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# MYOB Australian Small Business Survey

## March 2009

### 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 **1,503** small business proprietors and general managers, conducted in **February 2009**. 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

### **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	151
Manufacturing	107
Construction	281
Wholesale Trade	69
Retail Trade	198
Accommodation, Café and Restaurants	35
Transport and Storage	86
Communication, Media and Marketing Services	23
Finance and Insurance	30
Property and Business Services	222
Education	29
Health and Community Services	94
Cultural and Recreational Services	48
Personal and Other Services	86
Information & Communications Technology	44
<b>Total</b>	<b>1503</b>

The findings are also reported by state for some questions:

<b>State</b>	<b>Sample</b>
NSW	446
VIC	351
QLD	350
SA	111
WA	170
TAS	37
NT*	16
ACT*	22
<b>Total</b>	<b>1503</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 (72%) of small business owners surveyed report their business is currently performing very or quite well**

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

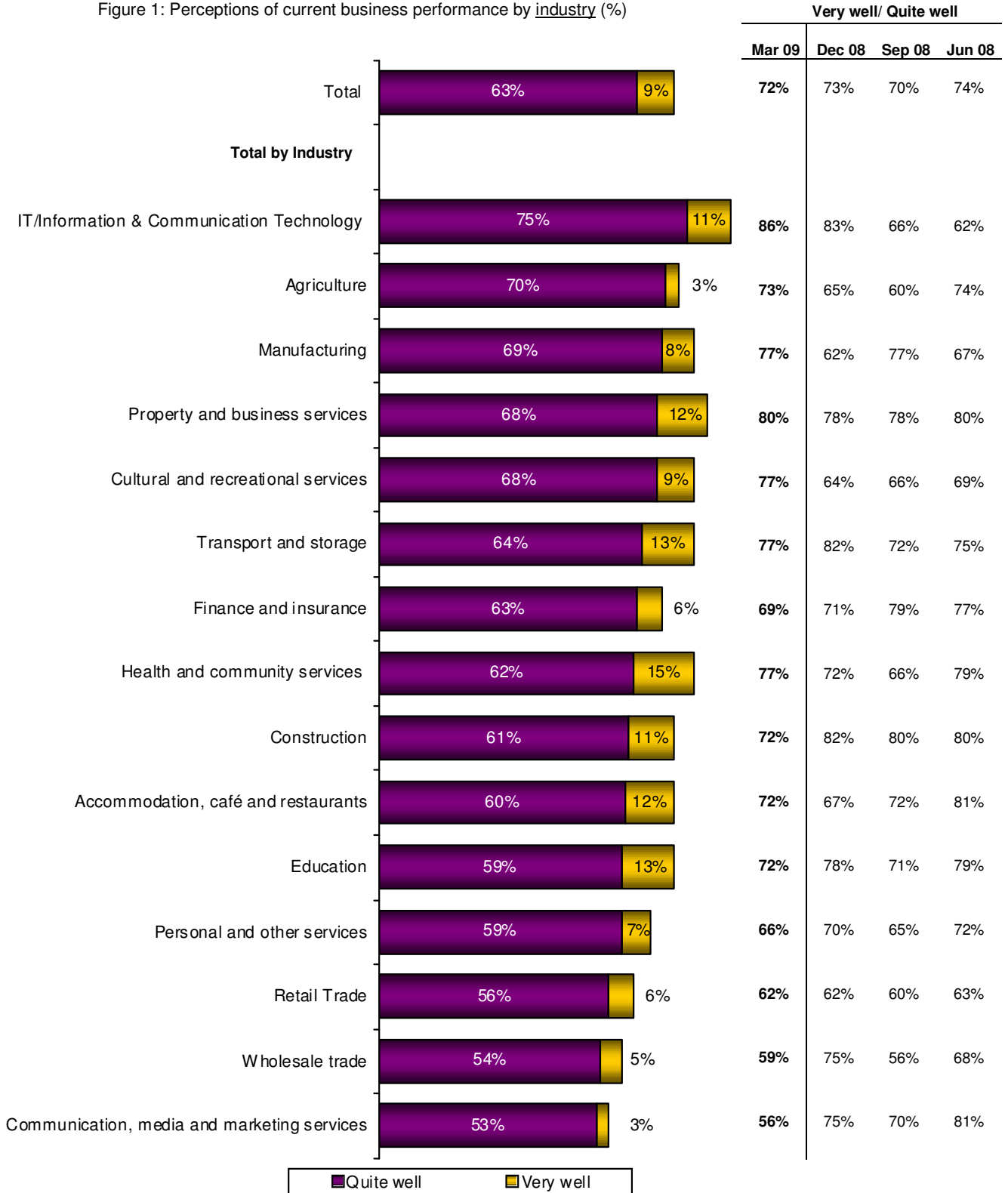
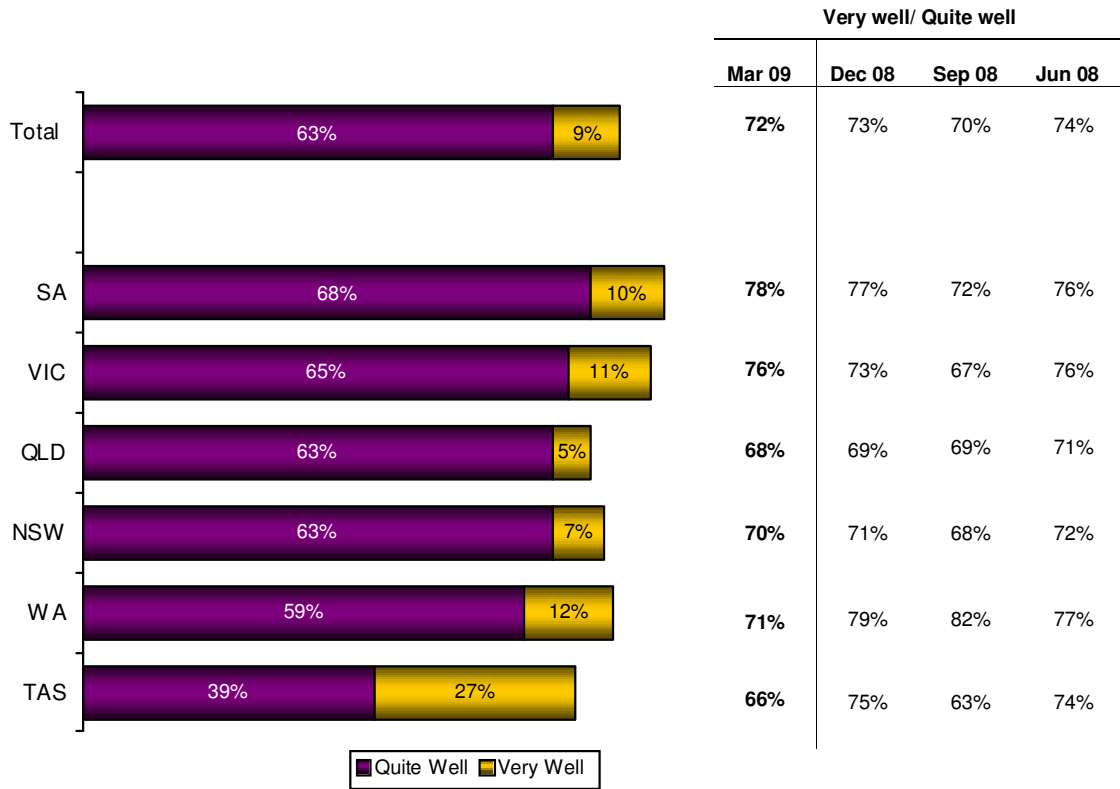


Figure 1.1: Perceptions of current business performance by state (%)



Base: Small businesses owners (n=1503)

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?

AMR Interactive, March 2009

The majority (72%) of small business owners surveyed report their business to be 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 86% reporting a very or quite well performance. This is an increase from 62% in June 2008. Following this sector are the Agriculture (73%) and Manufacturing (77%) sectors.

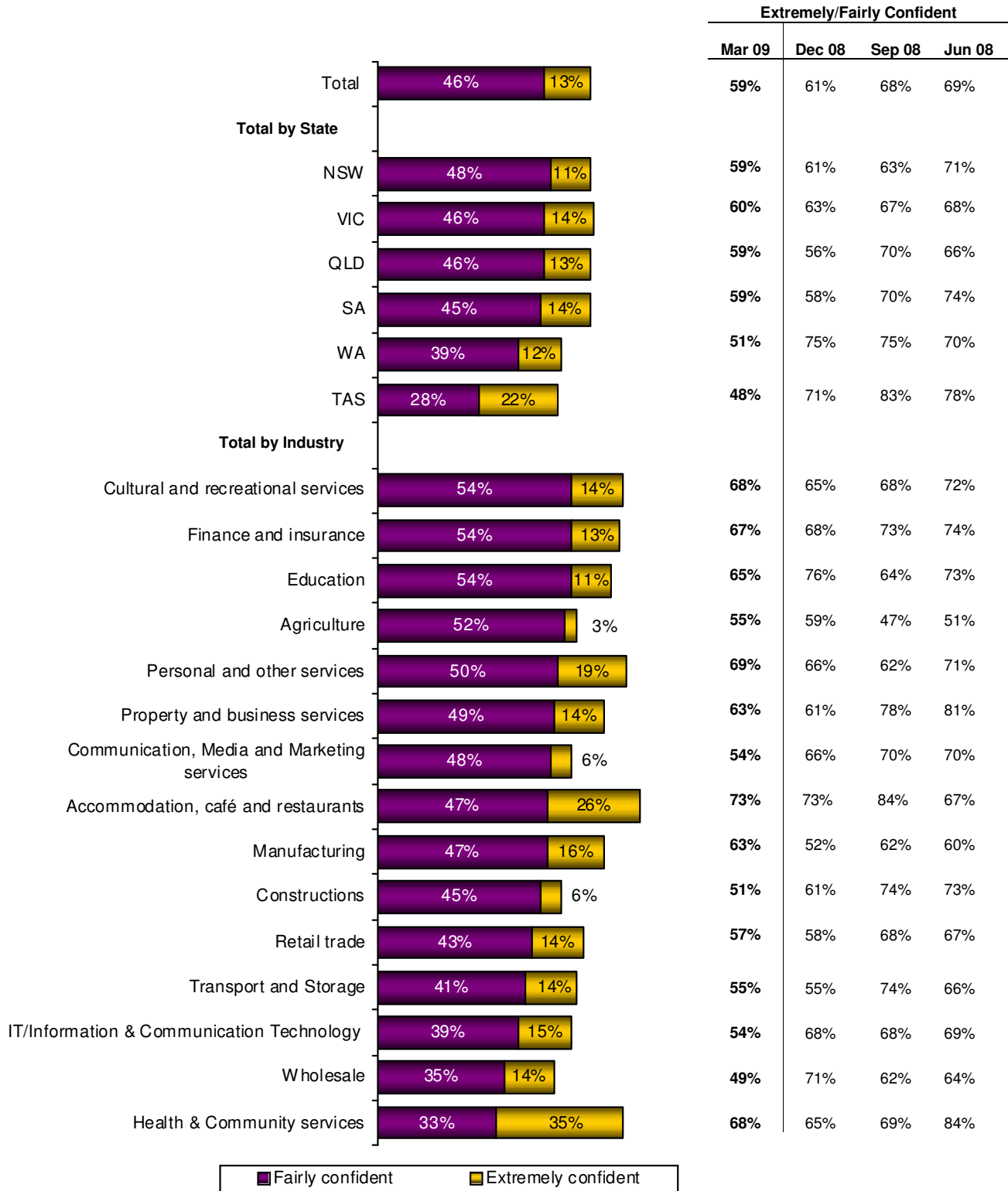
There is a significant drop in very well/quite well current performance of small businesses in the Communication, media and marketing services industry with 56% of small business owners in this industry reporting very well/quite well, which is down from 81% in June 2008.



## Confidence in future business prospects

### Over half (59%) of small business owners surveyed are confident about their future business prospects

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



Base: Small business owners (n=1503)

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, March 2009

Over half (59%) of the small business owners surveyed are confident in their business prospects for the next twelve months. There has been a consistent decline in confidence for business prospects over the past 4 quarters ranging from 69% in June 2008, 68% in September 2008 and 61% in December 2008.

Small business owners surveyed in most states have an average of fairly or extremely confident with the exception being small business owners in Western Australia, which were below average, with 51%. And there was a significant drop between December 2008 and March 2009 with Western Australia dropping from 75% in December 2008 to 51% in March 2009.

In regards to industry, small business owners surveyed in Manufacturing (63%) have the most improved confidence in their future prospects, with an increase of 11% from 52% in December 2008. Small business owners in the Wholesale sector show a 22% decline in confidence since December 2008, slipping from 71% to 49% in March 2009.

**Perceptions of own business (future)**

**Just under half (43%) 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 (%)

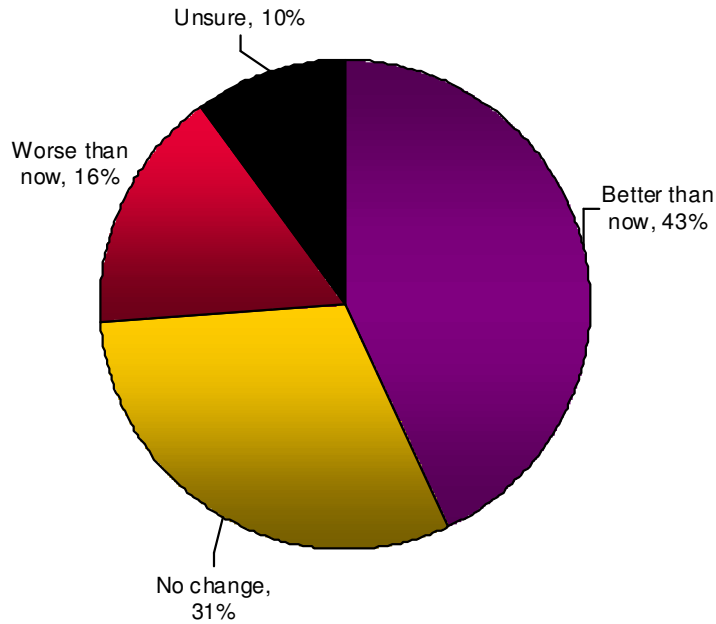


Figure 3.1: Performance outlook (better than now) for own business over the next 12 months by state (%)

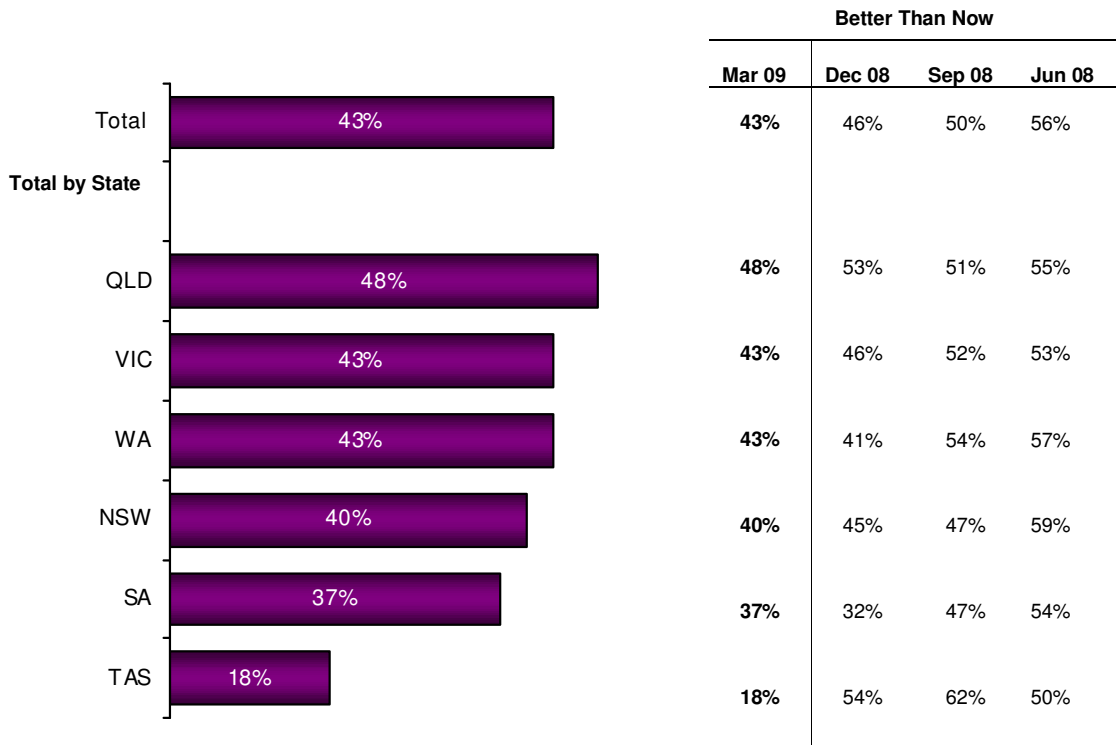
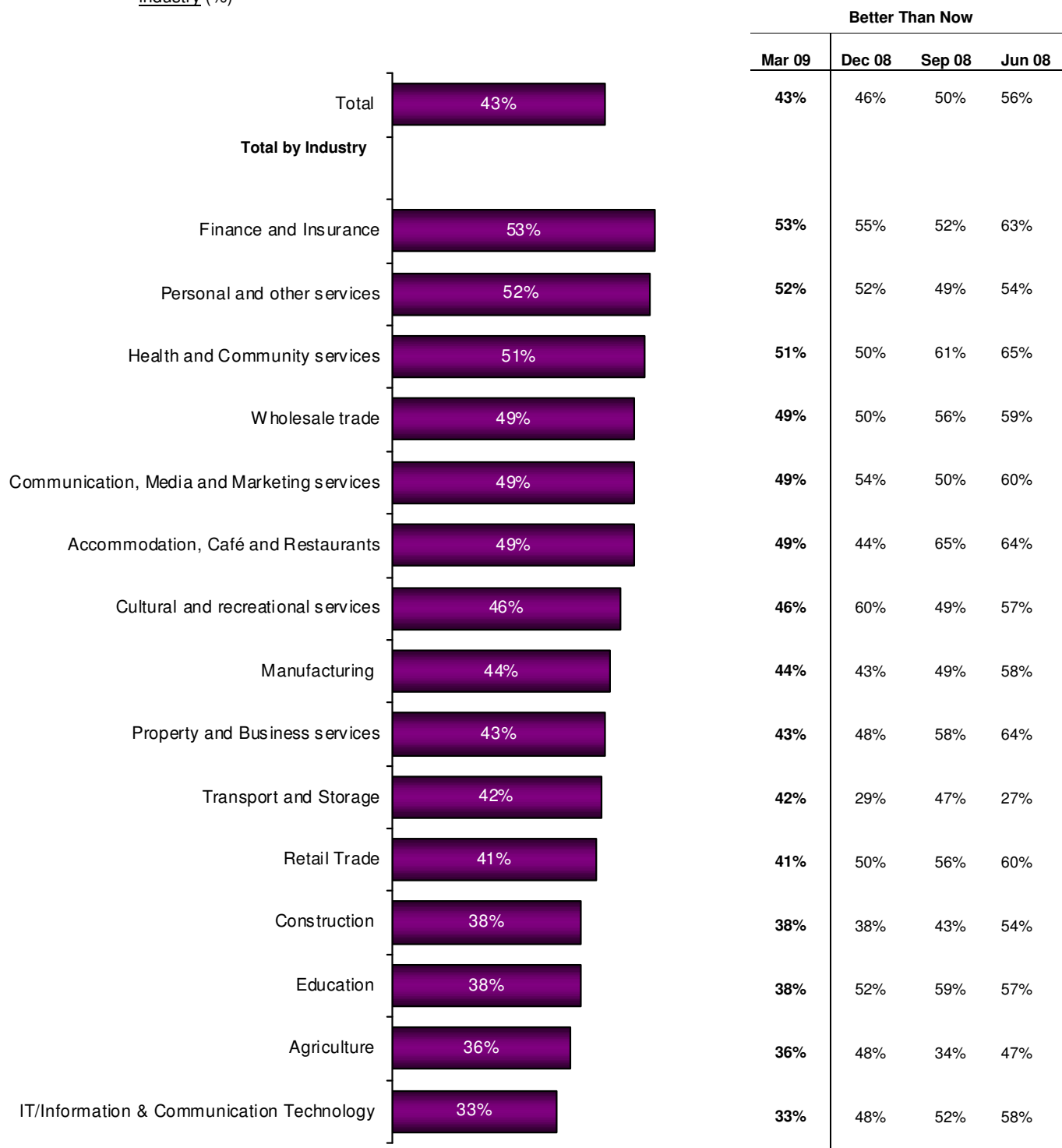


Figure 3.2: Performance outlook (better than now) for own business over the next 12 months by industry (%)



Base: Small business owners (n=1503)

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, no change, don't know?

AMR Interactive, March 2009

Just under half (43%) of small business owners surveyed believe their business will perform better than now over the next 12 months.

Consistent with the previous quarter, Queensland (48%) has the highest level of small business owners reporting a potentially better than now performance.

Small business owners in the IT/Information and Communication Technology industry have the least confident performance outlook, with only 33% reporting a better than now performance outlook. The most confident sector is Finance and Insurance with 53% of small business owners surveyed from this sector reporting a better than now performance outlook. The Cultural and recreational services sector, which was the most confident in December 2008, dropped significantly from 60% in December 2008 to 46% in March 2009.

## Factors underpinning expectations for business performance

### Consumer/end user trends changing favourably is the most common reason for expecting a better than now business performance

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

Factor	Expectation for Future Business Performance		
	Better than now (n=620)	Worse than now (n=248)	No Change (n=498)
Current tax levels	6%	26%	18%
Future proposed tax changes - going up	3%	14%	4%
Future proposed tax changes - going down	11%	1%	4%
Petrol prices too high	5%	<b>36%</b>	<b>24%</b>
Petrol prices forecast reduction	10%	1%	4%
Employment market favourable for employers	9%	3%	6%
Lack of available trained workers to draw on	6%	10%	9%
Increase in Government investment in my industry	12%	1%	6%
Decrease in Government investment in my industry	0%	14%	5%
Increase in competitive activity	12%	34%	20%
Decrease in competitive activity	18%	4%	6%
Organic growth of my industry is increasing	<b>31%</b>	1%	9%
Decline in growth rate of my industry	3%	<b>54%</b>	<b>23%</b>
Consumer/end user trends changing favourably	<b>47%</b>	3%	14%
Consumer/end user trends changing unfavourably	2%	<b>57%</b>	<b>22%</b>
Drought/Weather	0%	1%	1%
Marketing/increase/Better marketing	2%	0%	0%
Economy/global economy/financial international market	0%	5%	2%
Other	10%	6%	6%

Base: Those who responded 'better than now', 'worse than now' or 'no change' to Q3 (n=1366)

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, March 2009

Of the small business owners surveyed who believe their business will perform better than now over the next 12 months (41% of sample), 47% of this group attributed this to consumer/end user trends changing favourably. This is followed by 31% who attribute this to having organic growth of their industry increase.

Of the small business owners surveyed who expect a worse than now performance (17% of sample), this is largely attributed to consumer/end user trends changing unfavourably (57%), a decline in the growth rate of their industry (54%) and petrol prices too high (36%).

## Expectations for future economic performance

### More than half (61%) of small business owners surveyed expect the Australian economy to perform worse than now over the next 12 months

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

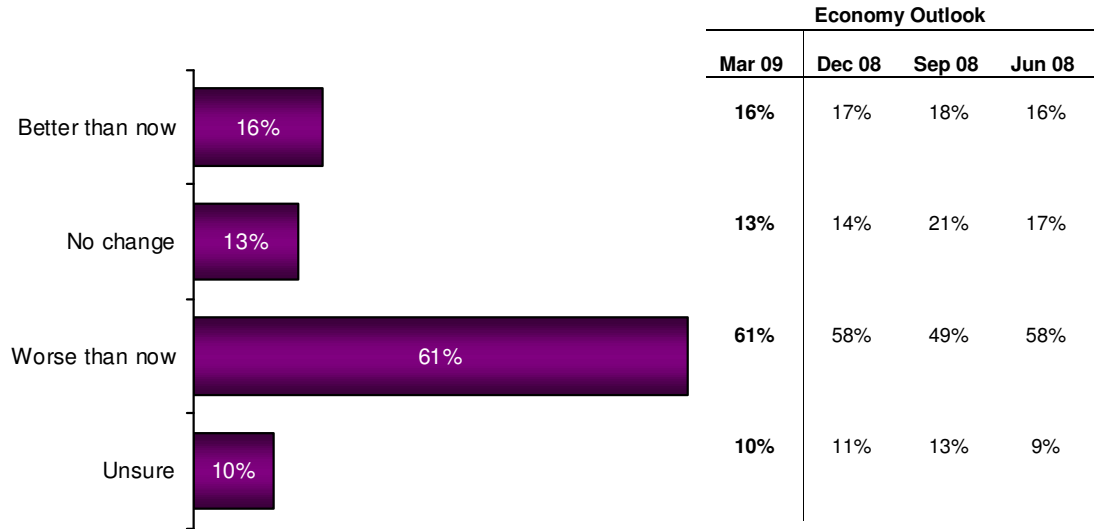


Figure 4.1: Performance outlook for the Australian economy over the next 12 months by state (%)

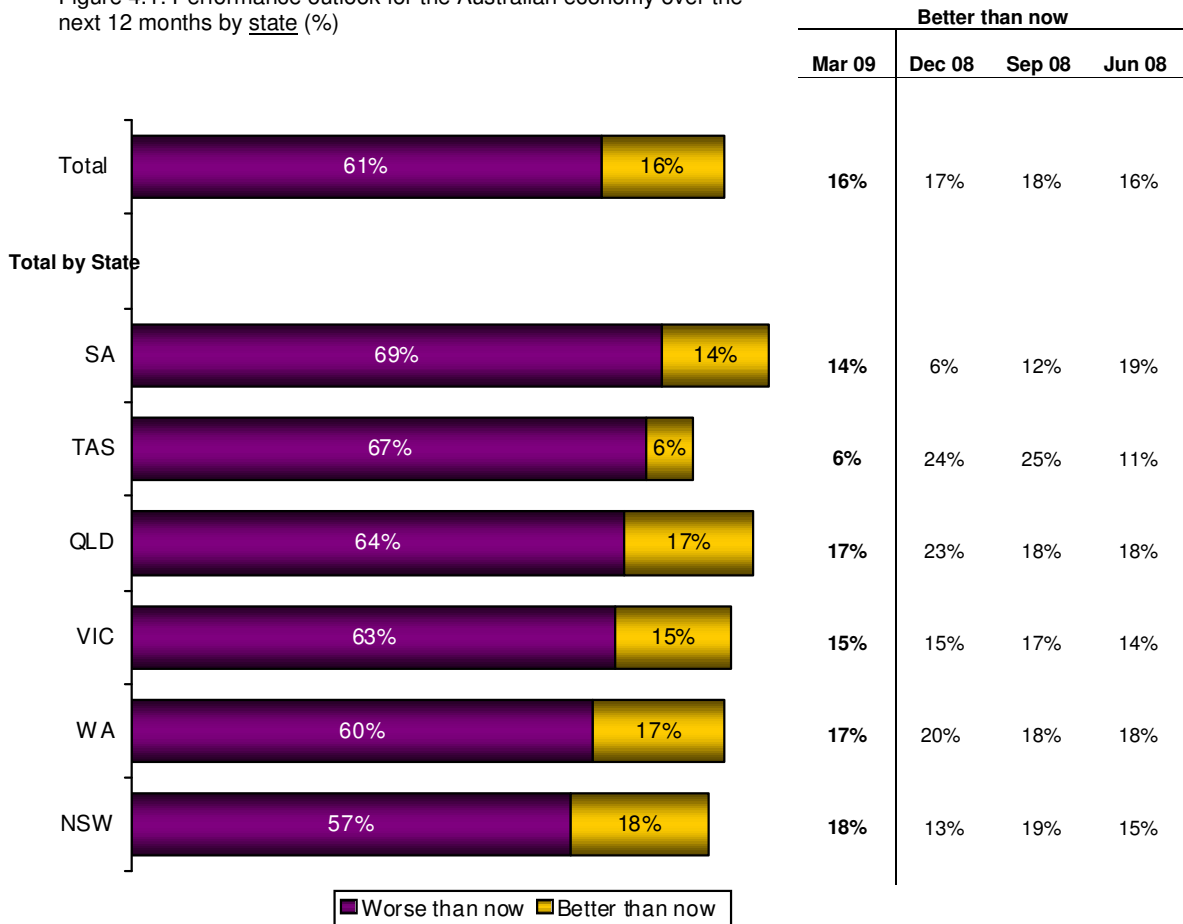
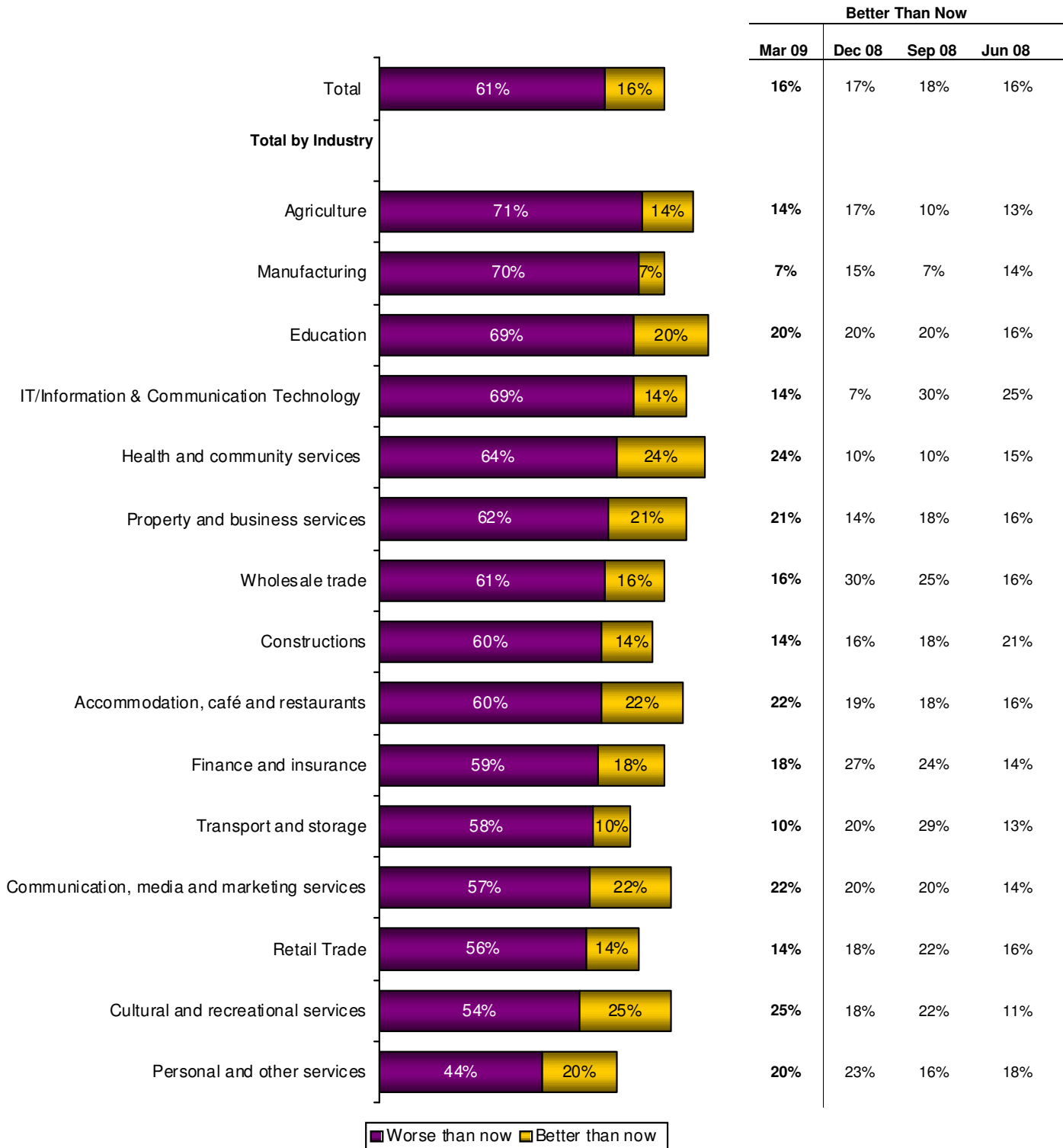


Figure 4.2: Performance outlook for the Australian economy over the next 12 months by industry (%)



Base: Small business owners (n=1503)

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, March 2009



More than half (61%) of small business owners surveyed expect that the Australian economy will perform worse than now over the next 12 months. While only 16% of small business owners surveyed reported expecting a better than now economic performance over the next 12 months, which is consistent with previous quarters.

In regards to a positive outlook for the economy, NSW is the most optimistic state with 18% of small business owners surveyed in NSW expecting the Australian economy to perform better than now over the next 12 months. While SA is the most pessimistic state, with 69% of small business owners surveyed in SA expecting the Australian economy to perform worse than now over the next 12 months.

A total of 14% of small business owners surveyed in the Agriculture sector expect a better than now performance from the Australian economy, as do 7% of small business owners in the Manufacturing sector.

## Perceptions of Federal Government performance

**42% of small business owners surveyed rate the Federal Government's performance in contributing to the development of small business in Australia as poor**

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

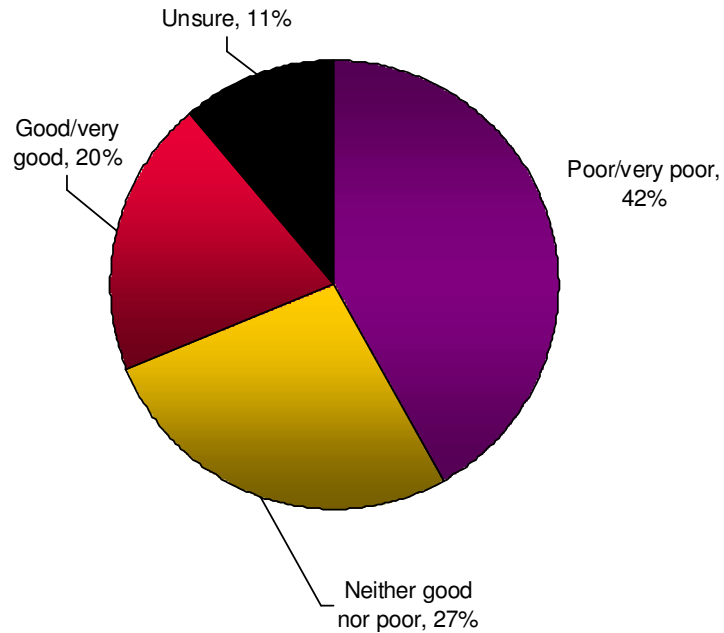


Figure 5.1: Federal Government's contribution to the development of small business in Australia by state (%)

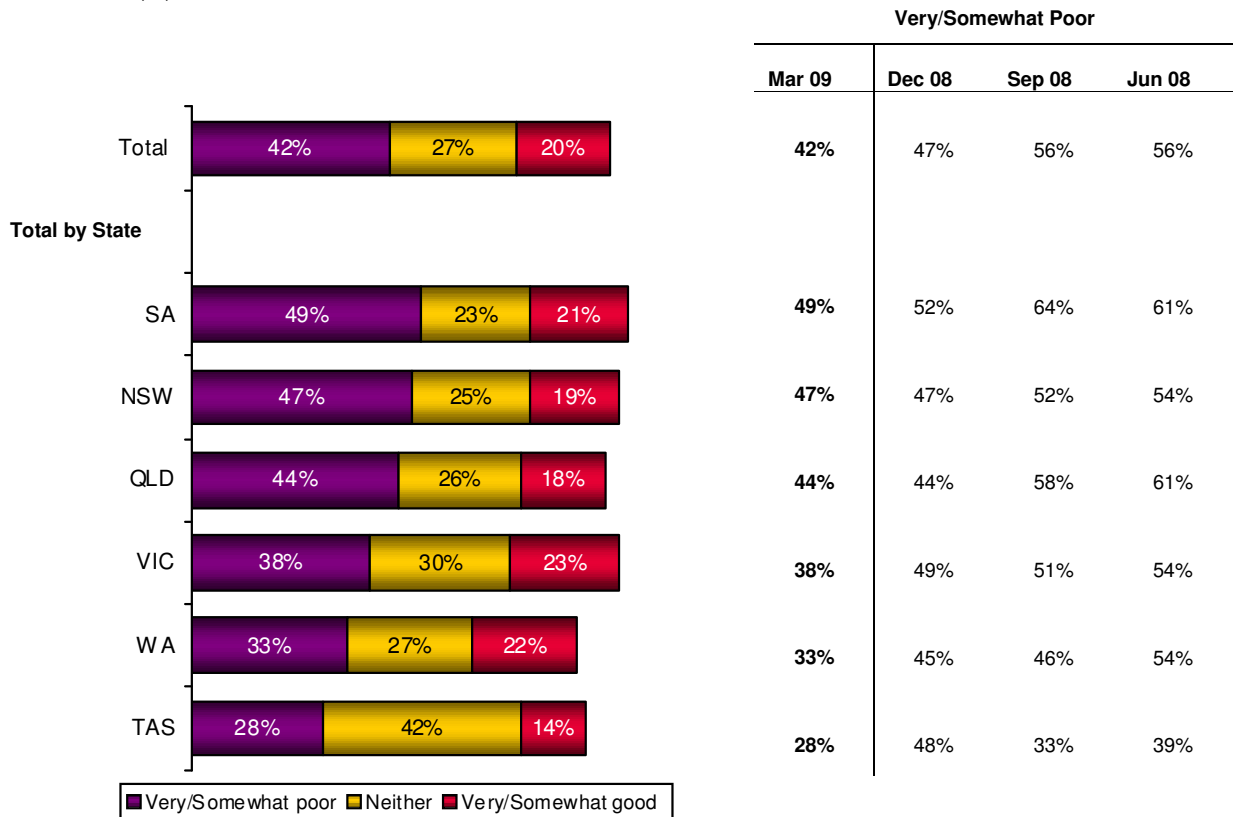
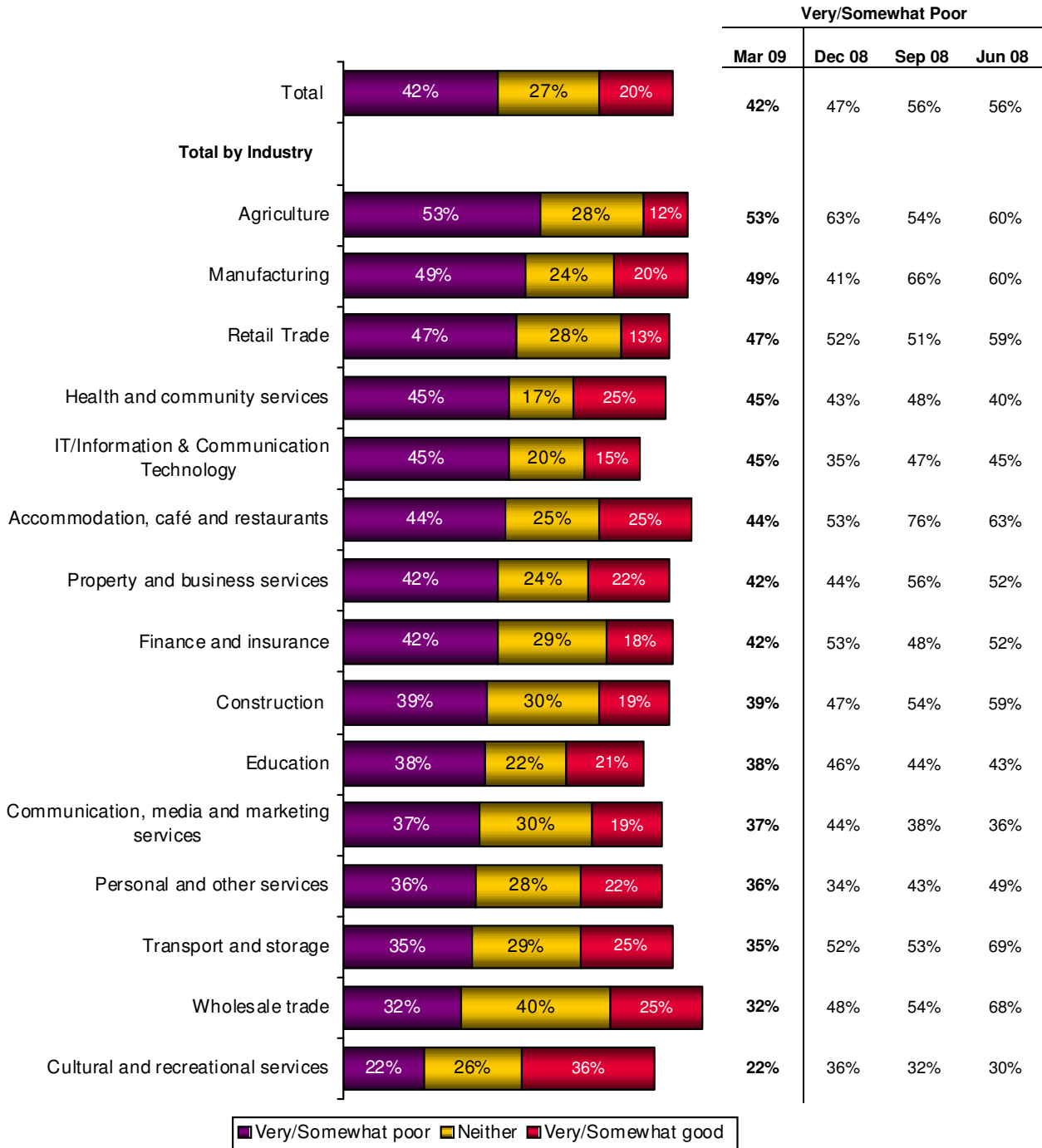


Figure 5.2: Federal Government's contribution to the development of small business in Australia by industry (%)



Base: small business owners (n=1503)

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

AMR Interactive, March 2009

Just under half (42%) 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 5% decline in the negative performance rating since December 2008.

Small business owners in New South Wales and Queensland have remained consistent with 47% and 44% respectively since December 2008.

## Perceptions of State Government performance

**More than half (54%) of small business owners surveyed rate their State Governments performance in contributing to the development of small business in Australia as poor**

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

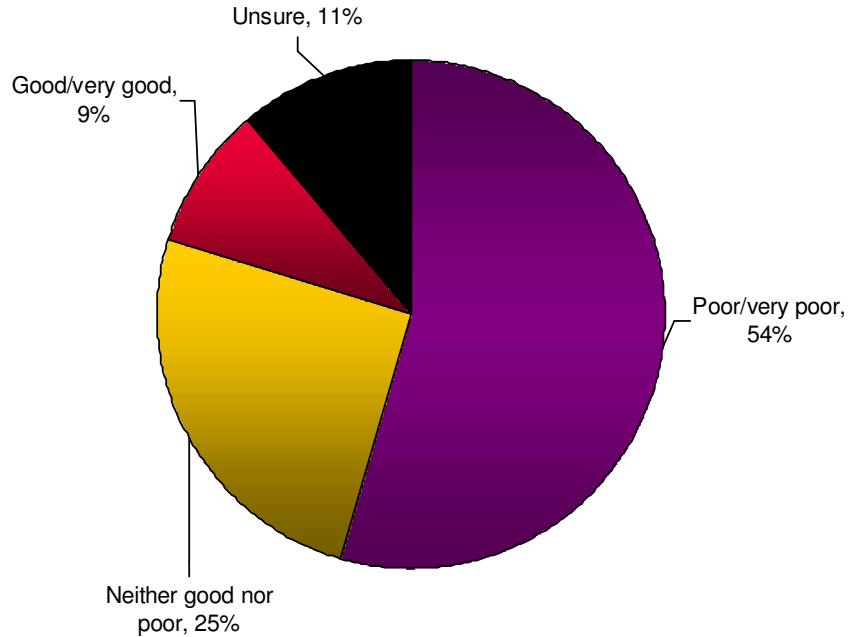


Figure 6.1: State Government's contribution to development of small business by state (%)

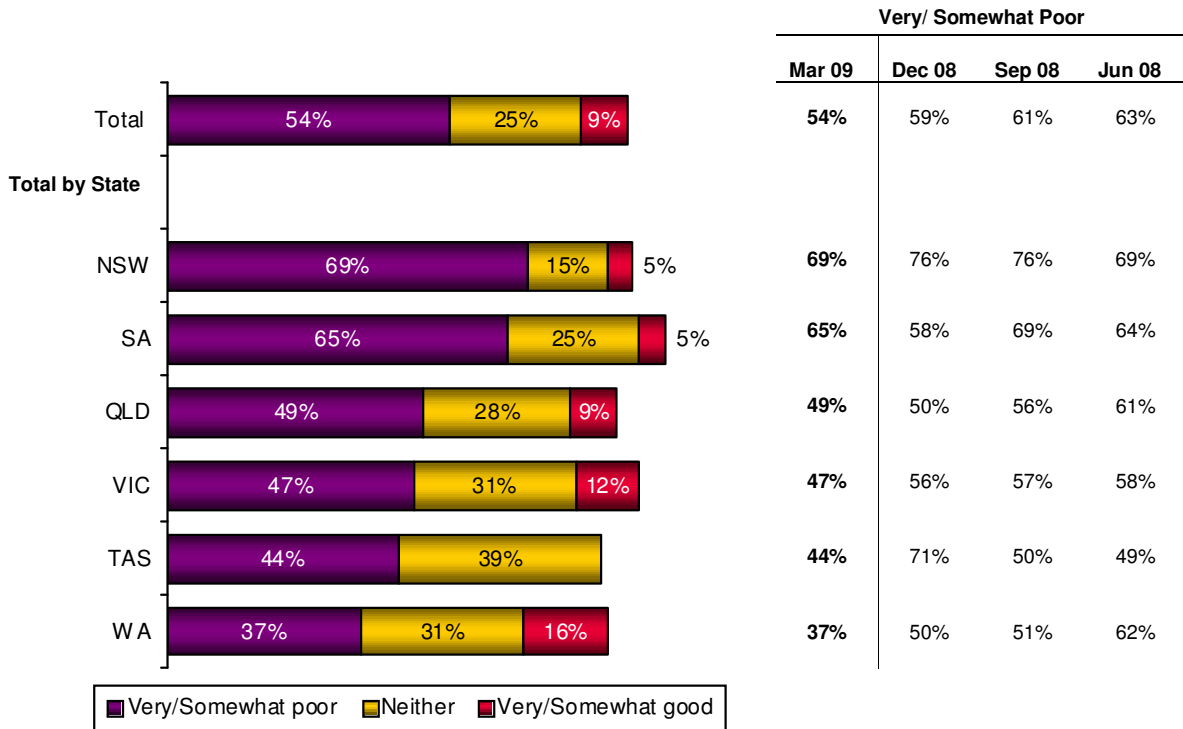
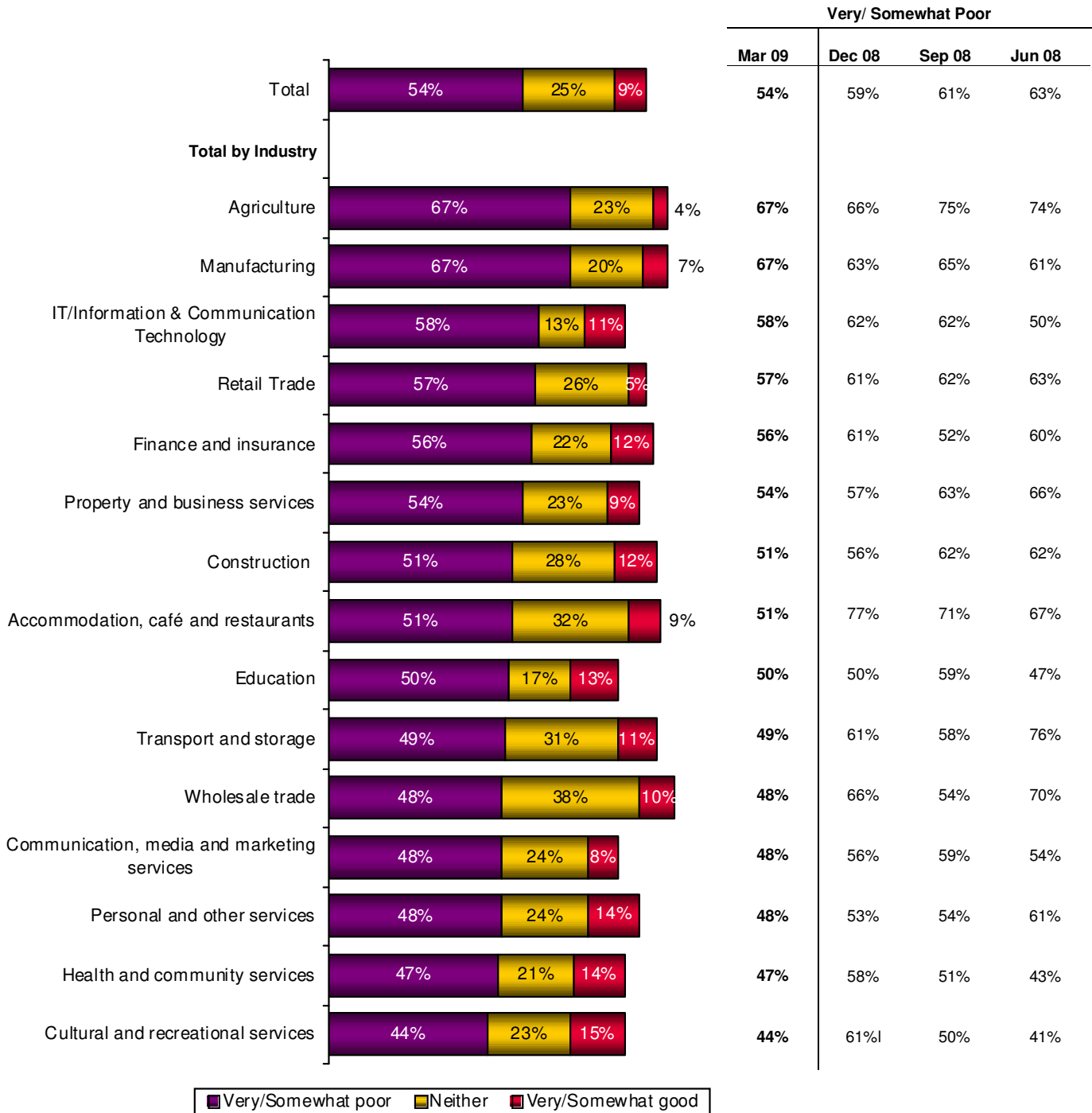


Figure 6.2: State Government's contribution to development of small business by industry (%)



Base: Small business owners (n=1503)

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 (54%) of small business owners surveyed are currently unhappy with their State Governments contribution to small business, with 27% of this group rating their State Governments contribution to the development of small business in Australia as very poor.

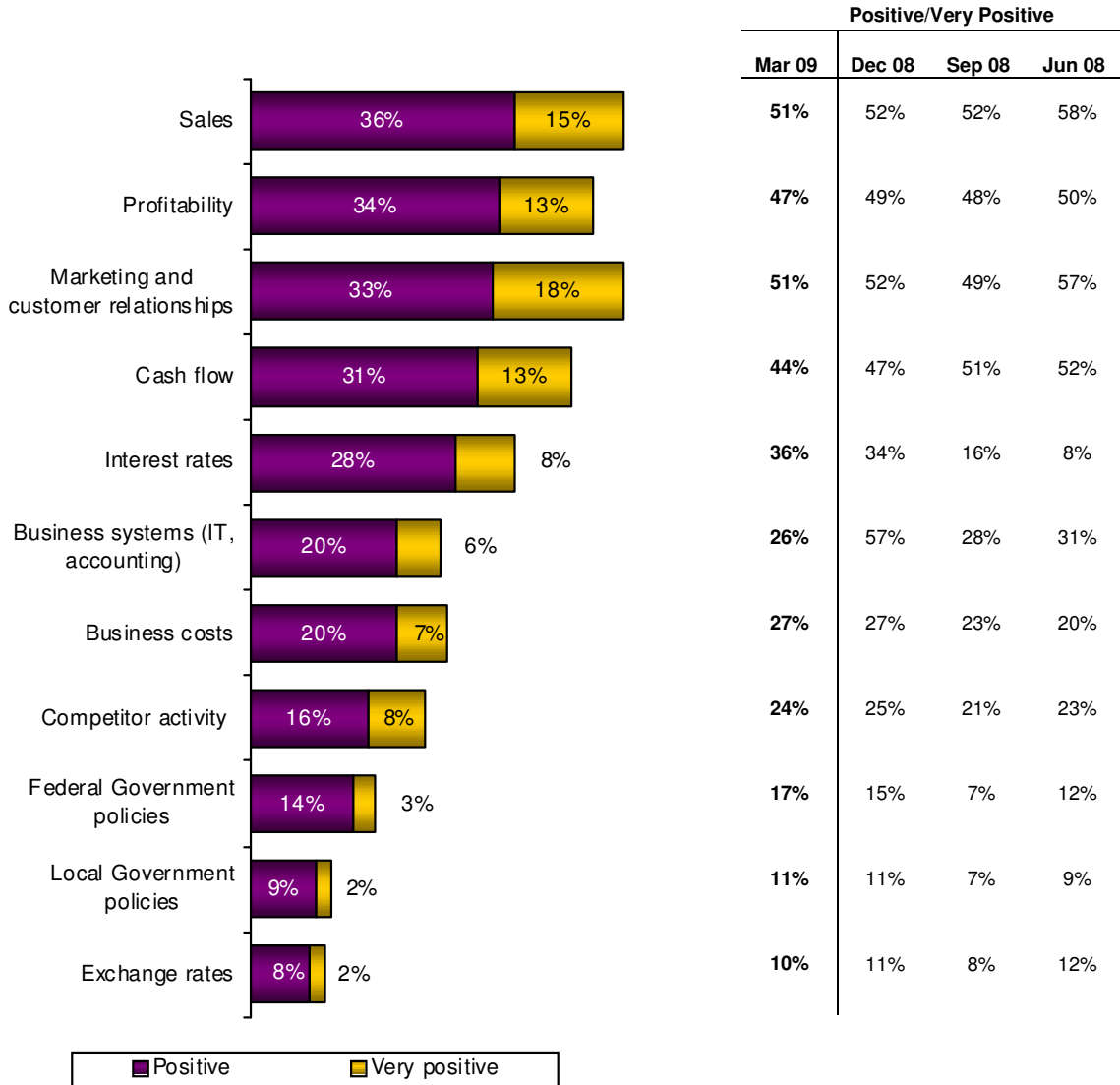
New South Wales is the most dissatisfied state with their State Government with 69% of NSW small business owners surveyed reporting a poor or very poor contribution to the development of small business. There is however a slight drop (7%) when comparing the March 2009 result with the result from December 2008 (76%).

Also small business owners in Western Australia are the happiest with their State Government's contribution with only 37% 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= 1503)

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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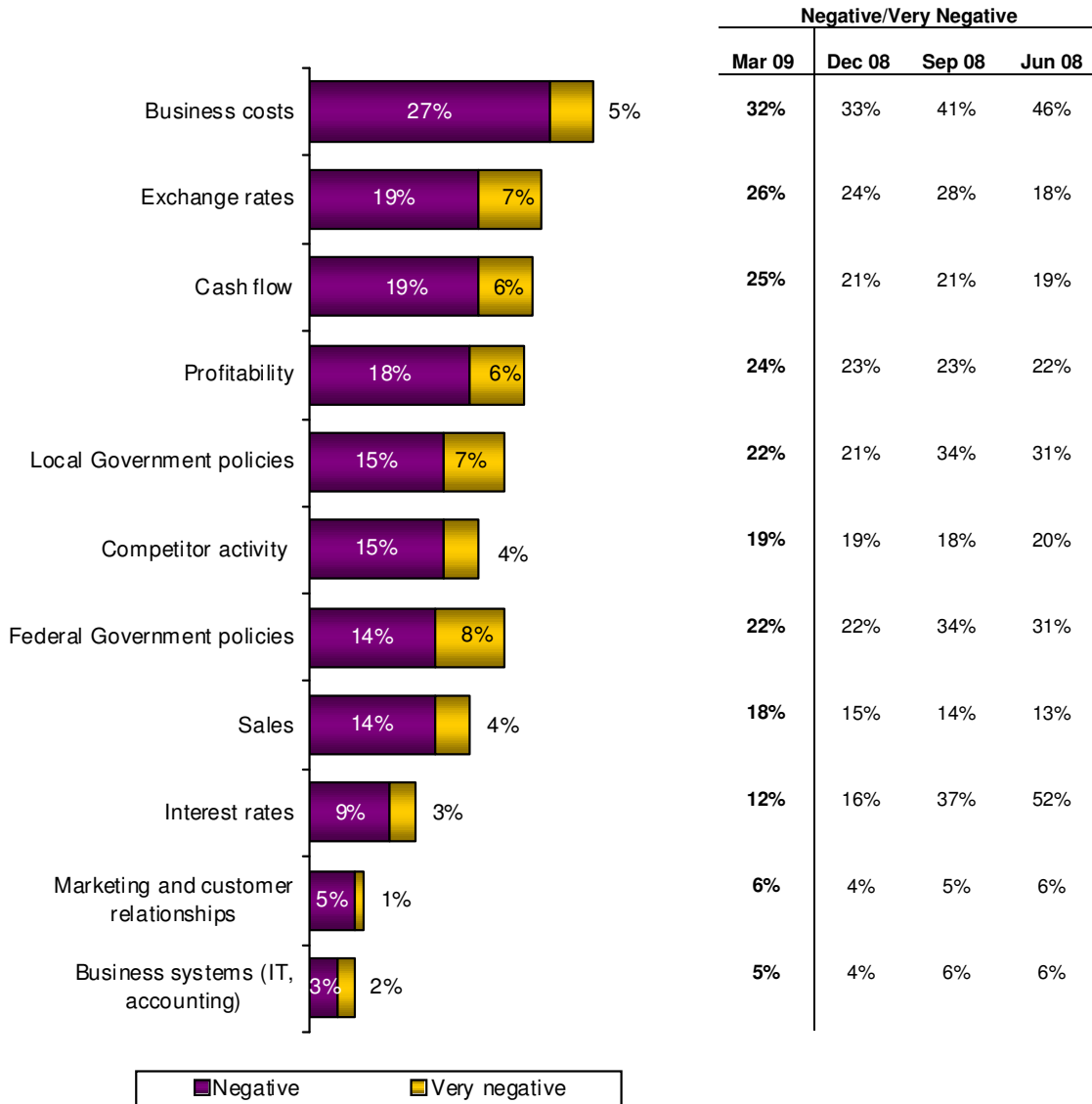
As with previous quarters small business owners have the most positive outlook for Sales, with 51% reporting a positive or very positive outlook for Sales. The outlook for Marketing and customer relationship is also reported as positive or very positive by 51% of small business owners surveyed.



**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=1503)

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, where 32% report a negative or very negative outlook. This is followed by exchange rates with 26% of small business owners surveyed reporting a negative or very negative outlook.

## Outlook for business revenue

**Just under half (45%) 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 (%)

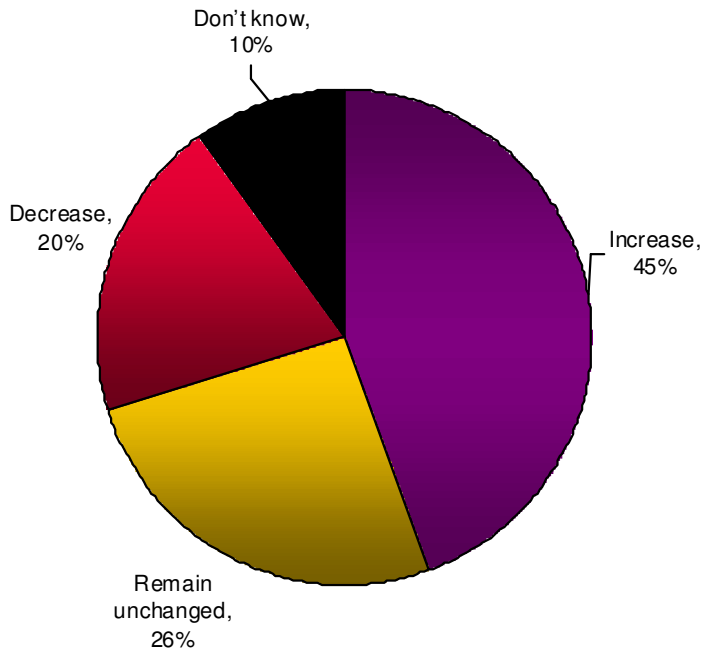


Figure 9.1: Outlook ('increase') for own business revenue in the next 12 months by state (%)

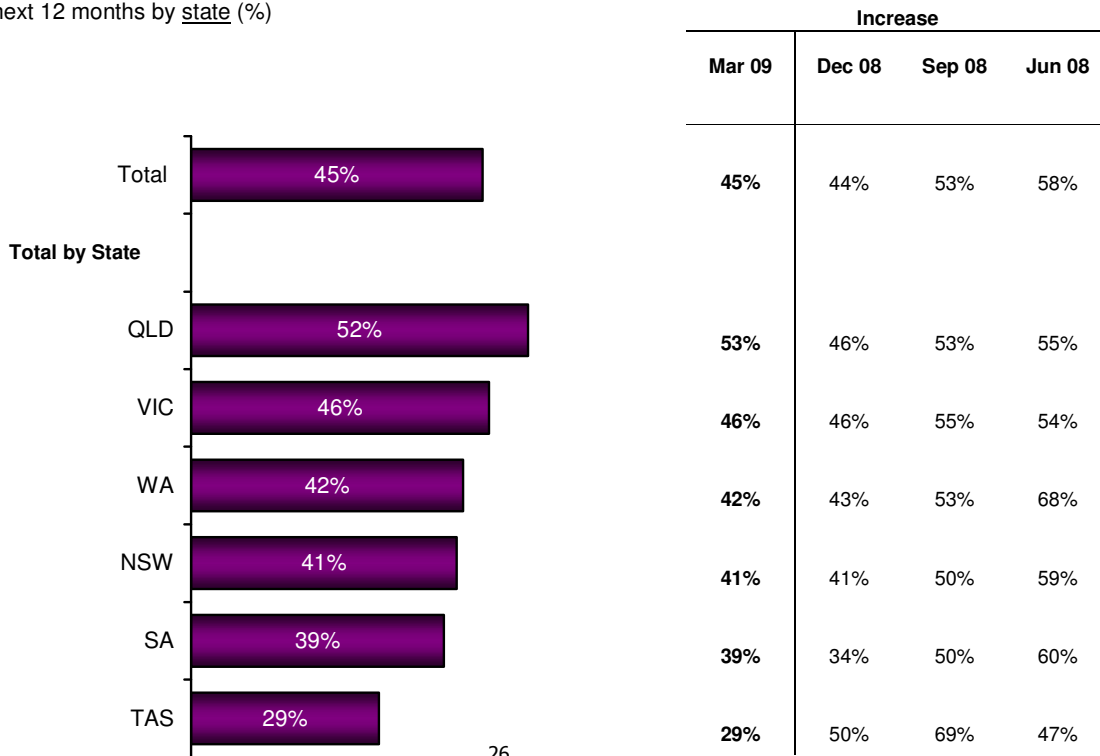
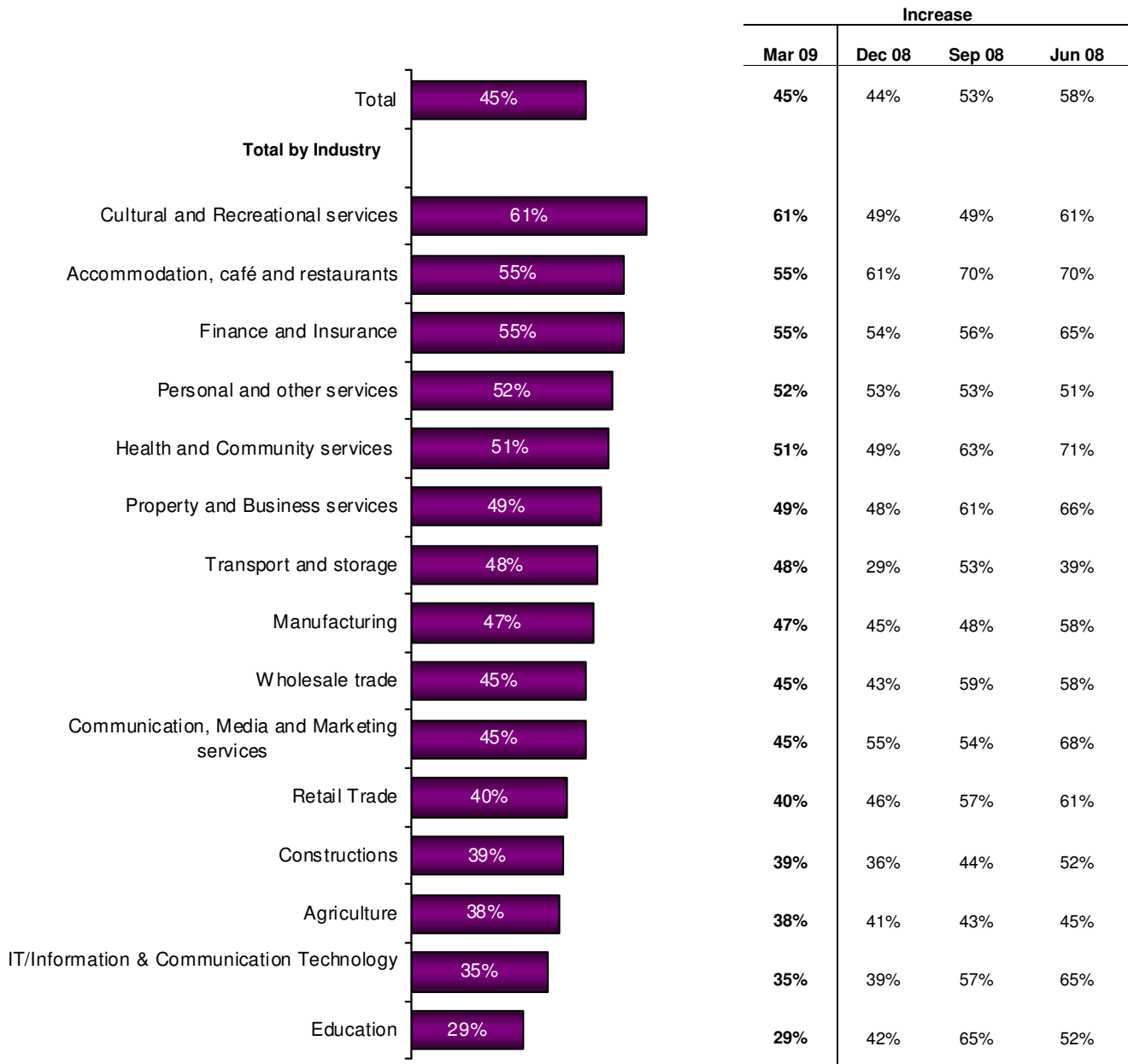


Figure 9.2: Outlook ('increase') for own business revenue in the next 12 months by industry (%)



Base: Small business owners (n=1503)

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

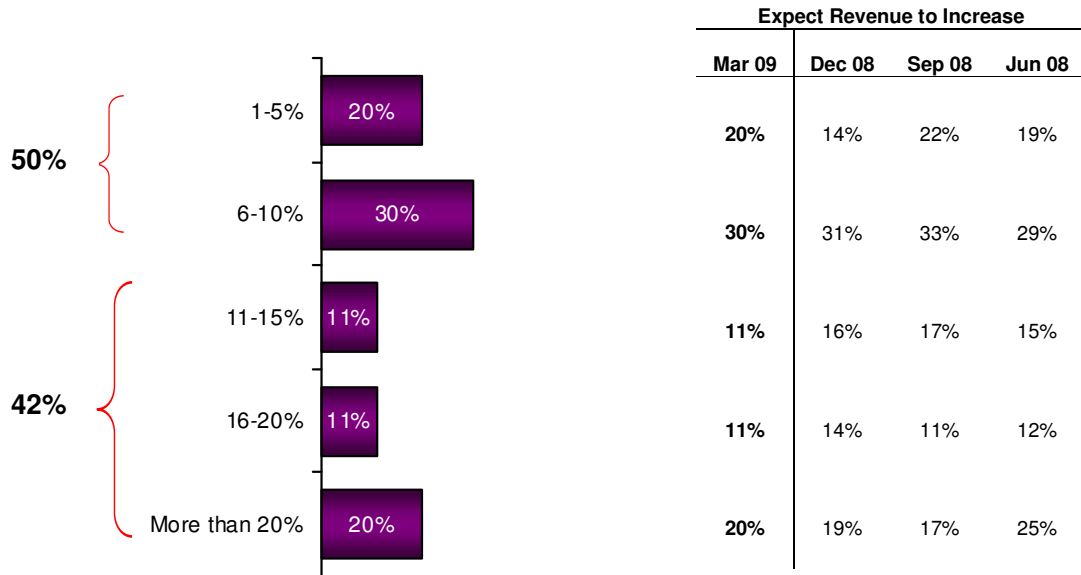
AMR Interactive, March 2009

Consistent with the 43% of small business owners who reported an expected better than now performance of their business over the next 12 months, 45% of small business owners expect an increase in business revenue over the next 12 months.

**Expectations for increases in business revenue**

**Of the small business owners who expect an increase in revenue (45%), the most common increase expected 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=651)

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

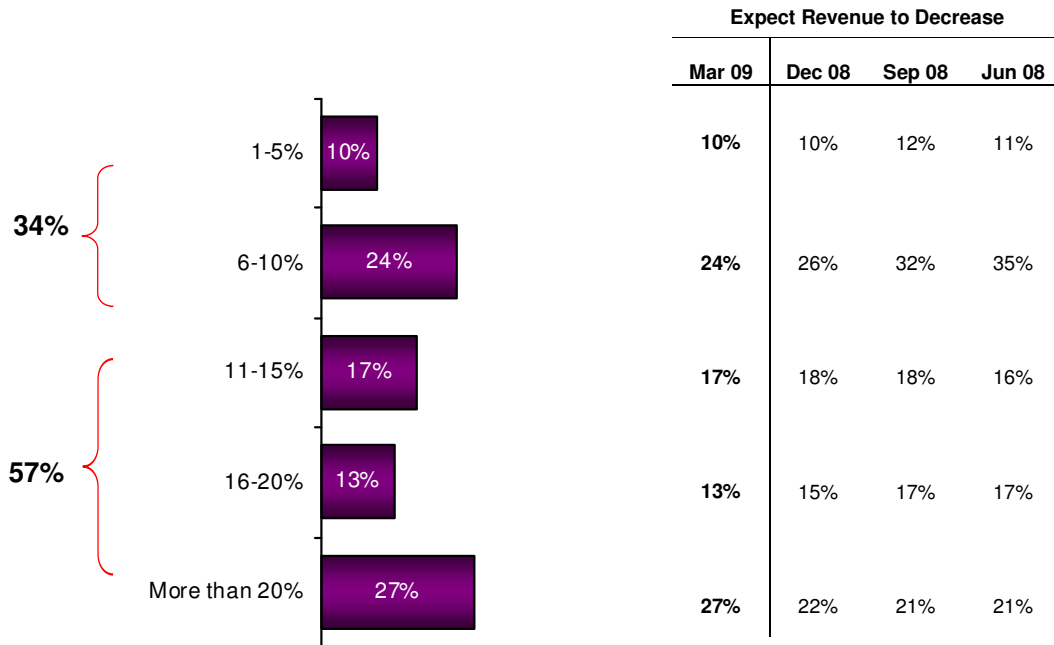
AMR Interactive, March 2009

Of those small business owners who expect an increase in revenue over the next 12 months (45% of sample), 30% expect this increase to be between 6 and 10%.

## Expectations for decreases in business revenue

**Of the small business owners who expect a decrease in revenue (20%), more than half (57%) expect this 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=301)

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 (20% of sample), 57% of this group expect this decrease to be more than 11%, with 27% of this group expecting this decrease to be more than 20%.

## Expectation of investing in own business

**Just under one-third (30%) 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 (%)

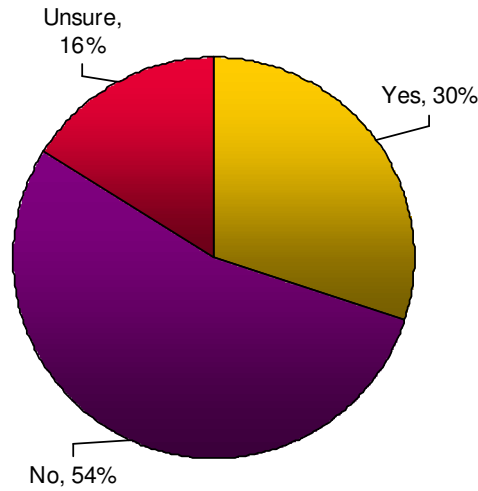
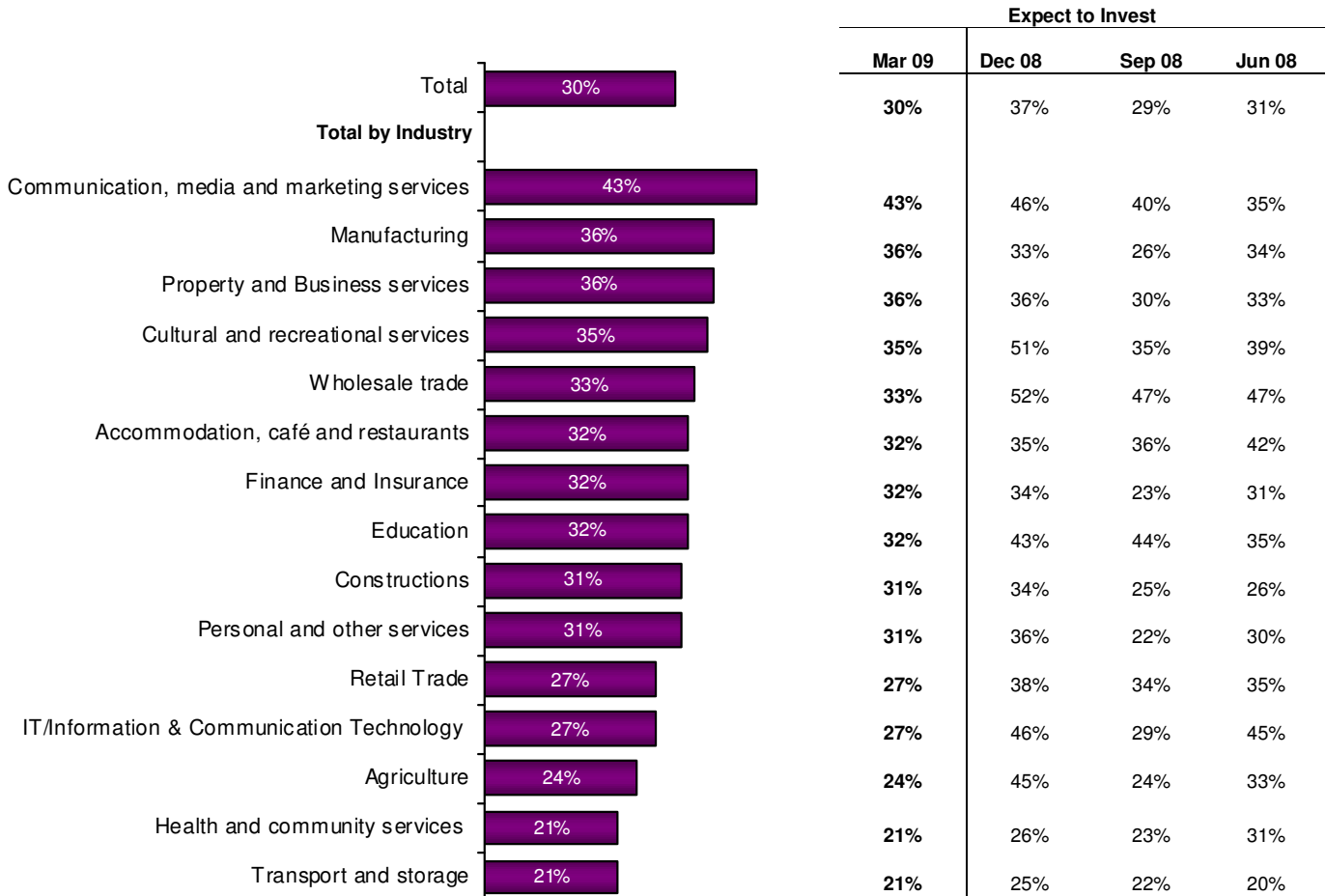


Figure 12.1: Expectation of investing in own business in the next 6 months by industry (%)



Base: Small business owners (**n=1503**)

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

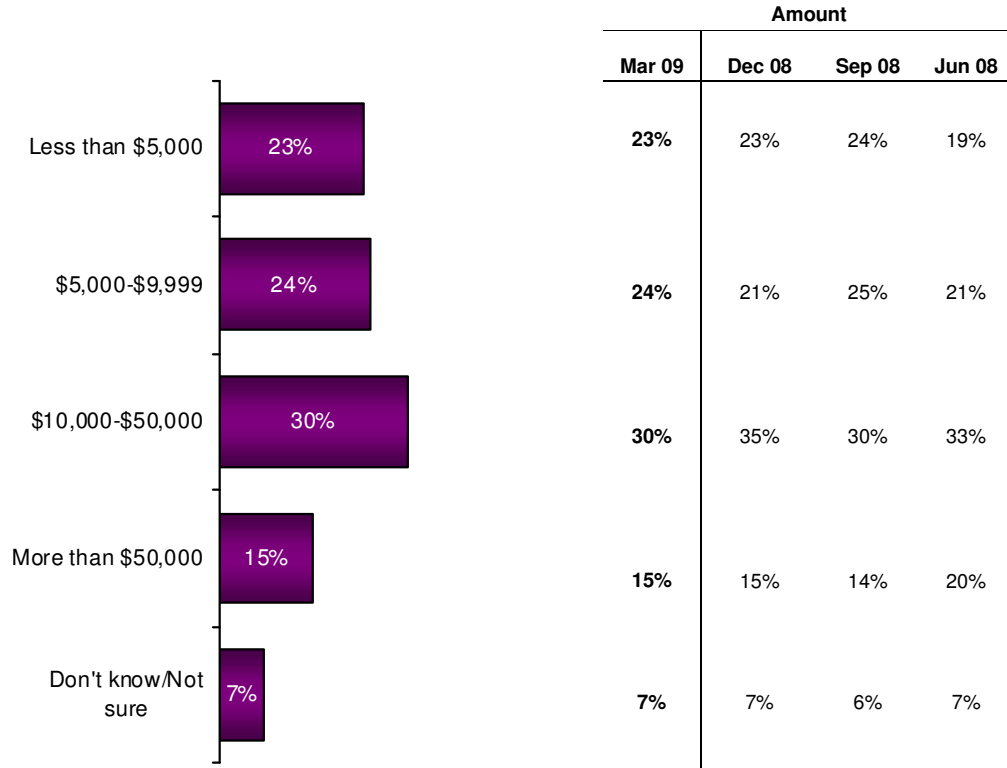
AMR Interactive, March 2009

Over half (54%) of small business owners surveyed do not expect to invest in their own business in the next 6 months, however 30% 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 intend investing money in their business (30%), 30% 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=455)

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 (30%), the most common amount of expected investment is between \$10,000 and \$50,000 with 30% of this group reporting this amount. While 47% of these business owners expect to invest \$9,999 or less.



## Intention of employing or reducing staff

### 36% of small business owners surveyed are not planning to employ or reduce staff in the next 12 months

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

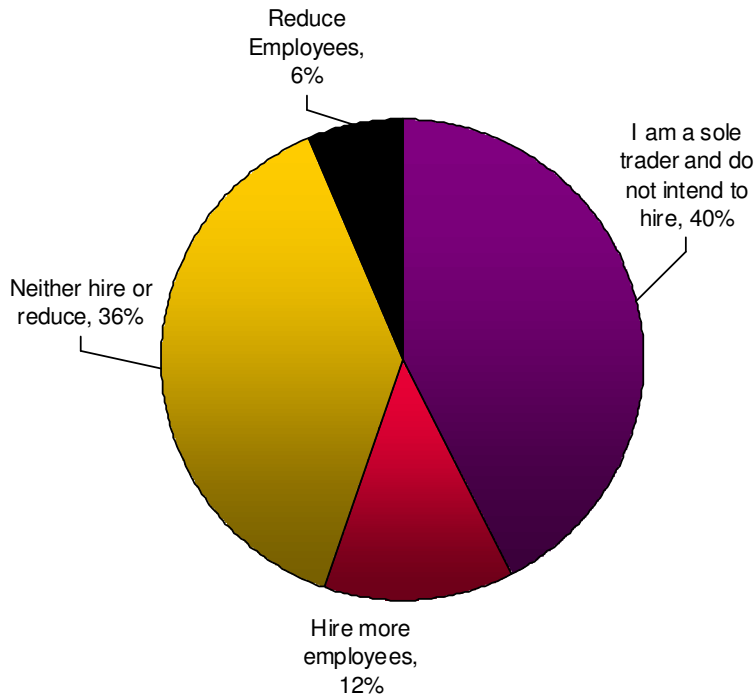


Figure 14.1: Expectation of hiring employees within the next 12 months by business size (%)

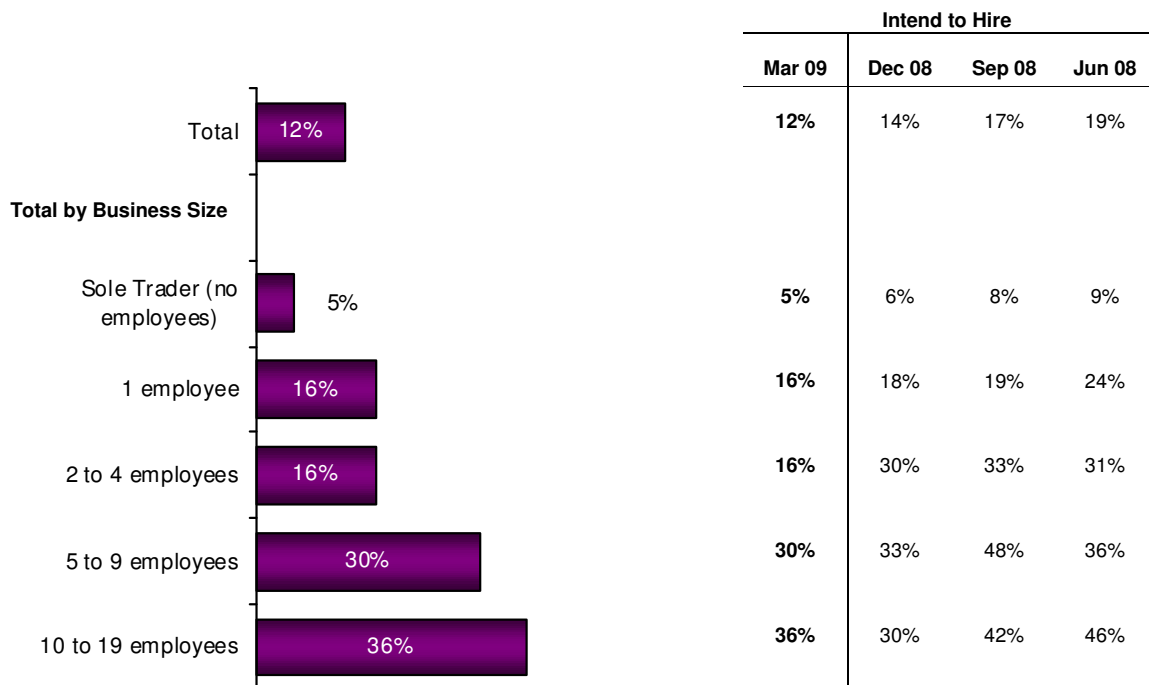
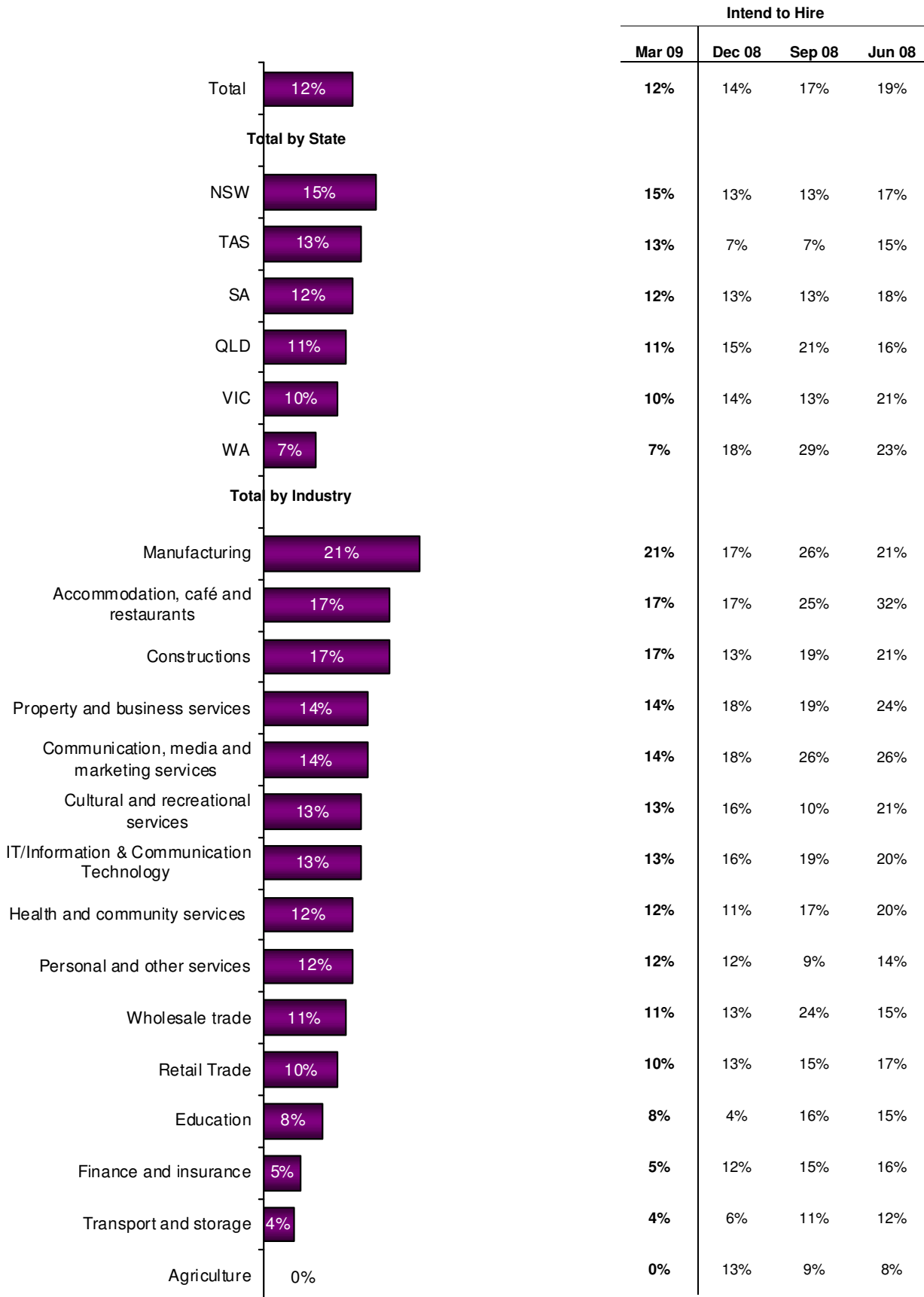


Figure 14.2: Expectation of hiring employees within the next 12 months by state and industry (%)



Base: Small business owners (**n=1503**)

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

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AMR Interactive, March 2009

There has been a slight decline in the number of small business owners surveyed who intend on hiring more employees over the coming 12 months, with 12% intending to do so. This is down from 19% in June 2008. A total of 36% of small business owners do not intend on reducing or increasing the number of employees in their business.

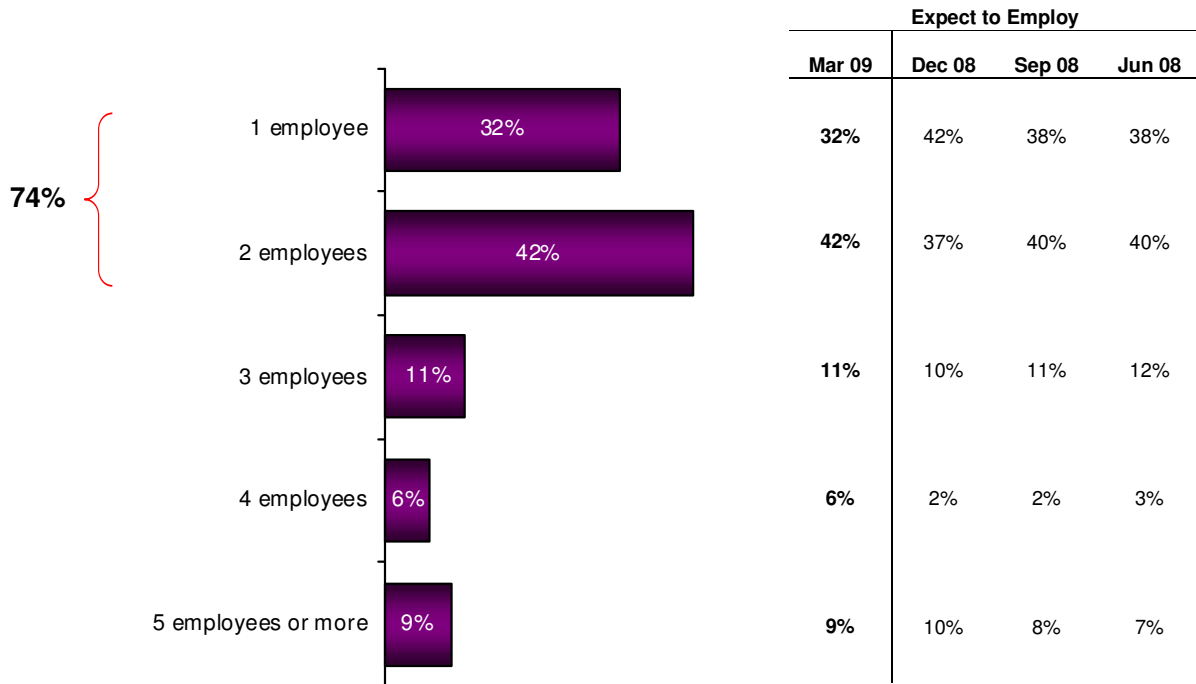
There has been a 50% drop from the number of small business owners with 2 to 4 employees who intended to hire in December 2008 (from 30% to 16%). While 36% of small businesses with 10 –19 employees indicated they intend to hire, compared to 30% in December 2008.

Small businesses in Western Australia (7%), and also the Transport and Storage sector (4%), are less likely to be hiring than other small businesses.

## Expectations for employment

**Of those small business owners who intend to hire (11%), 74% intend to hire one or two employees**

Figure 15: Number of employees intended to hire over the next 12 months (%)



Base: Small business owners that expect to hire more employees in the next 12 months (n=165)

Q: How many employees do you intend to hire in the next 12 months?

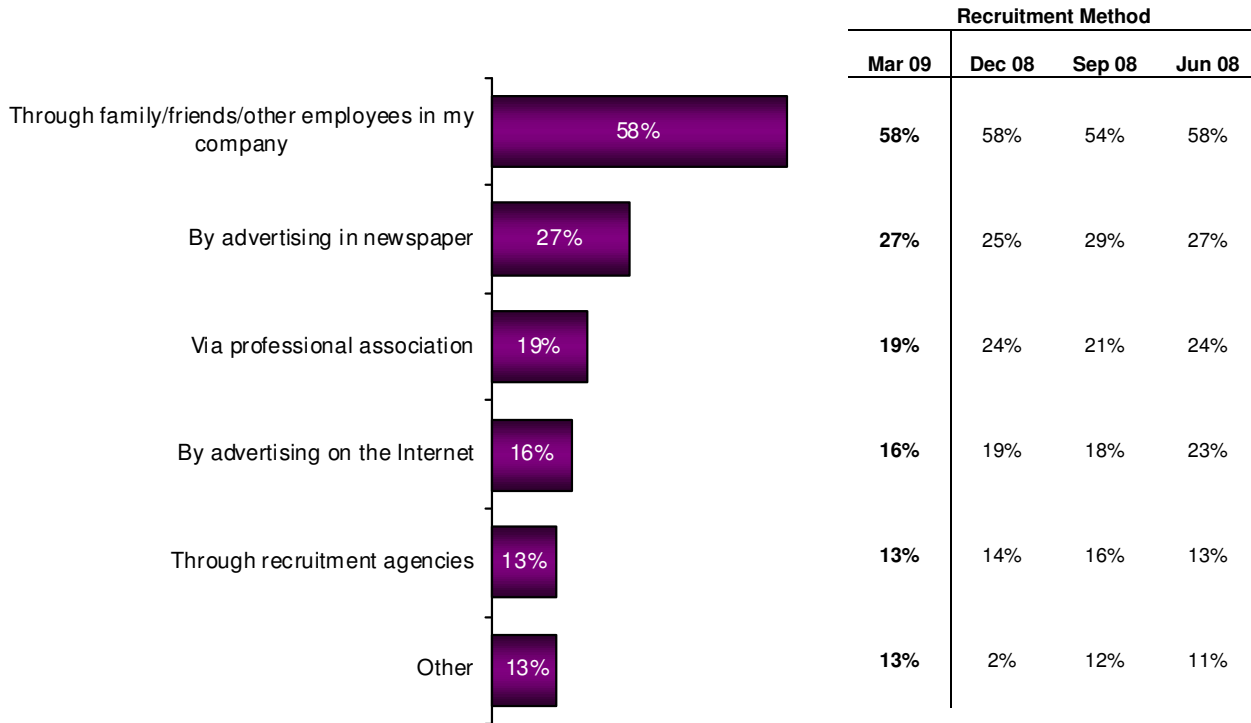
AMR Interactive, March 2009

As with previous quarters, of those small business owners surveyed who intend to hire additional employees over next 12 months (11% of sample), 74% of this group intend on hiring either one or two employees.

**Preferred method of recruitment**

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

Figure 16: Method of seeking employees (%)



Base: Small businesses that have one or more employees (n=942)  
 Q: How do you find your employees? (Multiple responses)

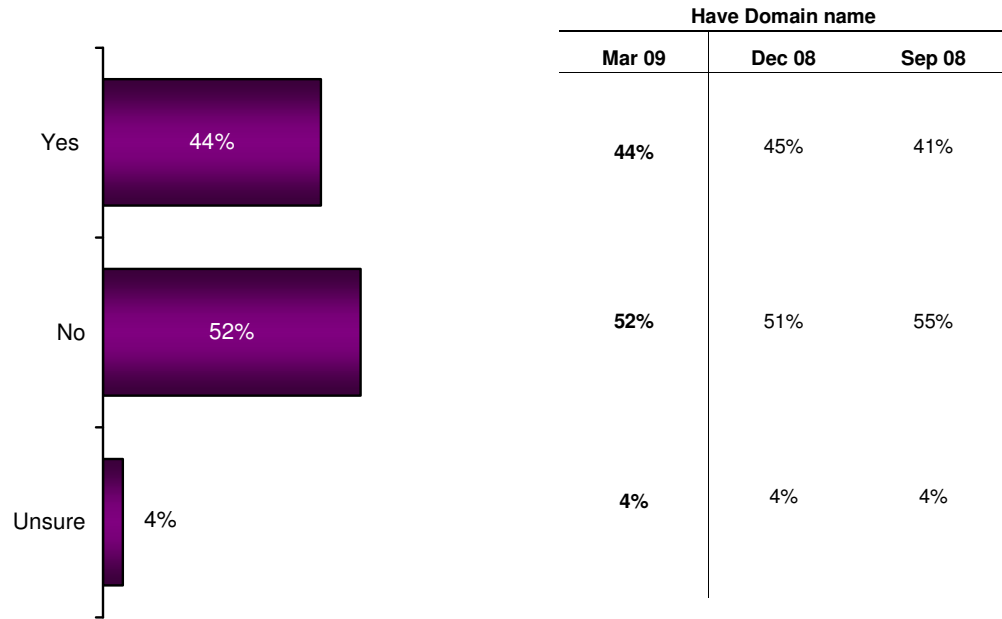
AMR Interactive, March 2009

Of those small businesses with one or more employees (63% of sample), recruiting potential employees through family, friend and other employees (58%) remains the most common method for recruitment. This has remained consistent since December 2008.

**Domain name registered**

**Over half (52%) of small businesses surveyed don't have a domain name registered**

Figure 17: Small business having domain name registered (%)



Base: Small business owners (n=1503)  
 Q: Does your business have a domain name registered?

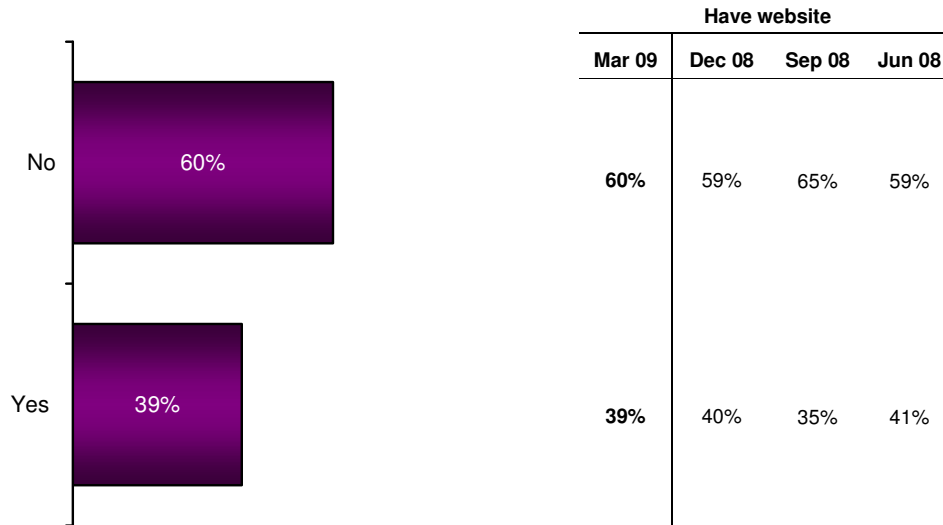
AMR Interactive, March 2009

While 52% of small business owners surveyed don't currently have a business domain name registered, 44% do. These figures have remained consistent since December 2008.

**Business website**

**39% of small businesses surveyed have a website**

Figure 18: Small businesses with a website (%)



Base: Small business owners (n=1503)  
 Q: Does your business have a website?

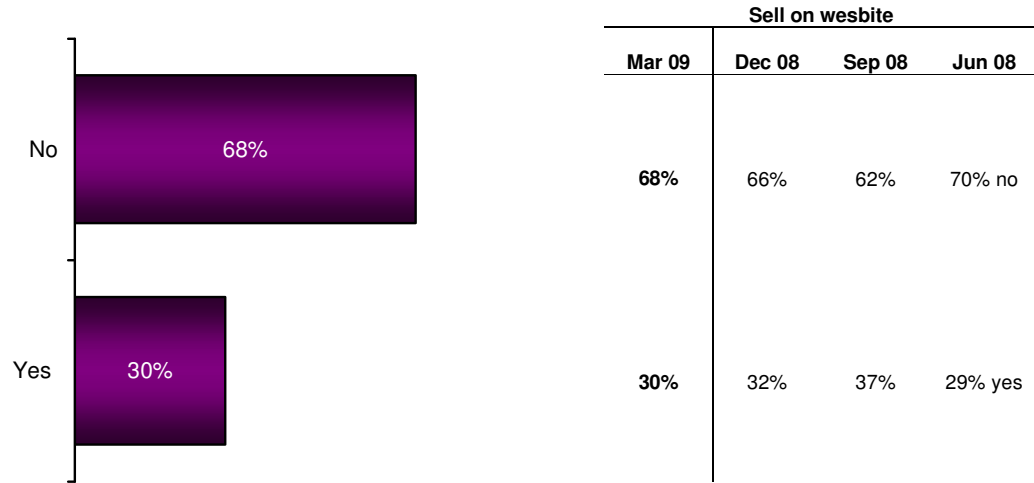
AMR Interactive, March 2009

More than half (60%) of small businesses surveyed don't currently have a business website, which is consistent with the previous quarter. The current 39% of small businesses with a website almost mirrors the result from December 2008.

**Selling on website**

**Of those small businesses with a website (39%), 30% of this group sell goods or services on their website**

Figure 19: Selling goods/services via company website (%)



Base: Small business owners that do currently have a website (n=657)

Q: Do you sell goods or services via your website (e.g. an online shopping or e-commerce facility)?

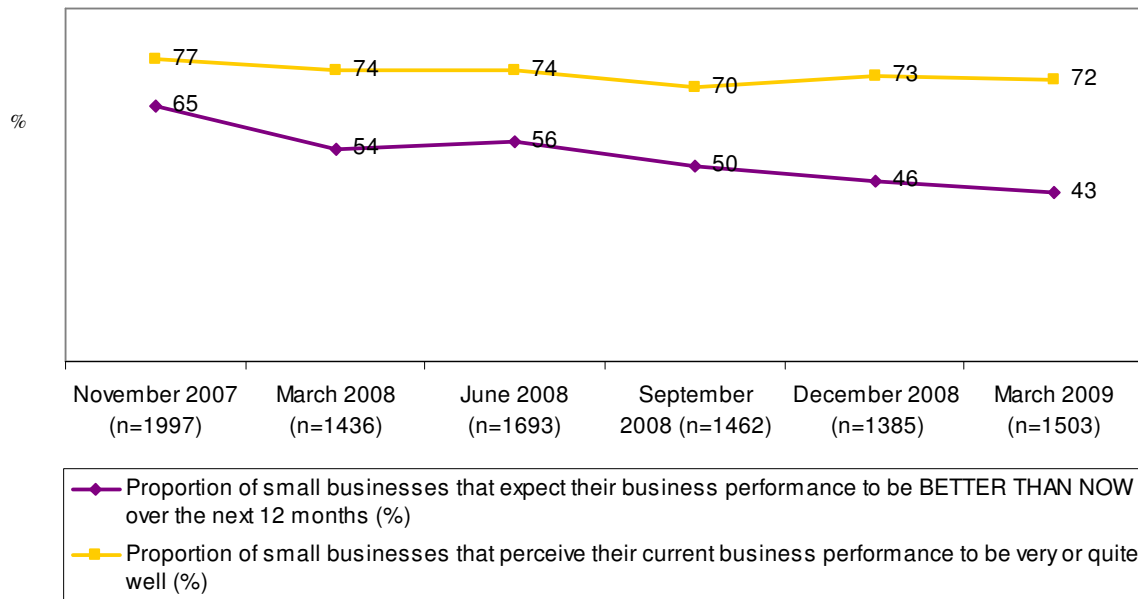
AMR Interactive, March 2009

Of the small businesses who do have a website (44% of sample), the majority (68%) of this group don't currently sell goods or services via this business website. However, 30% of these small business owners do.



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

Figure 20: Small businesses' confidence in business prospects and expectations for the economic performance over 12 months time

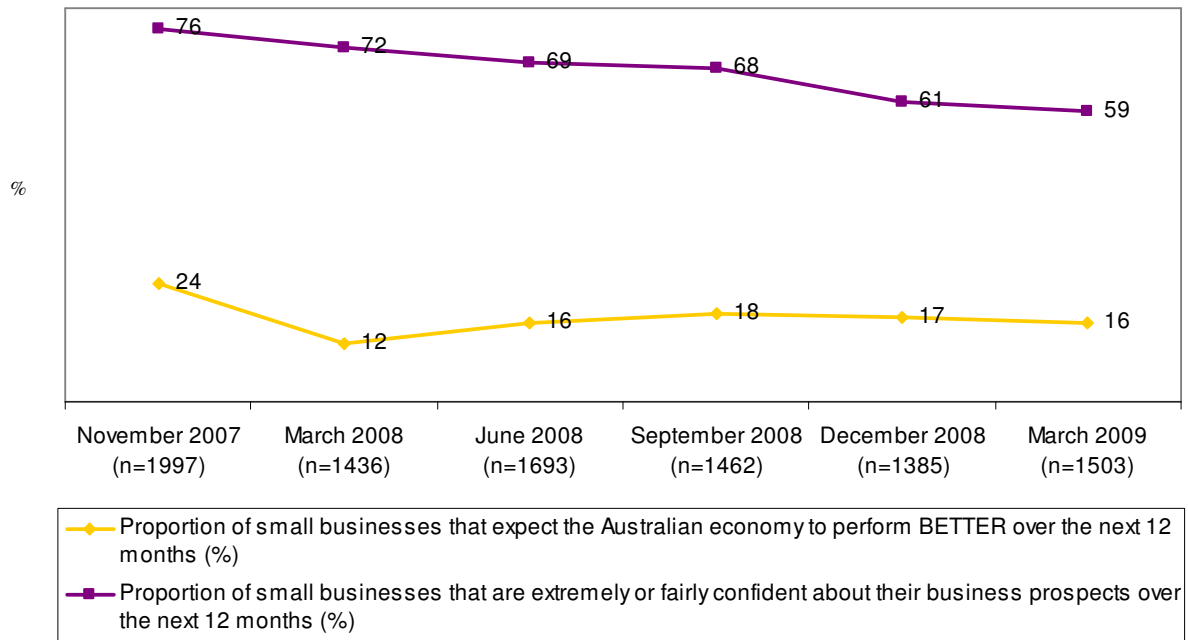


Base: Small business owners (n=1503)

AMR Interactive, March 2009

## Appendix 2 – Confidence in business & economy outlook

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

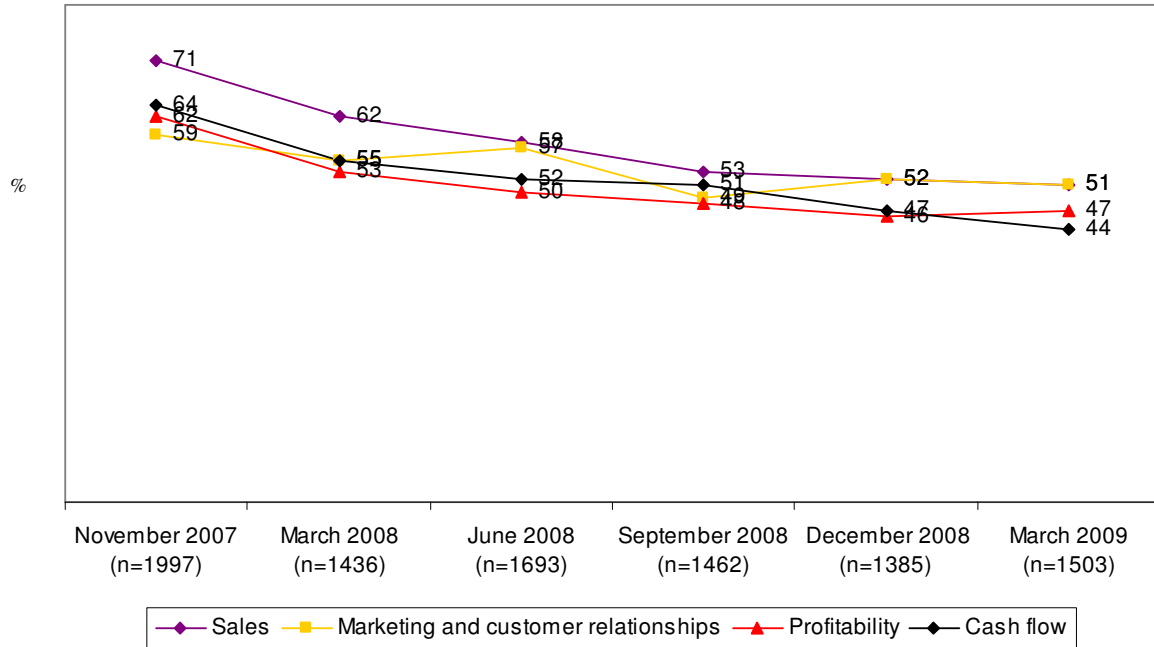


Base: Small business owners (n=1503)

AMR Interactive, March 2009

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

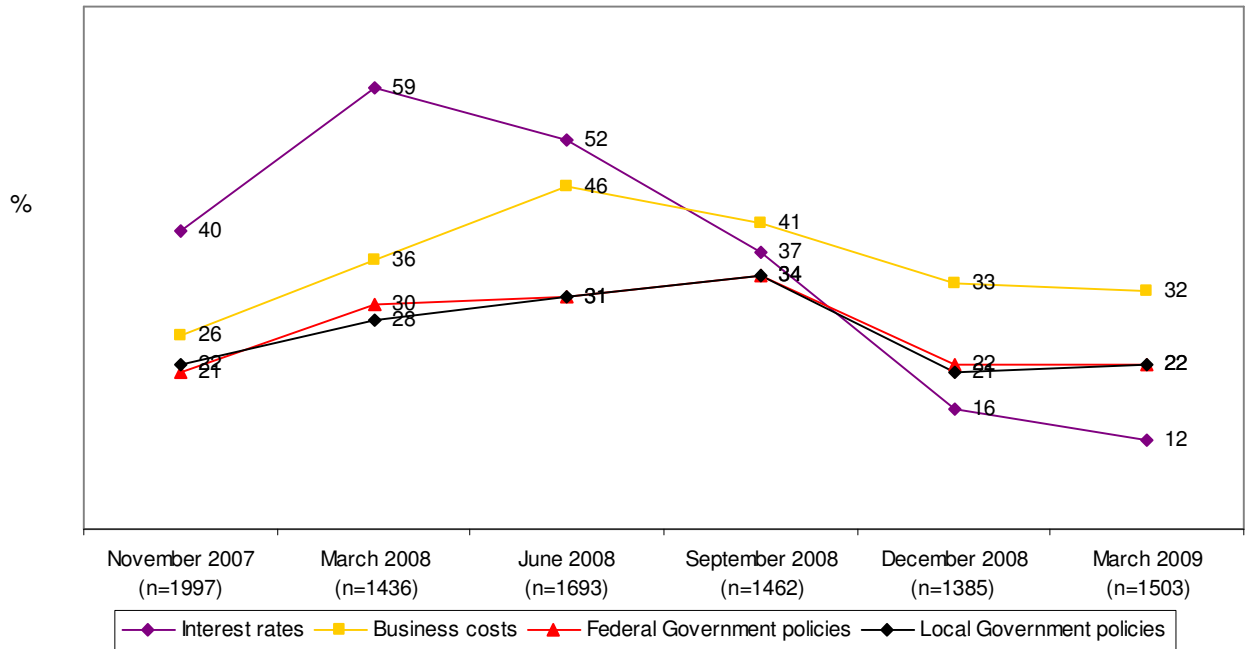
Figure 22: Proportion of small businesses with POSITIVE outlook for specific business issues over the next 12 months



Base: Small business owners (n=1503)

AMR Interactive, March 2009

Figure 22.1: Proportion of small businesses with NEGATIVE outlook for specific business issues over the next 12 months

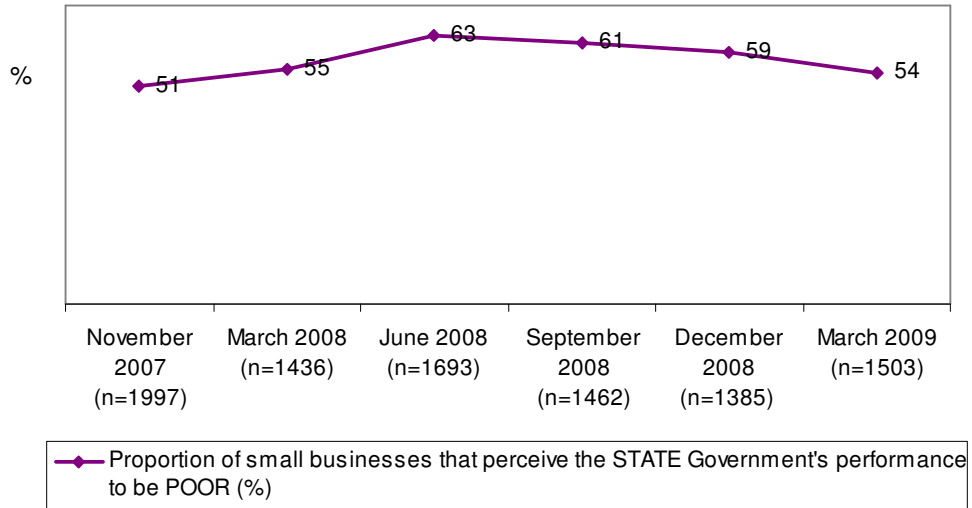


Base: Small business owners (n=1503)

AMR Interactive, March 2009

## Appendix 4 – Perceptions of State Government performance

Figure 23: Small businesses' perceptions of the State Governments' performance in contributing to the development of small business in Australia



Base: Small business owners (n=1503)

AMR Interactive, March 2009

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

1. Hire more employees
2. Reduce employees
3. Neither hire nor reduce
4. I am a sole trader and do not intend to hire
9. Don't know/Unsure

If Q (1) ASK;

Q: How many employees do you intend to hire in the next 12 months?

1. 1 employee
2. 2 employees
3. 3 employees
4. 4 employees
5. 5 employees or more

If Q (2) ASK;

Q: How many employees do you intend to reduce by in the next 12 months?

1. 1 employee
2. 2 employees
3. 3 employees
4. 4 employees
5. 5 employees or more

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)

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

Q: Do you sell goods or services via your business website (e.g. an online shopping or e-commerce facility)?

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. 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. 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