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# MYOB Australian Small Business Survey

## December 2008

### Small Business Survey Report

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Report prepared for



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## About the study

This report presents the summary findings for key indicators from the MYOB Australian Small Business Survey comprising a national sample of **1,385** small business proprietors and general managers, conducted in **November and December 2008**. The small businesses participating in the online survey are defined as both non-employing and employing businesses with less than 20 employees. Results have been weighted to reflect the small business population distribution according to the Australian Bureau of Statistics (ABS) for company size, length of time operating, region and selected ANZSIC Industry divisions (refer to ABS publications *Characteristics of Small Business, 2004*; 8127.0 and *Counts of Australian Businesses, June 2006*; 8165.0)

The key indicators presented in this report include:

### **Small Business Issues:**

- Perceptions of current business performance
- Confidence in future business prospects
- Expectations for future business performance and factors underpinning the expectation
- Outlook for specific business issues such as sales, cash flow, business costs and other issues
- Outlook for business revenue
- Likelihood to invest in own business within the next 6 months, and the likely amount of any such investment
- Expectation of employing or reducing staff in the next 12 months
- Methods of finding employees
- Composition of small businesses' workforce

### **Government Issues:**

- Perceptions of the State and Federal Governments performance in contributing to small business development in Australia

The findings of the research are reported by industry type:

<b>Industry</b>	<b>Sample</b>
Agriculture	139
Manufacturing	98
Construction	258
Wholesale Trade	64
Retail Trade	182
Accommodation, Café and Restaurants	33
Transport and Storage	79
Communication, Media and Marketing Services	21
Finance and Insurance	28
Property and Business Services	202
Education	26
Health and Community Services	86
Cultural and Recreational Services	44
Personal and Other Services	79
Information & Communications Technology	42
Tourism	4*
<b>Total</b>	<b>1385</b>

**Note:**

\* Tourism is included in the total statistics reported but is not reported at an industry level due to a low sample size.

The findings are also reported by state for some questions:

<b>State</b>	<b>Sample</b>
NSW	393
VIC	334
QLD	303
SA	109
WA	157
TAS	46
NT	14*
ACT	29*
<b>Total</b>	<b>1385</b>

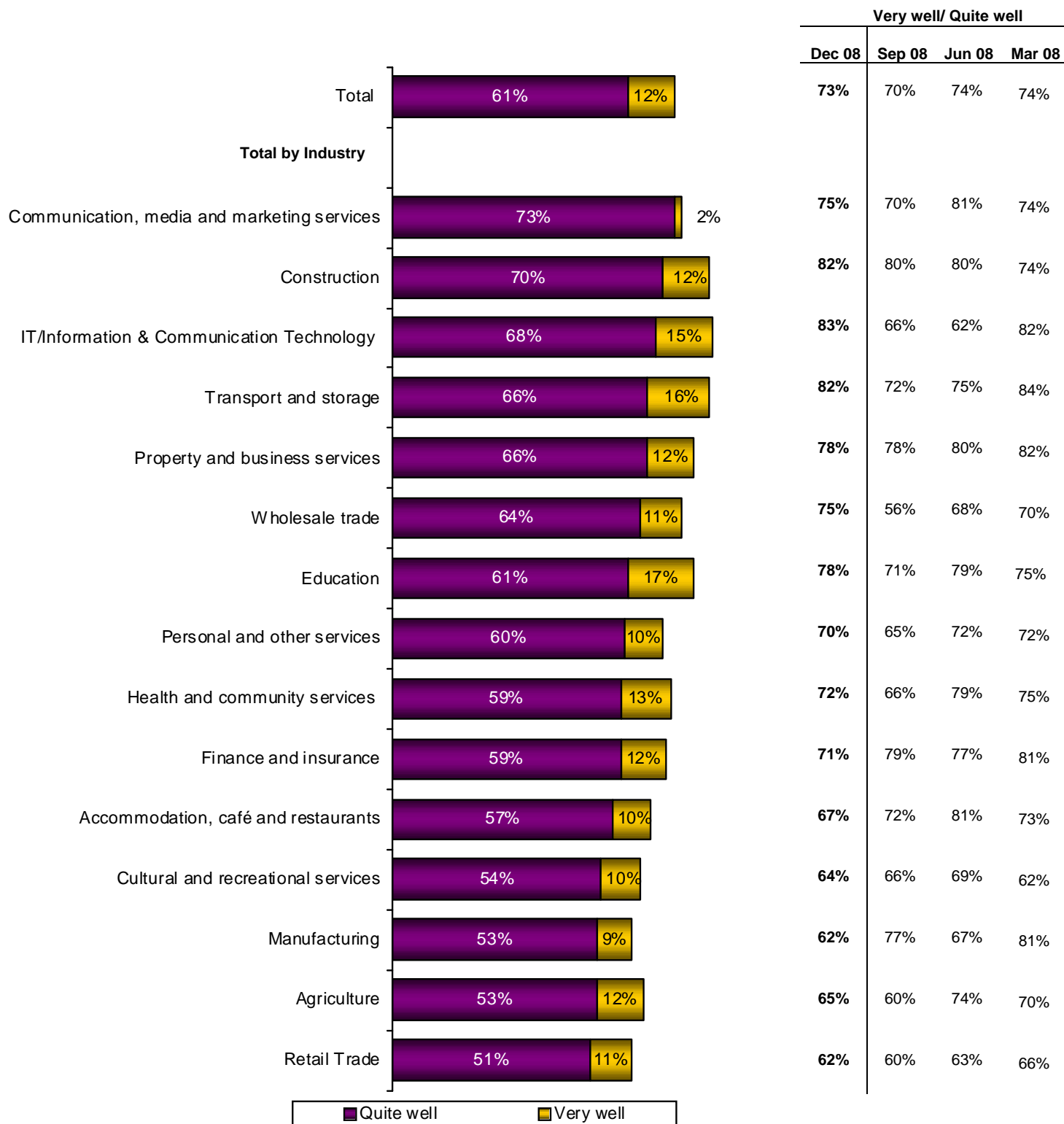
**Note:**

\* Sample sizes for NT and ACT are too small for reliable statistics at a State level, but are included in the total figures.

## Perceptions of own business (current)

### Majority of small business owners surveyed report a positive current business performance

Figure 1: Perceptions of current business performance by industry (%)



**Base:** Small businesses owners (n=1385)

**Q:** Thinking about the current performance of your own business, do you think your business is performing...very well, quite well, not very well, not at all well, don't know?

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AMR Interactive, December 2008

The majority (73%) of small business owners surveyed reported their business as currently performing very or quite well. This is consistent with results from previous quarters.

Small business owners in the IT/Information and Communication Technology sector report the most prosperous performance, with 83% reporting a very or quite well performance. This is a sharp increase from the 66% reported in September 2008 and 62% in June 2008. Following this sector are the Construction and Transport and Storage sectors, both of which have 82% of its small business owners reporting very or quite well for their current business performance.

The largest shift in industry results can be seen in the Wholesale Trade sector where there is an increase of 19% in positive performance from 56% in September 2008 to 75% in December 2008. This is a reversal of the gradual decline in positive results noted in previous quarters for those small businesses in the Wholesale Trade.

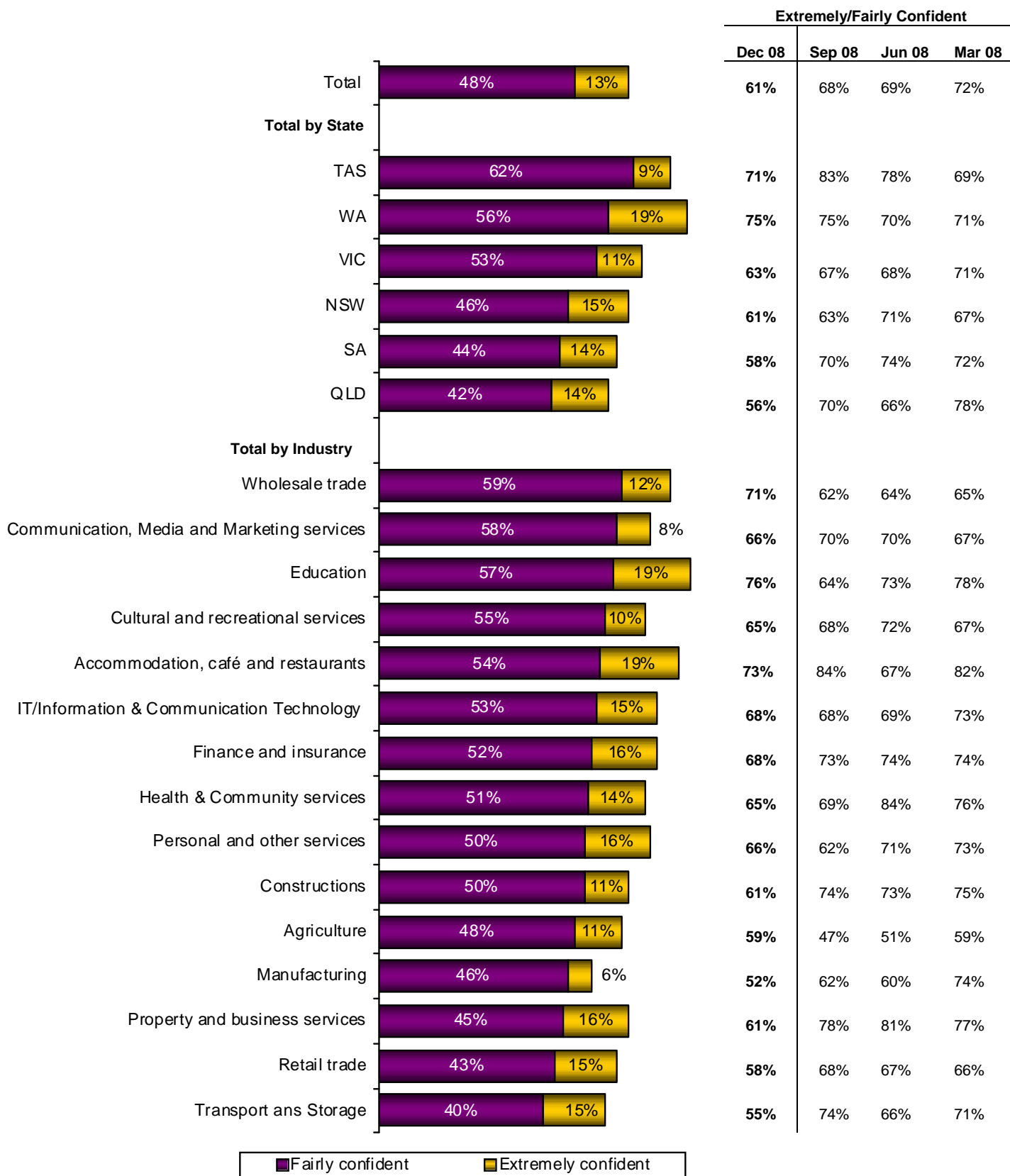
Small business owners in the Retail Trade industry have the lowest reported levels of good current performance, with 62% reporting their business is doing very or quite well.



## Confidence in future business prospects

### 61% of small business owners surveyed are confident in their future business prospects

Figure 2: Confidence in business prospects over the next 12 months by state and industry (%)



**Base:** Small business owners (n=1385)

**Q:** Thinking about the next twelve months, how confident do you feel about the prospects for your own business?

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AMR Interactive, December 2008

The majority (61%) of small business owners surveyed are confident in their future business prospects. There has been consistent declines in confidence over the past 4 quarters ranging from 72% in March 2008, 69% in June 2008 and 68% in September 2008.

Small business owners in Western Australia and Tasmania have above average confidence with 75% and 71% respectively reportedly fairly or extremely confident. For WA, this includes 19% who are extremely confident. South Australia (58%) and Queensland (56%) on the other hand show small business owners with the lowest levels of confidence in future prospects.

In regards to industry, Education and the Accommodation, Café and Restaurant sectors are the most confident with 76% and 73% reporting a confident or extremely confident outlook. The Manufacturing sector is the least confident with only 52% reporting confidence in business prospects. This is followed by Transport and Storage with 55%, showing a 19% decline in confidence since September 2008.

**Perceptions of own business (future)**

**Just under half (46%) of small business owners surveyed report a better than now outlook for their business**

Figure 3: Performance outlook for own business over the next 12 months (%)

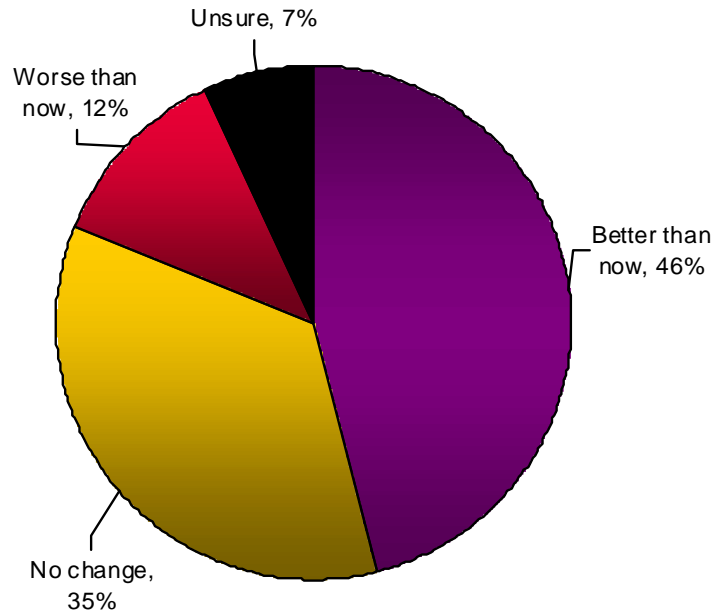


Figure 3.1: Performance outlook (better than now) for own business over the next 12 months by state (%)

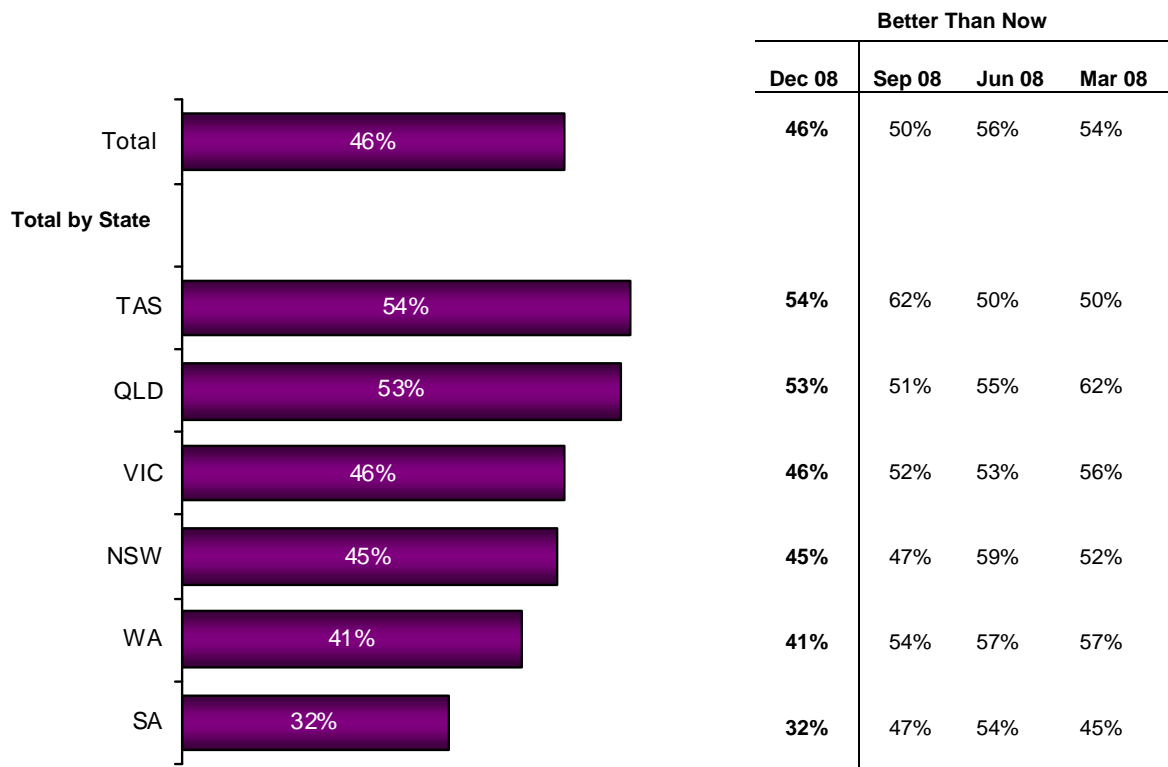
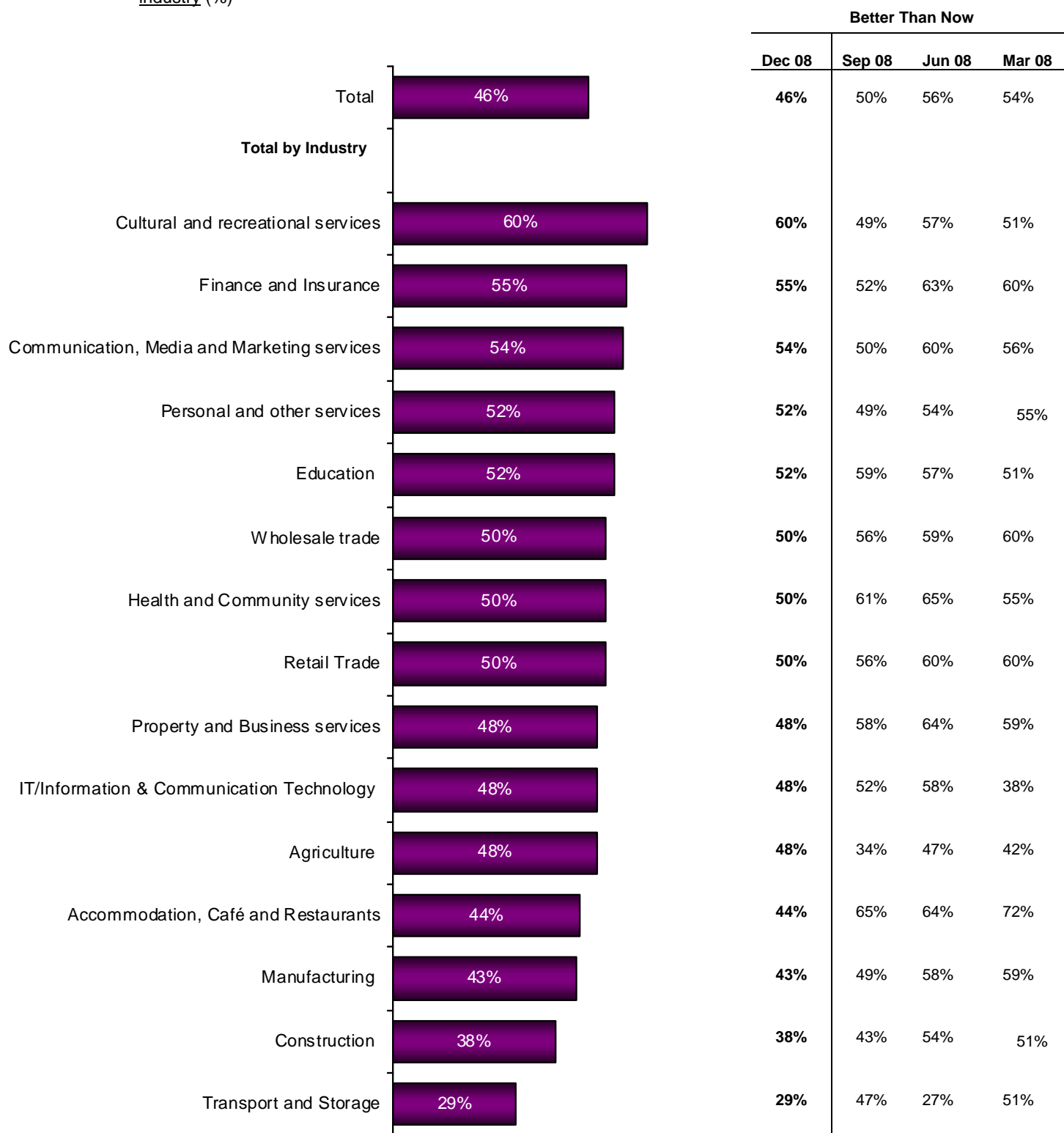


Figure 3.2: Performance outlook (better than now) for own business over the next 12 months by industry (%)



**Base:** Small business owners (n=1385)

Q: Now thinking about the performance outlook for your own business over the next 12 months, do you think your business will perform...better than now, worse than now, no change, don't know?

AMR Interactive, December 2008

Just under half (46%) of small business owners surveyed believe their business will perform better than now over the next 12 months.

Consistent with the previous quarter, Tasmania (54%) has the highest level of small business owners reporting a potentially better than now performance. In line with South Australia having one of the lowest confidence levels in business prospects, small business owners in South Australia are also shown to have the lowest levels of reporting a better than now performance over the next 12 months, with only 32% reporting a better than now performance outlook.

Small business owners in the Transport and Storage industry have by far the least confident performance outlook, with only 29% reporting a better than now performance. This is more than half the performance outlook of Cultural and Recreational Service (60%) who are the most confident sector.

## Factors underpinning expectations for business performance

### Consumer/end user trend changing favourably is sited as the most common reason for expecting a better than now performance

Table 1: Factors underpinning small businesses' expectations for future business performance (%)

Factor	Expectation for Future Business Performance		
	Better than now (n=637)	Worse than now (n=173)	No Change (n=480)
Current tax levels	5%	15%	16%
Future proposed tax changes - going up	4%	6%	5%
Future proposed tax changes - going down	5%	1%	2%
Petrol prices too high	7%	25%	18%
Petrol prices forecast reduction	17%	1%	7%
Employment market favourable for employers	6%	3%	3%
Lack of available trained workers to draw on	8%	12%	8%
Increase in Government investment in my industry	9%	1%	4%
Decrease in Government investment in my industry	1%	14%	6%
Increase in competitive activity	13%	<b>32%</b>	<b>24%</b>
Decrease in competitive activity	14%	6%	4%
Organic growth of my industry is increasing	<b>28%</b>	1%	5%
Decline in growth rate of my industry	3%	<b>49%</b>	18%
Consumer/end user trends changing favourably	<b>43%</b>	3%	9%
Consumer/end user trends changing unfavourably	3%	<b>53%</b>	19%
Other	15%	18%	11%

**Base:** Those who responded 'better than now', 'worse than now' or 'no change' to Q3 (n=1290)

Q: You mentioned that you expect your business to be... 'Better than now', 'Worse than now' OR 'Have no change' over the next 12 months, what are the factors underpinning your expectation? (Multiple choices)

AMR Interactive, December 2008

Of the small business owners who believe their business will perform better than now over the next 12 months (46% of sample), 43% of this group attributed this to consumer/end user trends changing favourably. This is followed by 28% who attribute this to having organic growth of their industry increase.

Of those small business owners who foresee a worse than now performance (12% of sample), this is largely attributed to consumer/end user trends changing unfavourably (53%), a decline in the growth rate of their industry (49%) and increase in competitor activity.

## Expectations for future economic performance

**More than half (58%) of small business owners surveyed expect the economy will perform worse than now over the next 12 months**

Figure 4: Performance outlook for the Australian economy over the next 12 months (%)

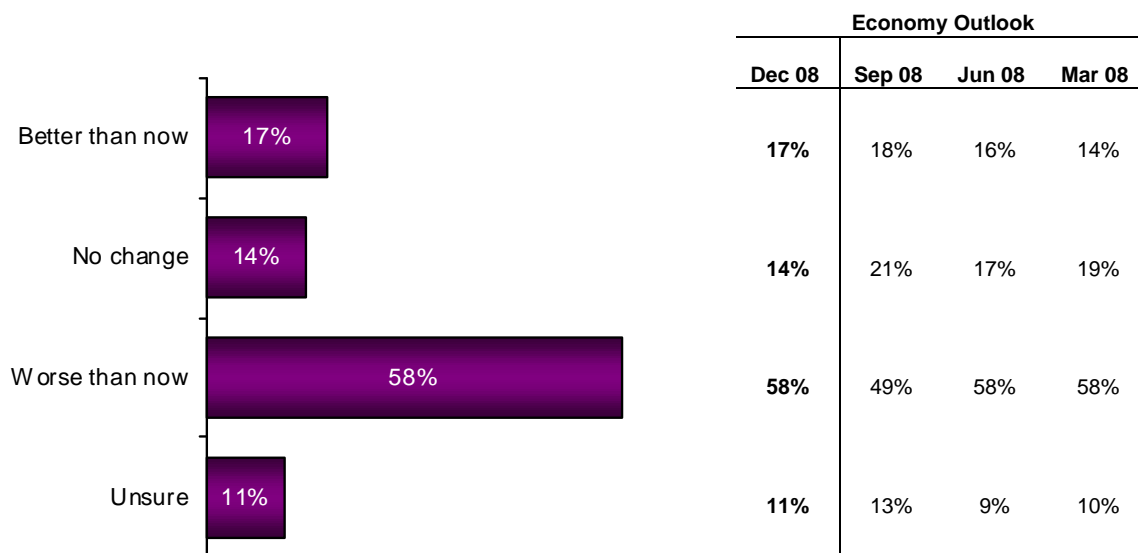


Figure 4.1: Performance outlook for the Australian economy over the next 12 months by state (%)

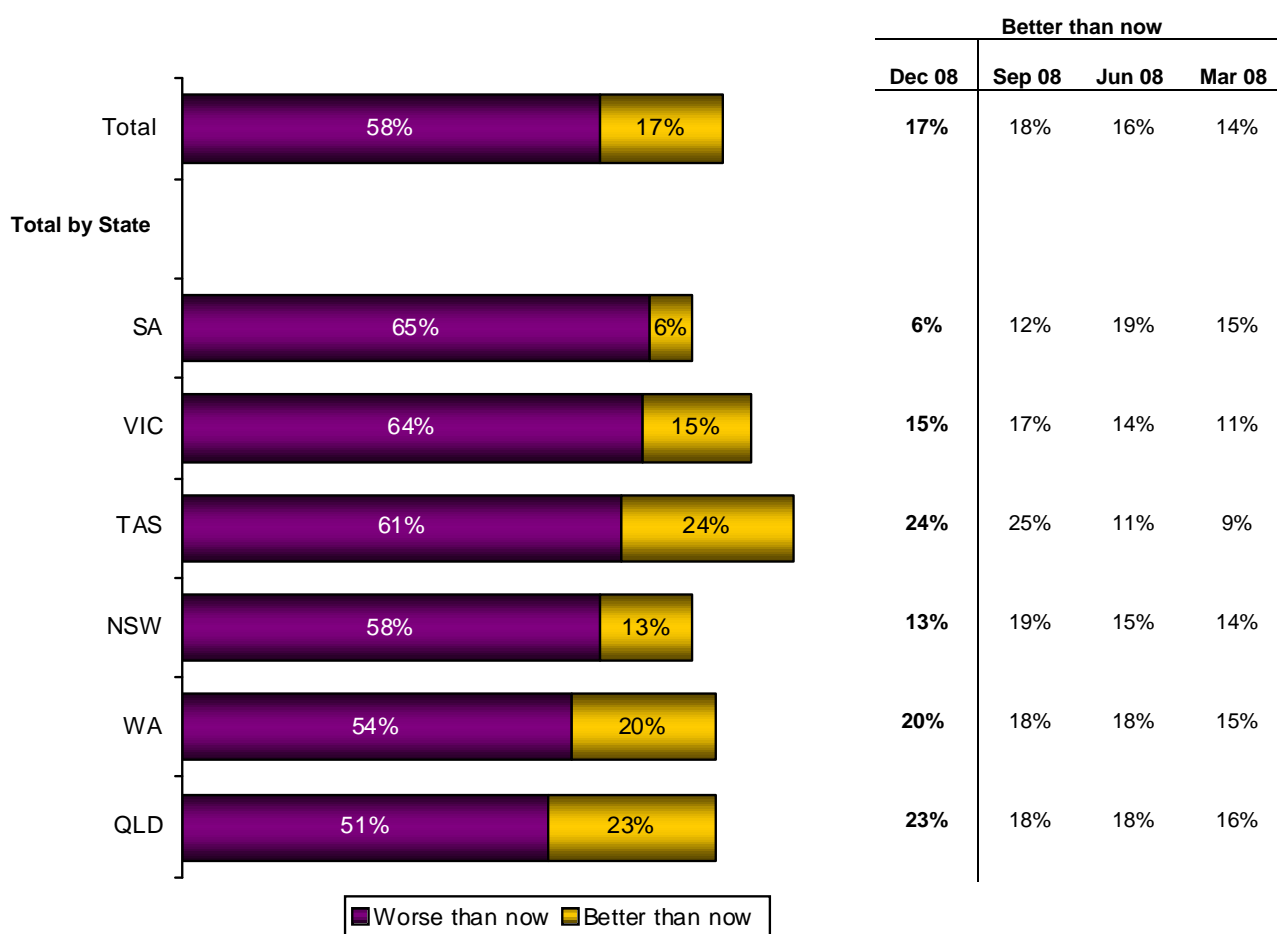
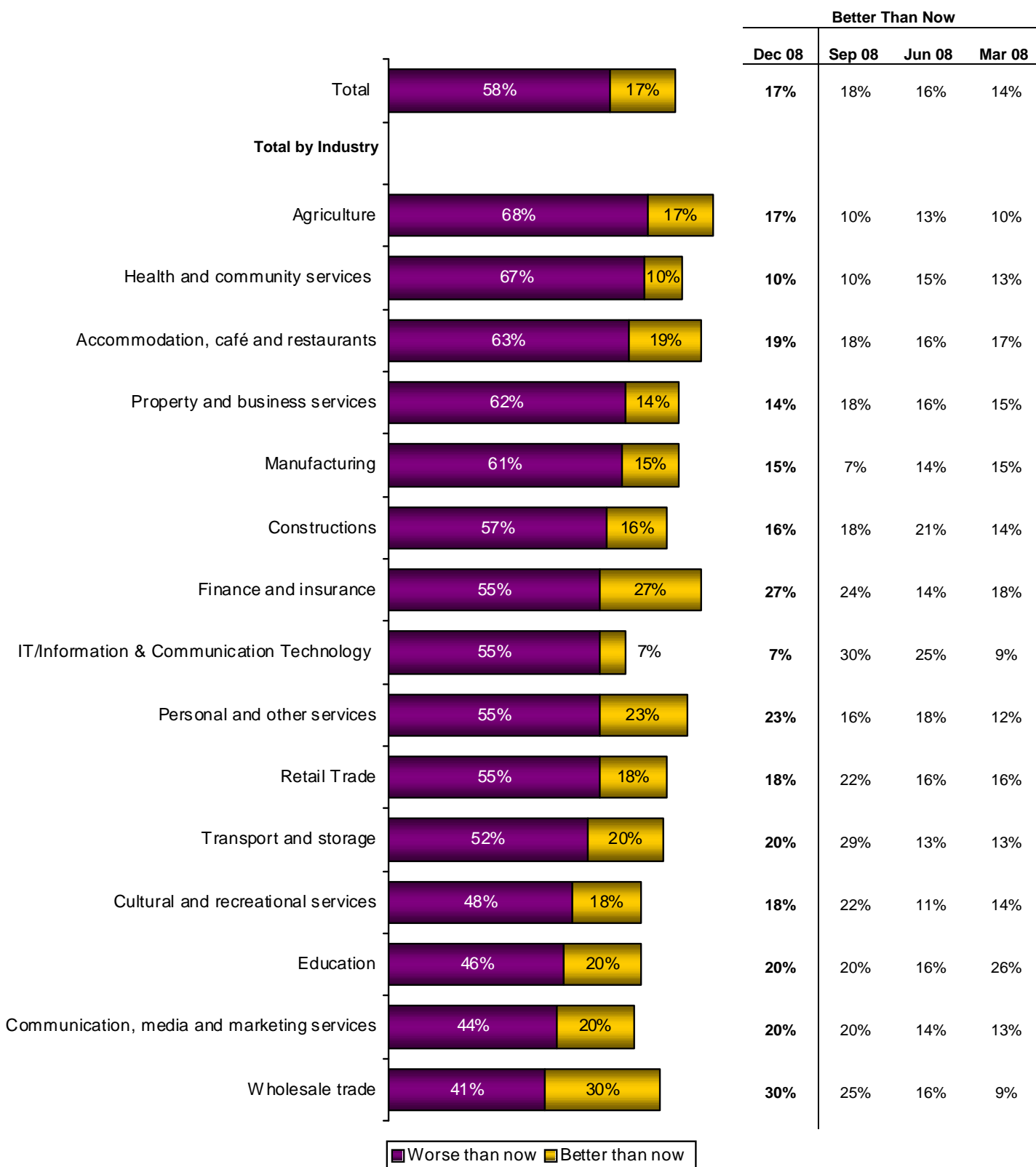


Figure 4.2: Performance outlook for the Australian economy over the next 12 months by industry (%)



Base: Small business owners (n=1385)

Q: Thinking more generally about the condition of the overall Australian economy over the next 12 months time, do you think it will perform... better than now, worse than now, no change, don't know?

AMR Interactive, December 2008



More than half (58%) of small business owners surveyed expect that the Australian economy will perform worse than now over the next 12 months. While only 17% of small business owners surveyed reported expecting a better than now economic performance over the next 12 months, which is consistent with previous quarters.

Tasmania is again the most optimistic state, with 24% of small business owners surveyed expecting the Australian economy to perform better than now over the next 12 months. This is followed by Queensland with 23%. Only 6% of small business owners in South Australia reported having a positive outlook for the Australian economy.

A total of 30% of small business owners in the Wholesale Trade industry expect a better than now performance from the Australian economy, along with 27% of small business owners in the Finance and Insurance industry.

## Perceptions of Federal Government performance

**Just under half (47%) of small business owners surveyed report a poor contribution to small business by the Federal Government**

Figure 5: Federal Government's contribution to the development of small business in Australia (%)

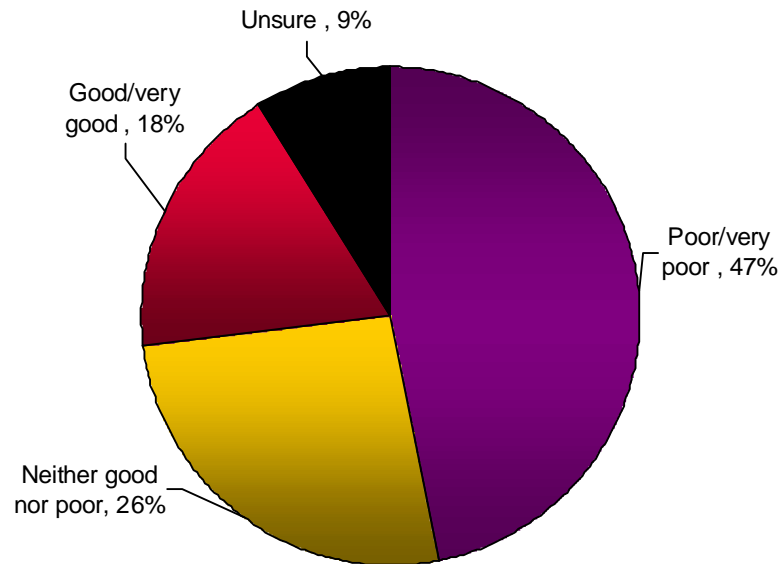


Figure 5.1: Federal Government's contribution to the development of small business in Australia by state (%)

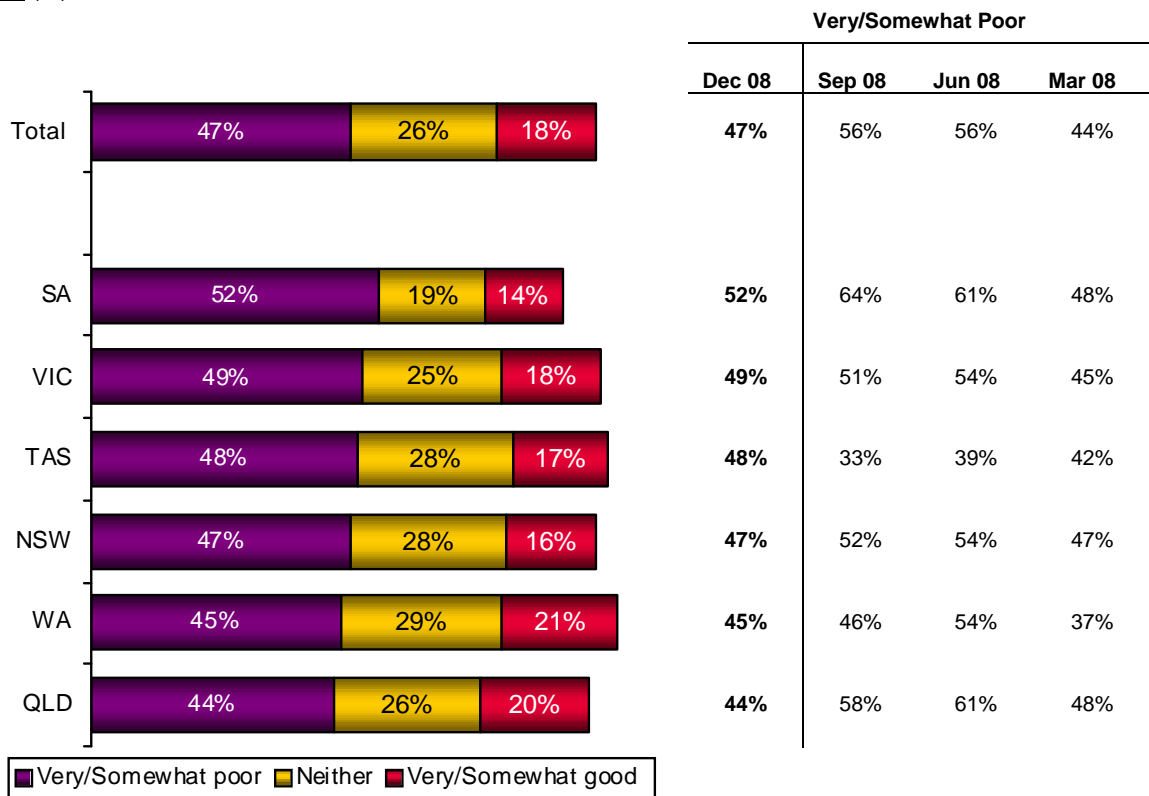
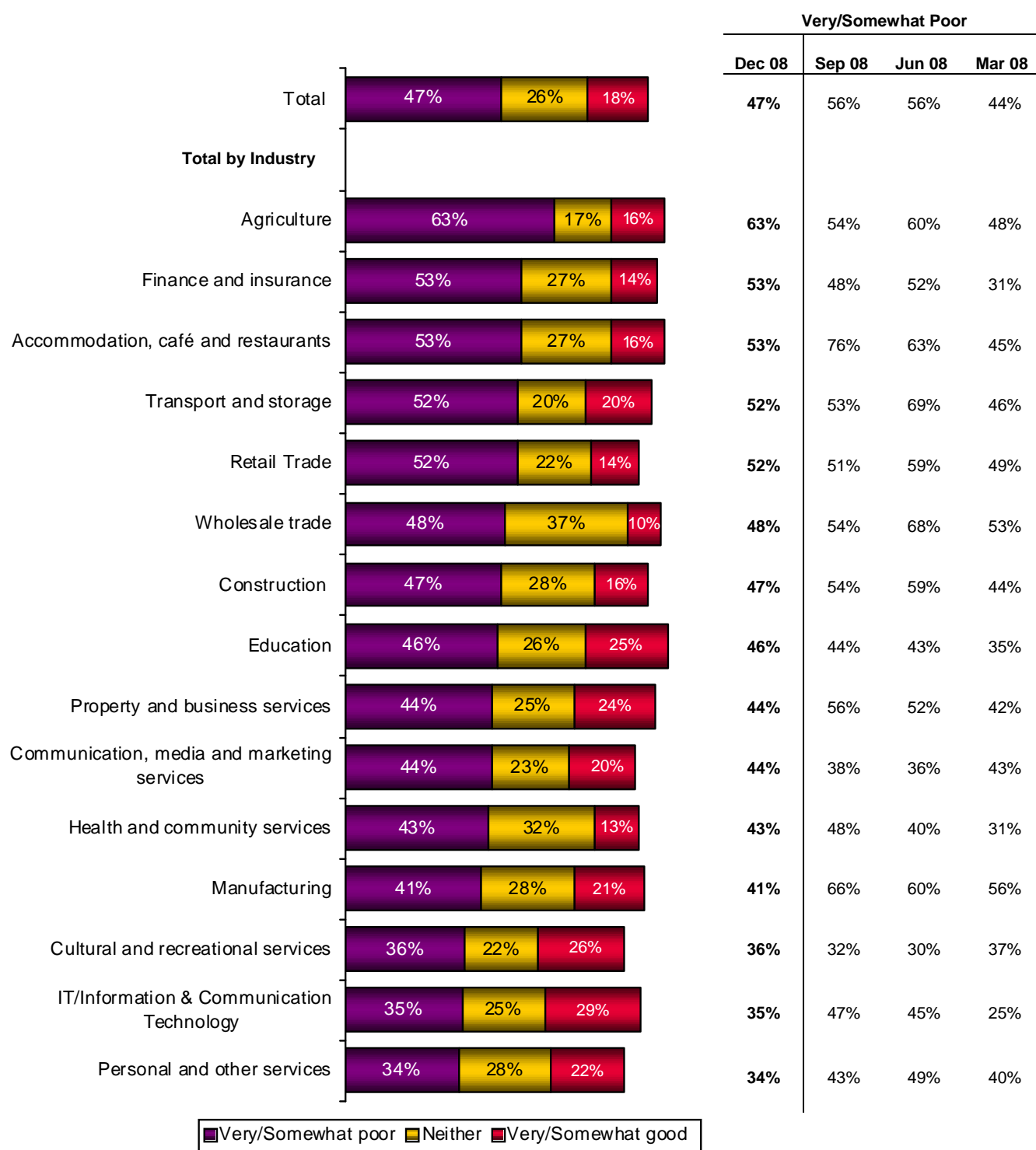


Figure 5.2: Federal Government's contribution to the development of small business in Australia by industry (%)



**Base:** Small business owners (n=1385)

Q: How would you rate the Federal Government's current performance in contributing to the development of small business in Australia?

AMR Interactive, December 2008

Just under half (47%) of small business owners surveyed report a poor or very poor performance by the Federal Government in their contribution to the development of small

business in Australia. This represents a 9% decline in the negative performance rating since September 2008 and June 2008 (both 56%).

All states, with the exception of Tasmania, have seen a decrease in small business owners reporting negative performance, with Queensland seeing the biggest decline of 14% since September 2008 and 17% since June 2008. Tasmania on the other hand, has seen a 15% increase in negative performance rating.

## Perceptions of State Government performance

### 59% of small business owners surveyed report a poor contribution to small business by their State Government

Figure 6: State Government's contribution to development of small business (%)

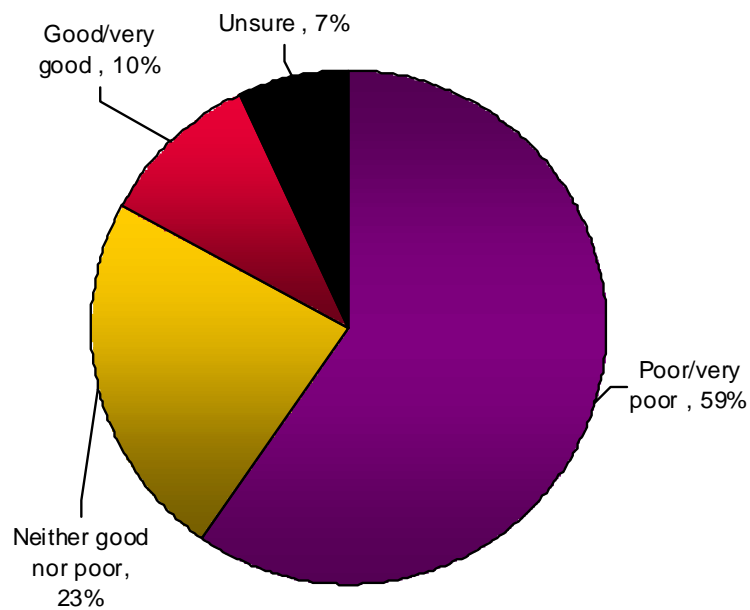


Figure 6.1: State Government's contribution to development of small business by state (%)

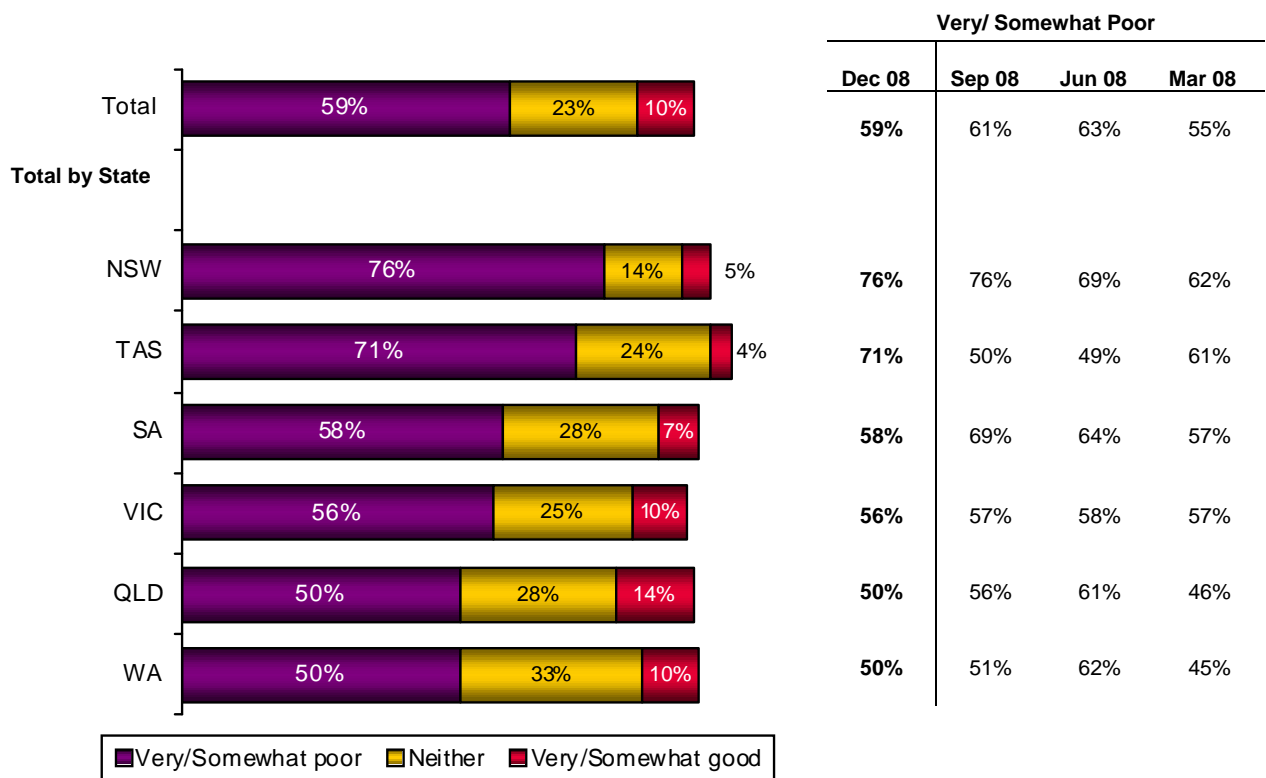
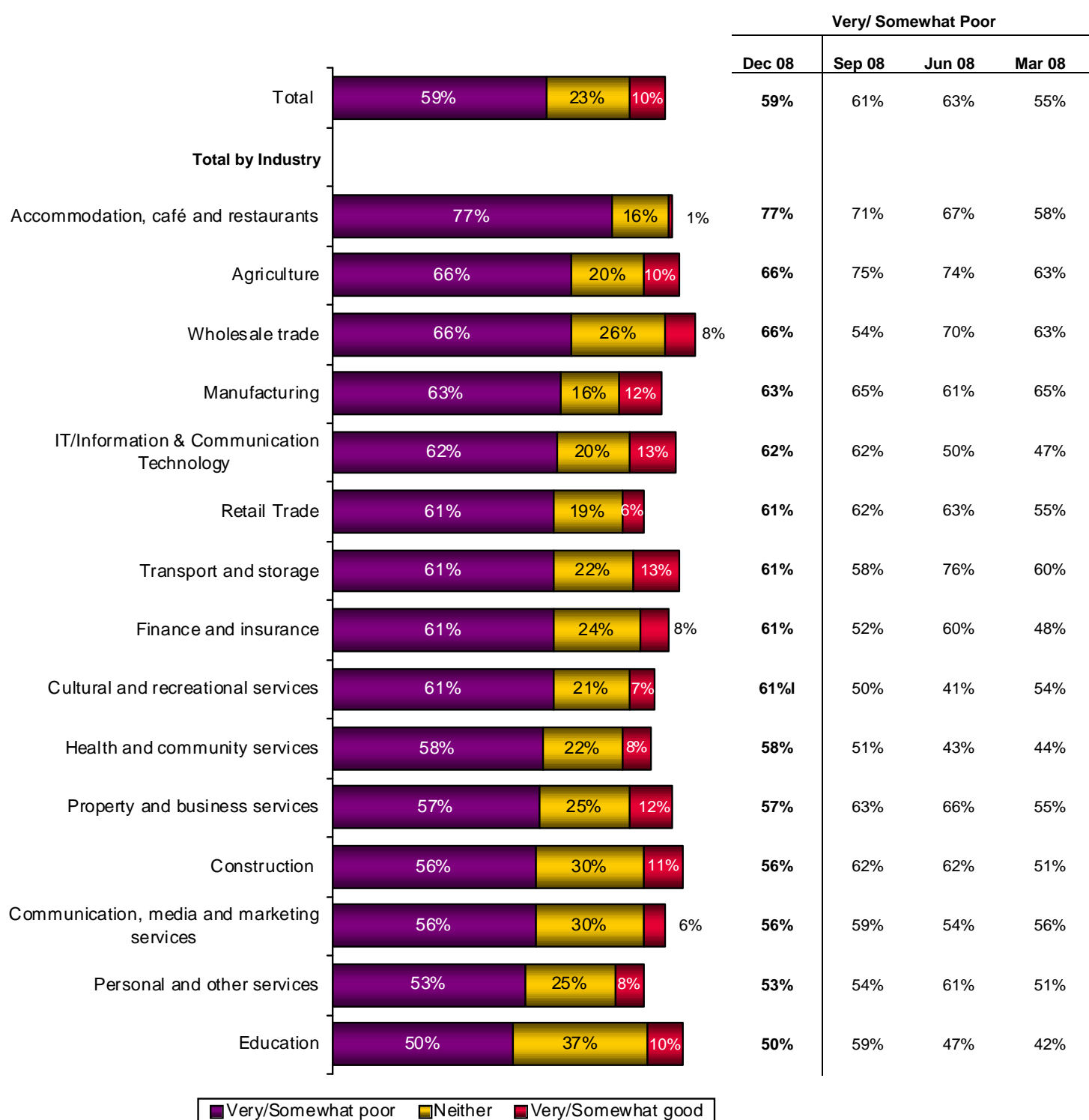


Figure 6.2: State Government's contribution to development of small business by industry (%)



**Base:** Small business owners (n=1385)

Q: How would you rate the State Government's current performance in contributing to the development of small business in Australia?

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More than half (59%) of the small business owners surveyed are currently unhappy with their State Governments contribution to small business, with 31% of this group rating the State Governments contribution as very poor.

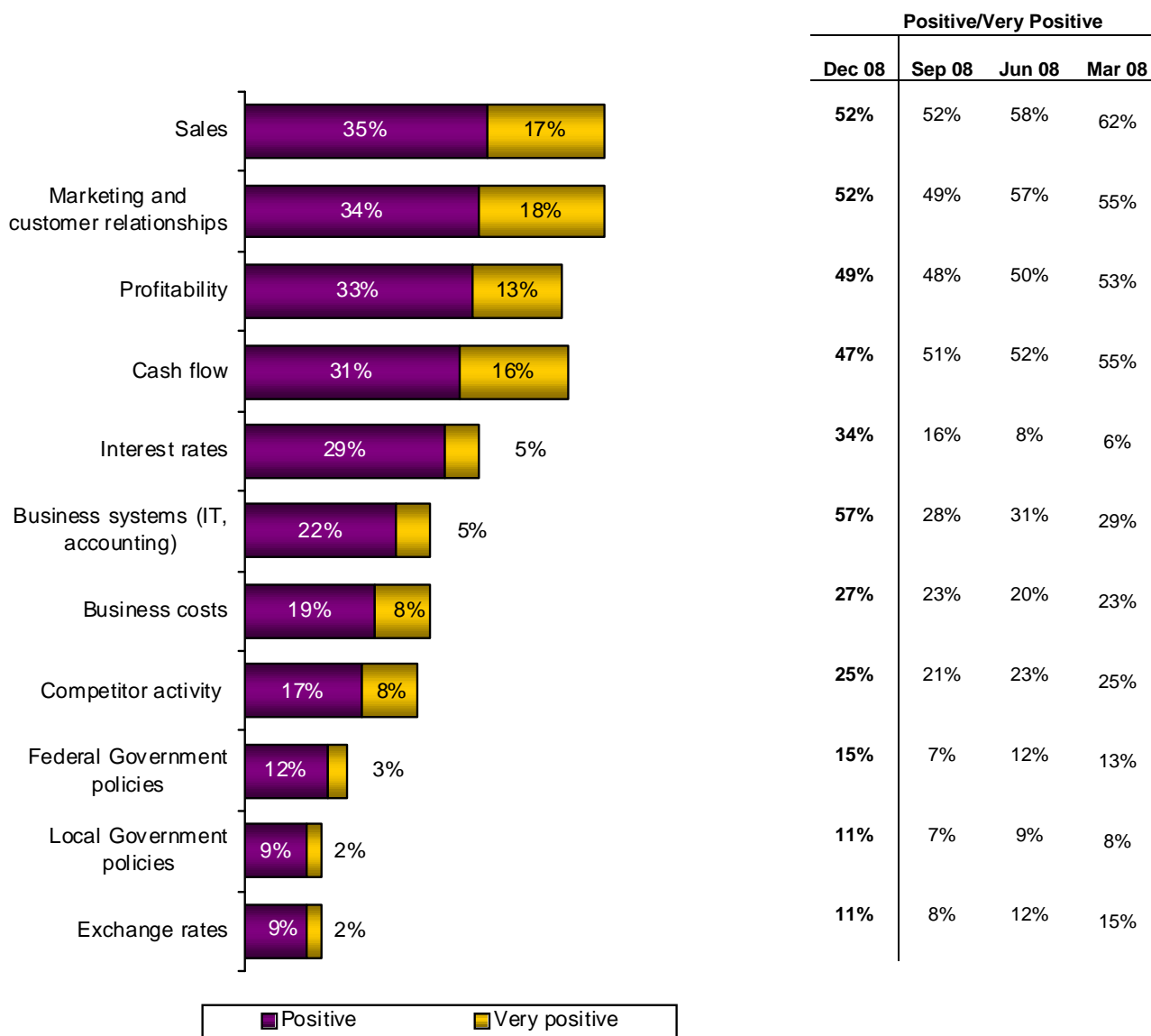
Small business owners in New South Wales are currently the most dissatisfied state with their State Government, with 76% of small business owners reporting a poor or very poor contribution to the development of small business. This is consistent with the results from September 2008.

Also consistent with the previous quarter, small business owners in Western Australia are the happiest with their State Government's contribution with only 50% reporting a poor or very poor performance.

## Outlook for specific business issues (positive)

### Sales remain the most positive issue for small business owners

Figure 7: Small business owners with positive outlook on specific issues (%)



**Base:** Small business owners (n= 1385)

Q: Listed below are a number of issues that your business will deal with over the next 12 months. Thinking only about your own business, please indicate your outlook for each of these issues, where 1 = very negative outlook, 2 = somewhat negative outlook, 3 = neutral, 4 = somewhat positive outlook and 5 = very positive outlook.

(If this is not applicable to your business, select 6)

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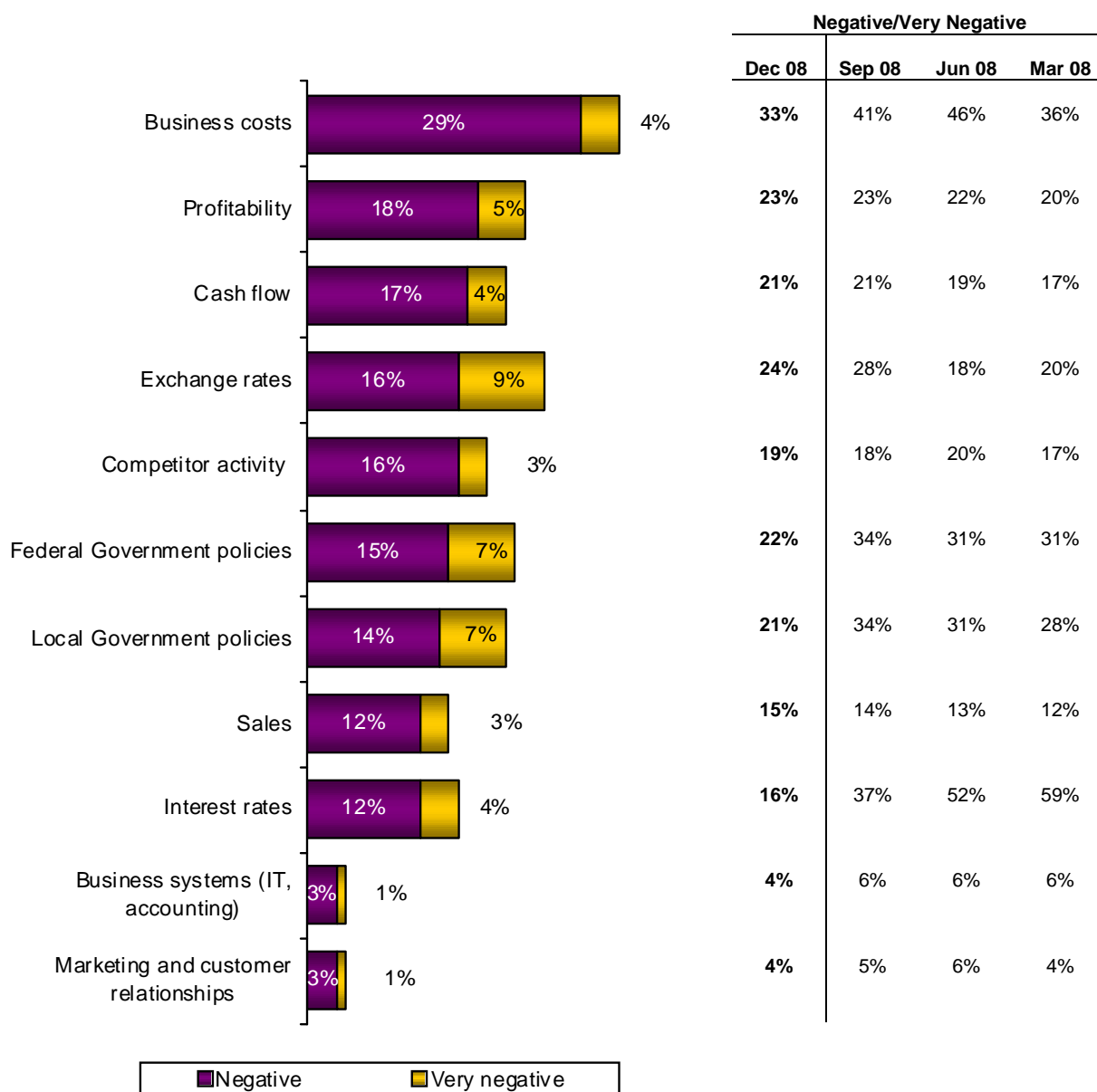
As with previous quarters Sales is the issue small business owners look upon most favourably, with 52% reporting a positive or very positive outlook for Sales. The outlook for Marketing and customer relationship is also reported as positive or very positive by 52% of small business owners.



## Outlook for specific business issues (negative)

### Business costs have the most negative outlook

Figure 8: Small business owners with negative outlook on specific issues (%)



**Base:** Small business owners (n=1385)

Q: Listed below are a number of issues that your business will deal with over the next 12 months. Thinking only about your own business, please indicate your outlook for each of these issues, where 1 = very negative outlook, 2 = somewhat negative outlook, 3 = neutral, 4 = somewhat positive outlook and 5 = very positive outlook. (If this is not applicable to your business select 6)

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The most negatively received issue for small business owners is the outlook for business costs, with 33% of small business owners surveyed reporting a negative or very negative outlook. This is followed by exchange rates, with 24% of small business owners reporting a negative or very negative outlook.

**Outlook for business revenue**

**44% of small business owners surveyed believe their business revenue will increase over the next 12 months**

Figure 9: Outlook for own business revenue in the next 12 months (%)

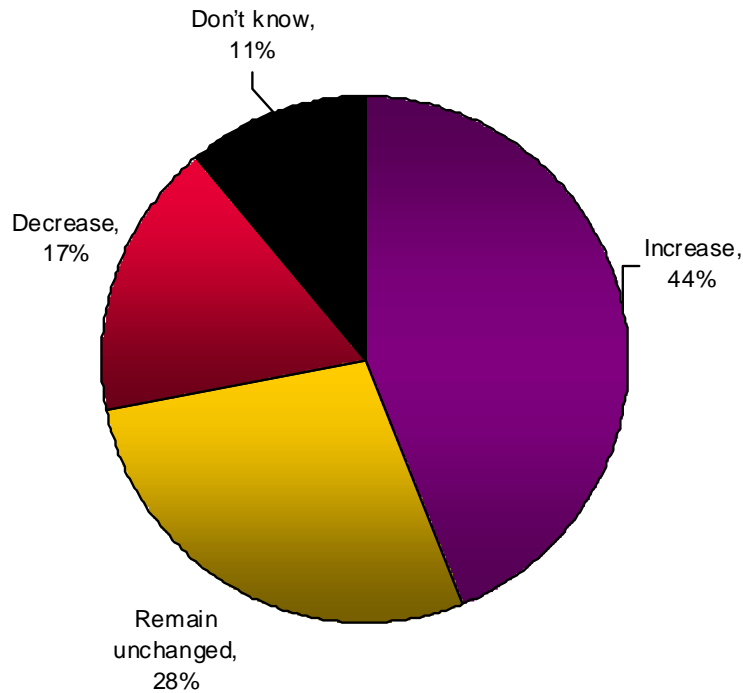


Figure 9.1: Outlook ('increase') for own business revenue in the next 12 months by state (%)

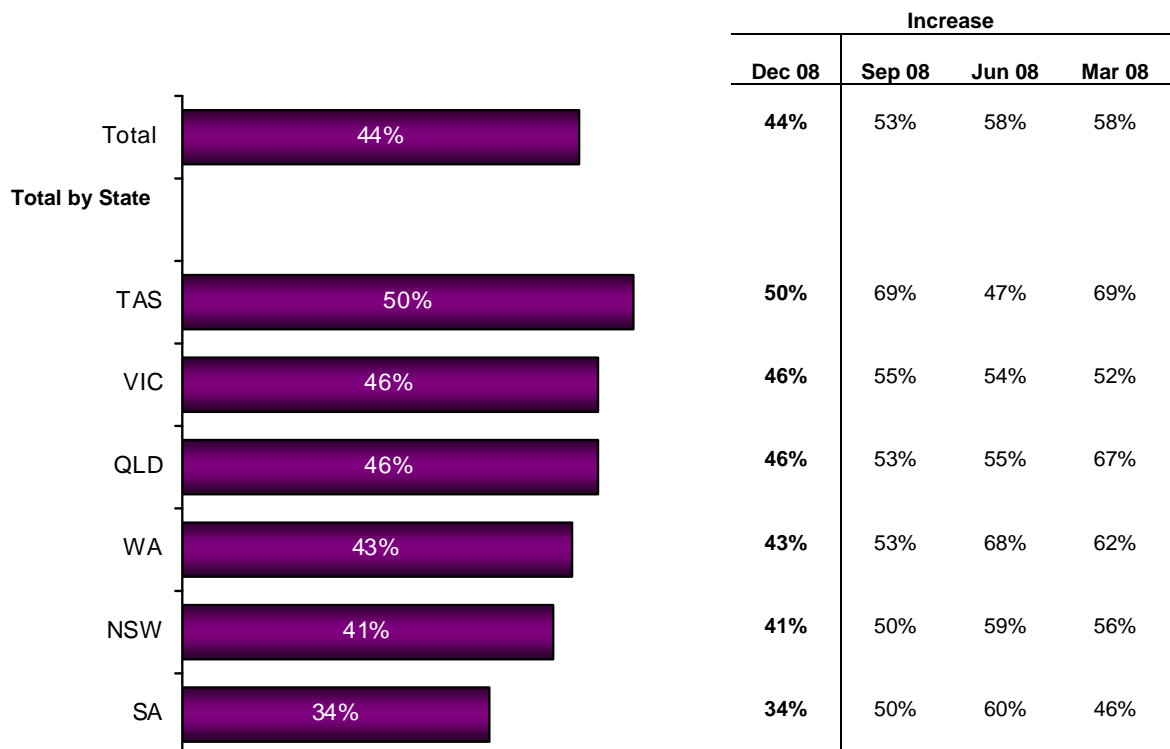
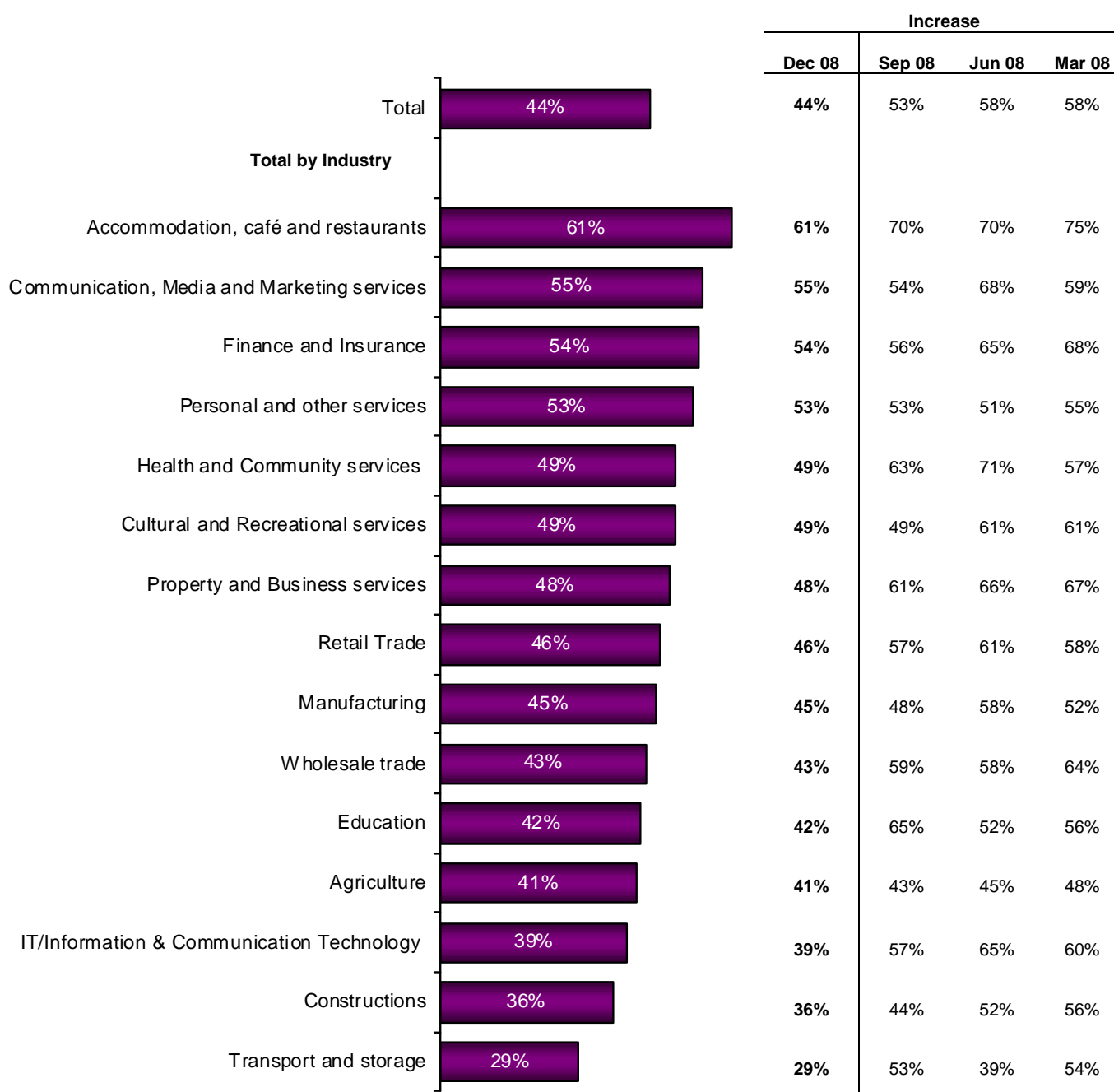


Figure 9.2: Outlook ('increase') for own business revenue in the next 12 months by industry (%)



**Base:** Small business owners (n=1385)

Q: Do you expect your business revenue to increase, decrease or remain unchanged in the next 12 months?

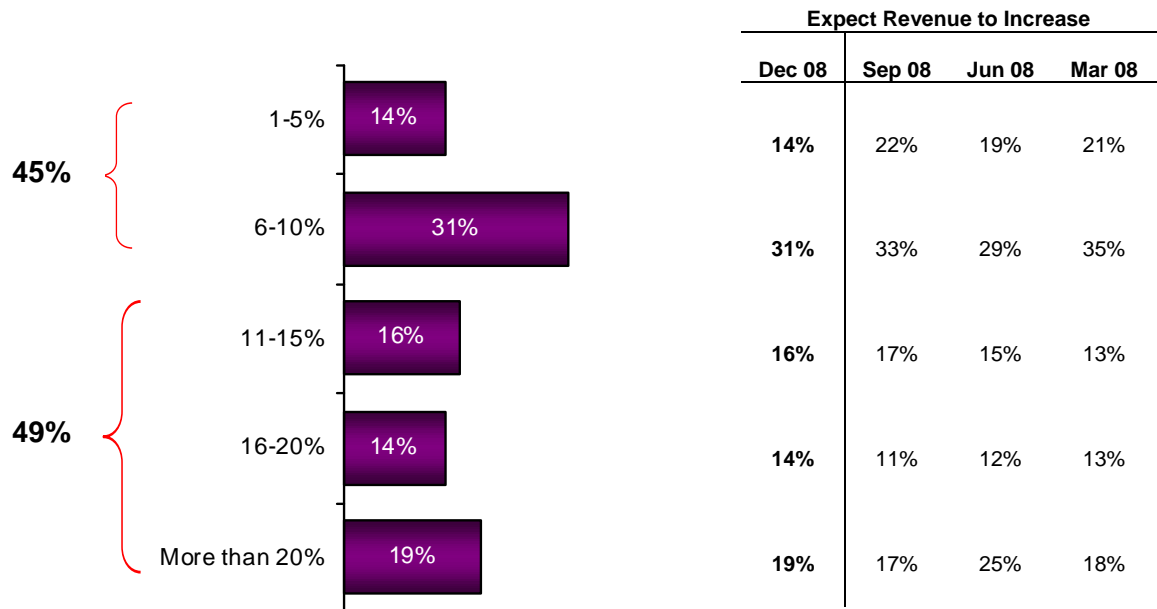
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Consistent with the 46% of small business owners who reported an expected better than now performance of their business over the next 12 months, 44% of small business owners surveyed expect an increase in business revenue over the next 12 months.

## Expectations for increases in business revenue

**Of those small business owners who expect their revenue to increase (44%), the most common increase in revenue expected by this group is between 6 and 10%**

Figure 10: Percentage of increases in own business revenue in the next 12 months (%)



**Base:** Small business owners that expect their revenue to increase in the next 12 months (n=606)

**Q:** How much do you expect your revenue to increase in the next 12 months?

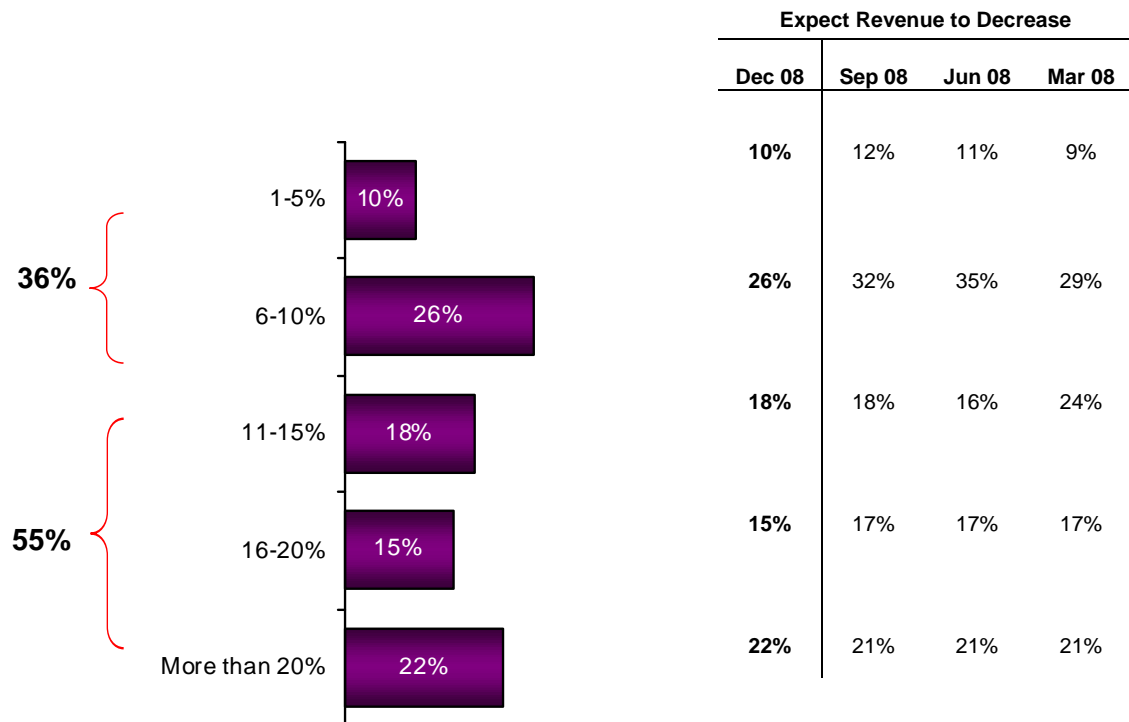
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Of those small business owners who expect an increase in revenue over the next 12 months (44% of sample), 31% of this group expect this increase to be between 6 and 10%.

## Expectations for decreases in business revenue

**Of those small business owners who expect their revenue to decrease (17%), more than half of this group expect their revenue decrease to be more than 11%**

Figure 11: Percentage of decreases in own business revenue in the next 12 months (%)



**Base:** Small businesses that expect their revenue to decrease in the next 12 months (n=234)

**Q:** How much do you expect your revenue to decrease in the next 12 months?

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Of those small business owners surveyed who expect a decrease in revenue over the next 12 months (17% of sample), 55% of this group expect this decrease to be more than 11%, with 22% of this group expecting the decrease to be more than 20%.

## Expectation of investing in own business

**One-third (37%) of small business owners surveyed expect to invest in their own business over the next 6 months**

Figure 12: Expectation of investing in own business in the next 6 months (%)

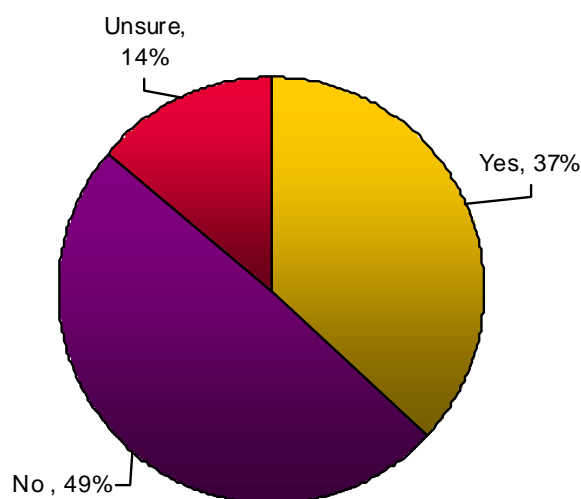
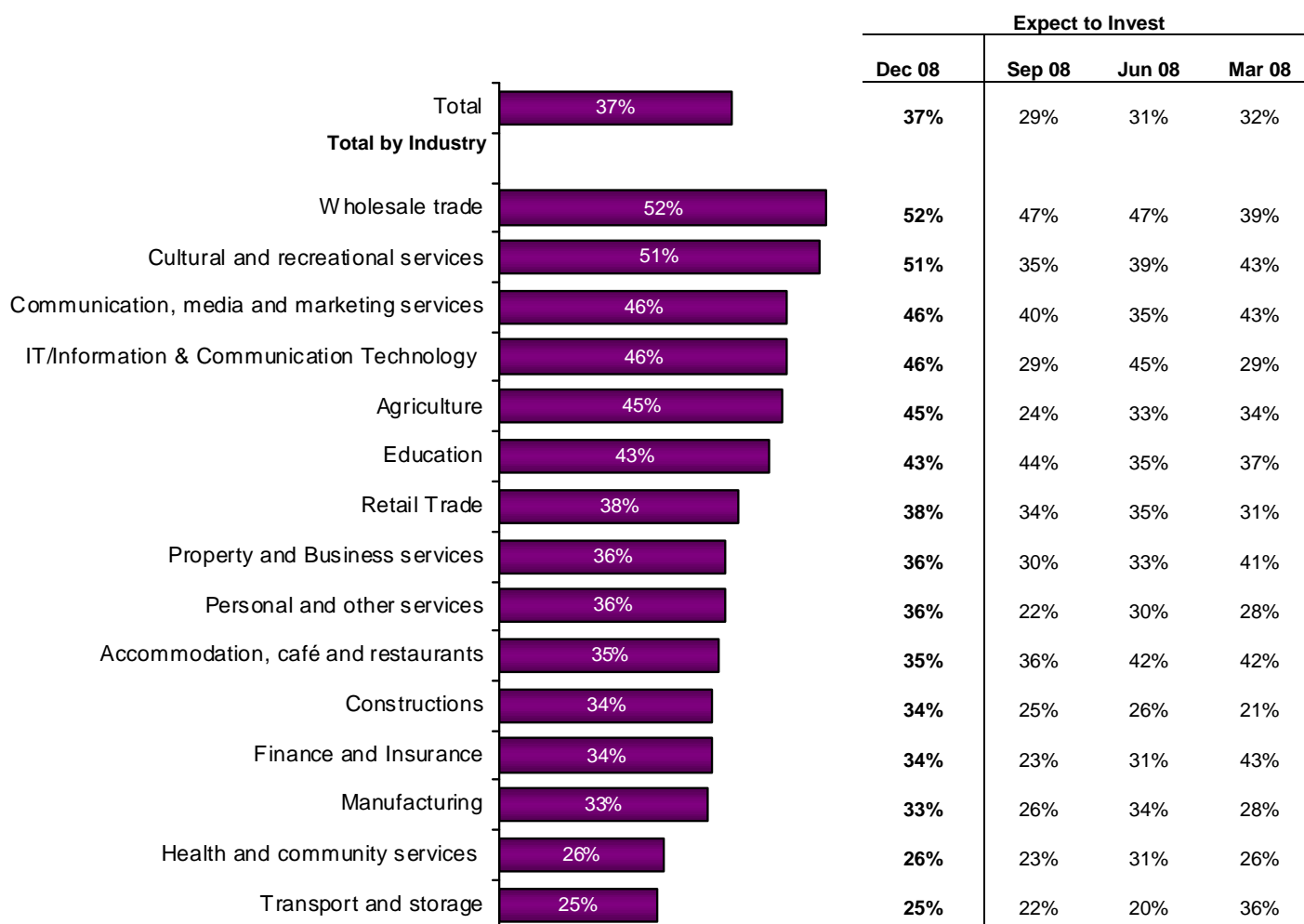


Figure 12.1: Expectation of investing in own business in the next 6 months by industry (%)



**Base:** Small business owners (n=1385)

**Q:** Within the next 6 months, do you expect to invest money in order to help your business grow?

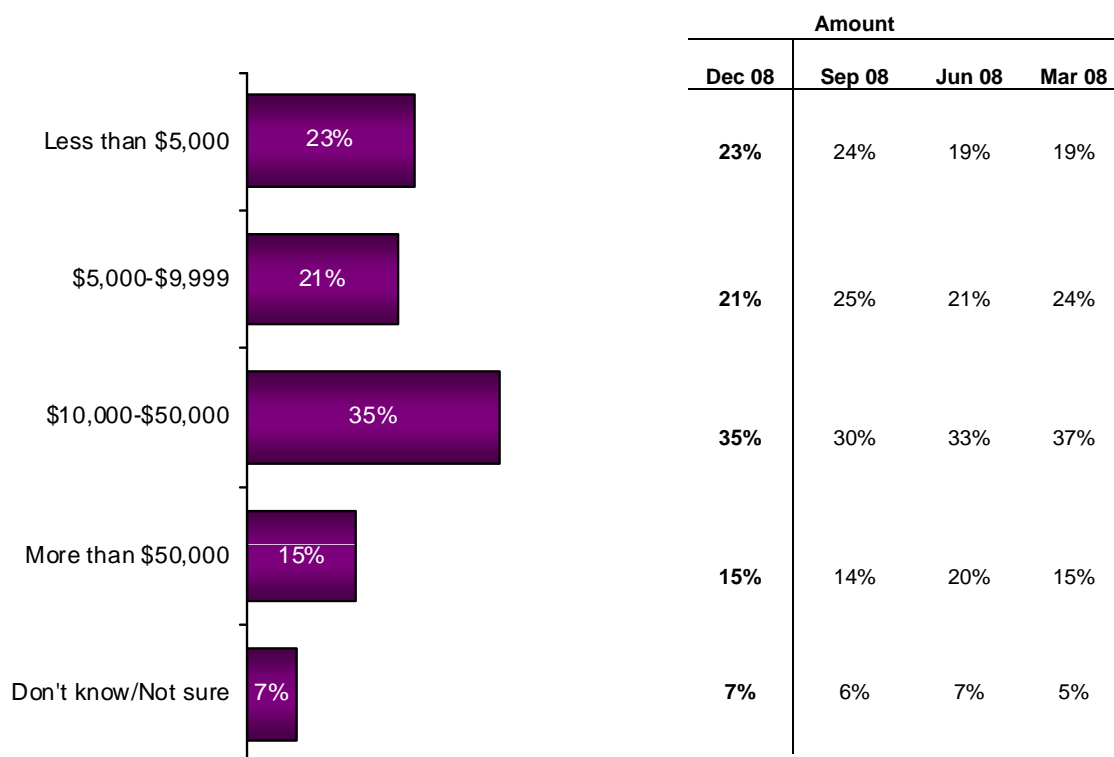
AMR Interactive, December 2008

While just under half (49%) of small business owners do not expect to invest in their own business in the next 6 months, 37% do intend on investing money in order to help their business grow.

### Expected amount of investment in own businesses

**Of the small business owners who expect to invest money in their own business (37%), one-third (35%) of this group expect to invest between \$10,000 and \$50,000**

Figure 13: Expected amount of investment in small business (%)



**Base:** Small business owners who intend on investing money in their business (n=515)

**Q:** Approximately how much do you expect to invest in the next 6 months to help grow your business?

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Of those small business owners who do intend on investing in their own business (37% of sample), the most common amount of investment is between \$10,000 and \$50,000 with 35% of this group reporting this amount. A total of 44% of these business owners expect to invest \$9,999 or less.



## Intention of employing or reducing staff

### 1 in 10 (14%) small business owners surveyed intend to hire employees in the next 12 months

Figure 14: Expectation of hiring or reducing employees within the next 12 months (%)

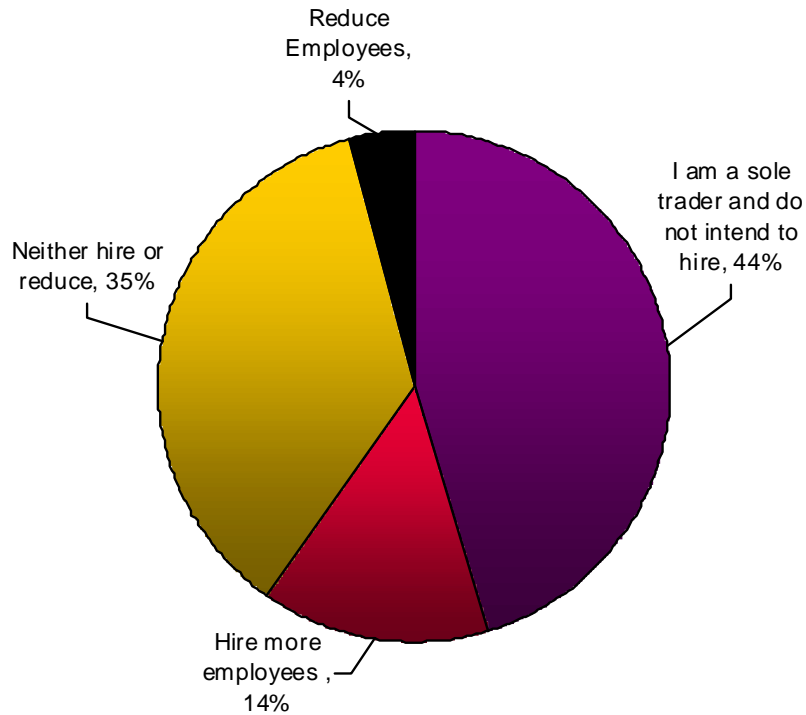


Figure 14.1: Expectation of hiring employees within the next 12 months by business size (%)

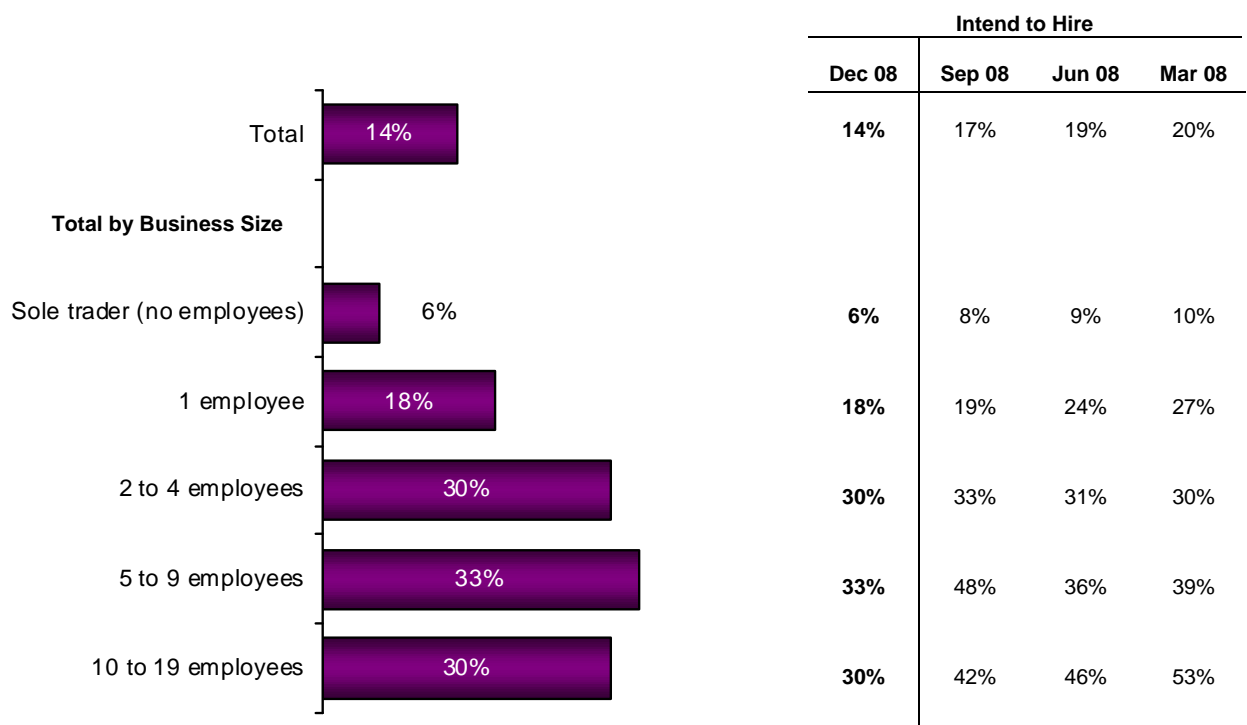
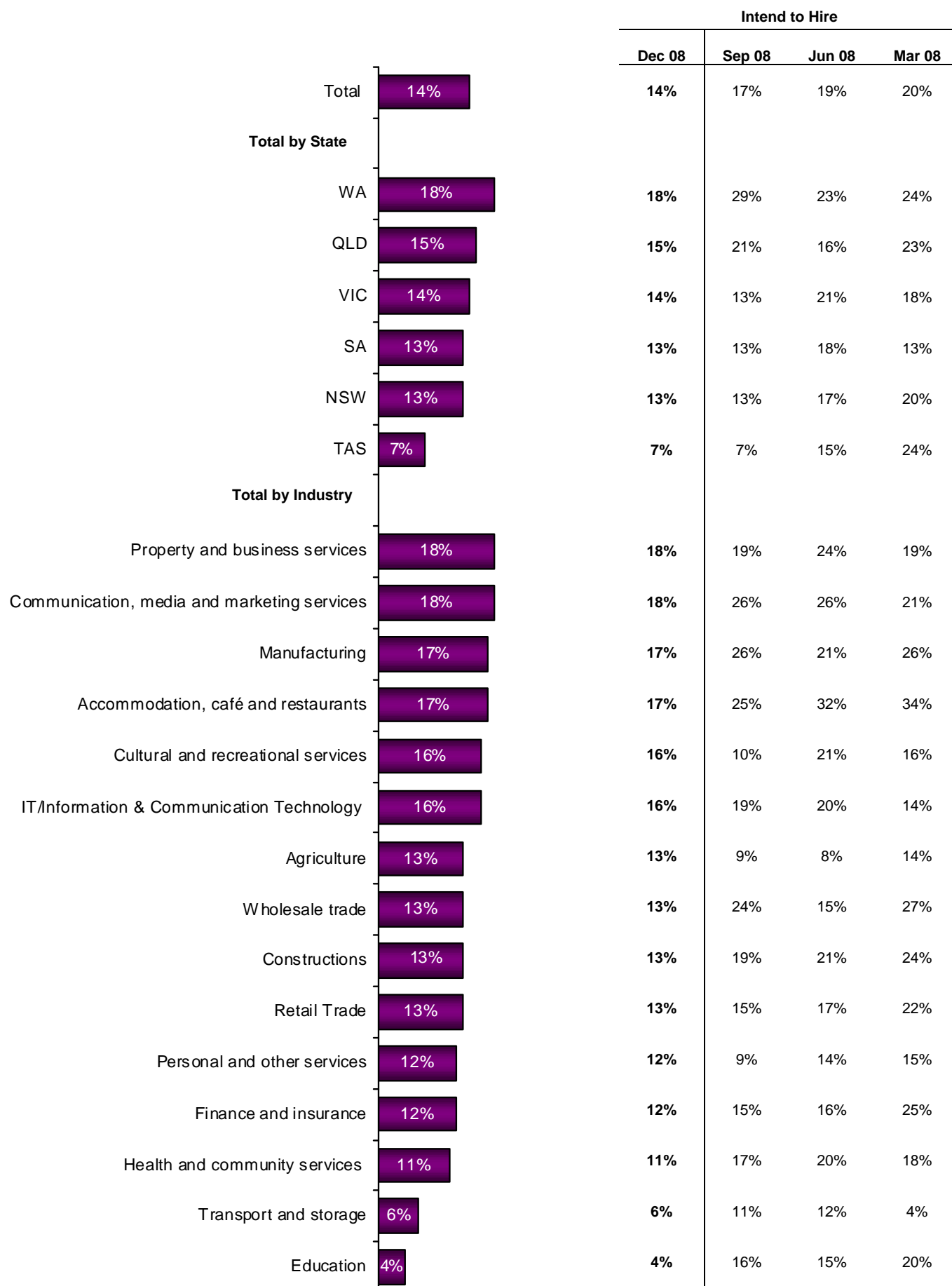


Figure 14.2: Expectation of hiring employees within the next 12 months by state and industry (%)



**Base:** Small business owners (n=1385)

**Q:** Do you intend to hire or reduce employees within the next 12 months?

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AMR Interactive, December 2008

There has been a slight decline in the number of small business owners who intend on hiring more employees over the coming 12 months, with only 14% intending to do so. A total of 35% do not intend on reducing or increasing the number of employees in their business.

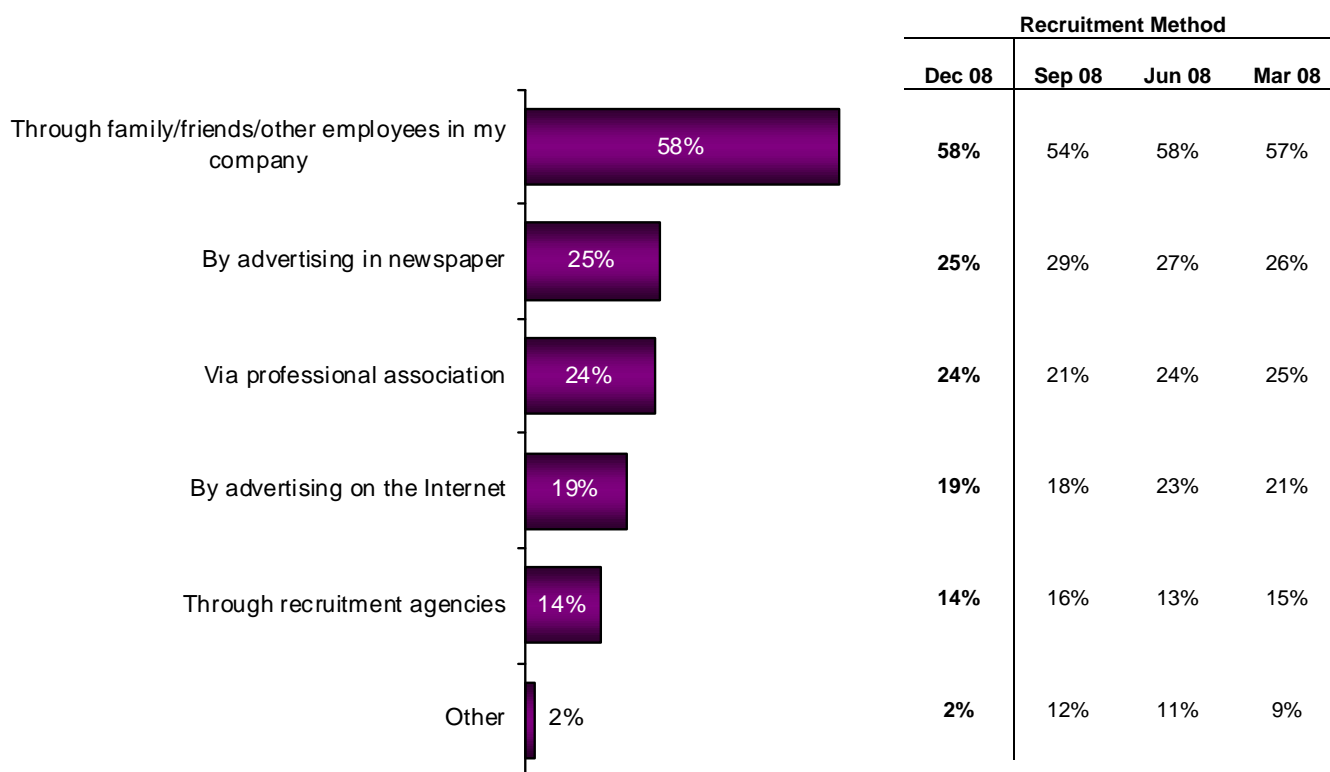
The number of larger small businesses (between 10 and 19 employees) who intend to employ more staff over the next 12 months has declined from previous quarters, with a 15% decline from September 2008 in businesses with 5-9 employees and a 12% decrease of those small businesses with between 10 and 19 employees.

Small businesses in Tasmania (7%), and also the Education sector (4%), are far less likely to be hiring than other small businesses in other industries.

**Preferred method of recruitment**

**Friends, family and other employees remains the most common source of finding new employees**

Figure 15: Method of seeking employees (%)



**Base:** Small businesses that have one or more employees (n=781)

Q: How do you find your employees? (Multiple responses)

AMR Interactive, December 2008

Of those small businesses with one or more employees, recruiting potential employees through family, friend and other employees (58%) remains the most common method for recruitment.

## Employee types

### The most common type of employee in small business is full-time

Table 2: Type of employees of small businesses (%)

Type of employees	Percentage of employees											
	0%				1%-33%	34%-66%	67%-99%	100%	Total 1%-100%			
	Dec 08	Sep 08	Jun 08	Mar 08	Dec 08	Dec 08	Dec 08	Dec 08	Dec 08	Sep 08	Jun 08	Mar 08
Full-time permanent	<b>39%</b>	56%	59%	59%	5%	10%	8%	36%	<b>59%</b>	41%	38%	39%
Part-time permanent	<b>78%</b>	84%	85%	83%	9%	3%	1%	7%	<b>20%</b>	12%	12%	14%
Contract	<b>87%</b>	90%	89%	89%	5%	1%	0%	5%	<b>11%</b>	8%	9%	7%
Casual	<b>80%</b>	83%	83%	83%	8%	3%	0%	6%	<b>17%</b>	14%	15%	14%
Other	<b>79%</b>	96%	96%	84%	0%	0%	0%	20%	<b>20%</b>	3%	3%	16%

**Base:** Small business owners (n=1385)

**Q:** What percentage of your employees are...full-time permanent, part-time permanent, contract, casual?

AMR Interactive, December 2008

As with previous quarters, the most common type of employee found in small business are full-time permanent.

**Domain name registered**

**Half (51%) of small business owners surveyed don't have a domain name registered**

Figure 16: Business having domain name registered (%)



**Base:** Small business owners (n=1385)  
**Q:** Does your business have a domain name registered?

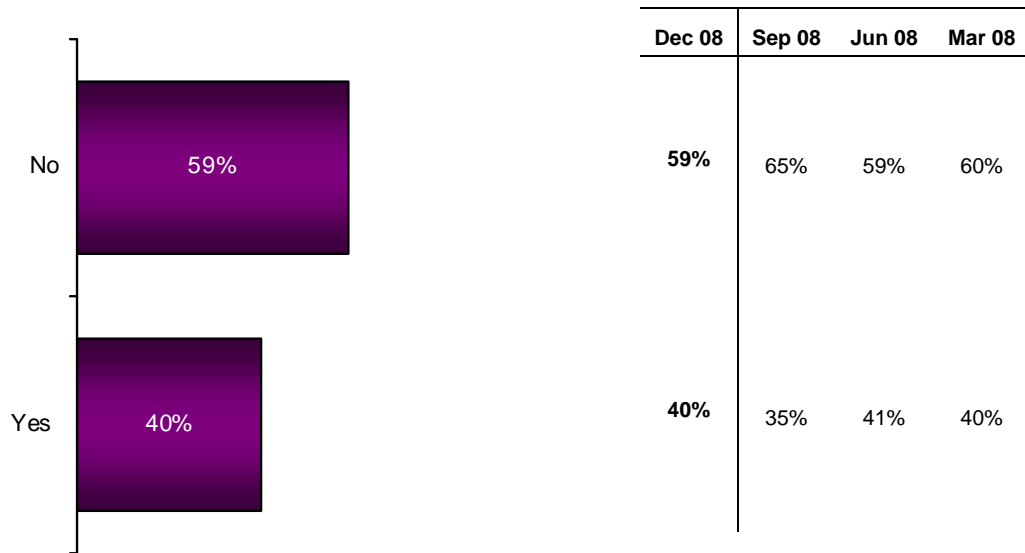
AMR Interactive, December 2008

While 51% of small business owners surveyed do not currently have a business domain name registered, 45% do.

**Business website**

**40% of small business owners surveyed have a website**

Figure 17: Businesses with a website (%)



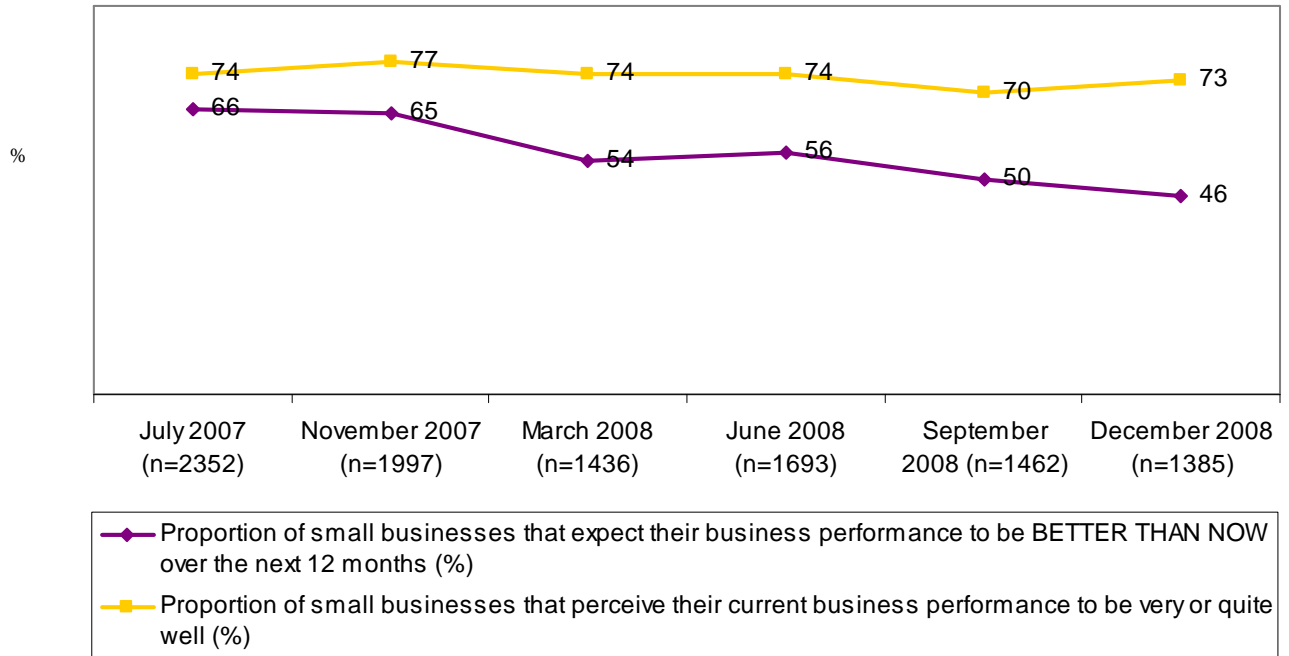
**Base:** Small business owners (n=1385)  
**Q:** Does your business have a website?

AMR Interactive, December 2008

More than half (59%) of small business owners surveyed do not currently have a business website, which is slightly lower than the results from the previous quarter. These results show an additional 5% of small business owners report having a website since the September 2008 survey results, taking the current 40% of small businesses with a website to almost mirror the results from June and March 2008.

## Appendix 1 – Perceptions of current and future business performance

Figure 21: Small businesses' confidence in business prospects and expectations for the economic performance over 12 months time



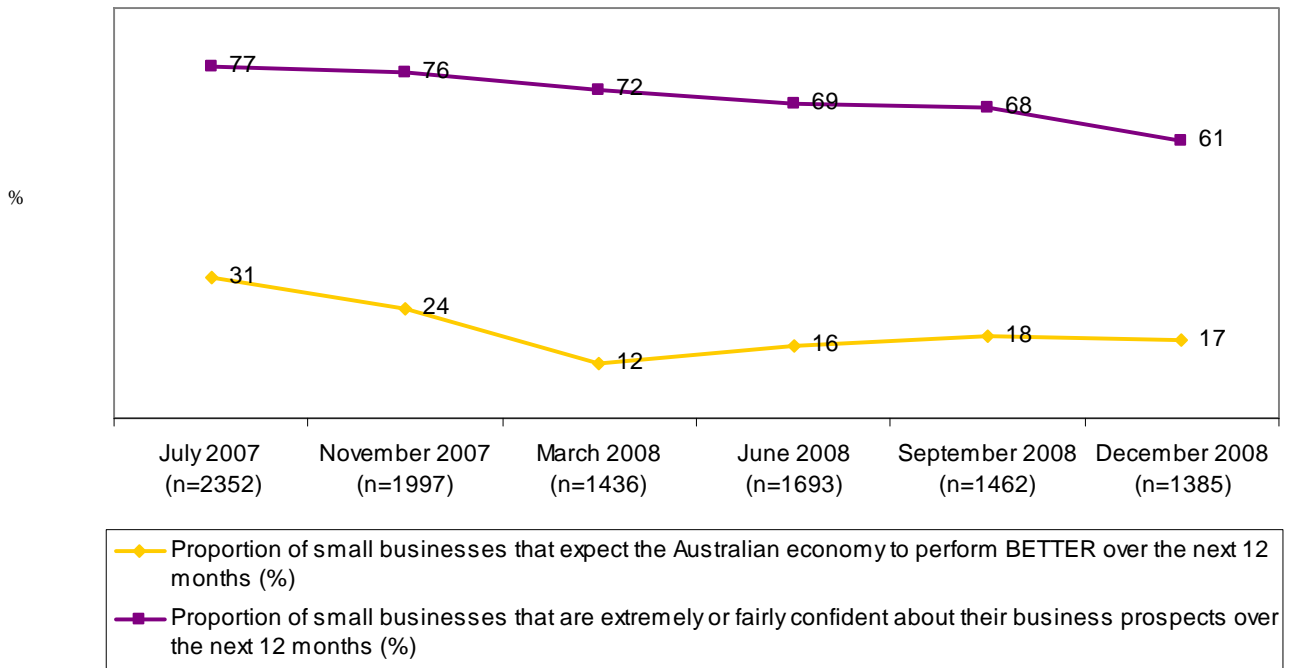
Base: Small business owners (n=1385)

AMR Interactive, December 2008



## Appendix 2 – Confidence in business & economy outlook

Figure 22: Small businesses' confidence in business prospects and expectations for the economic performance over 12 months time



Base: Small business owners (n=1385)

AMR Interactive, December 2008

### Appendix 3 – Positive & negative outlook for specific business issues

Figure 23: Proportion of small businesses with POSITIVE outlook for specific business issues over the next 12 months

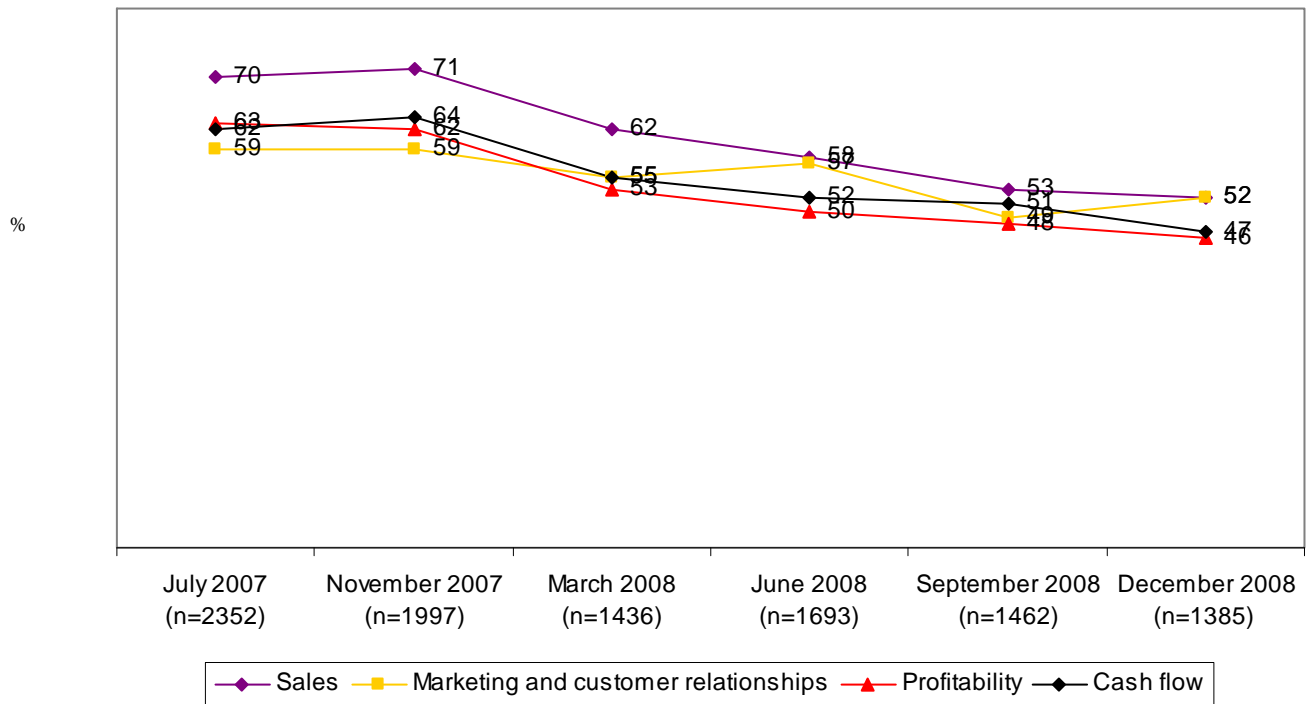
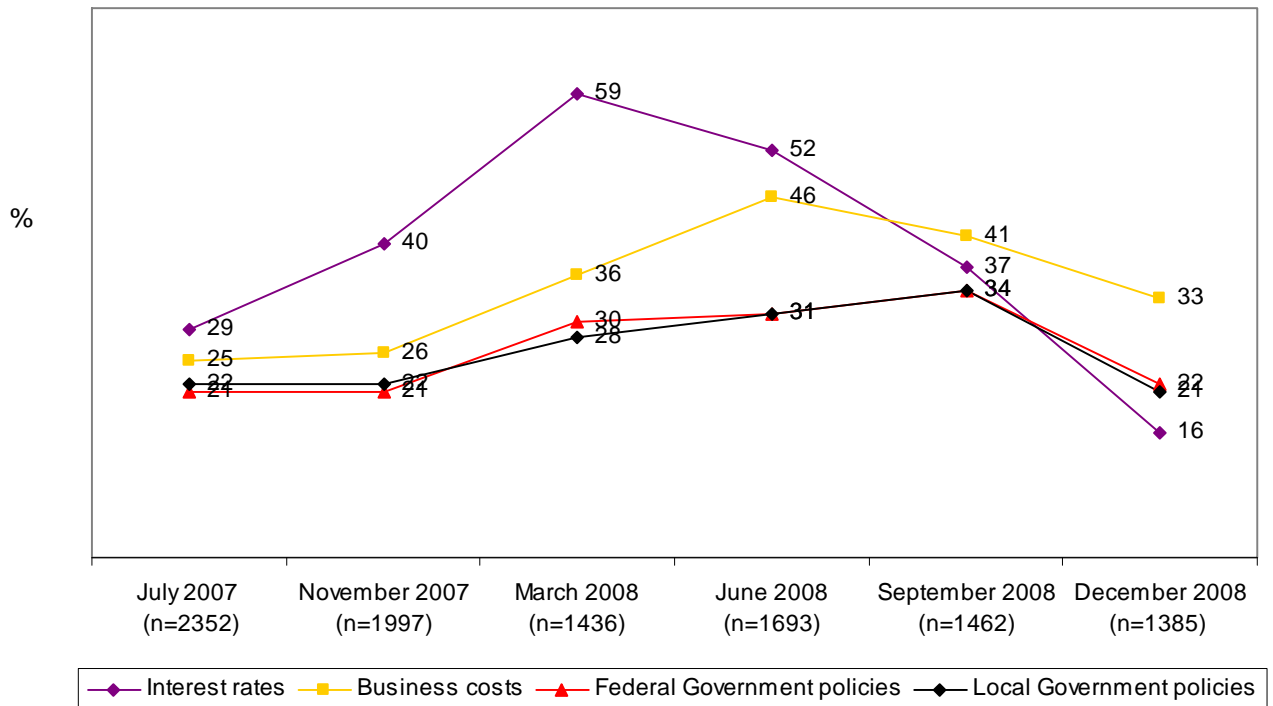


Figure 23.1: Proportion of small businesses with NEGATIVE outlook for specific business issues over the next 12 months

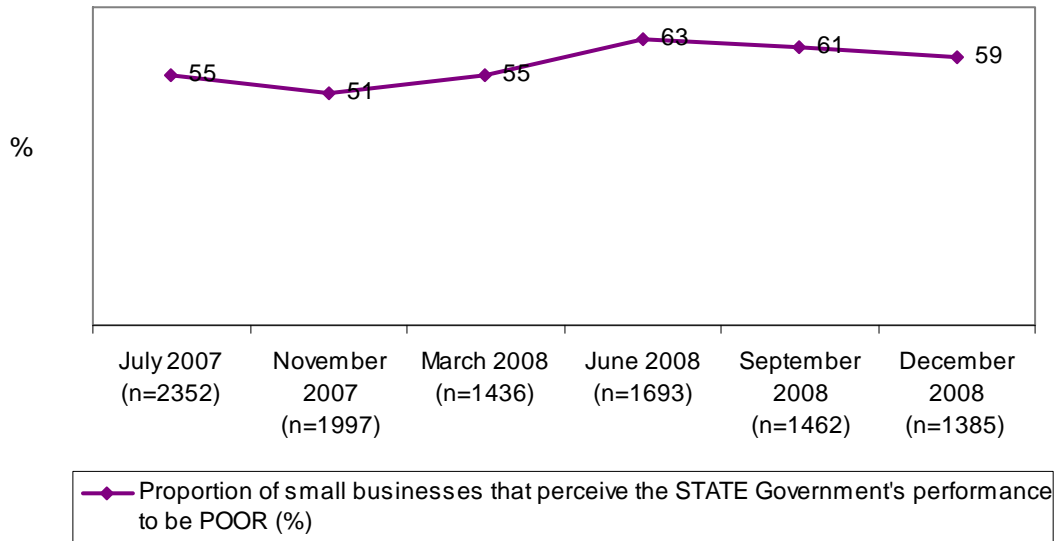


Base: Small business owners (n=1385)

AMR Interactive, December 2008

## Appendix 4 – Perceptions of State Government performance

Figure 24: Small businesses' perceptions of the State Governments' performance in contributing to the development of small business in Australia



Base: Small business owners (n=1385)

AMR Interactive, December 2008

## Appendix 5 – Survey questions

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S1. Are you the owner, general manager, or a key decision-maker of this Business?

1. Business owner
2. General Manager but not a business owner
3. Key decision maker
4. Other (specify)

S2. Not including yourself, approximately how many full time employees does your company have in Australia?

1. No other employees apart from me (sole trader)
2. 1 full time employee
3. 2 full time employees
4. 3 full time employees
5. 4 full time employees
6. 5-9 full time employees
7. 10-19 full time employees
8. 20-50 full time employees
9. 51-100 full time employees
10. More than 100 employees

Q: Thinking about the current performance of your own business, do you think your business is performing?

1. Very Well
2. Quite well
3. Not very well
4. Not at all well
9. Don't know/Unsure

Q: Thinking about the next twelve months, how confident do you feel about the prospects for your own business?

1. Extremely confident
2. Fairly confident
3. Neutral
4. Fairly worried
5. Extremely worried

Q: Now thinking about the performance outlook for your own business over the next 12 months, do you think your business will perform...

1. Better than now
2. Worse than now
3. No change
9. Don't know/Unsure

Q: You mentioned that you expect your business (\*\*\*) over the next 12 months, what are the factors underpinning your expectation?

Please select all that apply

Current tax levels

Future proposed tax changes - going up

Future proposed tax changes - going down

Petrol prices too high

Petrol prices forecast reduction

Employment market favourable for employers

Lack of available trained workers to draw on

Increase in Government investment in my industry

Decrease in Government investment in my industry

Increase in competitive activity

Decrease in competitive activity

- Organic growth of my industry is increasing
- Decline in growth rate of my industry
- Consumer/end user trends changing favourably
- Consumer/end user trends changing unfavourably
- None of these
- Other (please specify)

Q: Thinking more generally about the condition of the overall Australian economy over the next 12 months time, do you think it will perform....

1. Better than now
2. Worse than now
3. No change
9. Don't know/Unsure

Q: How would you rate the Federal Government's current performance in contributing to the development of small business in Australia?

1. Very poor performance
2. Somewhat poor performance
3. Neither good nor poor performance
4. Somewhat good performance
5. Very good performance
9. Don't know/Unsure

Q: How would you rate your State Government's current performance in contributing to the development of small business in your region?

1. Very poor performance
2. Somewhat poor performance
3. Neither good nor poor performance
4. Somewhat good performance
5. Very good performance
9. Don't know/Unsure

Q: Listed below are a number of issues that your business will deal with over the next 12 months. Thinking only about your own business, please indicate your outlook for each of these issues by using the following scale where

1. *Very positive*, 2. *somewhat positive*, 3. *Neutral*, 4. *Somewhat negative*, 5. *Very negative*, 6. *Not applicable*

Sales

Cash flow

Business costs

Profitability

Competitor activity

Federal Government policies

Local Government policies

Exchange rates

Interest rates

Business systems (IT, accounting)

Marketing and customer relationships

Q: Do you expect your business revenue to increase, decrease or remain unchanged in the next 12 months?

1. Increase
2. Decrease
3. Unchanged
9. Don't know/Unsure

If Q (1) ASK;

Qa: How much do you expect your revenue to increase in the next 12 months?

1. 1-5%
2. 6-10%

3. 11-15%
4. 16-20%
5. More than 20%

If Q (2) ASK;

Qb. how much do you expect your revenue to decrease in the next 12 months?

1. 1-5%
2. 6-10%
3. 11-15%
4. 16-20%
5. More than 20%

Q: Within the next 6 months, do you expect to invest money in order to help your business grow?

1. Yes
2. No
9. Don't know/Unsure

If Q (1) ASK;

Qa: And approximately how much money do you expect to invest in the next 6 months specifically to help grow your business?

1. Less than \$5,000
2. 5,000 - \$9,999
3. 10,000 - \$50,000
4. More than \$50,000
9. Don't Know / Unsure
98. Will invest nothing to grow the business

Q: How do you usually find your employees? Please select all that apply

1. By advertising in newspapers
2. By advertising on the Internet
3. Through family/friends/other employees in my company
4. Via professional association
5. Through recruitment agency
6. Other (specify)

If S2 (1) skip next Q

Q: What percentage of your employees are \*\*\* Percentages must add up to 100%.

- Full-time permanent  
Part-time permanent  
Contract  
Casual  
Other (specify)

Q: Does your business have a domain name registered?

1. Yes
2. No
9. Don't know/Unsure

Q: Does your business have a website?

1. Yes
2. No
9. Don't know/Unsure

D. What is the main product, service or activity that your business provides? \_\_\_\_\_  
(open-ended)

D. What industry does your business operate in?

1. Agriculture
2. Manufacturing
3. Electricity, gas and water supply
4. Construction
5. Wholesale trade
6. Retail trade
7. Accommodation, cafe and restaurants
8. Transport and storage
9. Communication, media and marketing services
10. Finance and insurance
11. Property and business services
12. Government administration and defence
13. Education
14. Health and community services
15. Cultural and recreational services
16. Personal and other services
17. IT/Information & Communications Technology
18. Tourism
19. Other (specify)

D. Which state is your company predominantly based in?

1. NSW
2. VIC
3. QLD
4. SA
5. WA
6. TAS
7. NT
8. ACT

D. What is the postcode where your business is located? If you have more than one office please indicate the postcode where your business headquarters are based. \_\_\_\_\_  
(open-ended)

D. Does your business operate out of a household/home office?

1. Yes
2. No

D. Does your business conduct most of its day-to-day work at these premises, or away from these premises?

1. At premises
2. Away from premises

D. How long has your business been operating?

1. Less than 1 year
2. 1 to less than 2 years
3. 2 to less than 3 years
4. 3 to less than 5 years
5. >5 to less than 10 years
6. 10 years or more

D. Which of the following broad categories describes your company's annual turnover?

1. Under \$50, 000
2. 50, 000 to less than \$100,000
3. 100,000 to less than \$500,000
4. 500,000 to less than \$1 million
5. \$1 million to less than \$5 million
6. 5 million to less than \$10 million
7. 10 million or more
9. Don't know/Unsure

D. Does your business sell products or services primarily to other businesses or consumers/customers?

1. Businesses
2. Consumers/ customers
3. Both
4. Other (specify)
9. Don't know/Unsure

D. What percentage of your overall business expenses does each of the following areas account for (your best estimate is fine)?

Percentages must add up to 100%.

Rent and property costs

Salary/wages

Software and hardware

Plant equipment, furniture, materials and inventory costs

Marketing, advertising and sales

Energy use - electricity, gas, water, oil/petrol

Research & Development costs

Administrative costs - human resource management, accounting, finance

Other (specify)

D. Approximately how much do you spend on your accountant per annum?

1. Less than \$500 per annum
2. Between \$500 and \$999 per annum
3. Between \$1000 and \$1999 per annum
4. Between \$2,000 and \$2,999 per annum
5. Between \$3,000 and \$3,999 per annum
6. Between \$4,000 and \$4,999 per annum
7. Between \$5,000 and \$5,999 per annum
8. Between \$6,000 and \$6,999 per annum
9. Between \$7,000 and \$7,999 per annum
10. Between \$8,000 and \$9,999 per annum
11. More than \$10,000 per annum

D. What is your gender?

1. Male
2. Female

D. Which of the following categories best describes your age?

1. Under 18 years
2. 18-24 years
3. 24-29 years
4. 30-39 years
5. 40-49 years
6. 50-59 years
7. 60-65 years
8. Over 65 years
9. I don't wish to answer this question

D. Which of the following best describes your current marital status?

1. Not married
2. Divorced/Separated
3. Married
4. Living with partner (de facto spouse relationship)
5. Other (specify)
6. I do not wish to answer this question

D. What is your partner's/ spouse's occupation? \_\_\_\_\_ (open-ended)  
Please enter your response into the box below.

D. Which of these best describes your household...



1. Single living at home with parents
2. Single, sharing accommodation with other adults
3. Single, living alone
4. Single with children living at home
5. Single with children who do not live at home
6. Married/de facto with children who live at home
7. Married/de facto with children who have left home
8. Married/de facto with no children
9. Other

D. Which of the following ranges best describes your total household annual income before tax?

1. Under \$25,000
2. \$25,000 - \$39,999
3. \$40,000 - \$59,999
4. \$60,000 - \$74,999
5. \$75,000 - \$99,999
6. \$100,000 - \$149,999
7. \$150,000 - \$199,999
8. \$200,000+
9. Don't know/Unsure
98. I do not wish to answer this question