

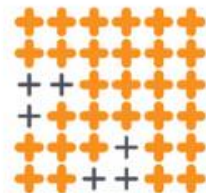


2015 HILLS SHIRE BUSINESS PERFORMANCE SENTIMENT INDEX

Delivering the pulse of local Hills Shire businesses

POWERED BY

mccrindle
FORECASTS • STRATEGY • RESEARCH



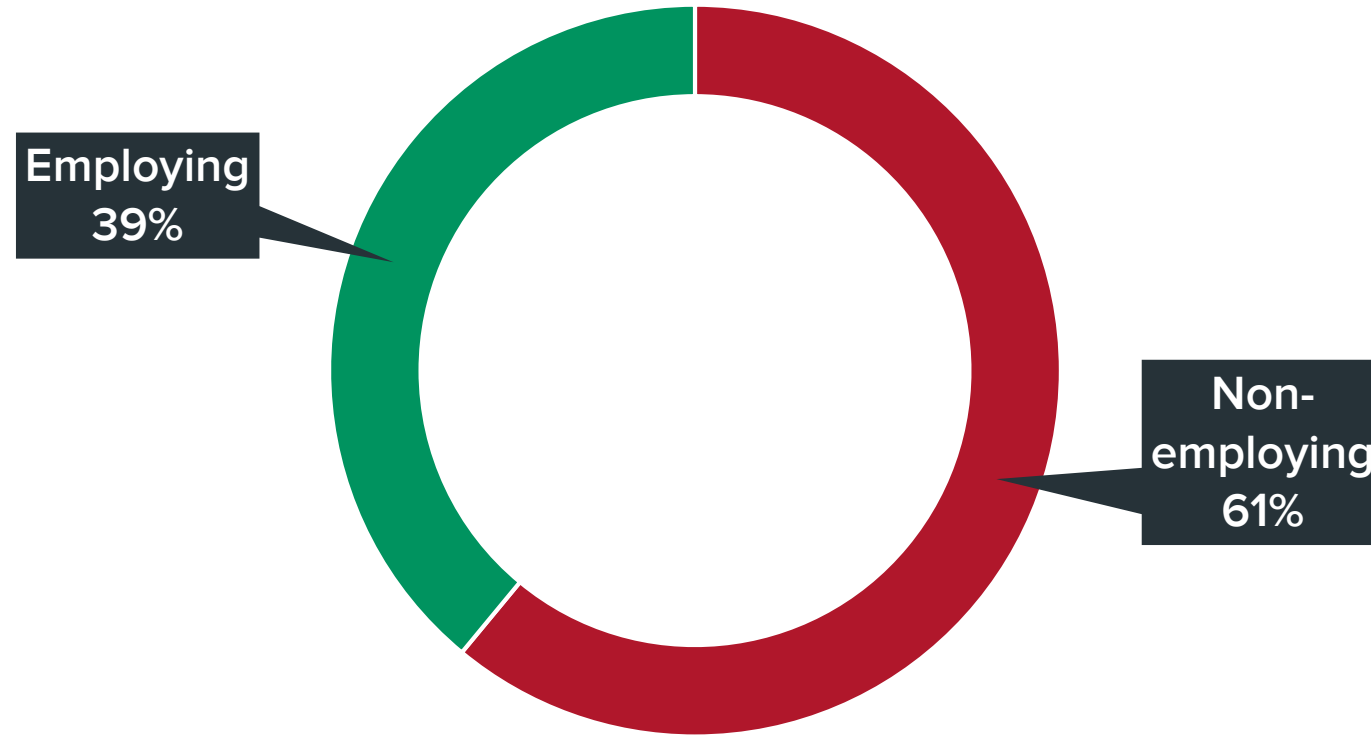
Sydney Hills
**BUSINESS
CHAMBER**

THE HILLS
Sydney's Garden Shire

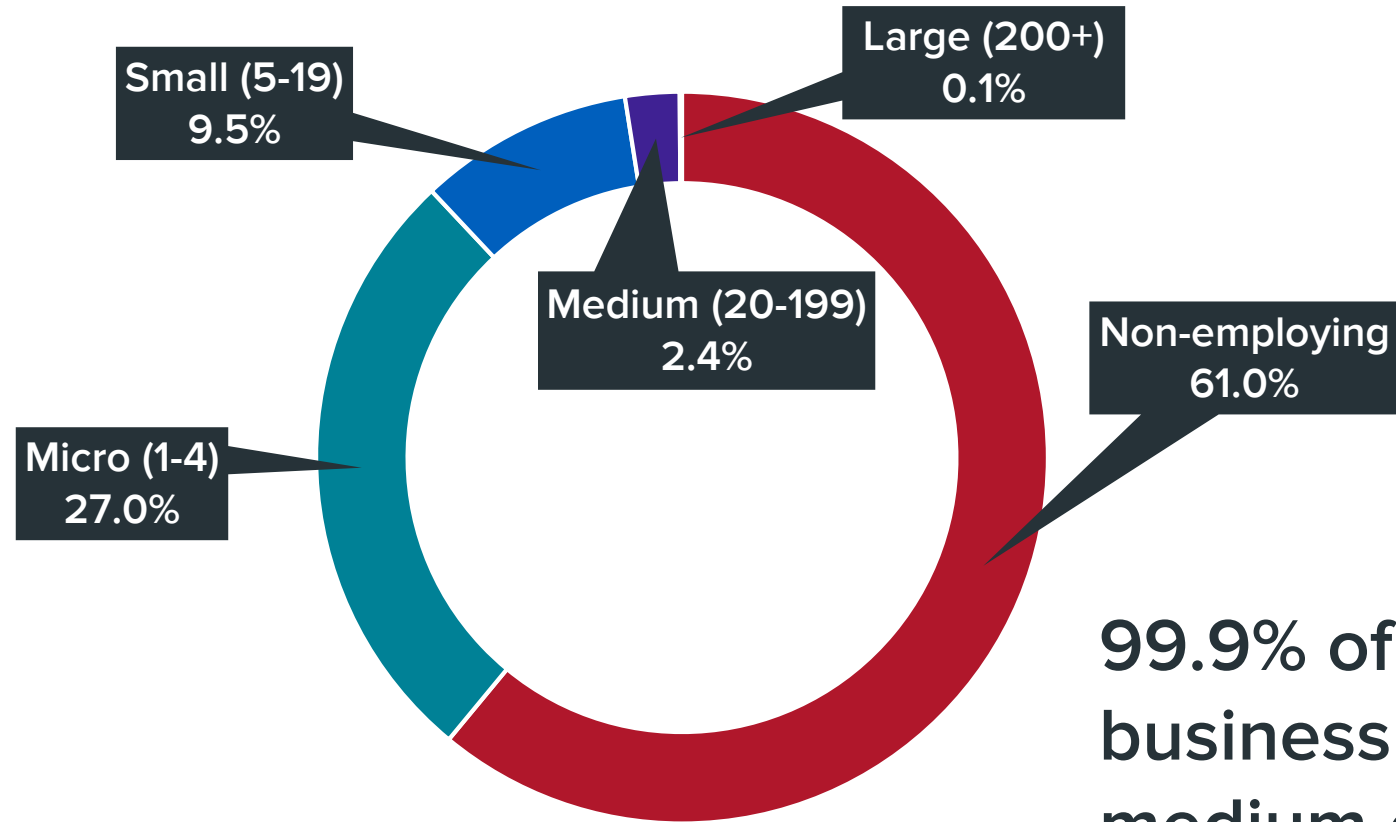
BUSINESSES IN AUSTRALIA – ACTIVELY TRADING



SMALL BUSINESS NATION



SMALL BUSINESS NATION



99.9% of all Australian business are small to medium enterprises

BUSINESSES IN NSW — ACTIVELY TRADING



700,000

That's 1/3 of
Australia's total

BUSINESSES STARTS AND EXITS (NSW)

385

New start-ups every
business day

350

New closures every
business day

SURVIVAL RATES

3 year survival rate – all businesses



3 year survival rate – new businesses



EXIT RATES - CONTRIBUTING FACTORS

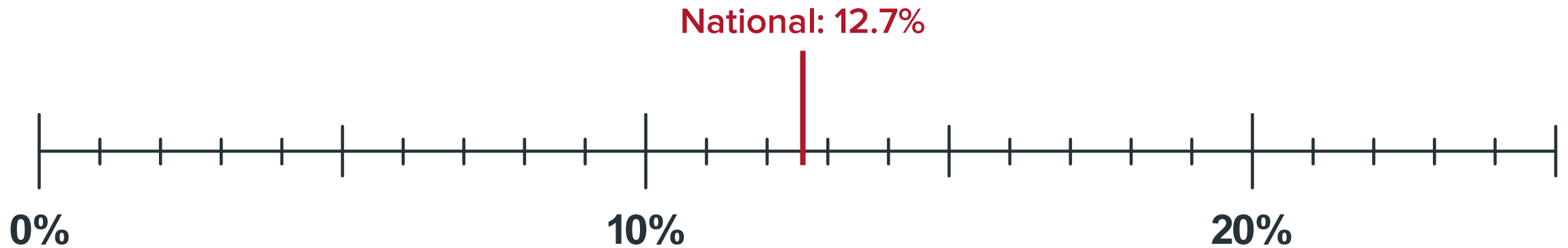
Annual exit rate

By sector

By employment

By structure

By turnover



EXIT RATES - CONTRIBUTING FACTORS

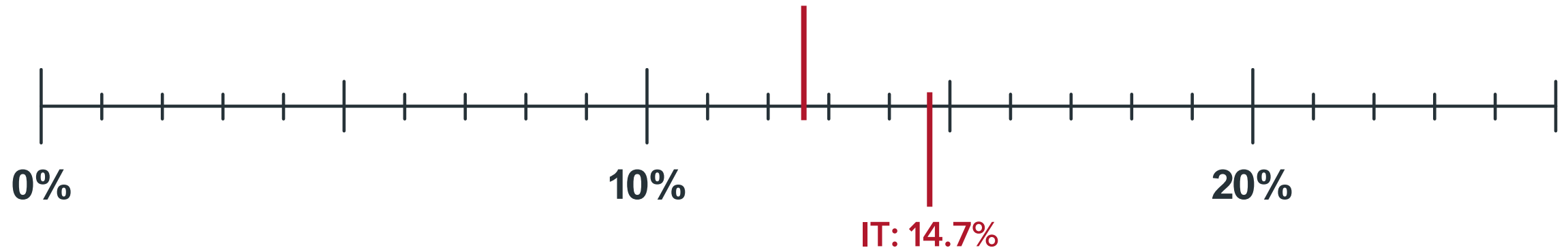
Annual exit rate

By sector

By employment

By structure

By turnover



EXIT RATES - CONTRIBUTING FACTORS

Annual exit rate

By sector

By employment

By structure

By turnover

Accommodation
& food services:
14.9%



EXIT RATES - CONTRIBUTING FACTORS

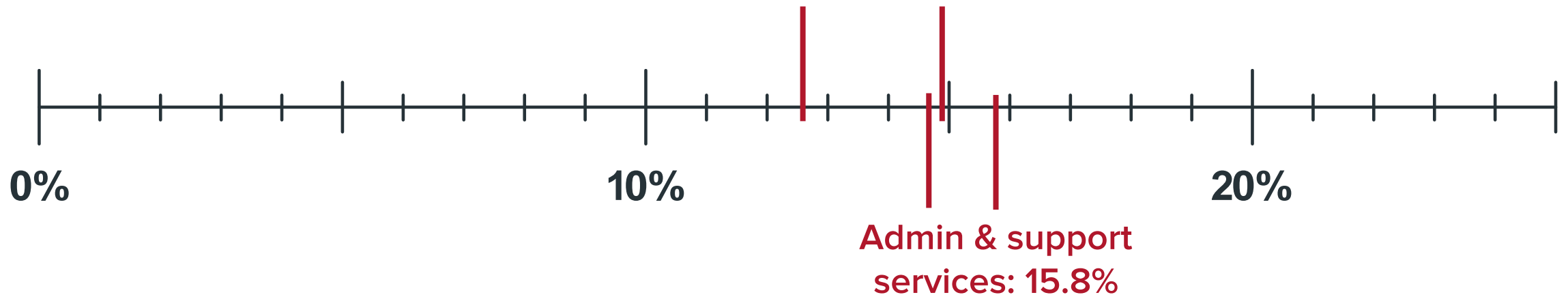
Annual exit rate

By sector

By employment

By structure

By turnover



EXIT RATES - CONTRIBUTING FACTORS

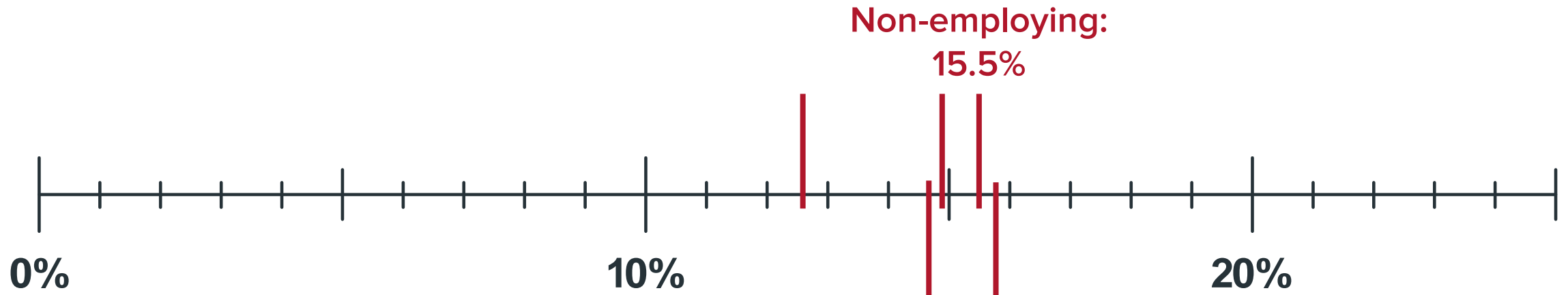
Annual exit rate

By sector

By employment

By structure

By turnover



EXIT RATES - CONTRIBUTING FACTORS

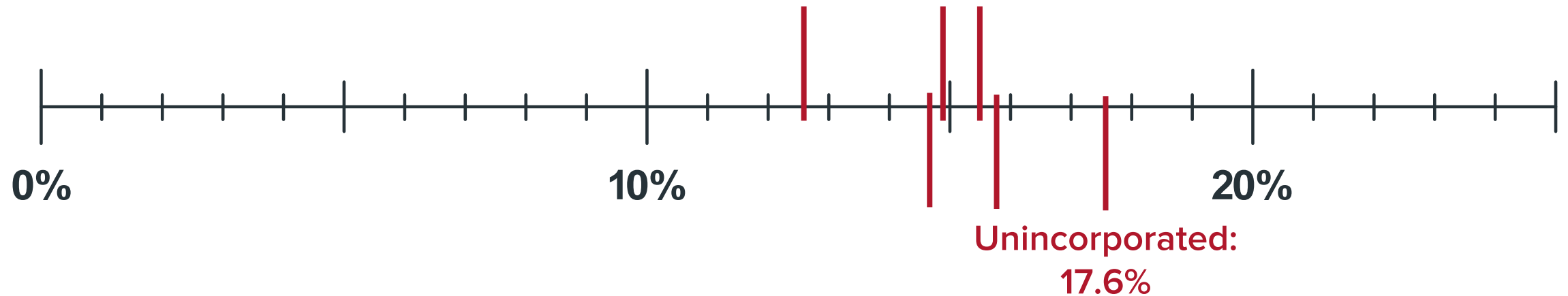
Annual exit rate

By sector

By employment

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EXIT RATES - CONTRIBUTING FACTORS

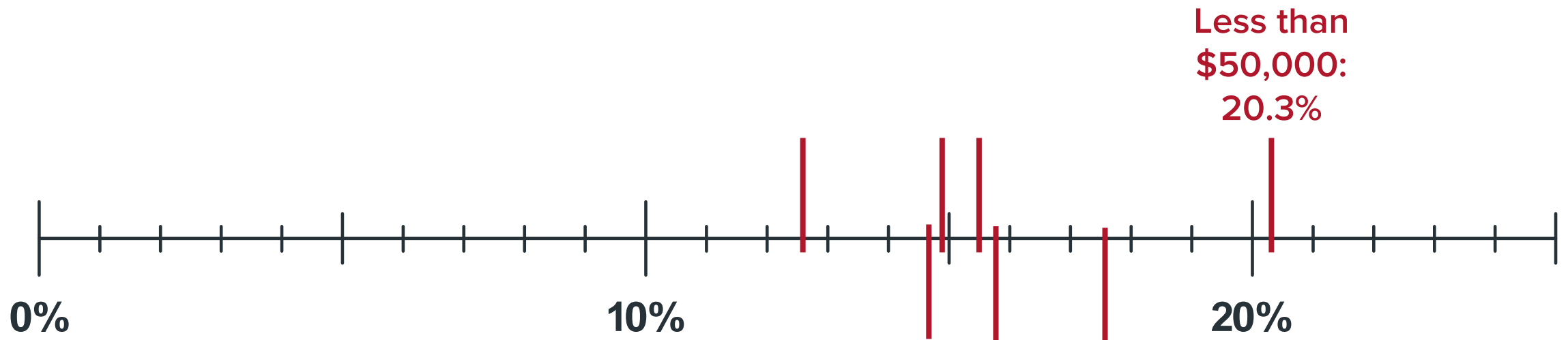
Annual exit rate

By sector

By employment

By structure

By turnover





METHODOLOGY

METHODOLOGY

- Online survey August 2015
- Survey of businesses geographically located in the Hills Shire LGA
- **179** business owners and managers completed the survey
- **90%** owners/managers of businesses
- **15** sectors represented

Business PSI Research Partners:



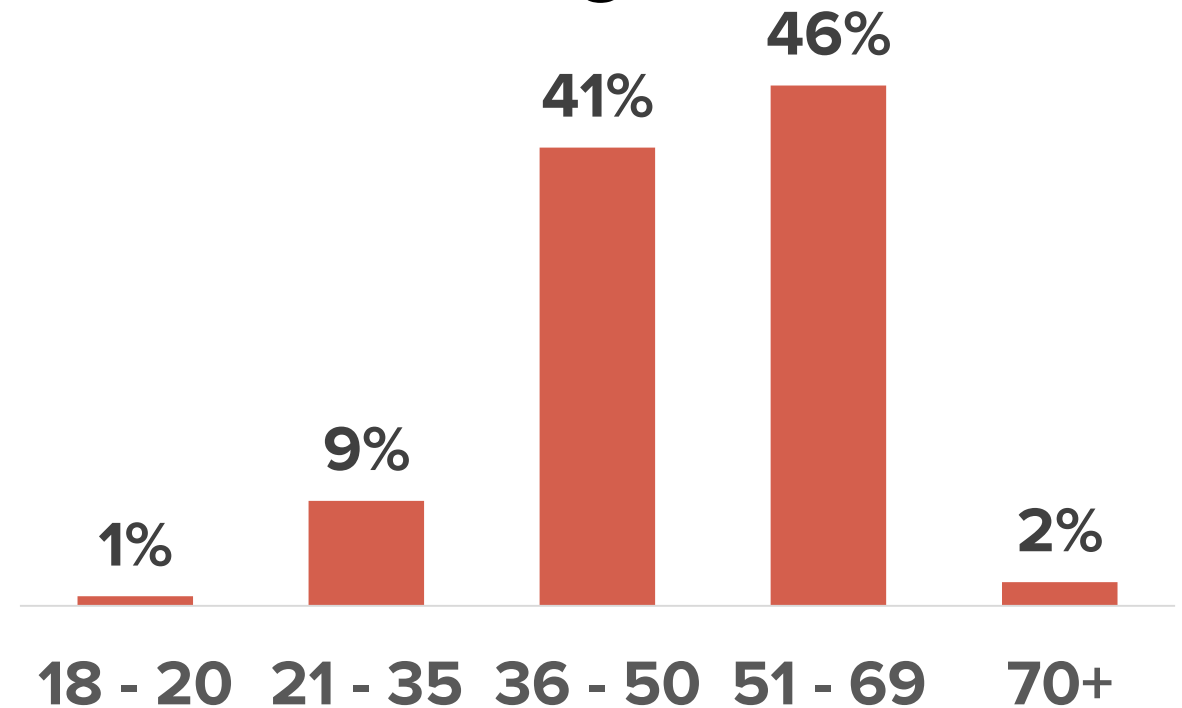
WHO ARE THEY?

Gender



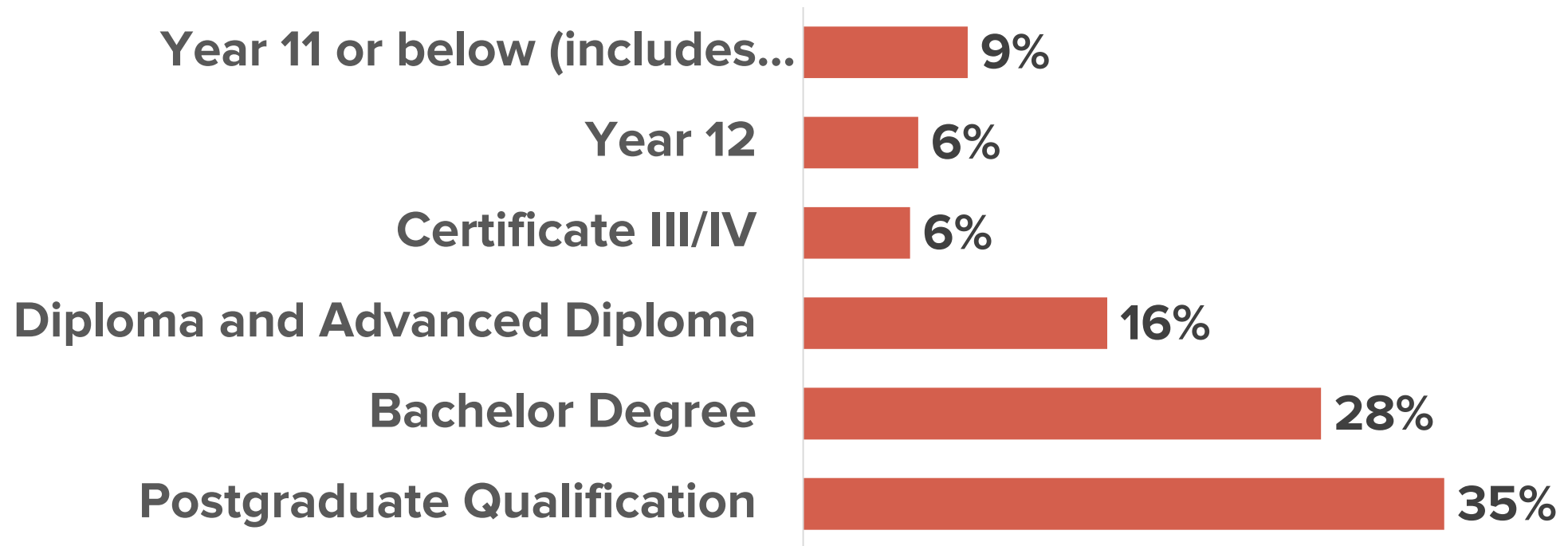
■ Male ■ Female

Age



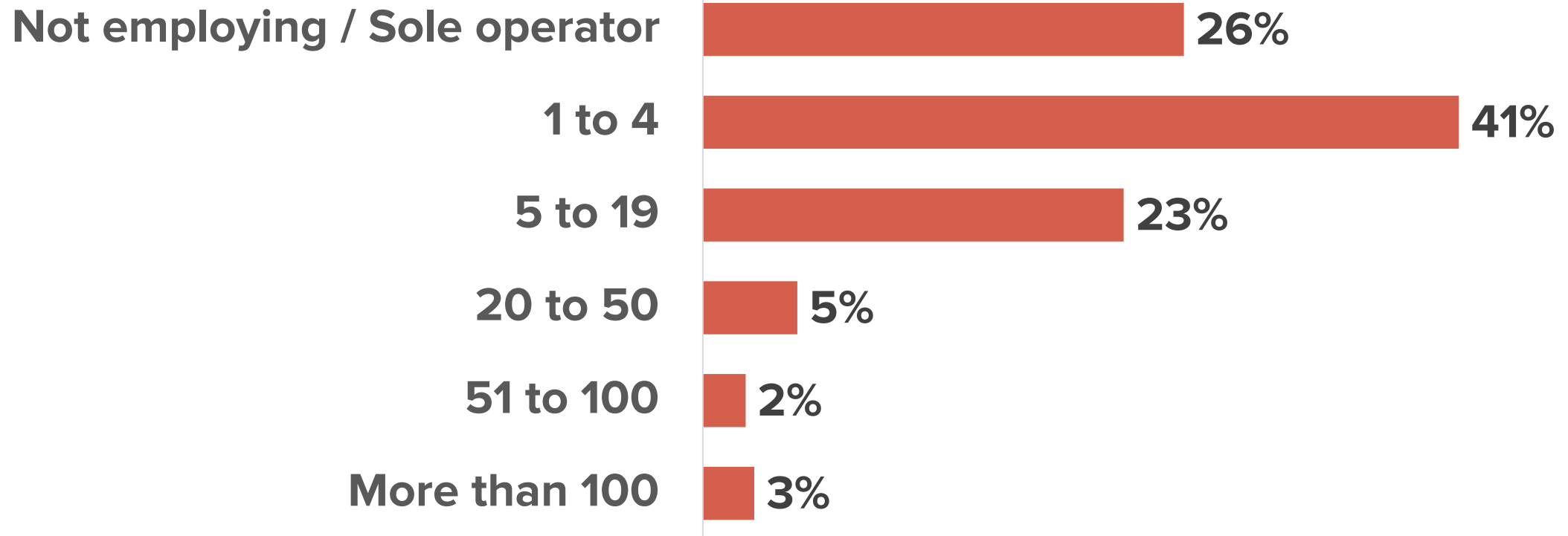
WHO ARE THEY?

Highest level of completed education



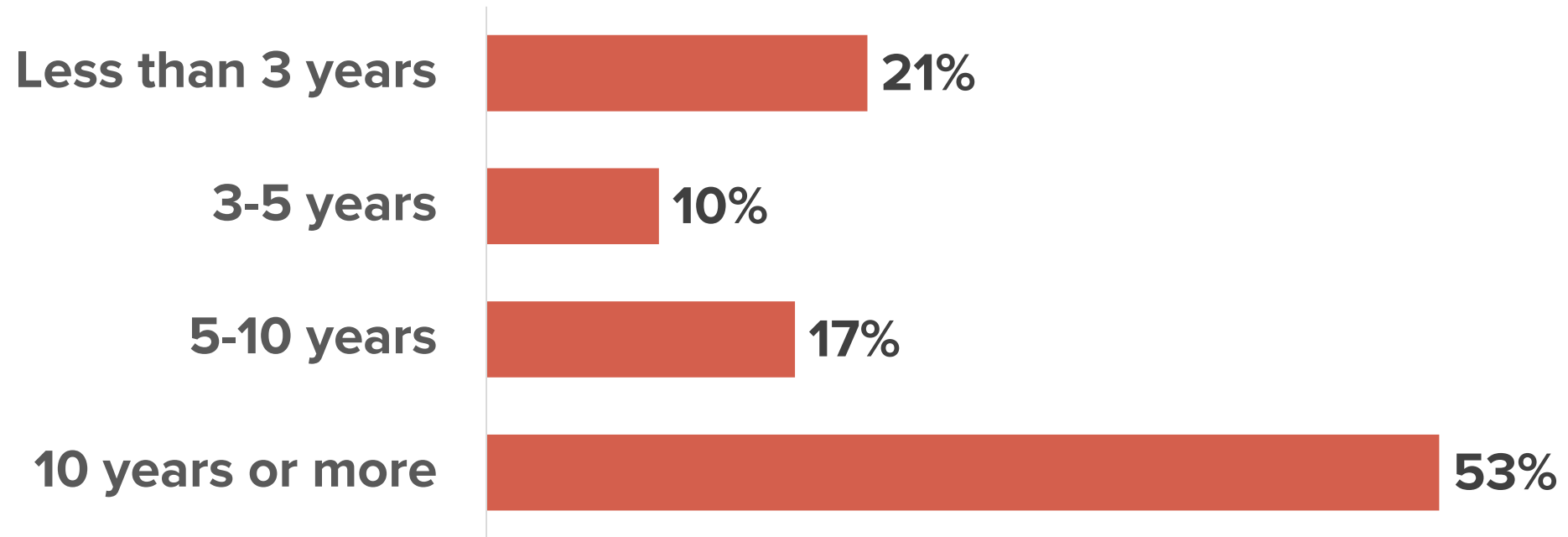
WHO ARE THEY?

Business Size by Employees



WHO ARE THEY?

Length of being a business owner



BUSINESS

PSI

CONDITIONS PERFORMANCE SENTIMENT

BUSINESS

PSI

3 Categories

9 Measures

21 Indicators

CONDITIONS

| | |
|------------------------------------|-----------------------------|
| Economic conditions | Local economy |
| | National economy |
| Regulatory settings | Red tape |
| | Policy settings |
| Infrastructure & locale | Local infrastructure |
| | Business growth |
| | Local outlook |

PERFORMANCE

Earnings

Revenue

Profit

Cash flow

Expenses

Operational expenses

Capital expenses

Employment

Staffing levels

Staff wages

SENTIMENT

Economic outlook

Cost forecast

Growth forecast

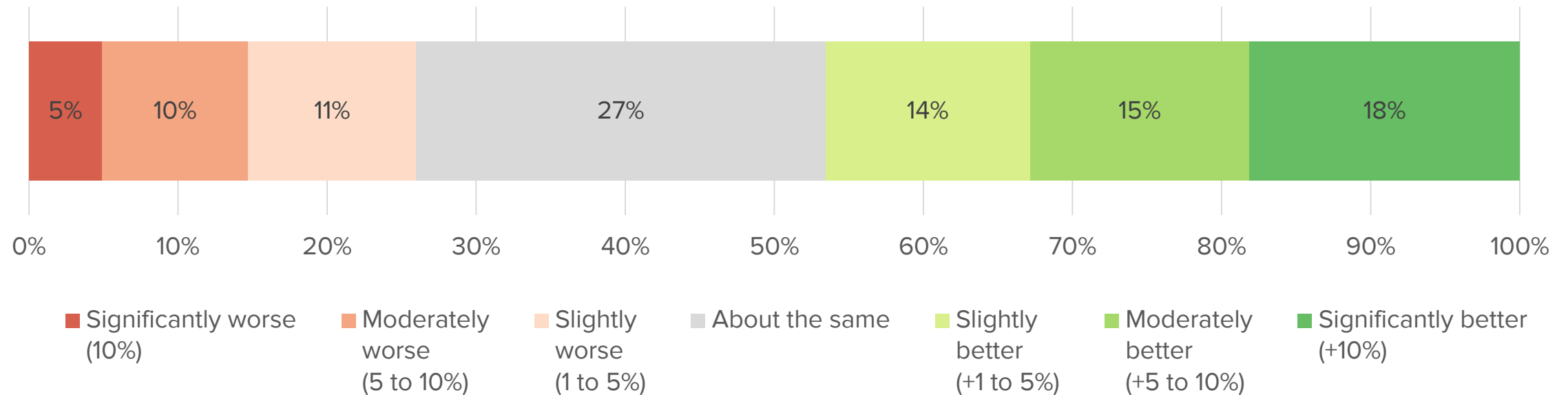
**National
Revenue**

**Expenses
Staffing levels**

**Profit
Cash flow
Expansion**

EXAMPLE QUESTION

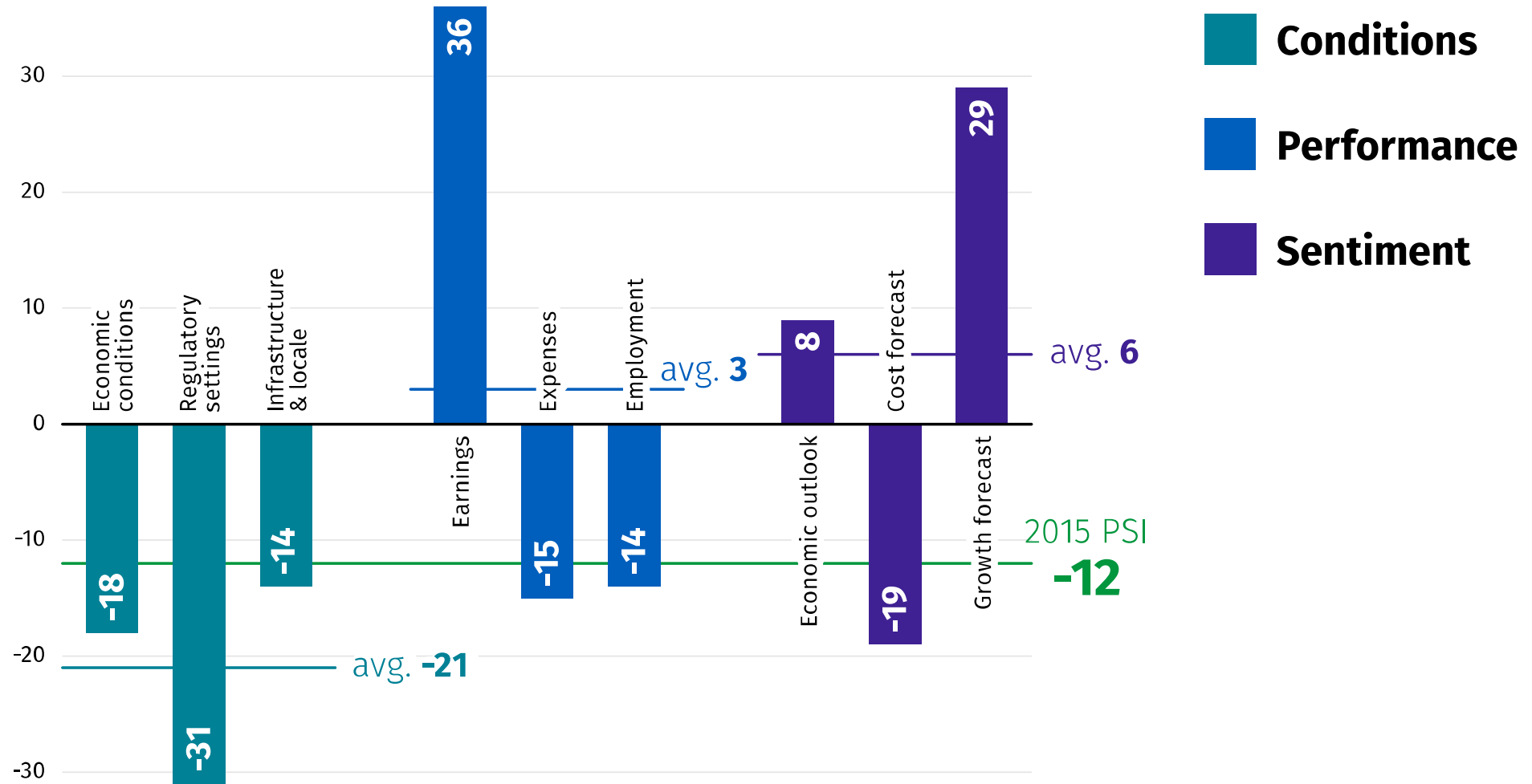
Q. Thinking about your overall sales revenue at the moment, how do they compare to 6 months ago?



BUSINESS PSI

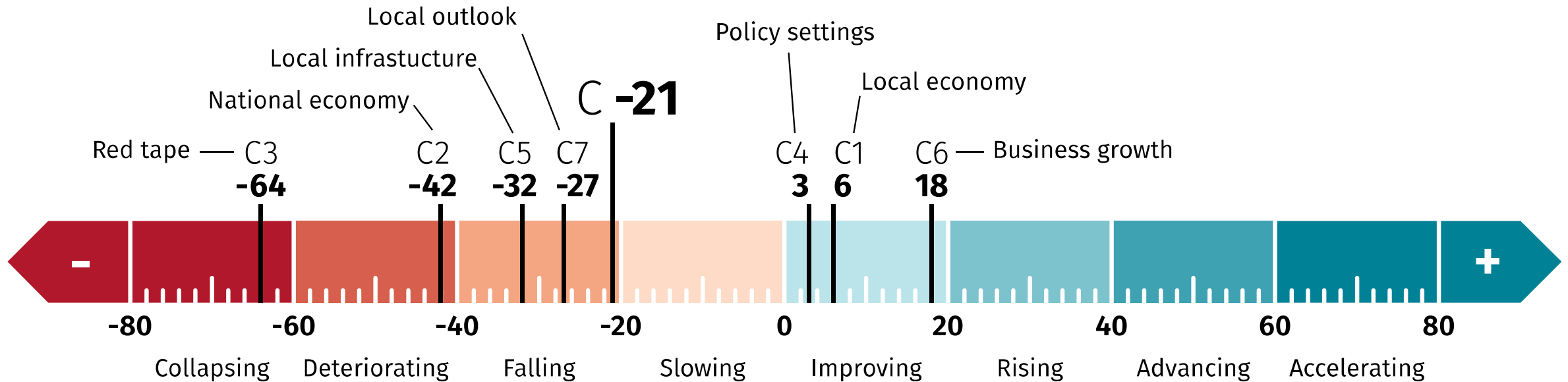


C, P AND S SNAPSHOT



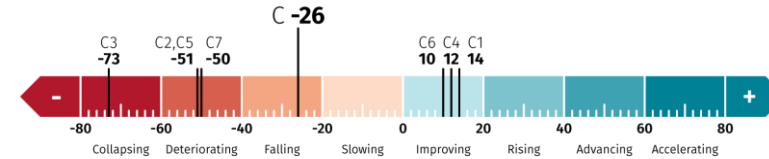
CONDITIONS

CONDITIONS OVERVIEW



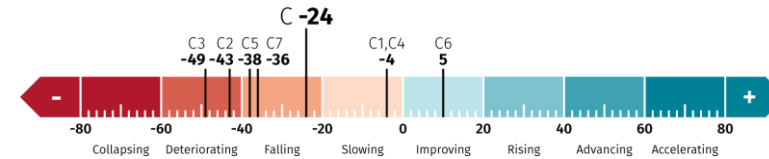
CONDITIONS BY BUSINESS SIZE

Non employing businesses



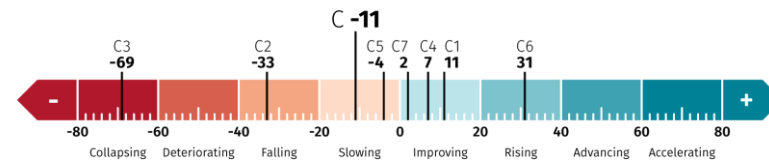
-26

Micro (1-4 employees)



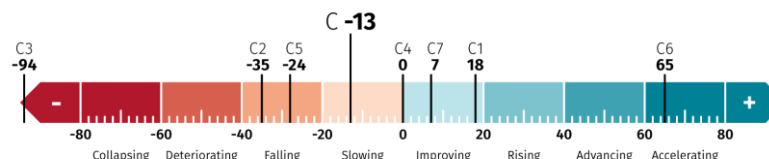
-24

Small (5-19 employees)



-11

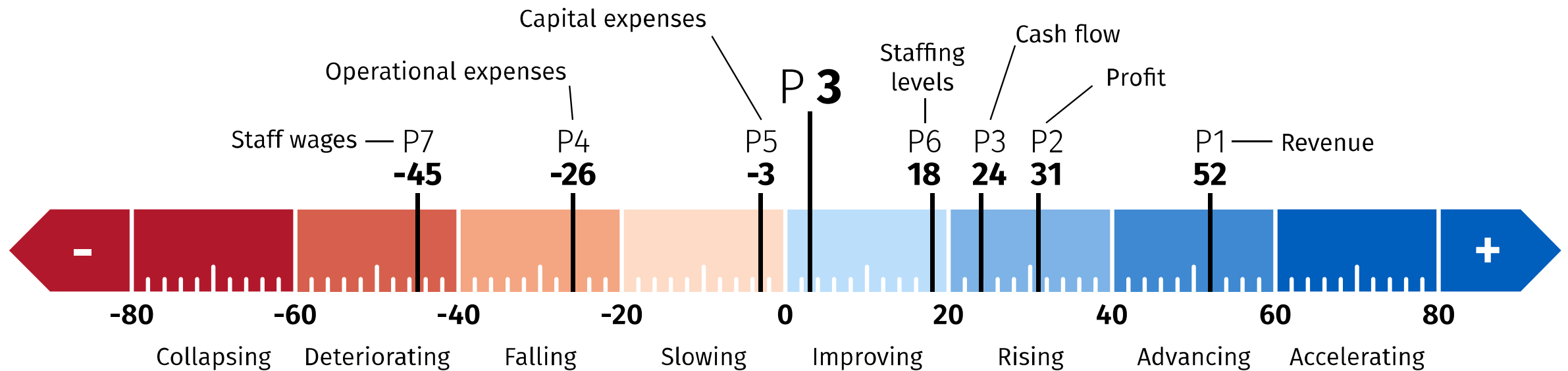
Medium+ (20+ employees)



-13

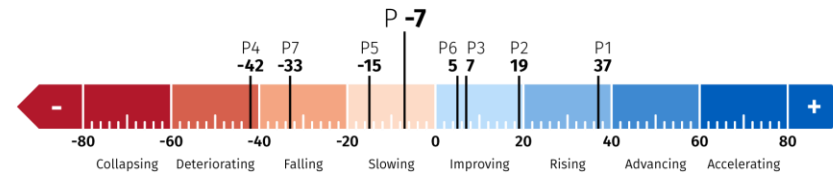
PERFORMANCE

PERFORMANCE OVERVIEW



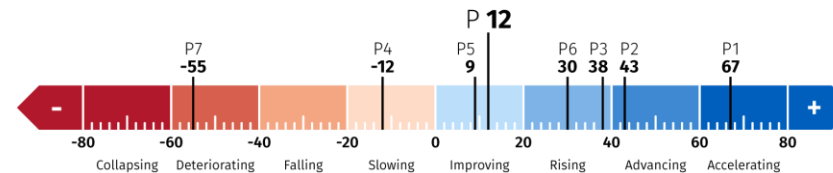
PERFORMANCE BY CLIENTS SERVED

B2C: Products/services to consumers



-7

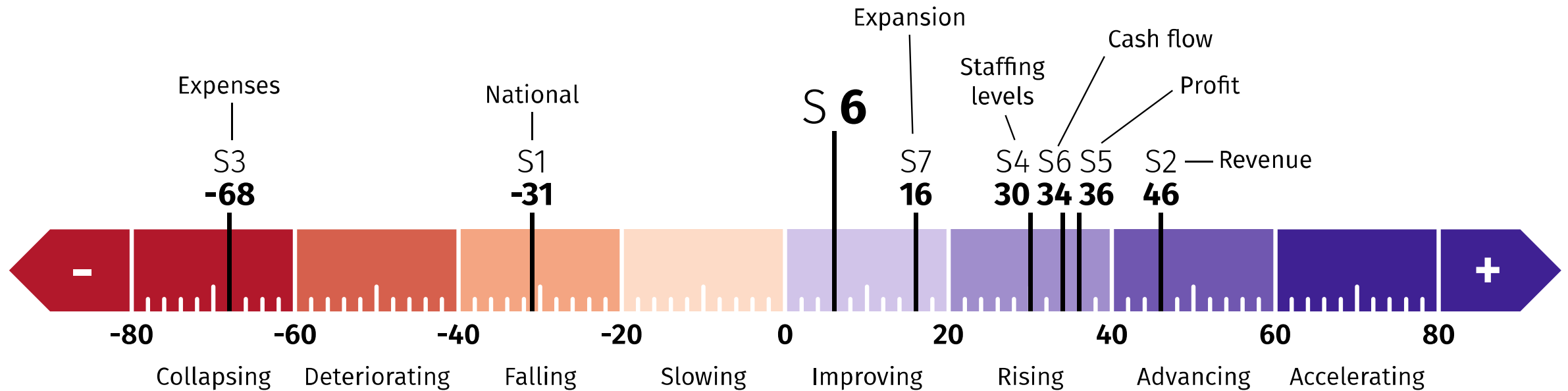
B2B: Products/services to businesses, public utilities and/or government



12

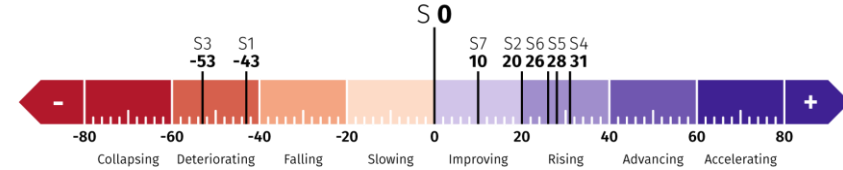
SENTIMENT

SENTIMENT OVERALL



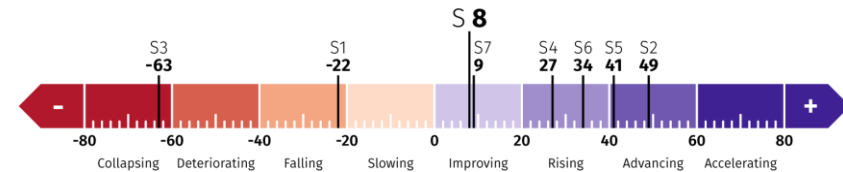
SENTIMENT BY BUSINESS SIZE

Non employing businesses



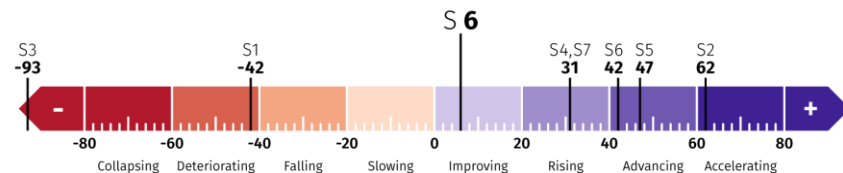
0

Micro (1-4 employees)



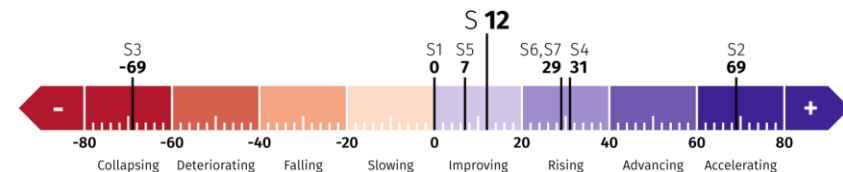
8

Small (5-19 employees)



6

Medium+ (20+ employees)



12

NEXT STEPS

NEXT STEPS

- Further analysis
- Longitudinal
- Benchmarking
- Next deployment: March 2016

Supported by:





Thank you!

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