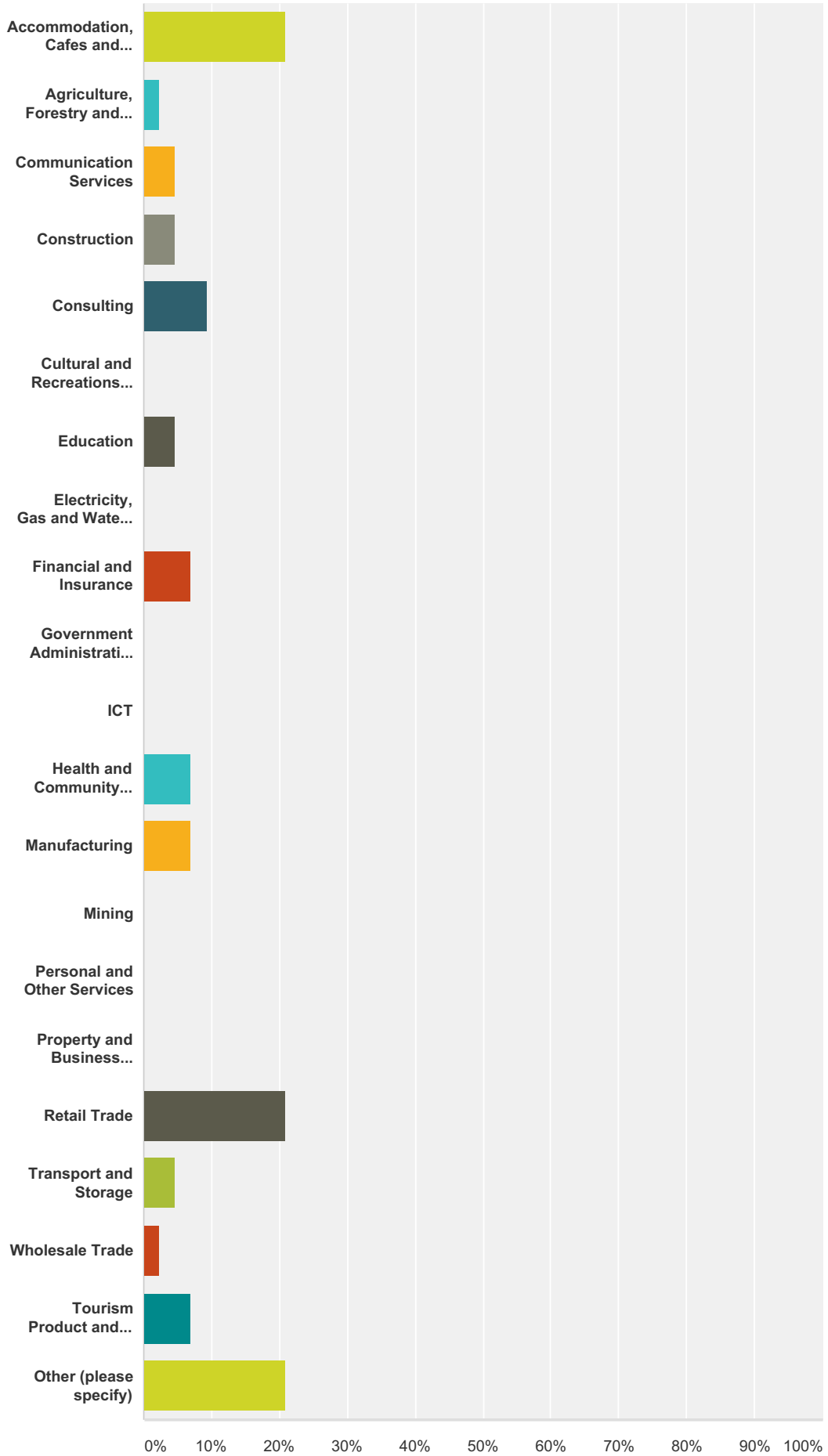


Q1 Which industry do you belong to?

Answered: 43 Skipped: 0

Business Confidence Survey December 2014



Answer Choices

Responses

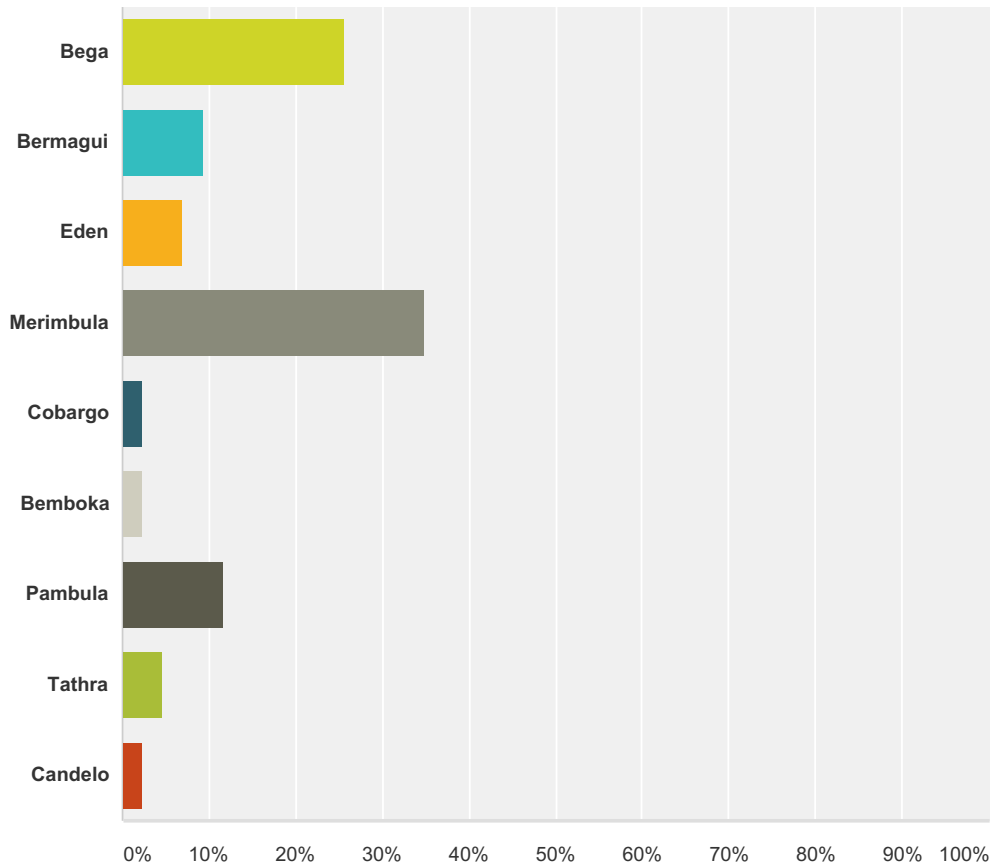
Business Confidence Survey December 2014

Accommodation, Cafes and Restaurants	20.93%	9
Agriculture, Forestry and Fishing	2.33%	1
Communication Services	4.65%	2
Construction	4.65%	2
Consulting	9.30%	4
Cultural and Recreations Services	0.00%	0
Education	4.65%	2
Electricity, Gas and Water Supply	0.00%	0
Financial and Insurance	6.98%	3
Government Administration and Defence	0.00%	0
ICT	0.00%	0
Health and Community Services	6.98%	3
Manufacturing	6.98%	3
Mining	0.00%	0
Personal and Other Services	0.00%	0
Property and Business Services	0.00%	0
Retail Trade	20.93%	9
Transport and Storage	4.65%	2
Wholesale Trade	2.33%	1
Tourism Product and Services	6.98%	3
Other (please specify)	20.93%	9
Total Respondents: 43		

#	Other (please specify)	Date
1	Community Transport Service	1/5/2015 12:25 PM
2	Amenity Tree Services, Flora/Fauna Surveys	12/20/2014 6:28 PM
3	Cafe/Bookshop	12/18/2014 6:23 AM
4	Domestic resource reuse consulting	12/17/2014 4:06 PM
5	art	12/17/2014 6:27 AM
6	Wellness Centre	12/16/2014 5:13 PM
7	Marketing and coaching	12/16/2014 6:40 AM
8	Graphic Design	12/15/2014 4:05 PM
9	Our business is in Brogo - not represented below!! Not good Bega Valley Council	12/15/2014 2:15 PM

Q2 In which region do you primarily operate your business from? Please nominate the closest centre.

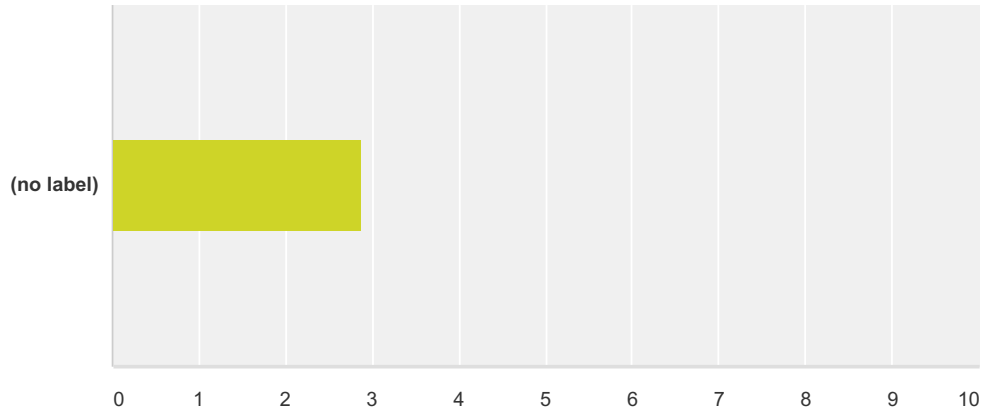
Answered: 43 Skipped: 0



Answer Choices	Responses
Bega	25.58% 11
Bermagui	9.30% 4
Eden	6.98% 3
Merimbula	34.88% 15
Cobargo	2.33% 1
Bemboka	2.33% 1
Pambula	11.63% 5
Tathra	4.65% 2
Candelo	2.33% 1
Total	43

Q3 How has your business/organisation performed over the LAST 6 months relative to the previous 6 months?

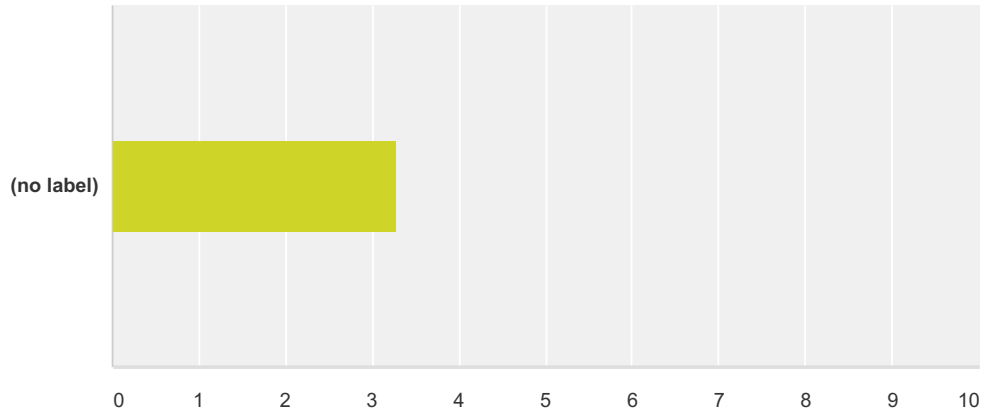
Answered: 43 Skipped: 0



	Much Weaker	Somewhat Weaker	About the Same	Somewhat Stronger	Much Stronger	Total	Weighted Average
(no label)	13.95% 6	20.93% 9	32.56% 14	27.91% 12	4.65% 2	43	2.88

Q4 How do you believe your business/organisation will perform in the NEXT 6 months compared with the last 6 months?

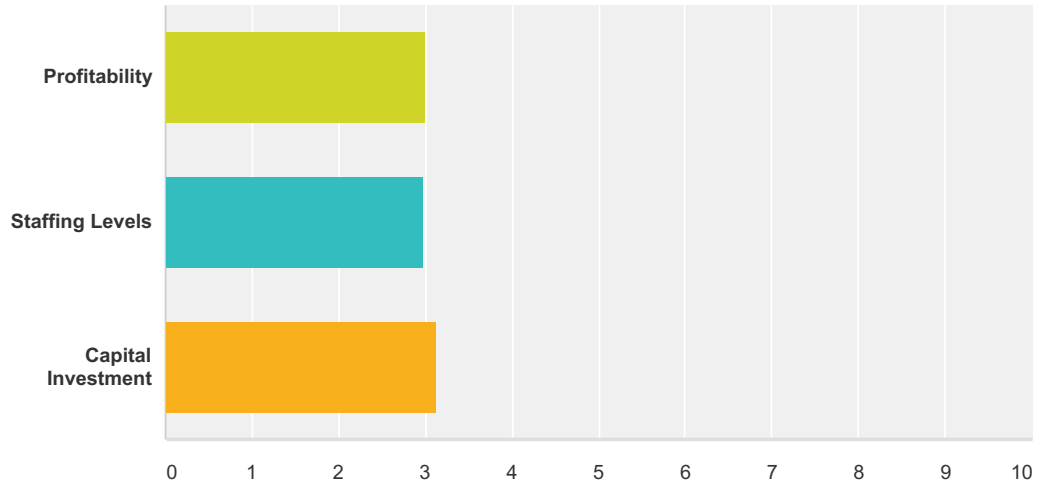
Answered: 43 Skipped: 0



	Much Weaker	Somewhat Weaker	About the Same	Somewhat Stronger	Much Stronger	Total	Weighted Average
(no label)	2.33% 1	11.63% 5	44.19% 19	39.53% 17	2.33% 1	43	3.28

Q5 In your business / organisation do you expect an increase, decrease or no change over the next 6 months in the following areas?

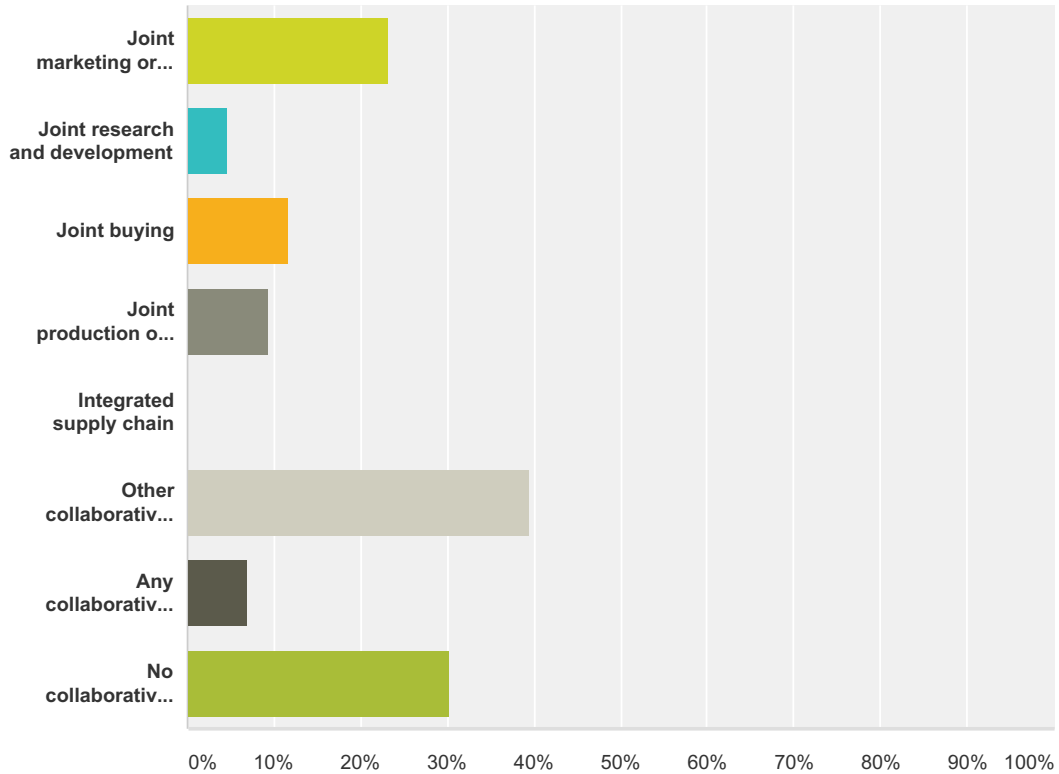
Answered: 43 Skipped: 0



	Significant Decrease	Slight Decrease	No Change	Slight Increase	Significant Increase	Total	Weighted Average
Profitability	9.30% 4	20.93% 9	37.21% 16	25.58% 11	6.98% 3	43	3.00
Staffing Levels	2.33% 1	13.95% 6	69.77% 30	11.63% 5	2.33% 1	43	2.98
Capital Investment	6.98% 3	9.30% 4	55.81% 24	18.60% 8	9.30% 4	43	3.14

Q6 What actions have you taken (or plan to take) to partner or collaborate with other businesses or suppliers to increase trade or exposure for your business?

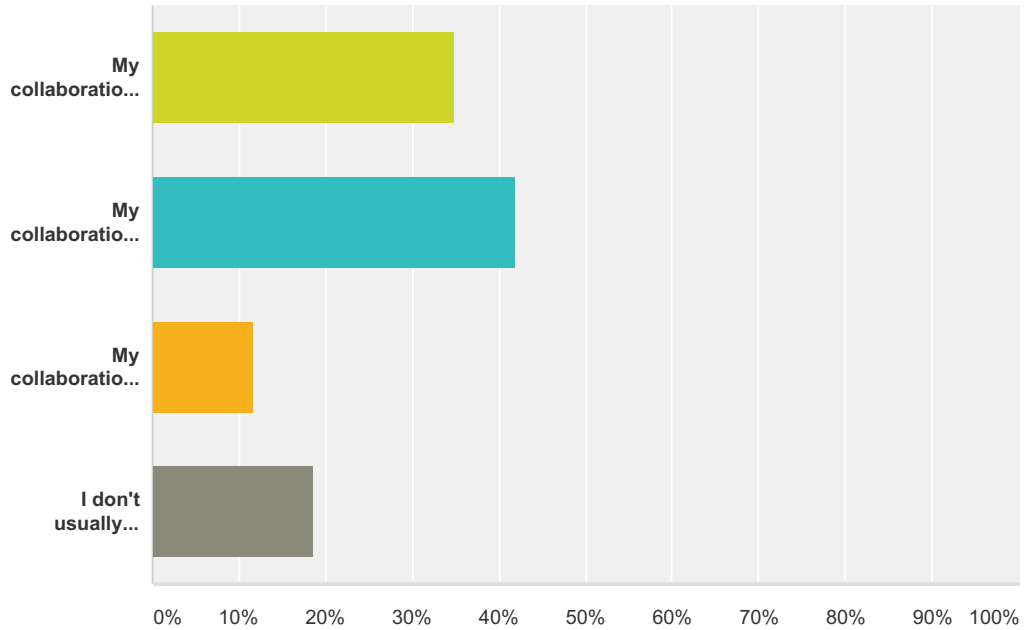
Answered: 43 Skipped: 0



Answer Choices	Responses
Joint marketing or distribution	23.26% 10
Joint research and development	4.65% 2
Joint buying	11.63% 5
Joint production of goods and services	9.30% 4
Integrated supply chain	0.00% 0
Other collaborative arrangements	39.53% 17
Any collaborative arrangements	6.98% 3
No collaborative arrangements	30.23% 13
Total Respondents: 43	

Q7 We would like to understand the type of collaborations by GEOGRAPHICAL LOCATION, and would appreciate you choosing the statement that best suits you.

Answered: 43 Skipped: 0

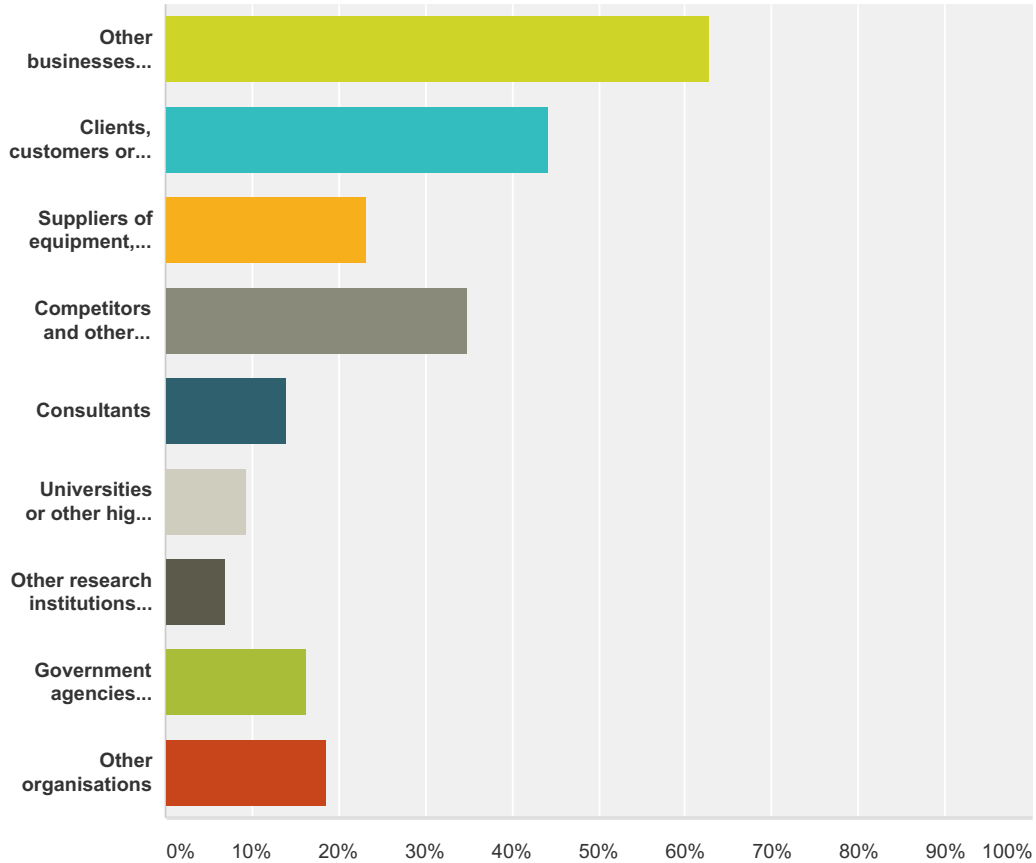


Answer Choices	Responses
My collaborations are mostly with local businesses (e.g. Bega)	34.88% 15
My collaborations are mostly with Australian businesses - including regions outside Bega.	41.86% 18
My collaborations are varied and include international businesses.	11.63% 5
I don't usually collaborate.	18.60% 8
Total Respondents: 43	

#	Other (please specify)	Date
1	We will be looking at opportunities with other like services	1/5/2015 12:25 PM
2	Just starting to do this. Joint Ventures.	12/16/2014 5:13 PM
3	our location is in BROGO	12/15/2014 2:15 PM

Q8 We also wish to understand the type of collaborations by BUSINESS TYPE, therefore please indicate from the list below the types of businesses you are collaborating with or considering collaborating with.

Answered: 43 Skipped: 0



Answer Choices	Responses
Other businesses related to my business	62.79% 27
Clients, customers or buyers	44.19% 19
Suppliers of equipment, materials, components or software	23.26% 10
Competitors and other businesses from the same industry	34.88% 15
Consultants	13.95% 6
Universities or other higher education institutions	9.30% 4
Other research institutions (including private, not for profit, government and commercial)	6.98% 3
Government agencies (excluding government research institutions)	16.28% 7
Other organisations	18.60% 8
Total Respondents: 43	

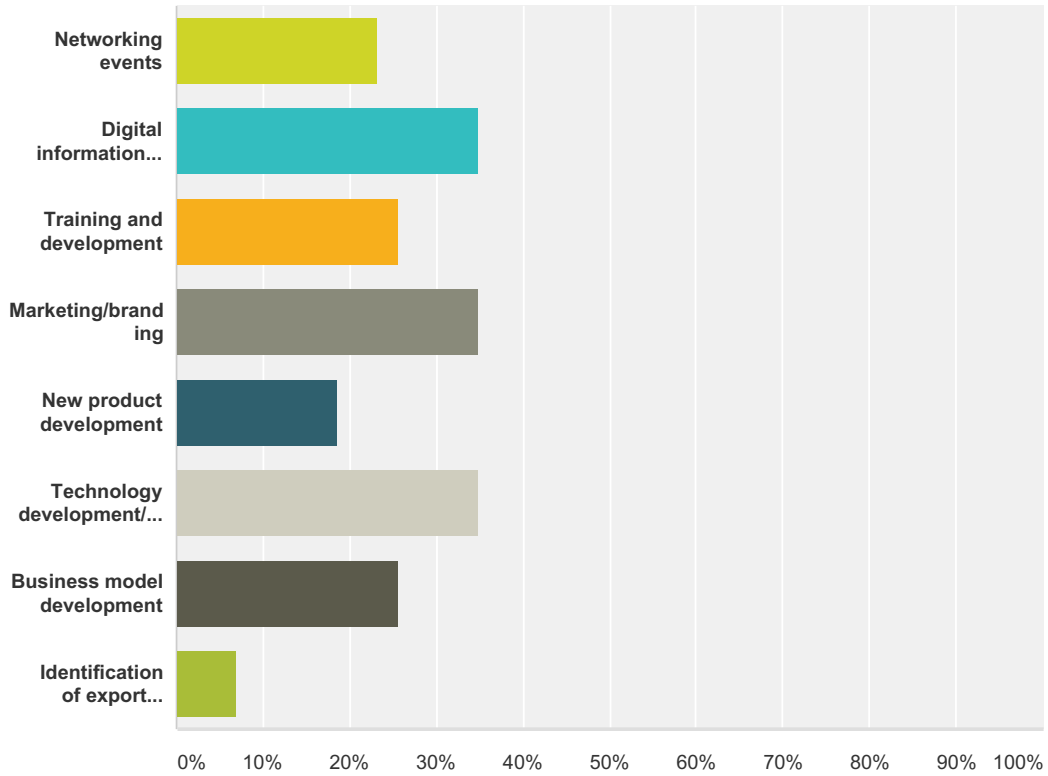
#	Other (please specify)	Date
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1	N/A	12/19/2014 7:34 AM
2	Grant organisations	12/19/2014 6:33 AM
3	Buying groups	12/18/2014 6:23 AM
4	No collaboration	12/17/2014 1:16 PM
5	None	12/16/2014 6:10 PM
6	complementary businesses	12/16/2014 6:40 AM
7	World Trade Organisation	12/15/2014 4:59 PM
8	None	12/15/2014 1:48 PM
9	NA	12/15/2014 1:19 PM

Q9 What would assist your business to develop partnerships or collaborative agreements in order to expand business operations into new markets - including local, national and international markets?

Answered: 43 Skipped: 0



Answer Choices	Responses
Networking events	23.26% 10
Digital information portals and/or e-newsletters	34.88% 15
Training and development	25.58% 11
Marketing/branding	34.88% 15
New product development	18.60% 8
Technology development/improvements	34.88% 15
Business model development	25.58% 11
Identification of export opportunities	6.98% 3
Total Respondents: 43	

#	Other (please specify)	Date
1	Growth in the Region itself. But none of the above	1/7/2015 1:57 PM
2	No collaboration	12/17/2014 1:16 PM
3	None	12/16/2014 6:10 PM

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4	Objectives and subject types used by industry and business	12/15/2014 4:59 PM
5	Better interaction with Council!!	12/15/2014 2:30 PM
6	Much stronger confidence in the building/construction market	12/15/2014 2:18 PM
7	Local vision	12/15/2014 1:50 PM
8	Bega projects going to locals	12/15/2014 1:48 PM
9	NA	12/15/2014 1:19 PM

Q10 What barriers or major difficulties (if any) have you encountered in developing collaborations or partnerships?

Answered: 43 Skipped: 0

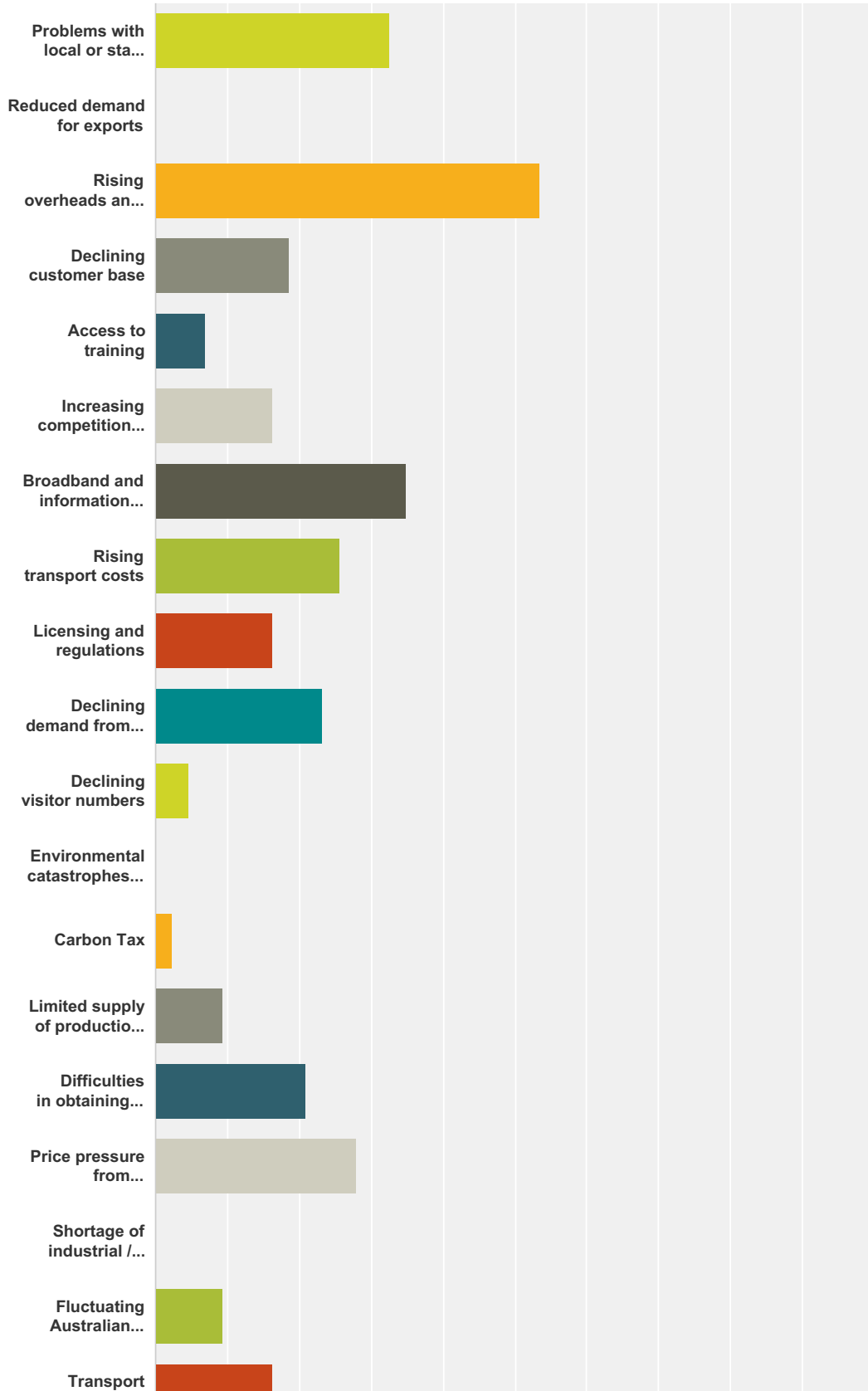
#	Responses	Date
1	IT Cohesion, under standing market place, not interested and general apathay.	1/17/2015 1:51 PM
2	No assistance from Government at any level in assisting business growth or reducing red tape. To much regulation with all levels of government	1/7/2015 1:57 PM
3	Because of all the changes coming in our industry over the next three years, getting accurate information about what directions we should investigate, a higher degree of competitiveness making information sharing more unlikely, shifting Government policy and attitude.	1/5/2015 12:25 PM
4	None noted	12/28/2014 1:55 PM
5	Ongoing staff changes with partners (NPWS, BVSC, LHPA) means benefits of previous networking are lost.	12/20/2014 6:28 PM
6	Other business owners not interested, or don't have the time.	12/19/2014 7:34 AM
7	Lack of awareness	12/19/2014 6:33 AM
8	Lack of interest in others.	12/18/2014 11:05 AM
9	None. Business has joined a major buying group and also there have been at least two collaborations in terms of trying to increase local shopping - Chamber of Commerce and local retailers group.	12/18/2014 6:23 AM
10	reliable internet service	12/17/2014 4:06 PM
11	Little or no interest from similar businesses	12/17/2014 1:48 PM
12	Unique service provider - no parallels available	12/17/2014 1:16 PM
13	n/a	12/17/2014 6:27 AM
14	none	12/17/2014 6:04 AM
15	Bega is a very tight knit community. Whilst this can be a good trait it can also be detrimental to new businesses as the vast majority will continue to utilise the existing services/suppliers rather than compare the new competition - regardless of price and/or quality/service.	12/16/2014 8:57 PM
16	None	12/16/2014 6:34 PM
17	government red tape and legislation covering employment and subcontracting	12/16/2014 6:14 PM
18	No relationship to my business	12/16/2014 6:10 PM
19	The fear of me 'stealing' their clients - lack of understanding how Joint Ventures work and benefit.	12/16/2014 5:13 PM
20	Too much adhoc regulations by local council that doesn't help or encourage additional business activities.	12/16/2014 4:10 PM
21	It is always difficult getting everyone to work for the common good of a group	12/16/2014 3:24 PM
22	None	12/16/2014 11:05 AM
23	None	12/16/2014 8:41 AM
24	I FIND IT HARD TO FIND INTEREST FROM OTHER LOCAL BUSINESSES	12/16/2014 8:37 AM
25	Price competitiveness compared with integrated service businesses.	12/16/2014 8:35 AM
26	Parochial mindset compromises effective marketing of the region.	12/16/2014 8:34 AM
27	Actually finding other businesses who may be interested in collaborating.	12/16/2014 6:40 AM
28	none	12/16/2014 5:55 AM
29	having time to do it.	12/15/2014 10:27 PM
30	There is a varied response to correspondence .	12/15/2014 4:59 PM
31	n/a	12/15/2014 4:16 PM

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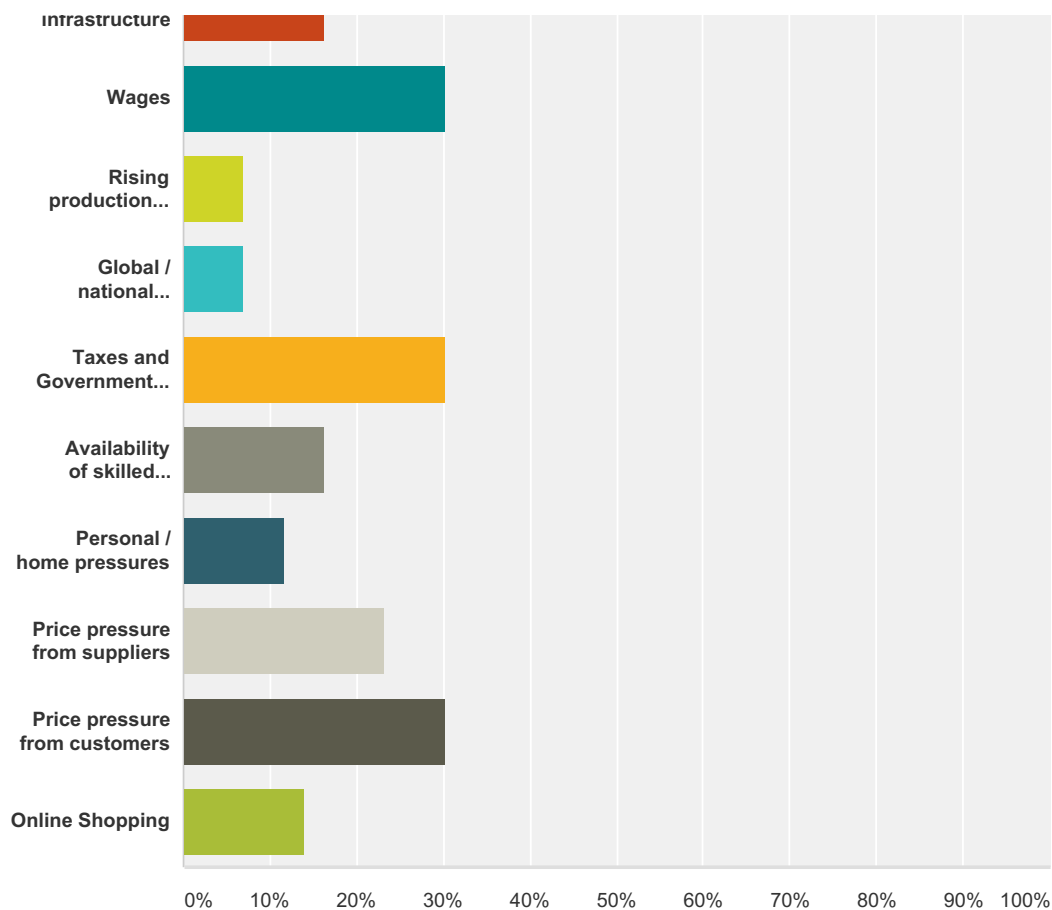
32	Finding the best avenues to meeting the right people	12/15/2014 4:05 PM
33	most clothing is imported and it is hard to find Australian companies to buy fabric from or Australian companies to make clothing for us that is affordable	12/15/2014 3:11 PM
34	Lack of motivation.	12/15/2014 2:30 PM
35	No strong confidence in the building/construction markets	12/15/2014 2:18 PM
36	wE COLLABORATE WITH OTHER LOCAL b&b'S. mERIMBULA MARKETS SEPARATELY AND DOESN'T WANT TO HAVE OTHERS INVOLVED FROM OTHER AREAS.	12/15/2014 2:15 PM
37	Awareness, education and information about my business which introduces angel investors to businesses seeking funding, mentoring and other business guidance. see businessangels.com.au	12/15/2014 2:13 PM
38	No difficulties	12/15/2014 2:10 PM
39	none	12/15/2014 2:06 PM
40	Governments change of heart on clean energy projects.	12/15/2014 1:55 PM
41	Nil	12/15/2014 1:50 PM
42	Projects going to builders outside the Bega Valley.	12/15/2014 1:48 PM
43	NA	12/15/2014 1:19 PM

Q11 In your opinion, what are the major constraints on the growth of your own business? Your answers to this question contribute to an ongoing look at major business constraints over time.

Answered: 43 Skipped: 0



Business Confidence Survey December 2014



Answer Choices	Responses	Count
Problems with local or state Government planning regulations	32.56%	14
Reduced demand for exports	0.00%	0
Rising overheads and utility costs	53.49%	23
Declining customer base	18.60%	8
Access to training	6.98%	3
Increasing competition from low-cost imports	16.28%	7
Broadband and information technology access (e.g. Black Spot)	34.88%	15
Rising transport costs	25.58%	11
Licensing and regulations	16.28%	7
Declining demand from customers	23.26%	10
Declining visitor numbers	4.65%	2
Environmental catastrophes (oil slicks, hurricanes, flooding etc)	0.00%	0
Carbon Tax	2.33%	1
Limited supply of production materials / product	9.30%	4
Difficulties in obtaining finance / extending credit facilities	20.93%	9
Price pressure from competitors	27.91%	12
Shortage of industrial / commercial land	0.00%	0

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Fluctuating Australian Dollar	9.30%	4
Transport infrastructure	16.28%	7
Wages	30.23%	13
Rising production costs	6.98%	3
Global / national economic performance	6.98%	3
Taxes and Government charges	30.23%	13
Availability of skilled workers	16.28%	7
Personal / home pressures	11.63%	5
Price pressure from suppliers	23.26%	10
Price pressure from customers	30.23%	13
Online Shopping	13.95%	6
Total Respondents: 43		

#	Other (please specify)	Date
1	Payroll Tax is no incentive to expand as well as Workers Compensation Costs	1/7/2015 1:57 PM
2	skilled local people loosing jobs through government decisions	12/16/2014 6:14 PM
3	Air BNB and other guest houses opening in the area has caused quite a significant decline in our business	12/15/2014 2:15 PM
4	Awareness	12/15/2014 2:13 PM

Q12 What would make a difference to the profitability or viability of your business?

Answered: 43 Skipped: 0

#	Responses	Date
1	broader market appeal and marketing. sentiment change.	1/17/2015 1:51 PM
2	Reduced Insurance and tax levels	1/7/2015 1:57 PM
3	Presently we are unable to enforce a contribution from clients for the service they receive ie not allowed to refuse transport based on inability to pay, so a large number of clients make use of the loophole. If all clients were required to make reasonable contributions we would be much better off. Lower fuel prices would also help. Replacement of vehicles is also a huge expense for us.	1/5/2015 12:25 PM
4	Increased business investment in BVSC region	12/28/2014 1:55 PM
5	Getting more work	12/20/2014 6:28 PM
6	Having more time and money to invest in the business. Having more affordable commercial rentals in the area.	12/19/2014 7:34 AM
7	Ndis	12/19/2014 6:33 AM
8	A government that wants to stimulate demand to help its tax income rather than a government that is looking to cut spending and stifle demand.	12/18/2014 11:05 AM
9	Reduced costs, increased visitation (particularly during winter),	12/18/2014 6:23 AM
10	More flexible council regulations	12/17/2014 4:06 PM
11	Lower Council Rates and more local/state/federal funding for South Coast Tourism	12/17/2014 1:48 PM
12	More demand from overseas clients	12/17/2014 1:16 PM
13	larger customer base	12/17/2014 6:27 AM
14	n/a	12/17/2014 6:04 AM
15	Increased Residential development in the Bega Valley would definitely need to improve in order to increase. Hopefully with the recent works ie Bega Shopping complex, bypass and Hospital this will stimulate developer interest.	12/16/2014 8:57 PM
16	- Signage in and around Bega. - "Welcome to Bega" signs at all entries into the town - Access to appropriate council staff - Reduction in council rates	12/16/2014 6:34 PM
17	stop the closure of businesses and industry in the bega valley , there have been sustainable businesses close in the bega valley simply because the government changed its criterias etc.. to suit big business and businesses in areas with large populations ! which we obviously dont have here....	12/16/2014 6:14 PM
18	Wages and utility costs	12/16/2014 6:10 PM
19	Learning to take calculated risks, try something different, step up and out there, be different, take action, be proactive	12/16/2014 5:13 PM
20	Less local and/or State Government planning regulation pressures that doesn't always apply evenly to all. Legal requirements are too ambiguous, overlapping & confusing.	12/16/2014 4:10 PM
21	Better access to finance and/or skilled bankers Better access to staff training facilities More reliable supply of quality raw product Acknowledgement from BVSC that this company donates an enormous amount to the local community so when it comes time for council to take on projects locally they show a little loyalty and buy locally	12/16/2014 3:24 PM
22	Consumer confidence and a new Federal government	12/16/2014 11:05 AM
23	Simpler DA processes	12/16/2014 8:41 AM
24	MORE FUNDING FOR NOT FOR PROFITS	12/16/2014 8:37 AM
25	More consistent standards and adherence to these standards from government agencies	12/16/2014 8:35 AM
26	Information about the region	12/16/2014 8:34 AM

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27	More ways of getting the word out to others very cheaply	12/16/2014 6:40 AM
28	recycling program for our paper, plastic and greenwaste through our local tip - they are not open enough hours.	12/16/2014 5:55 AM
29	no more cutting on PBS system and give an the industry more stability	12/15/2014 10:27 PM
30	Global integration and acquiescence by UN andWorld Bank to the needs of the global population and the peoples of the united nations to education , sanitation , health , work , wealth and gain .	12/15/2014 4:59 PM
31	n/a	12/15/2014 4:16 PM
32	Building a larger client base	12/15/2014 4:05 PM
33	government grants to small businesses to help them establish themselves again cheap imports and cheap labour which is driven from overseas	12/15/2014 3:11 PM
34	An intelligent and unbiased Council signage policy.	12/15/2014 2:30 PM
35	Answered in questions 9 & 10	12/15/2014 2:18 PM
36	Council doing a lot more marketing and spending \$ in on-line and TV advertising. Sapphire coast tourism allowing us to advertise separately on-line. We do not advertise in magazines any longer but have not been allowed to just advertise on the net. The shire putting out some really good info on the area. Victoria has excellent maps etc and drives. The Brogo Dam and canoeing should be on the map.	12/15/2014 2:15 PM
37	Awareness, education and information about my business which introduces angel investors to businesses seeking funding, mentoring and other business guidance.	12/15/2014 2:13 PM
38	NDIS not starting before 2020 Nr. 2 question: we operate in all of these areas and beyond, up to Cooma, Queanbeyan and down to Murrumbidgee	12/15/2014 2:10 PM
39	More holiday makers in off season	12/15/2014 2:06 PM
40	Improved support for Australian Manufacturing and more focus on clean energy	12/15/2014 1:55 PM
41	Local development and planning vision and lot less negativity	12/15/2014 1:50 PM
42	Support from the local area, including council projects	12/15/2014 1:48 PM
43	More residents and businesses within the shire.	12/15/2014 1:19 PM