11.0%
	Fairly confident	64 44.4%	22 36.1%	18 35.3%	20 44.4%	124 41.2%	116 41.4%	8 38.1%	124 41.2%
	Subtotal Confident	77 53.5%	33 54.1%	25 49.0%	22 48.9%	157 52.2%	145 51.8%	12 57.1%	157 52.2%
	Neutral	40 27.8%	14 23.0%	14 27.5%	16 35.6%	84 27.9%	78 27.9%	6 28.6%	84 27.9%
	Subtotal Neutral	40 27.8%	14 23.0%	14 27.5%	16 35.6%	84 27.9%	78 27.9%	6 28.6%	84 27.9%
	Fairly worried	21 14.6%	11 18.0%	10 19.6%	6 13.3%	48 15.9%	45 16.1%	3 14.3%	48 15.9%
	Extremely worried	6 4.2%	3 4.9%	2 3.9%	1 2.2%	12 4.0%	12 4.3%	0 .0%	12 4.0%
	Subtotal Worried	27 18.8%	14 23.0%	12 23.5%	7 15.6%	60 19.9%	57 20.4%	3 14.3%	60 19.9%
	Total	144 100.0%	61 100.0%	51 100.0%	45 100.0%	301 100.0%	280 100.0%	21 100.0%	301 100.0%

		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
Thinking about the next 12 months, how confident do you feel about your business prospects?	Extremely confident	7 5.2%	11 20.4%	1 3.8%	2 11.1%	0 .0%	0 .0%	0 .0%	12 19.0%
	Fairly confident	55 40.7%	19 35.2%	15 57.7%	11 61.1%	2 100.0%	0 .0%	0 .0%	22 34.9%
	Subtotal Confident	62 45.9%	30 55.6%	16 61.5%	13 72.2%	2 100.0%	0 .0%	0 .0%	34 54.0%
	Neutral	40 29.6%	13 24.1%	6 23.1%	2 11.1%	0 .0%	3 100.0%	0 .0%	20 31.7%
	Subtotal Neutral	40 29.6%	13 24.1%	6 23.1%	2 11.1%	0 .0%	3 100.0%	0 .0%	20 31.7%
	Fairly worried	23 17.0%	11 20.4%	4 15.4%	3 16.7%	0 .0%	0 .0%	0 .0%	7 11.1%
	Extremely worried	10 7.4%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	2 3.2%
	Subtotal Worried	33 24.4%	11 20.4%	4 15.4%	3 16.7%	0 .0%	0 .0%	0 .0%	9 14.3%
	Total	135 100.0%	54 100.0%	26 100.0%	18 100.0%	2 100.0%	3 100.0%	0 .0%	63 100.0%

		Thinking about the next 12 months, how confident do you feel about your business prospects?								
		Extremely confident	Fairly confident	Subtotal Confident	Neutral	Subtotal Neutral	Fairly worried	Extremely worried	Subtotal Worried	Total
What industry sector do you fall into?	Accommodation & Food Services	8 14.5%	17 30.9%	25 45.5%	18 32.7%	18 32.7%	12 21.8%	0 .0%	12 21.8%	55 100.0%
	Administrative & Support Services	0 .0%	2 28.6%	2 28.6%	5 71.4%	5 71.4%	0 .0%	0 .0%	0 .0%	7 100.0%
	Arts & Recreation Services	2 14.3%	5 35.7%	7 50.0%	2 14.3%	2 14.3%	4 28.6%	1 7.1%	5 35.7%	14 100.0%
	Construction	0 .0%	8 53.3%	8 53.3%	5 33.3%	5 33.3%	1 6.7%	1 6.7%	2 13.3%	15 100.0%
	Education & Training	3 27.3%	4 36.4%	7 63.6%	4 36.4%	4 36.4%	0 .0%	0 .0%	0 .0%	11 100.0%
	Electricity, Gas, Water & Waste Services	0 .0%	2 66.7%	2 66.7%	1 33.3%	1 33.3%	0 .0%	0 .0%	0 .0%	3 100.0%
	Financial & Insurance Services	1 12.5%	3 37.5%	4 50.0%	1 12.5%	1 12.5%	2 25.0%	1 12.5%	3 37.5%	8 100.0%
	Health Care & Social Assistance	3 14.3%	13 61.9%	16 76.2%	1 4.8%	1 4.8%	4 19.0%	0 .0%	4 19.0%	21 100.0%
	Information Media & Telecommunications	0 .0%	2 40.0%	2 40.0%	2 40.0%	2 40.0%	1 20.0%	0 .0%	1 20.0%	5 100.0%
	Manufacturing	1 7.7%	3 23.1%	4 30.8%	4 30.8%	4 30.8%	4 30.8%	1 7.7%	5 38.5%	13 100.0%
	Professional, Scientific & Technical Services	2 13.3%	9 60.0%	11 73.3%	2 13.3%	2 13.3%	1 6.7%	1 6.7%	2 13.3%	15 100.0%
	Public Administration & Safety	0 .0%	1 50.0%	1 50.0%	1 50.0%	1 50.0%	0 .0%	0 .0%	0 .0%	2 100.0%
	Rental, Hiring & Real Estate Services	1 20.0%	3 60.0%	4 80.0%	1 20.0%	1 20.0%	0 .0%	0 .0%	0 .0%	5 100.0%
	Retail Trade	10 11.1%	35 38.9%	45 50.0%	21 23.3%	21 23.3%	17 18.9%	7 7.8%	24 26.7%	90 100.0%
	Transport, Postal & Warehousing	0 .0%	1 20.0%	1 20.0%	3 60.0%	3 60.0%	1 20.0%	0 .0%	1 20.0%	5 100.0%
	Wholesale Trade	0 .0%	1 33.3%	1 33.3%	2 66.7%	2 66.7%	0 .0%	0 .0%	0 .0%	3 100.0%
	Other Services (please specify)	2 6.9%	15 51.7%	17 58.6%	11 37.9%	11 37.9%	1 3.4%	0 .0%	1 3.4%	29 100.0%
	Total	33 11.0%	124 41.2%	157 52.2%	84 27.9%	84 27.9%	48 15.9%	12 4.0%	60 19.9%	301 100.0%

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

		In which suburb is your business located?				
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff
As far as business is concerned, what problems, if any, are you facing at the moment?	Costs or overheads	87	22	16	12	4
		49.4%	46.8%	37.2%	54.5%	30.8%
	Economic climate	74	17	18	10	5
		42.0%	36.2%	41.9%	45.5%	38.5%
	Taxes	63	22	15	10	7
		35.8%	46.8%	34.9%	45.5%	53.8%
	Lack of work or sales	72	14	14	6	3
		40.9%	29.8%	32.6%	27.3%	23.1%
	Cash flow, bad debts or profitability	50	15	11	4	1
		28.4%	31.9%	25.6%	18.2%	7.7%
	Competition	52	14	8	6	1
		29.5%	29.8%	18.6%	27.3%	7.7%
	Paperwork or bureaucracy	30	11	14	7	5
		17.0%	23.4%	32.6%	31.8%	38.5%
	Finding or keeping staff	30	10	2	3	0
		17.0%	21.3%	4.7%	13.6%	.0%
	There are no problems at the moment	17	8	7	2	2
		9.7%	17.0%	16.3%	9.1%	15.4%
	Other	20	4	4	3	1
		11.4%	8.5%	9.3%	13.6%	7.7%
	Total	176	47	43	22	13
		100.0%	100.0%	100.0%	100.0%	100.0%

		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
As far as business is concerned, what problems, if any, are you facing at the moment?	Costs or overheads	58	25	28	30	141	128	13	141
		40.3%	41.0%	54.9%	66.7%	46.8%	45.7%	61.9%	46.8%
	Economic climate	49	26	19	30	124	114	10	124
		34.0%	42.6%	37.3%	66.7%	41.2%	40.7%	47.6%	41.2%
	Taxes	47	21	26	23	117	105	12	117
		32.6%	34.4%	51.0%	51.1%	38.9%	37.5%	57.1%	38.9%
	Lack of work or sales	58	20	18	13	109	102	7	109
		40.3%	32.8%	35.3%	28.9%	36.2%	36.4%	33.3%	36.2%
	Cash flow, bad debts or profitability	39	15	16	11	81	77	4	81
		27.1%	24.6%	31.4%	24.4%	26.9%	27.5%	19.0%	26.9%
	Competition	34	16	15	16	81	74	7	81
		23.6%	26.2%	29.4%	35.6%	26.9%	26.4%	33.3%	26.9%
	Paperwork or bureaucracy	23	15	15	14	67	60	7	67
		16.0%	24.6%	29.4%	31.1%	22.3%	21.4%	33.3%	22.3%
	Finding or keeping staff	18	11	11	5	45	42	3	45
		12.5%	18.0%	21.6%	11.1%	15.0%	15.0%	14.3%	15.0%
	There are no problems at the moment	21	11	3	1	36	33	3	36
		14.6%	18.0%	5.9%	2.2%	12.0%	11.8%	14.3%	12.0%
	Other	19	3	5	5	32	32	0	32
		13.2%	4.9%	9.8%	11.1%	10.6%	11.4%	.0%	10.6%
Total		144	61	51	45	301	280	21	301
		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
As far as business is concerned, what problems, if any, are you facing at the moment?	Costs or overheads	56	31	13	12	1	2	0	26
		41.5%	57.4%	50.0%	66.7%	50.0%	66.7%	.0%	41.3%
	Economic climate	42	26	16	13	0	2	0	25
		31.1%	48.1%	61.5%	72.2%	.0%	66.7%	.0%	39.7%
	Taxes	52	26	9	9	2	2	0	17
		38.5%	48.1%	34.6%	50.0%	100.0%	66.7%	.0%	27.0%
	Lack of work or sales	57	23	3	6	1	1	0	18
		42.2%	42.6%	11.5%	33.3%	50.0%	33.3%	.0%	28.6%
	Cash flow, bad debts or profitability	38	16	8	5	0	1	0	13
		28.1%	29.6%	30.8%	27.8%	.0%	33.3%	.0%	20.6%
	Competition	29	20	8	10	1	0	0	13
		21.5%	37.0%	30.8%	55.6%	50.0%	.0%	.0%	20.6%
	Paperwork or bureaucracy	27	18	3	5	2	1	0	11
		20.0%	33.3%	11.5%	27.8%	100.0%	33.3%	.0%	17.5%
	Finding or keeping staff	12	14	5	3	0	0	0	11
		8.9%	25.9%	19.2%	16.7%	.0%	.0%	.0%	17.5%
	There are no problems at the moment	21	5	1	0	0	0	0	9
		15.6%	9.3%	3.8%	.0%	.0%	.0%	.0%	14.3%
	Other	13	5	2	1	0	0	0	11
		9.6%	9.3%	7.7%	5.6%	.0%	.0%	.0%	17.5%
Total		135	54	26	18	2	3	0	63
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%



As far as business is concerned, what problems, if any, are you facing at the moment?											
	Costs or overheads	Economic climate	Taxes	Lack of work or sales	Cash flow, bad debts or profitability	Competition	Paperwork or bureaucracy	Finding or keeping staff	There are no problems at the moment	Other	Total
Accommodation & Food Services	30	20	24	29	22	20	9	21	4	9	55
	54.5%	36.4%	43.6%	52.7%	40.0%	36.4%	16.4%	38.2%	7.3%	16.4%	100.0%
Administrative & Support Services	3	2	4	1	1	2	2	1	2	1	7
	42.9%	28.6%	57.1%	14.3%	14.3%	28.6%	28.6%	14.3%	28.6%	14.3%	100.0%
Arts & Recreation Services	7	6	3	4	4	2	1	1	1	1	14
	50.0%	42.9%	21.4%	28.6%	28.6%	14.3%	7.1%	7.1%	7.1%	7.1%	100.0%
Construction	6	7	6	5	8	4	6	2	0	0	15
	40.0%	46.7%	40.0%	33.3%	53.3%	26.7%	40.0%	13.3%	.0%	.0%	100.0%
Education & Training	3	3	1	1	0	3	2	0	3	1	11
	27.3%	27.3%	9.1%	9.1%	.0%	27.3%	18.2%	.0%	27.3%	9.1%	100.0%
Electricity, Gas, Water & Waste Services	1	0	1	2	1	0	1	0	1	0	3
	33.3%	.0%	33.3%	66.7%	33.3%	.0%	33.3%	.0%	33.3%	.0%	100.0%
Financial & Insurance Services	5	5	4	3	3	0	4	0	0	1	8
	62.5%	62.5%	50.0%	37.5%	37.5%	.0%	50.0%	.0%	.0%	12.5%	100.0%
Health Care & Social Assistance	12	8	5	5	3	7	8	5	2	1	21
	57.1%	38.1%	23.8%	23.8%	14.3%	33.3%	38.1%	23.8%	9.5%	4.8%	100.0%
Information Media & Telecommunications	1	1	1	2	0	1	0	0	1	0	5
	20.0%	20.0%	20.0%	40.0%	.0%	20.0%	.0%	.0%	20.0%	.0%	100.0%
Manufacturing	7	4	6	6	3	3	3	3	2	0	13
	53.8%	30.8%	46.2%	46.2%	23.1%	23.1%	23.1%	23.1%	15.4%	.0%	100.0%
Professional, Scientific & Technical Services	5	4	7	6	2	2	7	0	3	0	15
	33.3%	26.7%	46.7%	40.0%	13.3%	13.3%	46.7%	.0%	20.0%	.0%	100.0%
Public Administration & Safety	0	0	1	1	0	0	0	0	0	0	2
	.0%	.0%	50.0%	50.0%	.0%	.0%	.0%	.0%	.0%	.0%	100.0%
Rental, Hiring & Real Estate Services	4	4	3	1	0	2	1	0	1	0	5
	80.0%	80.0%	60.0%	20.0%	.0%	40.0%	20.0%	.0%	20.0%	.0%	100.0%
Retail Trade	47	47	36	30	25	26	19	10	11	12	90
	52.2%	52.2%	40.0%	33.3%	27.8%	28.9%	21.1%	11.1%	12.2%	13.3%	100.0%
Transport, Postal & Warehousing	1	3	3	2	1	2	1	1	1	0	5
	20.0%	60.0%	60.0%	40.0%	20.0%	40.0%	20.0%	20.0%	20.0%	.0%	100.0%
Wholesale Trade	1	2	2	2	1	1	0	0	0	0	3
	33.3%	66.7%	66.7%	66.7%	33.3%	33.3%	.0%	.0%	.0%	.0%	100.0%
Other Services (please specify)	8	8	10	9	7	6	3	1	4	6	29
	27.6%	27.6%	34.5%	31.0%	24.1%	20.7%	10.3%	3.4%	13.8%	20.7%	100.0%
Total	141	124	117	109	81	81	67	45	36	32	301
	46.8%	41.2%	38.9%	36.2%	26.9%	26.9%	22.3%	15.0%	12.0%	10.6%	100.0%

What industry sector do you fall into?

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

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
What are the barriers to taking on new employees?	Cost of employing	73 41.5%	22 46.8%	20 46.5%	12 54.5%	5 38.5%	132 43.9%
	Finding suitable/quality staff	68 38.6%	22 46.8%	15 34.9%	7 31.8%	2 15.4%	114 37.9%
	Don't need any more staff	59 33.5%	17 36.2%	24 55.8%	7 31.8%	7 53.8%	114 37.9%
	Lack of work/sales	67 38.1%	15 31.9%	9 20.9%	5 22.7%	2 15.4%	98 32.6%
	Profitability/lack of profits	55 31.3%	11 23.4%	12 27.9%	10 45.5%	4 30.8%	92 30.6%
	Lack of funds	29 16.5%	10 21.3%	7 16.3%	8 36.4%	1 7.7%	55 18.3%
	Finding those who want to work	27 15.3%	14 29.8%	5 11.6%	1 4.5%	0 .0%	47 15.6%
	Lack of cash flow	22 12.5%	7 14.9%	6 14.0%	2 9.1%	0 .0%	37 12.3%
	Business is closing/winding down	3 1.7%	2 4.3%	1 2.3%	1 4.5%	0 .0%	7 2.3%
	Other	10 5.7%	4 8.5%	1 2.3%	1 4.5%	3 23.1%	19 6.3%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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
What are the barriers to taking on new employees?	Cost of employing	56 38.9%	32 52.5%	24 47.1%	20 44.4%	132 43.9%	120 42.9%	12 57.1%	132 43.9%
	Finding suitable/quality staff	47 32.6%	20 32.8%	26 51.0%	21 46.7%	114 37.9%	103 36.8%	11 52.4%	114 37.9%
	Don't need any more staff	59 41.0%	26 42.6%	13 25.5%	16 35.6%	114 37.9%	109 38.9%	5 23.8%	114 37.9%
	Lack of work/sales	40 27.8%	23 37.7%	19 37.3%	16 35.6%	98 32.6%	90 32.1%	8 38.1%	98 32.6%
	Profitability/lack of profits	45 31.3%	14 23.0%	19 37.3%	14 31.1%	92 30.6%	86 30.7%	6 28.6%	92 30.6%
	Lack of funds	25 17.4%	9 14.8%	11 21.6%	10 22.2%	55 18.3%	51 18.2%	4 19.0%	55 18.3%
	Finding those who want to work	17 11.8%	8 13.1%	14 27.5%	8 17.8%	47 15.6%	43 15.4%	4 19.0%	47 15.6%
	Lack of cash flow	16 11.1%	6 9.8%	7 13.7%	8 17.8%	37 12.3%	36 12.9%	1 4.8%	37 12.3%
	Business is closing/winding down	2 1.4%	2 3.3%	3 5.9%	0 .0%	7 2.3%	7 2.5%	0 .0%	7 2.3%
	Other	10 6.9%	4 6.6%	1 2.0%	4 8.9%	19 6.3%	19 6.8%	0 .0%	19 6.3%
	Total	144 100.0%	61 100.0%	51 100.0%	45 100.0%	301 100.0%	280 100.0%	21 100.0%	301 100.0%

		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	
What are the barriers to taking on new employees?	Cost of employing	59 43.7%	22 40.7%	14 53.8%	8 44.4%	2 100.0%	1 33.3%	0 .0%	26 41.3%	132 43.9%	
	Finding suitable/quality staff	35 25.9%	29 53.7%	11 42.3%	12 66.7%	1 50.0%	0 .0%	0 .0%	26 41.3%	114 37.9%	
	Don't need any more staff	56 41.5%	18 33.3%	11 42.3%	5 27.8%	1 50.0%	1 33.3%	0 .0%	22 34.9%	114 37.9%	
	Lack of work/sales	43 31.9%	18 33.3%	10 38.5%	8 44.4%	0 .0%	1 33.3%	0 .0%	18 28.6%	98 32.6%	
	Profitability/lack of profits	48 35.6%	17 31.5%	7 26.9%	4 22.2%	1 50.0%	2 66.7%	0 .0%	13 20.6%	92 30.6%	
	Lack of funds	31 23.0%	9 16.7%	7 26.9%	1 5.6%	0 .0%	0 .0%	0 .0%	7 11.1%	55 18.3%	
	Finding those who want to work	13 9.6%	12 22.2%	4 15.4%	6 33.3%	0 .0%	0 .0%	0 .0%	12 19.0%	47 15.6%	
	Lack of cash flow	21 15.6%	7 13.0%	4 15.4%	0 .0%	0 .0%	0 .0%	0 .0%	5 7.9%	37 12.3%	
	Business is closing/winding down	3 2.2%	2 3.7%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	2 3.2%	7 2.3%	
	Other	14 10.4%	2 3.7%	1 3.8%	0 .0%	0 .0%	0 .0%	0 .0%	2 3.2%	19 6.3%	
	Total	135 100.0%	54 100.0%	26 100.0%	18 100.0%	2 100.0%	3 100.0%	0 .0%	63 100.0%	301 100.0%	

	What are the barriers to taking on new employees?										
	Cost of employing Finding suitable/quality staff	Don't need any more staff	Lack of work/sales	Profitability/lack of profits	Lack of funds Finding those who want to work	Lack of cash flow Business is closing/winding down	Other	Total			
Accommodation & Food Services	28 50.9%	29 52.7%	15 27.3%	21 38.2%	22 40.0%	6 10.9%	17 30.9%	7 12.7%	2 3.6%	1 1.8%	55 100.0%
Administrative & Support Services	3 42.9%	2 28.6%	3 42.9%	0 .0%	2 28.6%	1 14.3%	0 .0%	1 14.3%	0 .0%	2 28.6%	7 100.0%
Arts & Recreation Services	7 50.0%	4 28.6%	4 28.6%	4 28.6%	5 35.7%	6 42.9%	0 .0%	2 14.3%	0 .0%	2 14.3%	14 100.0%
Construction	6 40.0%	5 33.3%	8 53.3%	5 33.3%	5 33.3%	4 26.7%	1 6.7%	2 13.3%	2 13.3%	0 .0%	15 100.0%
Education & Training	3 27.3%	2 18.2%	4 36.4%	1 9.1%	1 9.1%	2 18.2%	0 .0%	0 .0%	0 .0%	2 18.2%	11 100.0%
Electricity, Gas, Water & Waste Services	1 33.3%	0 .0%	1 33.3%	2 66.7%	1 33.3%	1 33.3%	0 .0%	1 33.3%	0 .0%	0 .0%	3 100.0%
Financial & Insurance Services	5 62.5%	2 25.0%	3 37.5%	1 12.5%	3 37.5%	2 25.0%	1 12.5%	2 25.0%	0 .0%	0 .0%	8 100.0%
Health Care & Social Assistance	8 38.1%	10 47.6%	7 33.3%	6 28.6%	4 19.0%	3 14.3%	4 19.0%	1 4.8%	0 .0%	2 9.5%	21 100.0%
Information Media & Telecommunications	1 20.0%	1 20.0%	2 40.0%	2 40.0%	1 20.0%	0 .0%	1 20.0%	0 .0%	0 .0%	1 20.0%	5 100.0%
Manufacturing	9 69.2%	6 46.2%	4 30.8%	5 38.5%	5 38.5%	5 38.5%	3 23.1%	2 15.4%	2 15.4%	0 .0%	13 100.0%
Professional, Scientific & Technical Services	9 60.0%	2 13.3%	8 53.3%	4 26.7%	6 40.0%	2 13.3%	0 .0%	0 .0%	0 .0%	2 13.3%	15 100.0%
Public Administration & Safety	0 .0%	0 .0%	1 50.0%	2 100.0%	0 .0%	0 .0%	1 50.0%	0 .0%	0 .0%	0 .0%	2 100.0%
Rental, Hiring & Real Estate Services	4 80.0%	3 60.0%	1 20.0%	3 60.0%	2 40.0%	2 40.0%	1 20.0%	1 20.0%	1 20.0%	0 .0%	5 100.0%
Retail Trade	34 37.8%	41 45.6%	38 42.2%	32 35.6%	26 28.9%	14 15.6%	13 14.4%	16 17.8%	0 .0%	2 2.2%	90 100.0%
Transport, Postal & Warehousing	2 40.0%	0 .0%	4 80.0%	1 20.0%	1 20.0%	1 20.0%	0 .0%	0 .0%	0 .0%	0 .0%	5 100.0%
Wholesale Trade	2 66.7%	0 .0%	0 .0%	2 66.7%	1 33.3%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	3 100.0%
Other Services (please specify)	10 34.5%	7 24.1%	11 37.9%	7 24.1%	7 24.1%	6 20.7%	5 17.2%	2 6.9%	0 .0%	5 17.2%	29 100.0%
Total	132 43.9%	114 37.9%	114 37.9%	98 32.6%	92 30.6%	55 18.3%	47 15.6%	37 12.3%	7 2.3%	19 6.3%	301 100.0%

What industry sector do you fall into?

## Q17. What industry sector do you fall into?

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
What industry sector do you fall into?	Retail Trade	66 37.5%	11 23.4%	12 27.9%	1 4.5%	0 .0%	90 29.9%
	Accommodation & Food Services	46 26.1%	1 2.1%	6 14.0%	1 4.5%	1 7.7%	55 18.3%
	Health Care & Social Assistance	7 4.0%	2 4.3%	4 9.3%	7 31.8%	1 7.7%	21 7.0%
	Construction	7 4.0%	4 8.5%	1 2.3%	2 9.1%	1 7.7%	15 5.0%
	Professional, Scientific & Technical Services	8 4.5%	1 2.1%	3 7.0%	1 4.5%	2 15.4%	15 5.0%
	Arts & Recreation Services	6 3.4%	3 6.4%	1 2.3%	3 13.6%	1 7.7%	14 4.7%
	Manufacturing	3 1.7%	8 17.0%	1 2.3%	1 4.5%	0 .0%	13 4.3%
	Education & Training	6 3.4%	2 4.3%	0 .0%	2 9.1%	1 7.7%	11 3.7%
	Financial & Insurance Services	3 1.7%	2 4.3%	3 7.0%	0 .0%	0 .0%	8 2.7%
	Administrative & Support Services	1 .6%	1 2.1%	3 7.0%	1 4.5%	1 7.7%	7 2.3%
	Information Media & Telecommunications	2 1.1%	1 2.1%	2 4.7%	0 .0%	0 .0%	5 1.7%
	Rental, Hiring & Real Estate Services	3 1.7%	1 2.1%	1 2.3%	0 .0%	0 .0%	5 1.7%
	Transport, Postal & Warehousing	1 .6%	1 2.1%	0 .0%	2 9.1%	1 7.7%	5 1.7%
	Electricity, Gas, Water & Waste Services	2 1.1%	0 .0%	0 .0%	1 4.5%	0 .0%	3 1.0%
	Wholesale Trade	1 .6%	1 2.1%	0 .0%	0 .0%	1 7.7%	3 1.0%
	Public Administration & Safety	2 1.1%	0 .0%	0 .0%	0 .0%	0 .0%	2 .7%
	Other Services (please specify)	12 6.8%	8 17.0%	6 14.0%	0 .0%	3 23.1%	29 9.6%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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
What industry sector do you fall into?	Retail Trade	32	23	15	20	90	84	6	90
		22.2%	37.7%	29.4%	44.4%	29.9%	30.0%	28.6%	29.9%
	Accommodation & Food Services	29	11	10	5	55	49	6	55
		20.1%	18.0%	19.6%	11.1%	18.3%	17.5%	28.6%	18.3%
	Health Care & Social Assistance	11	1	5	4	21	21	0	21
		7.6%	1.6%	9.8%	8.9%	7.0%	7.5%	.0%	7.0%
	Construction	8	3	2	2	15	15	0	15
		5.6%	4.9%	3.9%	4.4%	5.0%	5.4%	.0%	5.0%
	Professional, Scientific & Technical Services	6	5	3	1	15	13	2	15
		4.2%	8.2%	5.9%	2.2%	5.0%	4.6%	9.5%	5.0%
	Arts & Recreation Services	12	1	0	1	14	13	1	14
		8.3%	1.6%	.0%	2.2%	4.7%	4.6%	4.8%	4.7%
	Manufacturing	5	1	5	2	13	12	1	13
		3.5%	1.6%	9.8%	4.4%	4.3%	4.3%	4.8%	4.3%
	Education & Training	6	2	0	3	11	8	3	11
		4.2%	3.3%	.0%	6.7%	3.7%	2.9%	14.3%	3.7%
	Financial & Insurance Services	5	1	1	1	8	7	1	8
		3.5%	1.6%	2.0%	2.2%	2.7%	2.5%	4.8%	2.7%
	Administrative & Support Services	1	3	2	1	7	7	0	7
		.7%	4.9%	3.9%	2.2%	2.3%	2.5%	.0%	2.3%
	Information Media & Telecommunications	2	0	2	1	5	5	0	5
		1.4%	.0%	3.9%	2.2%	1.7%	1.8%	.0%	1.7%
	Rental, Hiring & Real Estate Services	1	2	0	2	5	4	1	5
		.7%	3.3%	.0%	4.4%	1.7%	1.4%	4.8%	1.7%
	Transport, Postal & Warehousing	4	0	1	0	5	5	0	5
		2.8%	.0%	2.0%	.0%	1.7%	1.8%	.0%	1.7%
	Electricity, Gas, Water & Waste Services	2	1	0	0	3	3	0	3
		1.4%	1.6%	.0%	.0%	1.0%	1.1%	.0%	1.0%
	Wholesale Trade	1	2	0	0	3	3	0	3
		.7%	3.3%	.0%	.0%	1.0%	1.1%	.0%	1.0%
	Public Administration & Safety	2	0	0	0	2	2	0	2
		1.4%	.0%	.0%	.0%	.7%	.7%	.0%	.7%
	Other Services (please specify)	17	5	5	2	29	29	0	29
		11.8%	8.2%	9.8%	4.4%	9.6%	10.4%	.0%	9.6%
Total		144	61	51	45	301	280	21	301
		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	
What industry sector do you fall into?	Retail Trade	28	22	9	9	0	1	0	21	90	
		20.7%	40.7%	34.6%	50.0%	.0%	33.3%	.0%	33.3%	29.9%	
	Accommodation & Food Services	18	12	3	2	0	0	0	20	55	
		13.3%	22.2%	11.5%	11.1%	.0%	.0%	.0%	31.7%	18.3%	
	Health Care & Social Assistance	10	7	1	1	0	0	0	2	21	
		7.4%	13.0%	3.8%	5.6%	.0%	.0%	.0%	3.2%	7.0%	
	Construction	5	1	3	2	0	1	0	3	15	
		3.7%	1.9%	11.5%	11.1%	.0%	33.3%	.0%	4.8%	5.0%	
	Professional, Scientific & Technical Services	10	2	1	1	1	0	0	0	15	
		7.4%	3.7%	3.8%	5.6%	50.0%	.0%	.0%	.0%	5.0%	
	Arts & Recreation Services	10	1	1	1	0	0	0	1	14	
		7.4%	1.9%	3.8%	5.6%	.0%	.0%	.0%	1.6%	4.7%	
	Manufacturing	9	1	2	0	0	0	0	1	13	
		6.7%	1.9%	7.7%	.0%	.0%	.0%	.0%	1.6%	4.3%	
	Education & Training	5	0	4	0	0	0	0	2	11	
		3.7%	.0%	15.4%	.0%	.0%	.0%	.0%	3.2%	3.7%	
	Financial & Insurance Services	3	3	1	0	1	0	0	0	8	
		2.2%	5.6%	3.8%	.0%	50.0%	.0%	.0%	.0%	2.7%	
	Administrative & Support Services	4	1	0	0	0	0	0	2	7	
		3.0%	1.9%	.0%	.0%	.0%	.0%	.0%	3.2%	2.3%	
	Information Media & Telecommunications	4	0	1	0	0	0	0	0	5	
		3.0%	.0%	3.8%	.0%	.0%	.0%	.0%	.0%	1.7%	
	Rental, Hiring & Real Estate Services	0	0	0	1	0	1	0	3	5	
		.0%	.0%	.0%	5.6%	.0%	33.3%	.0%	4.8%	1.7%	
	Transport, Postal & Warehousing	4	1	0	0	0	0	0	0	5	
		3.0%	1.9%	.0%	.0%	.0%	.0%	.0%	.0%	1.7%	
	Electricity, Gas, Water & Waste Services	3	0	0	0	0	0	0	0	3	
		2.2%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	1.0%	
	Wholesale Trade	2	0	0	0	0	0	0	1	3	
		1.5%	.0%	.0%	.0%	.0%	.0%	.0%	1.6%	1.0%	
	Public Administration & Safety	2	0	0	0	0	0	0	0	2	
		1.5%	.0%	.0%	.0%	.0%	.0%	.0%	.0%	.7%	
	Other Services (please specify)	18	3	0	1	0	0	0	7	29	
		13.3%	5.6%	.0%	5.6%	.0%	.0%	.0%	11.1%	9.6%	
Total		135	54	26	18	2	3	0	63	301	
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%	100.0%	

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

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Do you generally believe that profitability is declining in the retail sector at the moment?	Yes	136 77.3%	36 76.6%	32 74.4%	18 81.8%	9 69.2%	231 76.7%
	No	14 8.0%	2 4.3%	5 11.6%	2 9.1%	0 .0%	23 7.6%
	Don't know/not sure	26 14.8%	9 19.1%	6 14.0%	2 9.1%	4 30.8%	47 15.6%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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	105 72.9%	47 77.0%	38 74.5%	41 91.1%	231 76.7%	215 76.8%	16 76.2%	231 76.7%
	No	15 10.4%	5 8.2%	2 3.9%	1 2.2%	23 7.6%	21 7.5%	2 9.5%	23 7.6%
	Don't know/not sure	24 16.7%	9 14.8%	11 21.6%	3 6.7%	47 15.6%	44 15.7%	3 14.3%	47 15.6%
	Total	144 100.0%	61 100.0%	51 100.0%	45 100.0%	301 100.0%	280 100.0%	21 100.0%	301 100.0%

		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
Do you generally believe that profitability is declining in the retail sector at the moment?	Yes	109 80.7%	44 81.5%	22 84.6%	17 94.4%	2 100.0%	2 66.7%	0 .0%	35 55.6%
	No	9 6.7%	5 9.3%	1 3.8%	1 5.6%	0 .0%	0 .0%	0 .0%	7 11.1%
	Don't know/not sure	17 12.6%	5 9.3%	3 11.5%	0 .0%	0 .0%	1 33.3%	0 .0%	21 33.3%
	Total	135 100.0%	54 100.0%	26 100.0%	18 100.0%	2 100.0%	3 100.0%	0 .0%	63 100.0%



		Do you generally believe that profitability is declining in the retail sector at the moment?			
		Yes	No	Don't know/not sure	Total
What industry sector do you fall into?	Accommodation & Food Services	41 74.5%	3 5.5%	11 20.0%	55 100.0%
	Administrative & Support Services	7 100.0%	0 .0%	0 .0%	7 100.0%
	Arts & Recreation Services	11 78.6%	1 7.1%	2 14.3%	14 100.0%
	Construction	11 73.3%	2 13.3%	2 13.3%	15 100.0%
	Education & Training	7 63.6%	2 18.2%	2 18.2%	11 100.0%
	Electricity, Gas, Water & Waste Services	2 66.7%	1 33.3%	0 .0%	3 100.0%
	Financial & Insurance Services	8 100.0%	0 .0%	0 .0%	8 100.0%
	Health Care & Social Assistance	19 90.5%	1 4.8%	1 4.8%	21 100.0%
	Information Media & Telecommunications	3 60.0%	0 .0%	2 40.0%	5 100.0%
	Manufacturing	9 69.2%	2 15.4%	2 15.4%	13 100.0%
	Professional, Scientific & Technical Services	10 66.7%	1 6.7%	4 26.7%	15 100.0%
	Public Administration & Safety	2 100.0%	0 .0%	0 .0%	2 100.0%
	Rental, Hiring & Real Estate Services	3 60.0%	0 .0%	2 40.0%	5 100.0%
	Retail Trade	74 82.2%	8 8.9%	8 8.9%	90 100.0%
	Transport, Postal & Warehousing	4 80.0%	0 .0%	1 20.0%	5 100.0%
	Wholesale Trade	2 66.7%	0 .0%	1 33.3%	3 100.0%
	Other Services (please specify)	18 62.1%	2 6.9%	9 31.0%	29 100.0%
	Total	231 76.7%	23 7.6%	47 15.6%	301 100.0%

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

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Are any of the following affecting/impacting on your profitability?	Cost of rent	98 55.7%	16 34.0%	22 51.2%	9 40.9%	6 46.2%	151 50.2%
	Local economy	74 42.0%	18 38.3%	19 44.2%	11 50.0%	3 23.1%	125 41.5%
	Cost of labour	72 40.9%	19 40.4%	16 37.2%	8 36.4%	5 38.5%	120 39.9%
	Lack of sales	73 41.5%	20 42.6%	15 34.9%	7 31.8%	4 30.8%	119 39.5%
	Cost of power	56 31.8%	18 38.3%	15 34.9%	9 40.9%	4 30.8%	102 33.9%
	Competition - online	51 29.0%	22 46.8%	16 37.2%	5 22.7%	3 23.1%	97 32.2%
	Low margins	54 30.7%	21 44.7%	11 25.6%	7 31.8%	3 23.1%	96 31.9%
	Weather	57 32.4%	8 17.0%	7 16.3%	0 .0%	4 30.8%	76 25.2%
	Competition - bricks and mortar	29 16.5%	9 19.1%	5 11.6%	6 27.3%	1 7.7%	50 16.6%
	Lack of tourists	31 17.6%	1 2.1%	1 2.3%	1 4.5%	3 23.1%	37 12.3%
	Other	11 6.3%	4 8.5%	3 7.0%	3 13.6%	2 15.4%	23 7.6%
	Total	176 100.0%	47 100.0%	43 100.0%	22 100.0%	13 100.0%	301 100.0%

		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
Are any of the following affecting/impacting on your profitability?	Cost of rent	71	35	21	24	151	141	10	151
		49.3%	57.4%	41.2%	53.3%	50.2%	50.4%	47.6%	50.2%
	Local economy	48	25	28	24	125	116	9	125
		33.3%	41.0%	54.9%	53.3%	41.5%	41.4%	42.9%	41.5%
	Cost of labour	52	25	20	23	120	104	16	120
		36.1%	41.0%	39.2%	51.1%	39.9%	37.1%	76.2%	39.9%
	Lack of sales	54	25	23	17	119	114	5	119
		37.5%	41.0%	45.1%	37.8%	39.5%	40.7%	23.8%	39.5%
	Cost of power	45	16	17	24	102	92	10	102
		31.3%	26.2%	33.3%	53.3%	33.9%	32.9%	47.6%	33.9%
	Competition - online	40	22	16	19	97	90	7	97
		27.8%	36.1%	31.4%	42.2%	32.2%	32.1%	33.3%	32.2%
	Low margins	39	17	21	19	96	89	7	96
		27.1%	27.9%	41.2%	42.2%	31.9%	31.8%	33.3%	31.9%
	Weather	32	21	12	11	76	69	7	76
		22.2%	34.4%	23.5%	24.4%	25.2%	24.6%	33.3%	25.2%
	Competition - bricks and mortar	17	9	11	13	50	45	5	50
		11.8%	14.8%	21.6%	28.9%	16.6%	16.1%	23.8%	16.6%
	Lack of tourists	16	9	7	5	37	35	2	37
		11.1%	14.8%	13.7%	11.1%	12.3%	12.5%	9.5%	12.3%
	Other	13	5	2	3	23	21	2	23
		9.0%	8.2%	3.9%	6.7%	7.6%	7.5%	9.5%	7.6%
Total		144	61	51	45	301	280	21	301
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

What is your annual turnover range?									
		\$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
Are any of the following affecting/impacting on your profitability?	Cost of rent	62	33	12	14	1	0	0	29
		45.9%	61.1%	46.2%	77.8%	50.0%	.0%	.0%	50.2%
	Local economy	47	29	11	8	2	2	0	26
		34.8%	53.7%	42.3%	44.4%	100.0%	66.7%	.0%	41.5%
	Cost of labour	37	29	18	11	2	0	0	23
		27.4%	53.7%	69.2%	61.1%	100.0%	.0%	.0%	39.9%
	Lack of sales	60	23	9	6	0	1	0	20
		44.4%	42.6%	34.6%	33.3%	.0%	33.3%	.0%	39.5%
	Cost of power	43	21	10	8	1	1	0	18
		31.9%	38.9%	38.5%	44.4%	50.0%	33.3%	.0%	33.9%
	Competition - online	38	20	10	11	1	0	0	17
		28.1%	37.0%	38.5%	61.1%	50.0%	.0%	.0%	32.2%
	Low margins	40	23	7	10	1	1	0	14
		29.6%	42.6%	26.9%	55.6%	50.0%	33.3%	.0%	31.9%
	Weather	24	15	4	5	0	1	0	27
		17.8%	27.8%	15.4%	27.8%	.0%	33.3%	.0%	25.2%
	Competition - bricks and mortar	18	17	8	4	0	1	0	2
		13.3%	31.5%	30.8%	22.2%	.0%	33.3%	.0%	16.6%
	Lack of tourists	15	7	2	2	0	0	0	11
		11.1%	13.0%	7.7%	11.1%	.0%	.0%	.0%	12.3%
	Other	14	2	1	0	0	1	0	5
		10.4%	3.7%	3.8%	.0%	.0%	33.3%	.0%	7.6%
	Total	135	54	26	18	2	3	0	63
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%

Are any of the following affecting/impacting on your profitability?												
	Cost of rent	Local economy	Cost of labour	Lack of sales	Cost of power	Competition - online	Low margins	Weather	Competition - bricks and mortar	Lack of tourists	Other	Total
What industry sector do you fall into?												
Accommodation & Food Services	35 63.6%	28 50.9%	34 61.8%	23 41.8%	25 45.5%	13 23.6%	21 38.2%	31 56.4%	13 23.6%	15 27.3%	5 9.1%	55 100.0%
Administrative & Support Services	2 28.6%	4 57.1%	2 28.6%	2 28.6%	2 28.6%	2 28.6%	2 28.6%	0 .0%	1 14.3%	0 .0%	0 .0%	7 100.0%
Arts & Recreation Services	8 57.1%	4 28.6%	4 28.6%	9 64.3%	6 42.9%	5 35.7%	5 35.7%	2 14.3%	2 14.3%	0 .0%	1 7.1%	14 100.0%
Construction	5 33.3%	5 33.3%	6 40.0%	5 33.3%	3 20.0%	3 20.0%	7 46.7%	1 6.7%	2 13.3%	0 .0%	0 .0%	15 100.0%
Education & Training	1 9.1%	0 .0%	4 36.4%	3 27.3%	3 27.3%	3 27.3%	3 27.3%	0 .0%	1 9.1%	0 .0%	2 18.2%	11 100.0%
Electricity, Gas, Water & Waste Services	1 33.3%	0 .0%	2 66.7%	2 66.7%	1 33.3%	1 33.3%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	3 100.0%
Financial & Insurance Services	4 50.0%	4 50.0%	5 62.5%	1 12.5%	4 50.0%	1 12.5%	3 37.5%	0 .0%	0 .0%	0 .0%	1 12.5%	8 100.0%
Health Care & Social Assistance	9 42.9%	9 42.9%	7 33.3%	5 23.8%	7 33.3%	4 19.0%	4 19.0%	0 .0%	6 28.6%	1 4.8%	2 9.5%	21 100.0%
Information Media & Telecommunications	1 20.0%	1 20.0%	2 40.0%	1 20.0%	0 .0%	1 20.0%	2 40.0%	0 .0%	1 20.0%	0 .0%	1 20.0%	5 100.0%
Manufacturing	8 61.5%	6 46.2%	7 53.8%	5 38.5%	7 53.8%	4 30.8%	4 30.8%	1 7.7%	1 7.7%	0 .0%	0 .0%	13 100.0%
Professional, Scientific & Technical Services	6 40.0%	4 26.7%	4 26.7%	6 40.0%	2 13.3%	3 20.0%	4 26.7%	0 .0%	2 13.3%	0 .0%	3 20.0%	15 100.0%
Public Administration & Safety	0 .0%	0 .0%	0 .0%	0 .0%	1 50.0%	0 .0%	0 .0%	0 .0%	0 .0%	0 .0%	1 50.0%	2 100.0%
Rental, Hiring & Real Estate Services	2 40.0%	4 80.0%	0 .0%	1 20.0%	3 60.0%	2 40.0%	1 20.0%	0 .0%	0 .0%	0 .0%	1 20.0%	5 100.0%
Retail Trade	54 60.0%	47 52.2%	30 33.3%	42 46.7%	29 32.2%	44 48.9%	31 34.4%	33 36.7%	13 14.4%	16 17.8%	2 2.2%	90 100.0%
Transport, Postal & Warehousing	2 40.0%	2 40.0%	1 20.0%	3 60.0%	2 40.0%	3 60.0%	2 40.0%	0 .0%	1 20.0%	2 40.0%	0 .0%	5 100.0%
Wholesale Trade	2 66.7%	1 33.3%	1 33.3%	1 33.3%	1 33.3%	0 .0%	2 66.7%	1 33.3%	1 33.3%	1 33.3%	0 .0%	3 100.0%
Other Services (please specify)	11 37.9%	6 20.7%	11 37.9%	10 34.5%	6 20.7%	8 27.6%	5 17.2%	7 24.1%	6 20.7%	2 6.9%	4 13.8%	29 100.0%
Total	151 50.2%	125 41.5%	120 39.9%	119 39.5%	102 33.9%	97 32.2%	96 31.9%	76 25.2%	50 16.6%	37 12.3%	23 7.6%	301 100.0%

## Q20. Have you done any business with Council in the last 12 months?

		In which suburb is your business located?					
		Glenelg (including Glenelg East, Glenelg South and Glenelg North)	Somerton Park	Brighton (including Brighton North, Brighton South)	Hove	Seacliff	Total
Have you done any business with Council in the last 12 months?	Yes (please specify)	27	14	7	3	0	51
		15.3%	29.8%	16.3%	13.6%	.0%	16.9%
	No	149	33	36	19	13	250
		84.7%	70.2%	83.7%	86.4%	100.0%	83.1%
Total		176	47	43	22	13	301
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

		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 (please specify)	24	13	6	8	51	42	9	51
		16.7%	21.3%	11.8%	17.8%	16.9%	15.0%	42.9%	16.9%
	No	120	48	45	37	250	238	12	250
		83.3%	78.7%	88.2%	82.2%	83.1%	85.0%	57.1%	83.1%
Total		144	61	51	45	301	280	21	301
		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
Have you done any business with Council in the last 12 months?	Yes (please specify)	20	8	9	6	0	2	0	6
		14.8%	14.8%	34.6%	33.3%	.0%	66.7%	.0%	9.5%
	No	115	46	17	12	2	1	0	57
		85.2%	85.2%	65.4%	66.7%	100.0%	33.3%	.0%	90.5%
Total		135	54	26	18	2	3	0	63
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	.0%	100.0%

Have you done any business with Council in the last 12 months?			
What industry sector do you fall into?	Yes (please specify)		
	Yes (please specify)	No	Total
Accommodation & Food Services	11 20.0%	44 80.0%	55 100.0%
Administrative & Support Services	0 .0%	7 100.0%	7 100.0%
Arts & Recreation Services	4 28.6%	10 71.4%	14 100.0%
Construction	5 33.3%	10 66.7%	15 100.0%
Education & Training	2 18.2%	9 81.8%	11 100.0%
Electricity, Gas, Water & Waste Services	0 .0%	3 100.0%	3 100.0%
Financial & Insurance Services	0 .0%	8 100.0%	8 100.0%
Health Care & Social Assistance	4 19.0%	17 81.0%	21 100.0%
Information Media & Telecommunications	0 .0%	5 100.0%	5 100.0%
Manufacturing	3 23.1%	10 76.9%	13 100.0%
Professional, Scientific & Technical Services	5 33.3%	10 66.7%	15 100.0%
Public Administration & Safety	0 .0%	2 100.0%	2 100.0%
Rental, Hiring & Real Estate Services	2 40.0%	3 60.0%	5 100.0%
Retail Trade	12 13.3%	78 86.7%	90 100.0%
Transport, Postal & Warehousing	0 .0%	5 100.0%	5 100.0%
Wholesale Trade	0 .0%	3 100.0%	3 100.0%
Other Services (please specify)	3 10.3%	26 89.7%	29 100.0%
Total	51 16.9%	250 83.1%	301 100.0%

**Q21. 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?**

Interaction with Business Development	5.31
Interaction Jetty Road (Glenelg) Coordination	5.19
Delivery of planning and building permits	5.18
Town Planning initiatives that plan for future growth	4.82
Delivery of food safety & health inspections	5.96
Delivery of traffic management and parking	4.28
Delivery of footpath trading management	4.97
Delivery of local laws/enforcement	5.15
Maintaining shopping precincts	5.50
Facilitation of major events, cultural festival and attractions	6.05
Waste and environmental management	5.87

		Interaction with	Interaction Jetty	Delivery of	Town Planning	Delivery of food	Delivery of	Delivery of	Delivery of local	Maintaining	Facilitation of	Waste and
In which suburb is your	Glenelg (including Glenelg East, Glenelg South and Glenelg North)	4.92	5.17	4.87	4.84	5.79	4.24	4.93	5.18	5.22	6.02	5.83
	Somerton Park	6.17	5.40	5.24	4.53	5.79	5.00	5.00	5.33	6.04	6.27	6.08
	Brighton (including Brighton North, Brighton South)	6.33	6.33	7.20	5.75	7.22	2.59	4.58	5.40	5.92	5.94	5.58
	Hove	5.83	4.33	6.40	5.80	7.20	5.55	5.90	5.29	6.54	6.15	6.71
	Seacliff	6.00	4.00	1.00	1.67	5.00	4.67	4.00	2.00	5.33	5.80	5.00
Number of years	0-5 years	5.20	5.73	5.21	5.29	6.21	4.60	5.04	5.35	5.79	5.93	6.04
	6-10 years	5.87	4.93	5.46	4.63	6.00	3.79	4.76	4.70	5.34	5.85	6.05
	11-20 years	5.38	5.50	5.06	4.35	6.00	4.76	5.62	5.67	5.94	6.69	5.73
	Over 20 years	4.79	3.83	4.84	4.43	5.18	3.56	4.32	4.53	4.21	5.93	5.25
Size of	Small <20 employees	5.26	5.18	5.11	4.75	6.07	4.25	4.93	4.94	5.49	6.02	5.86
	Medium 20-199 employees	5.75	5.25	5.64	5.27	5.27	4.61	5.29	6.87	5.56	6.35	6.00
What is your	<\$500k	5.27	5.30	5.08	5.05	6.02	4.78	5.25	5.10	5.89	5.94	6.21
	\$500k-\$1 million	5.00	5.19	4.83	4.33	5.68	3.67	4.08	4.68	4.90	6.13	5.79
	\$1 million - \$2 million	5.89	5.35	6.35	5.67	6.40	5.64	5.81	6.67	6.32	7.62	6.86
	\$2 million-\$5 million	5.17	5.50	4.88	4.14	4.75	3.69	4.85	5.56	6.36	5.92	5.83



	Interaction with	Interaction Jetty	Delivery of	Town Planning	Delivery of food	Delivery of	Delivery of	Delivery of local	Maintaining	Facilitation of	Waste and
\$5 million-\$10 million	7.00	7.00	2.00	4.00	.	5.00	5.00	9.00	5.00	5.50	8.00
\$10 million-\$50 million	10.00	4.00	8.00	8.00	4.00	.00	4.00	4.00	2.00	6.50	4.00
\$50 million+	.	.	.	.	.	.	.	.	.	.	.
Prefer not to say	5.16	4.79	4.75	4.27	6.29	3.29	4.70	4.56	4.55	5.40	4.78
Accommodation & Food Services	4.61	5.19	4.91	4.61	6.43	4.19	4.77	5.43	5.62	5.57	5.40
Administrative & Support Services	.	7.00	.	1.00	.	.00	.	.00	5.00	8.00	7.00
Arts & Recreation Services	5.00	4.00	4.80	5.00	6.00	3.75	3.80	4.67	4.86	4.50	5.60
Construction	5.50	5.13	5.40	5.71	5.50	4.43	3.71	4.63	5.36	5.11	4.67
Education & Training	7.67	.00	9.50	7.67	9.00	7.60	9.50	7.75	8.00	9.00	8.88
Electricity, Gas, Water & Waste Services	.	.	.	.	9.00	8.00	8.00	.	8.50	8.00	9.50
Financial & Insurance Services	7.00	6.67	4.00	.00	7.00	1.83	2.20	4.50	3.20	5.00	6.20
Health Care & Social Assistance	5.14	4.60	6.33	4.00	5.50	4.33	5.00	4.50	6.78	7.36	6.75
Information Media & Telecommunications	.00	.	.	.00	10.00	10.00	10.00	10.00	10.00	10.00	10.00
Manufacturing	4.71	3.33	4.00	2.83	3.60	4.67	4.83	3.71	4.14	4.43	5.25
Professional, Scientific & Technical Services	7.50	7.50	6.00	6.75	7.00	5.14	5.29	6.40	7.00	7.50	6.30
Public Administration & Safety	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Rental, Hiring & Real Estate Services	6.00	3.50	6.00	6.00	4.00	1.00	4.00	4.00	3.50	7.50	6.00
Retail Trade	5.64	5.57	5.24	5.27	5.54	4.09	5.16	5.37	5.30	6.26	5.91
Transport, Postal & Warehousing	8.00	.	.	2.00	.	4.60	4.00	2.67	5.33	5.75	6.00
Wholesale Trade	6.50	7.50	7.00	7.00	7.00	3.50	7.00	7.00	7.00	7.00	5.50
Other Services (please specify)	6.00	5.00	5.29	4.67	5.33	5.33	5.89	4.89	5.22	6.36	4.91
Total	5.31	5.19	5.18	4.82	5.96	4.28	4.97	5.15	5.50	6.05	5.87

What industry sector do you fall into?

	0	1	2	3	4	5	6	7	8	9	10	Total
	Poor										Excellent	
Interaction with Business Development	10	8	7	6	11	33	18	17	17	3	11	141
	7.1%	5.7%	5.0%	4.3%	7.8%	23.4%	12.8%	12.1%	12.1%	2.1%	7.8%	100.0%
Interaction Jetty Road (Glenelg)	15	7	6	9	10	19	15	14	22	5	9	131
Coordination	11.5%	5.3%	4.6%	6.9%	7.6%	14.5%	11.5%	10.7%	16.8%	3.8%	6.9%	100.0%
Delivery of planning and building permits	7	7	7	7	7	24	19	8	7	7	8	108
	6.5%	6.5%	6.5%	6.5%	6.5%	22.2%	17.6%	7.4%	6.5%	6.5%	7.4%	100.0%
Town Planning initiatives that plan for future growth	12	8	9	5	9	23	18	12	11	3	6	116
	10.3%	6.9%	7.8%	4.3%	7.8%	19.8%	15.5%	10.3%	9.5%	2.6%	5.2%	100.0%
Delivery of food safety & health inspections	9	2	2	5	8	20	13	18	11	9	13	110
	8.2%	1.8%	1.8%	4.5%	7.3%	18.2%	11.8%	16.4%	10.0%	8.2%	11.8%	100.0%
Delivery of traffic management and parking	28	18	18	12	4	25	22	12	13	14	6	172
	16.3%	10.5%	10.5%	7.0%	2.3%	14.5%	12.8%	7.0%	7.6%	8.1%	3.5%	100.0%
Delivery of footpath trading management	18	7	10	8	9	33	24	10	12	16	5	152
	11.8%	4.6%	6.6%	5.3%	5.9%	21.7%	15.8%	6.6%	7.9%	10.5%	3.3%	100.0%
Delivery of local laws/enforcement	19	8	5	5	6	24	24	15	12	11	9	138
	13.8%	5.8%	3.6%	3.6%	4.3%	17.4%	17.4%	10.9%	8.7%	8.0%	6.5%	100.0%
Maintaining shopping precincts	12	8	11	5	11	29	24	18	25	12	9	164
	7.3%	4.9%	6.7%	3.0%	6.7%	17.7%	14.6%	11.0%	15.2%	7.3%	5.5%	100.0%
Facilitation of major events, cultural festival and attractions	12	4	12	3	12	21	26	19	32	16	18	175
	6.9%	2.3%	6.9%	1.7%	6.9%	12.0%	14.9%	10.9%	18.3%	9.1%	10.3%	100.0%
Waste and environmental management	16	3	9	3	14	32	29	21	30	13	18	188
	8.5%	1.6%	4.8%	1.6%	7.4%	17.0%	15.4%	11.2%	16.0%	6.9%	9.6%	100.0%

**Q22. 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?**

Small Business Grants	4.59
Shopfront Grants	4.72
Digital Training	4.31
Business Training	4.16
Small Business Mentoring Program	4.12
Jetty Road (awards)	4.73
Mainstreet awards	
Business communication	4.49
Access to information on government funding and programs for business	3.98
Vibrancy of business centres	4.30
Data that supports business growth	3.93

		Small Business Grants	Shopfront Grants	Digital Training	Business Training	Small Business Mentoring	Jetty Road (awards)	Mainstreet	Business communication	Access to information on government	Vibrancy of business centres	Data that supports
	Glenelg (including Glenelg East, Glenelg South and Glenelg North)	4.70	5.02	4.46	4.41	4.22	4.84	4.68	4.24	4.17	3.99	
	Somerton Park	4.52	3.61	3.91	3.18	3.86	4.53	4.75	3.64	4.33	4.04	
	Brighton (including Brighton North, Brighton South)	4.11	3.93	4.69	4.69	4.50	4.20	4.00	3.33	4.88	3.71	
	Hove	5.13	5.00	3.40	3.67	3.67	4.57	3.64	4.50	4.60	4.18	
In which	Seacliff	2.67	.	.	1.50	2.33	3.00	2.20	1.25	5.00	1.75	
Number	0-5 years	4.79	4.68	4.52	4.30	4.28	5.04	4.77	4.30	4.83	4.36	
	6-10 years	4.75	5.08	4.71	4.41	4.24	4.18	4.46	3.81	3.78	3.79	
	11-20 years	4.39	4.80	4.27	4.46	4.24	5.19	5.10	4.41	4.55	4.41	
	Over 20 years	4.00	4.28	3.10	3.05	3.42	3.81	3.13	2.81	2.84	2.50	
Siz	Small <20 employees	4.54	4.69	4.28	4.13	4.11	4.74	4.46	3.89	4.25	3.86	
	Medium 20-199 employees	5.08	5.08	4.62	4.38	4.23	4.67	4.73	4.93	4.73	4.53	
	<\$500k	4.49	4.47	4.31	4.08	4.13	4.52	4.76	3.93	4.83	4.00	
	\$500k-\$1 million	4.62	4.93	4.19	4.30	4.15	4.89	4.52	4.39	3.90	3.82	
	\$1 million - \$2 million	5.94	5.87	4.18	3.72	4.44	5.71	4.29	4.00	4.28	3.81	
	\$2 million-\$5 million	3.57	4.13	4.33	4.13	3.38	5.27	4.58	3.70	3.73	3.91	
	\$5 million-\$10 million	3.00	1.00	1.00	1.00	1.00	1.00	3.00	1.00	4.00	4.00	
	\$10 million-\$50 million	6.00	6.00	6.00	6.00	6.00	5.00	4.00	5.00	4.00	3.00	
	\$50 million+	.	.	.	.	.	.	.	.	.	.	
What is your annual	Prefer not to say	4.18	4.69	4.58	4.54	4.13	4.50	4.00	3.88	3.71	3.93	
	Accommodation & Food Services	4.71	4.91	4.26	3.97	3.82	4.56	4.21	3.83	4.21	3.74	
	Administrative & Support Services	6.50	.	2.00	.	5.00	3.00	4.00	2.00	7.00	.	
	Arts & Recreation Services	5.89	5.14	3.33	3.50	5.17	5.75	4.60	4.25	5.25	5.38	
	Construction	3.22	3.29	3.38	3.00	3.13	4.78	3.44	3.18	3.73	3.50	
	Education & Training	7.00	7.50	5.60	5.60	5.40	8.00	4.75	4.20	7.00	4.50	
	Electricity, Gas, Water & Waste Services	6.50	6.50	6.50	6.50	6.50	10.00	8.50	10.00	10.00	7.50	
	Financial & Insurance Services	2.25	.50	2.25	2.25	.67	3.60	2.50	.50	2.25	.67	
	Health Care & Social Assistance	4.00	3.40	4.17	4.17	4.00	3.50	4.43	4.00	2.38	3.37	
	Information Media & Telecommunications	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	
	Manufacturing	5.50	4.67	3.83	3.57	4.29	3.29	4.90	4.33	5.00	4.33	
	Professional, Scientific & Technical Services	3.00	4.20	4.40	4.33	3.83	3.75	5.44	3.33	5.78	5.33	
	Public Administration & Safety	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	
	Rental, Hiring & Real Estate Services	6.00	6.00	6.00	6.00	6.00	3.50	4.00	3.50	3.00	2.50	
	Retail Trade	4.53	4.96	5.00	4.71	4.53	5.10	4.84	4.78	4.09	4.06	
	Transport, Postal & Warehousing	2.00	2.00	2.00	2.00	2.00	7.00	2.50	2.00	4.75	2.50	
	Wholesale Trade	5.00	5.00	5.00	5.00	4.00	5.00	5.00	5.00	5.00	5.00	
	Other Services (please specify)	5.00	6.40	3.90	4.08	4.09	5.25	4.54	3.36	4.82	3.31	
What industry sector do you fall into?	Total	4.59	4.72	4.31	4.16	4.12	4.73	4.49	3.98	4.30	3.93	

	0 Totally dissatisfied	1	2	3	4	5	6	7	8	9	10 Totally satisfied	Total
Small Business Grants	21 13.8%	9 5.9%	13 8.6%	9 5.9%	14 9.2%	26 17.1%	22 14.5%	9 5.9%	15 9.9%	6 3.9%	8 5.3%	152 100.0%
Shopfront Grants	21 15.4%	8 5.9%	7 5.1%	10 7.4%	10 7.4%	21 15.4%	21 15.4%	9 6.6%	14 10.3%	6 4.4%	9 6.6%	136 100.0%
Digital Training	22 16.2%	8 5.9%	7 5.1%	15 11.0%	12 8.8%	25 18.4%	20 14.7%	10 7.4%	6 4.4%	2 1.5%	9 6.6%	136 100.0%
Business Training	22 15.6%	11 7.8%	11 7.8%	12 8.5%	12 8.5%	26 18.4%	22 15.6%	11 7.8%	4 2.8%	2 1.4%	8 5.7%	141 100.0%
Small Business Mentoring Program	22 15.5%	13 9.2%	10 7.0%	9 6.3%	12 8.5%	31 21.8%	24 16.9%	6 4.2%	6 4.2%	2 1.4%	7 4.9%	142 100.0%
Jetty Road (awards) Mainstreet awards	25 16.7%	11 7.3%	5 3.3%	7 4.7%	9 6.0%	30 20.0%	20 13.3%	10 6.7%	17 11.3%	4 2.7%	12 8.0%	150 100.0%
Business communication	24 13.6%	15 8.5%	6 3.4%	19 10.7%	14 7.9%	32 18.1%	30 16.9%	8 4.5%	12 6.8%	8 4.5%	9 5.1%	177 100.0%
Access to information on government funding and programs for business	30 18.2%	17 10.3%	18 10.9%	11 6.7%	9 5.5%	27 16.4%	21 12.7%	9 5.5%	6 3.6%	7 4.2%	10 6.1%	165 100.0%
Vibrancy of business centres	30 17.4%	11 6.4%	16 9.3%	8 4.7%	16 9.3%	28 16.3%	23 13.4%	15 8.7%	11 6.4%	3 1.7%	11 6.4%	172 100.0%
Data that supports business growth	27 16.8%	18 11.2%	13 8.1%	16 9.9%	11 6.8%	24 14.9%	25 15.5%	8 5.0%	8 5.0%	4 2.5%	7 4.3%	161 100.0%

**Q23. Do you have any suggestions or ideas on what strategies the City of Holdfast Bay can implement to support better business conditions for you?**

**Q24. If you would like to be entered in the draw to win a shopping voucher valued at \$200 please provide your name and email address.**

## 6. Questionnaire

The City of Holdfast Bay has commissioned Intuito Market Research to conduct a study amongst businesses across the Council precinct. Your feedback is extremely valuable and will enable Council to assess the needs of the business community. This local business survey is conducted regularly and when answering the questions we encourage you to look back over the last 12 months and assess accordingly. The survey should be completed by a person of authority in your business (Owner, Manager, Senior Staff Member) and should only take around 5 minutes. To thank you for your time and views there is an opportunity at the end of the survey to enter a draw to win a shopping voucher valued at \$200. Entry details will be separated from responses to ensure respondent anonymity. If you have any questions related to the survey please contact Intuito Market Research on 8331 2228 during office hours or email [info@intuito.com.au](mailto:info@intuito.com.au).

Intuito Market Research abides by the AMSRS Privacy Code for Market and Social Research. All data gathered will be treated with the strictest confidentiality and will only be used for research purposes. Intuito is a member of the Australian Market & Social Research Society and works to the highest privacy standards. At no time do we ask you to identify yourself and therefore none of your answers can be attributed to you as an individual rather they are aggregated statistics only.

\* 1. In which suburb is your business located?

- ☐ Glenelg (including Glenelg East, Glenelg South and Glenelg North) ☐ Brighton (including Brighton North, Brighton South) ☐ Seacliff  
☐ Somerton Park ☐ Hove ☐ Kingston Park

\* 2. How long has your business operated in the City of Holdfast Bay Council area?

Number of whole years

\* 3. How many people (including management and owners) did your business employ in the current quarter (September, 2019)?

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

\* 4. 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

\* 5. What ratio of each of the following do you employ on a full time basis to the nearest 10 percent?

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

\* 6. Which of the following internet connections does your business currently use?

- ☐ NBN
- ☐ 5G
- ☐ Don't know/not sure
- ☐ Other (please specify)

\* 7. On a scale of 0 to 10, where 0 is totally dissatisfied and 10 is totally satisfied, how satisfied are you with the speed of your internet connection?

0 Totally dissatisfied	1	2	3	4	5	6	7	8	9	10 Totally satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 8. Does your business transact online?

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

\* 9. 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  
☐ No  
☐ Don't know/not sure

\* 10. 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?

	0 Totally unimportant	1	2	3	4	5	6	7	8	9	10 Totally important	N/A
Intrastate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interstate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



\* 11. How do you expect the following economies to perform over the next 12 months?

	Weaker	Slightly weaker	Same	Slightly stronger	Stronger
National economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
South Australian economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local council area economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 12. How would you describe the following business KPIs in the Q3 September quarter of 2019? Were they up, down or about the same as the previous quarter?

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



\* 13. How do you expect the same business KPIs to perform in Q4 of 2019? Will they be up, down or about the same as the previous quarter?

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

\* 14. Thinking about the next 12 months, how confident do you feel about your business prospects?

- ☐ Extremely confident
- ☐ Fairly confident
- ☐ Neutral
- ☐ Fairly worried
- ☐ Extremely worried

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\* 15. As far as business is concerned, what problems, if any, are you facing at the moment?

- ☐ 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)

\* 16. What are the barriers to taking on new employees?

- ☐ 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)

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\* 17. 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
- ☐ Other Services (please specify)

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18. Do you generally believe that profitability is declining in the retail sector at the moment?

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

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\* 19. Are any of the following affecting/impacting on your profitability? Choose all that apply.

- ☐ Cost of labour
- ☐ Cost of rent
- ☐ Lack of sales
- ☐ Low margins
- ☐ Competition - bricks and mortar
- ☐ Competition - online
- ☐ Weather
- ☐ Lack of tourists
- ☐ Cost of power
- ☐ Local economy
- ☐ Other (please specify)

\* 20. Have you done any business with Council in the last 12 months?

- ☐ No
- ☐ Yes (please specify)

\* 21. 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?

	0	1	2	3	4	5	6	7	8	9	10	
	Poor										Excellent	N/A
Interaction with Business Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interaction with Jetty Road (Glenelg) Coordination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery of planning and building permits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Town planning initiatives that plan for future growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery of food safety & health inspections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery of traffic management and parking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery of footpath trading management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery of local laws/enforcement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintaining shopping precincts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitation of major events, cultural festival and attractions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Waste and environmental management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 22. 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?

	0 Totally dissatisfied	1	2	3	4	5	6	7	8	9	10 Totally satisfied	N/A
Small Business Grants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopfront Grants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digital Training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business Training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Small Business Mentoring Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Jetty Road (awards) Mainstreet awards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to information on government funding and programs for business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vibrancy of business centres	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Data that supports business growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

\* 23. Do you have any suggestions or ideas on what strategies the City of Holdfast Bay can implement to support better business conditions for you?

Enter here for your chance to win a \$200 shopping voucher

24. If you would like to be entered in the draw to win a shopping voucher valued at \$200 please provide your name and email address

Name	<input type="text"/>
Email	<input type="text"/>