



Insight for
Business & Government

2017 Survey of Businesses in Camden, Campbelltown and Wollondilly

Summary of findings

Prepared for



Prepared by
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Executive Summary

This report presents the results of Wave 2 of the Macarthur Regional Organisation of Councils (MACROC) Business Survey for April 2017. IRIS Research was commissioned to conduct a comprehensive online and telephone-based survey among the businesses of the local government areas of Camden, Campbelltown and Wollondilly (MACROC). The survey sought a range of business attitudes and opinions as well measuring business conditions for the July to December 2016 period and the expectations for the January to June 2017 period.

The main findings of Wave 2 of the 2017 business survey are summarised under the key report headings.

Industries Surveyed

A good cross section of completed questionnaires from businesses throughout the MACROC Area was collected. In total there were 602 businesses that completed the questionnaire from a range of industries. Table E1 gives a breakdown of the industries that the businesses represent, as well as the classification they fall into for the purposes of this report. The collapsed classification system has been applied to allow for a broad industry sub analysis to be undertaken. The groupings are based on “best fit” and are standard groupings used by IRIS Research in a range of regional business surveys undertaken.

Businesses were further classified into small, medium and large, with the small business sector accounting for 85.2% of the completed questionnaires. Medium sized businesses made up 12.1% of completed questionnaires, while large businesses, those with 100 or more employees accounted for 2.7% of the sample.

Of the completed questionnaires, 34.1% were carried out by businesses that operate in the Campbelltown LGA while 35.5% operate in Camden LGA and 30.4% operate in the Wollondilly LGA.

Table E1: Industry classifications for this report

Industry classification	New classification for this report	% of sample
Accommodation, Cafés and Restaurants	Accommodation, Cafés and Restaurants / Arts and Recreation	8.3%
Arts & Recreation		
Construction	Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	9.3%
Electricity, Gas or Water supply		
Transport, Postal and Warehousing		
Wholesale Trade	Retail / Wholesale	22.3%
Retail Trade		
Manufacturing	Manufacturing	10.6%
Professional, Scientific & Technical Services	Professional / Education / Healthcare / Finance and Other Services	46.8%
Rental, Hiring & Real Estate Services		
Information, Media & Telecommunications		
Education and Training		
Finance and Insurance		
Administration and Support Services		
Not for profit / Social Enterprise		
Health and Social Assistance		
Other Services		
Agriculture	Agriculture	2.7%

Key report headings:

Time in Business:

- The vast majority of businesses surveyed (**84.5%**) **had been in business for more than five (5) years.**

Trading Conditions:

- **Almost half (48.6%)** of businesses reported trading conditions for the six months from July to December 2016 **as being 'good' (32.7%) or 'very good' (15.9%).** This is up from the 44.4% reported in 2014.
- Trading conditions for January through to June 2017 are expected to improve, with **53.0% of businesses of the view that trading conditions will be 'good' or 'very good'** over this period. Businesses are not as confident as they were in 2014 where 56.8% felt that trading conditions would be 'good' or 'very good'.
- More than **one in three businesses (34.1%) expected trading conditions to be satisfactory over the current period.**
- **Expectations for the current period** in 2017 are **less optimistic than they were in 2014.**
- More than **half of businesses in the 'Construction, transport and utilities', 'professional, finance, business, property, healthcare and other services' and 'professional, education, healthcare and other'** found **trading conditions to be good** during the July to December 2016 period.
- **Businesses in the 'Accommodation, food services, arts and recreation' (41.0%) and 'retail / wholesale' reported a significant drop in trading conditions** when compared to the 2014 result, with those reporting good trading conditions at **37.9%, down from 48% in 2014.**
- **'Manufacturing' businesses** reporting 'good' trading conditions on the other hand **have risen substantially from 31.0% in 2014 to 52.4% in 2016.**
- For **all but the 'manufacturing' sector,** expectations of trading conditions for the period January to June 2016 **were more positive than the actual performance from July to December 2016.**

- The **'Construction, transport, electricity, gas or water'** sector is most **confident** about the current period with **60.7% forecasting 'good' trading conditions**.
- When compared with the expected trading conditions for July to December 2014, 'Accommodation, cafes and restaurants' (42.4% down from 62%) and 'Professional, education, healthcare, finance and other' (54.3% down from 61%) have recorded the biggest drops in 'good' rating.
- On the other hand **'Construction, transport and utilities' (60.7% up from 51%) and 'Manufacturing' (49.2% up from 36%)** have recorded **significant rises in expected trading conditions since** the July to December **2014** measure.
- Overall the MACROC economy is performing strongly with net response of businesses indicating improving trading conditions. Trading activity was found to be **strongest in the 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' (47) sector**.
- Businesses **Camden and Campbelltown** reported that **trading conditions in 2017 were better than they were in 2014**. Wollondilly businesses reported no change.
- **Expectations across the regional economy for the current period (January to June 2017) are extremely positive across all sectors.**

Table E2: Net Scores - Trading conditions

	Jan – Jun 2014 Net Score	July – Dec 2014 Net Score	July - Dec 2016 Net Score	Jan-Jun 2017 Net Score	Improve (+) or Worsen (-)
Overall	27	45	34	40	+6
Accommodation, Cafés and Restaurants / Arts and Recreation	38	48	24	21	-3
Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	35	35	47	46	-1
Retail / Wholesale	19	44	31	41	+10
Manufacturing	-2	21	35	37	+2
Professional / Education / Healthcare / Finance and Other Services	33	50	35	44	+9
Agriculture	25	25	0	0	0

Profitability:

- Around one in three businesses (**35.3%**) indicated that their **profitability was favourable**, that is 'good' (26.7%) or 'very good' (8.6%) over the six months from July to December 2016. This is on par with the 2014 result of 32.8%.
- A further **two in five businesses** (42.5%) **felt their profitability was satisfactory**, similar to the 2014 result of 41.4%.
- **Profitability** for the period January to June 2017 **is expected to improve marginally**, with nearly two in five businesses (38.7%) indicating profitability would be 'good' (29.1%) or 'very good' (9.6%) over this period. This result is down from the 43.5% of businesses that expected 'good' trading conditions in 2014.
- **Businesses reported a higher level of profitability when compared to 2014 but were less optimistic about prospects for the current period.**
- **All sectors reported similar profitability results** for the July to December, 2016 period with the exception of the 'Accommodation, Cafés and Restaurants / Arts and Recreation' sector where only 21.2% of businesses indicated 'good' profitability.
- With the **exception of 'Manufacturing'** (33.3% down from 38.1%) and 'Retail/Wholesale' (unchanged), **all sectors recorded moderate rises in business's expectations for profitability for the January to June 2017 period.**
- **Camden LGA had the most businesses experiencing 'good' profitability (38.8%).**
- Businesses in the **Camden LGA** reported in **rise profitability for the July to December 2016 period when compared to 2014.**
- In a result on par with the 2014 result (33.1%), **one in three businesses (34.1%) in the Campbelltown LGA** recorded a rating in the 'good' range.

- **Camden (42.1%) and Campbelltown (39.5%) businesses were the most optimistic about a good profit result** for the January to June 2017 period, while businesses in the Wollondilly region were significantly less upbeat, with one in three (33.9%) expecting a good profit result.

Table E3: Net Scores - Profitability

	Jan – Jun 2014 Net Score	July – Dec 2014 Net Score	July – Dec 2016 Net Score	Jan – Jun 2017 Net Score	Improve (+) or Worsened (-)
Overall	7	27	13	21	+8
Accommodation, Cafés and Restaurants / Arts and Recreation	18	38	-3	0	+3
Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	8	16	21	23	+2
Retail / Wholesale	2	27	17	21	+4
Manufacturing	-15	10	11	14	+3
Professional / Education / Healthcare / Finance and Other Services	12	31	15	27	+12
Agriculture	-25	0	0	0	0

Capital Expenditure

- A total of **46.8%** of businesses indicated they made “**at least some**” **capital expenditure** in the six months from July to December 2016. This is **up substantially** from the 34.0% of businesses that reported ‘at least some’ capital expenditure in **2014**.
- The **capital expenditure is expected to hold up in the January to June 2017 period**, with 47.8% of businesses indicating ‘at least some’ capital expenditure.
- **Both reported and expected capital expenditure is up when compared to 2014.**

Amount of Overtime

- During the six months to December 2016, more than a third of businesses **(35.5%)** indicated they were busy enough to have **'at least some' overtime work available** for employees. This is a substantial increase from the 24.1% reporting it in 2014.
- Overtime is expected to remain on par for the six months to June 2017.
- **Both the reported and expected overtime are higher in this round of reporting than they were in the comparable periods in 2014.**
- Businesses in the **'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water'** sector reported having the most overtime **available** ('A fair amount' and 'Substantial') in the six months to December 2017 at 35.7%.
- Half of the businesses in the **'Accommodation, Cafés and Restaurants / Arts & Recreation'** (47.0%), and the **'Professional, Education, Health Care, Finance and Other'** (50.0%) indicated they expect to have no overtime available for the period January to June 2017.
- **Expectations are highest for the 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' (28.5%) and the 'Manufacturing' (23.8%) sectors** ('A fair amount' and 'Substantial') for the six months to June 2017.
- **Businesses in Camden, Campbelltown and Wollondilly areas all reported higher levels of overtime when compared to 2014.**

Employment Levels

- **15.1% of businesses experienced higher staffing levels** in the six months from July to December 2016. Seven in ten businesses (72.6%) registered no change in staffing levels. Comparatively 11.7% indicated that staffing levels were lower. The numbers are on par with the 2014 results.
- Overall, **19.0% of businesses are expecting staffing levels to be higher or much higher** during the current January to June 2017 period while seven in ten expect staffing levels to remain unchanged.
- **There is no statistically significant difference in either reported or expected staffing levels when compared to 2014.**

Table E4: Net Scores – Staffing

	Jan – June 2014 Net Score	July – Dec 2014 Net Score	July – Dec 2016 Net Score	Jan - Jun 2017 Net Score	Improve (+) or Worsened (-)
Overall	5	14	4	11	+7
Accommodation, Cafés and Restaurants / Arts and Recreation	3	11	-9	3	+12
Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	-3	11	2	18	+16
Retail / Wholesale	2	5	3	7	+4
Manufacturing	0	10	13	19	+6
Professional / Education / Healthcare / Finance and Other Services	9	15	7	10	+3
Agriculture	-50	50	6	12	+6

Business Objective

- Results showed that **45.8% (42.7% in 2014) of businesses chose 'grow moderately'** as the option that best describes their business objectives during the past six months.
- **Fewer businesses (40.7%)** chose the option of '**remain about the same size**' while 5.0% chose the option of 'grow rapidly'.
- **These results are statistically unchanged from 2014.**

Expansion

- When businesses were asked whether they are **considering expansion** in the next two (2) years, over four in ten (**41.5%**) indicated that they are. This is statistically on par with the 37.9% of businesses that indicated that they were in 2014.
- When asked what **activities businesses have planned for expansion**, almost three in five businesses (57.3%) chose '**Increasing marketing and advertising**'.
- **Almost as many** businesses (56.9%) indicated '**Increasing staff**' as an option for expansion planning. **This was the top option in 2014.**
- In **2014** the top activities mentioned were '**Increasing staff**', '**Increasing marketing and advertising**' and '**Introducing new technologies**'.

Factors Affecting Future Growth

- **'Access to fast broadband services'** has been identified as being a major concern by 25.7% of respondents. Closer examination would probably identify those businesses as ones without access to fast broadband. This highlights just how **significant this essential service is to regional business**.
- **'The Economy'** was highlighted as being the main factor influencing the **future growth** of businesses with almost a quarter of businesses (24.5%) stating they were 'extremely concerned'. This is on par with the 2014 result.
- **'Energy costs' (24.1%), 'Rising overheads' (21.9%) and 'Price pressures from competitors' (19.1%)** were also mentioned as issues of major concern. These all featured highly in 2014.

Council Initiatives

- When businesses were asked which Council initiatives would most support their business, the **most popular response** at 56.1% was 'Improving local roads'.
- Almost as popular was to **'Provide more opportunities to listen to local business needs and issues'** at 47.3% followed by **'Improving the skills and employability of local people'** at 40.49%.
- **These three were also the most popular options in 2014.**

Promotion and Marketing

- When businesses were asked what methods they use to promote or market their business, more than **four in five businesses (82.1%) indicated 'word of mouth'**.
- The three (3) most popular methods after 'word of mouth' included **'Website' (69.1%), Social media (57.6%) and 'Networking' (51.5%)**.
- **These were also the most frequently mentioned in 2014.**

Staff Recruitment

- When businesses were asked how they **normally recruit staff** the most popular answer at 55.5% was **'word of mouth'**.
- **One in three** businesses (43.2%) selected the option of **'Advertise online'** while just under **one in four** businesses (23.3%) chose **'advertise in local newspaper'**.
- **Respondents to the 2014 survey listed the same methods, in the same order, as being their preferred methods of recruitment.**

Sought After Occupations

- Businesses were asked what occupations they are looking for if they were to employ new staff in the future. **One in four** businesses (23.3%) selected **'Tradespersons'** while **21.1%** selected **'Sales persons'**.
- **'Clerical admin' staff** were the third most popular at **19.8%** followed by **'Professionals' (19.4%)** and **'Apprentice / Trainee' (19.1%)**.
- **The same occupations were identified in the 2014 survey and each is statistically equivalent to their 2017 result.**

Information to Improve the Performance of Your Business

- When businesses were asked to choose from a number of areas in which they would like more information to improve the performance of their business **three in four** (48.0%) selected **'Marketing and promotion'**. **This also rated top in 2014.**
- The proportion of businesses who selected **'Business development'** and **'Business networking and collaboration'** returned similar results at **35.7%** and **33.4%** respectively.
- **One in five** businesses (19.3%) selected **'Research and development grants'** while **19.1%** of business selected **'Risk management (WHS)'**.
- **The same key areas were identified in the 2014 survey.**

Introduction

Background

This is the second bi-annual business survey conducted for the MACROC area by IRIS Research. This survey was conducted online and was open to all businesses in the MACROC area.

Study Objectives

The broad objectives for the business survey were to:

- Understand business conditions in the July to December 2016 period for businesses of MACROC and compare that data against the expectations for the January to June 2017 business period;
- To enable MACROC to track the business climate overtime
- Identify ways that MACROC can assist business growth and success in the region
- Gain a better understanding of the business landscape locally

Sample Response

An online survey was used as the method to secure a response from 602 businesses from throughout the MACROC area. Email addresses were obtained from a purchased business database of the area, from Council contacts and topped up by calling businesses listed in the yellow pages and requesting their participation and contact details.

Data Collection

The survey period was from February 20, 2017 through to April 5, 2017. At the end of the survey period, 602 completed interviews were collected from businesses across the MACROC Area.

Comparison with the 2014 Business Survey

The same business survey was run between July and September 2014. The survey was identical but the 2014 survey was run using a combination of online and telephone surveys for a total of 443 surveys. All 602 surveys collected in 2017, were collected online.

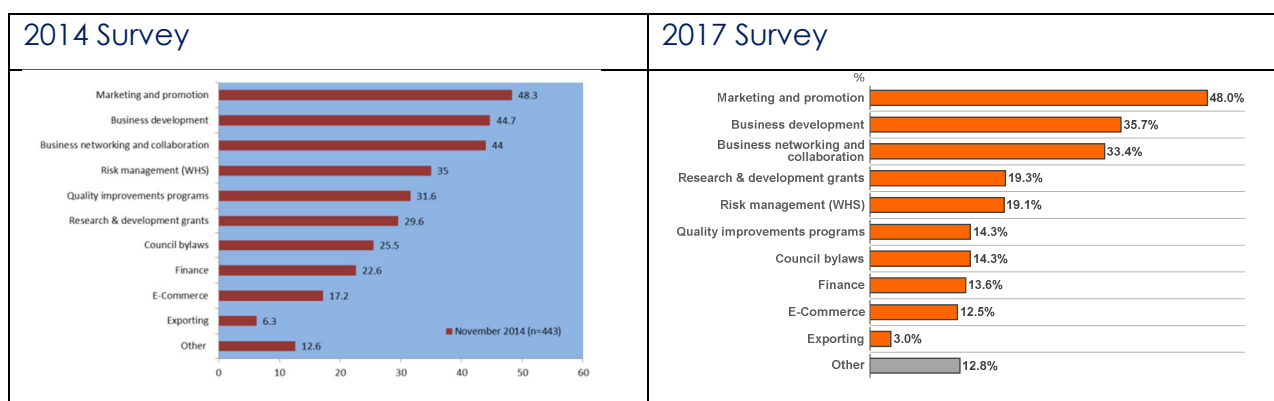
Telephone surveying has some advantages over online surveys. With a telephone survey the sample frame can be controlled and the potential errors in the data set can be accurately estimated. With an online survey, participation is self-selecting and there is no control over the representativeness of the final collected sample. This means in effect that estimates of potential errors in the data need to be more conservative.

In particular the business profile information presented in chapter 2 of this report does not lend itself to meaningful comparisons between the businesses surveyed in 2014 and those surveyed in 2017. The businesses surveyed in each wave of the survey will have business profiles that will be unique to each and potentially so diverse that comparisons between the two samples will have little meaning.

The potential error in the data will need to be taken into account when comparing results from 2017 with those from 2014. Often the results will be too close to report a significant difference despite there being a numerical difference between comparable data from the two data sets.

With online surveys, some respondents choose to skip some questions. This can make direct comparisons between different waves of a survey problematic for some questions. For questions where multiple options are presented this can result in the responses being evaluated over different bases and the percentage responses cannot be directly compared. What can be compared though is the relative ranking of each of the options across the two waves.

E.g.



In the example above, because of the different survey collection methods, it is problematic trying to compare the absolute values presented in the graphs. In the example above, concluding that 'Business development is a less important in 2017 than it was in 2014 is problematic. However the relative positions of each of the options and their relative size in each graph is significant. If one or more of the options has moved up or down in its respective graph then that can be viewed as significant. This effect needs to be taken into account for graphs 5.1.1, 5.1.2, 6.3.1, 6.4.1, 8.1.1, 8.1.2, 10.1.1, 11.1.1, 11.2.1, 15.1.1 and 15.1.2.

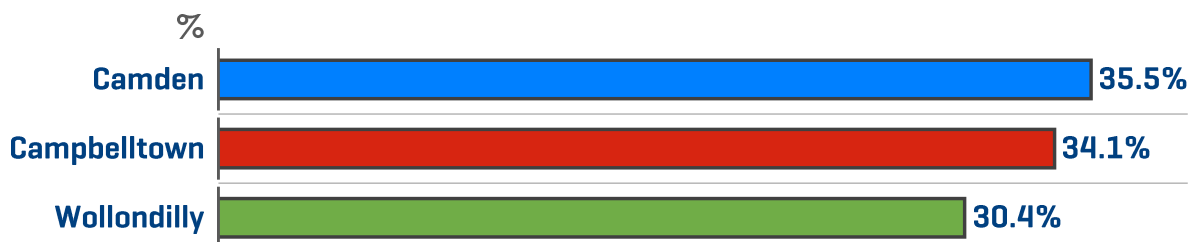
Where rating scales have been used to evaluate responses, an index score has been calculated for both the 2014 and 2017 results. This index score will allow a statistical comparison between the 2014 and 2017 results. Where a statistically significant difference occurs this will be highlighted in the comparison table that will accompany each result that is being compared between the two waves of the survey.

Survey Findings

2.1 LGA Businesses Operate in

Question: *In which local government area is the main location of your business?*

Graph 2.1.1: Businesses by LGA they operate in (n=602)



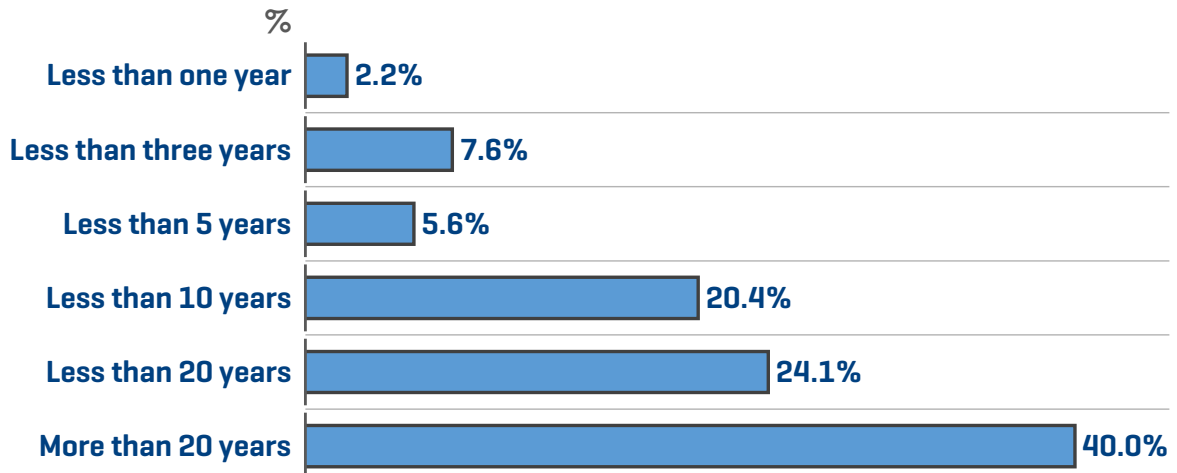
Key Results:

- Of the completed questionnaires, 35.5% were carried out by businesses that operate in the Camden LGA, a further 34.1% within the Campbelltown LGA, while the remaining 30.4% operate in the Wollondilly LGA.
- The 2017 survey is a more representative survey than the 2014 one, where 443 surveys were collected, made up of 30.7% of businesses in Camden, 51.2% in Campbelltown and 18.1% in Wollondilly.

2.2 Time in Business

Question: How long has your business been operating in the Macarthur region?

Graph 2.2.1: Time in business (n=602)



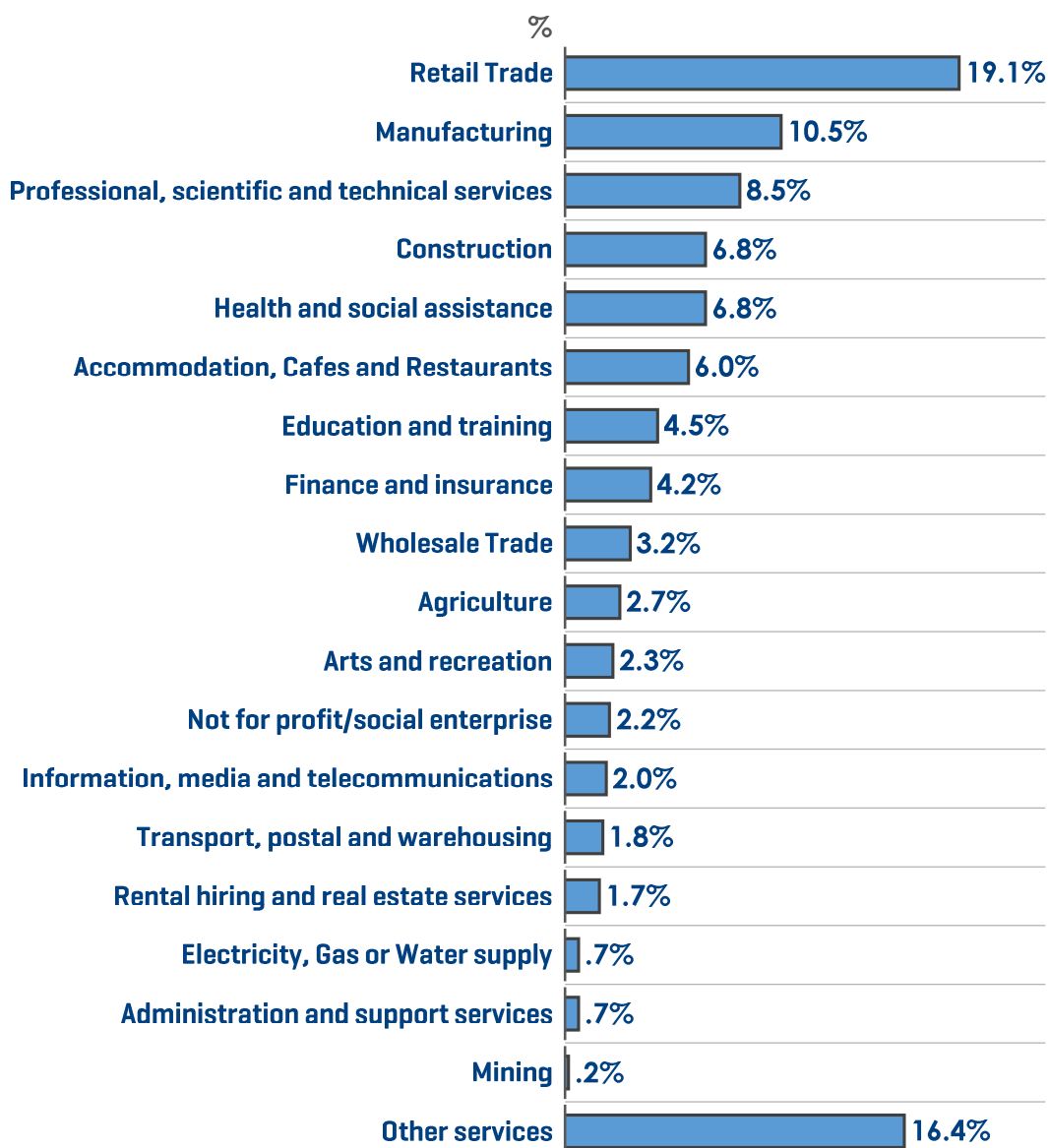
Key Results:

- The vast majority of businesses surveyed (64.1%) have been in business for more than 10 years, while 15.4% of businesses had been in operation for less than 5 years.
- The time in business reported was similar between the two waves of the survey, with 69.5% of the businesses surveyed in 2014 having been in business for 10 years or more.

2.3 Primary Operations of your Business

Question: Which one of the following categories best describes the company's primary business?

Graph 2.3.1: Industries surveyed



Key Results:

- Of the businesses that completed the MACROC Business Survey, almost one in five businesses (19.1%) identified as being in the 'Retail trade' industry while a further 10.5% indicated they were in the 'Manufacturing' industry. These industry breakdowns vary in detail but are overall similar to those from the 2014 survey.

In order to facilitate the ease of data interpretation and reporting, the 18 industry classifications highlighted in Graph 2.3.1 have in most instances been merged to form new classifications for the purposes of this report. This report will focus on the reporting of five (5) industry classifications made up as follows:

Table 2.3.1: Industry classifications for this report

Industry classification	New classification for this report	% of sample
Accommodation, Cafés and Restaurants	Accommodation, Cafés and Restaurants / Arts and Recreation	8.3%
Arts & Recreation		
Construction	Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	9.3%
Electricity, Gas or Water supply		
Transport, Postal and Warehousing		
Wholesale Trade	Retail / Wholesale	22.3%
Retail Trade		
Manufacturing	Manufacturing	10.6%
Professional, Scientific & Technical Services	Professional / Education / Healthcare / Finance and Other Services	46.8%
Rental, Hiring & Real Estate Services		
Information, Media & Telecommunications		
Education and Training		
Finance and Insurance		
Administration and Support Services		
Not for profit / Social Enterprise		
Health and Social Assistance		
Other Services		
Agriculture		

Table 2.3.2: Industry classifications by Council Area

Column n Column %	Camden 214.0	Campbelltown 205.0	Wollondilly 183.0
Agriculture	2.8%	.5%	4.9%
Manufacturing	9.3%	9.8%	13.1%
Construction/Transport/ Electricity, Gas or Water	16.8%	3.9%	6.6%
Retail/Wholesale	20.6%	23.4%	23.0%
Accommodation, Cafes and Restaurants	6.1%	8.3%	10.9%
Professional/Education/ Healthcare/Finance/Other	44.4%	54.1%	41.5%

2.4 Base of Business

Question: *Is your business home based?*

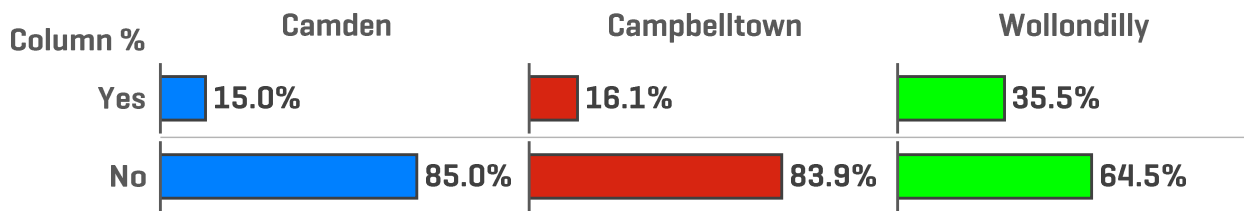
Graph 2.4.1: Base of business (n=602)



Key Results:

- Of businesses that completed the survey, 21.6% identified as operating from home.

Graph 2.4.2: Base of business by area (n=602)



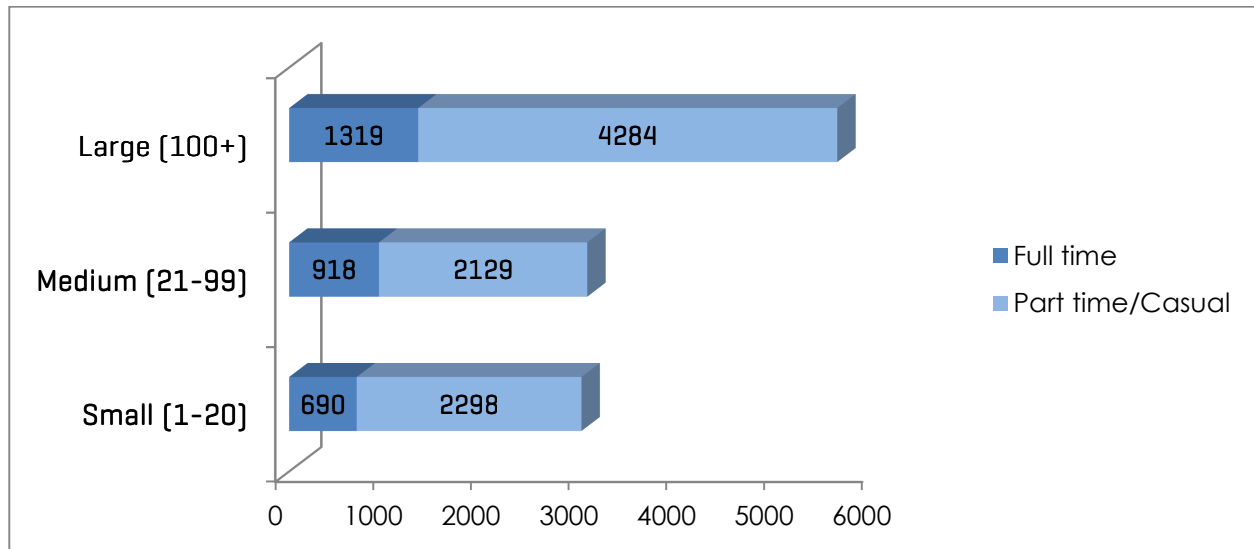
Key Results:

- Results revealed there were more businesses operating from home in the Wollondilly LGA (35.5%).

2.5 Size of Business

Question: *How many people does your business employ?*

Graph 2.5.1: Number of Employees (n=11,638)



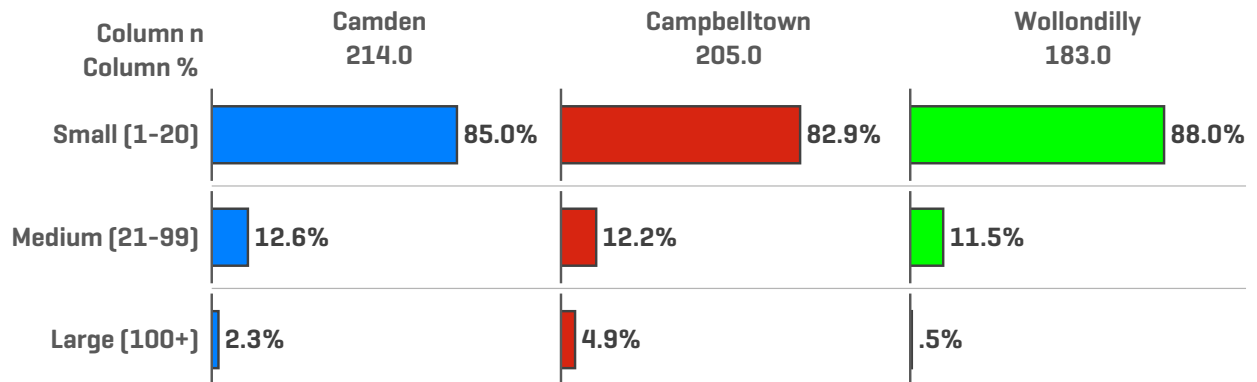
Key Results:

- The businesses surveyed reported that they employed 11,638 between them.
- The large businesses (those with 100 or more employees) surveyed were the biggest employers with 1319 full time staff and 4284 part-time/casual staff.

2.6 Size of Business by Area

Question: *How many people does your business employ?*

Graph 2.6.1: Business size by area



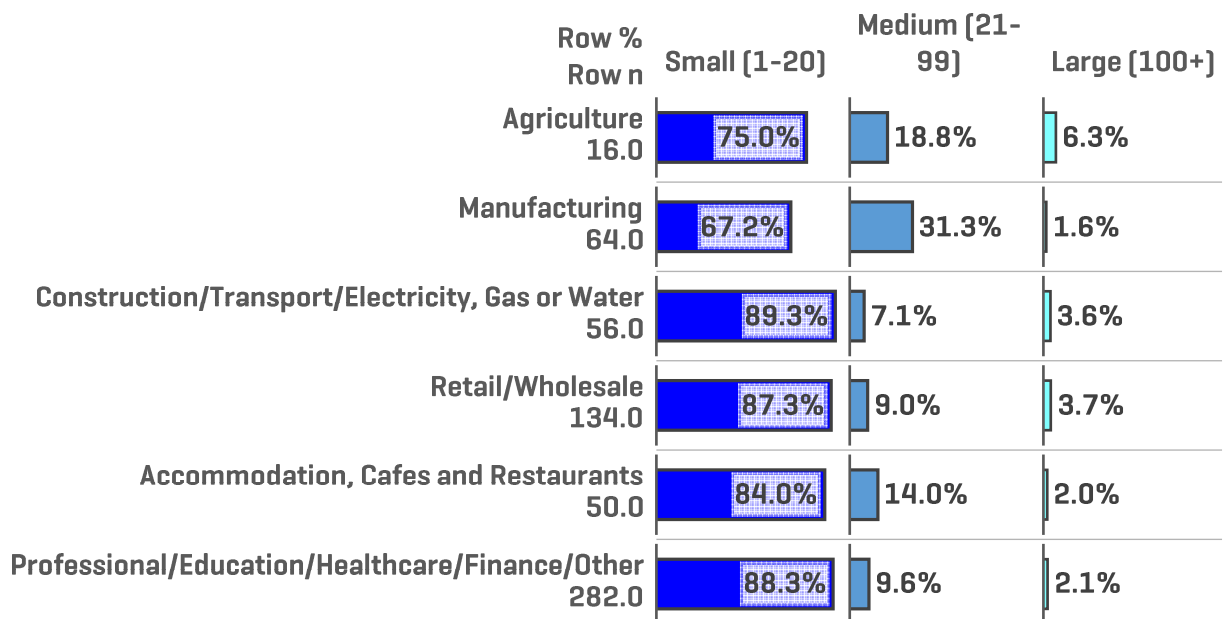
Note: The number below each of the LGA names is the count of the number of respondents from that LGA.

Key Results:

- Results showed that the majority of businesses in each of the three LGA's are considered 'small business', employing between 1 and 20 employees.

Table 2.6.1 gives the breakdown of the five (5) industry classifications created for this report and the subsequent size of the businesses that completed the survey within each classification.

Table 2.6.1: Business size by industry (n=602)



Note: The numbers displayed beneath each of the business classifications is the count of the number of businesses in each classification that answered the survey. E.g. the 134 below Retail/Wholesale indicates that 134 retail/wholesale businesses answered the survey.

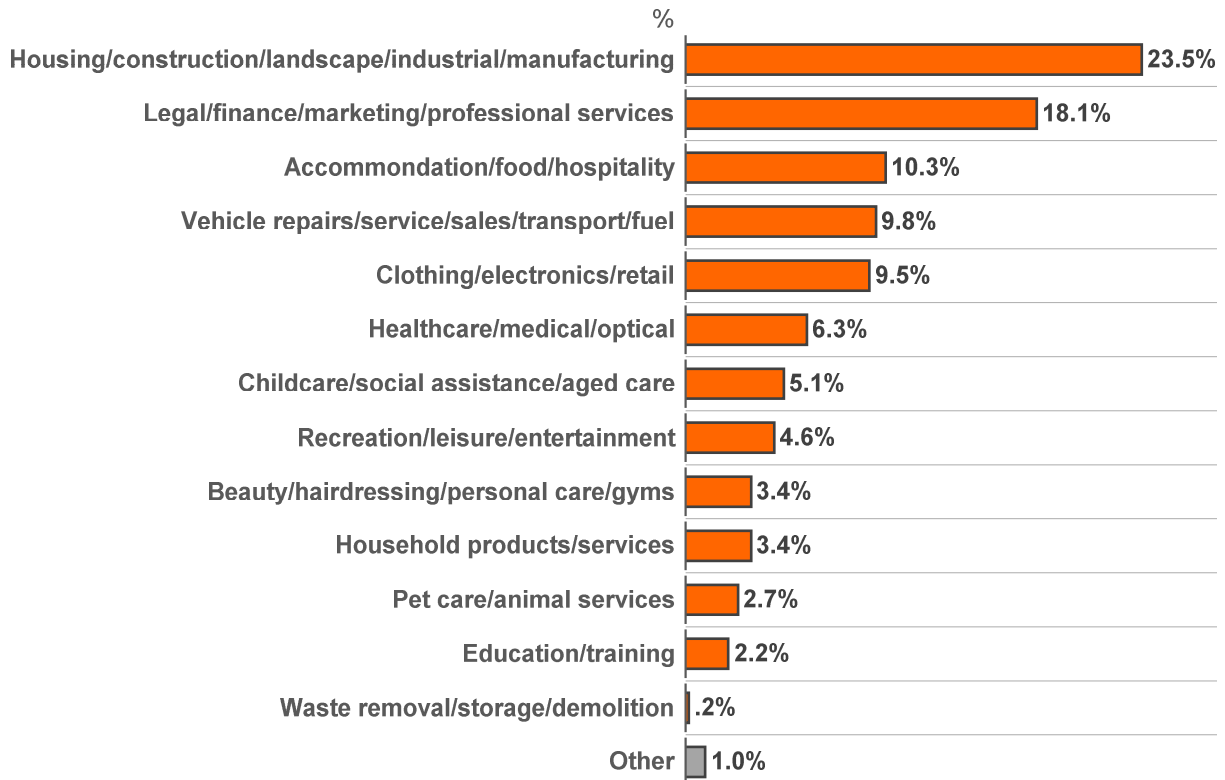
Key Results:

- The majority of businesses across the sectors are small businesses, however one in three (31.7%) businesses in the manufacturing sector are medium size businesses with between 21 and 99 employees.

2.7 Products or Services Business Provides

Question: What are the main products or services that your business provides?

Graph 2.7.1: Main products or services that your business provides



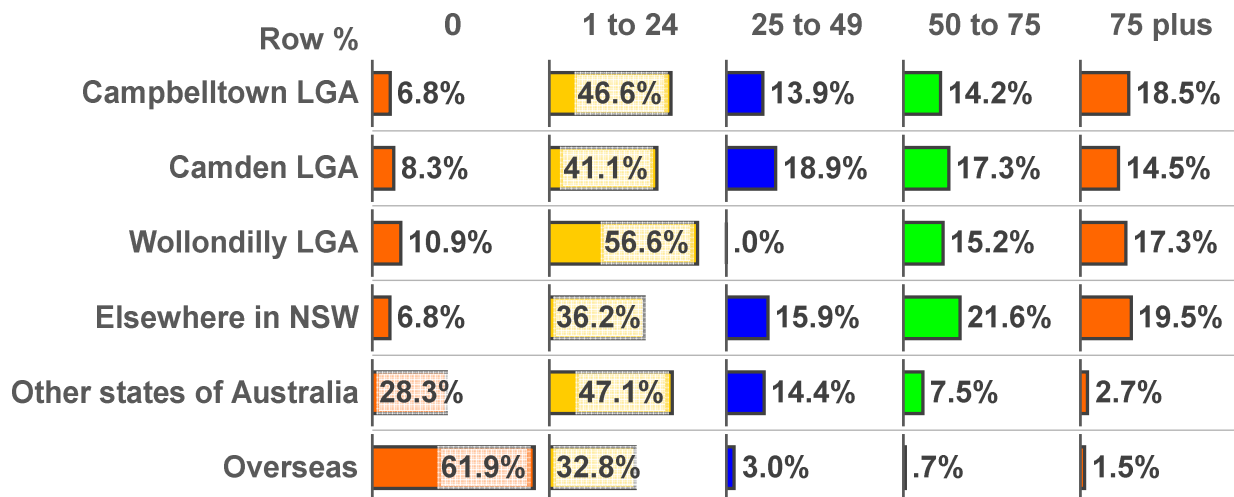
Key Results:

- Businesses that provide 'Housing/ construction/ landscape/industrial /manufacturing' products or services accounted for nearly a quarter (23.5%) of the respondents.
- Businesses that provide 'Legal/finance/marketing/professional services' (18.1%), 'Accommodation/food/hospitality' (10.3%), 'Vehicle repairs/ service/ sales/ transport and fuel' (9.8%) and 'Clothing/electronics/retail' (9.5%) were also significant contributors.

2.8 Products Sold in Certain Areas

Percentage of products/services sold in certain areas:

Graph 2.8.1: Percentage of products/services sold in certain areas

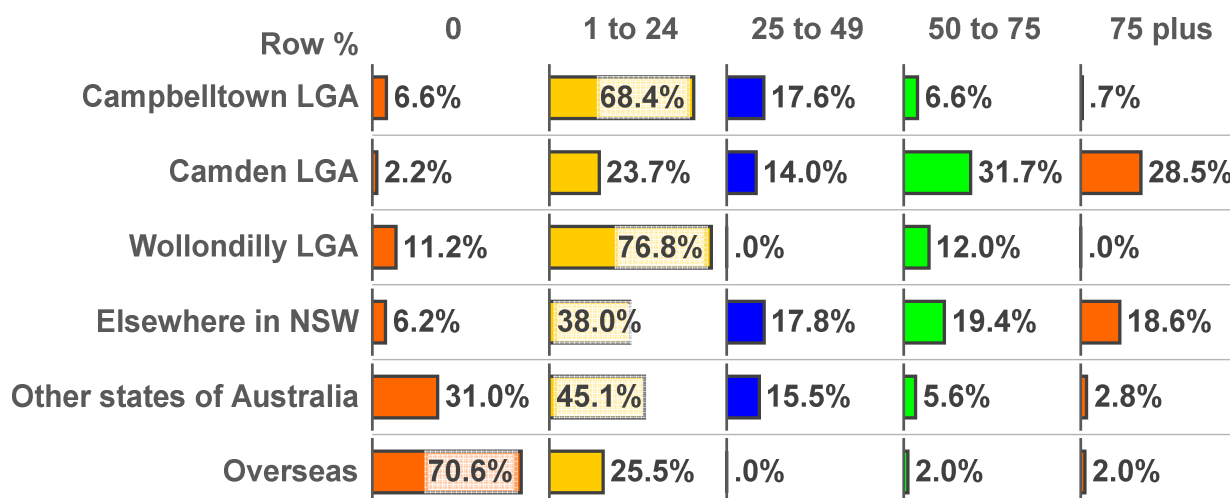


Note: To simplify the presentation of these results, the stated percentages have been recoded into their corresponding percentage band (0, 1 to 24, 25 to 49, 50 to 75 and 75 plus).

Key Results:

- Results showed that 18.5% of businesses sold more than three quarters of their products or services in the Campbelltown LGA.
- One in seven businesses (14.5%) sold three quarters or more of their products or services in Camden LGA while 17.3% of businesses sold three quarters or more of their product in Wollondilly region.
- More than two in five businesses (41.1%) stated that they sold at least half of their products elsewhere in NSW.
- Three in five businesses (61.9%) of businesses indicated that they sold no products or services overseas.

Graph 2.8.2: Percentage of products/services sold in certain areas - Camden

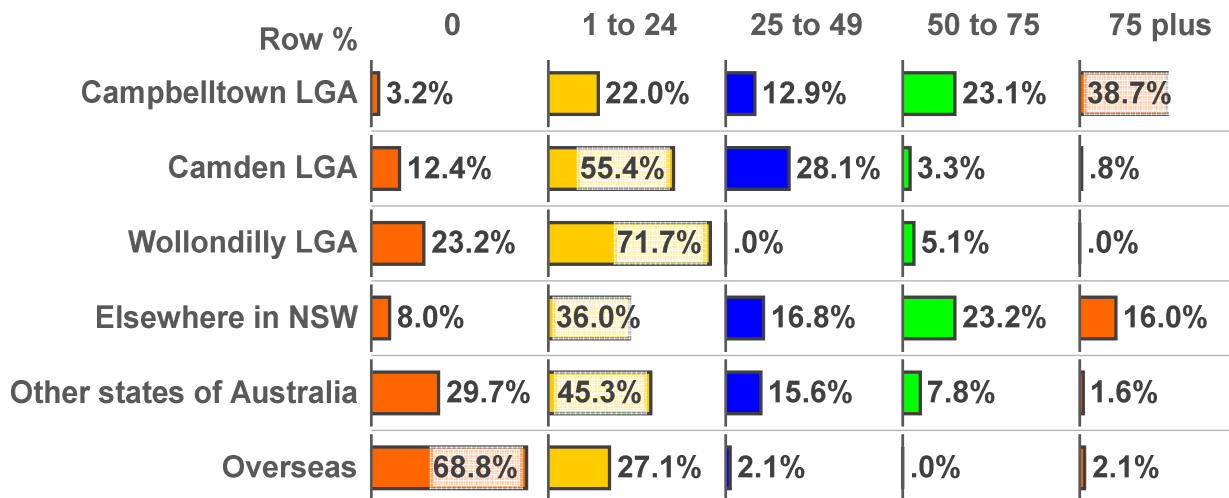


Note: To simplify the presentation of these results, the stated percentages have been recoded into their corresponding percentage band (0, 1 to 24, 25 to 49, 50 to 75 and 75 plus).

Key Results:

- As expected, results showed that a three in ten businesses (28.5%) in the Camden region sold the majority (75% +) of their products / services in the Camden LGA.
- It was also revealed that 18.6% of businesses in Camden LGA sold the majority of their products / services (75+) elsewhere in NSW.

Graph 2.8.3: Percentage of products/services Sold in certain areas - Campbelltown

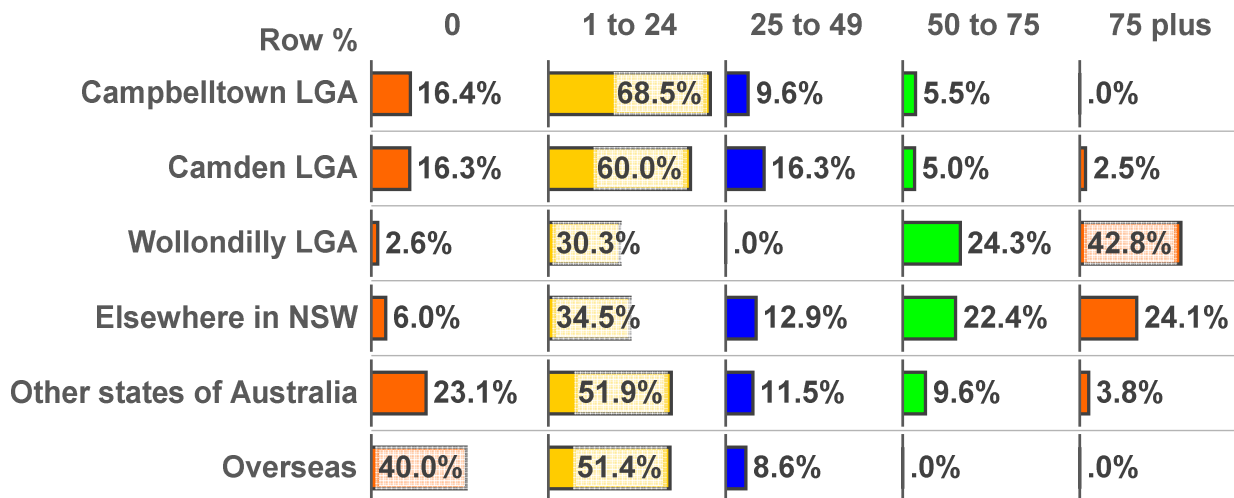


Note: To simplify the presentation of these results, the stated percentages have been recoded into their corresponding percentage band (0, 1 to 24, 25 to 49, 50 to 75 and 75 plus).

Key Results:

- Results revealed that almost half (38.7%) of businesses in the Campbelltown region sold the majority of their products / services in the Campbelltown LGA.
- Results also revealed that 16.0% of businesses in Campbelltown LGA sold the majority of their products elsewhere in NSW.

Graph 2.8.4: Percentage of products/services Sold in certain areas – Wollondilly



Note: To simplify the presentation of these results, the stated percentages have been recoded into their corresponding percentage band (0, 1 to 24, 25 to 49, 50 to 75 and 75 plus).

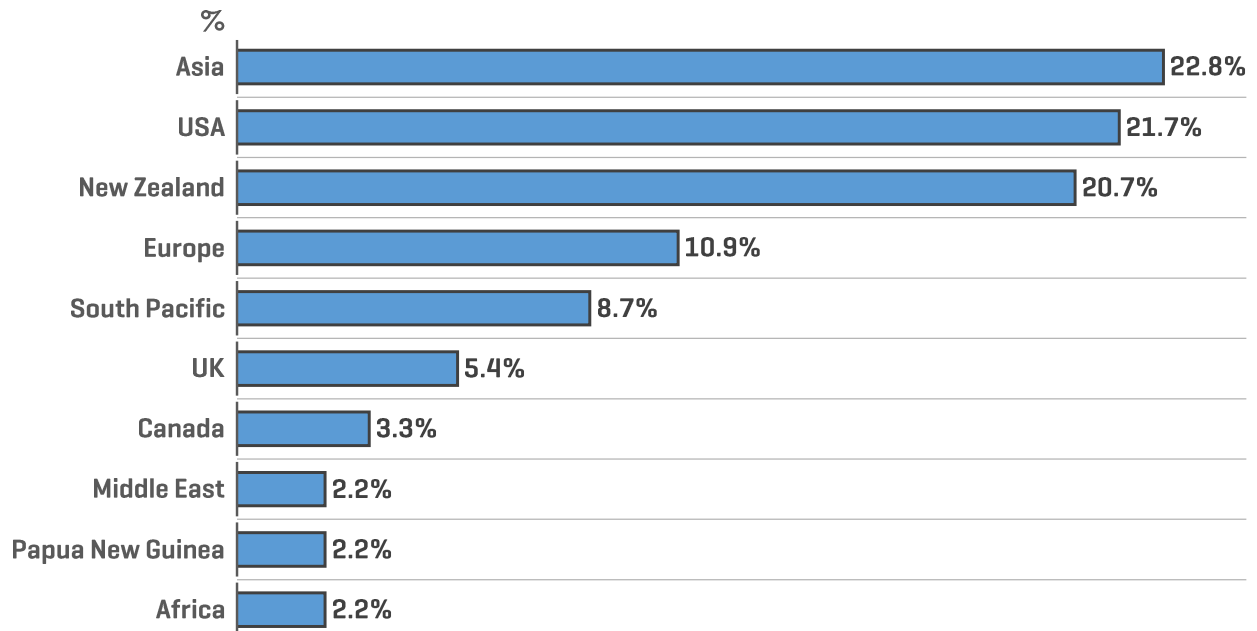
Key Results:

- Two in three businesses (67.1%) in the Wollondilly region sold more than half of their products / services in Wollondilly LGA.
- Results also revealed that 24.1% of businesses in Wollondilly LGA sold the majority (more than 75%) of their products elsewhere in NSW.

2.9 Exporting Overseas

Question: *If you export overseas, which countries do you export to?*

Graph 2.9.1: Export Destinations (n=92)

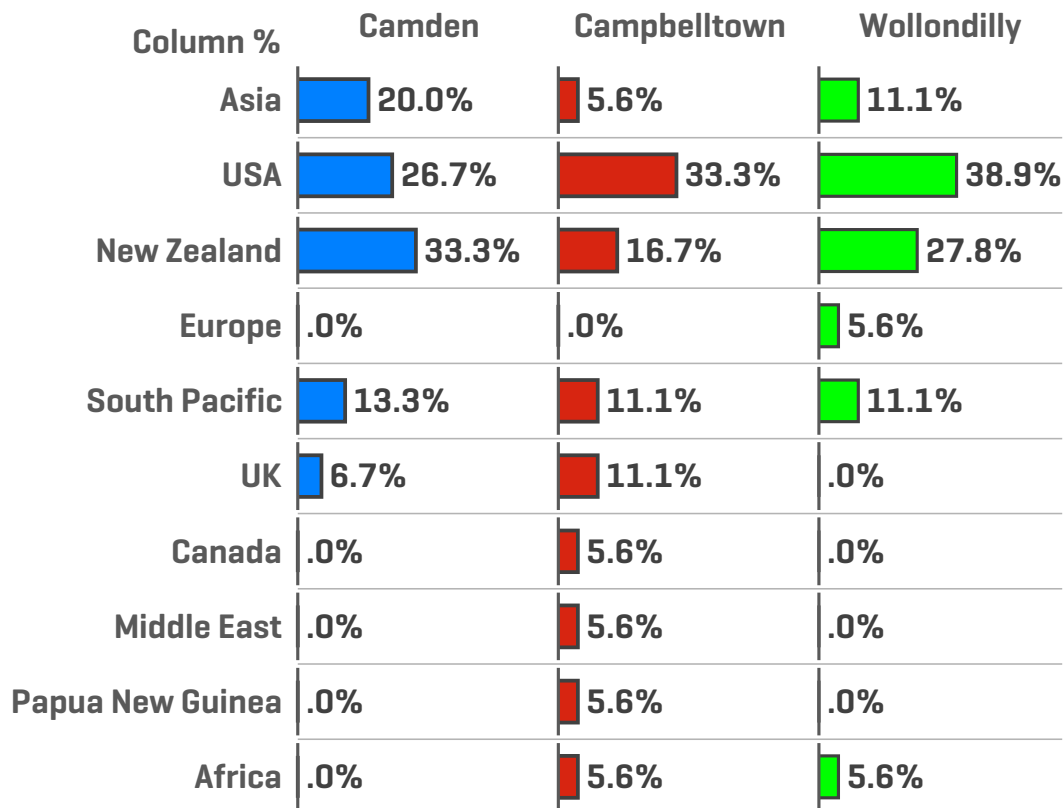


Note: Percentages will not add to 100% because respondents were allowed to indicate more than one destination.

Key Results:

- Asia (22.8%), USA (21.7%) and New Zealand (20.7%) were identified as the top export destinations for businesses surveyed in the MACROC region.

Graph 2.9.2: Export Destinations by LGA

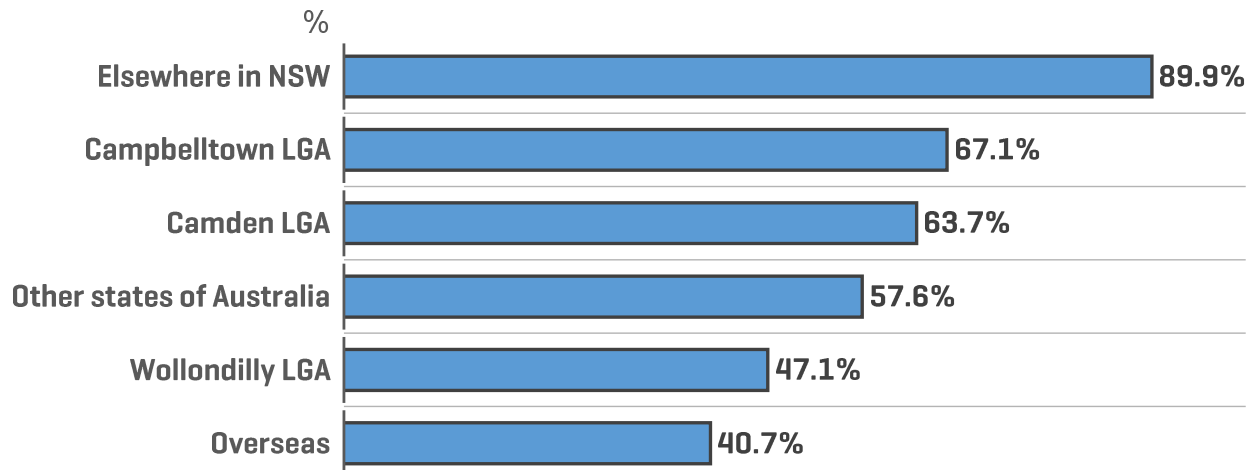


Note: Percentages will not add to 100% because respondents were allowed to indicate more than one destination.

2.10 Location of Suppliers

Question: *In which areas are the majority of your suppliers located?*

Graph 2.10.1: Areas where majority of suppliers are located

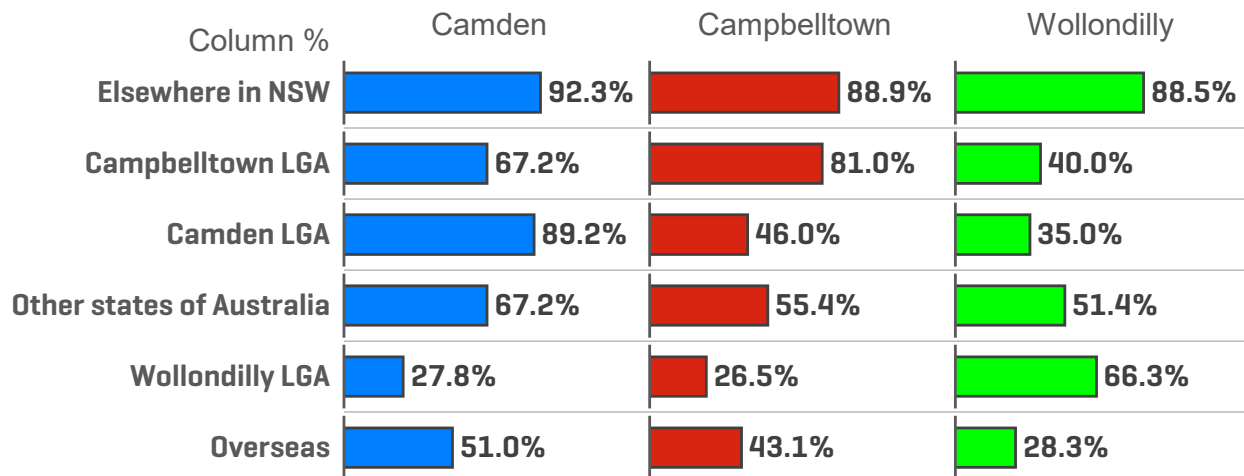


Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- Nearly nine in ten (89.9%) businesses stated that they source at least some of their supplies from elsewhere in NSW.
- Four in ten businesses (40.7%) stated that they source at least some of their supplies from overseas.

Graph 2.10.2: Areas where majority of suppliers are located



Note: Totals will not add up to 100% as some respondents have selected more than one answer

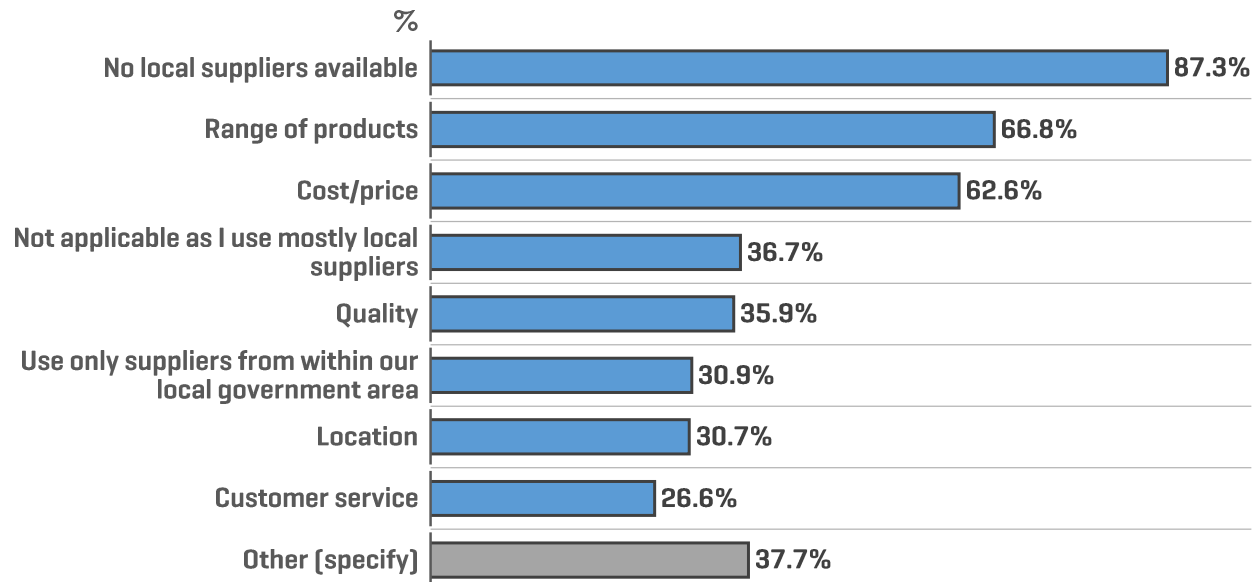
Key Results:

- Businesses in each of the three LGA's indicated that they source more of their supplies from businesses located elsewhere in NSW than from anywhere else.
- Each indicated that suppliers within their own LGA were the second most used.

2.10 Reasons for Using Suppliers from Outside the Area

Question: *If you use suppliers from outside of your local government area, what are the main reasons for doing so?*

Graph 2.11.1: Reason for using suppliers outside the area (n=108)

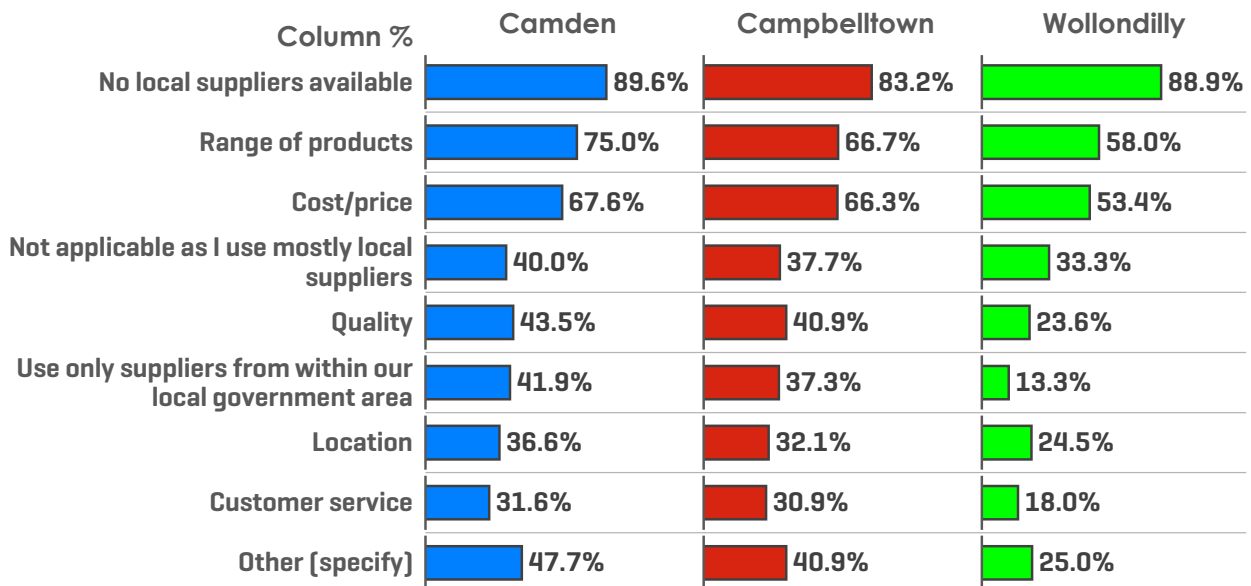


Note: Total will not add up to 100% as some respondent's will have selected more than one answer

Key Results:

- Results showed that 87.3% of businesses that use suppliers from outside of their local government area stated the reason is because there are 'no local suppliers available'.
- Two thirds of those businesses (66.8%) stated the reason was because of the 'range of products' and almost as many (62.6%) indicated it was the 'cost / price'.

Graph 2.11.2: Reason for using suppliers outside the area by area



Note: Total will not add up to 100% as some respondent's will have selected more than one answer

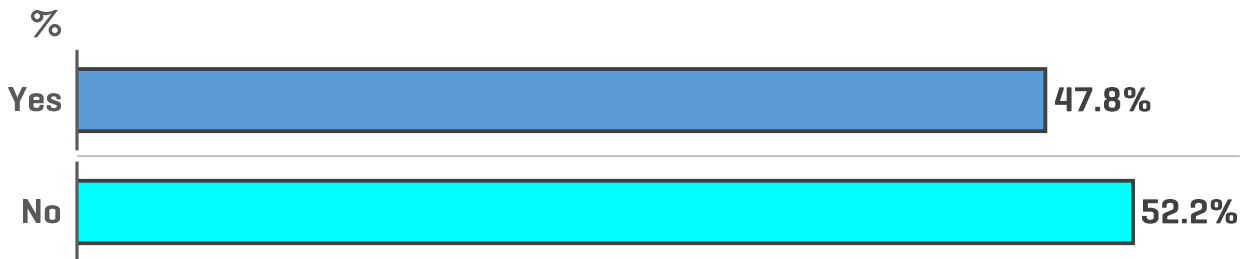
Key Results:

- The 'range of products' was a bigger issue for businesses in the Camden LGA.
- 'Quality', 'Use only suppliers from within our local LGA' and 'Customer service' were less of an issue for businesses in the Wollondilly LGA.

2.12 Products or Services that are Difficult to Obtain from the Area

Question: Are there any products or services which you find difficult to obtain in your local area?

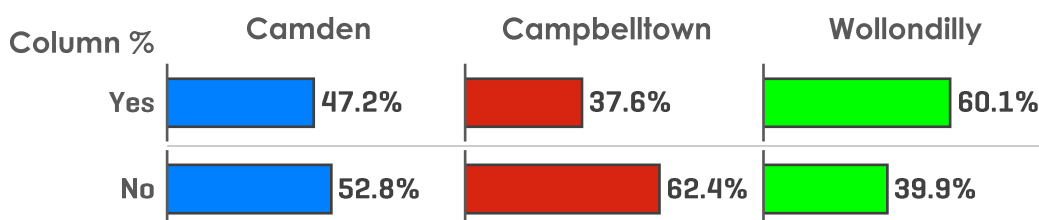
Graph 2.12.1: Products or services which are difficult to obtain (n=602)



Key Results:

- 47.9% of businesses indicated they found it difficult to source inputs in their local area.

Graph 2.12.2: Products or services which are difficult to obtain (n=602)



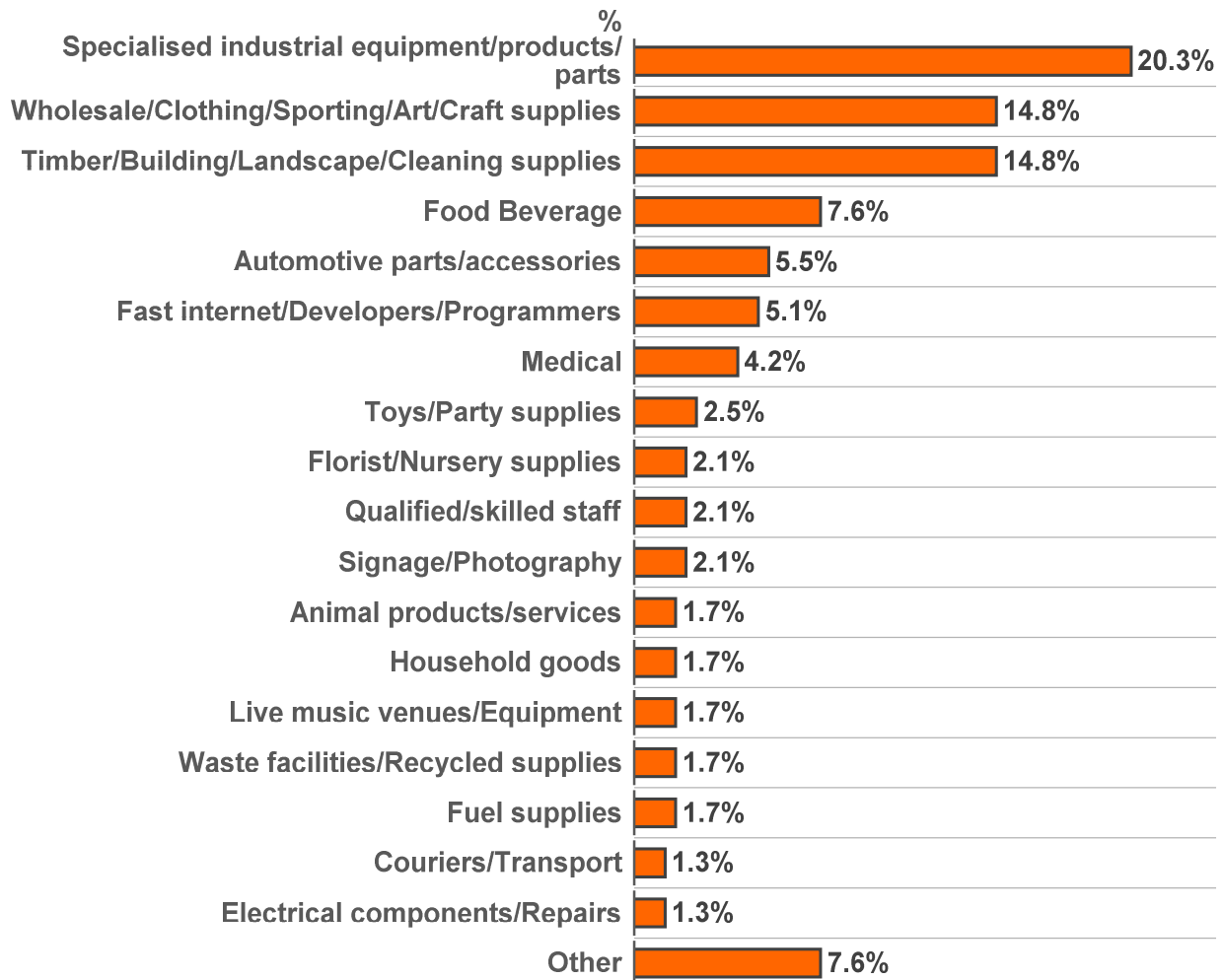
Key Results:

- Results showed that businesses in the Wollondilly LGA (60.1%) were most likely to indicate that there are products / services which are difficult to obtain in their local area.

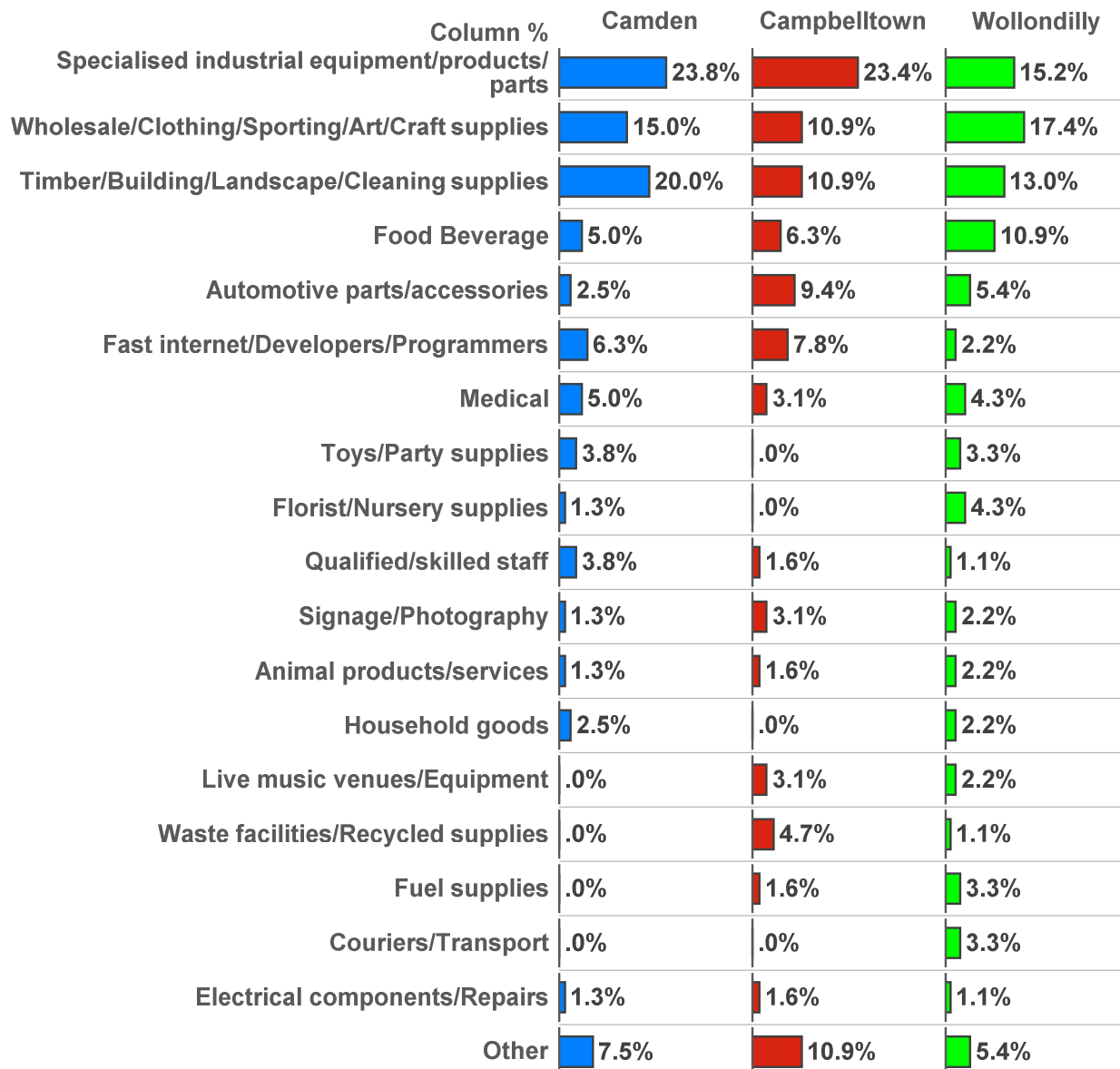
2.13 Types of Products / Services that are Difficult to Obtain

Question: *What types of products or services do you find difficult to obtain within the local area?*

Graph 2.13.1: Types of products or services which are difficult to obtain (n=236)



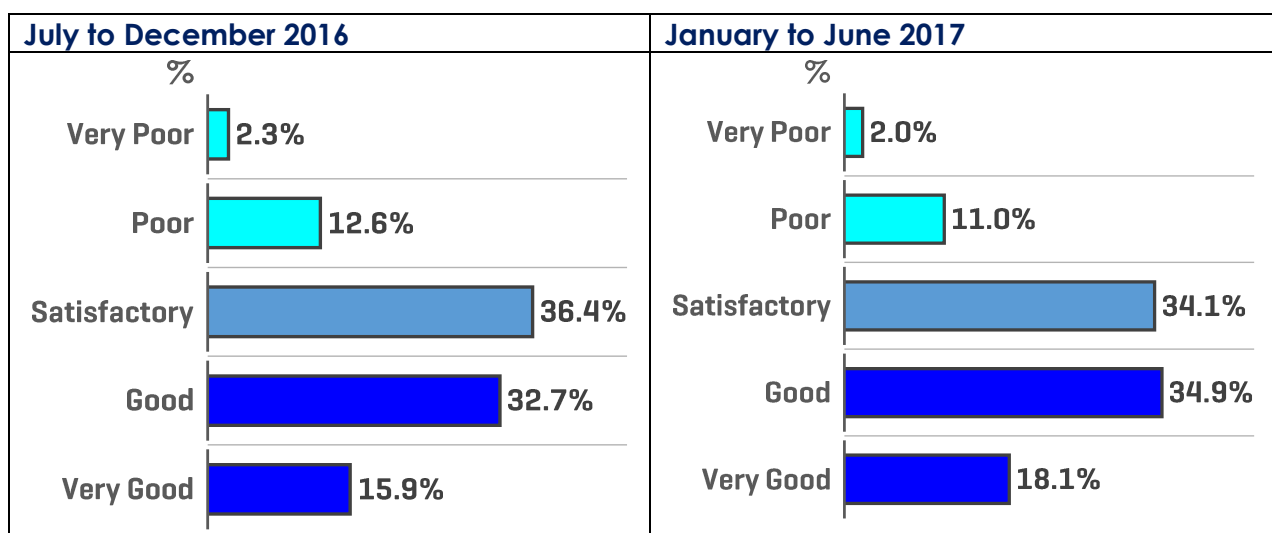
Graph 2.13.1: Types of products or services which are difficult to obtain (n=236)



3.1 Trading Conditions

Question: The following questions relate specifically to how you see your business has performed for the preceding period (July to December 2016) and how it is performing in the current period (January to June 2017)?

Graph 3.1.1: Trading conditions (n=602)



Graph 3.1.1a: Trading conditions – Index comparisons to 2014

Trading Conditions	Actual	Expected
2014	27	45
2017	34	40

Legend:

	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

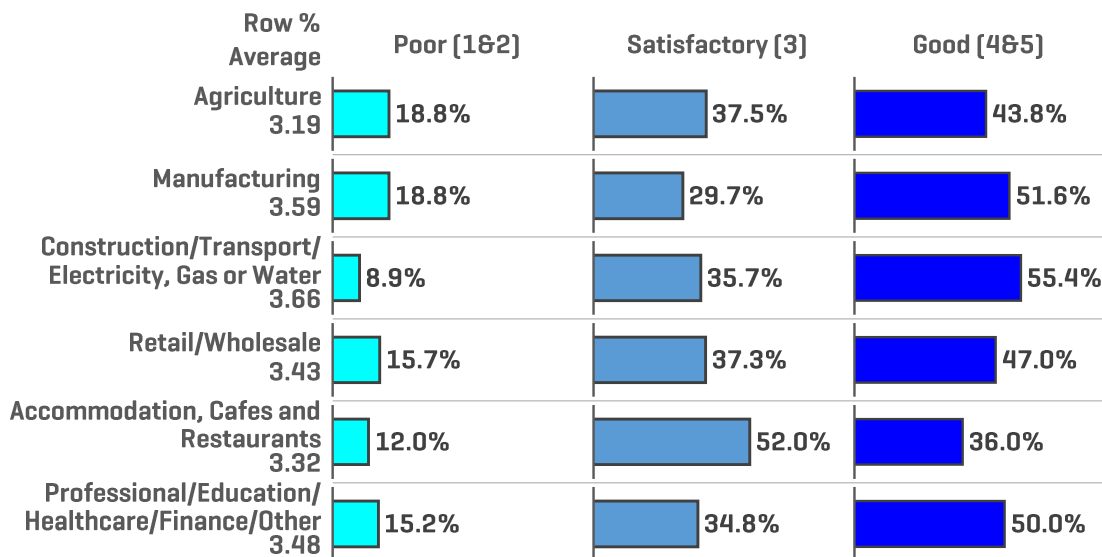
Note: The index is calculated by subtracting the percentage of those businesses that reported or expected poor trading conditions from those businesses that reported or expected good trading conditions.

Key Results:

- Almost half (48.6%) of businesses reported trading conditions for the six months from July to December, 2016 as being 'good' (32.7%) or 'very good' (15.9%). This is up from the 44.4% reported in 2014.
- Trading conditions for January through to June 2017 are expected to improve, with 53.0% of businesses of the view that trading conditions will be 'good' or 'very good' over this period. Businesses are not as confident as they were in 2014, where 56.8% felt that trading conditions would be 'good' or 'very good'.
- More than one in three businesses (34.1%) expected trading conditions to be satisfactory over the current period.

- Expectations for the current period in 2017 are less optimistic than they were in 2014.

Graph 3.1.2: Actual trading conditions by industry type – July to December 2016



Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have rated the trading conditions. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.1.2a: Actual trading conditions by industry type – Index comparison

Trading Conditions	Agriculture	Manufac.	Construct.	Retail/W	Accomm.	Profess.
2014	25	-2	35	19	38	45
2017	25	33	47	31	24	35

Legend:

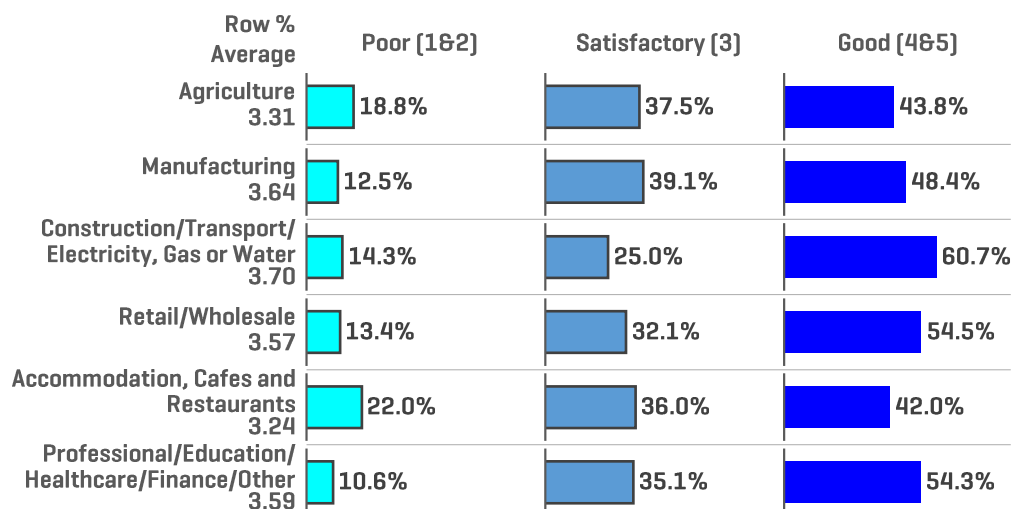
	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is calculated by subtracting the percentage of those businesses that reported poor trading conditions from those businesses that reported good trading conditions.

Key Results:

- More than half of businesses in the 'Construction, transport and utilities', 'Manufacturing' and 'Professional, education, healthcare and other' found trading conditions to be good during the July to December 2016 period.
- Businesses in the 'Accommodation, food services, arts and recreation' (41.0%) reported a significant drop in trading conditions when compared to the 2014 result, with those reporting good trading conditions at 36.0% down from 48% in 2014.
- 'Manufacturing' businesses reporting 'good' trading conditions on the other hand have risen substantially from 31.0% in 2014 to 52.4% in 2016.
- Businesses have reported better trading conditions in 2017, when compared to 2014, in the 'Manufacturing', the 'Construction, transport and utilities' and 'Retail/Wholesale' sectors and poorer trading conditions in the 'Accommodation, Cafes and Restaurants /Arts and Recreation' and 'Professional, education, healthcare and other' sectors.

Graph 3.1.3: Expected trading conditions by industry type – January to June, 2017

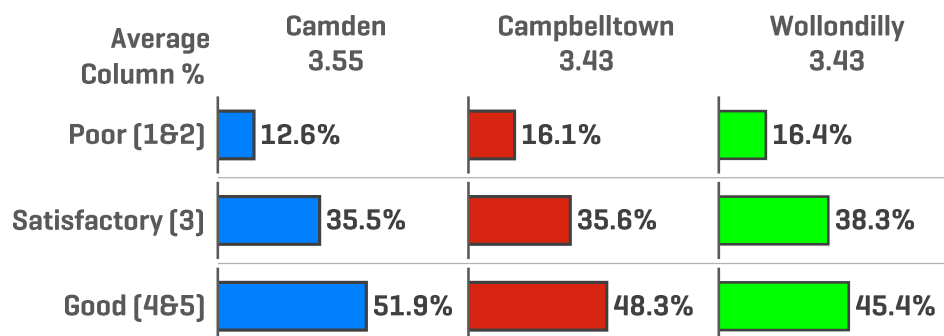


Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have rated the trading conditions. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- For all but the 'manufacturing' sector, expectations of trading conditions for the period January to June 2016 were more positive than the actual performance from July to December 2016.
- The 'Construction, transport, electricity, gas or water' sector is most confident about the current period with 60.7% forecasting 'good' trading conditions.
- When compared with the expected trading conditions for July to December 2014, 'Accommodation, cafes and restaurants' (42% down from 62%) and 'Professional, education, healthcare, finance and other' (54.3% down from 61%) have recorded the biggest drops in 'good' ratings.
- On the other hand 'Construction, transport and utilities (60.7% up from 51%) and 'Manufacturing' (49.2% up from 36%) have recorded significant rises in expected trading conditions since the July to December 2014 measure.

Graph 3.1.4: Actual trading conditions by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have rated the trading conditions. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.1.4a: Actual trading conditions by area – Index comparison

Trading Conditions	Camden	Campbelltown	Wollondilly
2014	30	24	29
2017	39	32	29

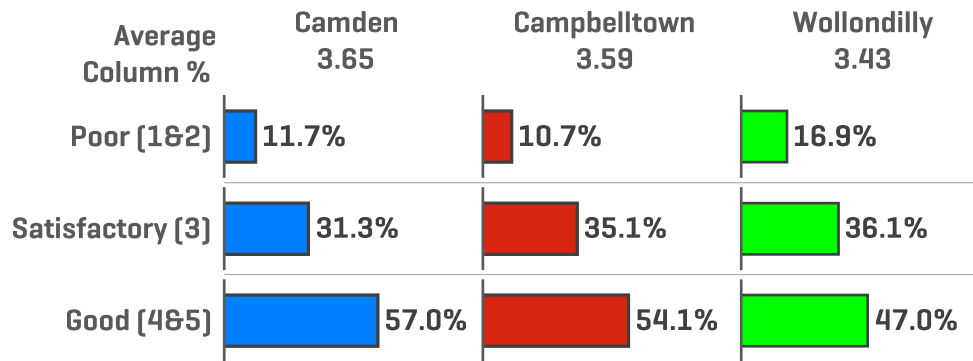
Legend:	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is calculated by subtracting the percentage of those businesses that reported poor trading conditions from those businesses that reported good trading conditions.

Key Results:

- Each of the three (3) LGA's experienced similar proportions of business with trading conditions in the 'poor', 'satisfactory' and 'good' ranges for the period July to December 2016.
- Businesses in Camden (51.9% up from 46.3%) and Campbelltown (48.3% up from 42.8%) have recorded significant rises in 'good' trading conditions since the January to June 2014 measure.
- Businesses in Camden and Campbelltown reported that trading conditions in 2017 were better than they were in 2014. Wollondilly businesses reported no change.

Graph 3.1.5: Expected trading conditions by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have rated the trading conditions. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- Only the Wollondilly LGA is not expecting a boost in trading conditions in the January to June 2017 period.

Table 3.1.1: Net Response - Trading conditions

	Jan – Jun 2014 Net Score	July – Dec 2014 Net Score	July - Dec 2016 Net Score	Jan-Jun 2017 Net Score	Improve (+) or Worsen (-)
Overall	27	45	34	40	+6
Accommodation, Cafés and Restaurants / Arts and Recreation	38	48	24	21	-3
Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	35	35	47	46	-1
Retail / Wholesale	19	44	31	41	+10
Manufacturing	-2	21	35	37	+2
Professional / Education / Healthcare / Finance and Other Services	33	50	35	44	+9
Agriculture	25	25	0	0	0

Note: The index is calculated by subtracting the percentage of those businesses that reported or expected poor trading conditions from those businesses that reported or expected good trading conditions.

Key Results:

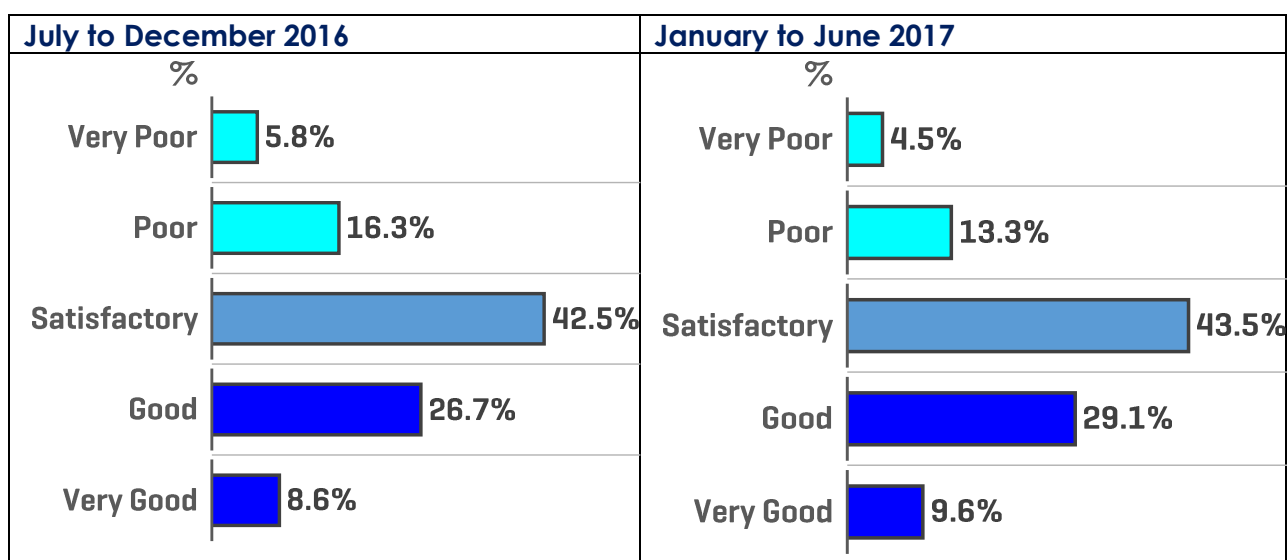
- Table 3.1.1 shows the net response for trading conditions. The net response is determined by subtracting the number of poor responses from the number of positive responses.
- Results show that all industries with the exception of 'Accommodation, Cafés and Restaurants / Arts and Recreation' and 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' are expecting a higher net response compared to the previous six months. The 'Retail / Wholesale' (+10) and 'Professional / Education / Healthcare / Finance and Other Services' (+9) were the sectors with the largest expected improvement.
- Overall the MACROC economy is performing strongly with net response of businesses indicating improving trading conditions. Trading activity was found to be strongest in the 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' (47) sector.

- Expectations across the regional economy for the current period (January to June 2017) are extremely positive across all sectors.

3.2 Profitability

Question: *The following question relates specifically to how you see your business has performed for the preceding period (July to December 2016) and how it is performing in the current period (January to June 2017)?*

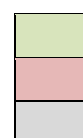
Graph 3.2.1: Profitability



Graph 3.2.1a: Profitability

Profitability	Actual	Expected
2014	7	27
2017	13	21

Legend:



2017 Statistically higher than 2014

2017 Statistically lower than 2014

No Statistical difference

Note: The index is calculated by subtracting the percentage of those businesses that reported or expected poor profitability from those businesses that reported or expected good profitability.

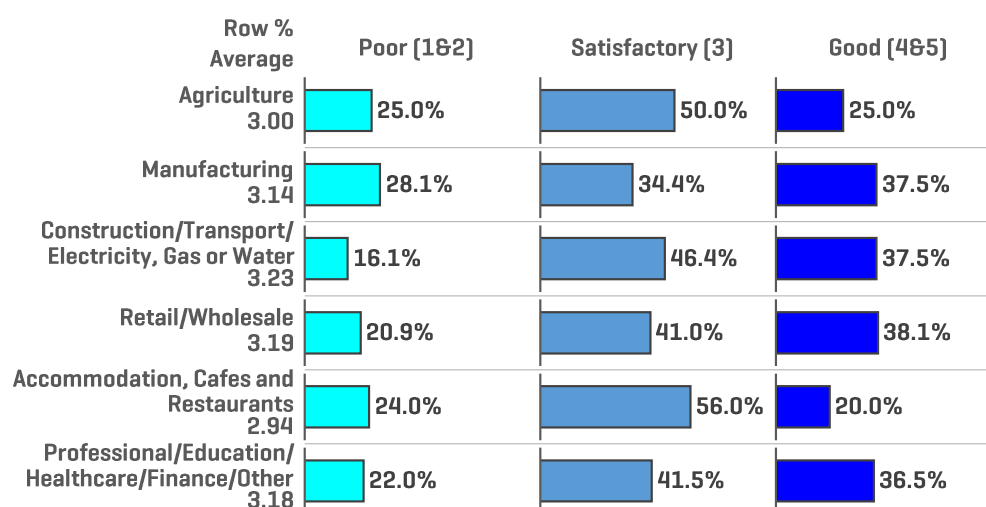
Key Results:

- Almost one in three businesses (35.3%) indicated that their profitability was favourable, that is 'good' (26.7%) or 'very good' (8.6%) over the six months from July to December 2016. This is on par with the 2014 result of 32.8%.
- A further two in five businesses (42.5%) felt their profitability was satisfactory, similar to the 2014 result of 41.4%.
- Profitability for the period January to June 2017 is expected to improve marginally, with nearly two in five businesses (38.7%) indicating profitability would

be 'good' (29.1%) or 'very good' (9.6%) over this period. This result is down from the 43.5% of businesses that expected 'good' trading conditions in 2014.

- Businesses reported a higher level of profitability when compared to 2014 but were less optimistic about prospects for the current period.

Graph 3.2.2: Actual profitability by industry type – July to December, 2016



Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have rated the profitability. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.2.2: Actual profitability by industry type – Index comparison

Profitability	Agriculture	Manufac.	Construct.	Retail/W	Accomm.	Profess.
2014	-25	-15	8	19	18	12
2017	0	9	21	17	-4	15

Legend:

- 2017 Statistically higher than 2014
- 2017 Statistically lower than 2014
- No Statistical difference

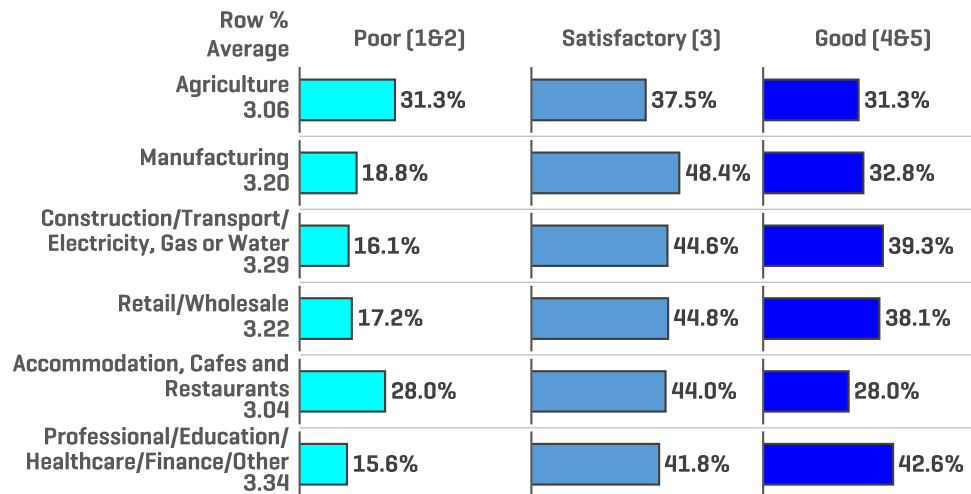
Note: The index is calculated by subtracting the percentage of those businesses that reported poor profitability from those businesses that reported good profitability

Key Results:

- All sectors reported similar profitability results for the July to December 2016 period with the exception of the 'Accommodation, Cafés and Restaurants / Arts and Recreation' sector where only 20.0% of businesses indicated 'good' profitability. This result is down considerably from the January to June 2014 result where 35% of businesses in the sector reported 'good' profitability.
- Businesses in the 'Manufacturing' and 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' sectors reported improved profitability

when compared to 2014 but the 'Accommodation, Cafés and Restaurants / Arts and Recreation' sector reported a drop in profitability.

Graph 3.2.3: Expected profitability by industry type – January to June 2017

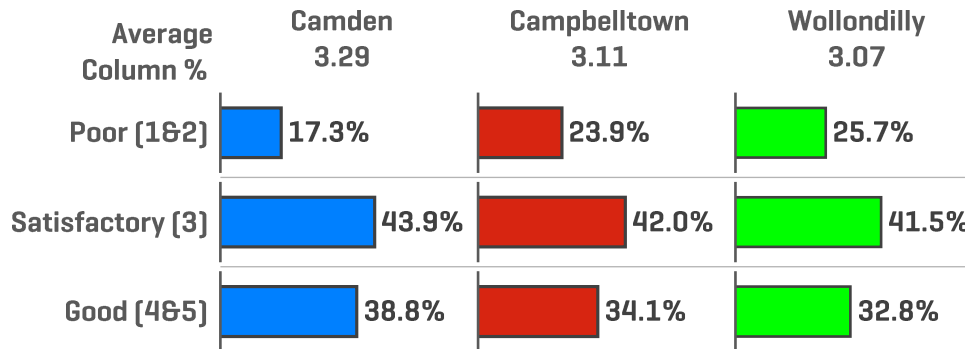


Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have rated expected profitability. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- With the exception of 'Manufacturing' (33.3% down from 38.1%) and 'Retail/Wholesale' (unchanged), all sectors recorded moderate rises in business's expectations for profitability for the January to June 2017 period.

Graph 3.2.4: Actual profitability by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have rated profitability. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.2.4: Actual profitability by area – Index comparison

Profitability	Camden	Campbelltown	Wollondilly
2014	13	5	4
2017	22	10	7

Legend:

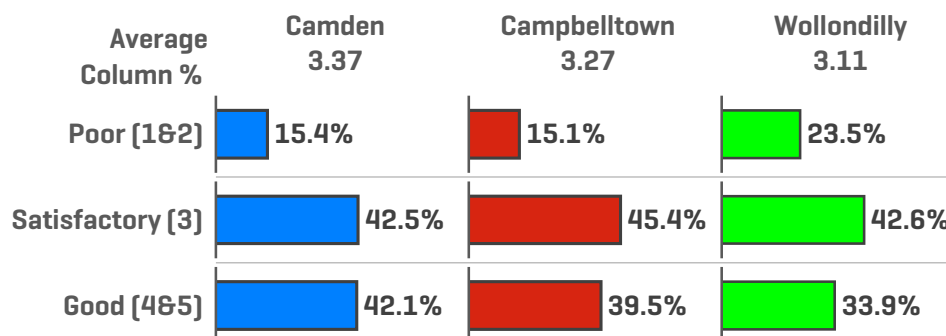
	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is calculated by subtracting the percentage of those businesses that reported poor profitability from those businesses that reported good profitability

Key Results:

- Camden LGA had the most businesses experiencing 'good' profitability (38.8%). This was also the case in 2014 but is an even stronger result, up from 34.5% reported in 2014.
- In a result on par with the 2014 result (33.1%), one in three businesses (34.1%) in the Campbelltown LGA recorded a rating in the 'good' range.
- Businesses in the Camden LGA reported in rise profitability for the July to December 2016 period when compared to 2014.

Graph 3.2.5: Expected profitability by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have rated expected profitability. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- Camden (42.1%) and Campbelltown (39.5%) businesses were the most optimistic about a good profit result for the January to June 2017 period with businesses in the Wollondilly region significantly less upbeat, with one in three (33.9%) expecting a good profit result..
- The result for Wollondilly businesses is down significantly from the 44.3% expecting good profitability in 2014.

Table 3.2.1: Net Scores - Profitability

	Jan – Jun 2014 Net Score	July – Dec 2014 Net Score	July – Dec 2016 Net Score	Jan – Jun 2017 Net Score	Improve (+) or Worsened (-)
Overall	7	27	13	21	+8
Accommodation, Cafés and Restaurants / Arts and Recreation	18	38	-3	0	+3
Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	8	16	21	23	+2
Retail / Wholesale	2	27	17	21	+4
Manufacturing	-15	10	11	14	+3
Professional / Education / Healthcare / Finance and Other Services	12	31	15	27	+12
Agriculture	-25	0	0	0	0

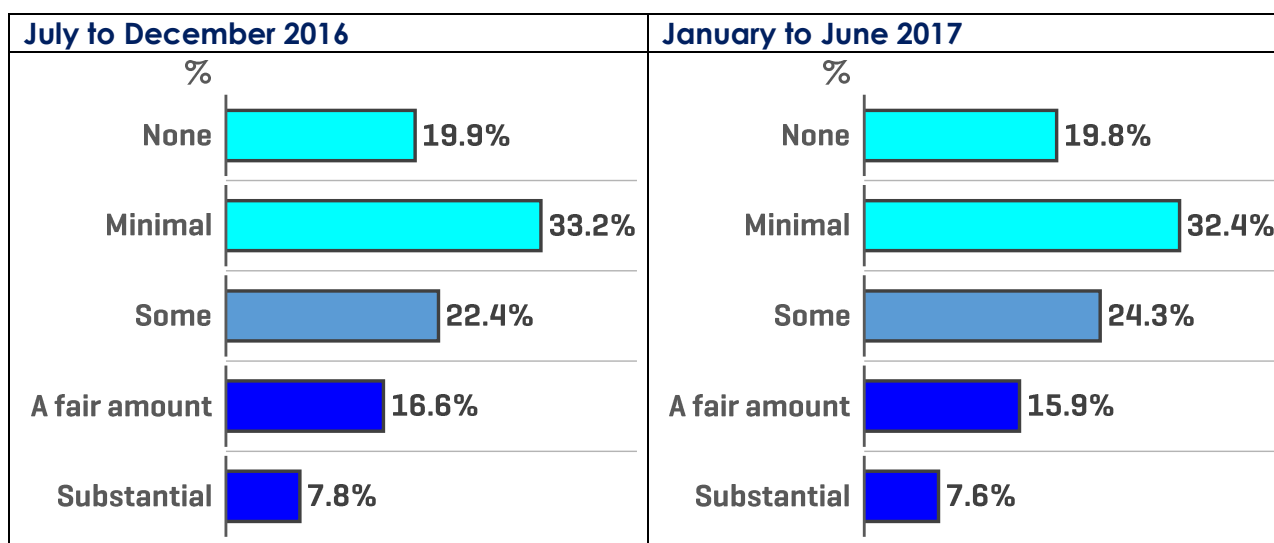
Key Results:

- Overall, the index of profitability is expected to improve over the July to December period by +8 points.
- This index was positive for all sectors.
- The strongest result is the 'Professional / Education / Healthcare / Finance and Other Services' sector with an index of +12.
- Profitability reported by businesses in 'Accommodation, Cafés and Restaurants / Arts and Recreation' was the poorest result with a July to December 2016 index score of -3.
- Manufacturing is the big improver moving from a profitability index of -15 for the January to June 2014 period to +11 for the July to December 2016 period. This is a turnaround of 26 index points.

3.3 Capital Expenditure

Question: *The following question relates specifically to how you see your business has performed for the preceding period (July to December 2016) and how it is performing in the current period (January to June 2017)?*

Graph 3.3.1: Capital expenditure



Graph 3.3.1: Capital expenditure – Index comparison

Capital Expenditure	Actual	Expected
2014	34	30
2017	47	48

Legend:

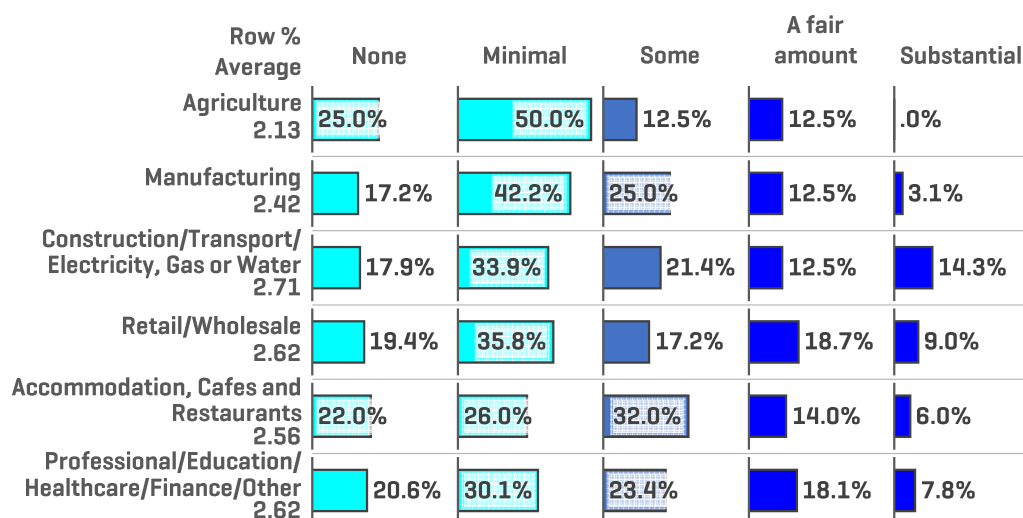
	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported or expected at least 'some' capital expenditure.

Key Results:

- A total of 46.8% of businesses indicated they made “at least some” capital expenditure in the six months from July to December 2016.
- Capital expenditure is expected to hold up in the January to June 2017 period, with 47.8% of businesses indicating ‘at least some’ capital expenditure.
- Both reported and expected capital expenditure is up when compared to 2014.

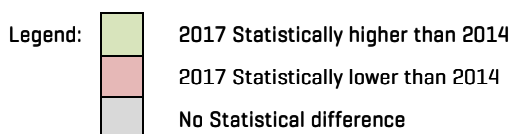
Graph 3.3.2: Actual capital expenditure by industry type – July to December 2016



Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have reported their level of capital expenditure. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.3.2a: Actual capital expenditure by industry type – Index comparison

Capital Expenditure	Agriculture	Manufac.	Construct.	Retail/W	Accomm.	Profess.
2014	25	20	29	29	37	39
2017	25	41	48	45	52	49



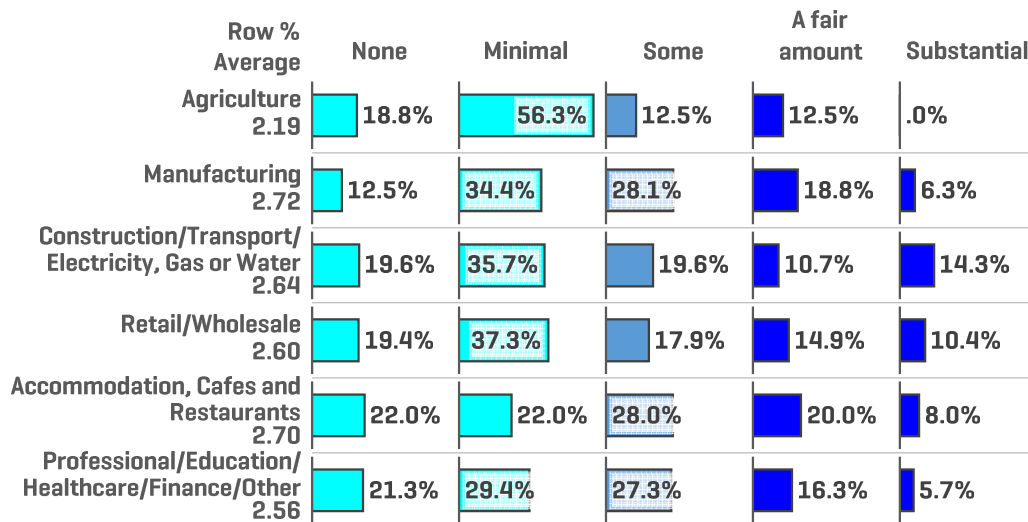
Note: The index is the percentage of businesses that reported at least 'some' capital expenditure.

Key Results:

- Businesses in the 'Construction/Transport/Electricity, Gas or Water' sector were the most likely to report a substantial increase in capital expenditure over the period July to December 2016
- The 'Professional / Education / Healthcare / Finance and Other Services' sector reported a large outlay (49.3%) of 'at least some' capital expenditure over this period up significantly from the 39.0% they reported in 2014.

- Surprisingly given their otherwise strong results, the 'Manufacturing' sector recorded the lowest expenditure on capital with 39.7% of businesses indicating 'at least some' expenditure.
- Businesses in the 'Manufacturing', Accommodation, Cafés and Restaurants / Arts and Recreation', Construction / Transport, Postal and Warehousing / Electricity, Gas or Water', 'Retail / Wholesale' and 'Professional / Education / Healthcare / Finance and Other Services' sectors all reported higher levels of capital expenditure when compared to 2014.

Graph 3.3.3: Expected capital expenditure by industry type – January to June, 2017

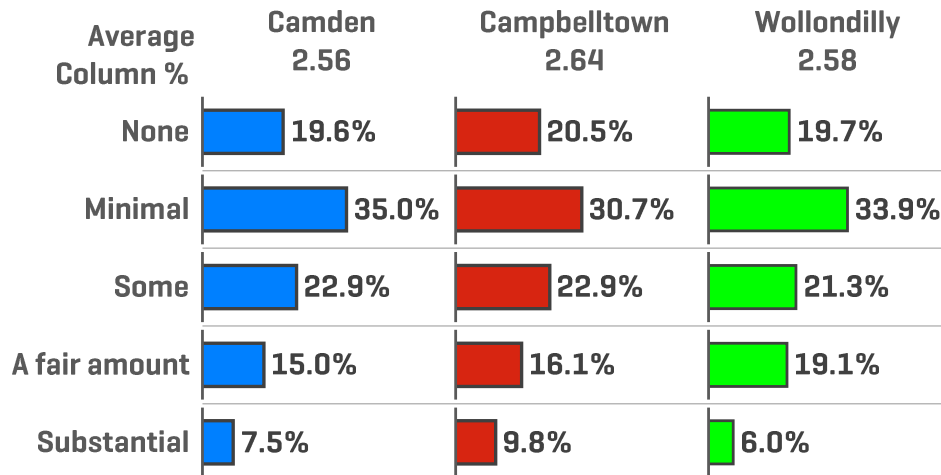


Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have reported their expected level of capital expenditure. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- Expectations for capital expenditure for the period January to June 2017 are highest amongst businesses in the ‘Manufacturing’ (52.3%), the ‘Professional / Education / Healthcare / Finance and Other Services’ (49.3%) and ‘Accommodation, Cafes & Restaurant’ (56.0%), with businesses indicating they will need ‘at least some’ capital expenditure for this period.
- Businesses within the ‘Retail/Wholesale’ sector were most likely to either not invest or invest in minimal capital for the January to June 2017 period.

Graph 3.3.4: Actual capital expenditure by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have reported their level of capital expenditure. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.3.4a: Actual capital expenditure by area

Capital Expenditure	Camden	Campbelltown	Wollondilly
2014	36	33	33
2017	45	49	46

Legend:

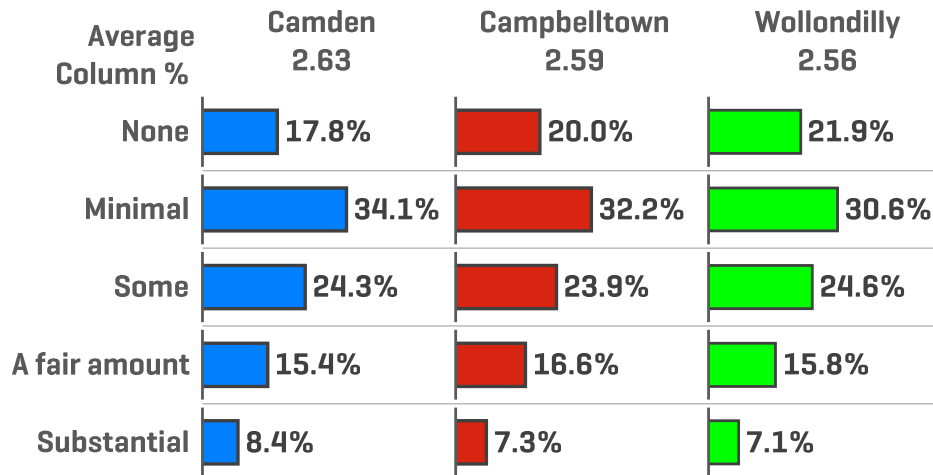
	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported at least 'some' capital expenditure.

Key Results:

- Spending on capital for the July to December 2016 period was similar across the three LGAs.
- Reported spending on capital was higher for all three LGAs when compared to 2014.

Graph 3.3.5: Expected capital expenditure by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have reported their level of expected capital expenditure. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

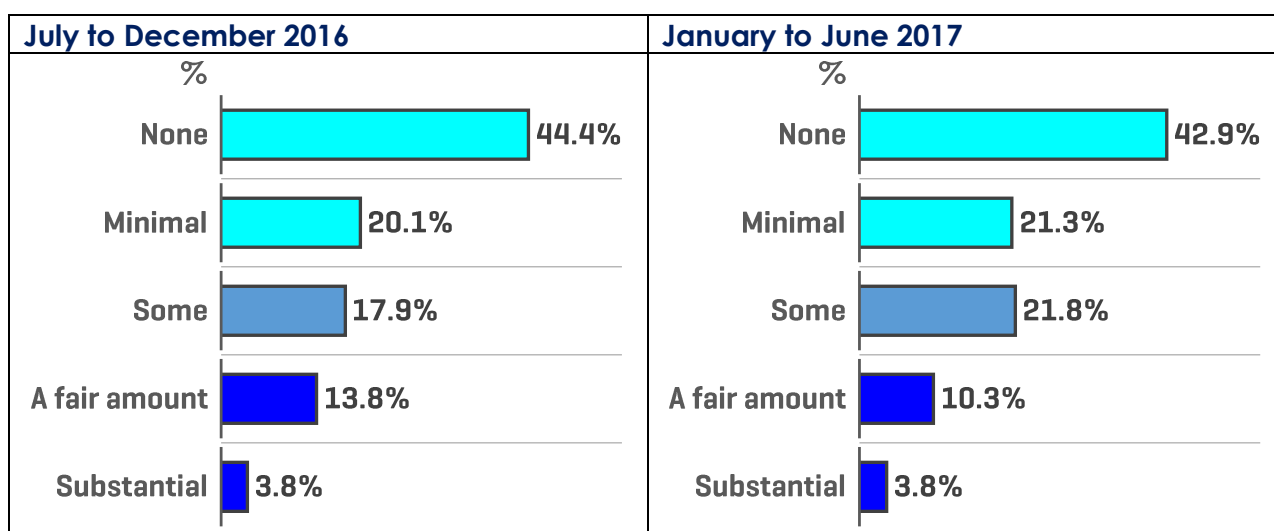
Key Results:

- Spending on capital for the January to June, 2017 period was similar across the three LGAs.

3.4 Amount of Overtime

Question: *The following question relates specifically to how you see your business has performed for the preceding period (July to December, 2016) and how it is performing in the current period (January to June, 2017)?*

Graph 3.4.1: Amount of overtime



Graph 3.4.1a: Amount of overtime – Index comparison

Overtime	Actual	Expected
2014	24	27
2017	36	36

Legend:

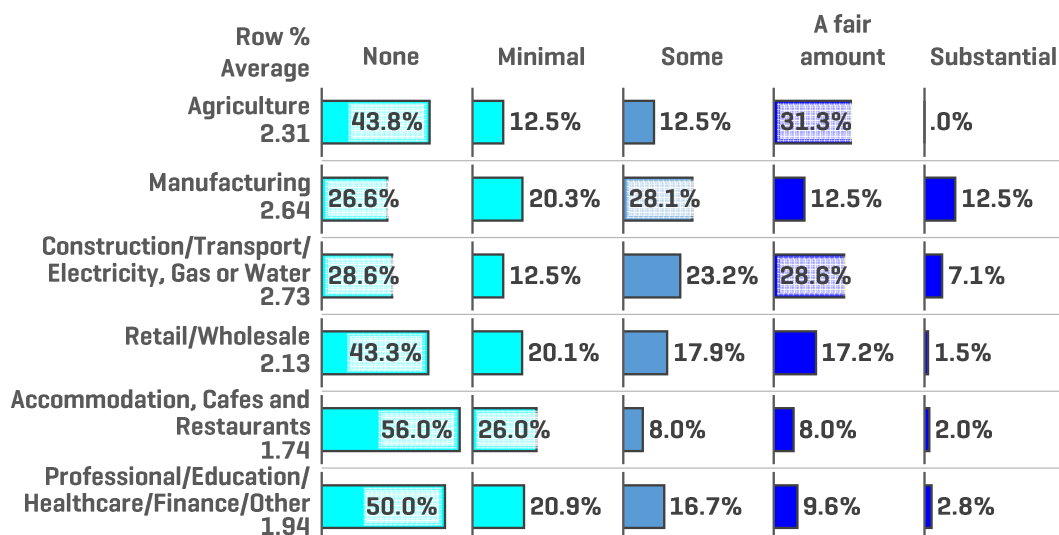
	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported at least 'some' available or expected overtime.

Key Results:

- During the six months to December 2016, more than a third of businesses (35.5%) indicated they were busy enough to have 'at least some' overtime work available for employees. This is a substantial increase from the 24.1% reporting it in 2014.
- Overtime is expected to remain on par for the six months to June 2017.
- Both the reported and expected overtime are higher in this round of reporting than they were in the comparable periods in 2014.

Graph 3.4.2: Actual amount of overtime by industry type – July to December, 2016



Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have reported their level of overtime. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.4.2: Actual amount of overtime by industry type – Index comparison

Overtime	Agriculture	Manufac.	Construct.	Retail/W	Accomm.	Profess.
2014	50	38	40	21	9	22
2017	44	53	59	37	18	29

Legend:

	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported at least 'some' available overtime.

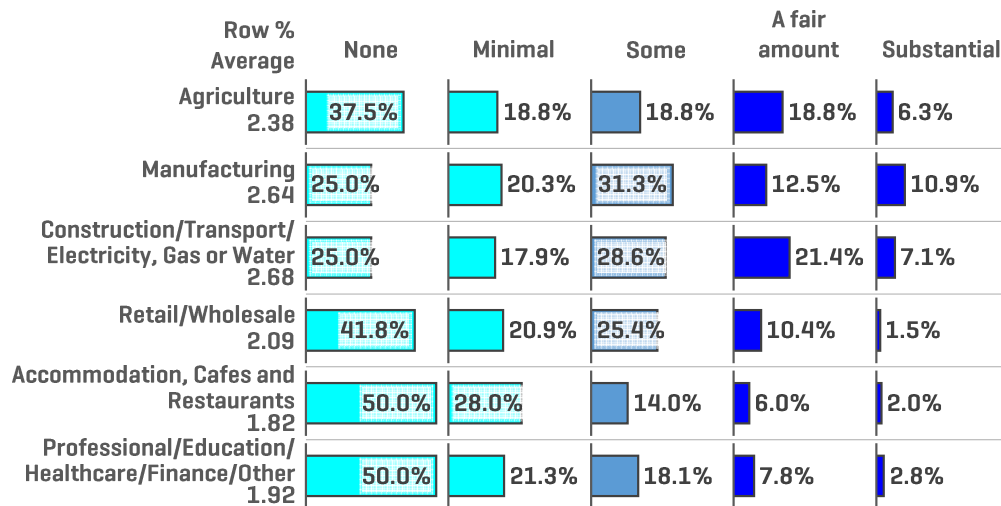
Key Results:

- Businesses in the 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' sector reported having the most overtime available ('A fair amount' and 'Substantial') in the six months to December 2017 at 35.7%.
- Half of the businesses within the 'Accommodation, Cafés and Restaurants / Arts & Recreation' sector (56.0%) and the 'Professional, Education, Healthcare, Finance and Other' sector (50.0%), indicated that they had no overtime available during this period which is a significantly improved result from the January to June 2014

period where more than three in five these businesses (66% and 61% respectively) reported no available overtime.

- Businesses in the 'Manufacturing', Accommodation, Cafés and Restaurants / Arts and Recreation', Construction / Transport, Postal and Warehousing / Electricity, Gas or Water', 'Retail / Wholesale' and 'Professional / Education / Healthcare / Finance and Other Services' sectors all reported higher levels of available overtime when compared to 2014.

Graph 3.4.3: Expected amount of overtime by industry type – January to June, 2016

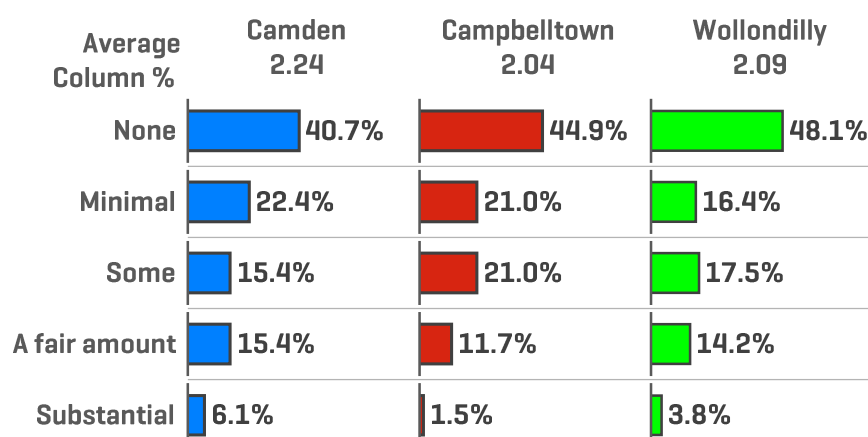


Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have reported their expected level of overtime. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- Half of the businesses in the 'Accommodation, Cafés and Restaurants / Arts & Recreation' (50.0%), and the 'Professional, Education, Health Care, Finance and Other' (50.0%) indicated they expect to have no overtime available for the period January to June 2017.
- Figures show that expectations are highest for the 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' (28.5%) and the 'Manufacturing' (23.8%) sectors ('A fair amount' and 'Substantial') for the six months to June 2017.

Graph 3.4.4: Actual amount of overtime by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have reported their level of available overtime. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.4.4a: Actual amount of overtime by area – Index comparison

Overtime	Camden	Campbelltown	Wollondilly
2014	29	19	29
2017	37	34	36

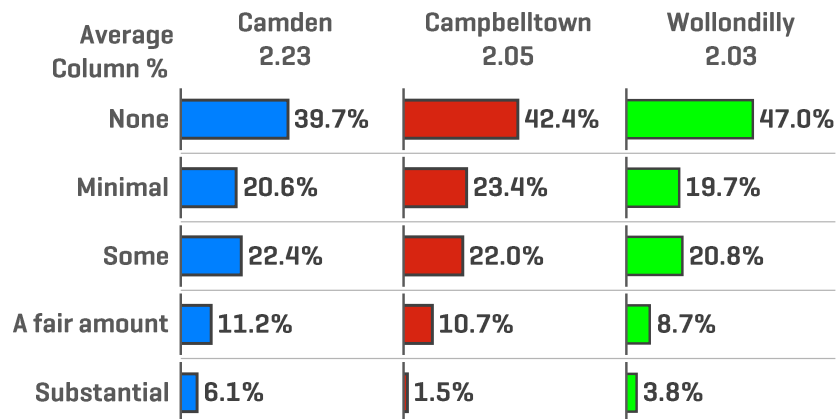
Legend:	 2017 Statistically higher than 2014
	 2017 Statistically lower than 2014
	 No Statistical difference

Note: The index is the percentage of businesses that reported at least 'some' available overtime.

Key Results:

- Businesses in the Camden LGA had the most overtime available for workers with one in five (21.5%) recording they offered either 'a fair amount' (15.4%) or a 'substantial amount' (6.1%) during the July to December 2016 period.
- Businesses in Camden, Campbelltown and Wollondilly areas all reported higher levels of overtime when compared to 2014.

Graph 3.4.5: Expected amount of overtime by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have reported their expected level of available overtime. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

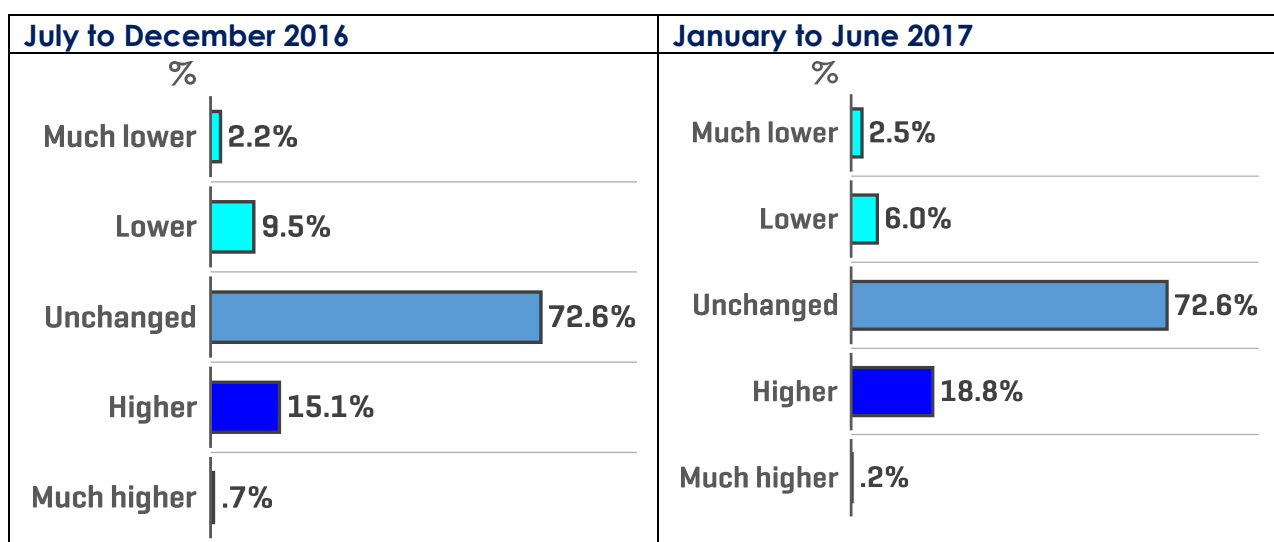
Key Results:

- Nearly half of the businesses in the Wollondilly LGA expect to have no overtime available in the six months to June 2017.

3.5 Employment Levels

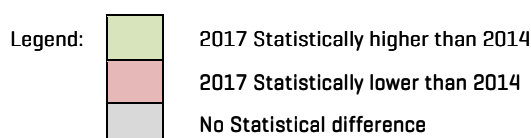
Question: The following question relates specifically to how you see your business has performed for the preceding period (July to December, 2016) and how it is performing in the current period (January to June, 2017)?

Graph 3.5.1: Staffing levels



Graph 3.5.1a: Staffing levels – Index comparisons

Employment Levels	Actual	Expected
2014	5	14
2017	4	11



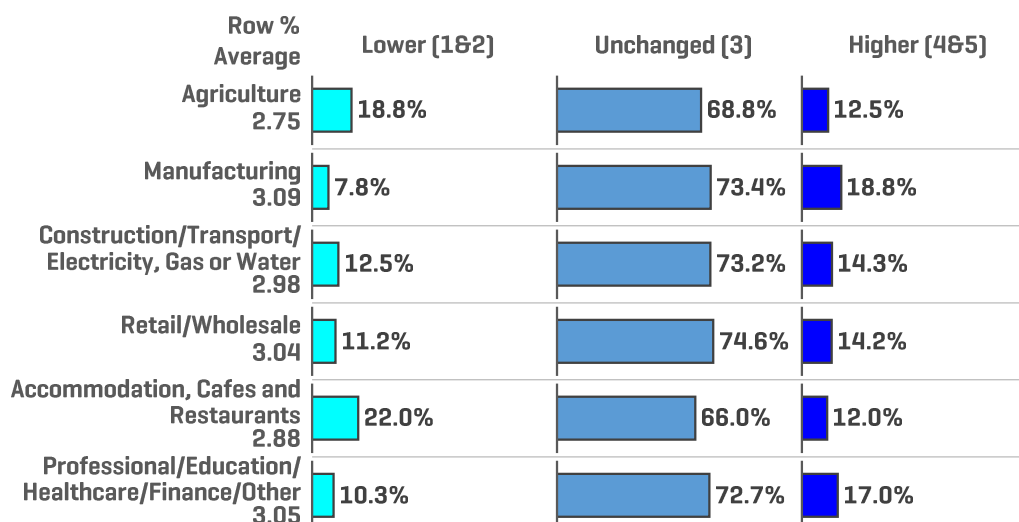
Note: The index is the difference in the number of businesses that reported or expected higher staffing levels less those that reported or expected lower staffing levels.

Key Results:

- Results showed that 15.8% of businesses experienced higher staffing levels in the six months from July to December 2016. Seven in ten businesses (72.6%) registered no change in staffing levels. Comparatively 11.7% indicated that staffing levels were lower. The numbers are on par with the 2014 results.
- Overall, 19.0% of businesses are expecting staffing levels to be higher or much higher during the current January to June 2017 period while seven in ten expect staffing levels to remain unchanged.

- There is no statistically significant difference in either reported or expected staffing levels when compared to 2014.

Graph 3.5.2: Actual staffing levels by industry type – July to December, 2016



Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have reported their staffing levels. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.5.2a: Actual staffing levels by industry type – Index comparisons

Employment Levels	Agriculture	Manufac.	Construct.	Retail/W	Accomm.	Profess.
2014	-50	0	-3	2	3	9
2017	-6	11	2	3	-10	7

Legend:

	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

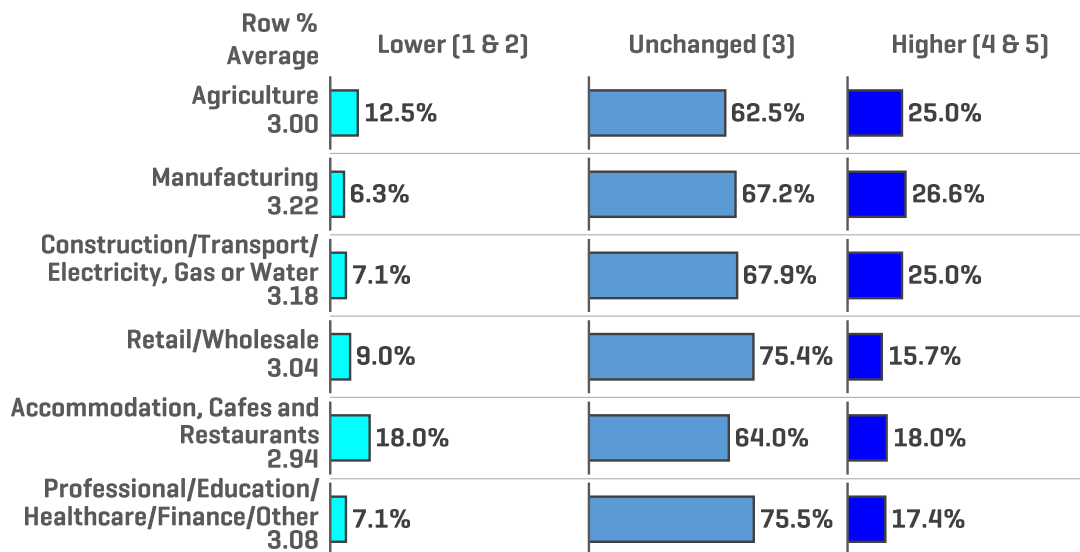
Note: The index is the difference in the number of businesses that reported higher staffing levels less those that reported lower staffing levels.

Key Results:

- Businesses in the 'Accommodation, Cafes and Restaurant' sector reported a fall in employment levels with 22.0% reporting lower levels of employment against 12.0% reporting higher levels.

- Businesses in the 'Manufacturing' sector reported a significant rise in staffing levels with 18.8% reporting higher levels against 7.8% reporting lower levels.
- Businesses in the 'Accommodation, Cafes and Restaurant' sector reported substantial lower staffing levels when compared to 2014 while those businesses in the 'Manufacturing' sector reported a significant rise.

Graph 3.5.3: Expected staffing levels by industry type – January to June, 2017

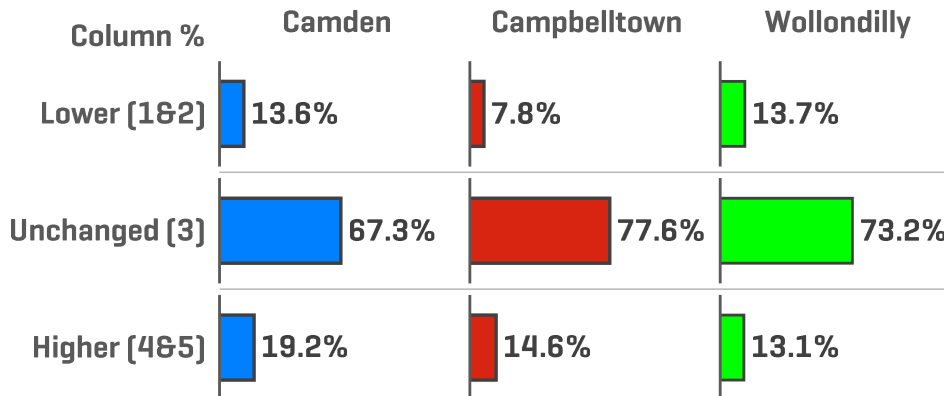


Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score the more positively the businesses have reported their expected staffing levels. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- Expectations surrounding staffing were most positive amongst businesses in the 'Manufacturing' (26.6%) and 'Construction/Transport/ Electricity, Gas or Water' (25.0%) sectors.
- Expectations regarding staffing levels for businesses across all five (5) sectors during the current period are positive with more businesses expecting higher levels of employment than those that expect employment to be lower.

Graph 3.5.4: Actual staffing levels by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have reported their level of staffing. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Graph 3.5.4a: Actual staffing levels by area – Index comparisons

Employment Levels	Camden	Campbelltown	Wollondilly
2014	9	1	9
2017	6	7	1

Legend:

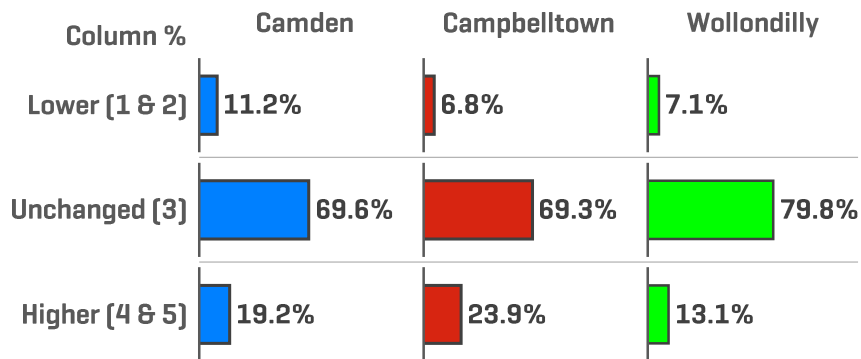
- 2017 Statistically higher than 2014
- 2017 Statistically lower than 2014
- No Statistical difference

Note: The index is the difference in the number of businesses that reported higher staffing levels less those that reported lower staffing levels.

Key Results:

- Camden LGA returned the most positive result with 19.2% of businesses reporting higher staffing levels against 13.6% reporting lower levels.
- Across the three LGAs, the majority of businesses reported no change in staffing levels.
- Businesses in the Campbelltown LGA reported higher staffing levels than in 2014 while Wollondilly reported lower levels.

Graph 3.5.5: Expected staffing levels by area



Note: The number below the name of each LGA is an average rating score out of 5. The number is included to allow comparisons between LGAs. The higher the score the more positively the businesses have reported their expected level of staffing. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

Key Results:

- Businesses in the Campbelltown LGA are most optimistic about increased staff levels in the current period with 23.9% expecting higher levels against 6.8% expecting them to be lower.

Table 3.5.1: Net Scores – Staffing

	Jan – June 2014 Net Score	July – Dec 2014 Net Score	July – Dec 2016 Net Score	Jan - Jun 2017 Net Score	Improve (+) or Worsened (-)
Overall	5	14	4	11	+7
Accommodation, Cafés and Restaurants / Arts and Recreation	3	11	-9	3	+12
Construction / Transport, Postal and Warehousing / Electricity, Gas or Water	-3	11	2	18	+16
Retail / Wholesale	2	5	3	7	+4
Manufacturing	0	10	13	19	+6
Professional / Education / Healthcare / Finance and Other Services	9	15	7	10	+3
Agriculture	-50	50	6	12	6

Key Results:

- Table 3.5.1 demonstrates that all sectors with the exception of 'Accommodation, Cafés and Restaurants / Arts and Recreation' (-9 points) recorded positive results for the July to December, 2016 period.
- All industries are expecting an improvement in net scores during the current period (January to June, 2017).
- Industries with the largest expected improvements include 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' (+16 points) and 'Accommodation, Cafés and Restaurants / Arts and Recreation' (+12 points).
- The biggest expected turnaround in employment levels since the 2014 measure is in the 'Construction / Transport, Postal and Warehousing / Electricity, Gas or Water' sector with a move in the index from -3 to +16.

3.6 Key Indicator Comparisons with other Areas

Table 3.6.1: Overall comparisons

Survey Indicator	MACROC 2017	MACROC 2014	Australia	Illawarra March 2017
Profitability	+13	+7	+11	+6
Trading conditions	+34	+27	+13	+23
Capital expenditure	46.8%	34%		45%
Overtime provided	35.5%	44.7%		40%

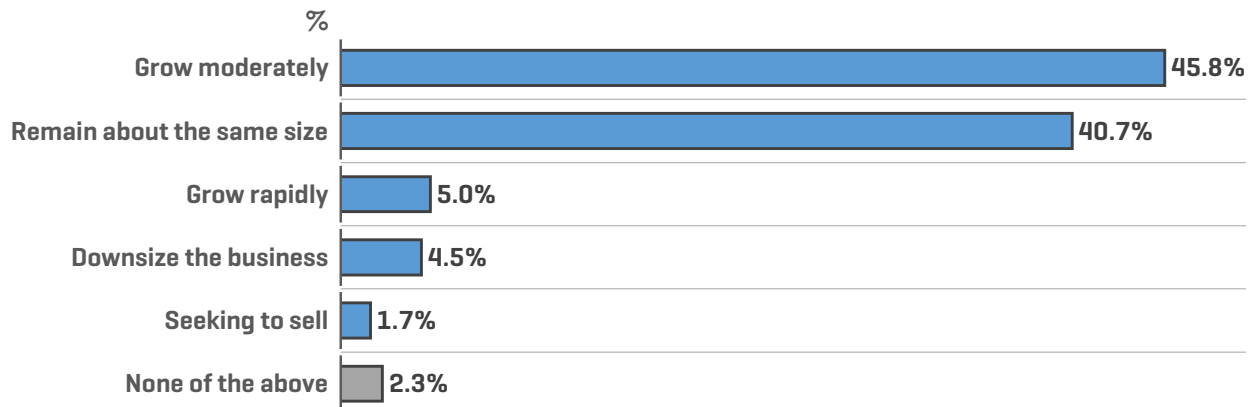
Key Results:

- Profitability in MACROC was higher than the Australia average and the Illawarra region and above the 2014 result.
- Trading conditions in MACROC are also higher than the Australia average and the Illawarra region, and above the 2014 result.
- MACROC also recorded a relatively high level of capital expenditure, with 46.8% of businesses indicating that they had made at least some expenditure on capital, substantially higher than the result recorded in 2014 and on par with that recorded for the March 2017 Illawarra Business Survey.

4.1 Business Objective

Question: Which one of the following best describes your business's objectives for the past six months?

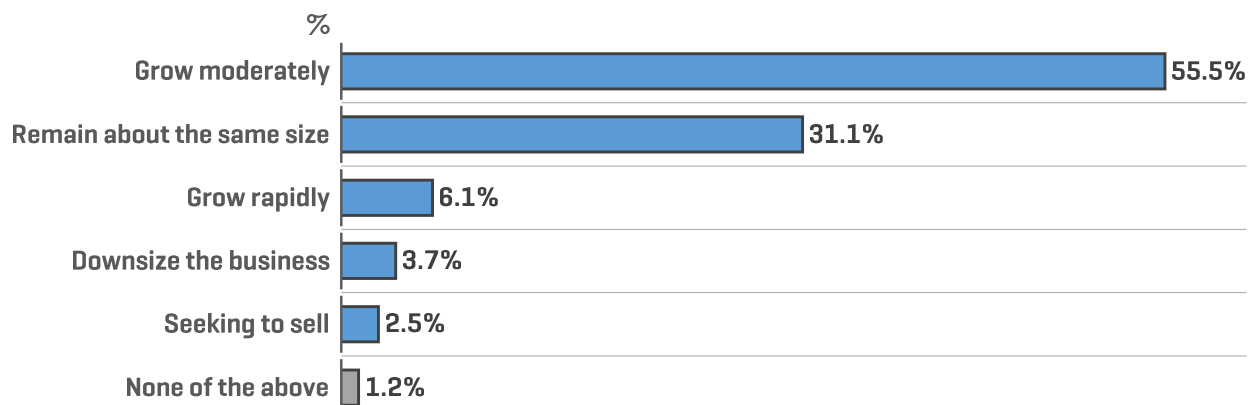
Graph 4.1.1: Business Objective (n=602)



Key Results:

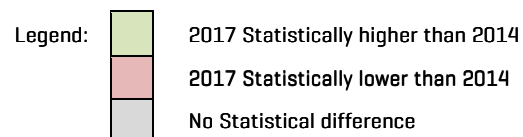
- More than half of the businesses surveyed (50.8%) indicated that they intended to 'Grow rapidly' (5.0% : 8.9% in 2014) or 'Grow moderately' (45.8%: 42.7% in 2014) as the option that best describes their business objectives during the past six months.
- Fewer businesses (40.7%) chose the option of 'remain about the same size'.
- These results are statistically unchanged from 2014.

Graph 4.1.2: Business objectives for the next six months (n=602)



Graph 4.1.2a: Business objectives – Intention to grow – Index comparison

Intention to grow	Past 6 Months	Next 6 months
2014	52	61
2017	51	62

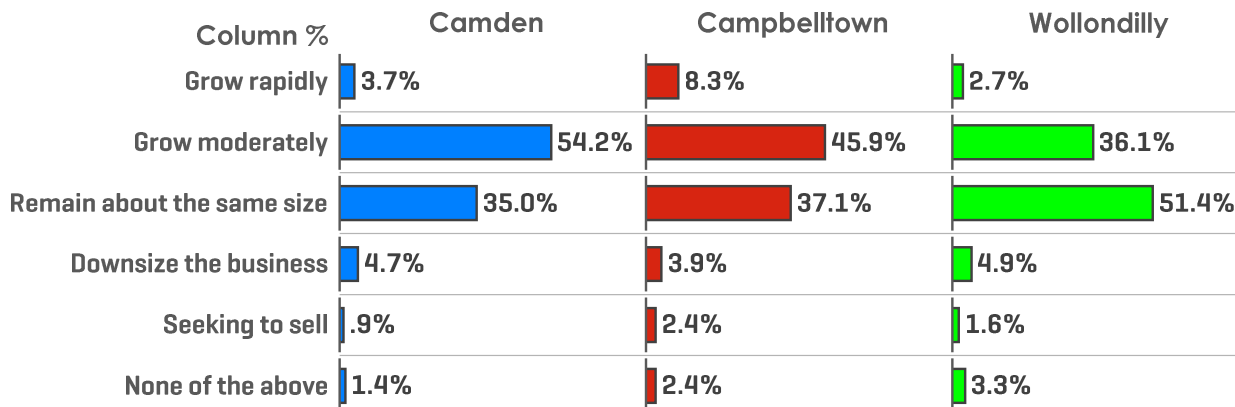


Note: The index is the percentage of businesses that reported that their business objective was to grow.

Key Results:

- More than half of the businesses surveyed (55.5%) chose ‘grow moderately’ as the option that best describes their business objectives for the next six months.
- A third of businesses (31.1%) chose the option of ‘remain about the same size’ while a further 6.1% indicated that they would like to ‘grow rapidly’.
- These intentions are very much in line with the sentiments expressed in 2014.

Graph 4.1.3: Business objectives by area (n=602)



Graph 4.1.3: Business objectives by area – Index comparison

Intention to grow	Camden	Campbelltown	Wollondilly
2014	52	53	47
2017	58	54	39

Legend:

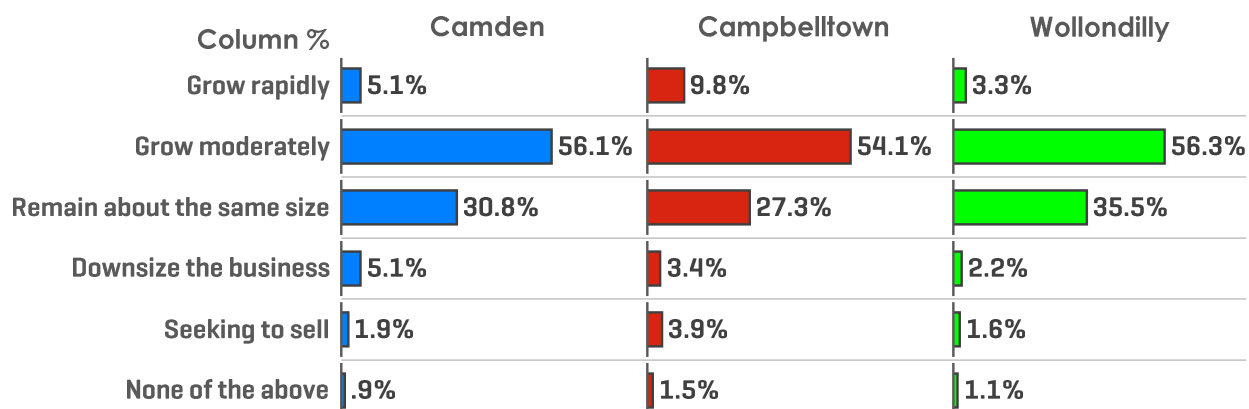
	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported that their business objective was to grow.

Key Results:

- Businesses in the Camden and Campbelltown LGAs expressed a greater appetite for growth than their Wollondilly counterparts with respectively 57.9% and 54.2% of businesses indicating that their business goal had been to grow either rapidly or moderately as opposed to the 38.8% of Wollondilly businesses that expressed the same sentiment.
- Fewer businesses in the Wollondilly LGA reported that growth was their business objective compared to 2014.

Graph 4.1.4: Business objectives for the next six months by area



Graph 4.1.4: Business objectives for the next six months by area – Index comparison

Intention to grow	Camden	Campbelltown	Wollondilly
2014	57	63	61
2017	61	64	60

Legend:

	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported that their business objective was to grow.

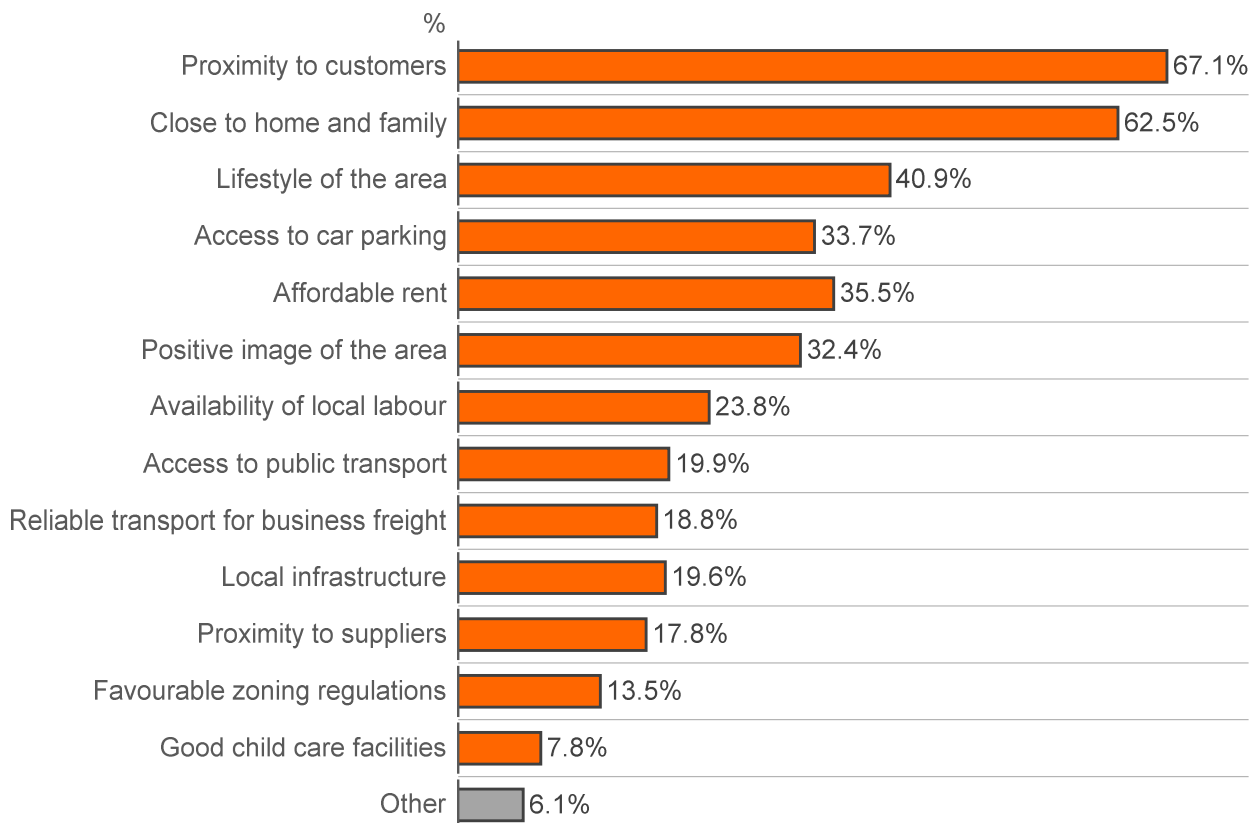
Key Results:

- Around three in five businesses in each of the three LGAs intend to grow either rapidly or moderately in the period January to June, 2017.
- There is no statistical difference for any of the three LGAs between the 2014 and the 2017 findings.

5.1 Current Location

Question: Which of the following do you believe are the main advantages of operating your business in its current location?

Graph 5.1.1: Advantages of operating in current location (n=602)

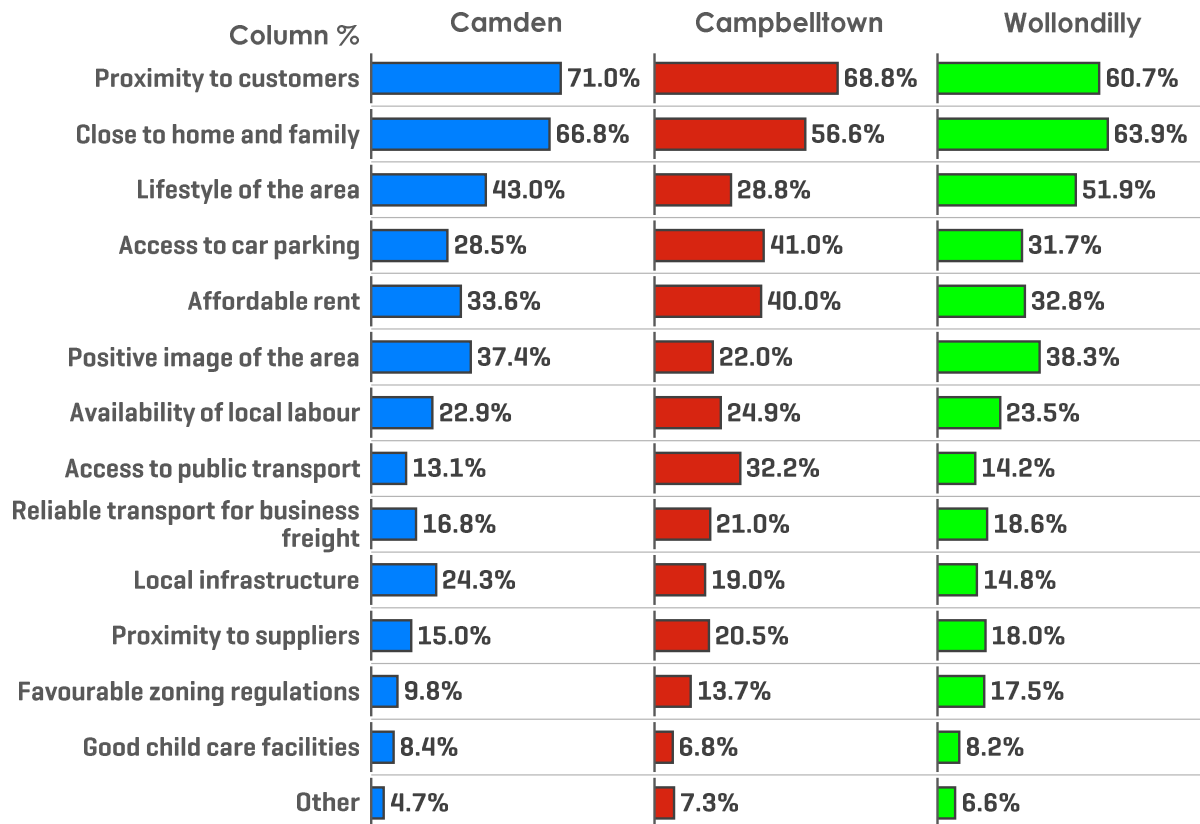


Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- Two in three businesses surveyed (67.1%) believed that 'proximity to customers' was the main advantage of operating their business in its current location.
- This was closely followed by 'close to home and family' (62.5%) and 'Lifestyle of the area' (40.9%) as the main advantage of the businesses current location.
- The same top three were listed in 2014.

Graph 5.1.2: Advantages of operating in current location by Area (n=602)



Note: Total will not add up to 100% as some respondents have selected more than one answer

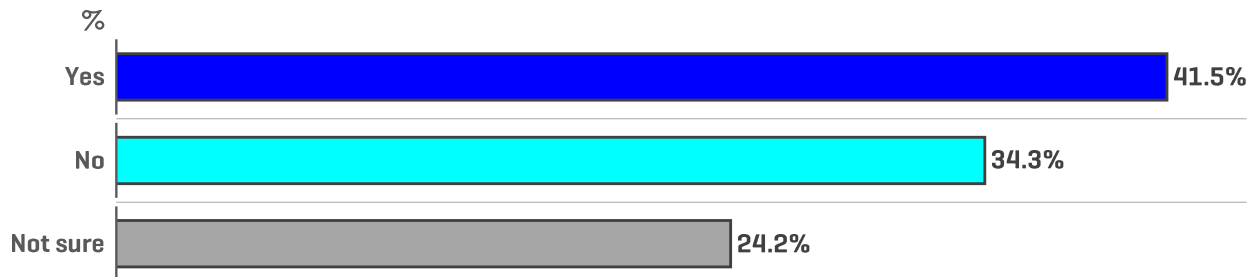
Key Results:

- Results showed that the advantages of operating in the current location were similar amongst each of the three LGA's. There were however significantly more businesses in the Campbelltown LGA that mentioned 'access to public transport' and 'proximity to suppliers'. This was also the case in 2014.
- Businesses in Campbelltown LGA were also least likely to state 'lifestyle of the area' and 'positive image of the area' as advantages of operating in the current location. This result was also noted in 2014.

6.1 Business Expansion

Question: *Is the business considering expansion in the next two years?*

Graph 6.1.1: Business expansion (n=602)



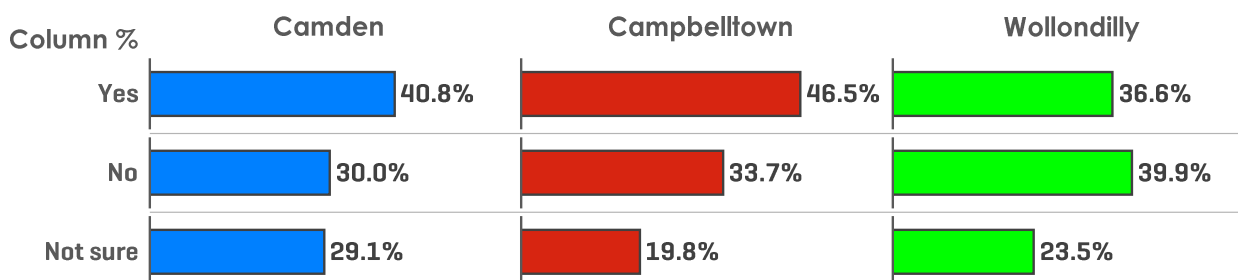
Key Results:

- When businesses were asked whether they are considering expansion in the next two (2) years, over four in ten (41.5%) indicated that they are. This is statistically on par with the 37.9% of businesses that indicated that they were considering expansion in 2014.

6.2 Business Expansion by Area

Question: *Is the business considering expansion in the next two years?*

Graph 6.2.1: Business expansion by area (n=602)



Graph 6.2.1a: Business expansion by area – Percentage considering

Considering Expansion	Overall %	Camden %	Campbelltown %	Wollondilly%
2014	38	34	41	38
2017	42	41	47	37

Legend:

	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported that they were considering expansion in the next two years.

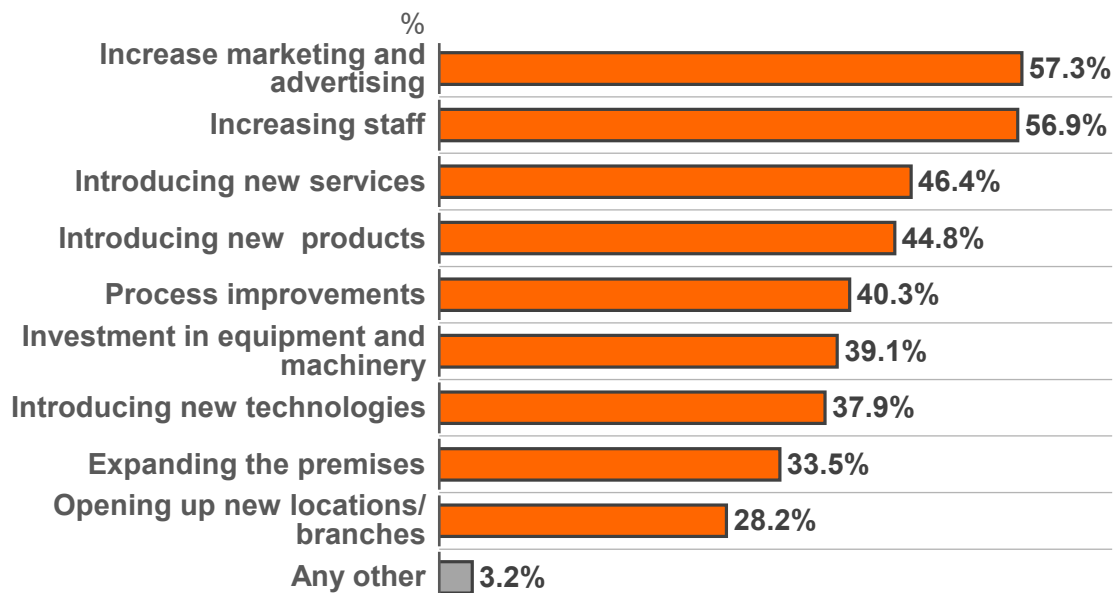
Key Results:

- Businesses located in the Campbelltown LGA were most likely to be considering expansion with slightly less than half (46.5%) indicating expansion was on the table.
- Businesses in the Camden and Campbelltown LGAs are more likely to be considering expansion than they were in 2014.

6.3 Expansion Planning

Question: Which of the following activities are you planning?

Graph 6.3.1: Activities being planned (n=248)



Note: Total will not add up to 100% as some respondents have selected more than one answer

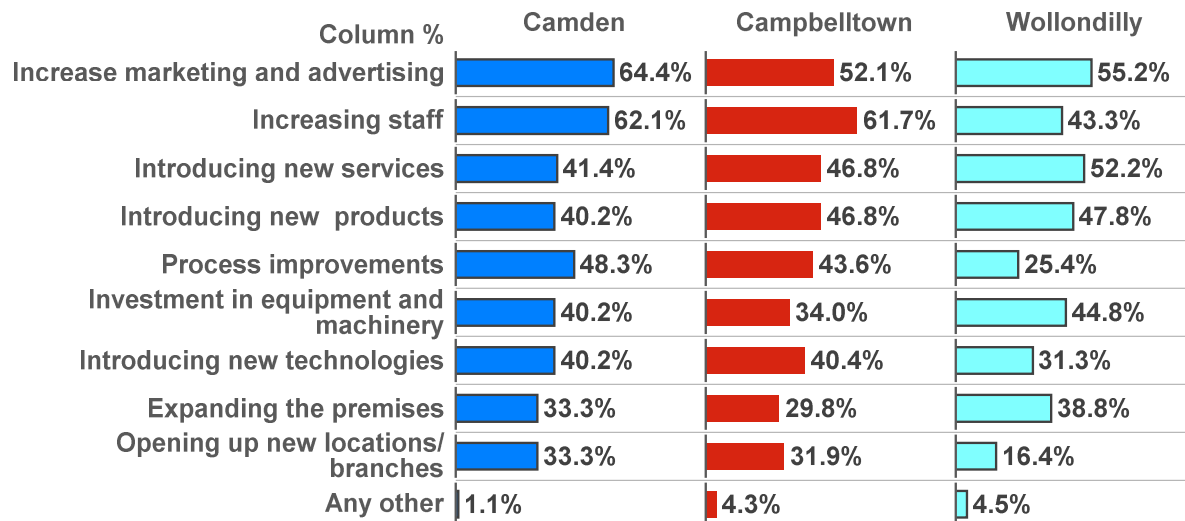
Key Results:

- When asked what activities businesses have planned for expansion, almost three in five businesses (57.3%) chose 'Increasing marketing and advertising'.
- Almost as many businesses (56.9%) indicated 'Increasing staff' as an option for expansion planning. This was the top option in 2014.
- In 2014 the top activities mentioned were 'Increasing staff', 'Increasing marketing and advertising' and 'Introducing new technologies'.

6.4 Expansion Planning by Area

Question: Which of the following activities are you planning?

Graph 6.4.1: Activities being planned (n=248)



Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- Businesses in the Camden LGA were more likely to be considering 'Increasing marketing and advertising' as a means to expansion.
- Businesses located in Campbelltown were less likely to 'Expand the premises' or 'Invest in equipment and machinery' as means to expansion.

7.1 Factors Affecting Future Growth

Question: Please rate your level of concern with the following factors on future growth?

Table 7.1.1: Factors Affecting Future Growth (n=602)

	Row % Average	1 Not at all concerned	2	3	4	5. Very concerned
The economy	3.39	11.0%	13.0%	26.7%	24.7%	24.5%
Rising overheads	3.30	13.6%	13.3%	24.3%	26.9%	21.9%
Energy costs	3.25	15.8%	13.6%	24.2%	22.3%	24.1%
Price pressure from competitors	3.14	17.6%	14.4%	24.3%	24.3%	19.4%
Access to fast broad band services	3.07	22.6%	15.4%	19.7%	16.6%	25.7%
Price pressure from customers	2.99	17.3%	18.5%	27.0%	22.1%	15.1%
Cash flow	2.96	20.5%	17.9%	24.9%	18.8%	17.9%
Price pressure from suppliers	2.83	21.2%	19.8%	25.0%	22.6%	11.5%
State and Federal regulations	2.83	28.4%	14.8%	21.0%	17.1%	18.7%
Identifying new customers	2.79	23.4%	18.6%	27.5%	16.3%	14.2%
Lack of skilled staff	2.73	31.1%	15.5%	19.4%	17.4%	16.7%
High rent	2.62	35.6%	13.7%	18.7%	17.3%	14.7%
Local Council regulations	2.61	33.9%	16.6%	20.3%	12.8%	16.4%
Marketing	2.59	26.1%	20.7%	29.7%	15.5%	8.1%
Crime in the area	2.55	27.2%	22.9%	27.2%	13.1%	9.5%
Competition from cheap imports	2.49	44.2%	12.4%	12.6%	11.9%	18.8%
The image of the local area	2.40	35.3%	20.0%	23.4%	11.6%	9.7%
Competition from on-line sellers	2.31	46.0%	15.0%	13.8%	12.0%	13.1%
Personal / Home pressures	2.30	37.0%	20.2%	24.6%	11.9%	6.2%
Achieving the required standards	2.27	37.5%	25.5%	18.2%	10.4%	8.5%
High Australian dollar	2.23	40.0%	21.8%	20.2%	11.3%	6.8%
Availability of finance.	2.22	39.8%	20.4%	22.8%	11.6%	5.4%
Planning process	2.17	45.1%	19.9%	17.8%	7.5%	9.7%
Your product range	2.17	37.5%	26.3%	22.7%	9.0%	4.5%
Lack of suitable premises	2.04	50.8%	17.3%	15.0%	10.5%	6.4%
Transport/freight access	1.91	53.4%	20.0%	15.8%	4.5%	6.4%

Note: The number below each industry classification is an average rating score out of 5. The number is included to allow comparisons between different sectors. The higher the score, the more businesses are concerned that each factor will impact future growth. To be statistically significant there needs to be at least a 0.2 difference between any two average scores.

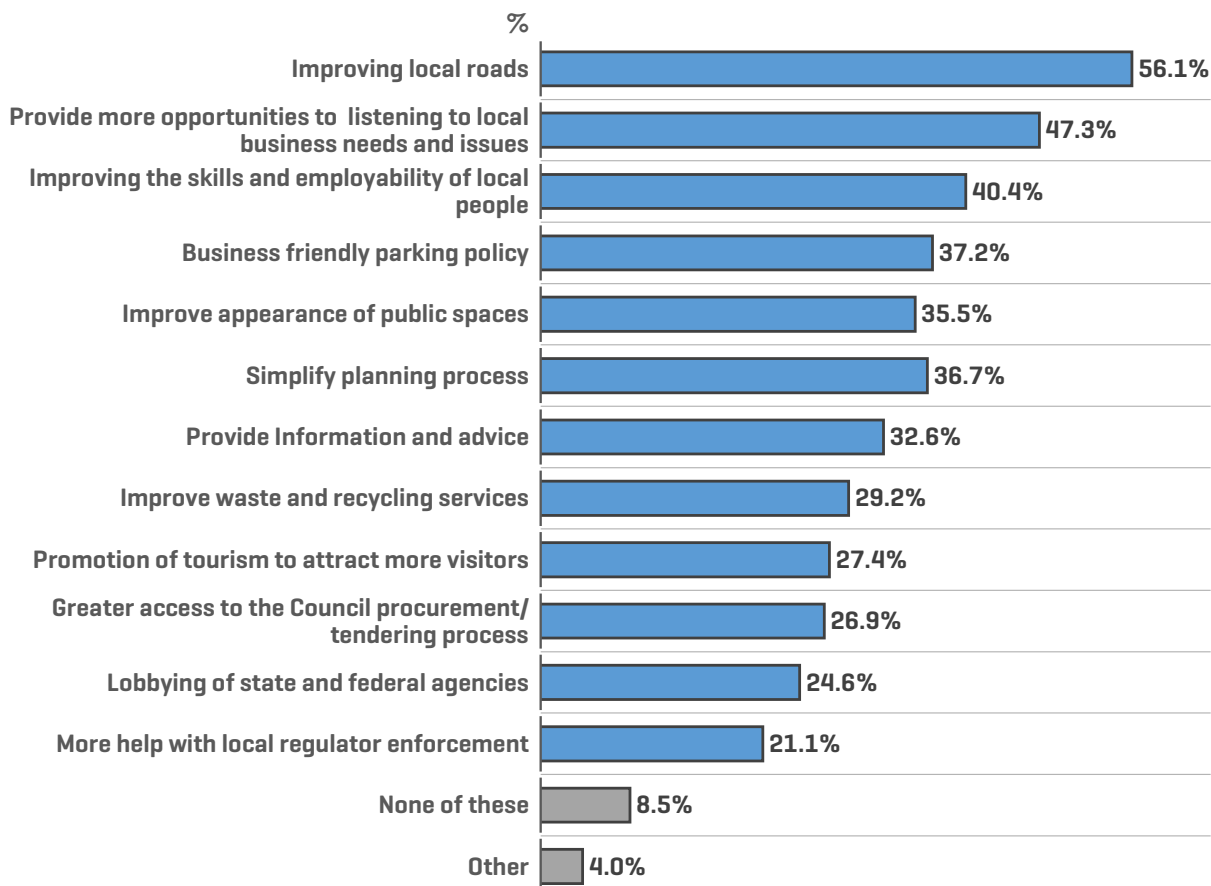
Key Results:

- 'Access to fast broadband services' has been identified as being a major concern by 25.7% of respondents. Closer examination would probably identify those businesses as ones without access to fast broadband. This highlights just how significant this essential service is to regional business.
- 'The Economy' was highlighted as being the main factor influencing the future growth of businesses with almost a quarter of businesses (24.5%) stating they were 'extremely concerned'. This is on par with the 2014 result.
- 'Energy costs' (24.1%), 'Rising overheads' (21.9%) and 'Price pressures from competitors' (19.4%) were also mentioned as issues of major concern. These all featured highly in 2014.

8.1 Council Initiatives

Question: Which of the following Council initiatives would most support your business?

Graph 8.1.1: Council Initiatives to Support Your Business (n=602)

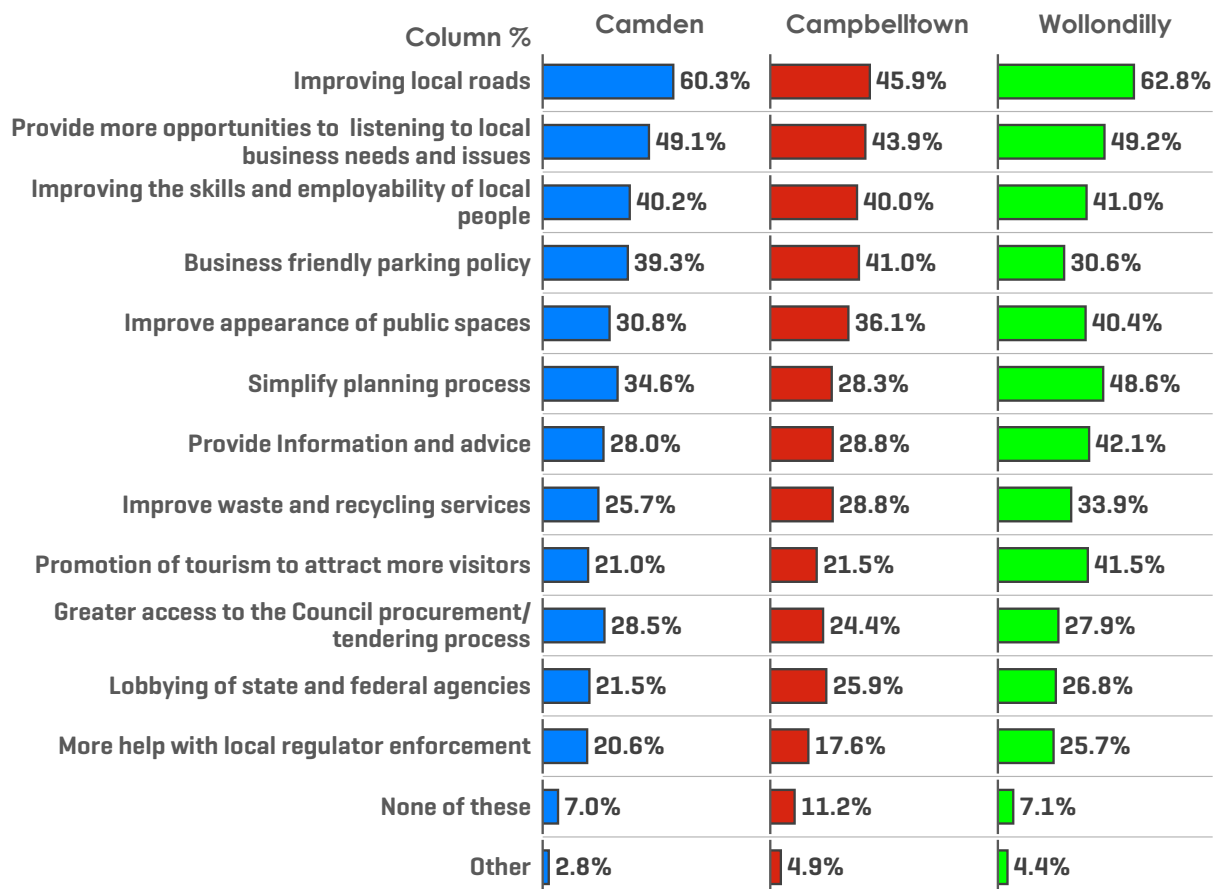


Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- When businesses were asked which Council initiatives would most support their business, the most popular response at 56.1% was 'Improving local roads'.
- Almost as popular was to 'Provide more opportunities to listen to local business needs and issues' at 47.3% followed by 'Improving the skills and employability of local people' at 40.49%.
- These three were also the most popular options in 2014.

Graph 8.1.2: Council Initiatives to Support Your Business by Area (n=602)



Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- Wollondilly businesses identified 'promotion of tourism to attract more visitors' and 'simplify planning process' as higher priorities than those in Camden or Campbelltown and placed less emphasis on 'business friendly parking policy'.
- Businesses in Campbelltown LGA placed less importance on 'improving local roads'.

9.1 Relocation

Question: Do you plan to relocate your business outside your local area in the next two (2) years?

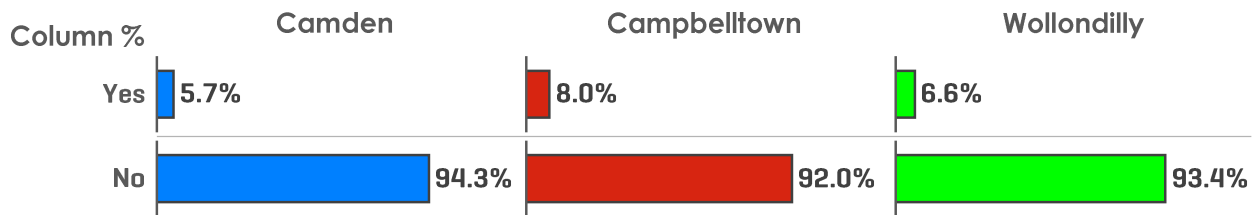
Graph 9.1.1: Relocation (n=602)



Key Results:

- When businesses were asked if they plan to relocate their business outside the local area in the next two (2) years the overwhelming majority (93.2%) responded no, while 6.8% of businesses said yes. This is comparable to the 2014 result of 92.1% who responded no.

Graph 9.1.2: Relocation by area



Graph 9.1.2a: Relocation by area – Comparison % considering

Considering Relocation	Overall %	Camden %	Campbelltown %	Wollondilly %
2014	7	7	8	3
2017	7	6	8	7

Legend:

	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported that their business objective was to grow.

Key Results:

- The vast majority of businesses in each of the three (3) LGAs said they were not planning on relocating their business outside their local area within the next two (2) years.
- There is no significant difference in the response from the three LGAs.
- Businesses across the three LGAs are just as likely to be considering relocation now as they were in 2014.

9.2 Reasons for Relocation

Question: *Why are you planning relocation?*

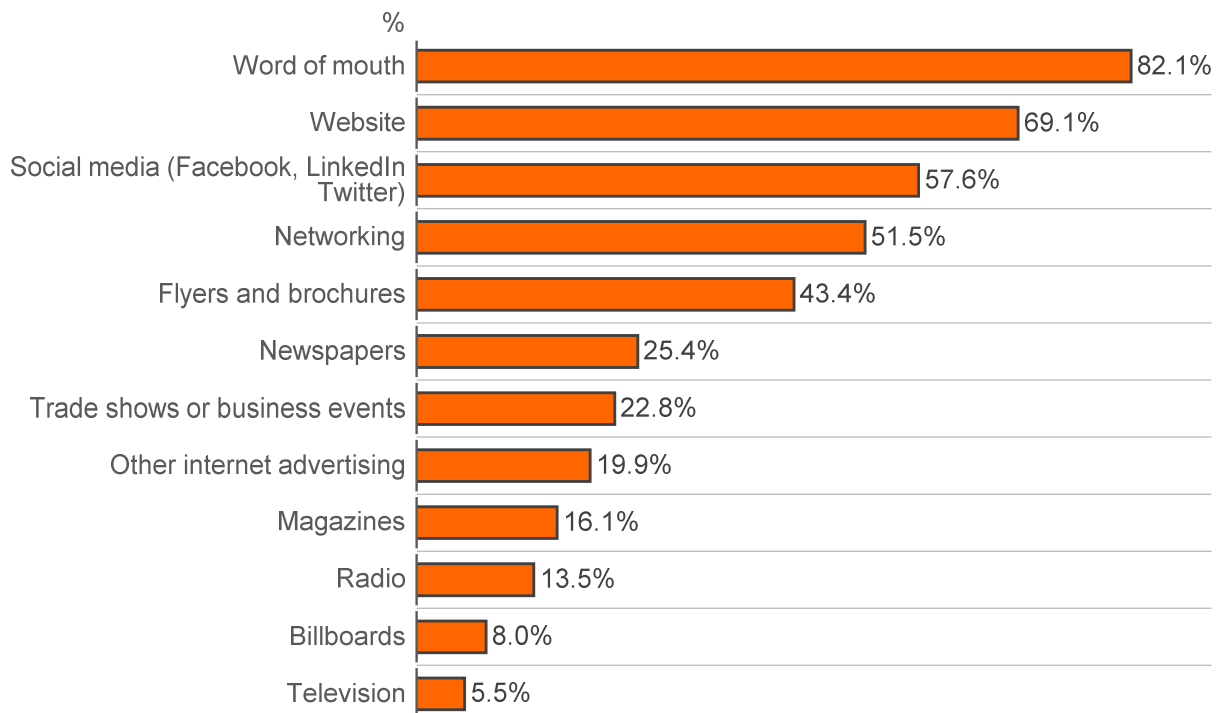
Below is a list of verbatim responses from businesses outlining the reasons why they are planning to relocate.

- Tahmoor Colliery has announced its closure
- Bigger premises. out of state - less Government tax
- Closer to Clients
- Cost of rent and trying to get out of the car park in Warren Service Way is a Joke /specially between 3.30 to 5-30
- Costs
- Due to redevelopment of present location
- Find cheaper land/rent
- For office upgrade
- High rent and too many of the same business's in area
- Lack of mid/large business in the area
- Lack of support
- Lifestyle
- Liverpool/Fairfield and I have offices opening Central West NSW also
- Local area is unstimulating and limited in exposure. Suburbs breed 9-5 and shopping centre Mentality. 40yrs - bored
- More suitable premises
- Moving to a new area
- Multi sites
- Need better premises
- Need bigger premises and freight costs
- Need larger site
- Needed new office
- Needed room to expand
- Moving to New Zealand
- Moving north
- Once expanded will need workshop reception
- Position closer to City
- Profit margin, number of skilled workers in the area
- Purchased as rent too high
- Rent too high
- Multiple reasons
- Expanding to Singapore
- The business is bad
- The construction of the mall on our business caused a huge impact
- The lack of decent road system in and out of the industrial area of Picton. Council harassment over regulations
- To improve business opportunities
- Where there is new development

10.1 Promotion and Marketing

Graph 10.1.1: Methods to Promote or Market your Business (n=602)

Question: *By what methods do you promote or market your business?*



Note: Total will not add up to 100% as some respondents have selected more than one answer

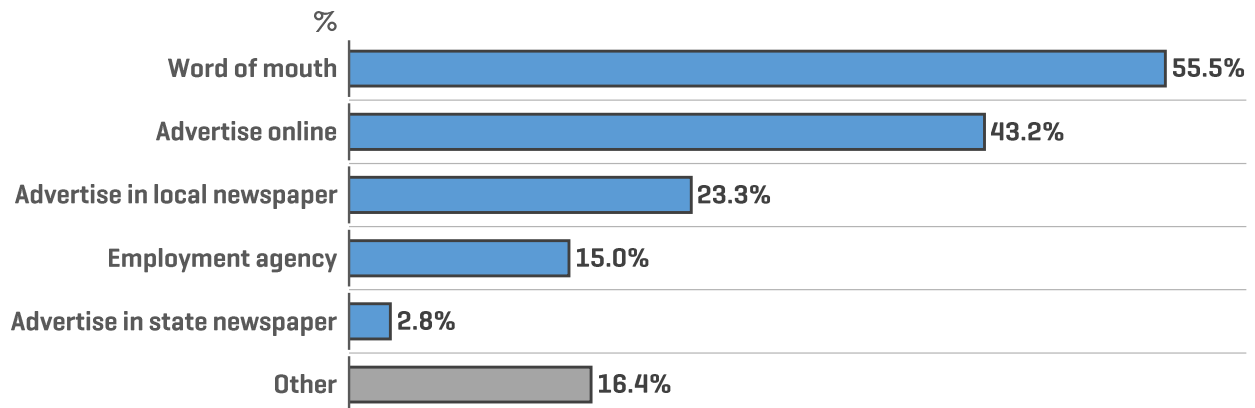
Key Results:

- When businesses were asked what methods they use to promote or market their business, more than four in five businesses (82.1%) indicated 'word of mouth'.
- The three (3) most popular methods after 'word of mouth' included 'Website' (69.1%), Social media (57.6%) and 'Networking' (51.5%).
- These were also the most frequently mentioned in 2014.

11.1 Staff Recruitment

Question: *How do you normally recruit staff?*

Graph 11.1.1: Staff Recruitment



Note: Total will not add up to 100% as some respondent's may have selected more than one answer

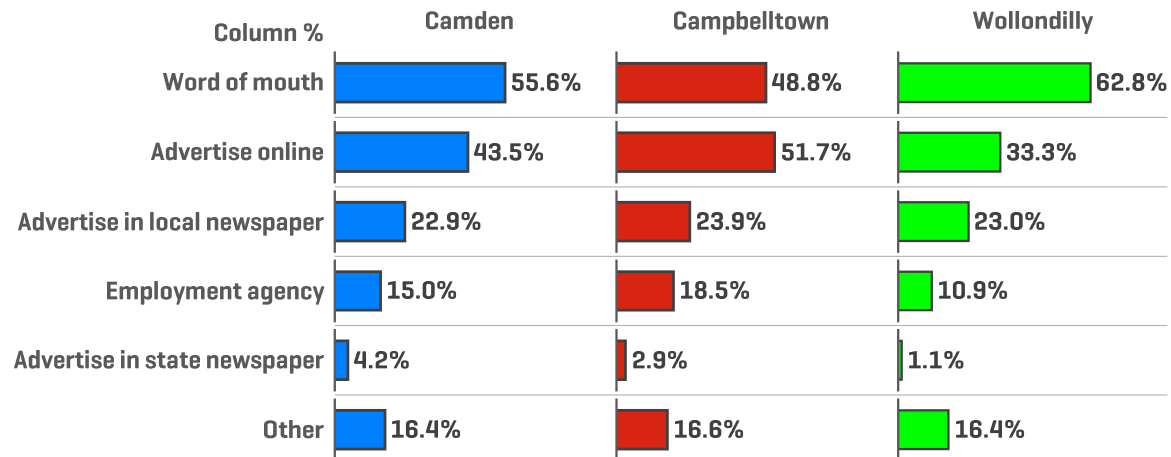
Key Results:

- When businesses were asked how they normally recruit staff the most popular answer at 55.5% was 'word of mouth'.
- One in three businesses (43.2%) selected the option of 'Advertise online' while just over in four businesses (23.3%) chose 'advertise in local newspaper'.
- Respondents to the 2014 survey listed the same methods, in the same order, as being their preferred methods of recruitment.

11.2 Staff Recruitment by Area

Question: How do you normally recruit staff?

Graph 11.2.1 Staff Recruitment by area



Note: Total will not add up to 100% as some respondents have selected more than one answer

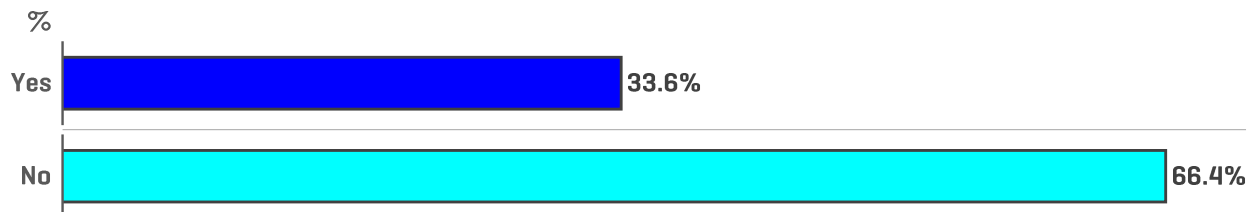
Key Results:

- Results show that businesses in the Wollondilly LGA were least likely to advertise online or to use recruitment agencies but more likely to do so by 'word of mouth'.
- The Campbelltown LGA had the most businesses using 'advertise online' and using an 'employment agency'.
-

11.3 Staff Recruitment

Question: Are there any occupational skills you find difficult to source from the local area?

Graph 11.3.1: Difficulty sourcing occupational skills



Graph 11.3.1a: Difficulty sourcing occupational skills - Comparison

Difficulty Sourcing Occupational Skills Locally	Overall %
2014	30
2017	34

Legend:

	2017 Statistically higher than 2014
	2017 Statistically lower than 2014
	No Statistical difference

Note: The index is the percentage of businesses that reported that there are difficult to source occupational skills in their local area.

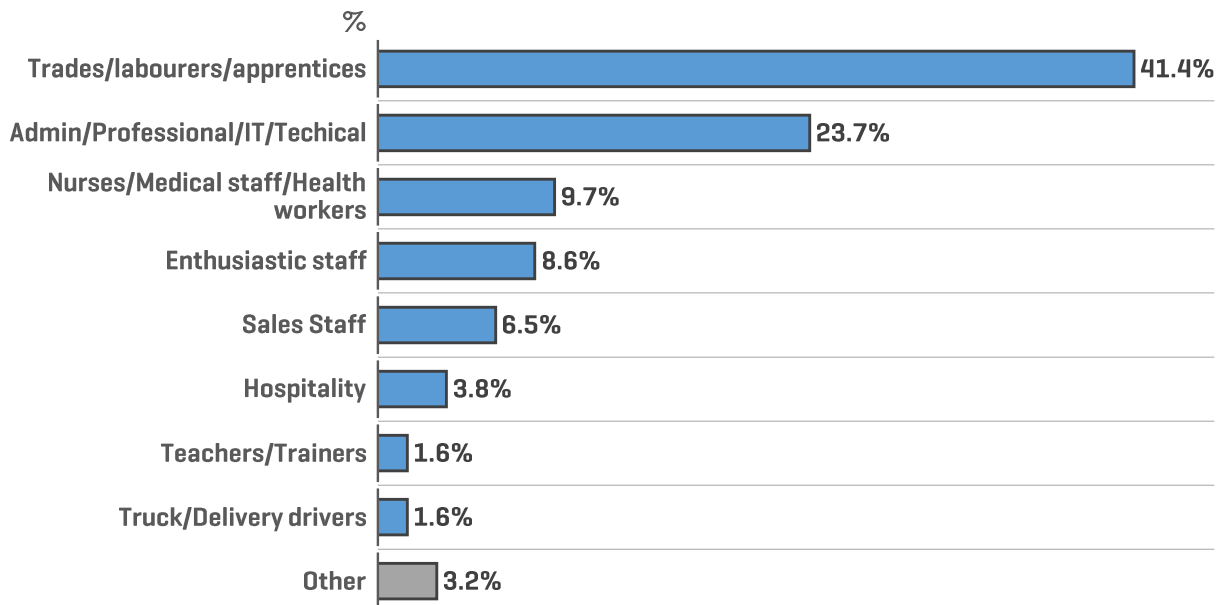
Key Results:

- When businesses were asked if there are any occupational skills which they find difficult to source from the local area, two thirds of businesses (66.4%) responded 'No', while 33.6% of businesses replied 'Yes'.
- Businesses across the area reported no change in difficulty sourcing occupational skills when compared to 2014.

11.4 Staff Recruitment – Difficult to Recruit Occupations

Question: What occupational areas do you have difficulty in recruiting?

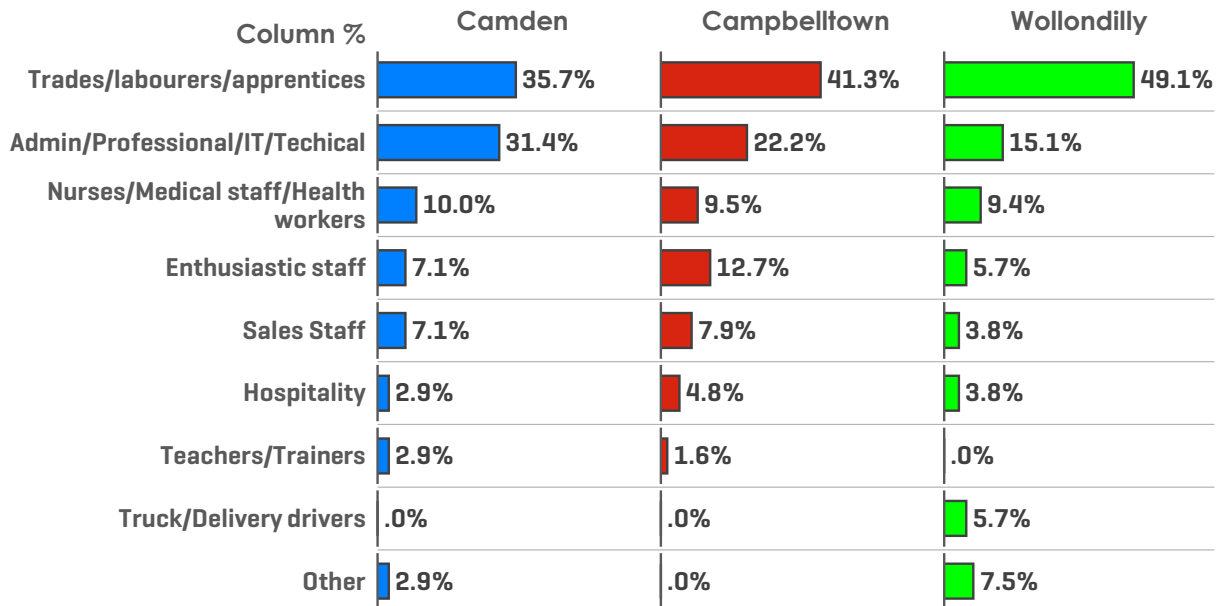
Graph 11.4.1: Occupational areas difficult to recruit (n=186)



Key Results:

- Of the businesses that reported having difficulty recruiting in certain occupational areas, over half (41.4% - down from 47.5% in 2014) identified 'trades people / labourers / apprentices'.
- The second most difficult occupational area for businesses to recruit was 'Admin / professional / IT / technical' (23.7% - on par with the 2014 result of 19.4%). This was followed by and 'nurses / medical staff / health workers' (9.7%) and 'enthusiastic staff' (8.6%).
- The same occupational areas were identified in the 2014 survey.

Graph 11.4.2: Occupational areas difficult to recruit by Area



Note: Total will not add up to 100% as some respondents have selected more than one answer

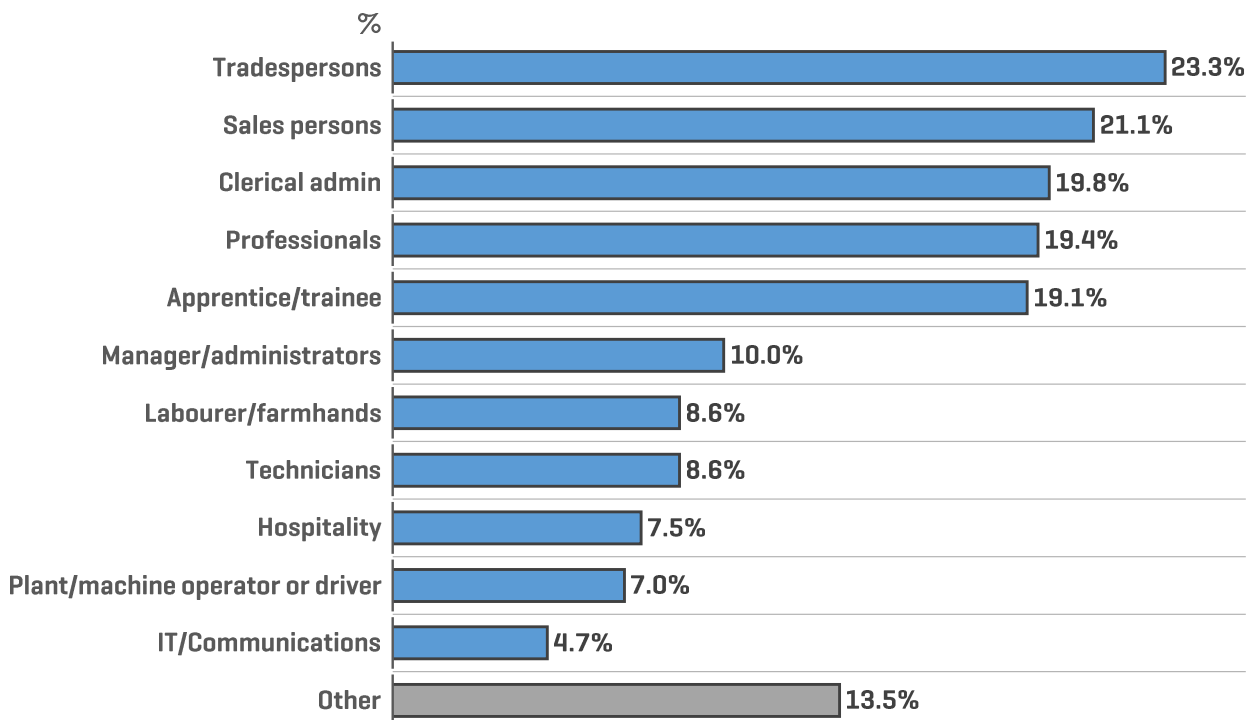
Key Results:

- Wollondilly businesses reported the most difficulty recruiting 'Trades people / labourers / apprentices' (49.1%) of the three LGAs, and the least difficulty recruiting 'Admin professional / IT / technical' staff (15.1%).

12.1 Sought After Occupations

Question: *If you were looking to employ new staff in the future, what occupations are you looking for?*

Graph 12.1.1: Sought After Occupations (n=602)

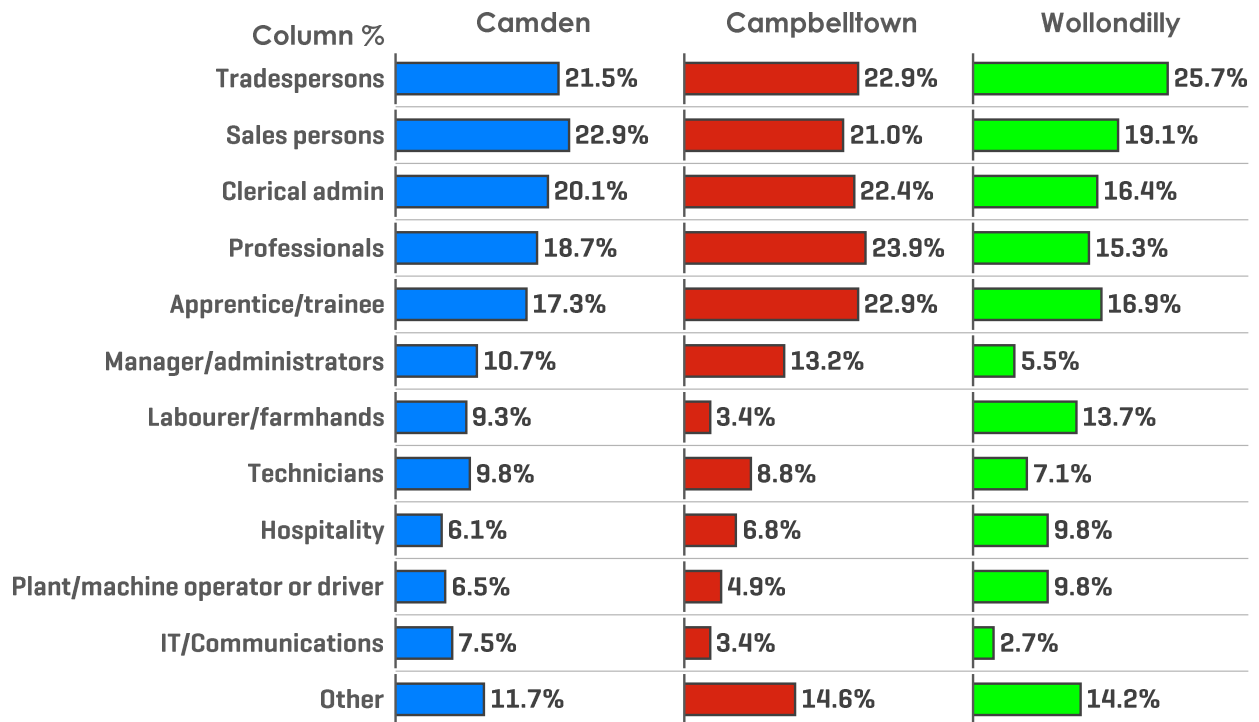


Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- Businesses were asked what occupations they are looking for if they were to employ new staff in the future. One in four businesses (23.3%) selected 'Tradespersons' while 21.1% selected 'Sales persons'.
- 'Clerical admin' staff were the third most popular at 19.8% followed by 'Professionals' (19.4%) and 'Apprentice / Trainee' (19.1%).
- The same top five most sought after occupations were identified in the 2014 survey. There is no statistically significant difference for any of the occupations between the 2014 and 2017 surveys.

Graph 12.1.2: Sought After Occupations by Area (n=602)



Note: Total will not add up to 100% as some respondents have selected more than one answer

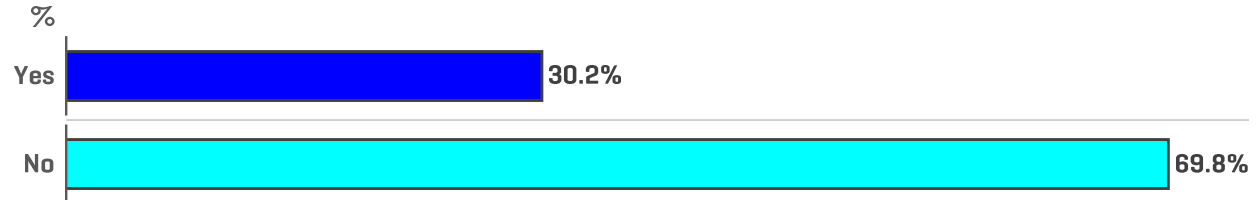
Key Results:

- Wollondilly businesses identified a lesser need for 'manager/administrators' and a greater need for 'labourer/farmhands' than Camden or Campbelltown.
- Campbelltown identified a lesser need for 'labourer/farmhands' than the other LGAs.

13.1 Industry Support Groups

Question: Do you belong to any industry support group such as a local chamber of commerce etc.?

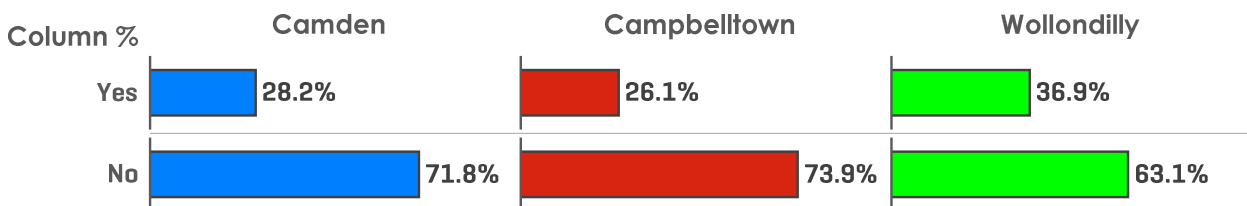
Graph 13.1.1: Industry Support Group (n=587)



Key Results:

- When businesses were asked if they belong to any industry support group such as a local Chamber of Commerce, seven in ten businesses (69.8%) responded 'No'.
- On the other hand, three in ten businesses (30.2% up from 22.3% in 2014) said they do belong to an industry support group such as a Chamber of Commerce.

Graph 13.1.2: Industry Support Group by Area (n=602)



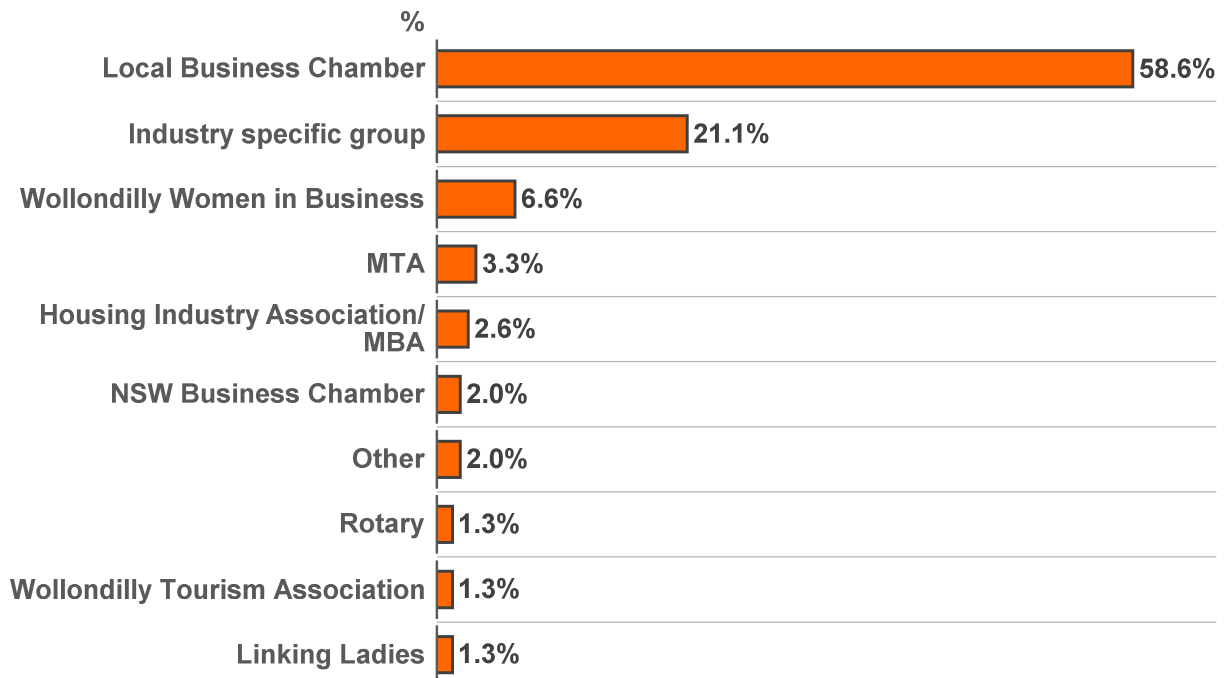
Key Results:

- Businesses in the Wollondilly LGA reported the highest industry support group membership (36.9%) of any of the LGAs.

13.2 Industry Support Group

Question: Which local industry support group do you belong to?

Graph 14.1: Industry Support Group (n=152)



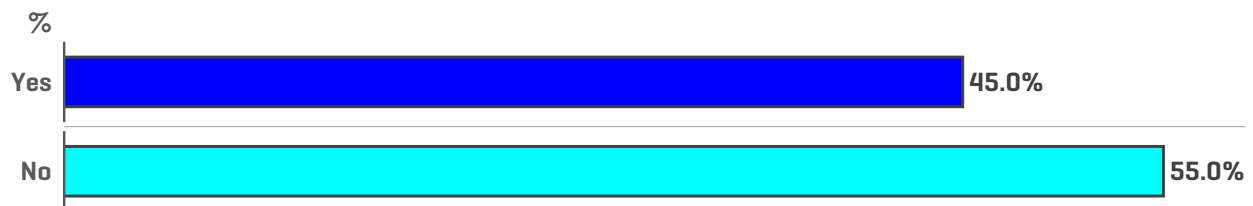
Key Results:

- Of the businesses that reported belonging to an industry support group, three in five (58.6%) reported belonging to a local business chamber. A further one in five (21.1%) indicated that they belonged to an industry specific group.

14.1 Interest in Meeting with Local Business Support Groups

Question: Are you interested in meeting with local business support networking groups such as Chamber of Commerce?

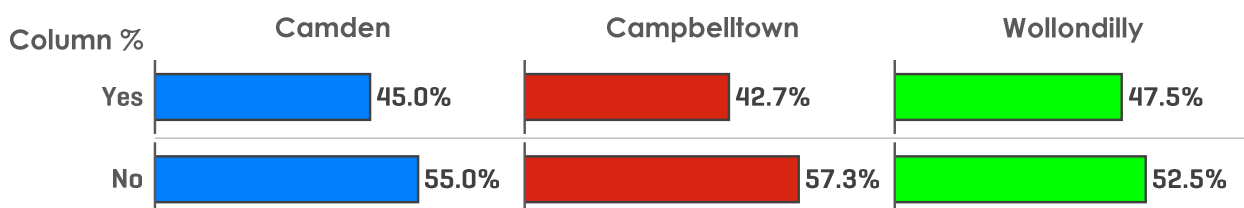
Graph 14.1.1: Meeting with Local Business Support Groups (n=602)



Key Results:

- When asked if they were interested in meeting with local business support networking groups such as a Chamber of Commerce, slightly less than half (45.0%) said that they were interested. This is a significant increase on the 31.2% that indicated an interest in 2014.

Graph 14.2: Meeting with Local Business Support Groups by Area



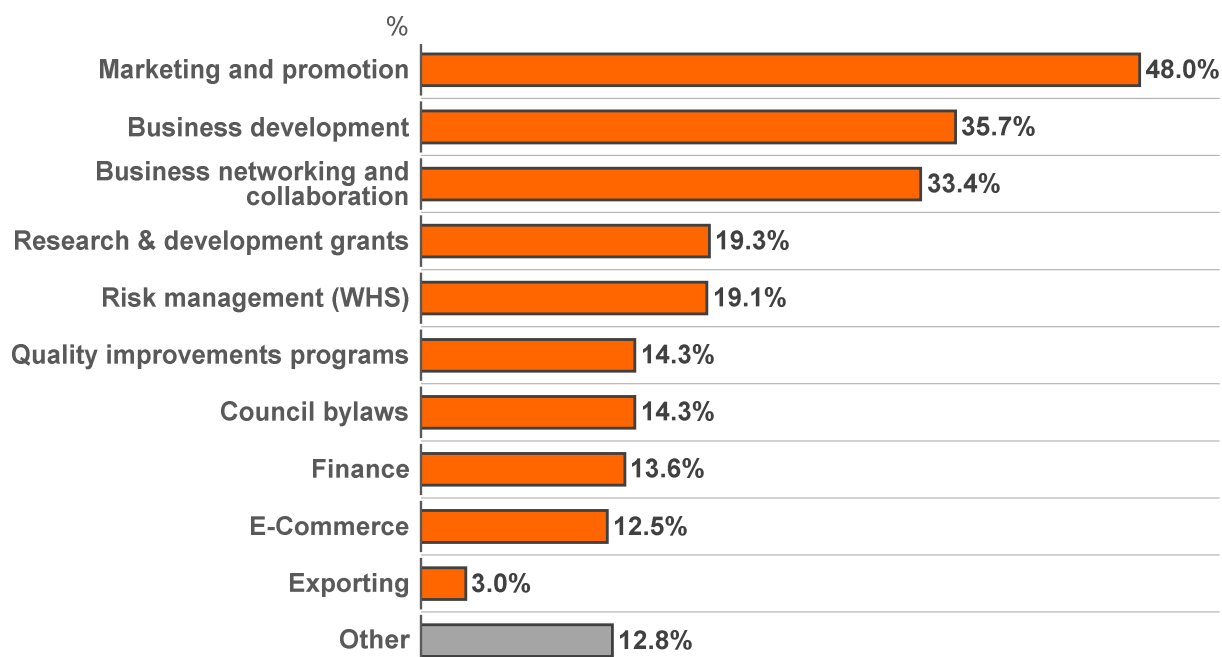
Key Results:

- There is no significant difference in businesses interested in meeting with local business support networking groups across the three LGAs.
- This is a comparable result to 2014.

15.1 Information to Improve the Performance of Your Business

Question: In which of the following areas would you like more information to improve the performance of your business?

Graph 15.1.1: Information to improve the performance of Your Business (n=384)

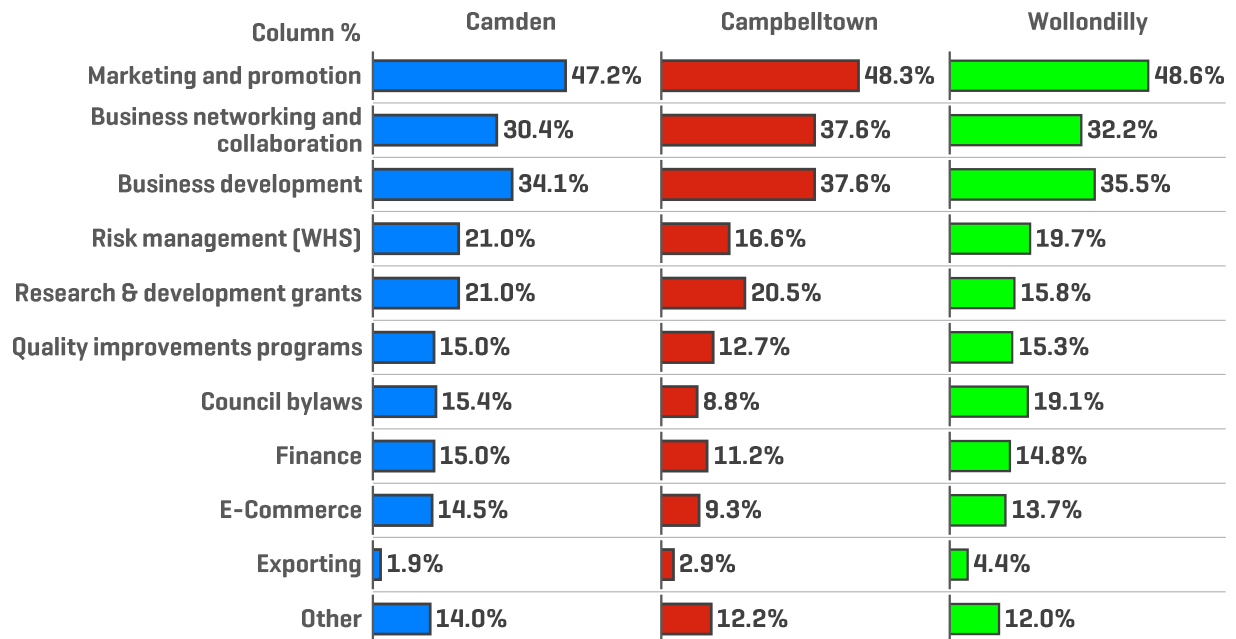


Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- When businesses were asked to choose from a number of areas in which they would like more information to improve the performance of their business three in four (48.0%) selected 'Marketing and promotion'. This also rated top in 2014.
- The proportion of businesses who selected 'Business development' and 'Business networking and collaboration' returned similar results at 35.7% and 33.4% respectively.
- One in five businesses (19.3%) selected 'Research and development grants' while 19.1% of business selected 'Risk management (WHS)'.
- The same key areas were identified in the 2014 survey.

Graph 15.1.2: Information to improve the performance of Your Business by Area (n=602)



Note: Total will not add up to 100% as some respondents have selected more than one answer

Key Results:

- Businesses in Campbelltown identified 'business networking and collaboration' as more important than Camden and Wollondilly and information on 'council bylaws' as being of lesser interest.
- Camden businesses have identified information on 'E-Commerce' as being of high interest.
- Wollondilly businesses have less interest in 'research & development grants'.