

# City of Wagga Wagga

Economic Development & Business Study

Stages 3 and 4: Business Confidence Surveys

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# Project Background



**Project  
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Stages 1 & 2

Key Insights:  
Stages 3 & 4

Telephone  
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# Background & Methodology

## Background

Wagga Wagga City Council sought to conduct a multi-stage Economic Development and Business Study. Stage 1 was conducted by Council and Micromex Research was commissioned to conduct Stages 2 to 5. Components of the research program include:

Stage 1: Online survey of Wagga Wagga City Council Councillors (N=4 completes achieved)

Stage 2: Tele-depths with 15 business-related stakeholders – with the questionnaire informed by the Stage 1 Results (see separate report)

**Stages 3-4: Phone survey of local businesses (N=202); online version of the phone survey for other local businesses to complete (N=36). This Report summarises the results of these two stages.**

Stage 5: Councillor Workshop (not yet convened) – the content of this stage will be informed by the insights derived from Stages 1-4.

## Objectives

The overarching purpose of this research program was to provide Wagga Wagga City Council with a robust baseline measure of the attitudes and perceptions of businesses within the LGA.

Specific parameters of the research program included:

1. Engaging with the Wagga Wagga business community so as to ensure that the Council continues to be well informed about business issues and trends in Wagga Wagga
2. Identifying potential areas for Council action to promote economic development and increase the competitiveness of local businesses
3. Provide statistical information which is of particular interest to the Wagga Wagga business community



# Background & Methodology

## Data collection

Micromex Research, together with Wagga Wagga Council, developed the telephone/online questionnaire.

## Data collection period

Telephone Survey: Telephone interviewing (CATI) was conducted from 7<sup>th</sup> – 14<sup>th</sup> May 2019.

Online Survey: The online survey was open for completion from the 7<sup>th</sup> – 31<sup>st</sup> May 2019. Wagga Wagga City Council emailed Stakeholders an invitation to participate in the research. Stakeholders were also requested to forward the survey invitation to their members. Council also promoted the survey via their social media channels. Business owners who declined participation in the telephone survey were also advised of the opportunity to provide feedback via the online survey.

## Sample

Telephone Survey: N=202 interviews were conducted. A sample size of 202 provides a maximum sampling error of plus or minus 6.9% at 95% confidence. This means that if the survey was replicated with a new universe of N=202 residents, that 19 times out of 20 we would expect to see the same results, i.e. +/- 6.9%. For example, an answer 'yes' (50%) to a question could vary from 43% to 57%.

The 202 respondents were selected by means of a computer based random selection process using a B2B database provided by Prospect Marketing.

Telephone interviewing was conducted in accordance with the AMSRS Code of Professional Behaviour.



# Background & Methodology

## Sample (continued)

Online Survey: N=36 respondents completed the interview via the supplied online survey link. Businesses were emailed an invitation to take part in the survey, with responses submitted via a provided online link.

## Data analysis

The data within this report was analysed using Q Professional.

Significance difference testing is a statistical test performed to evaluate the difference between two measurements. To identify the statistically significant differences between the groups of means, 'One-Way Anova tests' and 'Independent Samples T-tests' were used. 'Z Tests' were also used to determine statistically significant differences between column percentages.

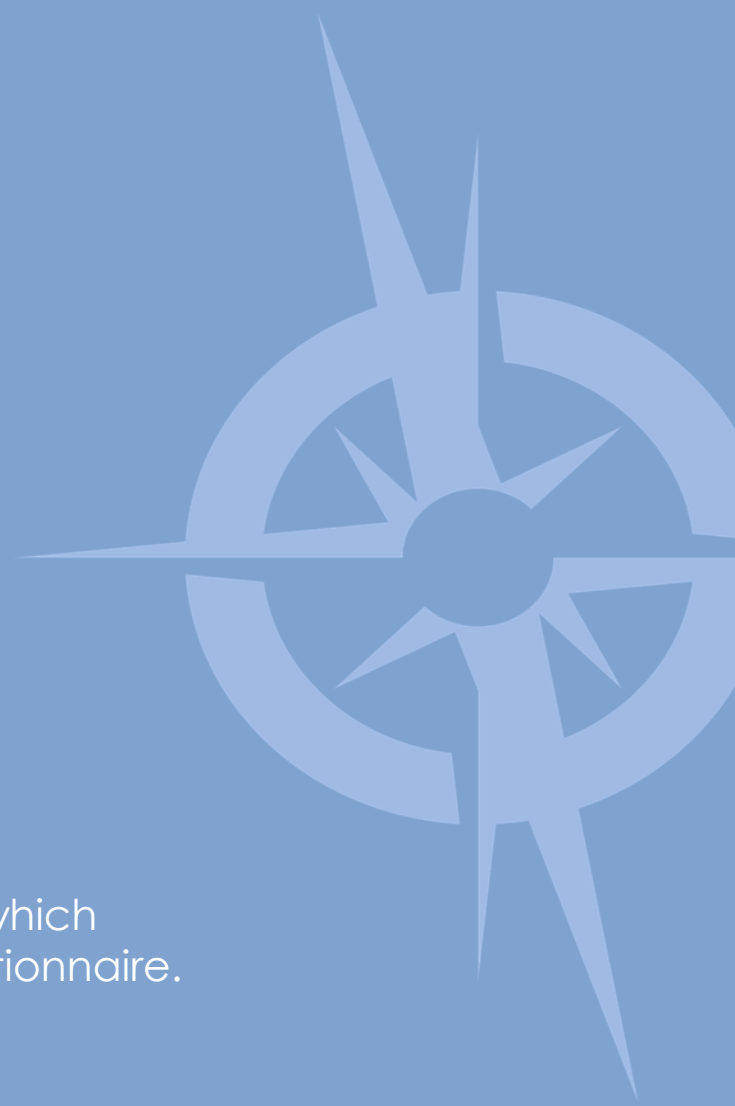
Within the report, ▲▼ and ↑↓ are used to identify statistically significant differences between groups, i.e., methodology (telephone/online), business size, industry, those who own/manage businesses outside the Wagga region as well as by likelihood of actively encouraging business to the Wagga region.

All percentages are calculated to the nearest whole number and therefore the total may not exactly equal 100%.



# Recap: Stages 1 & 2

This summary provides a recap of the first two stages, which informed the development of the Stages 3 and 4 questionnaire.



Project  
Background

**Recap:  
Stages 1 & 2**

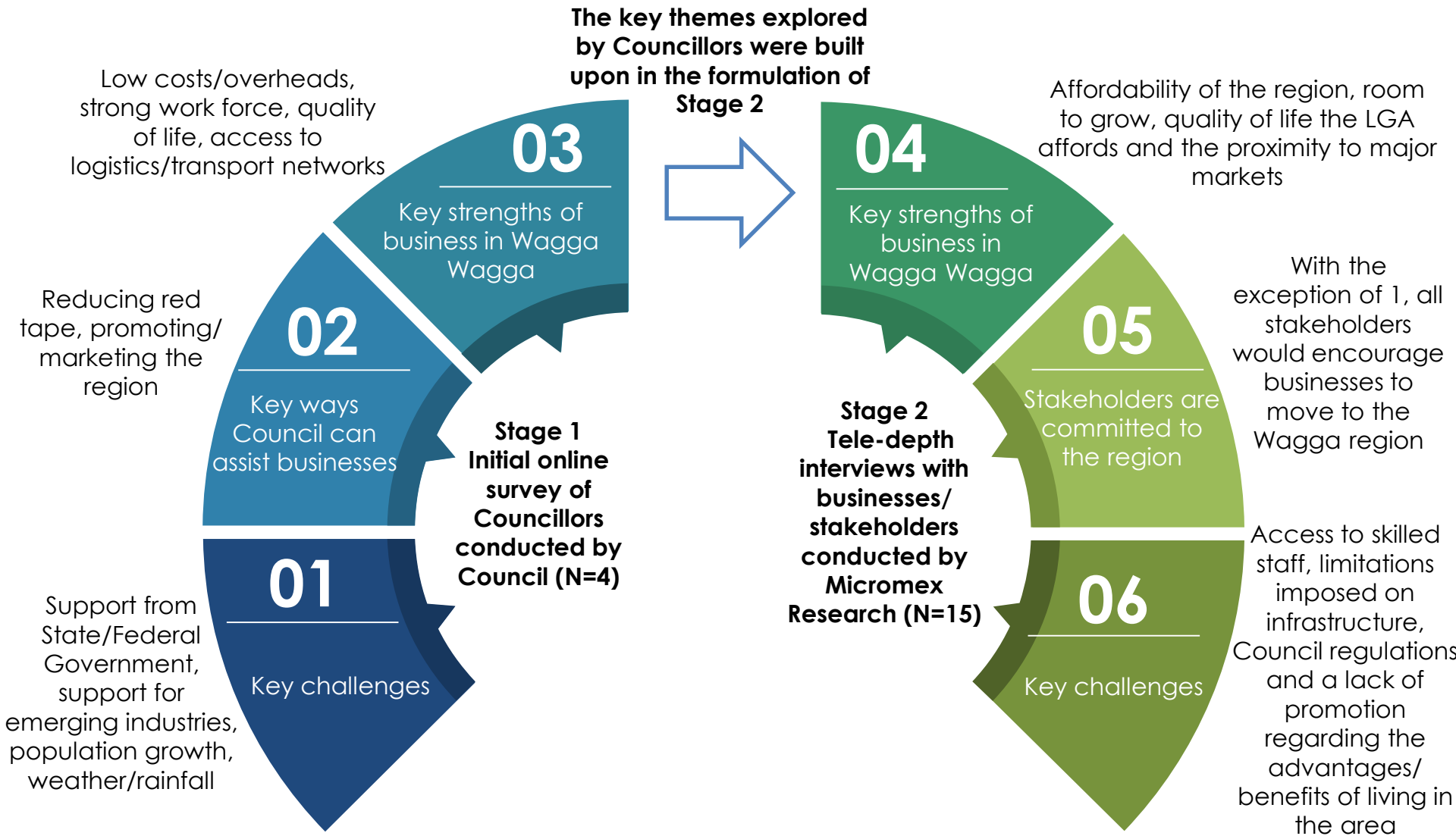
Key Insights:  
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# Key Insights: Stages 1 & 2



These key findings were used to inform the scope of Stages 3 and 4 (Discussed in this report). For instance, knowing the dominance of 'quality of life' as a key strength of the region, in Stages 3 and 4 we specifically asked respondents to think more about employment/business issues rather than quality of life.



# Key Insights: Stages 3 & 4



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# Key Findings

The results of this research program have provided key benchmark findings on economic trends and business perceptions in the region. The findings are split into 2 sections, the first includes the results of the robust telephone interview of N=202 business owners/managers. The second section includes the results of the same survey available online to businesses (N=36 responses achieved – Due to the low sample size, these results should be viewed from an interest point only).

## Phone Survey:

Key findings/opportunities are as follows:

### Businesses are Generally Positive:

Most businesses are positive – for instance:

- 70% indicated they were 'confident/extremely confident' about their business prospects over the past two years – and an almost identical proportion (68%) said the same about their confidence for the next two years.
- Whilst 18% of businesses said their current business performance was 'a little/a lot worse' than two years ago, 47% said it was 'a little/a lot better'.
- 52% of business owners have experienced an increase in sales over the last 2 years
- 36% of businesses have increased their profitability in the last 2 years
- 51% have experienced increased capital expenditure in the last 2 years – so they are investing in the area.
- 96% of respondents indicated they were 'not very/not at all likely' to move their business away from the region over the next two years – in fact, 88% committed to the top 'not at all likely' code.
- 60% indicated they were 'likely/very likely' to actively encourage businesses to move to the Wagga region.



# Key Findings

## At-risk Businesses are at a Manageable Level

Following on from the previous slide, from a 'disaster-check' perspective, negative responses were generally not excessive - for instance:

- Only 8% of businesses were 'not very/not at all confident' over the past two years – and only 7% gave those ratings when thinking about the next two years.
- Only 3% of businesses were considering moving away from the area.
- 17% were 'likely/very likely' to close/sell their Wagga-based business in the next two years – and whilst these businesses were more likely to be performing less well than two years ago and have more pessimistic confidence forecasts for the next two years, main reasons given for closing/selling were 'retirement/health' and 'seeking a change in career' rather than poor business conditions.
- 13% were 'not very/not at all likely' to recommend the region to other businesses.
- 12% have seen a decrease in their workforce over the past two years.



# Key Findings

## Ample Opportunities to Help Businesses

Based on a number of different measures, there are indications that businesses could benefit from additional help/support:

- Following on from the previous slide, a number of businesses gave **ambivalent** responses that suggest they could benefit from some additional support – for instance, 21% of respondents indicated that they were only 'somewhat confident' about their business prospects over the past two years – and an identical proportion said the same about their prospects over the next two years.
- 32% of businesses mentioned they were at least somewhat likely to expand their Wagga-based business over the next two years.
- Perceptions of **future** economic health (for both the local economy and the NSW/VIC economies) were more positive than perceptions of **current** economic health.
- There is a sense in the data that businesses are naturally cautious – for instance:
  - Whilst 18% of businesses said their current business performance was 'a little/a lot worse' than two years ago, 47% said it was 'a little/a lot better' – in other words, things are improving for almost one in two businesses.
  - And as noted above, perceptions of future economic health were more positive than were current perceptions.
  - Yet the overall business confidence rating for the next two years is almost identical to the confidence rating for the past two years. The challenge for Council is to work with businesses so their cautious mindset doesn't dampen their entrepreneurial drive.



# Key Findings

## Key Positive Drivers

A number of key positive themes/drivers emerged from the survey data:

- The liveability of the region: Stages 1 and 2 of the research program saw considerable emphasis placed on the quality of life the Wagga region affords businesses/employees and their families. In the Stage 3 telephone survey, we asked respondents to offer (unprompted) the benefits/advantages that the Wagga region offers **apart from** quality of life aspects. Interestingly, 25% said there were no other advantages other than liveability – and a further 5% simply couldn't say – this suggests that for up to 3 in 10 businesses, liveability is the only advantage/benefit of the region.
- Central location between/hub for Sydney/Melbourne/Canberra/Adelaide. Extensions of this idea include a hub for local regional areas, and access to major transport links.
- Growth: Both in terms of population, and steady economic growth.
- Owners enjoy lower running costs.
- Ease of getting around within the area/lack of congestion.
- Education opportunities/University provides well educated/skilled staff.
- Strong existing client base.



# Key Findings

## Key Challenges/Opportunities

A number of key challenges/opportunities also emerged from the survey data:

- Increasing costs of materials. This was the dominant challenge selected by respondents from a pre-coded list of 22 items. And on a separate question, when asked about seven business performance indicators, 'prices of supplies and materials' generated the highest number of 'increased' mentions.
  - Although not as pronounced, increases in wages bills/cost of staff was also mentioned as a main challenge facing businesses.
  - The potential impact of these increases is perhaps best illustrated by the fact that 26% of businesses claimed to have experienced decreased profit over the past two years.
- Finding and keeping skilled staff was the equal second highest challenge nominated by respondents. For some, it is a very serious challenge:
  - Only 25 of the 202 businesses claimed to have decreased their workforce in the past two years.
  - However, 16 of the 25 (so 8% of the total sample) claimed it was due to being unable to find appropriately skilled staff.
  - A further 104 businesses indicated they had made no change to their staff levels over the past two years – and 38 of the 104 (19% of the total sample) also claimed it was due to being unable to find appropriately skilled staff.
  - That's an estimate of 27% (8% plus 19%) of businesses saying their lack of hiring is due to insufficient availability of skilled staff.
- Of concern is that 47% of respondents cited 'inadequate internet speed or coverage' as a challenge facing businesses.



# Key Findings

## Key Challenges/Opportunities (continued):

Other challenges/opportunities selected from the list of 22 included:

- Climate uncertainty/less predictable rain.
- Increased competition – and if anything this was likely to become more of an issue in the future.
- Influence of State/Federal Government politics/excessive State or Federal Government regulation (both of which were marginally higher than 'excessive local Council regulation').
- Wagga is not promoted enough to attract more people/businesses.
- Other challenges volunteered by respondents (unprompted) included: 'lack of parking/lack of unmetered parking' and 'competition from online businesses'.

## Online Survey:

### Key findings

The industry profile of the 36 online respondents was quite different to the phone sample, with a far larger white collar representation and far fewer retail businesses.

On most key metrics, the online sample was a little more positive than was the phone sample – in some cases significantly (although in most cases not).

One very noticeable difference between the two samples is that the online respondents were more concerned about the influence of State and Federal Government.



# Key Findings

## Comparing Industries (Telephone Sample)

- Analysis of the telephone survey results by industry type (see summary in following slide) has shown specific industries to be stronger in terms of business confidence/growth.
- Businesses within the Health Care and Social Assistance industry have shown stronger results across a number of measures, including:
  - Business confidence
  - Business expectations
  - More likely to encourage businesses to move to the area
  - Increased size of workforce
  - Lower likelihood of closing/selling the business
- Businesses within the Education and training sector have also experienced stronger results across the following measures - Business confidence, business performance, business prospects in the next 2 years and likelihood of continuing business
- The above results may reflect the recent development and investment into health and education in the region, and highlight the importance of Council's role in promoting and supporting small business in the region.
- In contrast, Retail Trade shows significantly less confidence with past business prospects as well as lower business performance compared to 2 years ago, future business confidence, lower likelihood to actively encourage businesses to the area as well as higher likelihood of closing/selling in the next 2 years.



# Wagga Wagga Region – Industry Health Check (Phone Sample)

Key Business Measures	Retail Trade (N=39)	Health Care and Social Assistance (N=27)	Accomm. and Food Services (N=20)	Construction (N=18)	Education and Training (N=17)	Manufacturing (N=17)	Professional, Scientific & Technical Services (N=11)	Agriculture, Forestry and Fishing (N=9)	Other white collar (N=12)	Other blue collar (N=32)
Business confidence – Past 2 years	Significantly lower	Significantly higher	On par	On par	Higher	Lower	Higher	Lower	Higher	On par
Business performance compared to 2 years ago	Lower	Higher	Higher	On par	Higher	Lower	Higher	Higher	Lower	On par
Business confidence – Next 2 years	Lower	Significantly higher	Lower	On par	Higher	Lower	Higher	Lower	Lower	On par
Likelihood of closing/selling (higher = better result)	Lower	Significantly higher	Lower	Significantly higher	Significantly higher	Lower	On par	Higher	Lower	On par
Likelihood of moving away from the Region (higher = better result)	On par	On par	On par	On par	On par	Higher	Higher	Higher	Higher	Lower
Likelihood of expanding existing Wagga-based business	Lower	Higher	Higher	Lower	Lower	Lower	Lower	Higher	Lower	On par
Likelihood of encouraging businesses to move to the Wagga region	Lower	Higher	Lower	Higher	On par	Higher	Higher	Higher	Lower	On par
Local economy health - Current state	Lower	Higher	Higher	Higher	Higher	Lower	Lower	Higher	Higher	Lower
NSW and VIC economies health - Current state	Higher	Lower	Higher	Lower	Higher	On par	Lower	Lower	Higher	Lower
Local economy health - Next 2 years	On par	Higher	Higher	Higher	Lower	Higher	On par	Lower	Higher	Lower
NSW/VIC economies health - Next 2 years	Lower	Higher	Higher	Higher	Higher	Lower	On par	Higher	Lower	Lower
Business performance - Prices of supplies and materials	Lower	Lower	Higher	Lower	Lower	Higher	Higher	Lower	Significantly higher	Significantly higher
Business performance - Wages bill	Lower	Higher	Higher	Higher	Significantly higher	Higher	Lower	Lower	On par	Lower
Business performance - Capital expenditure	Lower	Lower	Higher	Lower	Higher	Higher	Higher	Lower	Higher	Higher
Business performance - Size of workforce	Lower	Significantly higher	On par	Lower	Significantly higher	Lower	Lower	Higher	Lower	Lower
Business performance – Sales	On par	Higher	Higher	Higher	Lower	Lower	Lower	Higher	Lower	Higher
Business performance - Profitability	On par	Higher	Higher	On par	Higher	Lower	Lower	Lower	Lower	Lower
Business performance - Lending	Significantly lower	On par	Higher	Higher	Lower	Higher	Higher	Higher	Higher	Higher

Positive result
Neutral result
Negative result

# Stage 3: Telephone Interview Results



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# Sample Profile



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# Sample Profile – Telephone

## Business industry



Retail Trade  
19%



Health Care/  
Social Assistance  
13%



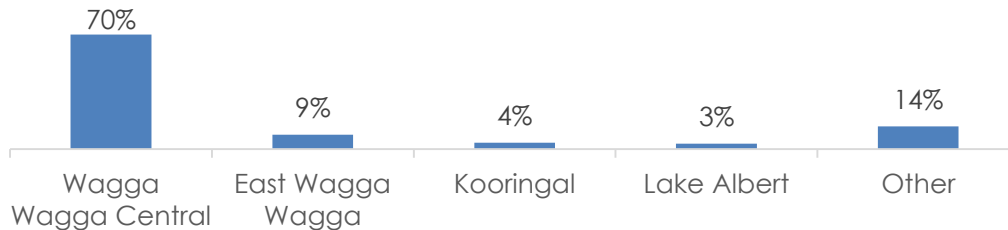
Accommodation/  
Food Services  
10%



Construction  
9%

**N=202**  
**Wagga Wagga**  
**Businesses**  
**Interviewed via**  
**Telephone**

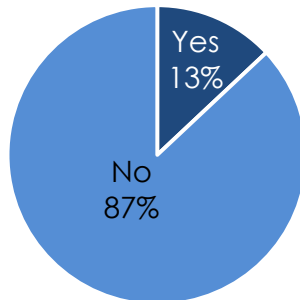
## Business location



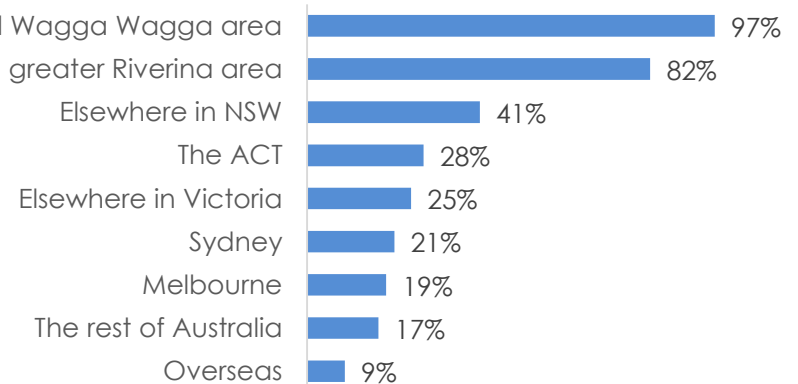
## Size of business



## Own/Manage another business outside the Wagga region



## Areas serviced



Note: For complete demographic profile, please see Appendix B

In the Stage 2 Stakeholder IDI's, six of the nine participants who ran businesses in the Wagga area also had business interests outside the area, which suggested both an opportunity to bring more business to Wagga – but also a potential threat to lose Wagga-based business to other regions. In this larger, more representative sample, only 13% of local businesses have other business interests elsewhere.

# Detailed Results



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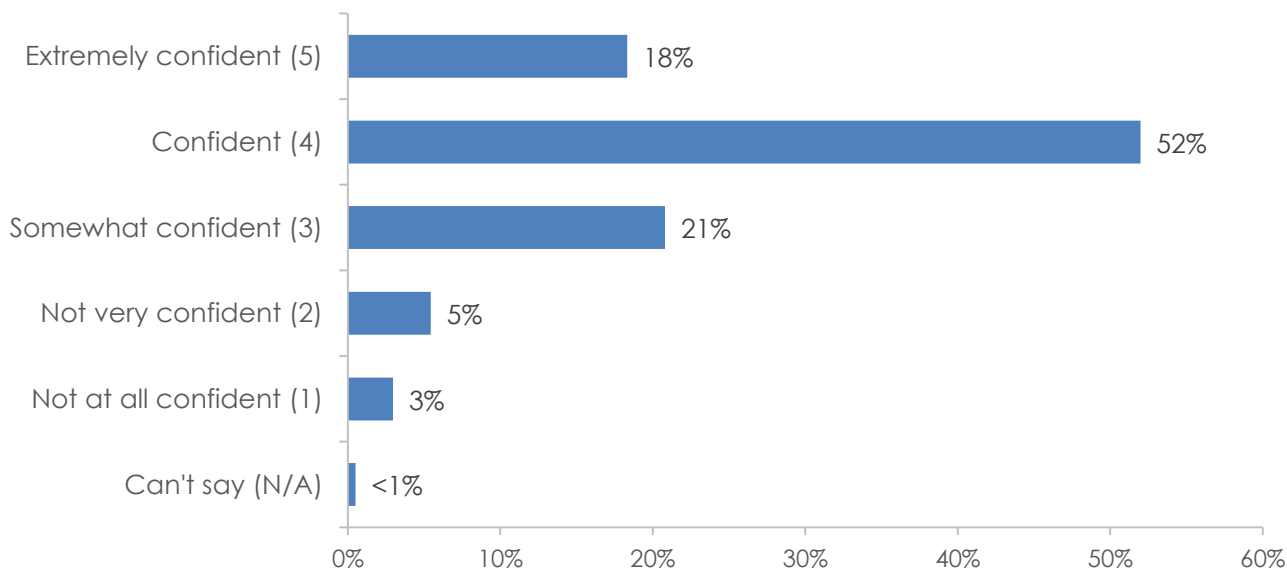
# Business Confidence Over the Past Two Years



Q3a. Over the past two years, how confident have you been about your business prospects?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Mean ratings	3.78	3.49▼	4.11▲	3.75	3.83	4.00	3.71	3.91	3.56	3.82	3.75
Base	201	39	27	20	18	17	17	11	9	11	32

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Mean ratings	3.74	4.00	3.85	3.76	3.19▼	3.70	3.92▲
Base	170	31	27	174	26	46	121



Scale: 1 = not at all confident, 5 = extremely confident

▲▼ = A significantly higher/lower level of confidence (by group)

Base: N = 202

**Overall, confidence in business prospects over the past 2 years has been moderately strong in the Wagga region, with 70% of respondents having been extremely confident/confident.**

**Whilst analysis by industry type is difficult due to small sample sizes, indications are that those in Health Care and Social Assistance expressed a significantly higher degree of confidence, while those in Retail Trade expressed a significantly lower level of confidence.**

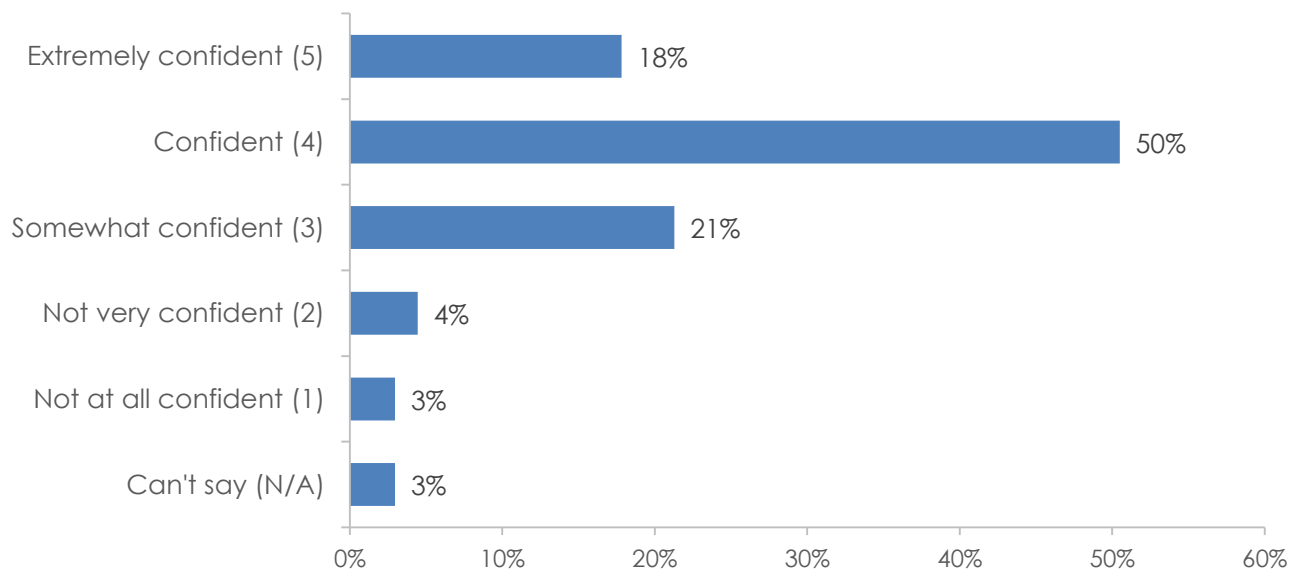
# Business Prospects in the Next Two Years



Q3b. And thinking about the next two years, how confident do you feel about your business prospects?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Mean ratings	3.78	3.61	4.19▲	3.63	3.76	4.00	3.71	3.82	3.56	3.64	3.77
Base	196	38	27	19	17	16	17	11	9	11	31

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Mean ratings	3.75	3.94	3.78	3.78	3.20▼	3.68	3.92▲
Base	164	32	27	169	25	44	119



Scale: 1 = not at all confident, 5 = extremely confident

▲▼ = A significantly higher/lower level of confidence (by group)

Base: N = 202

Looking forward, confidence in business prospects for the next 2 years remains steady, with 68% of respondents extremely confident/confident (7% not very/not at all confident).

Those within the healthcare and social assistance industry expressed a significantly higher level of confidence in business prospects, as did those who are likely to encourage businesses to the area.

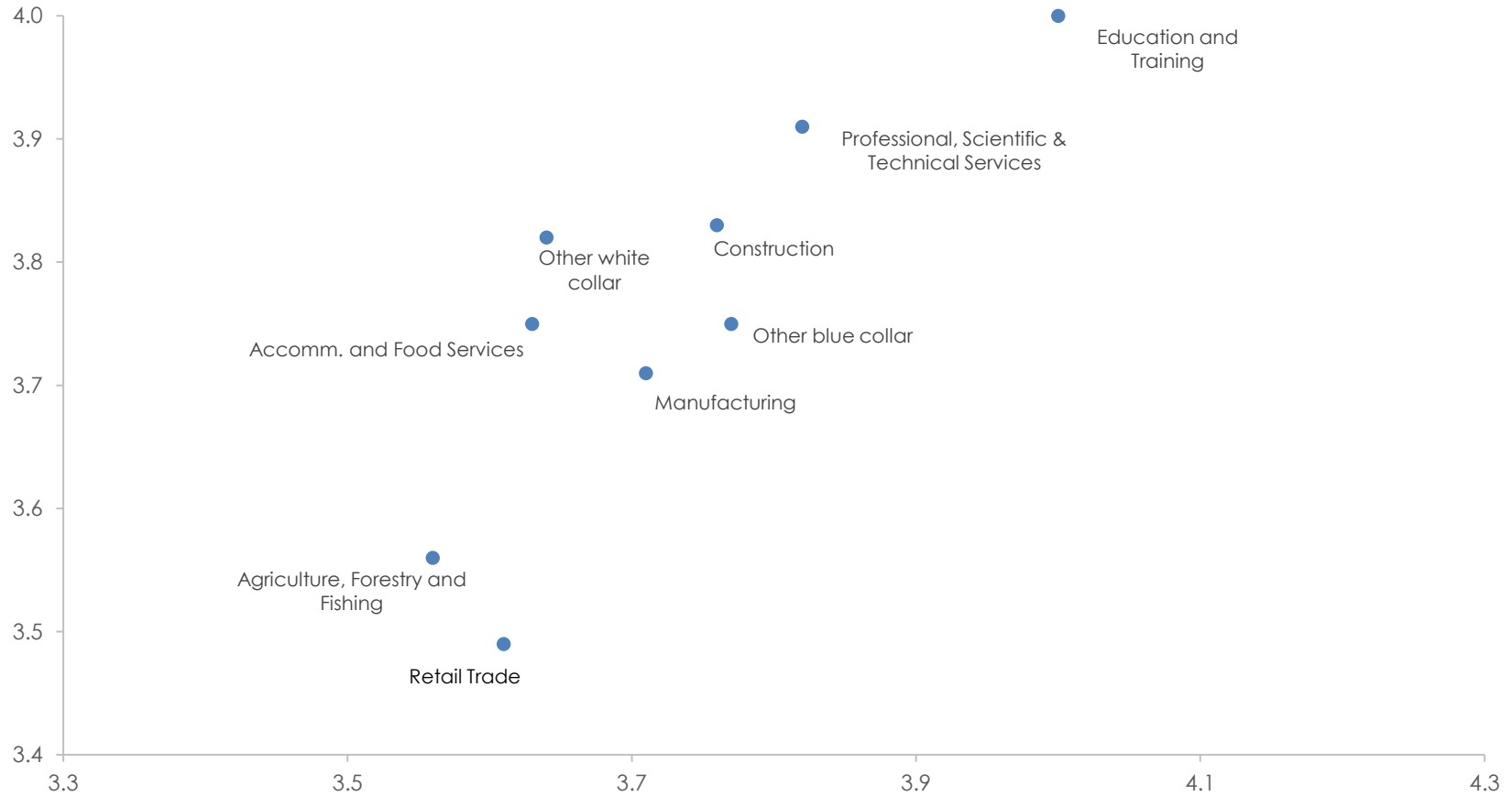
# Business Confidence By Industry



Q3a. Over the past two years, how confident have you been about your business prospects?

Q3b. And thinking about the next two years, how confident do you feel about your business prospects?

Confidence in Business Prospects – Last 2 Years



Confidence in Business Prospects – Next 2 Years

By charting respondents' confidence in business prospects for the last 2 years against anticipated business prospects in the next 2 years, we can see which industries in the Wagga region are most at risk – some of the sample sizes are very small (e.g.: only 9 Agriculture respondents), however, there is a suggestion in the data that 'Retail Trade' and 'Agriculture' are under pressure.



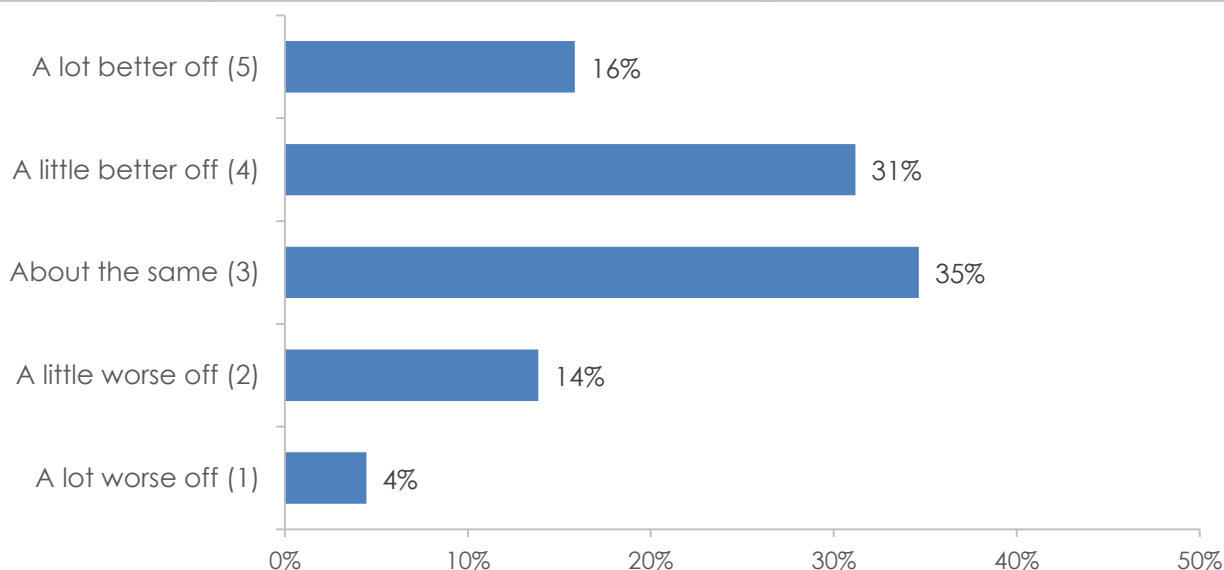


# Business Performance Compared to Two Years Ago

Q3c. Overall, how is your business performing now compared to two years ago?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Mean ratings	3.40	3.21	3.70	3.75	3.39	3.53	2.94	3.45	3.78	2.92	3.41
Base	202	39	27	20	18	17	17	11	9	12	32

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Mean ratings	3.34	3.72▲	3.41	3.40	2.88▼	3.48	3.49
Base	170	32	27	175	26	46	122



Scale: 1 = a lot worse off, 5 = a lot better off  
▲ ▼ = A significantly higher/lower rating (by group)

Base: N = 202

**Whilst 47% of respondents feel their business is performing a little better/a lot better than 2 years ago, 18% of respondents feel their business is performing a little/a lot worse off.**  
**Medium sized businesses were significantly more positive compared to 2 years ago. Although not significant, Retailers were again below average.**

# Commitment to the Wagga Region



## Recap: What did we learn in Stage 2?

- During the 15 in depth interviews in Stage 2 we spoke with 9 owners/managers of businesses within the Wagga region. Of these 9 businesses, we found 4 had considered moving their business elsewhere in recent years
- Furthermore, of the 9 business owners/managers interviewed, 6 of these also had businesses outside the area – i.e. they are exposed/have ties to other options

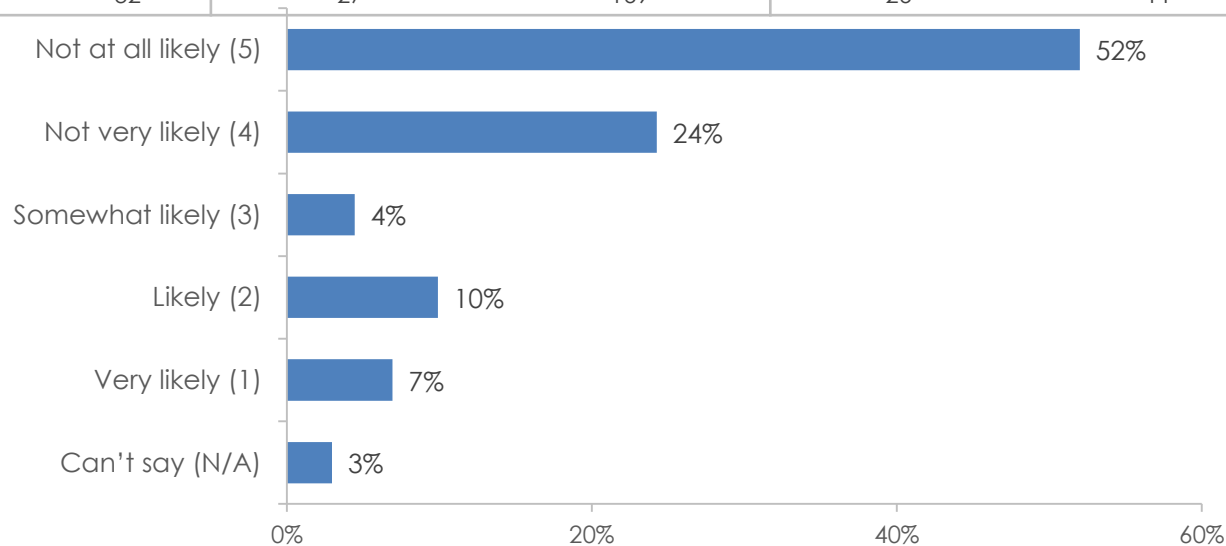
**Stages 3 and 4 sought to explore how committed businesses are to the Wagga region. The following analysis measures the likelihood of businesses closing or relocating their Wagga-based business.**

# Likelihood of Closing/Selling Wagga-based Business

Q4a. In the next two years, how likely, if at all, are you to close or sell your Wagga-based business so you are no longer involved in it?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Mean ratings	4.07	3.71	4.52▲	3.79	4.53▲	4.53▲	3.88	4.00	4.33	3.67	4.00
Base	196	38	27	19	17	15	17	11	9	12	31

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Mean ratings	3.94	4.72▲	4.30	4.03	3.12▼	3.91	4.31▲
Base	164	32	27	169	26	44	118



Scale: 1 = very likely, 5 = not at all likely

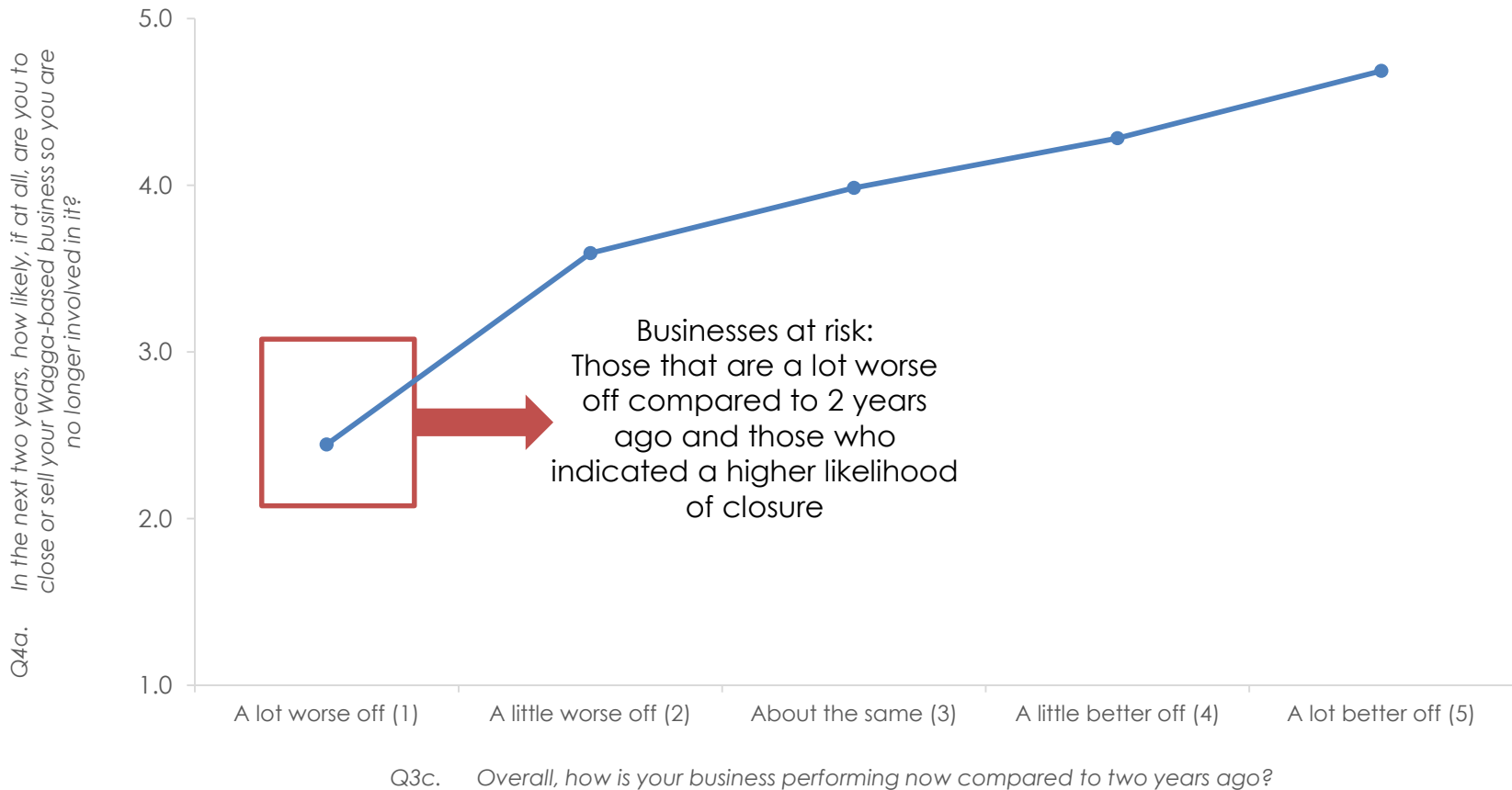
▲▼ = A significantly higher/lower likelihood (by group)

Note: Not at all likely is a positive result

Base: N = 202

**Encouragingly, three quarters of respondents are not very/not at all likely to close or sell their Wagga-based business in the next 2 years. Those from the Health Care and Social Assistance industry, Construction, Education and Training and medium sized businesses reported stronger results (i.e. were significantly less likely to be considering closing/selling their Wagga-based business). In contrast, retailers were somewhat more likely to be considering closing/selling.**

# Business Performance Vs Likelihood of Closing/ Selling Wagga-based Business

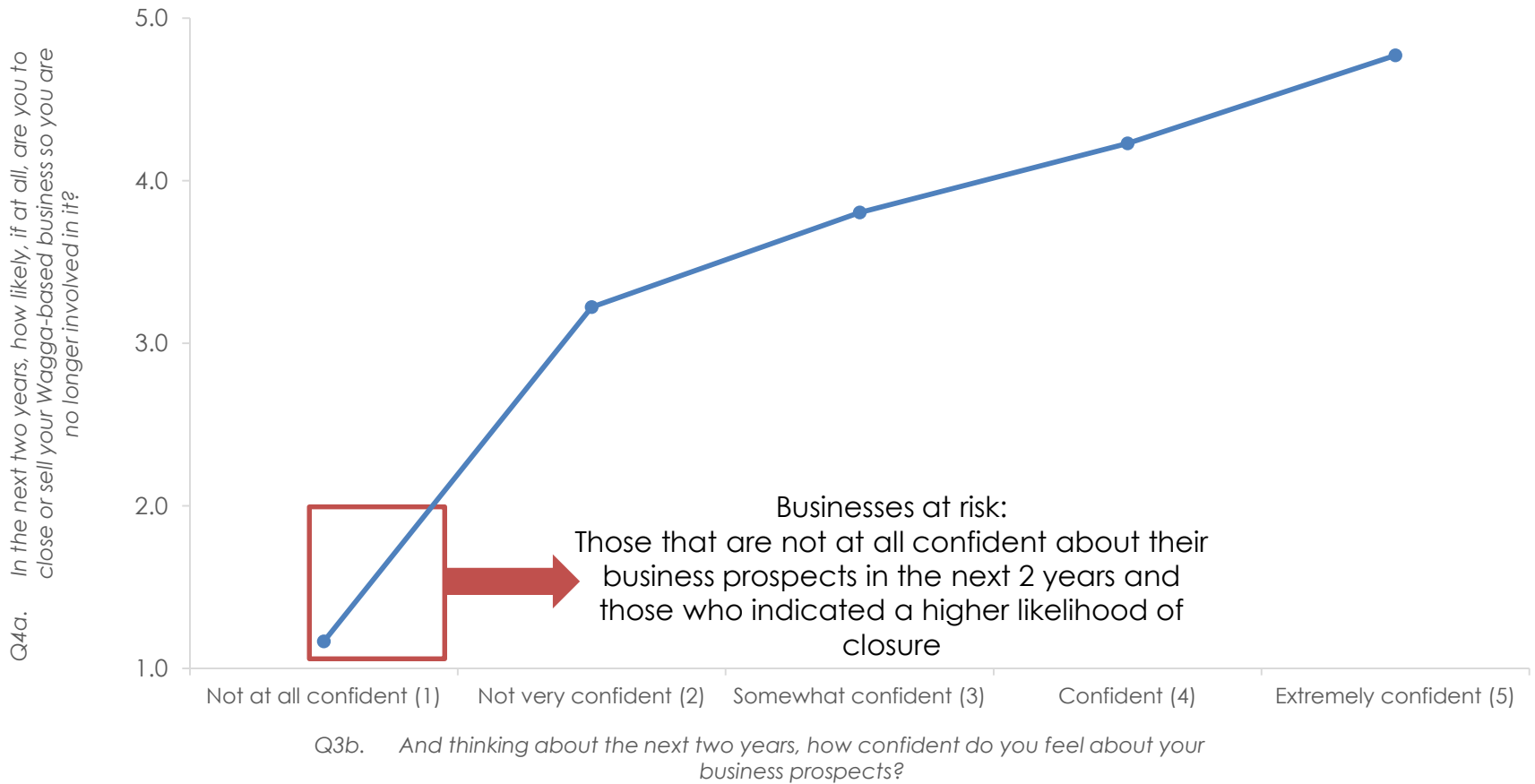


Scale: Likelihood 1 = very likely to close/sell, 5 = not at all likely to close/sell  
Performance 1 = A lot worse off, 5 = A lot better off

When we analyse business performance against likelihood of closing/selling, not surprisingly, we can see a direct correlation between poor recent performance and increased likelihood for closing or selling.



# Business Confidence Vs Likelihood of Closing/ Selling Wagga-based Business



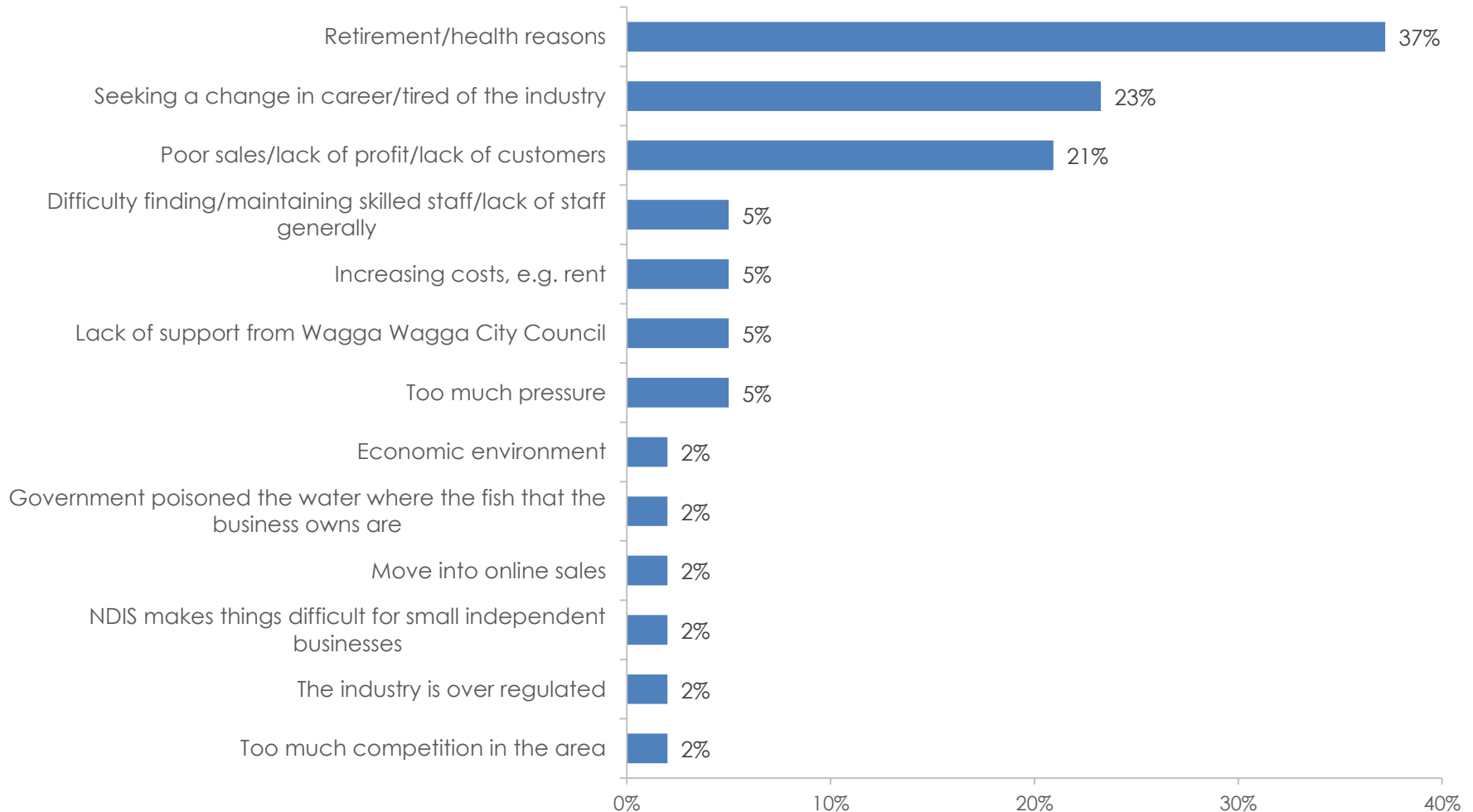
Scale: Likelihood 1 = very likely to close/sell, 5 = not at all likely to close/sell  
Confidence 1 = not at all confident, 5 = extremely confident

Again, by analysing business confidence against the likelihood of closing/selling, we can further see the very strong relationship between business performance and closure.

# Likelihood of Closing/Selling Wagga-based Business



Q4b. May I ask why you are [Q4a] to close or sell your business in the next two years?



Base: Those who are 'somewhat likely', 'likely', or 'very likely' to close their business in the next 2 years. N = 43

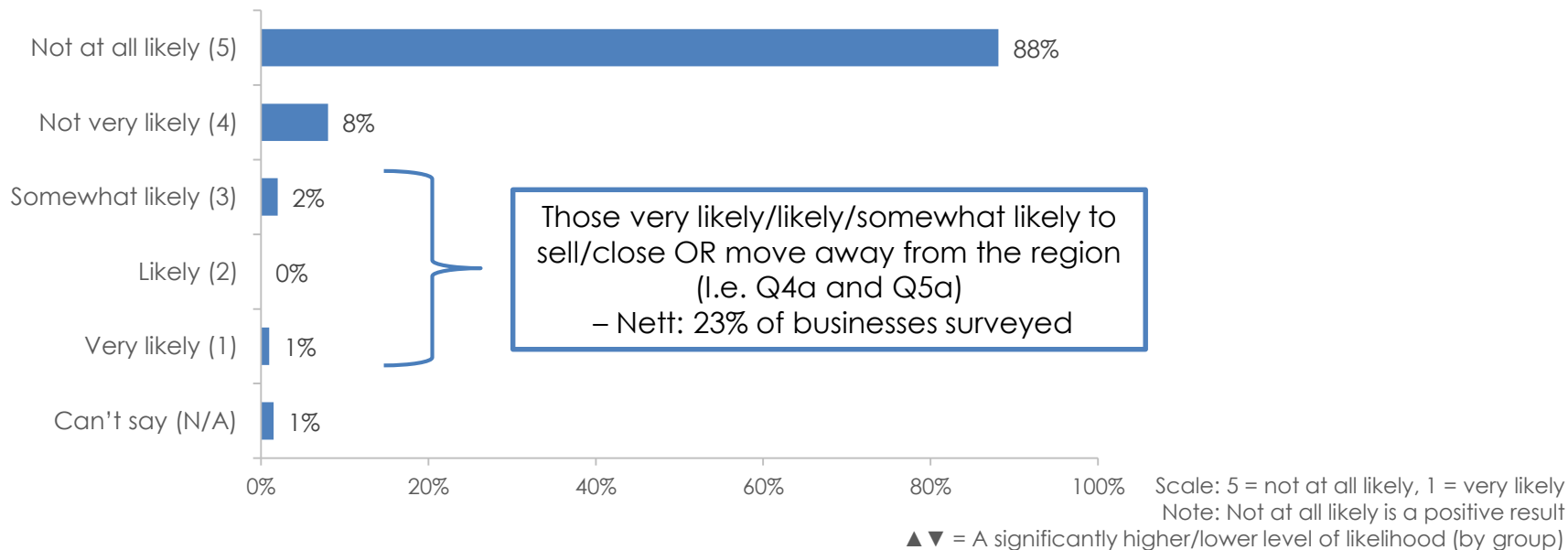
**For the who expressed a likelihood of closing/selling their Wagga-based business in the next 2 years, key reasons were not entirely sales/profit based. Whilst 21% cited 'poor sales/lack of profit/lack of customers' as the reason for closure, a further 37% indicated retirement/health reasons and 23% desired a change in career/industry (nett sub-total of 58%).**

# Likelihood of Moving Business Away From the Region

Q5a. In the next two years, how likely, if at all, are you to move your Wagga-based business away from the region?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Mean ratings	4.84	4.82	4.89	4.80	4.78	4.87	4.88	4.91	5.00	4.92	4.77
Base	199	39	27	20	18	15	17	11	9	12	31

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Mean ratings	4.84	4.88	4.67	4.87	4.46	4.91	4.89
Base	167	32	27	172	26	44	121



Base: N = 202

Likelihood of moving their Wagga-based business away from the region was very low, with only 1% 'very likely' to consider a move and a further 2% 'somewhat likely'.

The results are very comparable across all industry types and business types, reflecting the overall commitment to the top 'Not at all likely' code.

# Likelihood of Moving Wagga-based Business Away From the Region

Q5b. May I ask why you are [Q5a] to move your business away from the region in the next two years?

“Better government assistance (in other areas)”


“Area is slowing down economically”

“Lack of support from Wagga Wagga Council”

“Not easy to do business with Council in this area”

“Planning takes a lot of time”

“Hard approvals process”



**For the few who showed interest in a possible move, key reasons centred on issues experienced regarding business and Council working together.**

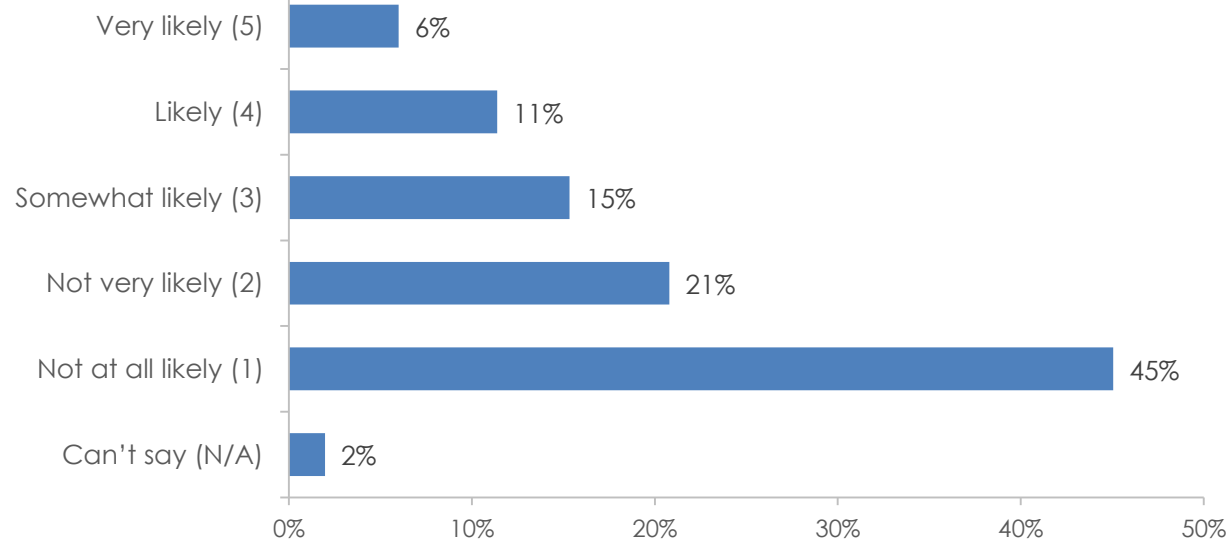


# Likelihood of Expanding Existing Wagga-based Business

Q6. In the next two years, how likely, if at all, are you to expand your existing Wagga-based business into larger or additional premises within the region?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Mean ratings	2.10	2.05	2.23	2.35	2.00	1.80	2.06	1.82	2.78	1.83	2.10
Base	198	39	26	20	18	15	17	11	9	12	31

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Mean ratings	2.01	2.56▲	2.22	2.08	1.48▼	2.22	2.23
Base	166	32	27	171	25	45	120

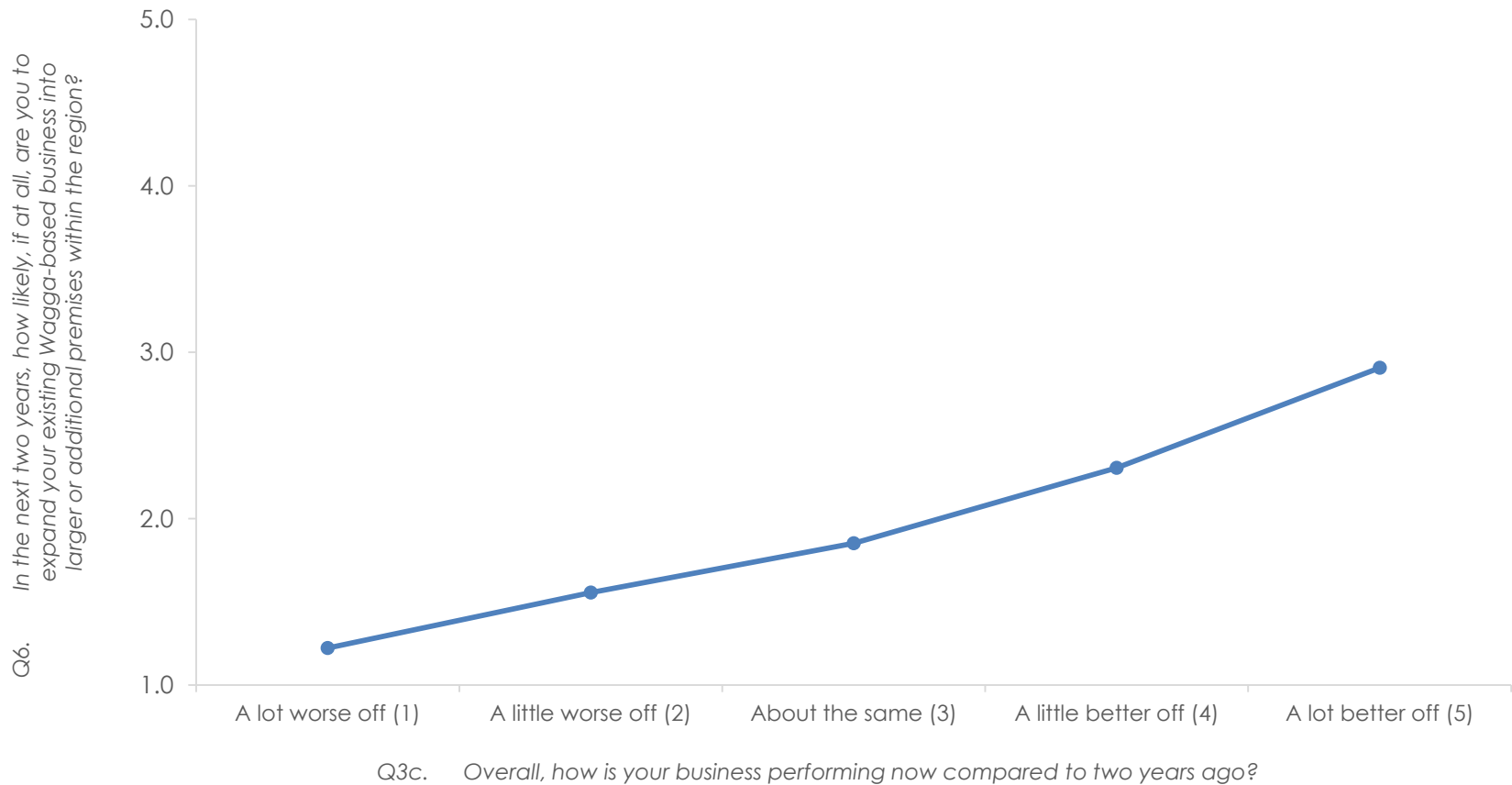


Base: N = 202

Scale: 1 = not at all likely, 5 = very likely  
▲ ▼ = A significantly higher/lower likelihood (by group)

**It is encouraging to see almost one third of respondents are at least somewhat likely to expand their Wagga-based business into larger/additional premises within the region in the next 2 years – although only 6% committed to the top ‘very likely’ code. Those with medium sized businesses were significantly more likely to foresee expansion. And given the generally below average scores for the retail sector on earlier measures, it is encouraging to see they are close to average on this measure.**

# Business Performance Vs Likelihood of Expanding Wagga-based Business



Scale: Likelihood 1 = not at all likely to expand, 5 = very likely to expand

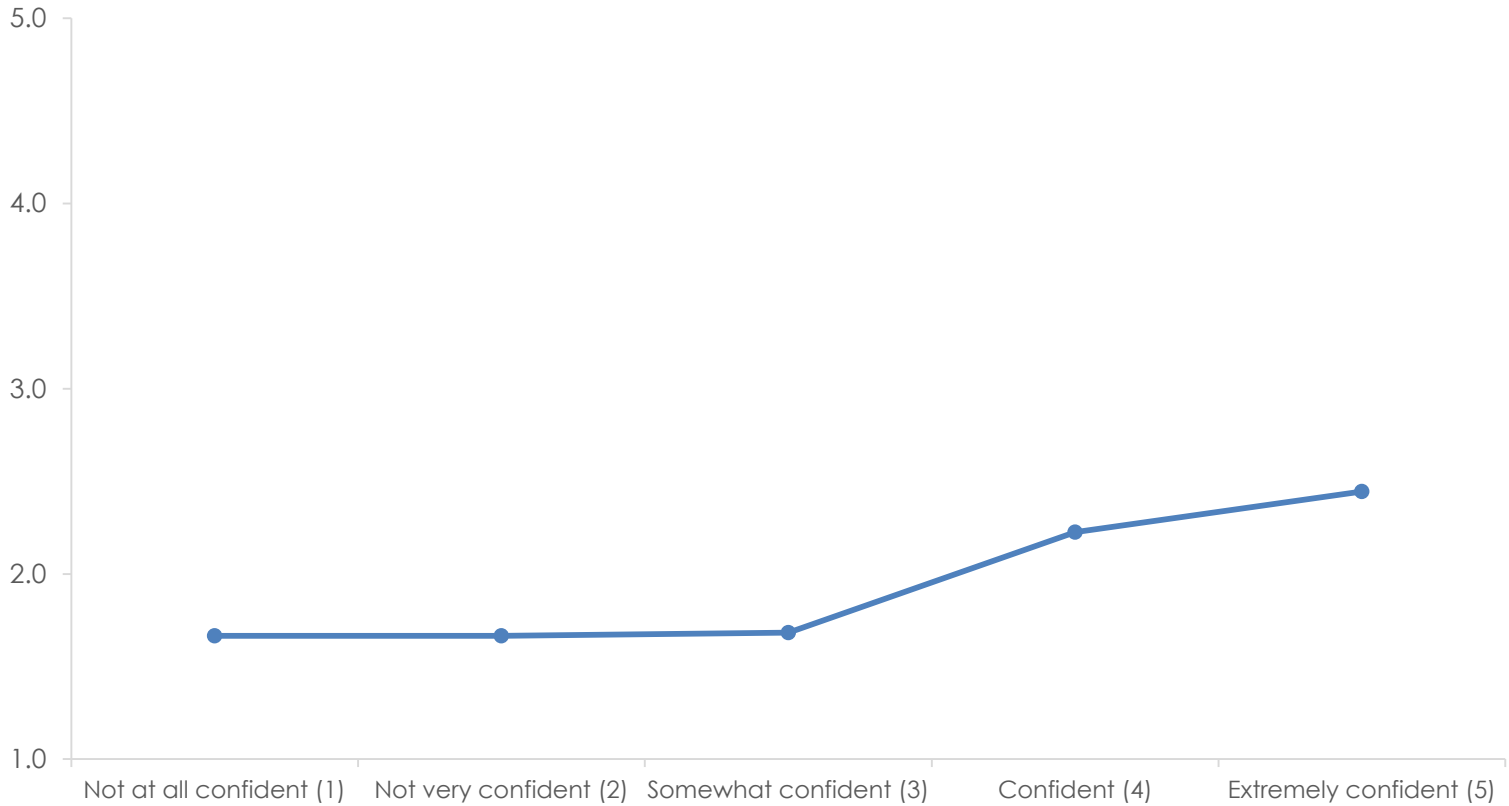
Performance 1 = a lot worse off, 5 = a lot better off

**When we analyse business performance by likelihood to expand, it is evident that those who are performing strongly compared to the previous 2 years are more likely to consider expansion into a larger/additional premises in the area.**

# Business Prospects Vs Likelihood of Expanding Wagga-based Business



Q6. In the next two years, how likely, if at all, are you to expand your existing Wagga-based business into larger or additional premises within the region?



Q3b. And thinking about the next two years, how confident do you feel about your business prospects?

Scale: Likelihood 1 = not at all likely to expand, 5 = very likely to expand  
Confidence 1 = not at all confident, 5 = extremely confident



**Whilst in the chart above the correlation between higher levels of business confidence and increased likelihood of expansion is evident, we can see that this is much more apparent for those very confident in their business prospects.**

# Likelihood of Encouraging Businesses to Move to the Wagga Region



## Recap: What did we learn in Stage 2?

- Whilst business owners/managers in Stage 2 were not completely tied to the region (4 of the 9 had considered moving the business away), overall, respondents were very positive when it came to recommending/encouraging others to move to the area (14 of the 15 would actively encourage)

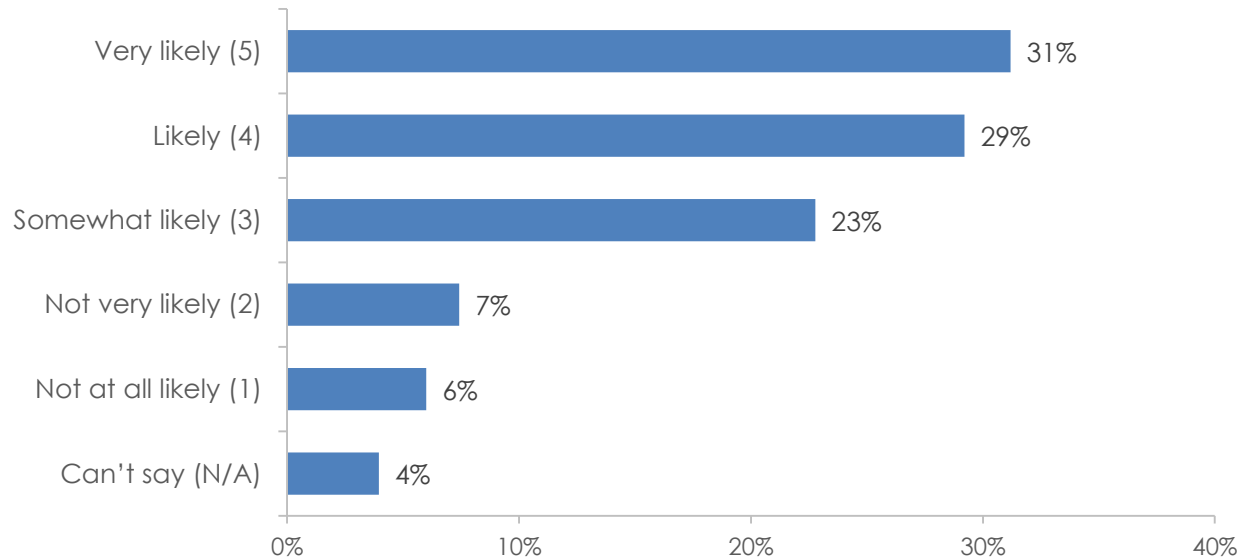
Stages 3/4 sought to further understand business commitment to the region by measuring their likelihood of actively encouraging others to move to the Wagga region.

# Likelihood of Encouraging Businesses to Move to the Wagga Region

Q7a. If you were asked, how likely, if at all, would you be to actively encourage businesses to move to the Wagga region?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Mean ratings	3.76	3.64	4.11	3.55	3.88	3.76	3.80	4.00	3.89	3.33	3.72
Base	194	39	27	20	17	17	15	9	9	12	29

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga
Mean ratings	3.77	3.74	3.81	3.76
Base	163	31	26	168

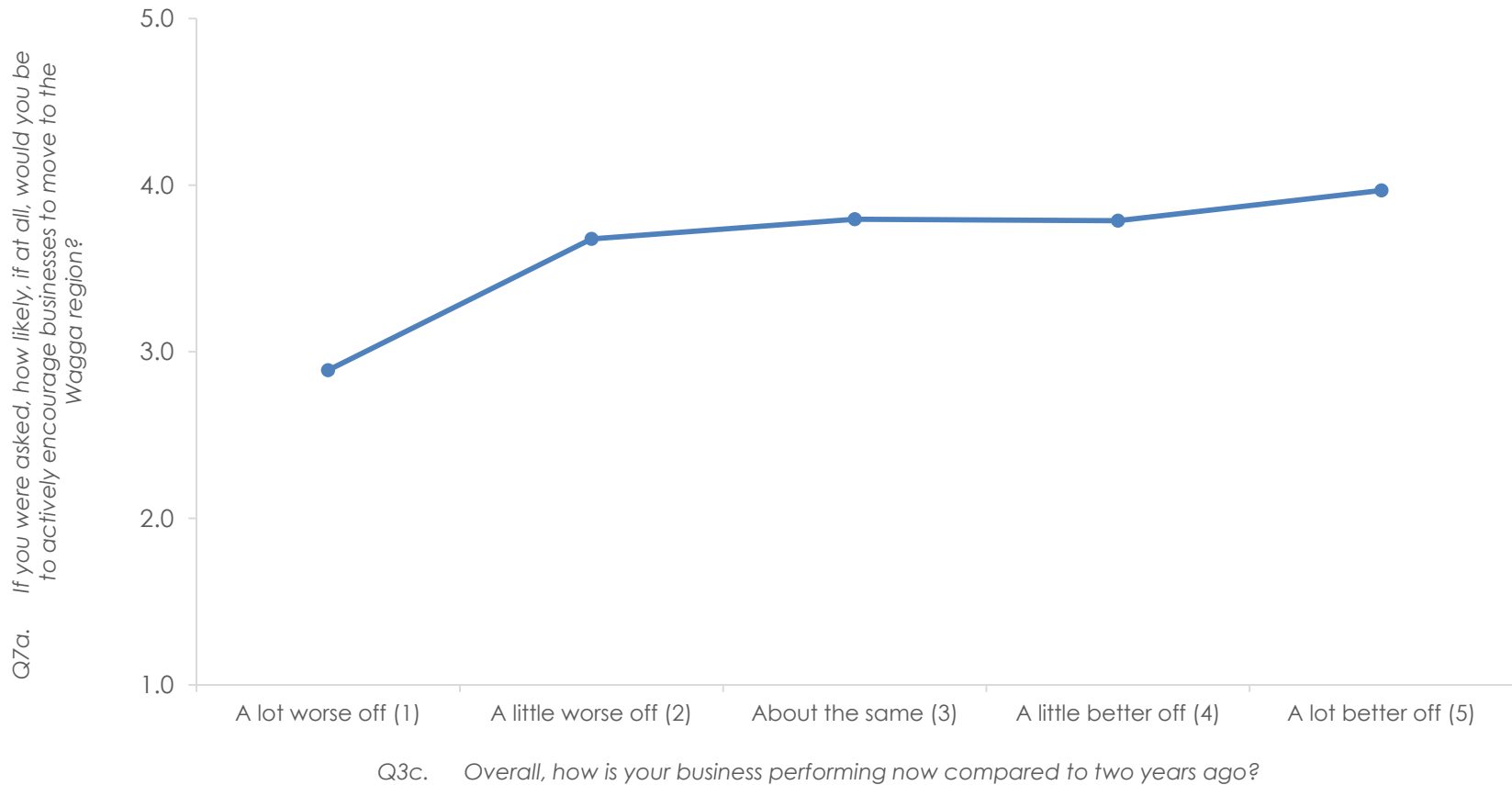


Base: N = 202

Scale: 1 = not at all likely, 5 = very likely

**Likelihood of encouraging businesses to move to the Wagga region was somewhat high, with 60% of respondents saying they were 'likely' or very likely' to recommend. However, this leaves a sizeable minority who are either only 'somewhat likely' (23%) or not likely (13%).**

# Business Performance Vs Likelihood of Encouraging Businesses to Move to the Wagga Region



Scale: Likelihood 1 = not at all likely to encourage, 5 = very likely to encourage

Performance 1 = a lot worse off, 5 = a lot better off

The chart above shows that with the exception of those who are experiencing a significant downturn in business performance (a lot worse off than 2 years ago), all other respondents, regardless of business performance are keen to actively encourage others to move to the Wagga region.

# What Advantages/Benefits Does the Wagga Region Offer Business Owners



## Recap: What did we learn in Stage 1 & 2?

Councillors in Stage 1 of the research program cited the following as the key advantages/benefits for businesses moving to the region:

- Low costs/overheads
- Strong/quality work force
- Access to logistics/transport networks
- Access to raw materials
- Proactive Council
- Quality of life

Respondents in Stage 2 of the research program were asked to think about the reasons industries would benefit by moving/setting up in the Wagga region. Key themes included:

- Affordability – not just for businesses, but residents/families as well
- Room to expand/grow
- Location/proximity to major markets
- Population growth
- Quality of life

Within Stage 2, there was a considerable focus on the 'liveability' of the region and this being such a strong selling point for businesses moving to the area. Stages 3 and 4 sought to go beyond these quality of life responses and focus more on the business advantages of the region.

# Business Advantages/Benefits of the Region



Q7b. Apart from 'liveability' aspects such as work-life balance, housing affordability, etc, what business-specific advantages or benefits, if any, do you believe the Wagga region offers business owners looking to move here?

	N = 194
Centrally located between major cities, Sydney/Melbourne/Canberra/Adelaide	13%
Population in the area is growing	12%
Nett: Lower running costs for business owners	9%
<i>Lower wages for employees</i>	1%
<i>More affordable rent</i>	4%
<i>Generally lower running costs</i>	4%
<i>Materials/supplies costs are lower</i>	1%
Rates	1%
Steady economic growth/strong economy	7%
Ease of travelling in the area, i.e. lack of congestion, easy parking, ease of travelling to work	6%
Wagga Wagga is central and attracts others from outlying areas/Major hub	6%
Education opportunities/university provide well educated/skilled staff in the region	5%
Strong customer/client base in the region	5%
Broad demographic in the area, i.e. families, young skilled workers	4%
Good range of businesses in the area	4%
Nett: Cheaper start-up costs	4%
<i>Cheaper land/premises</i>	4%
<i>More affordable businesses to buy</i>	1%
Access to a diverse market place, i.e. defence, agriculture, health, correctional, tourism	3%
Access to major transport links	3%
Good/convenient access to services/facilities	3%
Strong community support for local businesses	3%
The region offers no other advantages/benefits other than liveability	25%
Don't know/unsure	5%



**Whilst 25% of respondents could not name a benefit aside from the 'liveability' (and a further 5% couldn't provide an answer), 13% cited the centrality of the region, 12% population growth and 9% lower running costs for businesses.**

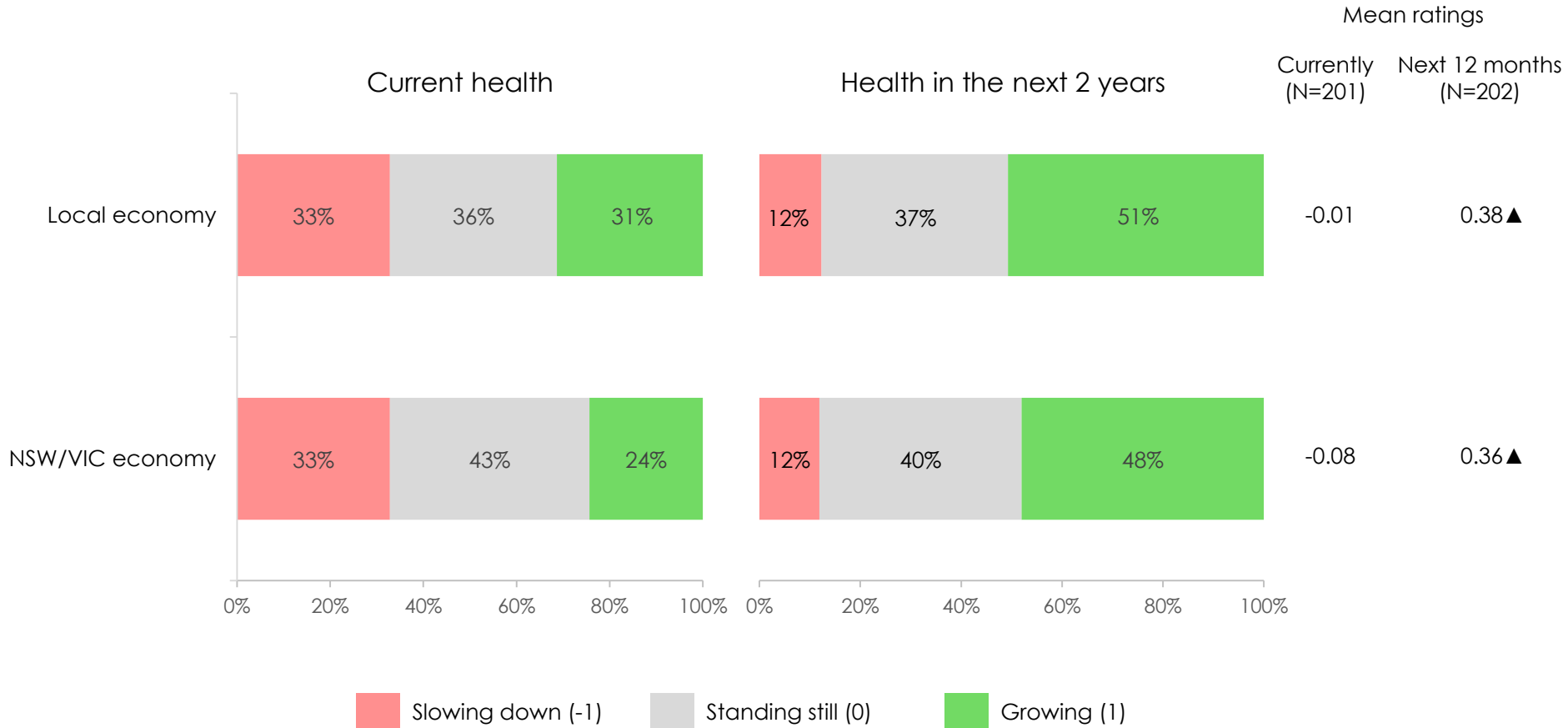


# Health of the Local/State Economies



Q8a. Thinking about the state of the economy, what is your perception of the current health of the Local economy and the broader NSW and Victorian economies?

Q8b. And what is your perception of the health of the local economy and the broader NSW and Victorian economies for the next two years?



Scale: -1 = slowing down, 1 = growing  
 ▲ ▼ = A significantly higher/lower rating

Note: For additional analysis, please see Appendix A

## Two key findings from the above charts are:

- Perceptions of future economic health are more favourable than current economic health.
- Results for the 'local' and 'NSW/VIC' economies are very similar, which may suggest businesses tend to think about economic health at a state rather than local level.

# Challenges Facing the Business



## Recap: What did we learn in Stages 1 & 2?

Councillors in Stage 1 of the research program suggested the region faces the following challenges in progressing Wagga's key industries:

- Support from State/Federal Government – Funding, provision of essential services
- Support for emerging industries
- Implications of population growth
- Weather/rainfall

According to Stakeholders and business owners/managers surveyed in Stage 2, the main perceived challenges included:

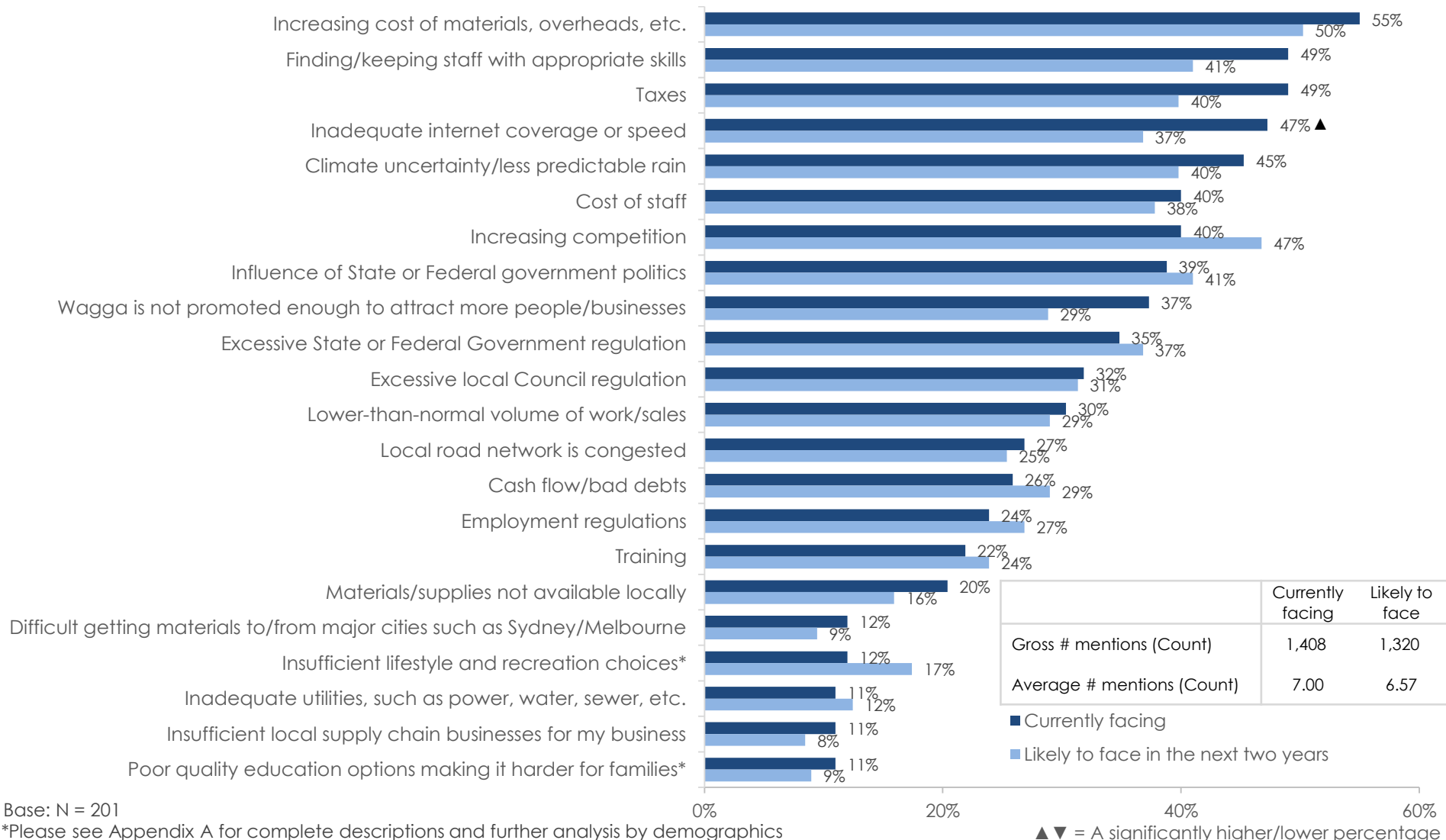
- Council red-tape/regulations
- Access to skilled staff
- Infrastructure/utilities supporting population growth
- Lack of clear/coherent promotion of the area

**Stages 3 and 4 set out to robustly measure current perceived challenges for business, as well as those likely to impact in the next 2 years.**

# Challenges Facing the Business



Q9a/9b. Which, if any, of the following potential challenges is your business currently facing/likely to face in the next 2 years?



Base: N = 201

\*Please see Appendix A for complete descriptions and further analysis by demographics

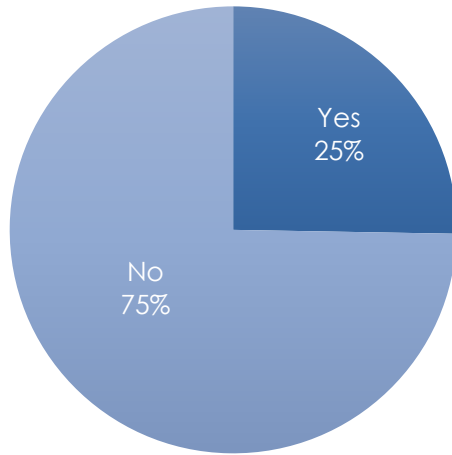
The main challenges businesses are currently facing include; increasing cost of materials (55%), finding/keeping staff with appropriate skills (49%), taxes (49%) and inadequate internet coverage/speed (47%).

Looking forward to the next 2 years, across many areas, respondents see these challenges diminishing. Interestingly, 'increasing competition', is one area respondents see as a growing challenge.

# Other Challenges Facing the Business



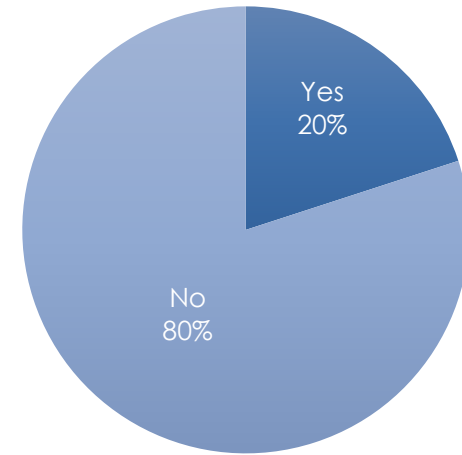
Q9a. Are there any other potential challenges your business is currently facing?



Base: N = 201

Other (Specified)	N=51
Lack of car parking/unmetered car parking	18%
Complying with Council/Government regulations/red tape	14%
Drought	10%
Competition from online businesses	8%
Skilled labour/quality staff shortage	8%
Lack of support from Council	6%
Rising costs, i.e. utilities	6%
State and Federal elections	4%

Q9b. Are there any other potential challenges your business likely to face in the next 2 years?



Base: N = 202

Other (specified)	N=40
Skilled labour shortage/lack of quality of staff	18%
Competition/impact of online businesses	10%
Drought	10%
Laws/regulations/red tape impacting on business	10%
Rising costs, i.e. utilities, raw materials	8%
Federal politics/decision making	5%
Loss of sales/customers	5%

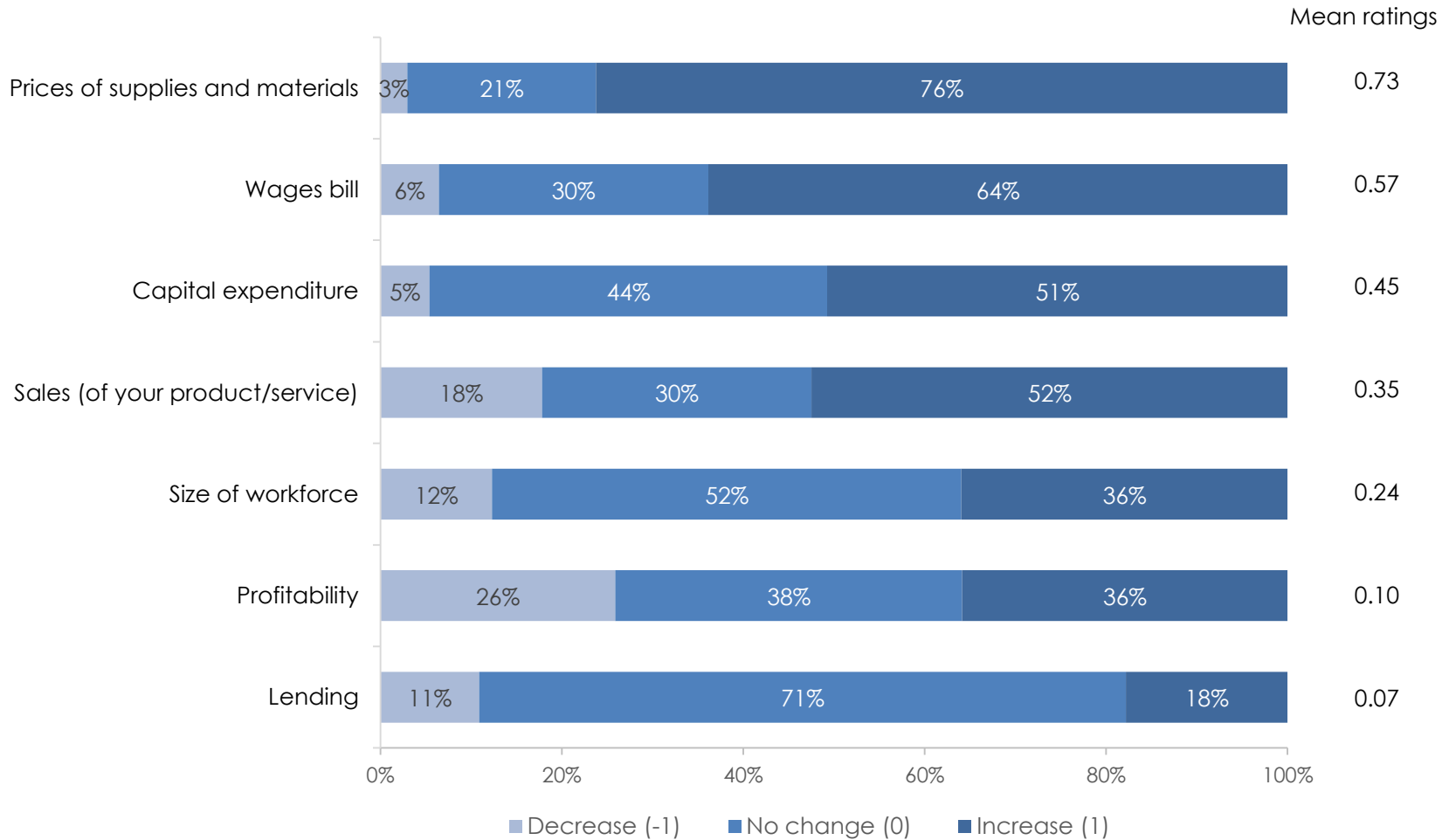
\*Please see Appendix A for complete list of other current/potential challenges

**For those who indicated other challenges currently face their business, 18% suggested a lack of car parking/unmetered parking was a concern.**

# Business Performance



Q10a. Thinking about your business's performance over the last two years, have you experienced an increase, decrease or no change in the following?



Base: N = 202

Please see Appendix A for further analysis by demographics

Scale: -1 = decrease, 1 = increase

**For the price of supplies/materials, wages and capital expenditure, overall, at least 50% of respondents have seen an increase in these expenses. 52% of respondents reported an increase in sales, while 36% indicated an increase in profitability.**

**Analysis by business type showed those from the Health Care and Social Assistance and Education and Training industries were significantly more likely to have reported an increase in the size of workforce over the last 2 years.**

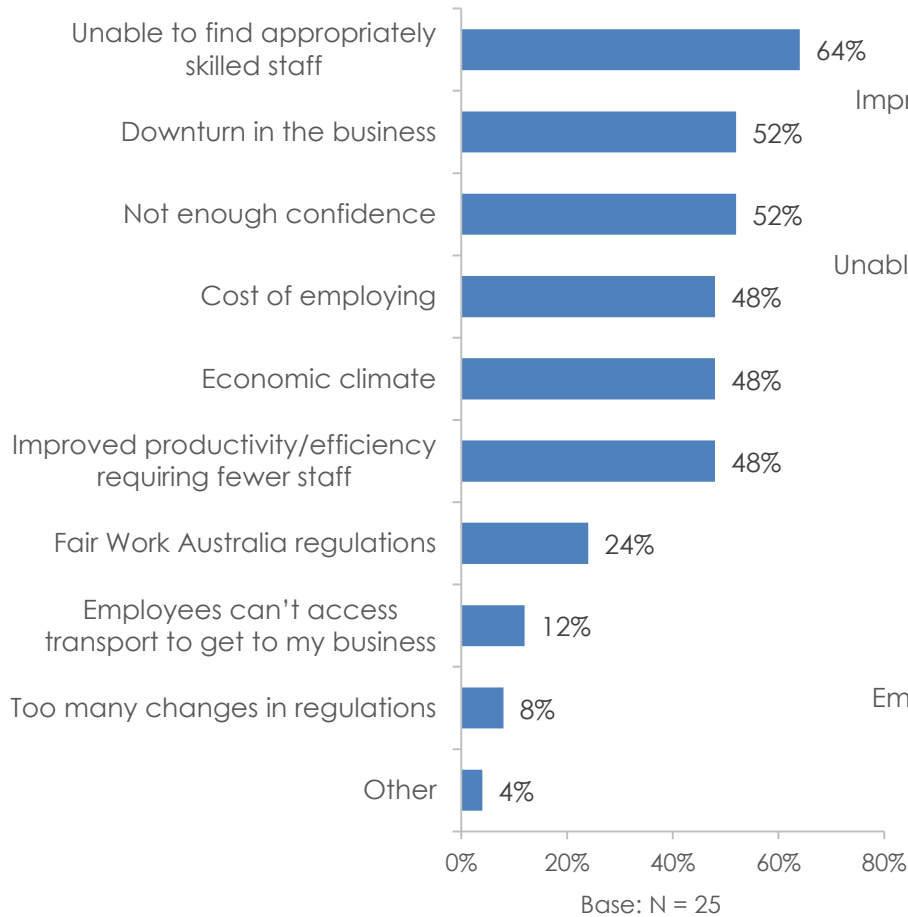
# Business Performance – Size of Workforce



Q10b. [If 'Decrease' for Size of Workforce on Q10a] Which, if any, of the following explain why you have fewer staff now than two years ago?

Q10c. [If 'No Change' for Size of Workforce on Q10a] Which, if any, of the following explain why you have not increased your overall staff levels over the past two years?

## Decrease



## No change



**For those that had fewer staff than 2 years ago, key reasons included; an inability to find appropriately skilled staff, a downturn in business/the economy, the costs involved as well as improved productivity/efficiencies.**

**For businesses who had retained a similar sized workforce, key reasons centred on no need for additional staff.**

# Stages 3 and 4: Online Vs Telephone Results



Project  
Background

Recap:  
Stages 1 & 2

Key Insights:  
Stages 3 & 4

Telephone  
Interview  
Results

**Online  
Vs  
Telephone  
Results**



# Sample Profile



Project  
Background

Recap:  
Stages 1 & 2

Key Insights:  
Stages 3 & 4

Telephone  
Interview  
Results

**Online  
Vs  
Telephone  
Results**





# Sample Profile – Online

## Business industry



Other white collar  
28%



Other blue collar  
17%



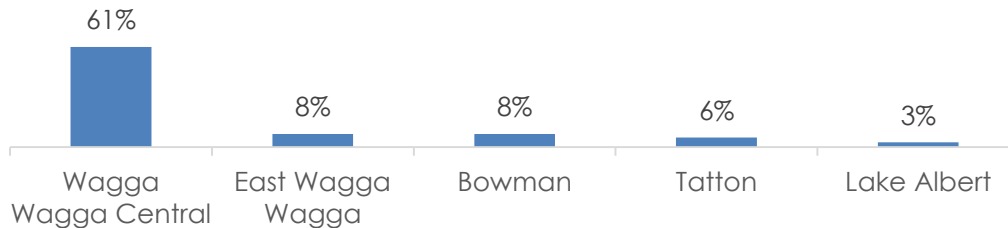
Construction  
11%



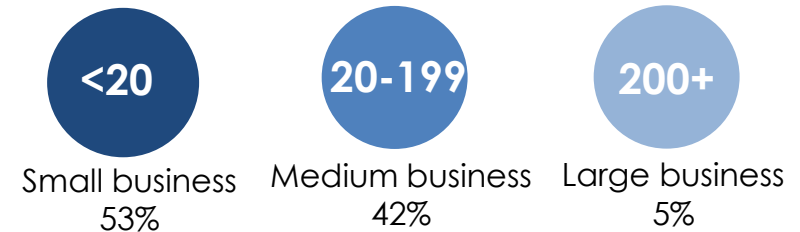
Manufacturing  
11%

**N=36**  
**Wagga Wagga**  
**Businesses**  
**Completed the**  
**Online Survey**

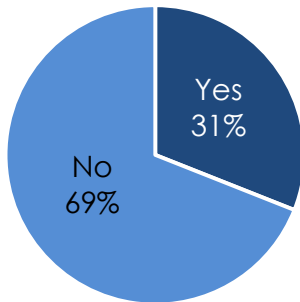
## Business location



## Size of business

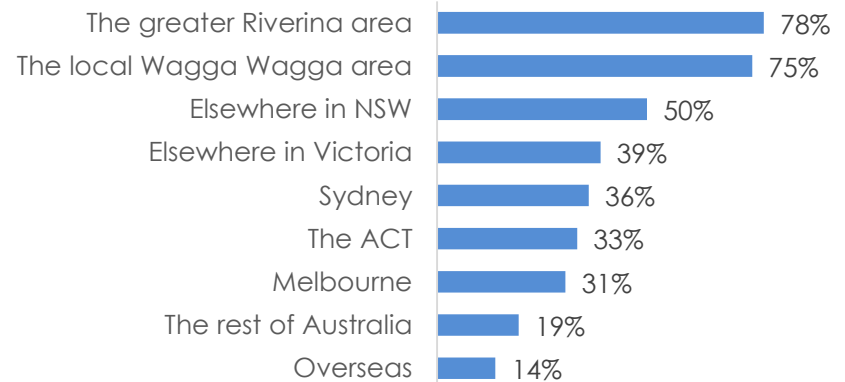


## Own/Manage another business outside the Wagga region



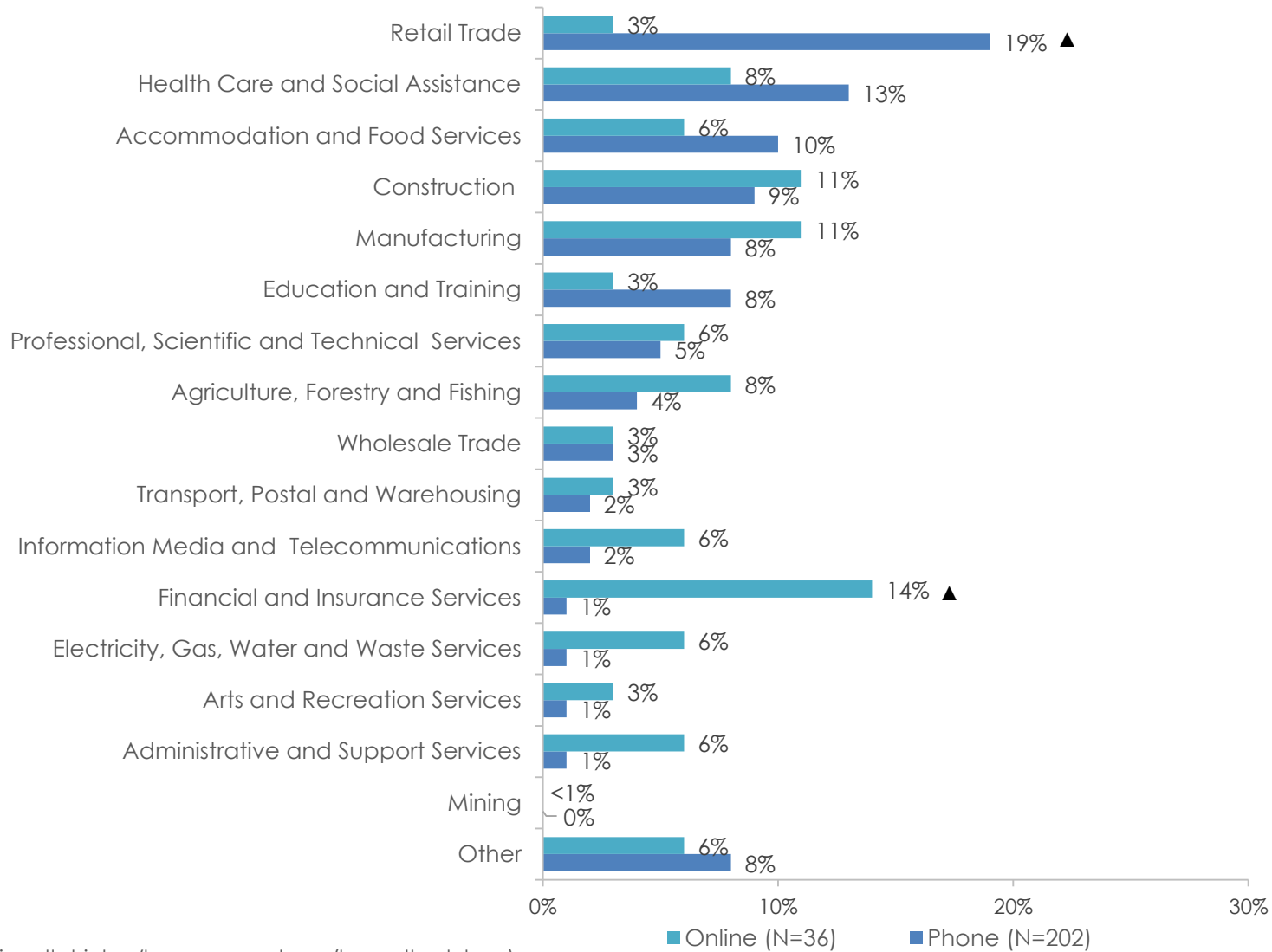
Note: For complete demographic profile, please see Appendix B

## Areas serviced



The online survey was available for completion between 7<sup>th</sup> – 31<sup>st</sup> May 2019.

# Sample Profile – Online Vs Phone Industry Type



The chart above compares the distribution of online and phone respondents by industry sector. The online sample showed a higher proportion of white collar workers, specifically those from the Financial and Insurance Services industry.

# Detailed Results



Project  
Background

Recap:  
Stages 1 & 2

Key Insights:  
Stages 3 & 4

Telephone  
Interview  
Results

**Online  
Vs  
Telephone  
Results**

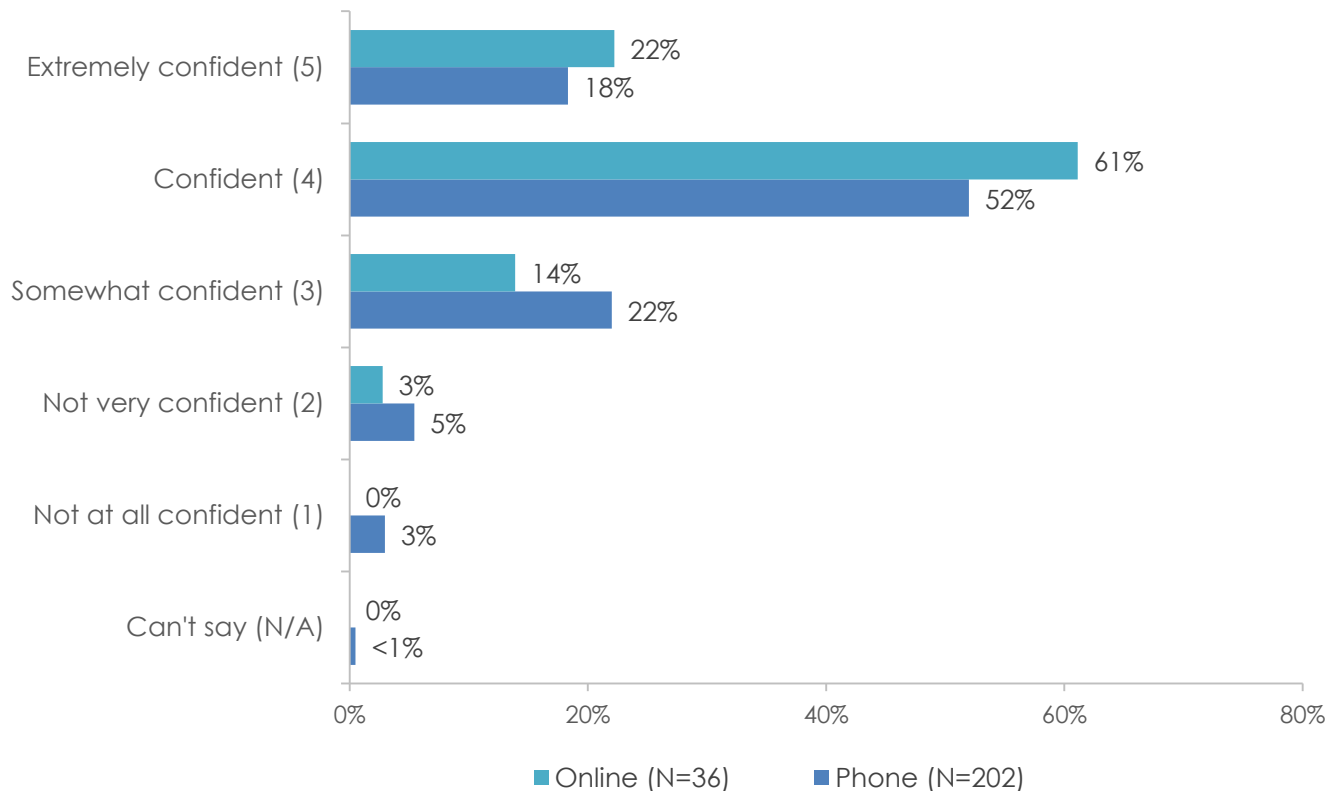


# Business Confidence Over the Past Two Years



Q3a. Over the past two years, how confident have you been about your business prospects?

	Online	Phone
Mean ratings	4.03	3.78
Base	36	201



Scale: 1 = not at all confident, 5 = extremely confident

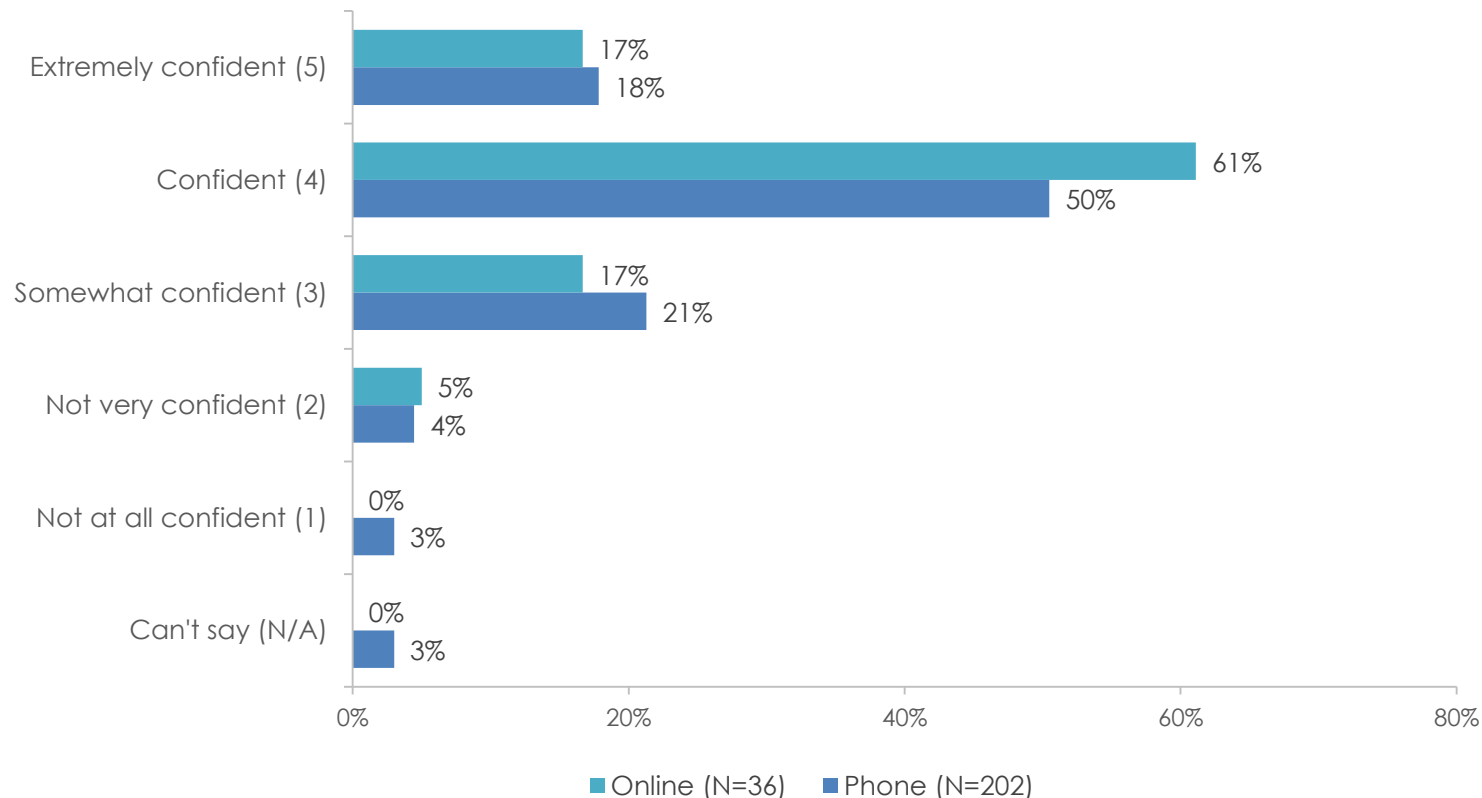
**Whilst not significant, online respondents expressed a higher level of confidence about business prospects over the past 2 years.**

# Business Prospects in the Next Two Years



Q3b. And thinking about the next two years, how confident do you feel about your business prospects?

	Online	Phone
Mean ratings	3.89	3.78
Base	36	196



Scale: 1 = not at all confident, 5 = extremely confident

**95% of online respondents are at least somewhat confident with their business prospects in the next 2 years.**

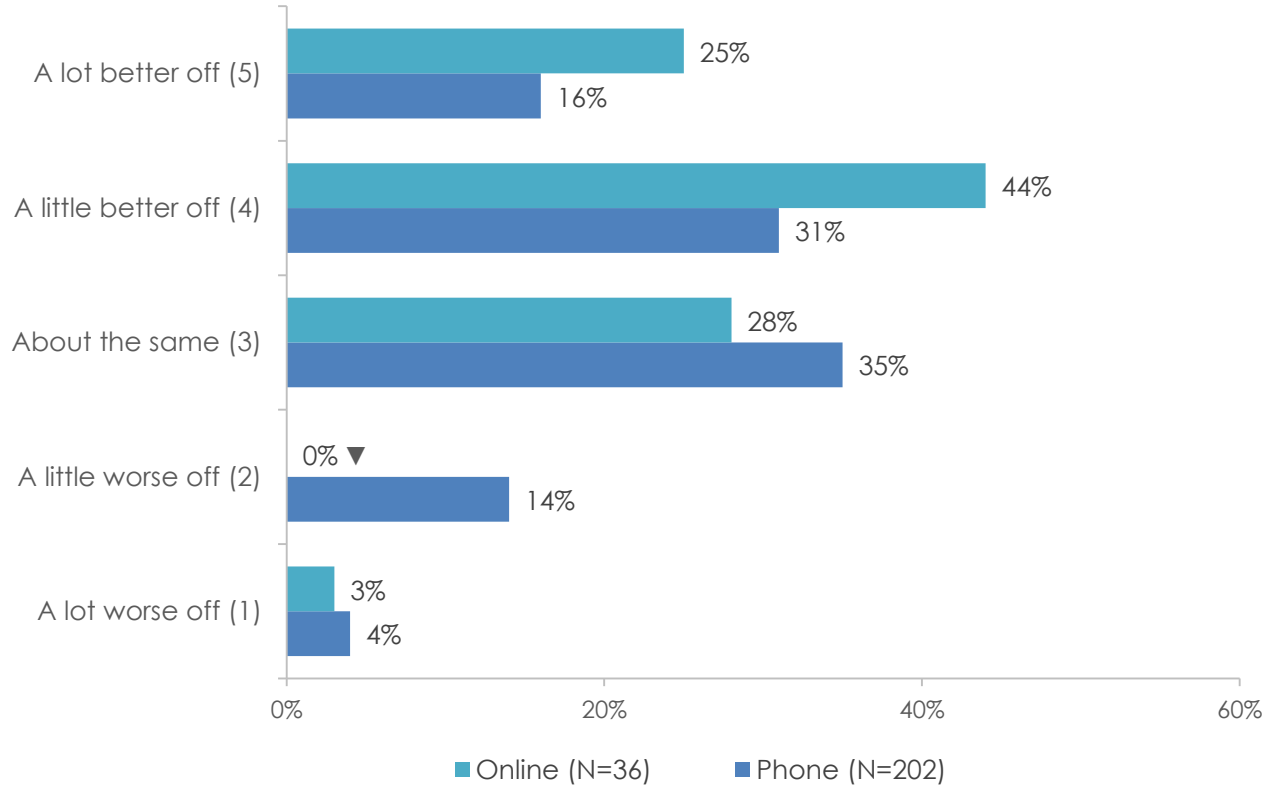
**Whilst not significant, online respondents were more confident with their business prospects than those interviewed by phone.**

# Business Performance Compared to Two Years Ago



Q3c. Overall, how is your business performing now compared to two years ago?

	Online	Phone
Mean ratings	3.89▲	3.40
Base	36	202



Scale: 1 = a lot worse off, 5 = a lot better off  
 ▲ ▼ = A significantly higher/lower rating/percentage (by methodology)

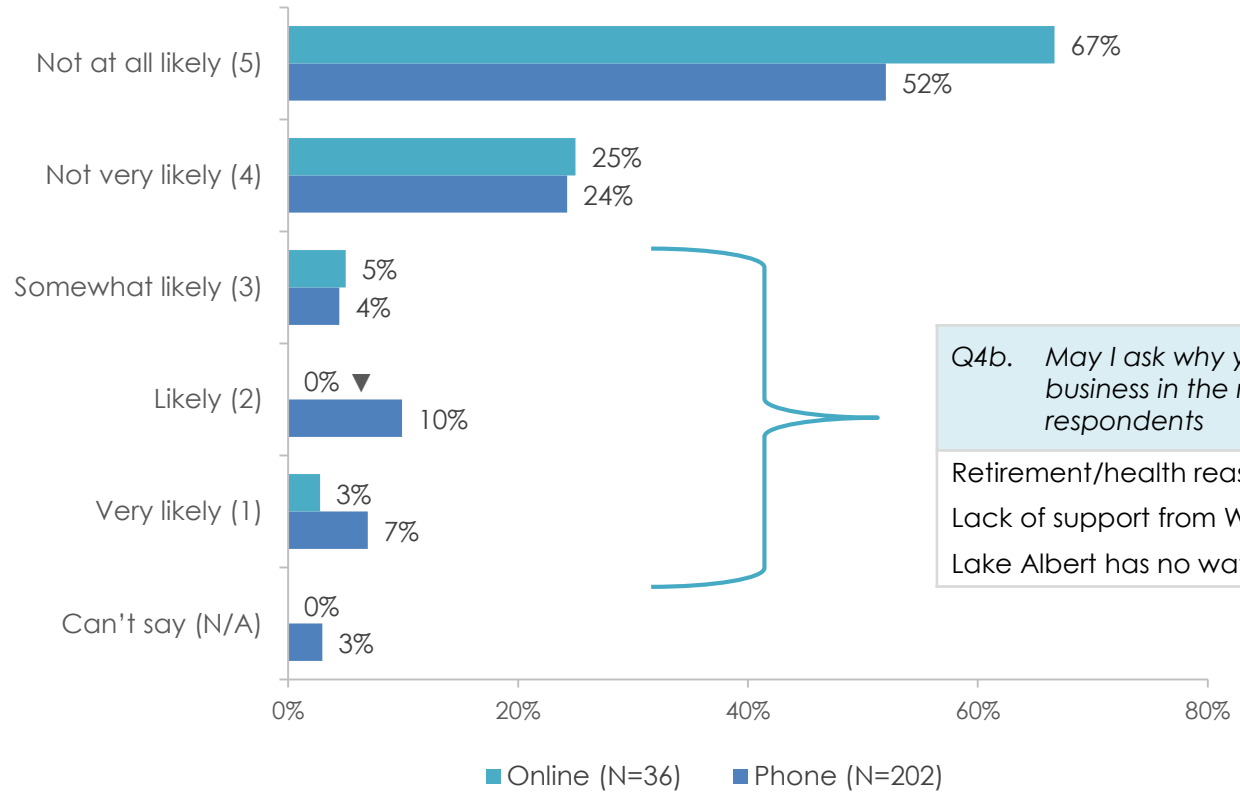
**Online respondents are significantly more positive with regards to their business performance compared to 2 years ago. Two thirds of respondents believe their business is performing a lot better/a little better compared to 2 years ago.**

# Likelihood of Closing Wagga-based Business



Q4a. In the next two years, how likely, if at all, are you to close or sell your Wagga-based business so you are no longer involved in it?

	Online	Phone
Mean ratings	4.53▲	4.07
Base	36	196



Q4b. May I ask why you are [Q4a] to close or sell your business in the next two years? – Online respondents	Count
Retirement/health reasons	2
Lack of support from Wagga Wagga City Council	1
Lake Albert has no water	1

Scale: 1 = very likely, 5 = not at all likely  
 Note: Not at all likely is a positive result

▲▼ = A significantly higher/lower rating/percentage (by methodology)

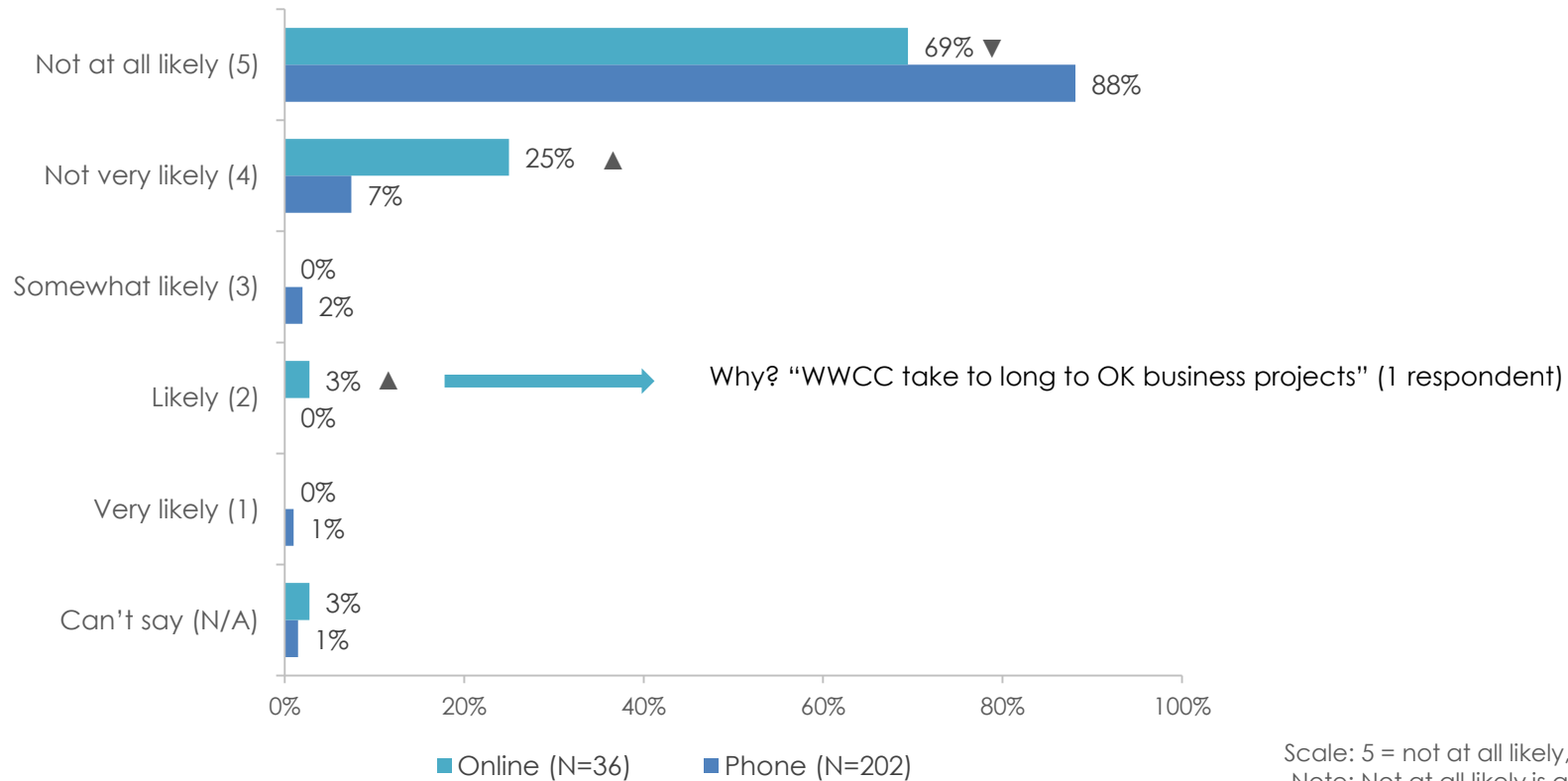


**Likelihood of closing/selling their Wagga-based business is very low.**  
**Online respondents are significantly less likely than the phone sample to foresee closing or selling their business.**

# Likelihood of Moving Business Away From the Region

Q5a. In the next two years, how likely, if at all, are you to move your Wagga-based business away from the region?

	Online	Phone
Mean ratings	4.66	4.84
Base	35	199



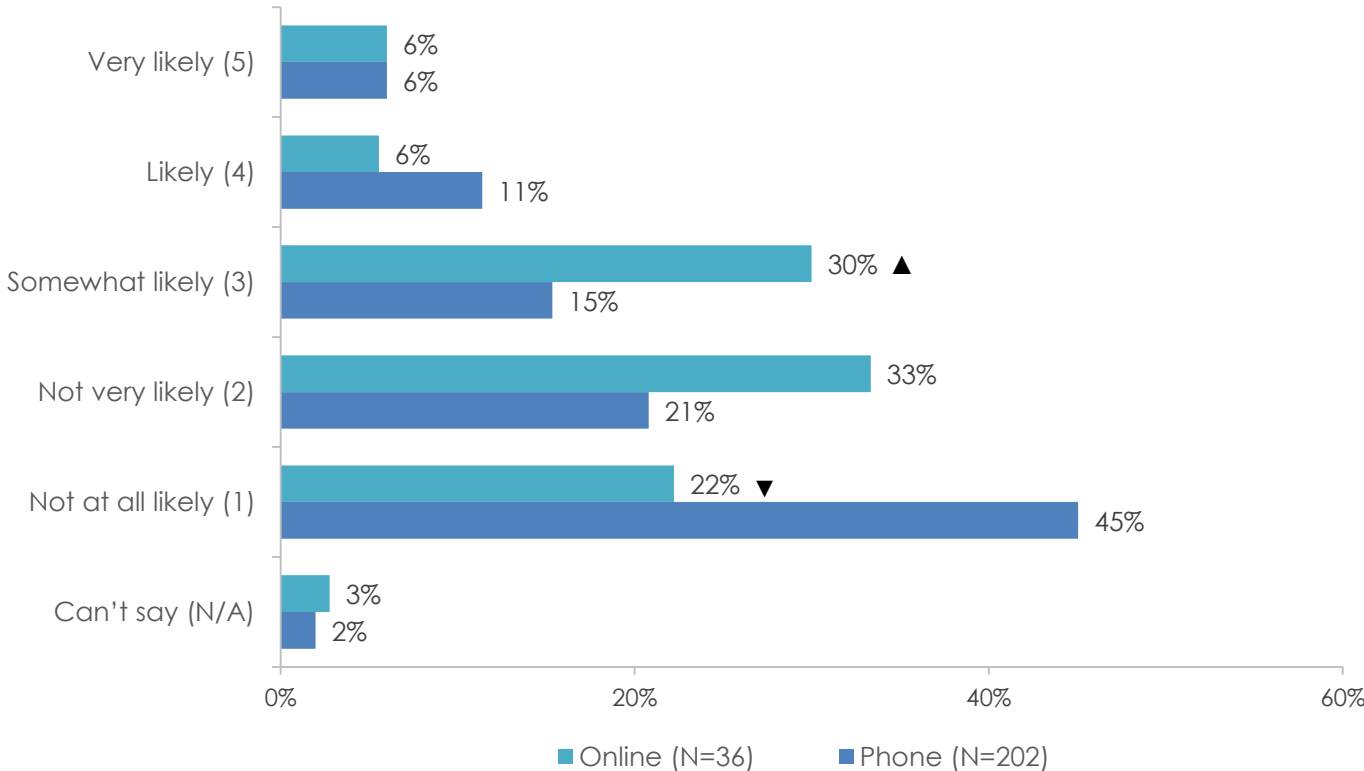
Likelihood of moving their Wagga based business away from the region is very low.



# Likelihood of Expanding Existing Wagga-based Business

Q6. In the next two years, how likely, if at all, are you to expand your existing Wagga-based business into larger or additional premises within the region?

	Online	Phone
Mean ratings	2.37	2.10
Base	35	198



Scale: 1 = not at all likely, 5 = very likely

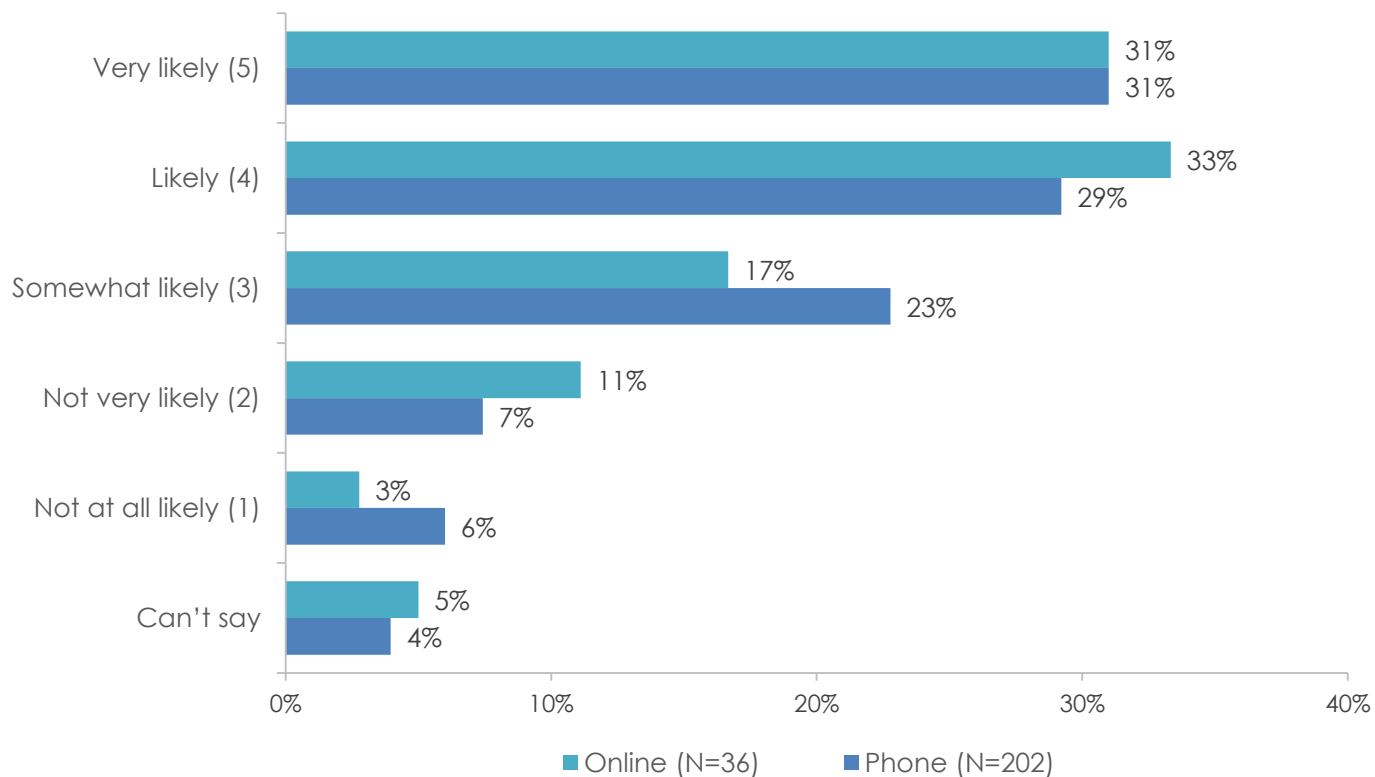
▲ ▼ = A significantly higher/lower percentage (by methodology)

**Online respondents are marginally more likely to expand their existing Wagga-based business, with 12% likely/very likely.**

# Likelihood of Encouraging Businesses to Move to the Wagga Region

Q7a. If you were asked, how likely, if at all, would you be to actively encourage businesses to move to the Wagga region?

	Online	Phone
Mean ratings	3.82	3.76
Base	34	194



Scale: 1 = not at all likely, 5 = very likely

**81% of online respondents are at least somewhat likely to actively encourage businesses to move to the Wagga region.**

**The online results were on a par with the phone sample results.**

# Advantages/Benefits the Region Offers



Q7b. Apart from 'liveability' aspects such as work-life balance, housing affordability, etc, what business-specific advantages or benefits, if any, do you believe the Wagga region offers business owners looking to move here?

Top responses - Online	N=34
Centrally located between major cities, Sydney/Melbourne/Canberra/Adelaide	44%
Lower running costs for business owners	24%
Access to major transport links	21%
Access to a diverse market place	15%
Current/future growth opportunities	15%
Steady economic growth/strong economy	15%

Top responses - Phone	N = 194
Centrally located between major cities, Sydney/Melbourne/Canberra/Adelaide	13%
Population in the area is growing	12%
Lower running costs for business owners	9%
Steady economic growth/strong economy	7%
Ease of travelling in the area	6%

**Comparisons by survey method show the centrality of the Wagga region to be the top responses for both online and phone respondents. Other similarities include 'lower running costs' and 'growth opportunities'.**

# Advantages/Benefits the Region Offers



Q7b. Apart from 'liveability' aspects such as work-life balance, housing affordability, etc, what business-specific advantages or benefits, if any, do you believe the Wagga region offers business owners looking to move here? – Online

Online	N=34
Centrally located between major cities, Sydney/Melbourne/Canberra/Adelaide	44%
Nett: Lower running costs for business owners	24%
<i>Rent</i>	12%
<i>Generally lower running costs</i>	9%
<i>Utilities</i>	3%
Access to major transport links	21%
Access to a diverse market place, i.e. defence, agriculture, health, correctional, tourism	15%
Current/future growth opportunities, e.g. industrial zones, rail hub, aviation development	15%
Steady economic growth/strong economy	15%
Access to information/mentoring/networking in the region, i.e. Wagga Business Chamber, BEC, RDA Riverina, Women in Business	12%
Access to large pool/good quality/reliable employees	12%
Education opportunities/university provide well educated/skilled staff in the region	12%
Nett: Cheaper start up costs	9%
<i>Cheaper land/premises</i>	9%
<i>Construction costs</i>	3%
Access to reliable water supply	6%
Availability of property/land	6%
Better staff morale due to location, ease of travel, flexibility	6%
Good location	6%
Plenty of employment opportunities	6%
Support from Council and levels of government	6%
Access to farmers/agricultural hub/rural industries	3%
Ease of travelling in the area, i.e. lack of congestion, easy parking, ease of travelling to work	3%
Good range of businesses in the area	3%
Good/convenient access to services/facilities	3%
Government departments, including Wagga Council are too tightly bound to the strict application to Council laws. There is always a commercial portion in any changes and to be successful in a move, both sides may need to be more flexible. I choose to live in Wagga, and want Wagga to grow	3%
It is no different to operating anywhere else in the world	3%
Population in the area is growing	3%
Potential to become a Smart Regional City in accordance with global criteria and trends	3%
Proximity to raw materials	3%
Reliable power supply	3%
Strong customer/client base in the region	3%
Strong government funding/initiatives/facilities/employment in the region	3%
The region offers no other advantages/benefits	3%
There is plenty of space for more businesses/expansion	3%
Wagga Wagga is central and attracts others from outlying areas/Major hub	3%
Don't know/unsure	3%

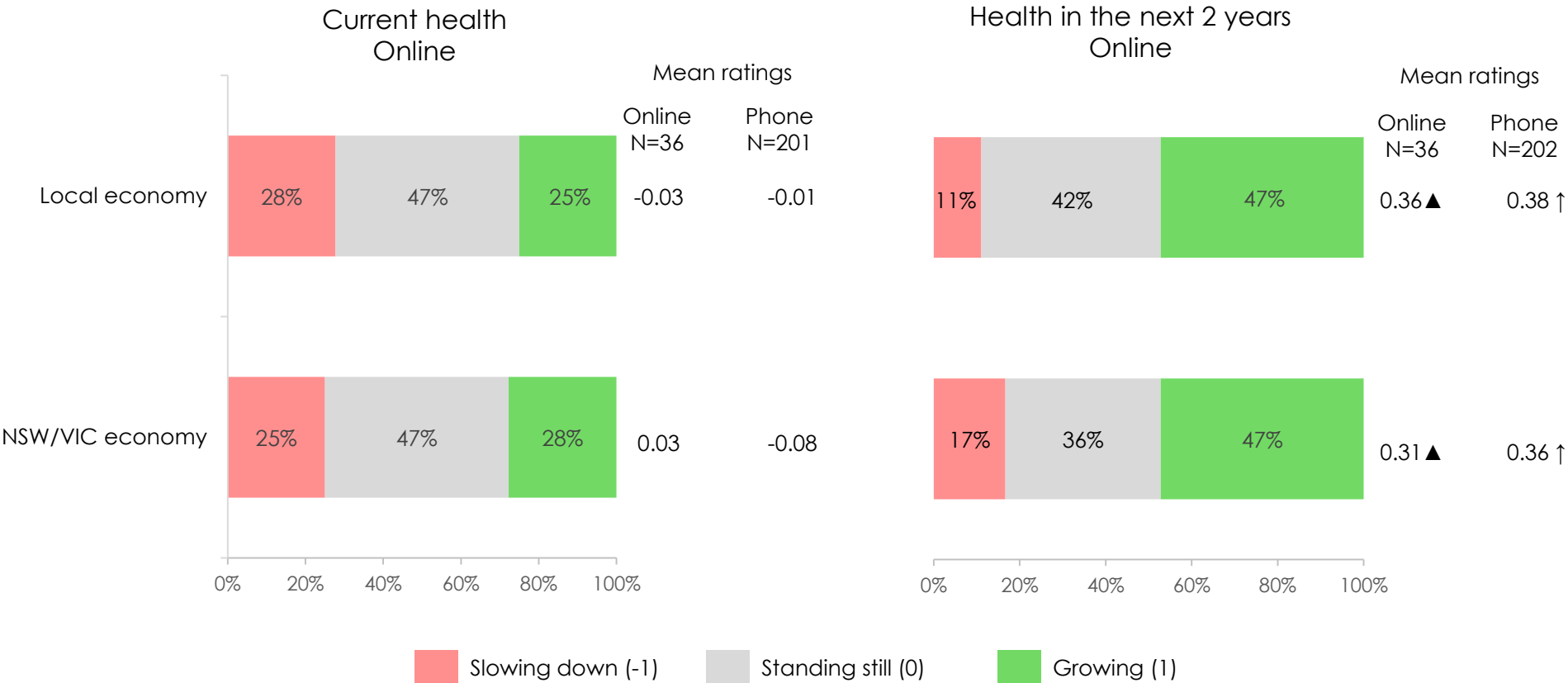
For online respondents the key business specific advantages the area affords, include; centrality of location, access to major transport links, lower running costs and access to diverse markets.

# Health of the Local/State Economies



Q8a. Thinking about the state of the economy, what is your perception of the current health of the Local economy and the broader NSW and Victorian economies?

Q8b. And what is your perception of the health of the local economy and the broader NSW and Victorian economies for the next two years?



▲▼ = A significantly higher/lower rating (online current health compared to next 2 years)

↑↓ = A significantly higher/lower rating (phone current health compared to next 2 years)

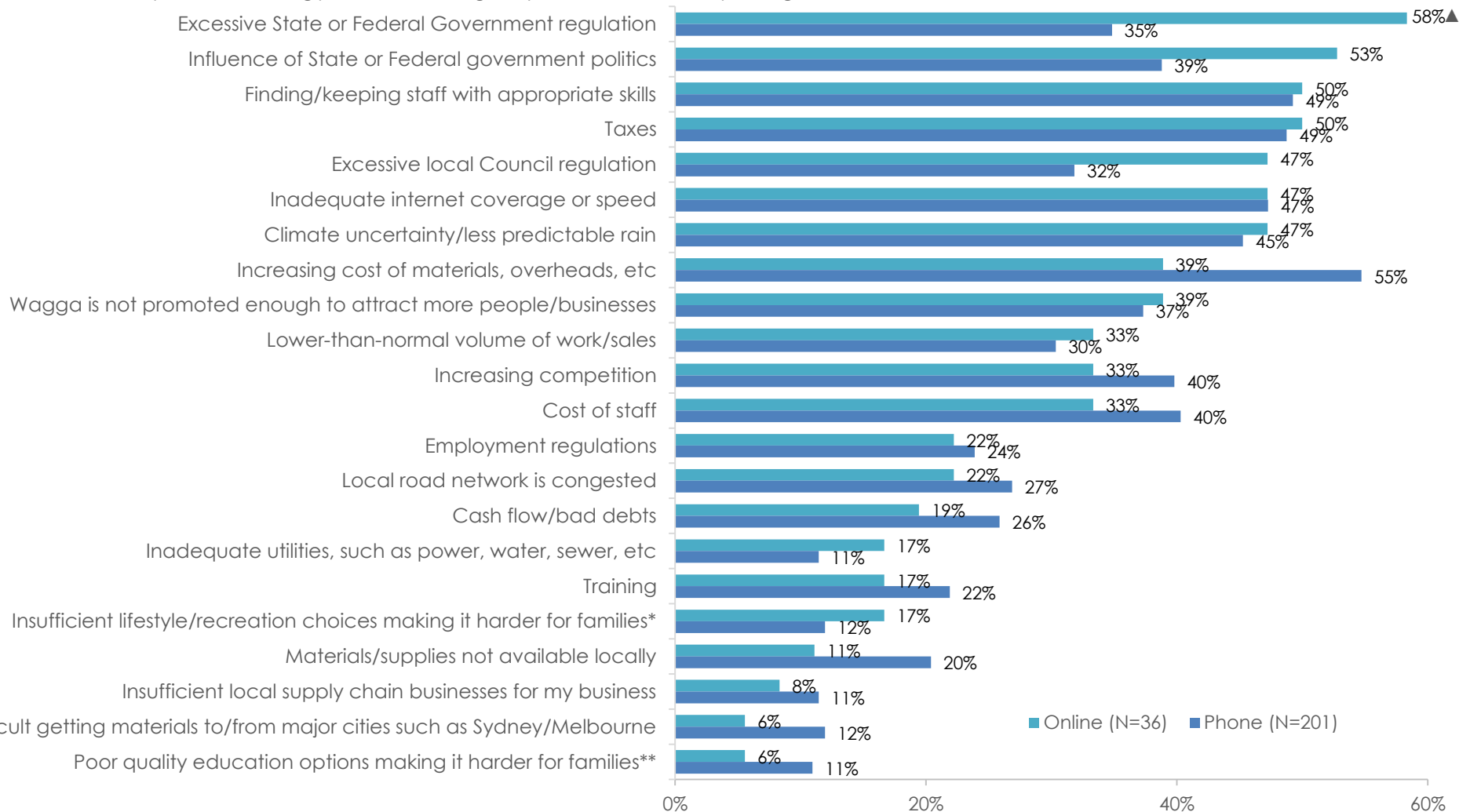
Scale: -1 = slowing down, 1 = growing

Similar to the phone sample, online respondents' current perception of both the local and broader NSW and VIC economies was not particularly strong. Again, similar to the phone sample online respondents were more positive about the health of the economies in the coming 2 years.

# Challenges Currently Facing the Business



Q9a. Which, if any, of the following potential challenges is your business currently facing?



\*Insufficient lifestyle and recreation choices making it harder for families with skilled workers to move here

\*\*Poor quality education options making it harder for families with skilled workers to move here

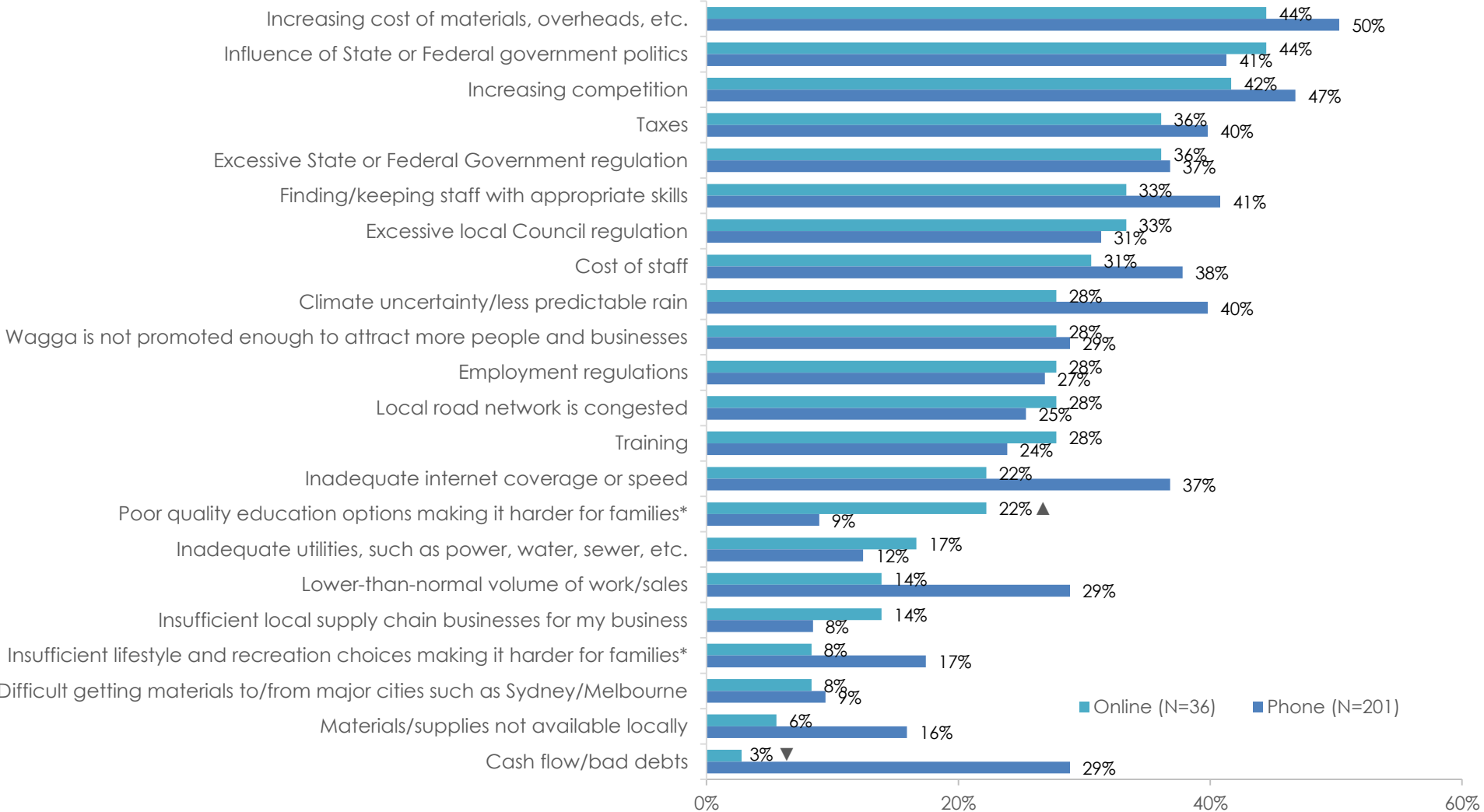
▲ ▼ = A significantly higher/lower percentage (by methodology)

**Online respondents were more likely to select 'excessive State or Federal Government regulation', the 'influence of State or Federal government politics', as well as 'excessive Council regulation' as the challenges currently facing their business.**

# Challenges Facing the Business in the Next 2 Years



Q9b. And which, if any, of the following potential challenges is your business likely to face in the next 2 years?



\*Insufficient lifestyle and recreation choices making it harder for families with skilled workers to move here

\*\*Poor quality education options making it harder for families with skilled workers to move here ▲ ▼ = A significantly higher/lower percentage (by methodology)

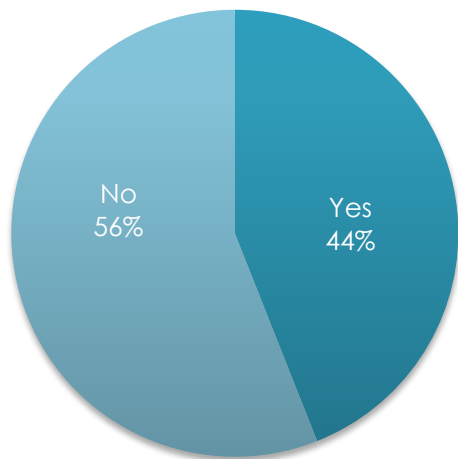
Looking forward to the next 2 years, online respondents see the increasing cost of materials/overheads (44%), and the influence of State or Federal Government politics (44%) as the greatest challenges likely to face their business.

Comparisons by methodology show online respondents were significantly more likely to have selected 'poor quality education options making it harder for families with skilled workers to move here' and less likely to have selected 'cash flow/bad debts'.

# Other Current Challenges Facing the Business



Q9a. Are there any other potential challenges your business is currently facing? – Online



	Phone	Online
Yes	25%	44%▲
No	75%	56%
Base	201	36

Other specified - Online	N=16
Drought	19%
Complying with Council/Government regulations/red tape	13%
Lack of commercial development/slow approvals process	13%
Skilled labour/quality staff shortage	13%
Companies need to feel confident that the decision agreed, won't change beyond what was agreed when first approved	6%
Educating people about what we do	6%
Ensuring local subcontractors are given the opportunity to quote on construction projects	6%
Lack of car parking/unmetred car parking	6%
Lack of lighting for safety	6%
Low market demand for strategic futurist services	6%
State and Federal elections	6%

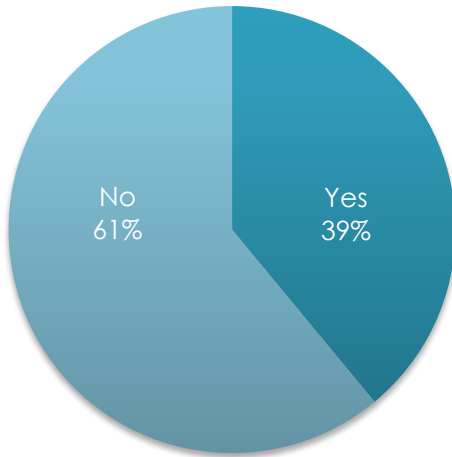
▲▼ = A significantly higher/lower percentage (by methodology)

**For online respondents, 44% suggested other current challenges facing the business, with drought the most predominant.**



# Other Challenges Facing the Business in the Next 2 Years

Q9b. Are there any other potential challenges your business likely to face in the next 2 years? – Online



	Phone	Online
Yes	20%	39%▲
No	80%	61%
Base	202	36

Other specified - Online	N=14
Growth generally	14%
NBN and support problems	14%
Skilled labour shortage/lack of quality of staff	14%
Competition from other builders, i.e. Metro and Albury based	7%
Ensuring local subcontractors are provided with the opportunity to quote	7%
Federal politics/decision making	7%
Food/fibre producers facing issues with protestors and extremists'	7%
Generally, the health of the local, state and national economies drives regional demand and this is uncertain	7%
Increased legislation around access to finance	7%
Increased regulation on food traceability	7%
Increasing commoditisation of compliance services in the market place will keep pressure on pricing	7%
Increasing technological change	7%
Lack of car parking/unmetered/all day parking	7%
Lack of lighting for safety	7%
Laws/regulations/red tape impacting on business	7%
Legal case with the Commonwealth in regards to water contamination	7%
Loss of sales/customers	7%
Motor Industry's gradual shift toward electric mobility	7%
Possible emissions related tax regimes (carbon tax) subject to federal election outcomes	7%
Transition to digital manufacturing; including capital costs and training	7%

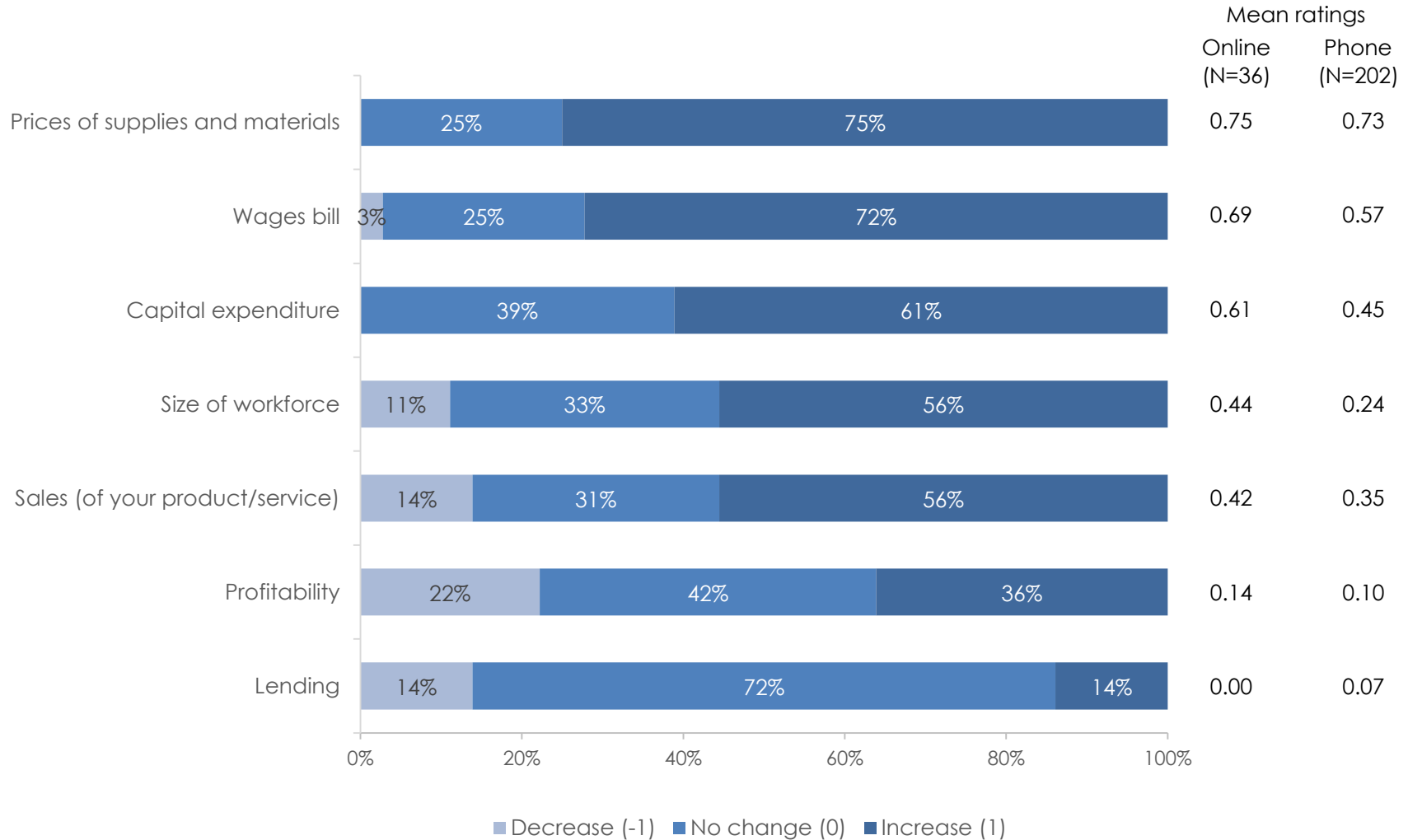
▲ ▼ = A significantly higher/lower percentage (by methodology)

**For online respondents, 39% believe there to be other challenges that will impact the business in the coming 2 years, with 'growth generally' and 'NBN and support problems' most prominent.**

# Business Performance



Q10a. Thinking about your business's performance over the last two years, have you experienced an increase, decrease or no change in the following?



Scale: -1 = decrease, 1 = increase

**At least 50% of online respondents have seen an increase in the price of supplies/materials, wages and capital expenditure and the size of the workforce, overall. 56% of respondents reported an increase in sales, while 36% indicated an increase in profitability.**

**There was no significant differences in results when compared by survey type – although if anything online respondents were more likely to say ‘increase’.**

# Business Performance – Size of Workforce



Q10b. [If 'Decrease' for Size of Workforce on Q10a] Which, if any, of the following explain why you have fewer staff now than two years ago? - Online

Q10c. [If 'No Change' for Size of Workforce on Q10a] Which, if any, of the following explain why you have not increased your overall staff levels over the past two years? – Online

## Decrease

	N = 4
Downturn in the business	2
Unable to find appropriately skilled staff	2
Cost of employing	1
Economic climate	1
Fair Work Australia regulations	1
Improved productivity/efficiency requiring fewer staff	1
Not enough confidence	1
Too many changes in regulations	1

## No change

	N = 12
Don't need any more staff	5
Can't afford to/budget/lack of funds/lack of profitability	2
Unable to find appropriately skilled staff	2
Fair Work Australia regulations	1
Our business is in partnership with no employees	1
Too many changes in regulations	1
We are a start-up business	1



# Appendix A: Additional Phone Analysis



# Business Advantages/Benefits of the Region



Q7b. Apart from 'liveability' aspects such as work-life balance, housing affordability, etc, what business-specific advantages or benefits, if any, do you believe the Wagga region offers business owners looking to move here? – Complete list

	N = 194
Centrally located between major cities, Sydney/Melbourne/Canberra/Adelaide	13%
Population in the area is growing	12%
Nett: Lower running costs for business owners	9%
Lower wages for employees	1%
More affordable rent	4%
Generally lower running costs	4%
Materials/supplies costs are lower	1%
Rates	1%
Steady economic growth/strong economy	7%
Ease of travelling in the area, i.e. lack of congestion, easy parking, ease of travelling to work	6%
Wagga Wagga is central and attracts others from outlying areas/Major hub	6%
Education opportunities/university provide well educated/skilled staff in the region	5%
Strong customer/client base in the region	5%
Broad demographic in the area, i.e. families, young skilled workers	4%
Good range of businesses in the area	4%
Nett: Cheaper start-up costs	4%
Cheaper land/premises	4%
More affordable businesses to buy	1%
Access to a diverse market place, i.e. defence, agriculture, health, correctional, tourism	3%
Access to major transport links	3%
Good/convenient access to services/facilities	3%
Strong community support for local businesses	3%
Access to large pool/good quality/reliable employees	2%
Plenty of employment opportunities	2%
Access to farmers/agricultural hub/rural industries	1%
Better staff morale due to location, ease of travel, flexibility	1%
City with a country feel	1%
Cleaner air	1%
Current/future growth opportunities, e.g. industrial zones, rail hub, aviation development	1%
Definite seasons	1%
Good location	1%
It's a progressive town with the defence force, university and hospital, with many learning/business-based benefits	1%
Little competition in the area	1%
Many promotional activities	1%
Strong government funding/initiatives/facilities/employment in the region	1%
Support from Council and levels of government	1%
There is plenty of space for more businesses/expansion	1%
The region offers no other advantages/benefits other than liveability	25%
Don't know/unsure	5%

# Current Challenges Facing the Business



Q9a. Which, if any, of the following challenges is your business currently facing?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific and Technical Services	Agriculture Forestry and Fishing	Other white collar	Other blue collar
Increasing cost of materials, overheads	55%	49%	46%	55%	67%	53%	59%	55%	56%	58%	59%
Finding/keeping staff with appropriate skills	49%	28%▼	54%	50%	50%	47%	65%	64%	33%	50%	63%
Taxes	49%	41%	31%▼	75%▲	67%	35%	53%	55%	56%	42%	50%
Inadequate internet coverage or speed	47%	44%	35%	40%	44%	53%	47%	82%▲	67%	58%	44%
Climate uncertainty/less predictable rain	45%	49%	27%▼	50%	33%	41%	41%	18%	100%▲	33%	63%▲
Cost of staff	40%	28%	27%	55%	39%	59%	65%▲	45%	22%	42%	38%
Increasing competition	40%	31%	42%	45%	33%	59%	35%	18%	56%	33%	47%
Influence of State or Federal government politics	39%	26%	38%	35%	50%	47%	47%	27%	33%	58%	41%
Wagga is not promoted enough to attract more people and businesses	37%	33%	38%	35%	44%	47%	53%	36%	11%	25%	38%
Excessive State or Federal Government regulation	35%	28%	27%	25%	39%	35%	35%	45%	33%	67%▲	38%
Excessive local Council regulation	32%	28%	38%	25%	44%	29%	35%	27%	11%	50%	28%
Lower-than-normal volume of work/sales	30%	33%	15%	30%	22%	12%	71%▲	18%	33%	25%	38%
Local road network is congested	27%	26%	19%	35%	33%	24%	18%	27%	11%	17%	41%
Cash flow/bad debts	26%	15%	12%	30%	50%▲	6%▼	47%▲	45%	11%	25%	31%
Employment regulations	24%	18%	8%▼	25%	22%	24%	29%	27%	22%	33%	38%▲
Training	22%	18%	15%	25%	17%	35%	35%	18%	22%	42%	13%
Materials/supplies not available locally	20%	23%	8%	20%	28%	29%	41%▲	27%	33%	0%	9%
Difficult getting materials to/from major cities such as Sydney and Melbourne	12%	3%▼	15%	10%	6%	6%	41%▲	9%	22%	17%	9%
Insufficient lifestyle and recreation choices making it harder for families with skilled workers to move here	12%	10%	0%▼	10%	6%	29%▲	18%	27%	0%	8%	16%
Inadequate utilities, such as power, water, sewer, etc	11%	5%	0%▼	20%	17%	6%	18%	9%	11%	8%	22%▲
Insufficient local supply chain businesses for my business	11%	18%	4%	20%	11%	0%	18%	9%	0%	8%	13%
Poor quality education options making it harder for families with skilled workers to move here	11%	5%	4%	10%	17%	6%	24%	18%	22%	0%	16%
Other	25%	23%	35%	30%	22%	18%	29%	18%	44%	8%	25%
Base	201	39	26	20	18	17	17	11	9	12	32

▲▼ = A significantly higher/lower percentage (by group)

# Current Challenges Facing the Business



Q9a. Which, if any, of the following challenges is your business currently facing?

	Small business	Medium business	Own/Manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Increasing cost of materials, overheads, etc.	55%	53%	56%	55%	69%	57%	52%
Finding/keeping staff with appropriate skills	48%	56%	56%	48%	38%	43%	53%
Taxes	48%	53%	30%	52%▲	69%▲	35%▼	49%
Inadequate internet coverage or speed	47%	50%	74%▲	43%	38%	50%	50%
Climate uncertainty/less predictable rain	47%	34%	52%	44%	46%	48%	45%
Cost of staff	40%	44%	22%	43%▲	54%	33%	40%
Increasing competition	40%	38%	30%	41%	38%	43%	40%
Influence of State or Federal government politics	37%	47%	44%	38%	50%	35%	37%
Wagga is not promoted enough to attract more people and businesses	38%	34%	44%	36%	46%	33%	38%
Excessive State or Federal Government regulation	35%	34%	15%	38%▲	50%	37%	30%
Excessive local Council regulation	31%	34%	22%	33%	54%▲	26%	29%
Lower-than-normal volume of work/sales	34%▲	9%	26%	31%	38%	30%	28%
Local road network is congested	27%	25%	19%	28%	46%▲	22%	25%
Cash flow/bad debts	28%	13%	15%	28%	35%	26%	25%
Employment regulations	24%	22%	22%	24%	12%	22%	26%
Training	20%	31%	22%	22%	15%	28%	21%
Materials/supplies not available locally	18%	31%	19%	21%	23%	20%	21%
Difficult getting materials to/from major cities such as Sydney and Melbourne	12%	9%	7%	13%	12%	13%	12%
Insufficient lifestyle and recreation choices making it harder for families with skilled workers to move here	12%	13%	11%	12%	23%	17%	7%▼
Inadequate utilities, such as power, water, sewer, etc.	12%	6%	7%	12%	12%	15%	11%
Insufficient local supply chain businesses for my business	11%	16%	15%	11%	27%▲	11%	9%
Poor quality education options making it harder for families with skilled workers to move here	12%	3%	11%	11%	15%	2%▼	12%
Other	24%	34%	26%	25%	38%	24%	22%
Base	169	32	27	174	26	46	121

▲▼ = A significantly higher/lower percentage (by group)

# Challenges Likely to Face in the Next 2 Years



Q9b. Which, if any, of the following challenges is your business likely to face in the next 2 years?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific and Technical Services	Agriculture Forestry and Fishing	Other white collar	Other blue collar
Increasing cost of materials, overheads	50%	44%	42%	60%	28%▼	53%	53%	55%	56%	67%	59%
Increasing competition	47%	36%	54%	55%	44%	47%	47%	36%	67%	58%	44%
Influence of State or Federal government politics	41%	41%	50%	30%	22%	59%	59%	27%	67%	50%	28%
Finding/keeping staff with appropriate skills	41%	26%▼	50%	40%	28%	59%	65%▲	45%	22%	58%	34%
Climate uncertainty/less predictable rain	40%	36%	42%	50%	39%	29%	47%	36%	67%	25%	38%
Taxes	40%	33%	23%	50%	44%	35%	47%	64%	44%	58%	34%
Cost of staff	38%	28%	27%	45%	33%	47%	65%▲	55%	56%	42%	25%
Excessive State or Federal Government regulation	37%	28%	42%	35%	17%	41%	47%	45%	44%	50%	38%
Inadequate internet coverage or speed	37%	21%▼	38%	45%	17%	41%	47%	64%	67%	50%	31%
Excessive local Council regulation	31%	23%	38%	35%	22%	35%	35%	36%	22%	42%	31%
Lower-than-normal volume of work/sales	29%	36%	19%	30%	33%	29%	41%	27%	33%	25%	19%
Cash flow/bad debts	29%	26%	23%	20%	33%	12%	41%	36%	33%	33%	38%
Wagga is not promoted enough to attract more people and businesses	29%	28%	35%	35%	17%	41%	35%	36%	11%	25%	22%
Employment regulations	27%	18%	15%	25%	11%	47%▲	47%▲	27%	56%▲	33%	25%
Local road network is congested	25%	21%	23%	25%	17%	12%	29%	36%	33%	25%	38%
Training	24%	13%	23%	35%	22%	41%	35%	27%	33%	33%	9%▼
Insufficient lifestyle and recreation choices making it harder for families with skilled workers to move here	17%	13%	8%	15%	17%	24%	35%▲	27%	11%	25%	16%
Materials/supplies not available locally	16%	10%	12%	20%	28%	12%	41%▲	27%	22%	8%	3%▼
Inadequate utilities, such as power, water, sewer, etc	12%	3%▼	4%	15%	28%▲	12%	18%	27%	11%	8%	16%
Difficult getting materials to/from major cities such as Sydney and Melbourne	9%	8%	8%	5%	11%	0%	29%▲	9%	11%	17%	6%
Poor quality education options making it harder for families with skilled workers to move here	9%	3%	0%	5%	6%	18%	24%▲	18%	22%	0%	13%
Insufficient local supply chain businesses for my business	8%	10%	4%	25%▲	6%	0%	18%	9%	0%	8%	3%
Other	20%	23%	11%	15%	22%	12%	18%	0%	33%	25%	31%
Base	201	39	26	20	18	17	17	11	9	12	32

▲▼ = A significantly higher/lower percentage (by group)



# Challenges Likely to Face in the Next 2 Years



Q9b. Which, if any, of the following challenges is your business likely to face in the next 2 years?

	Small business	Medium business	Own/Manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/Not very likely to others encourage to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Increasing cost of materials, overheads, etc.	52%	41%	44%	51%	62%	52%	50%
Increasing competition	48%	41%	41%	48%	54%	43%	50%
Influence of State or Federal government politics	40%	50%	48%	40%	35%	48%	42%
Finding/keeping staff with appropriate skills	39%	50%	48%	40%	38%	39%	43%
Climate uncertainty/less predictable rain	39%	44%	41%	40%	42%	39%	42%
Taxes	39%	44%	48%	39%	62%▲	30%	40%
Cost of staff	37%	41%	44%	37%	38%	30%	42%
Excessive State or Federal Government regulation	36%	44%	30%	38%	50%	39%	36%
Inadequate internet coverage or speed	34%	53%▲	44%	36%	35%	46%	35%
Excessive local Council regulation	30%	41%	33%	31%	50%▲	30%	30%
Lower-than-normal volume of work/sales	31%	16%	15%	31%	46%	28%	27%
Cash flow/bad debts	33%▲	9%	30%	29%	38%	28%	29%
Wagga is not promoted enough to attract more people and businesses	28%	34%	33%	28%	31%	22%	33%
Employment regulations	26%	31%	33%	26%	27%	22%	30%
Local road network is congested	27%	19%	19%	26%	38%	26%	23%
Training	21%	38%▲	22%	24%	15%	26%	26%
Insufficient lifestyle and recreation choices making it harder for families with skilled workers to move here	16%	25%	11%	18%	19%	17%	17%
Materials/supplies not available locally	12%	34%▲	15%	16%	19%	11%	18%
Inadequate utilities, such as power, water, sewer, etc.	12%	16%	11%	13%	12%	13%	12%
Difficult getting materials to/from major cities such as Sydney and Melbourne	10%	6%	4%	10%	4%	7%	12%
Poor quality education options making it harder for families with skilled workers to move here	9%	6%	4%	10%	8%	4%	11%
Insufficient local supply chain businesses for my business	7%	16%	7%	9%	23%▲	9%	6%
Other	19%	22%	41%▲	17%	23%	22%	19%
Base	169	32	27	174	26	46	121

▲▼ = A significantly higher/lower percentage (by group)

# Health of the Local/State Economies



Q8a. Thinking about the state of the economy, what is your perception of the current health of the Local economy and the broader NSW and Victorian economies?

## Current Health

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Local	-0.01	-0.10	0.04	0.20	0.17	0.00	-0.06	-0.27	0.11	0.09	-0.16
NSW/VIC	-0.08	-0.03	-0.11	0.10	-0.11	0.06	-0.06	-0.36	-0.22	0.09	-0.25

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Local	-0.06	0.22	0.00	-0.02	-0.23	-0.11	0.05
NSW/VIC	-0.15	0.25▲	-0.26	-0.06	-0.27	-0.09	-0.07

## Health in the Next 2 Years

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Local	0.38	0.36	0.41	0.45	0.50	0.29	0.59	0.36	0.44	0.33	0.22
NSW/VIC	0.36	0.31	0.41	0.55	0.44	0.41	0.29	0.36	0.44	0.25	0.25

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Local	0.38	0.41	0.41	0.38	0.08▼	0.28	0.48▲
NSW/VIC	0.33	0.53	0.41	0.35	0.19	0.17	0.45▲

Scale: -1 = slowing down, 1 = growing  
▲ ▼ = A significantly higher/lower rating (by group)



# Other Challenges Facing the Business



Q9a. Are there any other potential challenges your business is currently facing? – Complete list

	N=51
Lack of car parking/unmetred car parking	18%
Complying with Council/Government regulations/red tape	14%
Drought	10%
Competition from online businesses	8%
Skilled labour/quality staff shortage	8%
Lack of support from Council	6%
Rising costs, i.e. utilities	6%
State and Federal elections	4%
Ability to export using railway links or hubs	2%
Air bnb impacting on our business	2%
Animal activist groups and greens against greyhound racing	2%
Changing dynamics of the hospitality industry	2%
Dealing with Wagga Wagga base hospital administration in relation to their budgets and targets verses our patients care	2%
Impact of social media on businesses	2%
Issues surrounding the isolation from major cities	2%
Lack of a feasibility study for child care centres in the region that will allowing capping of businesses	2%
Lack of cashflow	2%
Lack of development in the area	2%
Lack of expansion of motor vehicle related business or recreation	2%
Lack of Government funded infrastructure	2%
Lack of promotion of local businesses	2%
Lack of tourism	2%
Legal case with the Commonwealth in regards to water contamination	2%
Major franchises moving into the area taking my customers	2%
Market changing	2%
NBN and support problems	2%
Pharmacy course at the local university has ceased	2%
Piracy of movies	2%
Poor road quality outside my business	2%
The changes of the ATO are making it easier for people to do their taxes online which affects our business	2%
There are no large malls with high customer traffic in the Wagga Wagga CBD for us to move in to	2%
Unemployment rates	2%



# Other Challenges Facing the Business



Q9b. Are there any other potential challenges your business likely to face in the next 2 years? – Complete list

	N=40
Skilled labour shortage/lack of quality of staff	18%
Competition/impact of online businesses	10%
Drought	10%
Laws/regulations/red tape impacting on business	10%
Rising costs, i.e. utilities, raw materials	8%
Federal politics/decision making	5%
Loss of sales/customers	5%
Air bnb impacting on our business	3%
Animal activist groups and greens against greyhound racing	3%
Cash flow decreasing overall	3%
Complying with Council regulations/red tape	3%
Inadequate road infrastructure to move increasing freight around and outside of region	3%
Influx of podiatry trained students coming out of CSU University - Albury	3%
International brands moving in and taking customers away	3%
Lack of room for physical expansion due to Council owning too much land	3%
Lack of support from Council	3%
Over supply of accommodation	3%
Overseas market movements as clients export product internationally	3%
Piracy of movies	3%
Plans for a bypass would reduce customer traffic	3%
Potential shortage of housing would reduce the size of our customer base	3%
Staying in business	3%
The slowdown in farming as our work revolves around the state of farming	3%
The slowdown in real estate affects us causing less work for our business	3%



# Business Performance



Q10a. Thinking about your business's performance over the last two years, have you experienced an increase, decrease or no change in the following?

	Overall	Retail Trade	Health Care and Social Assistance	Accomm. and Food Services	Construction	Education and Training	Manufacturing	Professional, Scientific & Technical Services	Agriculture, Forestry and Fishing	Other white collar	Other blue collar
Prices of supplies and materials	0.73	0.62	0.67	0.80	0.67	0.53	0.88	0.91	0.56	0.92▲	0.88▲
Wages bill	0.57	0.41	0.70	0.65	0.72	0.88▲	0.76	0.36	0.44	0.58	0.38
Capital expenditure	0.45	0.36	0.33	0.60	0.28	0.59	0.53	0.55	0.11	0.50	0.59
Sales	0.35	0.36	0.56	0.45	0.39	0.18	0.06	0.18	0.44	0.08	0.44
Size of workforce	0.24	0.13	0.56▲	0.25	0.06	0.65▲	0.00	0.00	0.33	0.08	0.22
Profitability	0.10	0.10	0.33	0.30	0.00	0.29	-0.06	-0.18	-0.11	-0.17	0.06
Lending	0.07	-0.08▼	0.07	0.10	0.33	-0.06	0.29	0.36	0.11	0.17	-0.13

	Small business	Medium business	Own/manage business outside Wagga Wagga	Do not own/manage business outside of Wagga Wagga	Not at all likely/ Not very likely to encourage others to Wagga region	Somewhat likely to encourage others to Wagga region	Likely/Very likely to encourage others to Wagga region
Prices of supplies and materials	0.75	0.66	0.81	0.72	0.85	0.67	0.74
Wages bill	0.51	0.91▲	0.78▲	0.54	0.42	0.50	0.64
Capital expenditure	0.42	0.59	0.52	0.44	0.58	0.37	0.47
Sales	0.30	0.59▲	0.52	0.32	-0.12▼	0.41	0.43
Size of workforce	0.20	0.44	0.48	0.20	0.08	0.20	0.28
Profitability	0.06	0.28	0.04	0.11	-0.35▼	0.13	0.17
Lending	0.06	0.13	0.04	0.07	0.08	0.09	0.08

Scale: -1 = decrease, 1 = increase  
 ▲ ▼ = Significantly higher/lower (by group)



# Appendix B: Demographics Phone and Online



# Demographics



Q1a. Apart from your business in the Wagga Wagga Region, do you own or manage any other businesses outside the Wagga region?

	Online	Phone
Yes	31%▲	13%
No	69%	87%
Base	36	202

Q1b. (If yes) Where else do you have businesses?

	Online	Phone
Griffith	9%	11%
Sydney	0%	11%
Melbourne	0%	7%
The Riverina	0%	7%
Albury	0%	4%
Bathurst	0%	4%
Bowral	0%	4%
Canberra	9%	4%
Goulburn	0%	4%
Junee	0%	4%
Lockhart	0%	4%
Manly	0%	4%
Mooloolaba	0%	4%
Multiple locations Australia wide	27%▲	4%
Narrandera	0%	4%
Northern Victoria	0%	4%
Overseas	0%	4%
Port Macquarie	0%	4%
Tamworth	0%	4%
Toowoomba	0%	4%
Woden	0%	4%
Brisbane	9%	0%
Hillston	9%	0%
Townsville	9%	0%
Tumut	9%	0%
Ulladulla	9%	0%
Walla Walla	9%	0%
Base	11	27

▲▼ = A significantly higher/lower percentage (by methodology)



# Demographics



Q2. Which area or areas does your Wagga-based business mainly service?

	Online	Phone
The local Wagga Wagga area	75%	97%▲
The greater Riverina area	78%	82%
Elsewhere in NSW	50%	41%
The ACT	33%	28%
Elsewhere in Victoria	39%	25%
Sydney	36%▲	21%
Melbourne	31%	19%
The rest of Australia	19%	17%
Overseas	14%	9%
Base	36	202

▲▼ = A significantly higher/lower percentage (by methodology)





# Demographics



Q11. What is the major product and/or service provided by your business?

Online	N = 36
Nett: Building/construction	14%
<i>Building/construction</i>	8%
<i>Construction supplies</i>	3%
<i>Civil/earthwork</i>	3%
Accounting/tax/financial/insurance services	14%
Consultancy	14%
Media/Marketing/communications	9%
Nett: Healthcare	8%
<i>Dental</i>	3%
<i>Medical imaging</i>	3%
<i>Skin cancer treatment</i>	3%
Property sales and management	6%
Farm machinery	6%
Food and beverage	6%
Motor vehicle rental	6%
Art	3%
Dry cleaner/alterations	3%
Hair/beauty	3%
Legal	3%
Manufacturing	3%
Transport	3%
Water cartage	3%



# Demographics



Q11. What is the major product and/or service provided by your business?

Phone	N = 202
Nett: Healthcare	12%
Healthcare/medical	5%
Dental	1%
Podiatry	1%
Hearing devices	<1%
Natural health provider	<1%
Ophthalmology	<1%
Pathology	<1%
Pharmaceutical	<1%
Rehabilitation equipment	<1%
Sleep apnoea testing	<1%
Surgical services	<1%
Retail	12%
Nett: Building/construction	9%
Building/construction	1%
Concrete	1%
Electrical	1%
Bricklaying	<1%
Building materials	<1%
Construction supplies	<1%
Crane and demolishing services	<1%
Glass installations	<1%
Joinery	<1%
Landscaping	<1%
Painting	<1%
Plumbing	<1%
Shed construction	<1%
Swimming pool construction	<1%

Phone	N = 202
Food and beverage	8%
Mechanical services and repairs	8%
Childcare	4%
Accommodation	3%
Accounting/tax/financial/insurance services	3%
Education	3%
Hair/beauty	3%
Manufacturing	3%
Media/Marketing/communications	2%
Architecture/design	1%
Bicycle retail and servicing	1%
Consultancy	1%
Dry cleaner/alterations	1%
Electrical wholesale	1%
Farm machinery	1%
Landscape supplies	1%
Property sales and management	1%
Recreation	1%
Recycling	1%
Refrigeration and air-conditioning wholesales	1%
Service and maintenance	1%
Service to airlines	1%
Signage	1%
Support services	1%
Transport	1%
Truck sales/service	1%

Phone	N = 202
Audio visual supplies	<1%
Dog grooming	<1%
Drivers' licence training	<1%
Engineering and supplies	<1%
Fabrics	<1%
Gas	<1%
Horse supplies	<1%
Jewellery and repairs	<1%
Legal	<1%
Locksmithing	<1%
Motor vehicle rental	<1%
Musical instruments	<1%
Postal services	<1%
Sand and gravel supply	<1%
Solar panel installation	<1%
Stock and station agent	<1%
Technical engineering and testing	<1%
Transportable homes	<1%
Travel	<1%
Veterinary services	<1%
Water cartage	<1%
Wholesale	<1%



# Demographics



Q12. In what suburb or town is your business located?

	Online	Phone
Wagga Wagga Central	61%	70%
East Wagga Wagga	8%	9%
Koorringal	0%	4%
Lake Albert	3%	3%
Ashmont	0%	2%
Gumly Gumly	0%	2%
Turvey Park	0%	2%
Bowman	8%	1%
Tatton	6%	1%
Forest Hill	0%	1%
Mount Austin	0%	1%
South Wagga Wagga	0%	1%
Tumbarumba	3%	0%
Mangoplah	3%	0%
Headquarters in Sydney, however, a significant proportion of the workforce is in Wagga Wagga	3%	0%
Kensington	3%	0%
Boorooma	0%	<1%
Gelston Park	0%	<1%
Glenfield Park	0%	<1%
North Wagga Wagga	0%	<1%
Tolland	3%	<1%
Base	36	202



# Demographics



Q13. How many employees are currently employed in your business?

	Online	Phone
Small - less than 20 employees	39%▼	79%
Medium - between 20-199 employees	42%▲	16%
Non-employing	8%	3%
Home business	6%	2%
Large - 200+ employees	6%▲	0%
Base	36	202

Q14. In what industry do you operate your business?

	Online	Phone
Retail Trade	3%	19%▲
Health Care and Social Assistance	8%	13%
Accommodation and Food Services	6%	10%
Construction	11%	9%
Education and Training	3%	8%
Manufacturing	11%	8%
Professional, Scientific and Technical Services	6%	5%
Agriculture, Forestry and Fishing	8%	4%
Wholesale Trade	3%	3%
Information Media and Telecommunications	6%	2%
Transport, Postal and Warehousing	3%	2%
Administrative and Support Services	6%	1%
Arts and Recreation Services	3%	1%
Electricity, Gas, Water and Waste Services	6%	1%
Financial and Insurance Services	14%▲	1%
Mining	0%	<1%
Other	6%	8%
Base	36	202

▲▼ = A significantly higher/lower percentage (by methodology)



# Appendix C: Questionnaire



Good morning/afternoon/evening, my name is .....from Micromex Research and we are conducting a survey on behalf of Wagga Wagga City Council on a range of issues facing local businesses. The survey will take about 10 minutes, would you be able to assist us please?

(If respondent says they do not have time, try to make an appointment – if they decline the appointment direct them to Council's website to complete the survey).

QA1. Can I please speak to the main decision maker/manager of this business?

- Yes
- No (Organise call back)

QA2. Could I please confirm your details?

Business name: .....  
Trading name: .....  
Position / Title: .....  
Contact name: .....

Q1a. Apart from your business in the Wagga Wagga Region, do you own or manage any other businesses outside the Wagga region?

- Yes
- No (Go to Q2)

Q1b. Where else do you have businesses? .....

(If Yes on Q1a), When answering all remaining questions, please think only about your business in the local Wagga region".

Q2. Which area or areas does your Wagga-based business mainly service? (MR) Prompt

- The local Wagga Wagga area
- The greater Riverina area
- Sydney
- Elsewhere in NSW
- Melbourne
- Elsewhere in Victoria
- The ACT
- The rest of Australia
- Overseas

Q3a. Over the past two years, how confident have you been about your business prospects? Prompt

- Extremely confident
- Confident
- Somewhat confident
- Not very confident
- Not at all confident
- (Do not read) Can't say

Q3b. And thinking about the next two years, how confident do you feel about your business prospects? Prompt

- Extremely confident
- Confident
- Somewhat confident
- Not very confident
- Not at all confident
- (Do not read) Can't say

Q3c. Overall, how is your business performing now compared to two years ago? Prompt

- A lot better off
- A little better off
- About the same
- A little worse off
- A lot worse off

Q4a. In the next two years, how likely, if at all, are you to close or sell your Wagga-based business so you are no longer involved in it? Prompt (SR) FLIP CODES EXCEPT CANT SAY

- Very likely
- Likely
- Somewhat likely
- Not very likely (Go to Q5a)
- Not at all likely (Go to Q5a)
- (Do NOT Prompt) Can't say (Go to Q5a)

Q4b. May I ask why you are [Q4a] to close or sell your business in the next two years?

.....

Q5a. In the next two years, how likely, if at all, are you to move your Wagga-based business away from the region? Prompt (SR) FLIP CODES EXCEPT CANT SAY

- Very likely
- Likely
- Somewhat likely
- Not very likely (Go to Q6)
- Not at all likely (Go to Q6)
- (Do NOT Prompt) Can't say (Go to Q6)

Q5b. May I ask why you are [Q5a] to move your business away from the region in the next two years?

.....

Q6. In the next two years, how likely, if at all, are you to expand your existing Wagga-based business into larger or additional premises within the region? Prompt (SR) FLIP CODES EXCEPT CANT SAY

- Very likely
- Likely
- Somewhat likely
- Not very likely
- Not at all likely
- (Do NOT Prompt) Can't say

Q7a. If you were asked, how likely, if at all, would you be to actively encourage businesses to move to the Wagga region? *Prompt (SR) FLIP CODES EXCEPT CAN'T SAY*

- Very likely
- Likely
- Somewhat likely
- Not very likely
- Not at all likely
- (Do NOT Prompt) Can't say

Q7b. Apart from 'liveability' aspects such as work-life balance, housing affordability, etc, what business-specific advantages or benefits, if any, do you believe the Wagga region offers business owners looking to move here?

.....

Q8a. Thinking about the state of the economy, what is your perception of the current health of the Local economy and the broader NSW and Victorian economies? *Prompt ROTATE*

	Slowing down	Standing still	Growing
Local (now)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NSW/VIC (now)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q8b. And what is your perception of the health of the local economy and the broader NSW and Victorian economies for the next two years? *Prompt ROTATE*

	Slowing down	Standing still	Growing
Local (next two years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NSW/VIC (next two years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q9a. Which, if any, of the following potential challenges is your business currently facing? Please just say Yes or No as I read each one. *Prompt (MR) RANDOMISE*

Q9b. And which, if any, of the following potential challenges is your business likely to face in the next two years? Please just say Yes or No as I read each one. *Prompt (MR) RANDOMISE*

	Q9a Now	Q9b Next 2 Years
Lower-than-normal volume of work/sales	<input type="radio"/>	<input type="radio"/>
Increasing competition	<input type="radio"/>	<input type="radio"/>
Finding/keeping staff with appropriate skills	<input type="radio"/>	<input type="radio"/>
Excessive State or Federal government regulation	<input type="radio"/>	<input type="radio"/>
Excessive local Council regulation	<input type="radio"/>	<input type="radio"/>
Cost of staff	<input type="radio"/>	<input type="radio"/>
Increasing cost of materials, overheads, etc.	<input type="radio"/>	<input type="radio"/>
Inadequate internet coverage or speed	<input type="radio"/>	<input type="radio"/>
Inadequate utilities, such as power, water, sewer, etc.	<input type="radio"/>	<input type="radio"/>
Climate uncertainty/less predictable rain	<input type="radio"/>	<input type="radio"/>
Cash flow/bad debts	<input type="radio"/>	<input type="radio"/>
Taxes	<input type="radio"/>	<input type="radio"/>
Employment regulations	<input type="radio"/>	<input type="radio"/>
Wagga is not promoted enough to attract more people and businesses	<input type="radio"/>	<input type="radio"/>
Training	<input type="radio"/>	<input type="radio"/>
Insufficient local supply chain businesses for my business	<input type="radio"/>	<input type="radio"/>
Materials/supplies not available locally	<input type="radio"/>	<input type="radio"/>
Local road network is congested	<input type="radio"/>	<input type="radio"/>
Difficult getting materials to/from major cities such as Sydney and Melbourne	<input type="radio"/>	<input type="radio"/>
Poor quality education options making it harder for families with skilled workers to move here	<input type="radio"/>	<input type="radio"/>
Insufficient lifestyle and recreation choices making it harder for families with skilled workers to move here	<input type="radio"/>	<input type="radio"/>
Influence of State or Federal Government politics	<input type="radio"/>	<input type="radio"/>
Other (please specify).....	<input type="radio"/>	<input type="radio"/>

Q10a. Thinking about your business's performance over the last two years, have you experienced an increase, decrease or no change in the following? *Prompt (SR) ROTATE*

	Increase	No change	Decrease
Sales (of your product/service)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Size of workforce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages bill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prices of supplies and materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profitability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Capital expenditure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lending	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q10b.** [If 'Decrease' for Size of Workforce on Q10a] Which, if any, of the following explain why you have fewer staff now than two years ago? Please answer yes or no as I read each one. **Prompt (MR)**  
**RANDOMISE**

- Downturn in the business
- Improved productivity/efficiency requiring fewer staff
- Unable to find appropriately skilled staff
- Employees can't access transport to get to my business
- Cost of employing
- Economic climate
- Not enough confidence
- Too many changes in regulations
- Fair Work Australia regulations
- Other (please specify).....

**Q10c.** [If 'No Change' for Size of Workforce on Q10a] Which, if any, of the following explain why you have not increased your overall staff levels over the past two years? Please answer yes or no as I read each one. **Prompt (MR)** **RANDOMISE**

- Don't need any more staff
- Can't afford to/budget/lack of funds/lack of profitability
- Unable to find appropriately skilled staff
- Cost of employing
- Employees can't access transport to get to my business
- Economic climate
- Not enough confidence
- Too many changes in regulations
- Fair Work Australia regulations
- Improved productivity/efficiency meaning we don't need additional staff
- Other (please specify).....

**Q11.** What is the major product and/or service provided by your business? .....

**Q12.** In what suburb or town is your business located? .....

**Q13.** How many employees are currently employed in your business?

- Home business
- Non-employing
- Small - less than 20 employees
- Medium - between 20-199 employees
- Large - 200+ employees

**Q14.** In what industry do you operate your business?

- Administrative and Support Services
- Agriculture, Forestry and Fishing
- Accommodation and Food Services
- Arts and Recreation Services
- Construction
- Education and Training
- Financial and Insurance Services
- Health Care and Social Assistance
- Information Media and Telecommunications
- Manufacturing
- Mining
- Public Administration and Safety
- Professional, Scientific and Technical Services
- Retail Trade
- Transport, Postal and Warehousing
- Electricity, Gas, Water and Waste Services
- Wholesale Trade
- Other (please specify).....

Wagga Wagga City Council will use the information provided by survey respondents solely for the purpose of supporting economic development. All personal information collected will not form part of any publicly released information. Personal and or detailed information will only be used to verify respondent's survey group status. Any reports generated by the use of personal information will report group, rather than individual, responses.

If you have any questions about this survey please contact Dominic Kennedy, Economic Development Officer, Wagga Wagga Council 02 6926 9145.

Thank you very much for taking part, enjoy the rest of your day.





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