

2011, 2012, 2013 and 2014 Warrnambool Business Confidence Survey

Industry Type and Size of Business

The analysis contained herein, compares and contrasts data collected in 2011, 2012, 2013 and 2014 regarding Warrnambool business confidence and expectation.

Dr Scott Salzman, Researcher and Senior Lecturer, School of Information Systems, Deakin University Warrnambool Victoria 3280.
Professor Greg Wood, Professor in Management, Deakin University, Victoria 3280

Methods: Data was supplied by the Warrnambool City Council. All analysis was conducted using XLStatistics (build date 11.12.12) and Microsoft Excel 2007. To assess for differences in respondent opinion between years and within industry groups, Pearson's Chi square goodness of fit test was used. In some instances, a z-test for proportions has been used. Where able, 95% confidence intervals for population parameter estimates are presented. To assess for differences between more than two means, an Analysis of variance test was used. The t-test for independent means was used where necessary. In some cases, to assist in identifying possible trends in a changing proportion of respondents over the three years of measurement, simple linear regression was used. Where assumptions required for any statistical analysis were not met, summary analysis only is presented and subsequent comment provided. For all hypothesis tests, critical alpha was set to 0.05. Where proportions don't sum to 1, data recorded in error was proportioned as error and is not presented. Further, there may be some small errors due to rounding.

The Australian Bureau of Statistics (ABS) defines a small business as having fewer than 20 employees, and micro businesses as having 4 employees or less. Medium-sized enterprises are defined as businesses with 20 to 199 employees. In Australia, small to medium-sized enterprises (SMEs) account for 95% of active businesses and employ 70% of the nation's workforce (MacGregor and Kertiwi, 2010), and are therefore a crucial component of the Australian economy. Globally, SMEs make a substantial contribution to national economies and are estimated to account for 80% of global economic growth (REF?). In Australia, they contribute to slightly more than 33% of Australia's Gross Domestic Product (GDP) (ASMEA, 2012). The estimated proportion of SMEs in Warrnambool (98.5%) is very similar to the national estimate and the importance of these businesses to Warrnambool's economy and future is therefore vital.

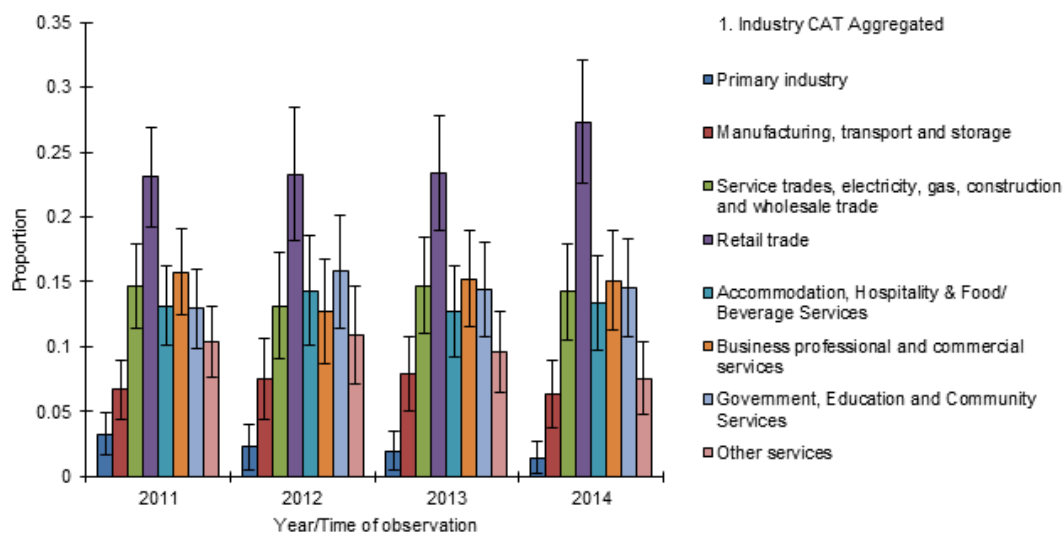
Editors please note: There were $n=463$ respondents in 2011, $n=266$ in 2012, $n=354$ in 2013 and $n = 344$ in 2014.

Principal industry sectors represented in both surveys

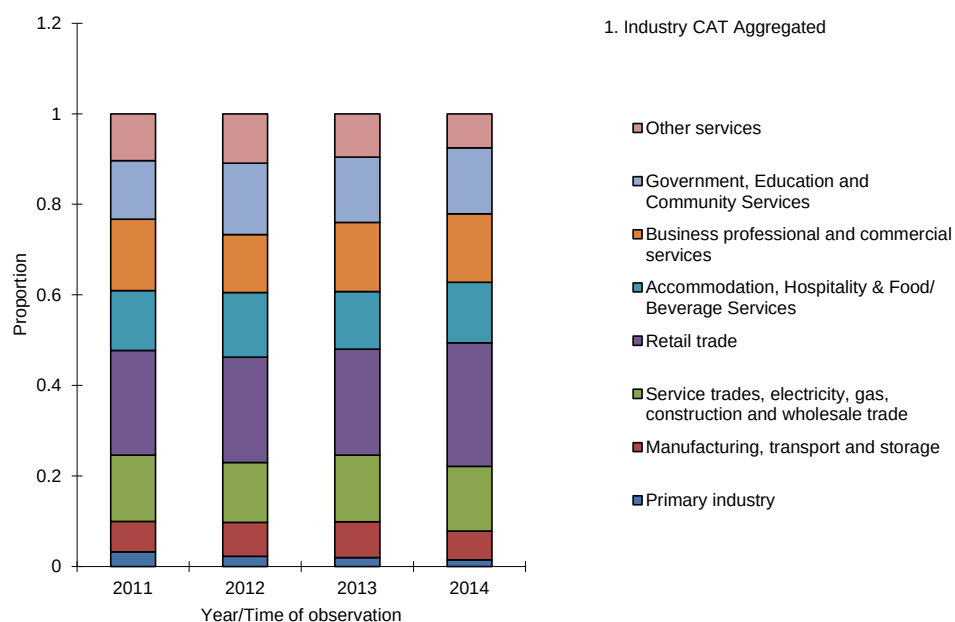
Has the proportion of the various industry groups represented in the sample each year changed over time?

	1. Industry CAT Aggregated									
	All	Primary industry	Manufacturing, transport and storage	Service trades, electricity, gas, construction and wholesale trade	Retail trade	Accommodation, Hospitality & Food/ Beverage Services	Business professional and commercial services	Government, Education and Community Services	Other services	
Year/Time of observation	All	100	2.31	7.08	14.30	24.25	13.31	14.93	14.23	9.60
	2011	100	3.24	6.70	14.69	23.11	13.17	15.77	12.96	10.37
	2012	100	2.26	7.52	13.16	23.31	14.29	12.78	15.79	10.90
	2013	100	1.98	7.91	14.69	23.45	12.71	15.25	14.41	9.60
	2014	100	1.45	6.40	14.24	27.33	13.37	15.12	14.53	7.56

Table: % of row



95% confidence intervals for proportions are presented



Stacked column chart showing the proportion of industry groups represented in each annual sample.

There were n=463 respondents in 2011, n=266 in 2012, n=354 in 2013 and n = 344 in 2014. Overall, the proportions of responses from industry type between the four years have remained relatively constant. That is, there is no statistical difference evident between the proportions of industry groups represented from year to year. (Chi-square 10.47, DF 21, p-value = 0.972)

The following section (Section 1) of this document pertains to analysis conducted on overall business perspectives. The separate industry groups are assessed individually in Section 2.

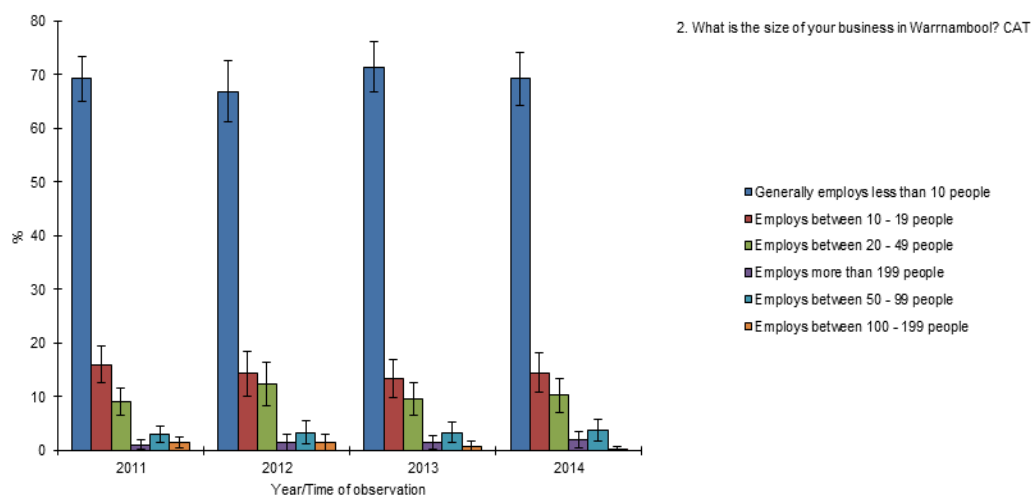
SECTION 1

With respect to the number of employees, has there been a change in the sizes of businesses over the years 2011, 2012, 2013 and 2014?

95% confidence intervals for proportions within group within year are presented

2. What is the size of your business in Warrnambool? CAT							
	All	Generally employs less than 10 people	Employs between 10 - 19 people	Employs between 20 - 49 people	Employs more than 199 people	Employs between 50 - 99 people	Employs between 100 - 199 people
All	100	69.36	14.65	10.12	1.47	3.35	1.05
2011	100	69.26	16.02	9.09	1.08	3.03	1.52
2012	100	66.92	14.29	12.41	1.50	3.38	1.50
2013	100	71.47	13.28	9.60	1.41	3.39	0.85
2014	100	69.23	14.53	10.26	1.99	3.70	0.28

Table: % of row



95% confidence intervals for proportions represented within each group within each year are presented.

No statistical difference is evident. That is overall, with respect to the number of employees, the sizes of organisations have not changed significantly between the four surveyed years (Chi-square 8.48, DF 15, p-value = 0.903).

The relative proportions of the different types of industries presently trading in Warrnambool, and the number of employees that they respectively hire, has remained similar over the four years of investigation. This year, there was only one respondent employing 199 or more staff.

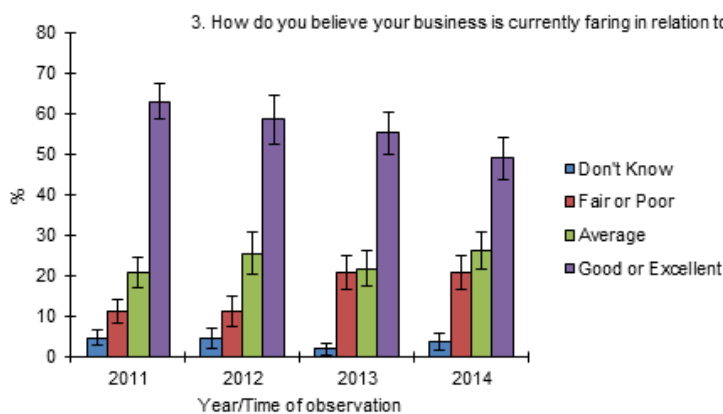
Perceptions of business performance from 2011 to 2014?

Perceived Performance in relation to other Regional Cities

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT					
	All	Don't Know	Fair or Poor	Average	Good or Excellent
All	100	3.77	15.99	23.32	56.91
2011	100	4.75	11.23	20.95	63.07
2012	100	4.51	11.28	25.56	58.65
2013	100	1.98	20.90	21.75	55.37
2014	100	3.72	20.92	26.36	49.00

Table: % of row

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria?



95% confidence intervals are presented.

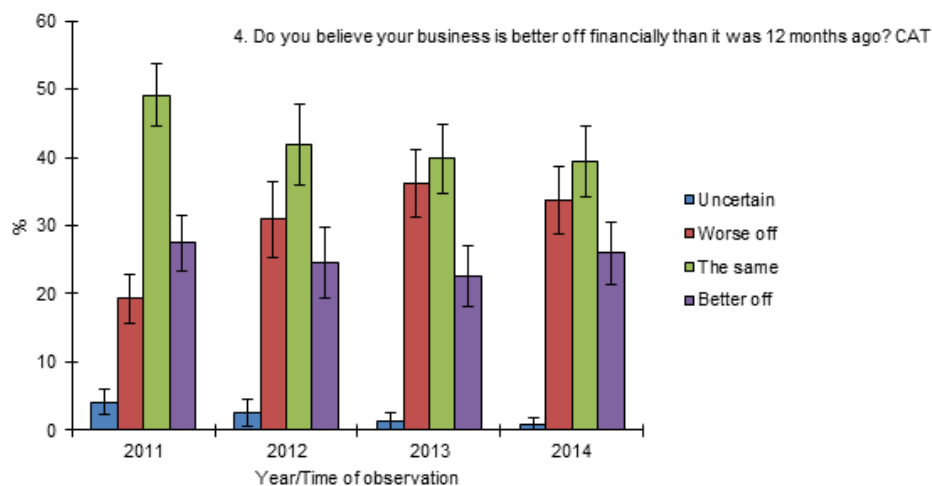
A highly statistically significant difference is evident (<0.000). Compared to similar businesses in other regional cities in Victoria, there has been a continual and significant decline in the proportion of businesses who believe they are faring good or excellent (63% in 2011 to 49% in 2014), with a concordant increase in those who believe that they are faring worse (Fair or Poor 11% in 2011 to 21% in 2014) (Chi-square 36.14, DF 9, p-value = <0.000)

Rating business financial position

Is the stated financial positions of businesses significantly altering over the last four years?

4. Do you believe your business is better off financially than it was 12 months ago? CAT					
	All	Uncertain	Worse off	The same	Better off
All	100	2.38	29.14	43.12	25.37
2011	100	4.11	19.26	49.13	27.49
2012	100	2.64	30.94	41.89	24.53
2013	100	1.41	36.16	39.83	22.60
2014	100	0.86	33.71	39.43	26.00

Table: % of row



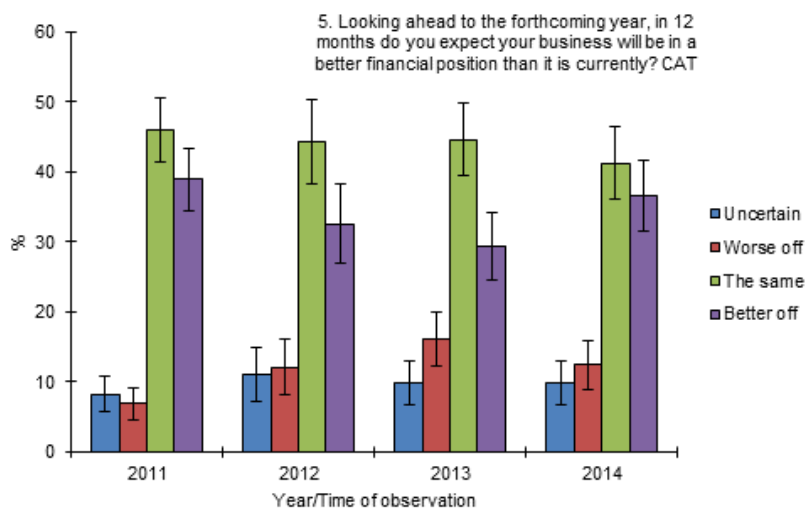
95% confidence intervals for row totals are presented

A statistically significant difference is evident (Chi-square 42.96, DF 9, p-value < 0.000). A significantly higher proportion of businesses indicate that they feel worse off (19% in 2011 compared to 31% in 2012, 36% in 2013 and 34% in 2014). Significantly fewer businesses indicate that are the same as they were in 2011 (49% in 2011 compared to 39% in 2014), however, there is no change from last year (40% in 2013). Overall, there is no change in how businesses perceive themselves financially from last year to this year.

Comparing previous 12 month business expectations to expectations for the next 12 months.

5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT					
	All	Uncertain	Worse off	The same	Better off
All	100	9.52	11.48	44.19	34.80
2011	100	8.21	6.91	46.00	38.88
2012	100	10.98	12.12	44.32	32.58
2013	100	9.89	16.10	44.63	29.38
2014	100	9.80	12.39	41.21	36.60

Table: % of row



95% confidence intervals for row totals are presented

There was a significant increase in those indicating worse off from 2011 to 2013 (Chi-square 22.60, DF 6, p-value < 0.000), however, there has been no change from last year to this (Chi-square 4.94, DF 3, p-value 0.18). It is noted that a far greater proportion of respondents indicate better off (36.6%) compared to worse off (12.39%)

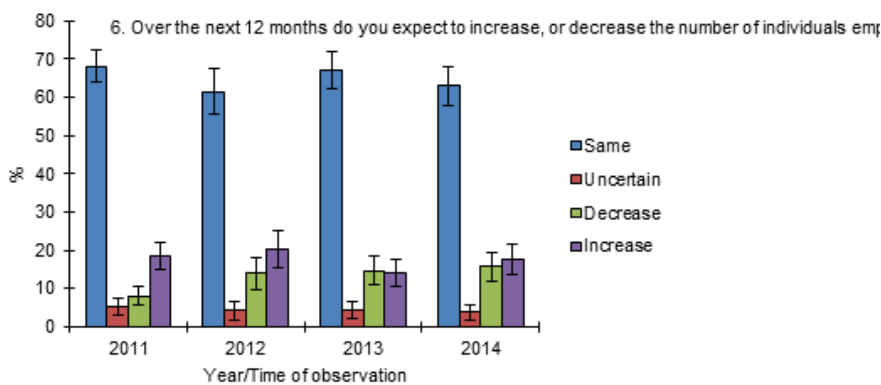
Hiring Expectations

Comparing hiring expectations between 2011, 2012, 2013 and 2014

6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT					
	All	Same	Uncertain	Decrease	Increase
All	100	65.38	4.43	12.60	17.59
2011	100	68.11	5.21	8.03	18.66
2012	100	61.51	4.15	13.96	20.38
2013	100	67.14	4.29	14.57	14.00
2014	100	62.90	3.77	15.65	17.68

Table: % of row

Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool



95% confidence intervals for row totals are presented

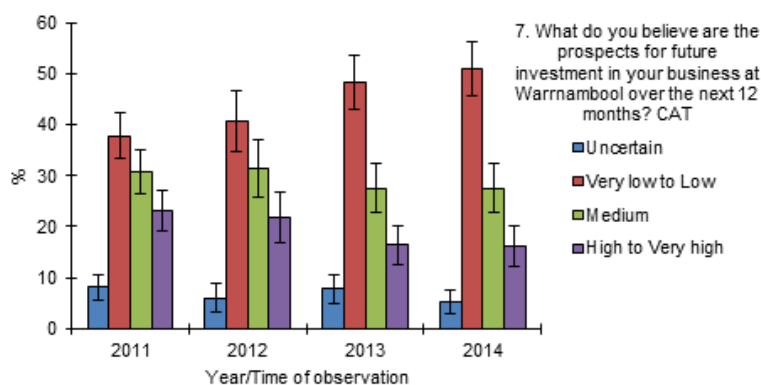
A statistically significant difference is evident in expected staffing levels for 2011 compared to the expected staffing levels for 2013 (Chi-square 14.77, DF 6, p-value = 0.022), however, there has been no significant change in these expectations from 2013 to 2014 and although 18% of organisations are expecting to increase staffing levels, currently most organisations (approximately 63% of them), expect staffing levels to remain unchanged.

Investment Prospects

Comparing perceived investment prospects over the period 2011, 2012, 2013 and 2014

	7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT				
	All	Uncertain	Very low to Low	Medium	High to Very high
All	100	6.93	44.17	29.33	19.58
2011	100	8.10	37.86	30.85	23.19
2012	100	6.04	40.75	31.32	21.89
2013	100	7.76	48.28	27.59	16.38
2014	100	5.22	51.01	27.54	16.23

Table: % of row



95% confidence intervals for row totals are presented

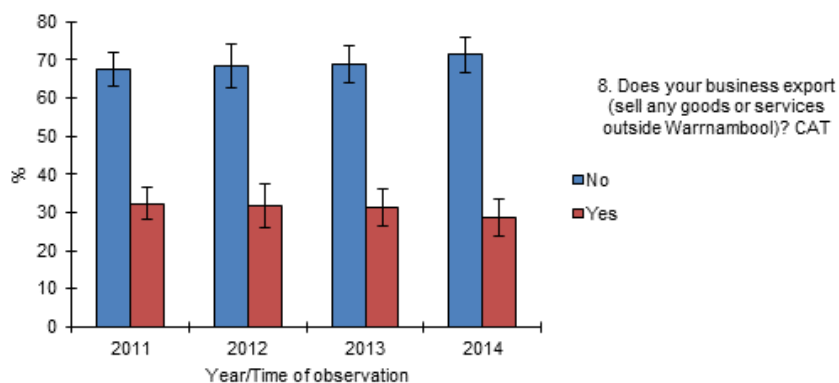
A significantly worsening trend in the expectations of organisations when assessing their perceived prospects for future investment is apparent when comparing across years (Chi-square 21.85, DF 9, p-value = 0.009). For example, in 2011 it was considered to be approximately 38% yet now 51% of organisations consider their prospects low to very low. Similarly in 2011, 23% of organisations viewed future investment prospects as high to very high and this estimate has now significantly fallen to 16%.

Export Activities and Prospects

Is there a difference evident between the number of businesses who expected to export goods and services over the period 2011, 2012, 2013 and 2014?

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	No	Yes
All	100	68.91	31.09
2011	100	67.62	32.38
2012	100	68.32	31.68
2013	100	68.66	31.34
2014	100	71.30	28.70

Table: % of row



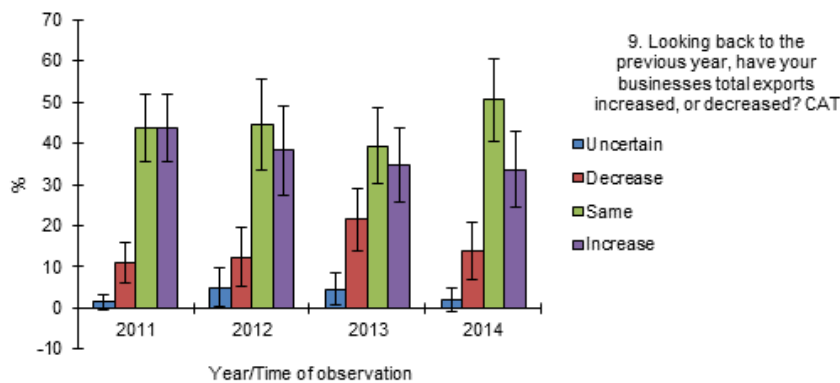
95% confidence intervals for row totals are presented

No statistically significant difference is evident between the four years of measurement (Chi-square 1.33, DF 3, p-value = 0.723). That is, the number of respondents who export has remained proportionally unaltered and sits at approximately, 31%. (Note: Least Squares Regression did not detect a difference in a reducing export proportion).

Is the amount of goods and services that is exported, changing over the years (2011 – 2014)?

	9. Looking back to the previous year, have your businesses total exports increased, or decreased? CAT				
	All	Uncertain	Decrease	Same	Increase
All	100	2.95	14.55	44.32	38.18
2011	100	1.37	10.96	43.84	43.84
2012	100	4.94	12.35	44.44	38.27
2013	100	4.46	21.43	39.29	34.82
2014	100	1.98	13.86	50.50	33.66

Table: % of row



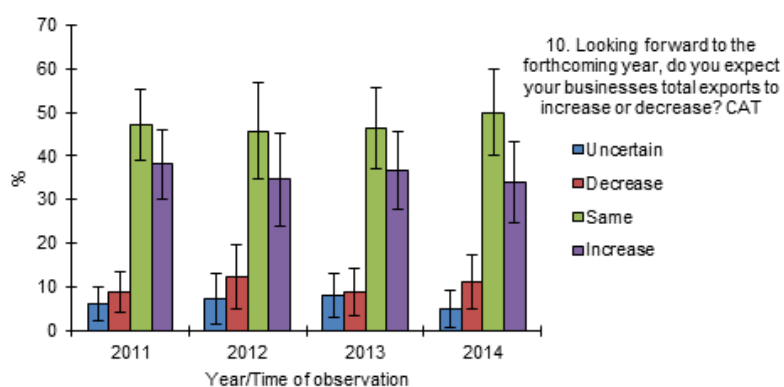
95% confidence intervals for row totals are presented

Although businesses that experienced a decrease in exports in 2010 (11%) was higher in 2012 (21%) There is insufficient evidence to suggest a significant change from 2012 to 2013 (Chi-square 12.36, DF 9, p-value 0.194). Most businesses (50% of them), are exporting the same amount as they were last year.

Do you expect the amount of goods and services you export to change in the year to come?

10. Looking forward to the forthcoming year, do you expect your businesses total exports to increase or decrease? CAT					
	All	Uncertain	Decrease	Same	Increase
All	100	6.59	10.00	47.27	36.14
2011	100	6.12	8.84	46.94	38.10
2012	100	7.41	12.35	45.68	34.57
2013	100	8.04	8.93	46.43	36.61
2014	100	5.00	11.00	50.00	34.00

Table: % of row



95% confidence intervals for row totals are presented

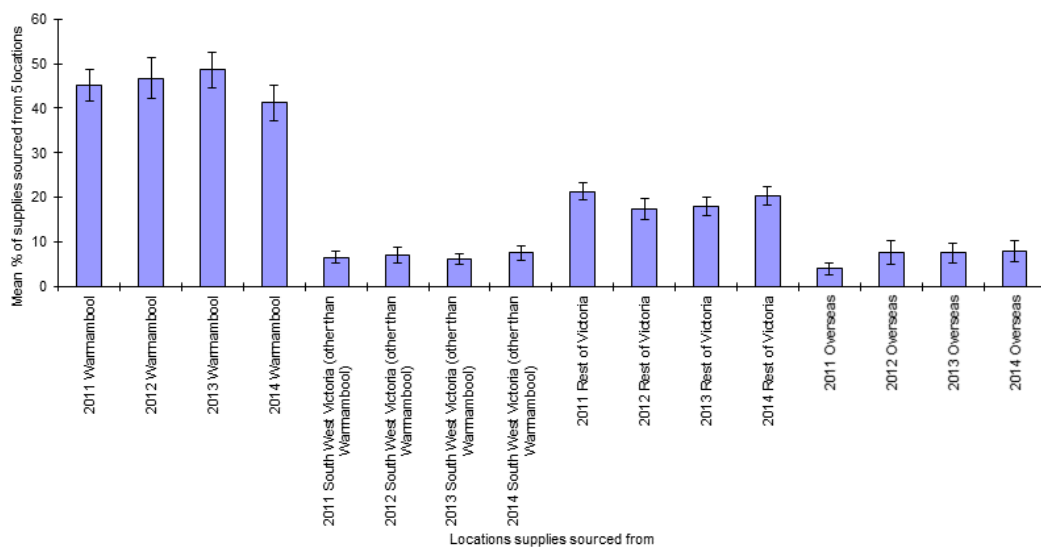
No significant differences are evident (Chi-square 2.31, DF 9, p-value = 0.982). That is, 10%, 47% and 37% of organisations expect their total exports to decrease, stay the same or increase respectively. Importantly, a high percentage of organisations continue to expect an increase in exports (36%).

Sourcing Supplies and Sales Patterns

Has there been a shift in where businesses source their supplies?

Locations supplies sourced from	All	2011 Warrnambool	2012 Warrnambool	2013 Warrnambool	2014 Warrnambool	2011 South West Victoria (other than Warrnambool)	2012 South West Victoria (other than Warrnambool)	2013 South West Victoria (other than Warrnambool)	2014 South West Victoria (other than Warrnambool)	2011 Rest of Victoria	2012 Rest of Victoria	2013 Rest of Victoria	2014 Rest of Victoria	2011 Overseas	2012 Overseas	2013 Overseas	2014 Overseas
Number	7169	463	266	354	351	463	266	354	351	926	532	708	702	463	266	354	350
Mean	19.55	45.15	46.76	48.62	41.17	6.57	7.09	6.15	7.50	21.36	17.49	17.90	20.36	4.04	7.67	7.51	7.89
St Dev	30.48	38.03	38.11	38.43	37.10	15.02	15.39	12.58	16.11	29.55	27.62	26.87	28.06	14.71	21.56	21.60	22.20
Skew	1.50	0.14	0.04	-0.03	0.26	3.50	3.36	3.43	3.36	1.39	1.65	1.65	1.42	4.55	3.13	3.19	3.16
Min	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Q ₁	0	5	5	5	5	0	0	0	0	0	0	0	0	0	0	0	0
Median	0	50	50	50	30	0	0	0	0	5	1	5	10	0	0	0	0
Q ₃	25	80	85	90	80	5	10	10	10	30	25	25	30	0	0	0	0
Max	100	100	100	100	100	100	100	99	100	100	100	100	100	100	100	100	100

Mean % of supplies sourced from the 5 locations

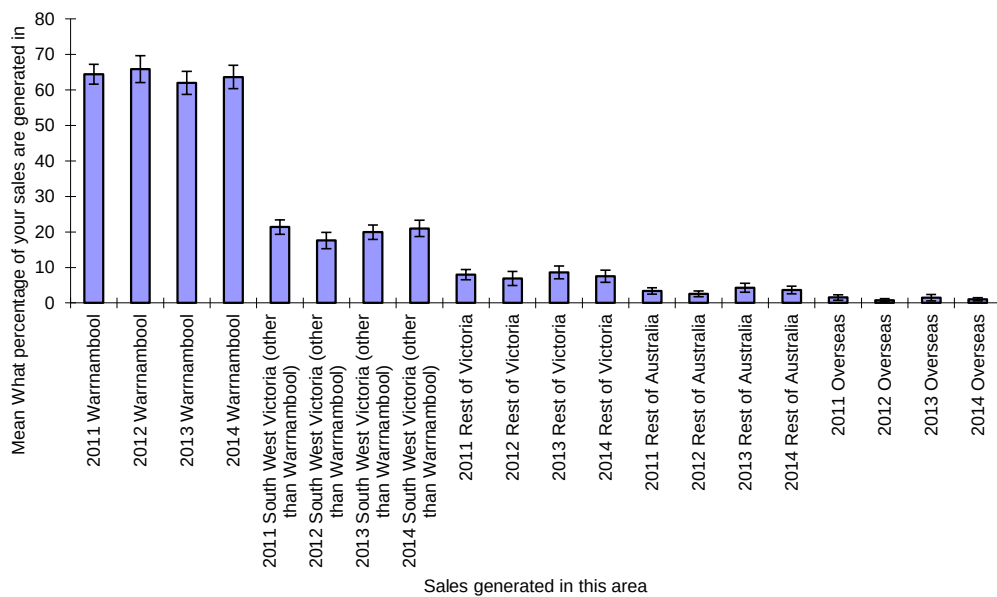


Error bars indicate a 95% confidence intervals for the estimate.

The significant increase in the proportion of supplies purchased from overseas witnessed between 2011 and 2012 (increasing from 4% to 8%) has not changed from 2012 to 2014 and continues to sit at around 8% in 2014. This year, there has been a significant reduction in the amount of supplies businesses are sourcing locally, dropping from 49% in 2013 to 41% in 2014 (t 2.62, p-value 0.009).

Has there been a shift in where businesses generate their sales between the years 2012 and 2014 (Warrnambool and SW Vic, Rest of Victoria, Rest of Australia, Overseas)?

Sales generated in this area	All	2011 Warrnambool	2012 Warrnambool	2013 Warrnambool	2014 Warrnambool	2011 South West Victoria (other than Warrnambool)	2012 South West Victoria (other than Warrnambool)	2013 South West Victoria (other than Warrnambool)	2014 South West Victoria (other than Warrnambool)	2011 Rest of Victoria	2012 Rest of Victoria	2013 Rest of Victoria	2014 Rest of Victoria
Number	7170	463	266	354	351	463	266	354	351	463	266	354	351
Mean	19.35	64.44	65.87	61.97	63.66	21.38	17.60	19.93	20.99	7.97	6.91	8.63	7.55
St Dev	30.05	30.69	31.24	31.01	31.05	21.92	18.84	19.68	21.78	16.16	16.19	17.40	16.38
Skew	1.48	-0.76	-0.92	-0.72	-0.78	1.40	1.23	1.37	1.43	2.97	3.29	2.71	3.17
Min	0	0	0	0	0	0	0	0	0	0	0	0	0
Q1	0	50	50	50	50	0	0	2	2	0	0	0	0
Median	0	70	75	70	70	20	10	20	15	0	0	0	0
Q3	30	90	90	90	90	30	27.25	30	30	10	5	10	5
Max	100	100	100	100	100	100	80	98	100	100	92	95	100
Sales generated in this area		2011 Rest of Australia	2012 Rest of Australia	2013 Rest of Australia	2014 Rest of Australia	2011 Overseas	2012 Overseas	2013 Overseas	2014 Overseas				
Number		463	266	354	351	463	266	354	351				
Mean		3.38	2.56	4.30	3.63	1.53	0.77	1.48	1.06				
St Dev		10.18	6.90	12.35	10.45	8.26	3.80	8.36	4.23				
Skew		4.73	3.69	4.52	4.23	8.32	7.18	9.00	5.49				
Min		0	0	0	0	0	0	0	0				
Q1		0	0	0	0	0	0	0	0				
Median		0	0	0	0	0	0	0	0				
Q3		0	0.75	2	0	0	0	0	0				
Max		90	40	90	80	100	40	100	40				



Error bars indicate a 95% confidence intervals for the estimate.

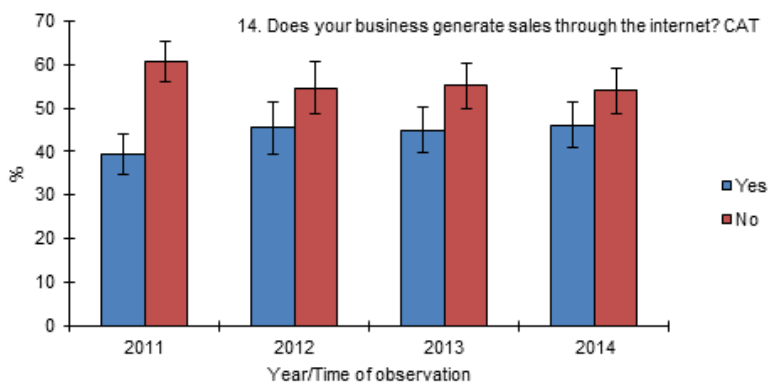
Within each location across the four years, there have been no significant changes in where organisations make their sales.

Application of the internet in Business

Is the proportion of overall sales generated from the internet changing?

	14. Does your business generate sales through the internet? CAT		
	All	Yes	No
All	100	43.51	56.49
2011	100	39.33	60.67
2012	100	45.45	54.55
2013	100	44.89	55.11
2014	100	46.06	53.94

Table: % of row



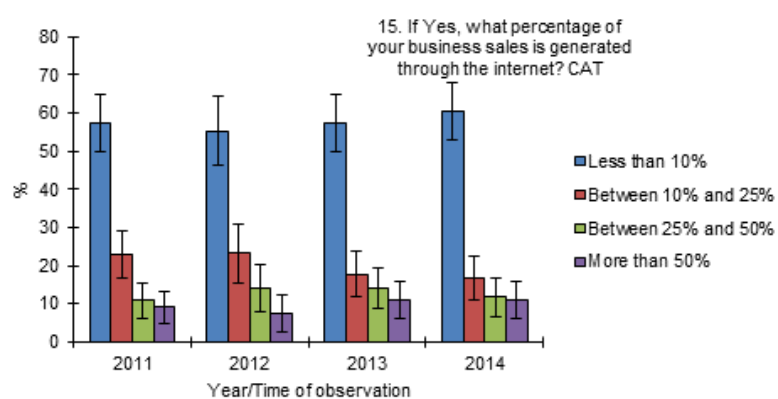
95% confidence intervals for row totals are presented

No statistically significant difference is evident (Chi-square 4.78, DF 3, p-value = 0.188). That is, the number of respondents who generated sales on the internet is not significantly different between 2011, 2012, 2013 and 2014 and sits on average, at approximately 44%.

The following analysis is a breakdown of those businesses who indicated that they do sell goods on the internet (indicating 'yes' in the previous analysis). For businesses overall, has there been a change in the percentage of sales generated on the internet over the last four years?

	15. If Yes, what percentage of your business sales is generated through the internet? CAT				
	All	Less than 10%	Between 10% and 25%	Between 25% and 50%	More than 50%
All	100	100	100	100	100
2011	28.25	28.06	32.26	24.36	26.23
2012	19.42	18.61	22.58	21.79	14.75
2013	26.32	26.11	23.39	29.49	29.51
2014	26	27.22	21.77	24.36	29.51

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

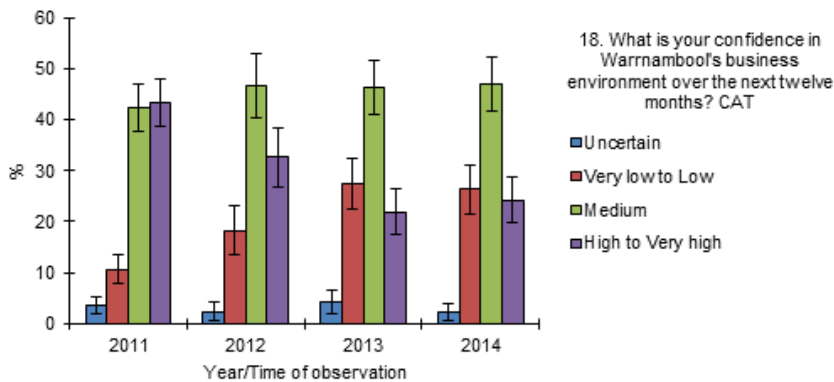
Concurring with the conclusion presented in the question above, no significant difference exists (Chi-square 5.26, DF 9, p-value = 0.811). That is, the breakdown of the proportion of sales generated by the internet has not changed in the last four years for businesses overall.

Has confidence in the Warrnambool business community changed over the last four years?

	18. What is your confidence in Warrnambool's business environment over the next twelve months? CAT				
	All	Uncertain	Very low to Low	Medium	High to Very high
All	100	3.22	19.99	45.24	31.55
2011	100	3.56	10.69	42.32	43.43
2012	100	2.39	18.33	46.61	32.67
2013	100	4.27	27.44	46.34	21.95
2014	100	2.37	26.33	47.04	24.26

Table: % of row

Comment [AP1]: Should the above table reconcile with the table on p.120?



95% confidence intervals for row totals are presented.

A significant difference is detected (Chi-square 75, DF 9, p-value < 0.000). The trend felt in reducing confidence from 2011 to 2013 has stabilised and businesses, although not as confident as they were 4 years ago, are no less confident this year compared to last year.

Comment [AP2]: There was no decrease in confidence from the previous year?

SECTION 2

The following section presents analysis of industry groups separately

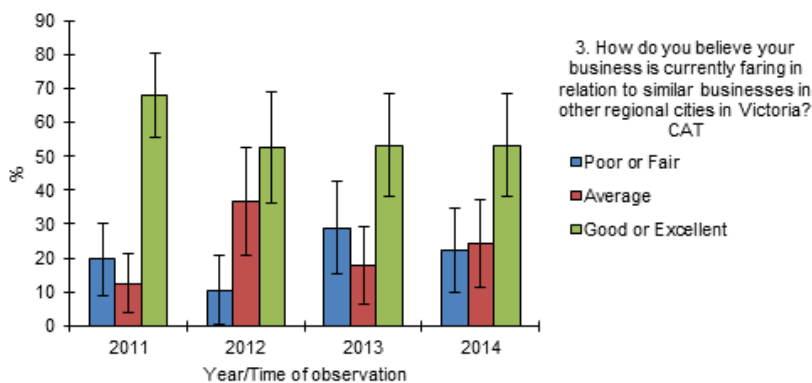
Rating business performance

Within the Accommodation, Hospitality & Food/ Beverage Services Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria, significantly altered?

For each of the four years 2011, 2012, 2013 and 2014 n = 56, 38, 45 and 45 respectively.

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT				
	All	Poor or Fair	Average	Good or Excellent
All	100	20.65	21.74	57.61
2011	100	19.64	12.50	67.86
2012	100	10.53	36.84	52.63
2013	100	28.89	17.78	53.33
2014	100	22.22	24.44	53.33

Table: % of row



95% confidence intervals for row totals are presented.

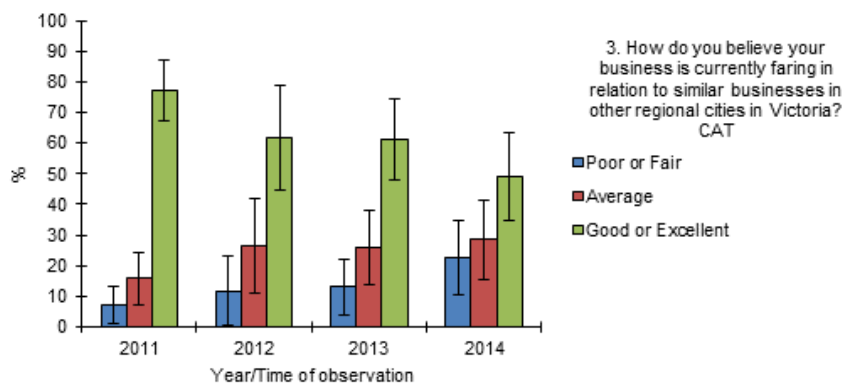
There has been no significant changes evident comparing this year to last year (Chi-square 11.6, DF 6, p-value = 0.07).

Within the Business Professional and Commercial Services Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria, significantly altered?

For each of the four years 2011, 2012, 2013 and 2014 n = 70, 34, 54 and 49 respectively.

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT				
	All	Poor or Fair	Average	Good or Excellent
All	100	13.04	23.19	63.77
2011	100	7.14	15.71	77.14
2012	100	11.76	26.47	61.76
2013	100	12.96	25.93	61.11
2014	100	22.45	28.57	48.98

Table: % of row



95% confidence intervals for row totals are presented

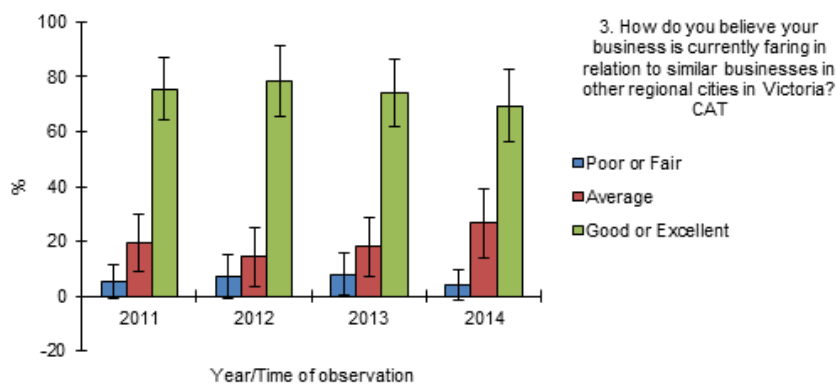
There is a significant difference evident ($z = 3.05$, $p\text{-value} = 0.002$). That is, comparing 2011 to 2014, there is now a significantly lower proportion of businesses that consider themselves to be performing “good or excellent” when comparing themselves to similar businesses in other regional cities of Victoria. This proportion has fallen by 28%, from 77% in 2011 to 49% in 2014.

Within the Government, Education and Community Services Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria significantly altered?

For each of the four years 2011, 2012 and 2013, n = 57, 42, 50 and 49 respectively.

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT				
	All	Poor or Fair	Average	Good or Excellent
All	100	6.06	19.70	74.24
2011	100	5.26	19.30	75.44
2012	100	7.14	14.29	78.57
2013	100	8.00	18.00	74.00
2014	100	4.08	26.53	69.39

Table: % of row



95% confidence intervals for row totals are presented

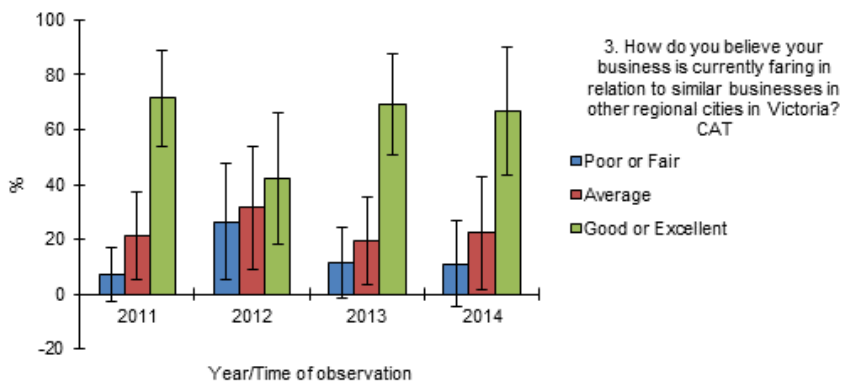
There is no evidence to suggest a change in perception. (Chi-square 5.70, DF 9, p-value 0.769). On average, 4%, 27% and 69% of the Government, Education and Community Services Industry Group currently perceive their comparative performance as Fair to Poor, Average and Good or Excellent respectively.

Within the Manufacturing, Transport and Storage Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria, significantly altered?

For each of the four years 2011, 2012, 2013 and 2014, n = 28, 19, 26 and 18 respectively.

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT				
	All	Poor or Fair	Average	Good or Excellent
All	100	13.19	23.08	63.74
2011	100	7.14	21.43	71.43
2012	100	26.32	31.58	42.11
2013	100	11.54	19.23	69.23
2014	100	11.11	22.22	66.67

Table: % of row



95% confidence intervals for row totals are presented.

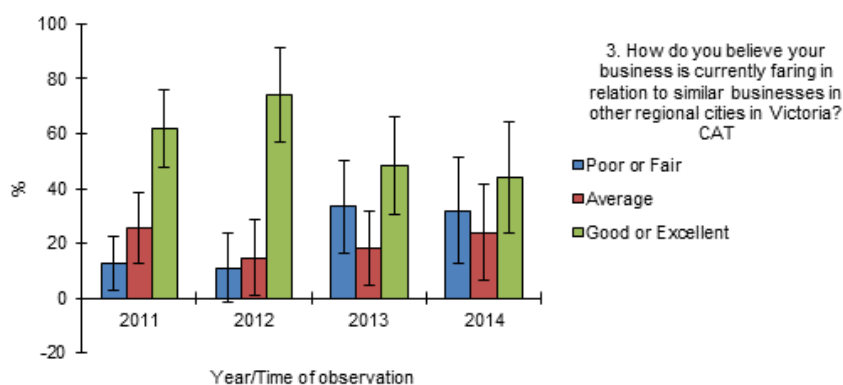
There is insufficient evidence to suggest any change in opinion within the Manufacturing, Transport and Storage Industry Group from last year to this year.

Within the Other Services Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria, significantly altered?

For each of the four years 2011, 2012, 2013 and 2014, n = 47, 27, 33 and 25 respectively.

	3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT			
	All	Poor or Fair	Average	Good or Excellent
All	100	21.21	21.21	57.58
2011	100	12.77	25.53	61.70
2012	100	11.11	14.81	74.07
2013	100	33.33	18.18	48.48
2014	100	32.00	24.00	44.00

Table: % of row



95% confidence intervals for row totals are presented

There is a significant difference between the proportion that indicated Good or Excellent in 2012 (74%) and the proportion who indicated Good or Excellent in 2014 (44%). That is, since 2012 within the Other Services Industry Group, there are fewer (30% of them) who think they are faring better than other regional cities in Victoria.

Within the Primary Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria, significantly altered?

For each of the four years 2011, 2012, 2013 and 2014, n = 15, 6, 7 and 5 respectively.

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT				
	All	Poor or Fair	Average	Good or Excellent
All	100	21.21	30.30	48.48
2011	100	13.33	33.33	53.33
2012	100	16.67	33.33	50.00
2013	100	57.14	0.00	42.86
2014	100	0.00	60.00	40.00

Row wise % table

	All	Poor or Fair	Average	Good or Excellent
All	33	7	10	16
2011	15	2	5	8
2012	6	1	2	3
2013	7	4	0	3
2014	5	0	3	2

Count table

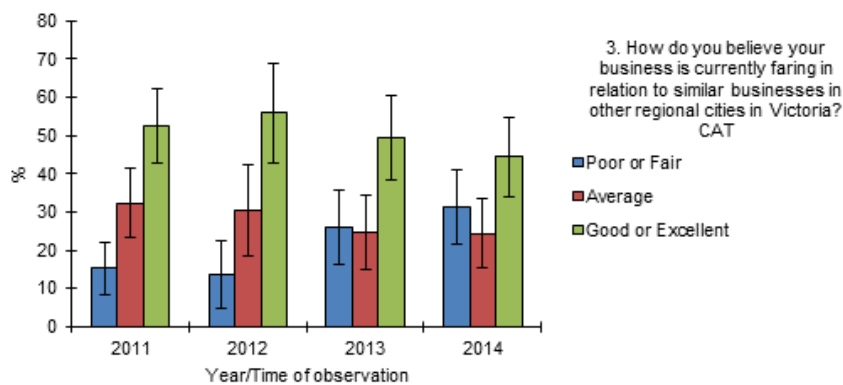
There is insufficient data in this industry group to make any claims. (See count table).

Within the Retail Trade Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria, significantly altered?

For each of the four years 2011, 2012, 2013 and 2014, n = 105, 59, 81 and 90 respectively.

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT				
	All	Poor or Fair	Average	Good or Excellent
All	100	21.79	28.06	50.15
2011	100	15.24	32.38	52.38
2012	100	13.56	30.51	55.93
2013	100	25.93	24.69	49.38
2014	100	31.11	24.44	44.44

Table: % of row



95% confidence intervals for row totals are presented

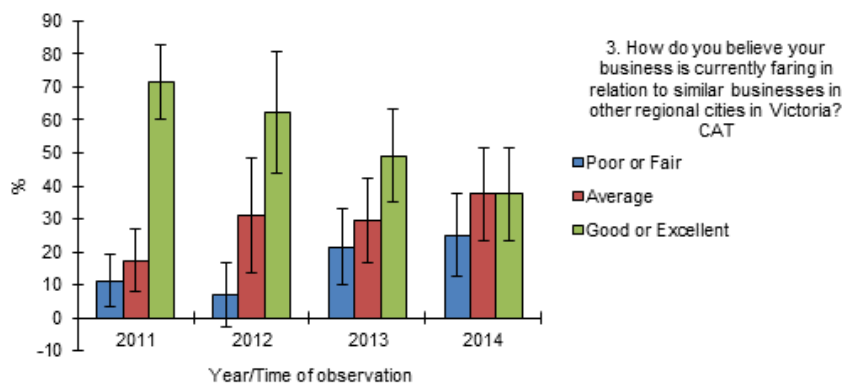
Compared to 2011 (15%) and 2012 (14%), the Retail Trade Industry Group now (2014) has a significantly higher proportion (31%) of traders that indicate they are operating Poor or Fair in comparison to similar businesses in other regional cities in Victoria (z 2.54, p-value 0.01).

Within the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industry Group, has the perception of current business performance compared to similar businesses in other regional cities in Victoria, significantly altered?

For each of the four years 2011, 201, 2013 and 2014, n = 63, 29, 51 and 48 respectively.

3. How do you believe your business is currently faring in relation to similar businesses in other regional cities in Victoria? CAT				
	All	Poor or Fair	Average	Good or Excellent
All	100	16.75	27.75	55.50
2011	100	11.11	17.46	71.43
2012	100	6.90	31.03	62.07
2013	100	21.57	29.41	49.02
2014	100	25.00	37.50	37.50

Table: % of row



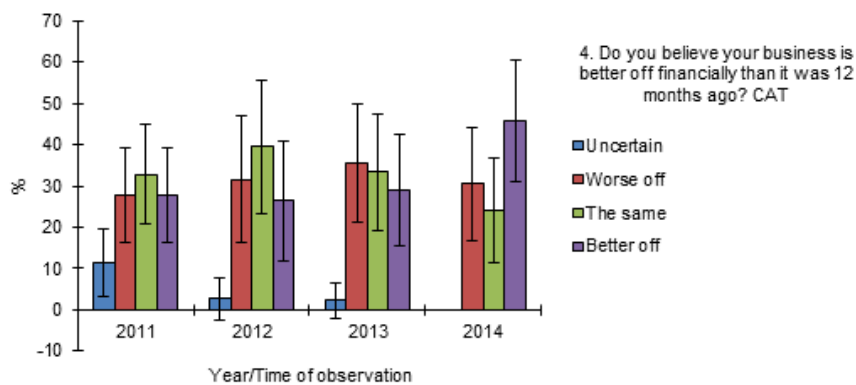
95% confidence intervals for row totals are presented

Within this industry type, a significant difference is evident (Chi-square 16.03, DF 6, p-value = 0.014). That is, opinions have significantly changed between 2011 and 2014, indicating a perceived reduction in comparative success. For example, in 2011, 71% of this industry group indicated they were doing “good or excellent” in comparison to other regional cities, this has now fallen by 41% to 30%.

Within the Accommodation, Hospitality & Food/ Beverage Services Industry Group, is there an overall change in their belief regarding their financial position?

	4. Do you believe your business is better off financially than it was 12 months ago? CAT				
	All	Uncertain	Worse off	The same	Better off
All	100	4.74	31.05	32.11	32.11
2011	100	11.48	27.87	32.79	27.87
2012	100	2.63	31.58	39.47	26.32
2013	100	2.22	35.56	33.33	28.89
2014	100	0.00	30.43	23.91	45.65

Table: % of row



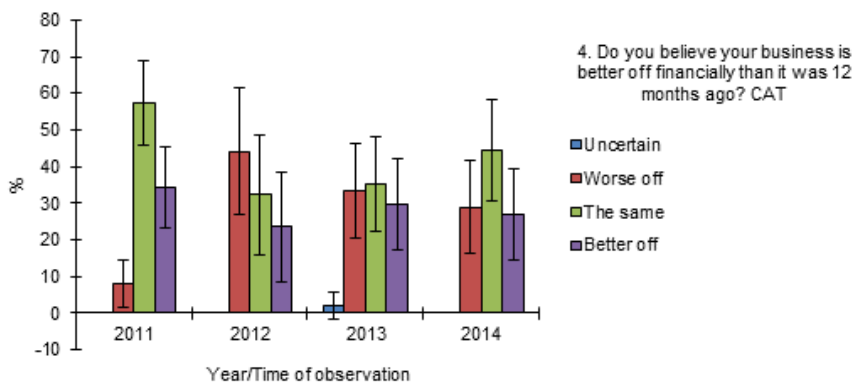
Column chart: 95% confidence intervals for row totals are presented.

No significant differences in a change of opinion is evident within the Accommodation, Hospitality & Food/Beverage Services Industry Group, (Chi-square 14.6, DF 9, p-value = 0.10). This year, no respondents indicated that they were uncertain.

Within the Business Professional and Commercial Services Industry Group, is there an overall change in their belief regarding their financial position?

	4. Do you believe your business is better off financially than it was 12 months ago? CAT				
	All	Uncertain	Worse off	The same	Better off
All	100	0.47	25.35	44.60	29.58
2011	100	0.00	8.22	57.53	34.25
2012	100	0.00	44.12	32.35	23.53
2013	100	1.85	33.33	35.19	29.63
2014	100	0.00	28.85	44.23	26.92

Table: % of row

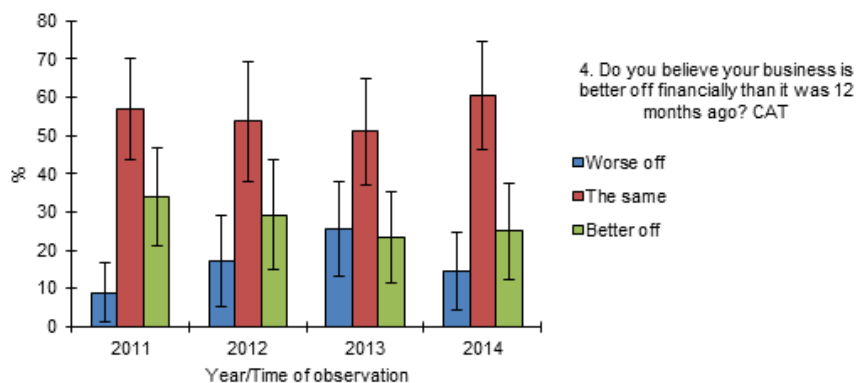


A significant difference is evident (Chi-square 23.7, DF 9, p-value < 0.005). Specifically, a significantly higher proportion of organisations within this industry group indicated that they were worse off financially (8% in 2011 compared to 29% in 2014). There has been no significant change in opinion within the Business Professional and Commercial Services Industry Group from 2013 to 2014.

Within the Government, Education and Community Services Industry Group, is there an overall change in their belief regarding their financial position?

	4. Do you believe your business is better off financially than it was 12 months ago? CAT			
	All	Worse off	The same	Better off
All	100	16.33	55.61	28.06
2011	100	8.93	57.14	33.93
2012	100	17.07	53.66	29.27
2013	100	25.49	50.98	23.53
2014	100	14.58	60.42	25.00

Table: % of row



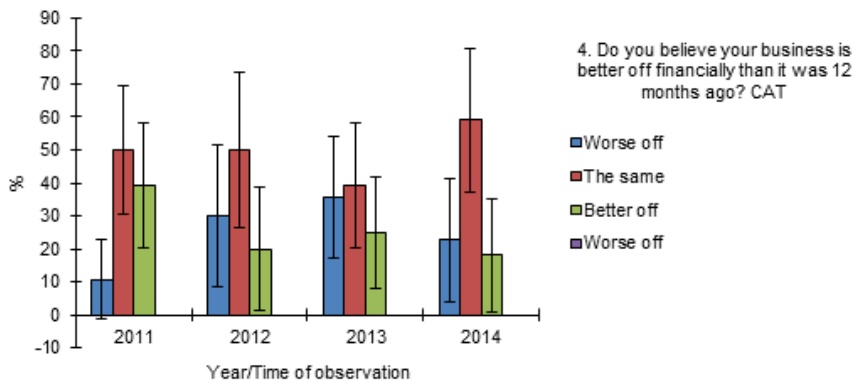
Column chart: 95% confidence intervals for row totals are presented.

No significant differences in a change of opinion within the Government, Education and Community Services Industry Group is evident (Chi-square 6.29, DF 6, p-value = 0.39).

Within the Manufacturing, Transport and Storage Industry Group, is there an overall change in their belief regarding their financial position?

	4. Do you believe your business is better off financially than it was 12 months ago? CAT			
	All	Worse off	The same	Better off
All	100	24.49	48.98	26.53
2011	100	10.71	50.00	39.29
2012	100	30.00	50.00	20.00
2013	100	35.71	39.29	25.00
2014	100	22.73	59.09	18.18

Table: % of row



Column

chart: 95% confidence intervals for row totals are presented.

No significant differences in a change of opinion within the Manufacturing, Transport and Storage Industry Group is evident (Chi-square 7.5, DF 6, p-value = 0.27).

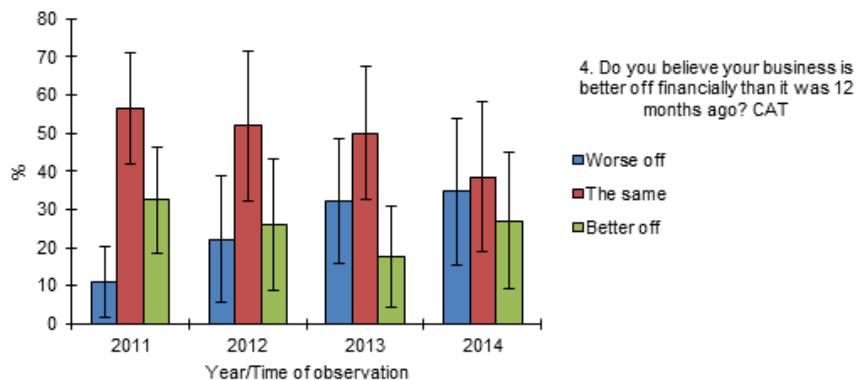
Within the Other Services Industry Group, is there an overall change in their belief regarding their financial position?

4. Do you believe your business is better off financially than it was 12 months ago? CAT				
	All	Worse off	The same	Better off
All	100	23.31	50.38	26.32
2011	100	10.87	56.52	32.61
2012	100	22.22	51.85	25.93
2013	100	32.35	50.00	17.65
2014	100	34.62	38.46	26.92

Table: % of row

	All	Worse off	The same	Better off
All	133	31	67	35
2011	46	5	26	15
2012	27	6	14	7
2013	34	11	17	6
2014	26	9	10	7

Count table



Column chart: 95% confidence intervals for row totals are presented.

No significant change is evident between any response group (Chi-square 8.44, DF 6 p-value = 0.207), however, in order to identify if an increasing trend in the proportion of respondents who indicated 'worse off', or alternatively a decreasing trend in the proportion of those respondents who indicated 'better off', a simple linear regression model was investigated. Although the model is recognised as being not particularly robust (n=4), both trends were identified as significant. That is, the proportion of respondents who indicate 'worse off' appears to be increasing over time, and similarly, the proportion of respondents who indicate 'better off', appears to be decreasing over time.

Within the Primary Industries Group, is there an overall change in their belief regarding their financial position?

	4. Do you believe your business is better off financially than it was 12 months ago? CAT			
	All	Worse off	The same	Better off
All	100	41.94	25.81	32.26
2011	100	35.71	21.43	42.86
2012	100	40.00	40.00	20.00
2013	100	57.14	28.57	14.29
2014	100	40.00	20.00	40.00

Table: % of row

	All	Worse off	The same	Better off
All	31	13	8	10
2011	14	5	3	6
2012	5	2	2	1
2013	7	4	2	1
2014	5	2	1	2

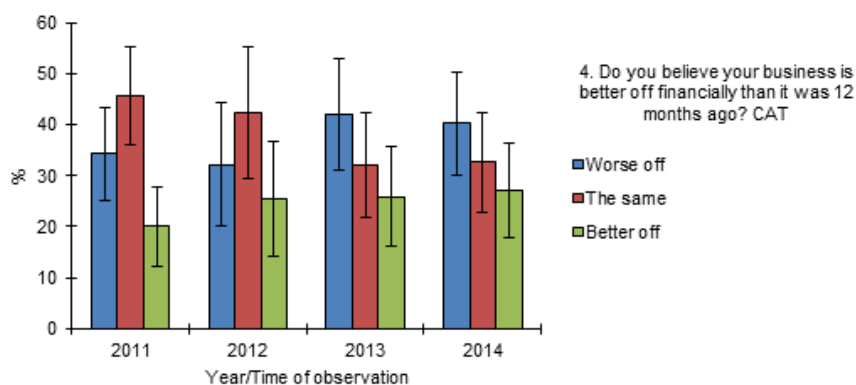
Count table

There is insufficient evidence to detect any change.

Within the Retail Trade Industry Group, is there an overall change in their belief regarding their financial position?

	4. Do you believe your business is better off financially than it was 12 months ago? CAT			
	All	Worse off	The same	Better off
All	100	37.39	38.28	24.33
2011	100	34.29	45.71	20.00
2012	100	32.20	42.37	25.42
2013	100	41.98	32.10	25.93
2014	100	40.22	32.61	27.17

Table: % of row



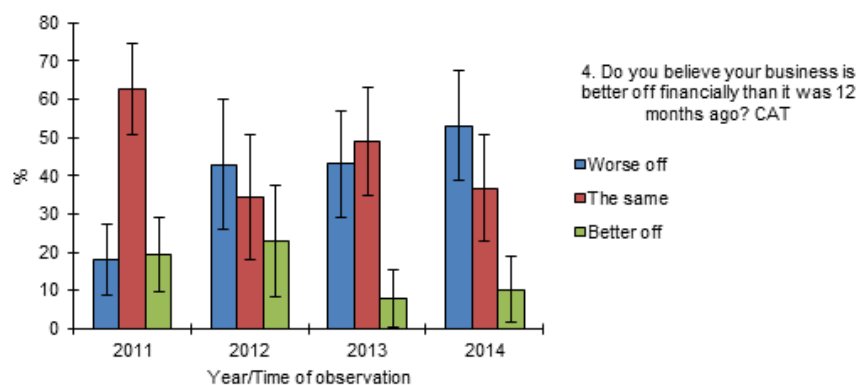
Column chart: 95% confidence intervals for row totals are presented.

No significant change is evident (Chi-square 5.93, DF 6, p-value = 0.431).

Within the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industry Group, is there an overall change in their belief regarding their financial position?

4. Do you believe your business is better off financially than it was 12 months ago? CAT				
	All	Worse off	The same	Better off
All	100	37.13	48.02	14.85
2011	100	17.91	62.69	19.40
2012	100	42.86	34.29	22.86
2013	100	43.14	49.02	7.84
2014	100	53.06	36.73	10.20

Table: % of row



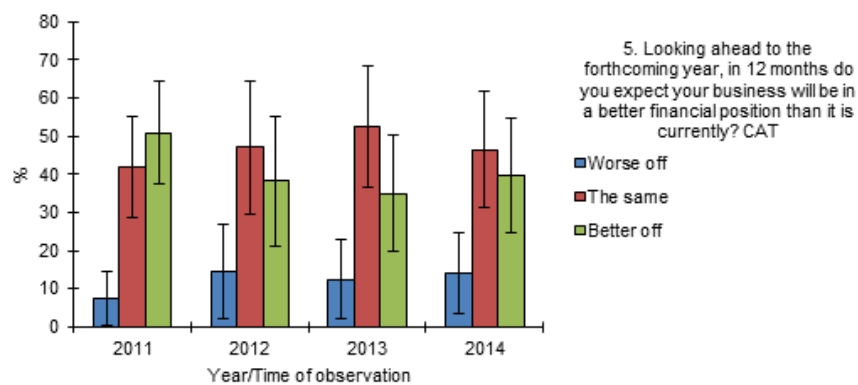
Column chart: 95% confidence intervals for row totals are presented.

A significantly higher proportion of service trades, electricity, gas, construction and wholesale trade industry organisations believe they were financially worse off, 18% in 2011 compared to 43% in 2013, with this trend continuing to rise in 2014 (now sitting at 53%).

Within the Accommodation, Hospitality & Food/ Beverage Services Industry Group, is there an overall difference in financial expectations?

	5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT			
	All	Worse off	The same	Better off
All	100	11.63	46.51	41.86
2011	100	7.27	41.82	50.91
2012	100	14.71	47.06	38.24
2013	100	12.50	52.50	35.00
2014	100	13.95	46.51	39.53

Table: % of row



There is no evidence of any significant change over the four years of measurement (Chi-square 3.66, DF 6, p-value = 0.723).

Within the Business Professional and Commercial Services Industry Group, is there an overall difference in financial expectations?

	5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT			
	All	Worse off	The same	Better off
All	100	8.37	41.87	49.75
2011	100	7.14	35.71	57.14
2012	100	10.00	43.33	46.67
2013	100	7.84	43.14	49.02
2014	100	9.62	48.08	42.31

Table: % of row

	All	Worse off	The same	Better off
All	203	17	85	101
2011	70	5	25	40
2012	30	3	13	14
2013	51	4	22	25
2014	52	5	25	22

Count table

There is insufficient evidence available to detect any significant change.

Within the Government, Education and Community Services Industry Group, is there an overall difference in financial expectations?

	5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT			
	All	Worse off	The same	Better off
All	100	8.99	50.79	40.21
2011	100	1.82	50.91	47.27
2012	100	7.89	60.53	31.58
2013	100	20.41	48.98	30.61
2014	100	6.38	44.68	48.94

Table: % of row

	All	Worse off	The same	Better off
All	189	17	96	76
2011	55	1	28	26
2012	38	3	23	12
2013	49	10	24	15
2014	47	3	21	23

Count table

There is insufficient evidence available to detect any significant change.

Within the Manufacturing, Transport and Storage Industry Group, is there an overall difference in financial expectations?

	5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT			
	All	Worse off	The same	Better off
All	100	10.75	54.84	34.41
2011	100	6.67	56.67	36.67
2012	100	15.00	40.00	45.00
2013	100	19.23	53.85	26.92
2014	100	0.00	70.59	29.41

Table: % of row

	All	Worse off	The same	Better off
All	93	10	51	32
2011	30	2	17	11
2012	20	3	8	9
2013	26	5	14	7
2014	17	0	12	5

Count table

There is insufficient evidence available to detect any significant change.

Within the Other Services Industry Group, is there an overall difference in financial expectations?

	5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT			
	All	Worse off	The same	Better off
All	100	8.13	45.53	46.34
2011	100	2.27	50.00	47.73
2012	100	11.11	48.15	40.74
2013	100	16.13	45.16	38.71
2014	100	4.76	33.33	61.90

Table: % of row

	All	Worse off	The same	Better off
All	123	10	56	57
2011	44	1	22	21
2012	27	3	13	11
2013	31	5	14	12
2014	21	1	7	13

Count table

There is insufficient evidence available to detect any significant change.

Within the Primary Industries Group, is there an overall difference in financial expectations?

	5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT			
	All	Worse off	The same	Better off
All	100	33.33	29.63	37.04
2011	100	26.67	26.67	46.67
2012	100	25.00	25.00	50.00
2013	100	40.00	40.00	20.00
2014	100	66.67	33.33	0.00

Table: % of row

	All	Worse off	The same	Better off
All	27	9	8	10
2011	15	4	4	7
2012	4	1	1	2
2013	5	2	2	1
2014	3	2	1	0

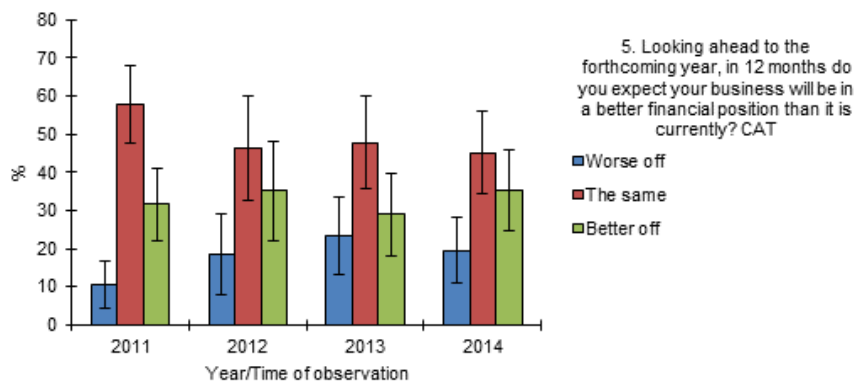
Count table

There is insufficient evidence available to detect any significant change.

Within the Retail Trade Industry Group, is there an overall difference in financial expectations?

	5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT			
	All	Worse off	The same	Better off
All	100	17.33	50.00	32.67
2011	100	10.53	57.89	31.58
2012	100	18.52	46.30	35.19
2013	100	23.19	47.83	28.99
2014	100	19.51	45.12	35.37

Table: % of row



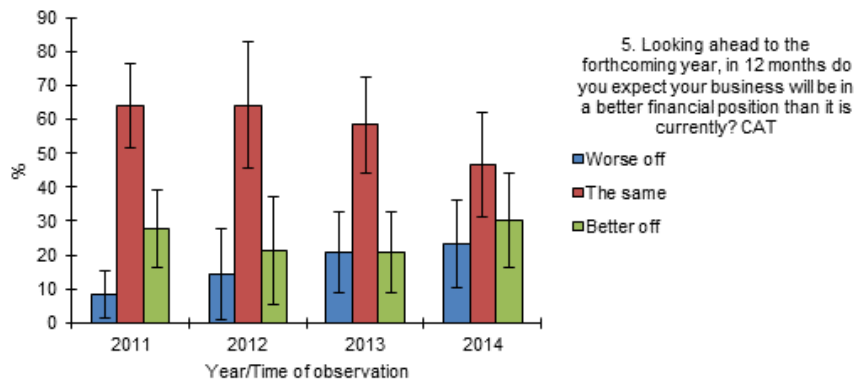
Column chart: 95% confidence intervals for row totals are presented.

No significant difference is detected (Chi-square 6.57, DF 6, p-value = 0.363). That is, opinions within the Retail Trade Industry Group are not significantly different across each of the four years of measurement.

Within the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industry Group, is there an overall difference in financial expectations?

5. Looking ahead to the forthcoming year, in 12 months do you expect your business will be in a better financial position than it is currently? CAT				
	All	Worse off	The same	Better off
All	100	16.11	58.33	25.56
2011	100	8.20	63.93	27.87
2012	100	14.29	64.29	21.43
2013	100	20.83	58.33	20.83
2014	100	23.26	46.51	30.23

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

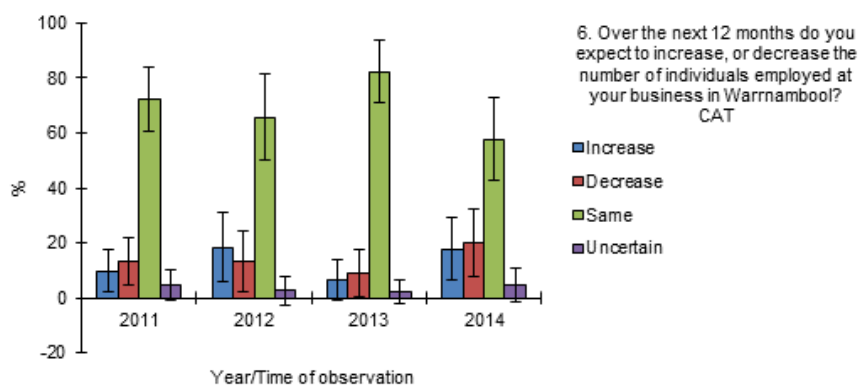
No significant difference is detected (Chi-square 10.9, DF 5, p-value = 0.301). That is, opinions within the service trades, electricity, gas, construction and wholesale trade Industry organisations are not significantly different between years.

Hiring Expectations

Within the Accommodation, Hospitality & Food/ Beverage Services Industry Group, is there an overall difference regarding employment intentions?

6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT				
	All	Decrease	Same	Increase
All	100	14.29	72.53	13.19
2011	100	13.79	75.86	10.34
2012	100	13.51	67.57	18.92
2013	100	9.09	84.09	6.82
2014	100	20.93	60.47	18.60

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

A significant difference is detected ($z = 2.53$, p -value 0.011). That is, the proportion who indicated that employment would be the same has fallen from 84% in 2013 to 60% this year.

Within the Business Professional and Commercial Services Industry Group, is there an overall difference regarding employment intentions?

	6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT			
	All	Decrease	Same	Increase
All	100	10.89	65.35	23.76
2011	100	5.71	64.29	30.00
2012	100	15.63	62.50	21.88
2013	100	11.76	68.63	19.61
2014	100	14.29	65.31	20.41

Table: % of row

	All	Decrease	Same	Increase
All	211	22	132	48
2011	73	4	45	21
2012	34	5	20	7
2013	54	6	35	10
2014	50	7	32	10

Count table

Column chart: 95% confidence intervals for row totals are presented.

There is insufficient evidence available to detect any significant change in intentions.

Within the Government, Education and Community Services Industry Group, is there an overall difference regarding employment intentions?

	6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT			
	All	Decrease	Same	Increase
All	100	6.70	68.04	25.26
2011	100	1.75	66.67	31.58
2012	100	7.32	68.29	24.39
2013	100	12.77	65.96	21.28
2014	100	6.12	71.43	22.45

Table: % of row

	All	Decrease	Same	Increase
All	194	13	132	49
2011	57	1	38	18
2012	41	3	28	10
2013	47	6	31	10
2014	49	3	35	11

Count table

There is insufficient evidence available to detect any significant change.

Within the Manufacturing, Transport and Storage Industry Group, is there an overall difference regarding employment intentions?

	6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT			
	All	Decrease	Same	Increase
All	100	13.19	69.23	17.58
2011	100	0.00	74.07	25.93
2012	100	23.53	64.71	11.76
2013	100	22.22	66.67	11.11
2014	100	10.00	70.00	20.00

Table: % of row

	All	Decrease	Same	Increase
All	91	12	63	16
2011	27	0	20	7
2012	17	4	11	2
2013	27	6	18	3
2014	20	2	14	4

Count table

There is insufficient evidence available to detect any significant change.

Within the Other Services Industry Group, is there an overall difference regarding employment intentions?

	6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT			
	All	Decrease	Same	Increase
All	100	7.20	69.60	23.20
2011	100	4.35	76.09	19.57
2012	100	7.69	65.38	26.92
2013	100	10.34	68.97	20.69
2014	100	8.33	62.50	29.17

Table: % of row

	All	Decrease	Same	Increase
All	125	9	87	29
2011	46	2	35	9
2012	26	2	17	7
2013	29	3	20	6
2014	24	2	15	7

There is insufficient evidence to determine if a significant difference exists.

Within the Primary Industries Group, is there an overall difference regarding employment intentions?

	6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT			
	All	Decrease	Same	Increase
All	100	10.00	80.00	10.00
2011	100	7.69	92.31	0.00
2012	100	0.00	83.33	16.67
2013	100	14.29	71.43	14.29
2014	100	25.00	50.00	25.00

Table: % of row

	All	Decrease	Same	Increase
All	30	3	24	3
2011	13	1	12	0
2012	6	0	5	1
2013	7	1	5	1
2014	4	1	2	1

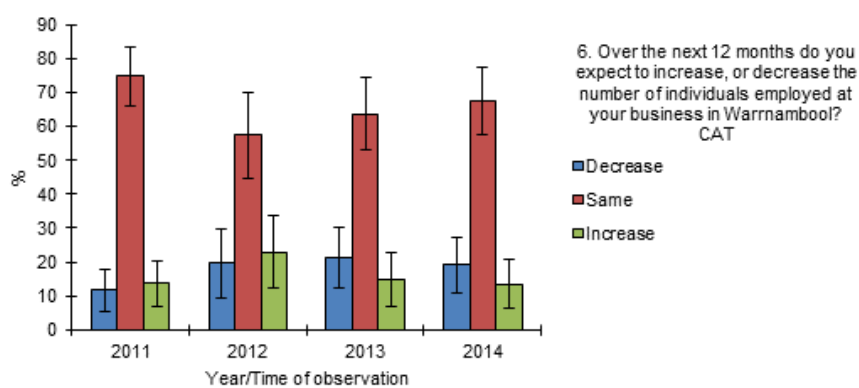
Count table

There is insufficient evidence to determine whether or not any significant change has taken place.

Within the Retail Trade Industry Group, is there an overall difference regarding employment intentions?

6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT				
	All	Decrease	Same	Increase
All	100	17.42	66.97	15.62
2011	100	11.65	74.76	13.59
2012	100	19.67	57.38	22.95
2013	100	21.25	63.75	15.00
2014	100	19.10	67.42	13.48

Table: % of row



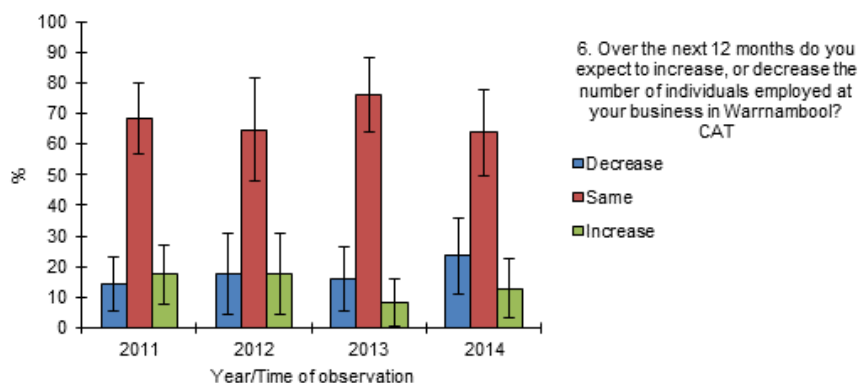
Column chart: 95% confidence intervals for row totals are presented.

No significant difference exists (Chi-square 7.51, DF 6, p-value = 0.276).

Within the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industry Group, is there an overall difference regarding employment intentions?

6. Over the next 12 months do you expect to increase, or decrease the number of individuals employed at your business in Warrnambool? CAT				
	All	Decrease	Same	Increase
All	100	17.53	68.56	13.92
2011	100	14.29	68.25	17.46
2012	100	17.65	64.71	17.65
2013	100	16.00	76.00	8.00
2014	100	23.40	63.83	12.77

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

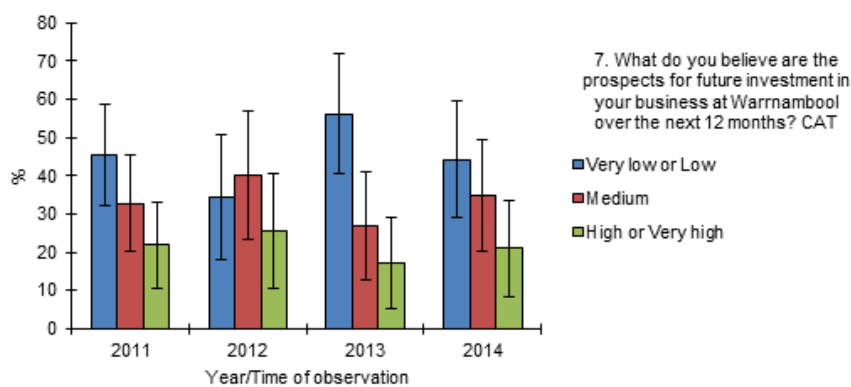
No significant difference exists (Chi-square 4.213, DF 6, p-value = 0.647).

Investment Prospects

Within the Accommodation, Hospitality & Food/ Beverage Services Industry Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

	7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT			
	All	Very low or Low	Medium	High or Very high
All	100	45.40	33.33	21.26
2011	100	45.45	32.73	21.82
2012	100	34.29	40.00	25.71
2013	100	56.10	26.83	17.07
2014	100	44.19	34.88	20.93

Table: % of row



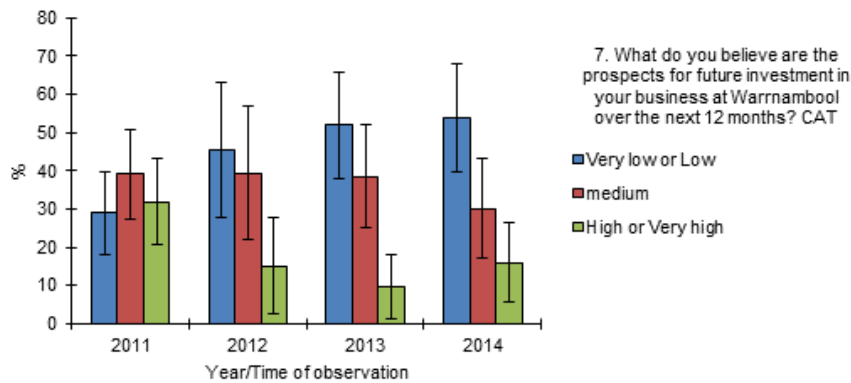
Column chart: 95% confidence intervals for row totals are presented.

No significant difference exists (Chi-square 3.69, DF 6, p-value = 0.717). That is, opinions regarding future investment in their business don't appear to have changed over the four years.

Within the Business Professional and Commercial Services Industry Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT				
	All	Very low or Low	medium	High or Very high
All	100	43.63	36.76	19.61
2011	100	28.99	39.13	31.88
2012	100	45.45	39.39	15.15
2013	100	51.92	38.46	9.62
2014	100	54.00	30.00	16.00

Table: % of row



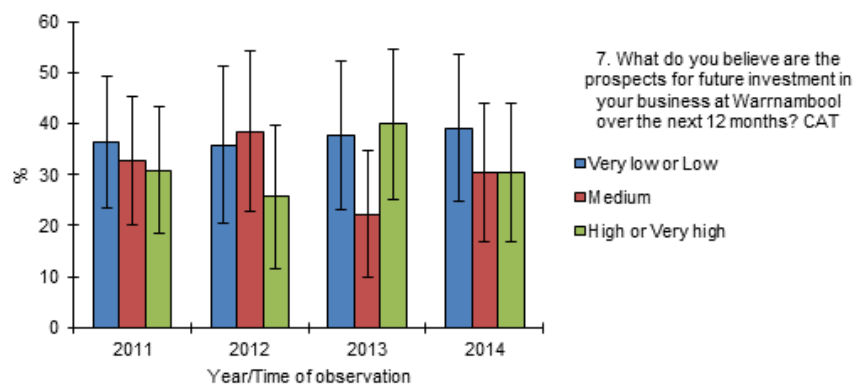
Column chart: 95% confidence intervals for row totals are presented.

A significant difference (Chi-square 14.9, DF 6, p-value =0.021) was detected in the proportion who indicated future investment in their business was high to very high, decreasing from 32% in 2011, to 10% in 2013. Similarly, the proportion of respondents who indicated very low to low, increased from 29% to 52% in this same time period. However, there has been no change from 2013 to 2014 in this industry group. Compared to those who indicated very low or low (29%) in 2011, there are now 54% of respondents providing this opinion.

Within the Government, Education and Community Services Industry Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

	7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT			
	All	Very low or Low	Medium	High or Very high
All	100	37.30	30.81	31.89
2011	100	36.36	32.73	30.91
2012	100	35.90	38.46	25.64
2013	100	37.78	22.22	40.00
2014	100	39.13	30.43	30.43

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

No significant difference exists (Chi-square 3.42, DF 6, p-value = 0.755). That is, opinions regarding future investment in their business are unlikely to have changed.

Within the Manufacturing, Transport and Storage Industry Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

	7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT			
	All	Very low or Low	Medium	High or Very high
All	100	43.75	32.29	23.96
2011	100	34.48	27.59	37.93
2012	100	42.11	31.58	26.32
2013	100	34.62	46.15	19.23
2014	100	68.18	22.73	9.09

Table: % of row

	All	Very low or Low	Medium	High or Very high
All	96	42	31	23
2011	29	10	8	11
2012	19	8	6	5
2013	26	9	12	5
2014	22	15	5	2

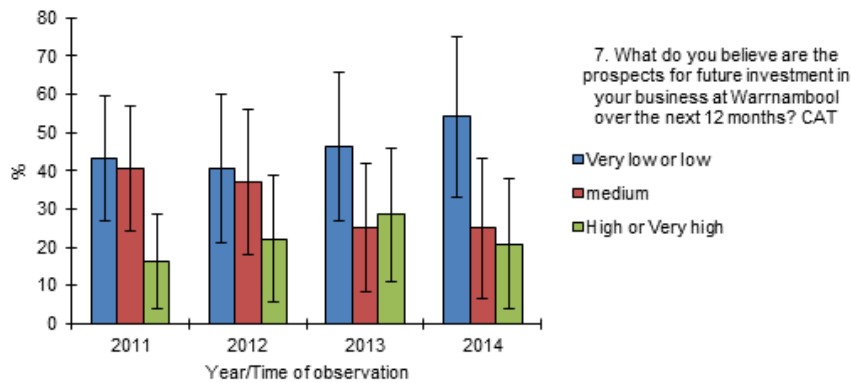
Count table

There is insufficient evidence to determine whether or not any significant change has taken place in this industry group.

Within the Other Services Industry Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT				
	All	Very low or low	medium	High or Very high
All	100	45.69	32.76	21.55
2011	100	43.24	40.54	16.22
2012	100	40.74	37.04	22.22
2013	100	46.43	25.00	28.57
2014	100	54.17	25.00	20.83

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

No significant difference exists (Chi-square 3.505, DF 6, p-value = 0.763). That is, opinions regarding future investment in their business do not appear to have changed over the four years.

Within the Primary Industries Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

	7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT			
	All	Very low or Low	Medium	High or Very high
All	100	51.61	29.03	19.35
2011	100	40.00	40.00	20.00
2012	100	40.00	40.00	20.00
2013	100	85.71	0.00	14.29
2014	100	50.00	25.00	25.00

Table: % of row

	All	Very low or Low	Medium	High or Very high
All	31	16	9	6
2011	15	6	6	3
2012	5	2	2	1
2013	7	6	0	1
2014	4	2	1	1

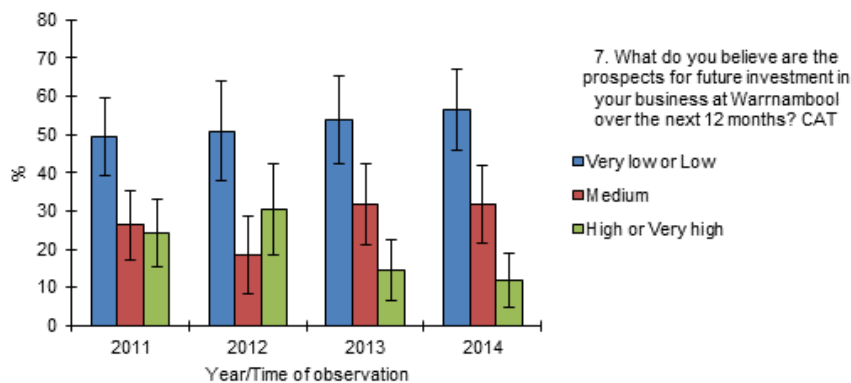
Count table

There are too few observations to draw any significant conclusions regarding change in prospects for future investment within the Primary Industries Group.

Within the Retail Trade Industry Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT				
	All	Very low or Low	Medium	High or Very high
All	100	52.70	27.62	19.68
2011	100	49.47	26.32	24.21
2012	100	50.85	18.64	30.51
2013	100	53.95	31.58	14.47
2014	100	56.47	31.76	11.76

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

No significant difference exists (Chi-square 6.26, DF 4, p-value = 0.180). That is, opinions regarding future investment in their business do not appear to have changed.

Within the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industry Group, has the believed future prospects for investment in their business changed over the period 2011, 2012, 2013 and 2014?

	7. What do you believe are the prospects for future investment in your business at Warrnambool over the next 12 months? CAT			
	All	Very low or Low	Medium	High or Very high
All	100	57.14	30.69	12.17
2011	100	44.62	36.92	18.46
2012	100	50.00	37.50	12.50
2013	100	69.57	26.09	4.35
2014	100	67.39	21.74	10.87

Table: % of row

	All	Very low or Low	Medium	High or Very high
All	189	108	58	23
2011	65	29	24	12
2012	32	16	12	4
2013	46	32	12	2
2014	46	31	10	5

Count table

There is insufficient evidence to determine whether or not any significant change has taken place overall. However, considering the one group 'Very low' or 'Low' on its own, the estimate of 45% for 2011 has increased significantly by 22% in 2014, to 67% (z -2.2, p-value 0.03).

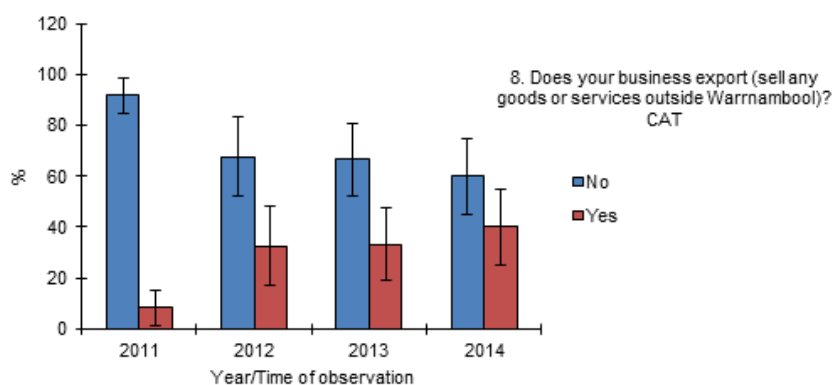
Export activities and prospects

Within the Accommodation, Hospitality & Food/ Beverage Services Industry Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

8. Does your business export (sell any goods or services outside Warrnambool)? CAT

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	No	Yes
All	100	73.40	26.60
2011	100	91.80	8.20
2012	100	67.57	32.43
2013	100	66.67	33.33
2014	100	60.00	40.00

Table: % of row



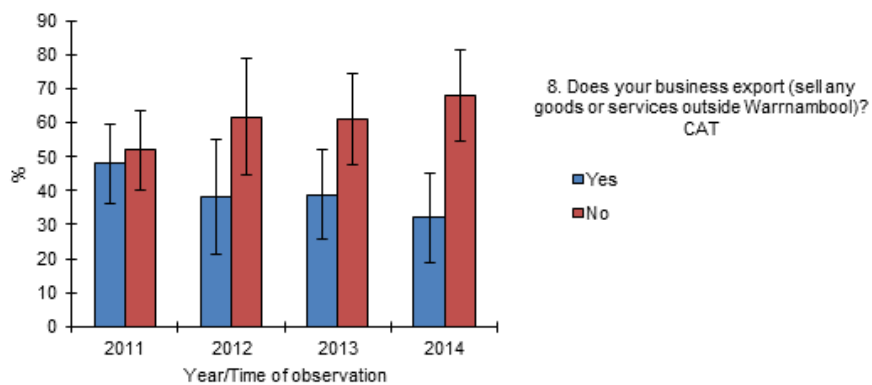
Column chart: 95% confidence intervals for row totals are presented.

A statistically significant difference is evident between 2011 and 2014 within the Accommodation, Hospitality & Food/ Beverage Services Industry Group (Chi-square 16.4, DF 3, p-value = 0.000). The amount of goods exported outside Warrnambool rose from an estimated 8.2% in 2011 to 42% in 2012, and is maintained at around 40% in 2014. A significant increase of 32% over the four years of observations.

Within the Business Professional and Commercial Services Industry Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	Yes	No
All	100	40.28	59.72
2011	100	47.95	52.05
2012	100	38.24	61.76
2013	100	38.89	61.11
2014	100	32.00	68.00

Table: % of row



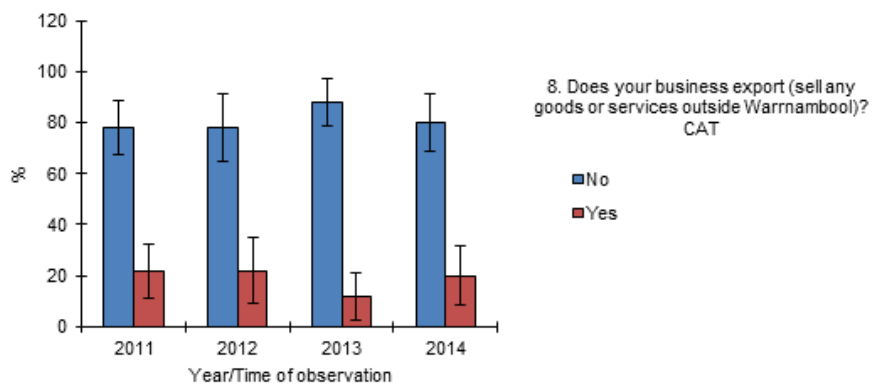
Column chart: 95% confidence intervals for row totals are presented.

There is no evidence of change in the amount of exports for this industry group (Chi-square 3.34, DF 3, p-value = 0.346).

Within the Government, Education and Community Services Industry Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	No	Yes
All	100	81.09	18.91
2011	100	78.33	21.67
2012	100	78.05	21.95
2013	100	88.00	12.00
2014	100	80.00	20.00

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

There is no evidence of change in the amount of exports for this industry group (Chi-square, 2.14, DF 3, p-value = 0.544).

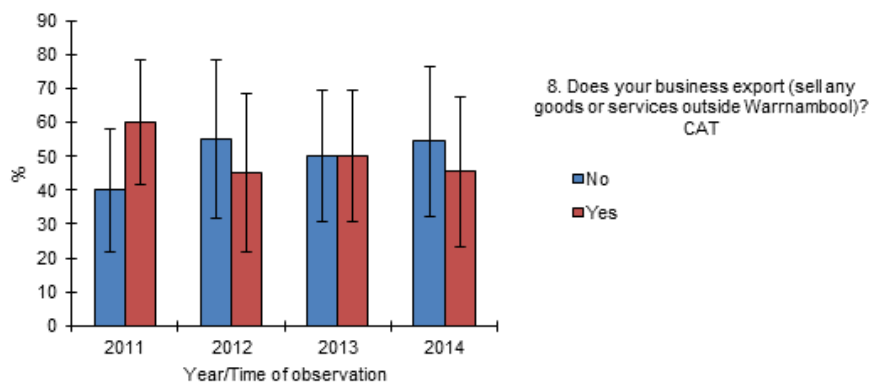
Within the Manufacturing, Transport and Storage Industry Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

8. Does your business export (sell any goods or services outside Warrnambool)? CAT			
	All	No	Yes
All	100	49.00	51.00
2011	100	40.00	60.00
2012	100	55.00	45.00
2013	100	50.00	50.00
2014	100	54.55	45.45

Table: % of row

	All	No	Yes
All	100	49	51
2011	30	12	18
2012	20	11	9
2013	28	14	14
2014	22	12	10

Count table



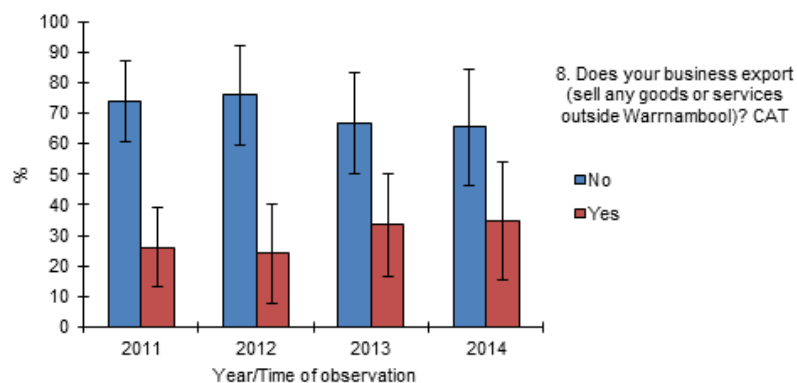
Column chart: 95% confidence intervals for row totals are presented.

There is no evidence of change in the amount of exports for this industry group (Chi-square 1.54, DF 3, p-value = 0.673).

Within the Other Services Industry Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	No	Yes
All	100	70.90	29.10
2011	100	73.91	26.09
2012	100	75.86	24.14
2013	100	66.67	33.33
2014	100	65.38	34.62

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

There is no evidence of change in the amount of exports for this industry group (Chi-square 1.218, DF 3, p-value = 0.749).

Within the Primary Industries Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	No	Yes
All	100	53.13	46.88
2011	100	50.00	50.00
2012	100	50.00	50.00
2013	100	42.86	57.14
2014	100	80.00	20.00

Table: % of row

	Q8		
	All	No	Yes
All	27	13	14
2011	14	7	7
2012	6	3	3
2013	7	3	4

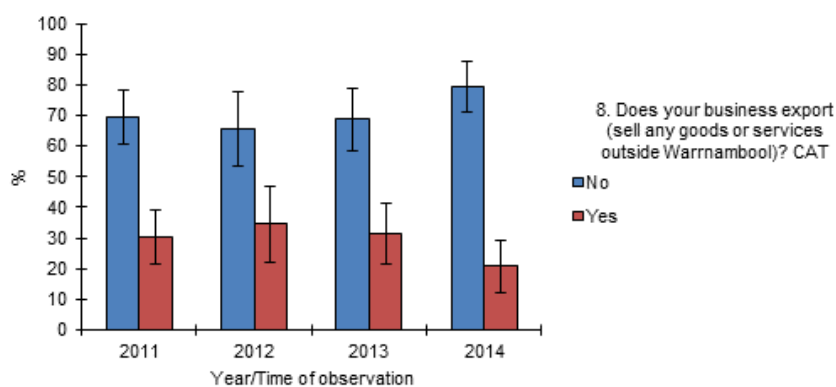
Count table

There has been no change in the proportion of respondents who indicate that they are exporting, however, there are too few observations to draw any significant conclusions regarding this measure within the Primary Industries Group.

Within the Retail Trade Industry Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	No	Yes
All	100	71.26	28.74
2011	100	69.52	30.48
2012	100	65.57	34.43
2013	100	68.67	31.33
2014	100	79.35	20.65

Table: % of row



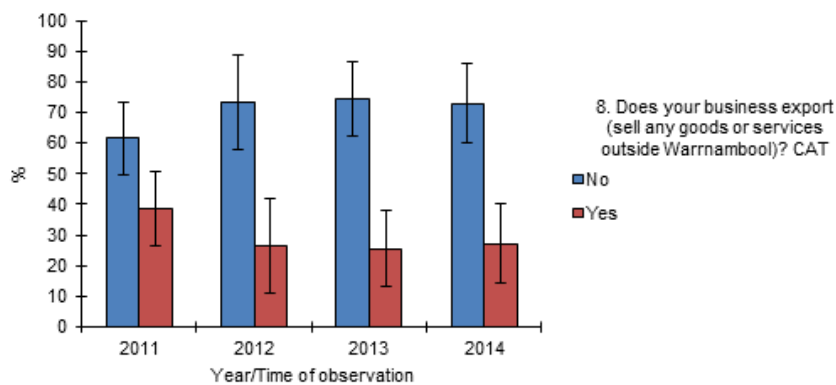
Column chart: 95% confidence intervals for row totals are presented.

There is no evidence of change in the amount of exports for this industry group (Chi-square 4.33, DF 3, p-value = 0.228).

Within the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industry Group, has the amount of goods exported outside of Warrnambool changed over the period 2011, 2012, 2013 and 2014?

	8. Does your business export (sell any goods or services outside Warrnambool)? CAT		
	All	No	Yes
All	100	69.70	30.30
2011	100	61.54	38.46
2012	100	73.53	26.47
2013	100	74.51	25.49
2014	100	72.92	27.08

Table: % of row



Column chart: 95% confidence intervals for row totals are presented.

There is no evidence of change in the amount of exports for this industry group (Chi-square 3.080, DF 3, p-value = 0.379).

Expected exports for the next 12 months

There is insufficient data within any one industry group to make any claims regarding changes in expected exports for the next 12 months.

Sourcing Supplies and Sales Patterns

Has there been a change in how the Accommodation, Hospitality & Food/ Beverage Services Industries source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	2.3053	190	9.76396
Rest of Aus	4.8237	190	11.29600
Rest of VIC	16.0842	190	21.63583
SWVIC	5.5474	190	10.96244
W'bool	68.0342	190	31.58251
Total	19.3589	950	31.23189

Table: The percentage of supplies sourced from the various locations over the four years.

Most supplies, 68% of them, are sourced from Warrnambool.

Report

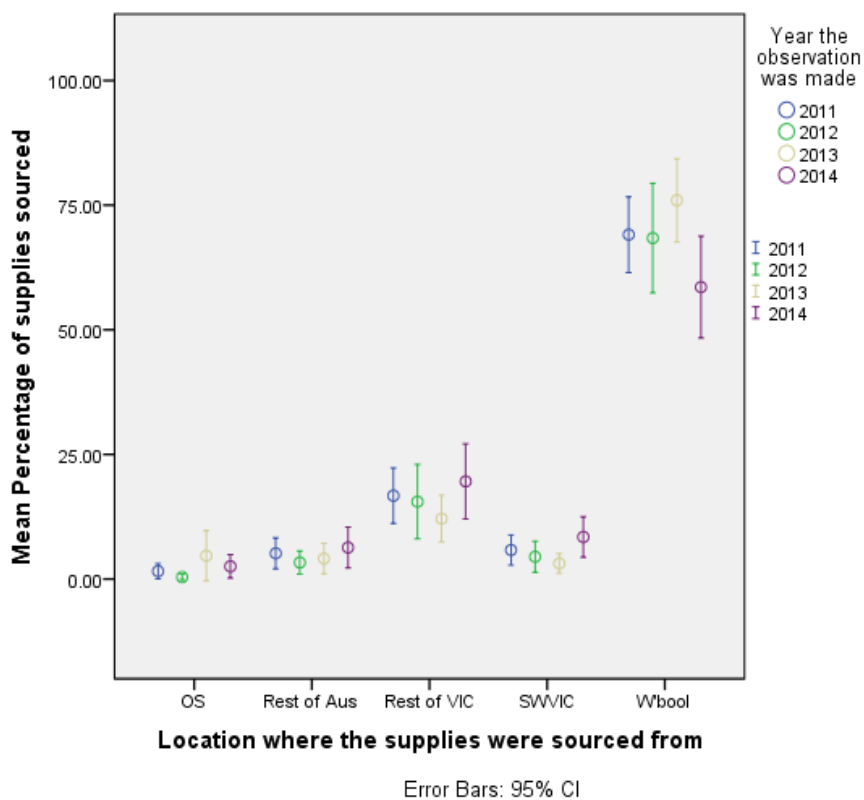
Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	1.5738	61	6.02068
	2012	.3947	38	1.79398
	2013	4.6667	45	16.83476
	2014	2.5435	46	7.92943
	Total	2.3053	190	9.76396
Rest of Aus	2011	5.1557	61	12.13794
	2012	3.3158	38	6.99075
	2013	4.1111	45	10.24079
	2014	6.3261	46	13.85168
	Total	4.8237	190	11.29600
Rest of VIC	2011	16.7213	61	21.69649
	2012	15.5263	38	22.71413
	2013	12.1111	45	15.64844
	2014	19.5870	46	25.40916
	Total	16.0842	190	21.63583
SWVIC	2011	5.8197	61	11.76791

2011, 2012, 2013 and 2014 Warrnambool Business Survey

	2012	4.4737	38	9.50032
	2013	3.1333	45	6.58718
	2014	8.4348	46	13.71237
	Total	5.5474	190	10.96244
	2011	69.0902	61	29.66613
W'bool	2012	68.3947	38	33.46764
	2013	75.9778	45	27.81145
	2014	58.5652	46	34.38388
	Total	68.0342	190	31.58251
	2011	19.6721	305	31.12024
Total	2012	18.4211	190	31.65859
	2013	20.0000	225	32.89268
	2014	19.0913	230	29.49229
	Total	19.3589	950	31.23189

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Accommodation, Hospitality & Food/ Beverage Services Industry Group. Compared to last year, there are significantly fewer supplies sourced locally within this industry group. (76% in 2013 and 56% in 2014)

Has there been a change in how the Business Professional and Commercial Services Industries Group source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	3.0892	213	12.46643
Rest of Aus	12.2113	213	22.98682
Rest of VIC	16.6244	213	22.82025
SWVIC	4.7559	213	9.32417
W'bool	60.9718	213	33.81427
Total	19.5305	1065	30.64604

Table: The percentage of supplies sourced from the various locations over the four years.

Most supplies, 61% of them, are sourced from Warrnambool.

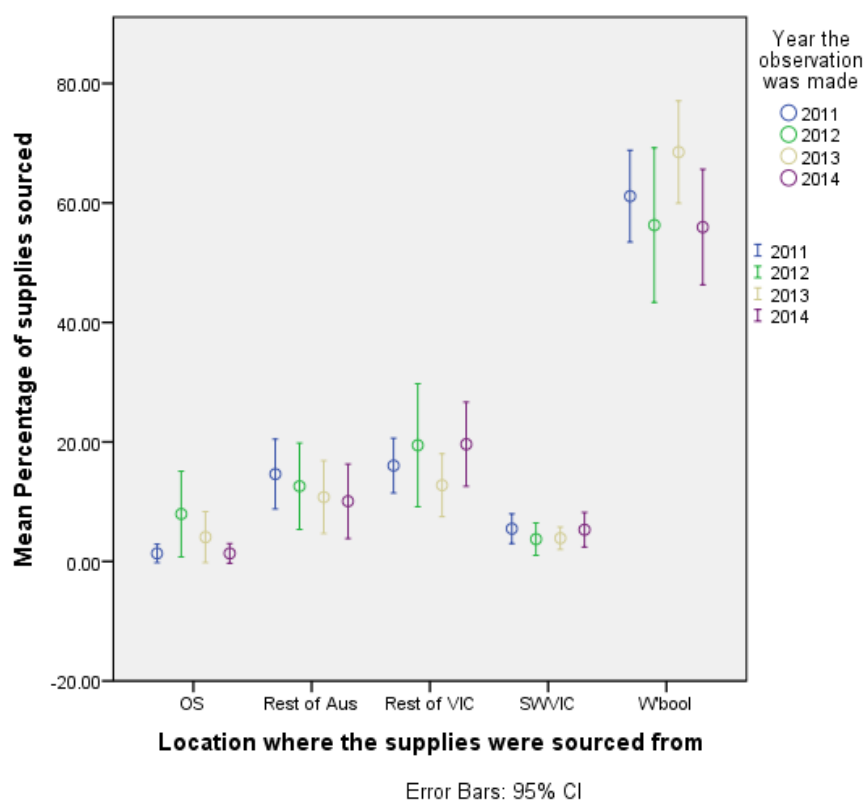
Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	1.3425	73	6.56002
	2012	7.9412	34	20.56467
	2013	4.0741	54	15.60340
	2014	1.3462	52	5.86744
	Total	3.0892	213	12.46643
Rest of Aus	2011	14.6301	73	25.01306
	2012	12.5882	34	20.76290
	2013	10.7593	54	22.33445
	2014	10.0769	52	22.37194
	Total	12.2113	213	22.98682
Rest of VIC	2011	16.0411	73	19.62031
	2012	19.4412	34	29.54215
	2013	12.7593	54	19.29800
	2014	19.6154	52	25.27508
	Total	16.6244	213	22.82025
SWVIC	2011	5.4795	73	10.71747
	2012	3.7353	34	7.79008
	2013	3.8889	54	6.84510
	2014	5.3077	52	10.42722

W'bool	Total	4.7559	213	9.32417
	2011	61.1370	73	32.94580
	2012	56.2941	34	37.08755
	2013	68.5185	54	31.40769
	2014	55.9615	52	34.71224
Total	Total	60.9718	213	33.81427
	2011	19.7260	365	30.10251
	2012	20.0000	170	31.24441
	2013	20.0000	270	32.03843
	2014	18.4615	260	29.66601
	Total	19.5305	1065	30.64604

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of

Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Business Professional and Commercial Services Industry Group.

Has there been a change in how Government, Education and Community Services Warrnambool Industries Group source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	2.6108	203	11.43563
Rest of Aus	9.2906	203	16.49540
Rest of VIC	23.0739	203	26.75095
SWVIC	7.2808	203	15.16461
W'bool	55.2808	203	32.33404
Total	19.5074	1015	29.04522

Table: The percentage of supplies sourced from the various locations over the four years.

Most supplies, 55% of them, are sourced from Warrnambool.

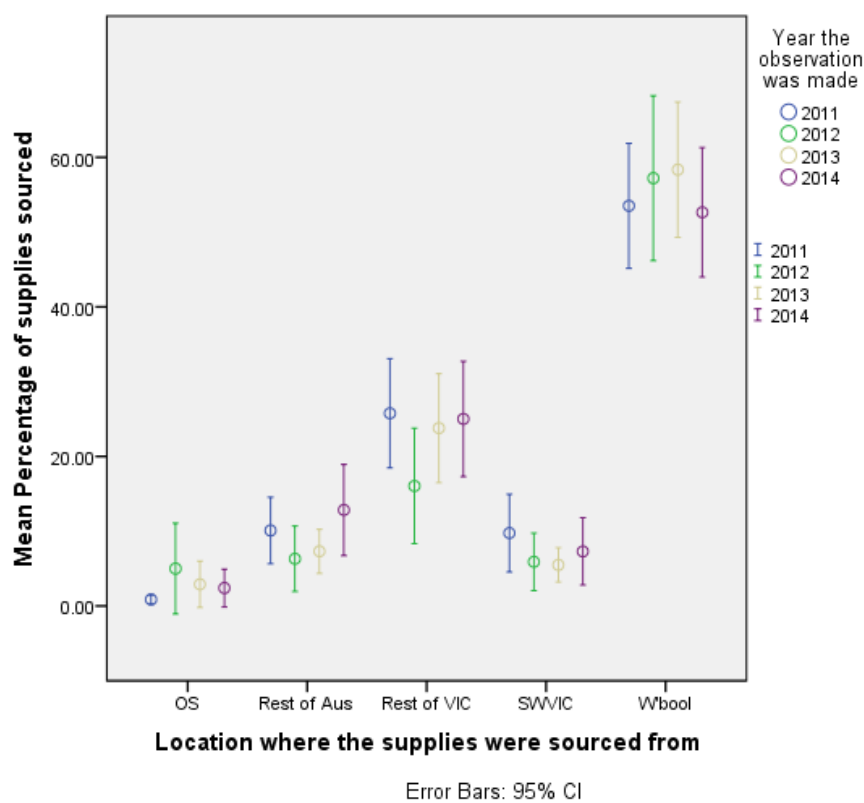
Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	.8667	60	2.46650
	2012	5.0000	42	19.50610
	2013	2.9020	51	11.07656
	2014	2.4000	50	8.91456
	Total	2.6108	203	11.43563
Rest of Aus	2011	10.1000	60	17.22503
	2012	6.3095	42	14.05822
	2013	7.3137	51	10.51378
	2014	12.8400	50	21.46983
	Total	9.2906	203	16.49540
Rest of VIC	2011	25.7667	60	28.23471
	2012	16.0476	42	24.76618
	2013	23.7843	51	25.91858
	2014	25.0200	50	27.12743
	Total	23.0739	203	26.75095
SWVIC	2011	9.7500	60	20.15670
	2012	5.9048	42	12.34624
	2013	5.4902	51	8.13971

W'bool	2014	7.3000	50	15.85038
	Total	7.2808	203	15.16461
	2011	53.5167	60	32.33589
	2012	57.2143	42	35.35502
	2013	58.3529	51	32.13710
	2014	52.6400	50	30.45087
Total	Total	55.2808	203	32.33404
	2011	20.0000	300	29.15235
	2012	18.0952	210	30.15717
	2013	19.5686	255	28.73710
	2014	20.0400	250	28.40680
	Total	19.5074	1015	29.04522

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of

Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Government, Education and Community Services of Warrnambool Industries Group.

Has there been a change in how the Manufacturing, transport and storage Industries Group source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	3.2376	101	12.00845
Rest of Aus	11.7772	101	19.03214
Rest of VIC	41.3366	101	34.22551
SWVIC	9.1337	101	16.57723
W'bool	33.5248	101	30.90230
Total	19.8020	505	28.25359

Table: The percentage of supplies sourced from the various locations over the four years.

Most supplies, 41% of them, are sourced from the rest of Victoria.

Report

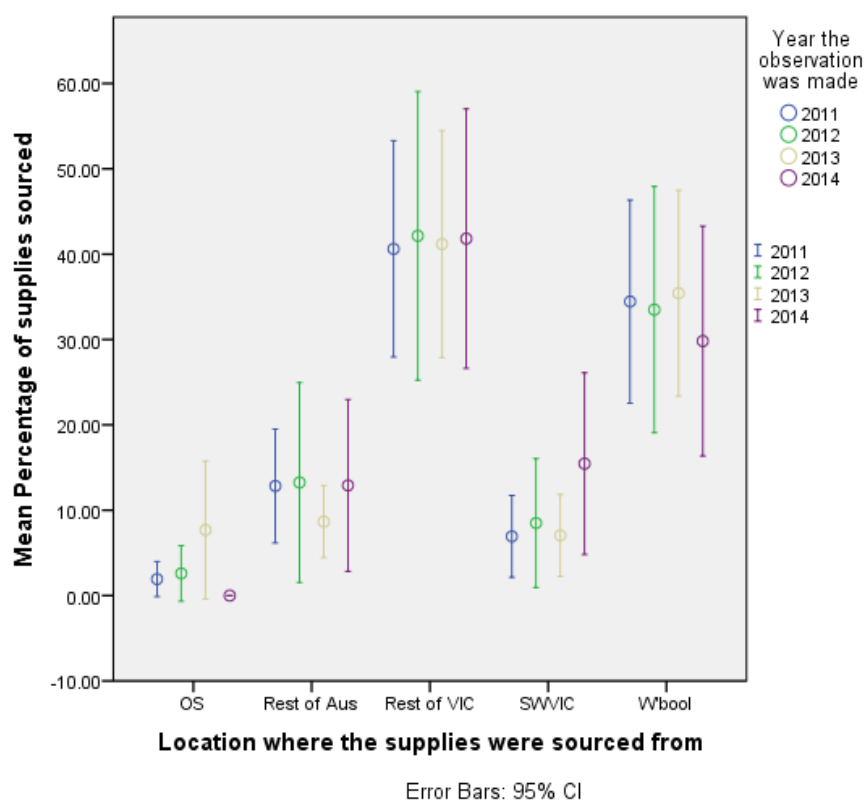
Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	1.9355	31	5.57934
	2012	2.6000	20	6.95398
	2013	7.6786	28	20.83809
	2014	.0000	22	.00000
	Total	3.2376	101	12.00845
Rest of Aus	2011	12.8387	31	18.17892
	2012	13.2500	20	25.04076
	2013	8.6607	28	10.89687
	2014	12.9091	22	22.68817
	Total	11.7772	101	19.03214
Rest of VIC	2011	40.6129	31	34.55399
	2012	42.1500	20	36.13320
	2013	41.1786	28	34.31882
	2014	41.8182	22	34.27985
	Total	41.3366	101	34.22551
SWVIC	2011	6.9355	31	13.08163
	2012	8.5000	20	16.14898
	2013	7.0536	28	12.38005
	2014	15.4545	22	23.99946
	Total	9.1337	101	16.57723

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	2011	34.4516	31	32.44774
	2012	33.5000	20	30.82634
	2013	35.4286	28	31.06675
	2014	29.8182	22	30.36702
	Total	33.5248	101	30.90230
Total	2011	19.3548	155	27.91051
	2012	20.0000	100	29.07983
	2013	20.0000	140	27.96394
	2014	20.0000	110	28.71914
	Total	19.8020	505	28.25359

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the

Manufacturing, Transport and Storage Industries Group. (No observations made for 2014 – data not recorded?)

Has there been a change in how the Other Services Industries Group source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	2.4562	137	10.15821
Rest of Aus	13.6898	137	24.50541
Rest of VIC	28.4088	137	31.71925
SWVIC	8.8613	137	19.19642
W'bool	43.5912	137	37.44870
Total	19.4015	685	30.19639

Table: The percentage of supplies sourced from the various locations over the four years.

Most supplies, 44% of them, are sourced from Warrnambool.

Report

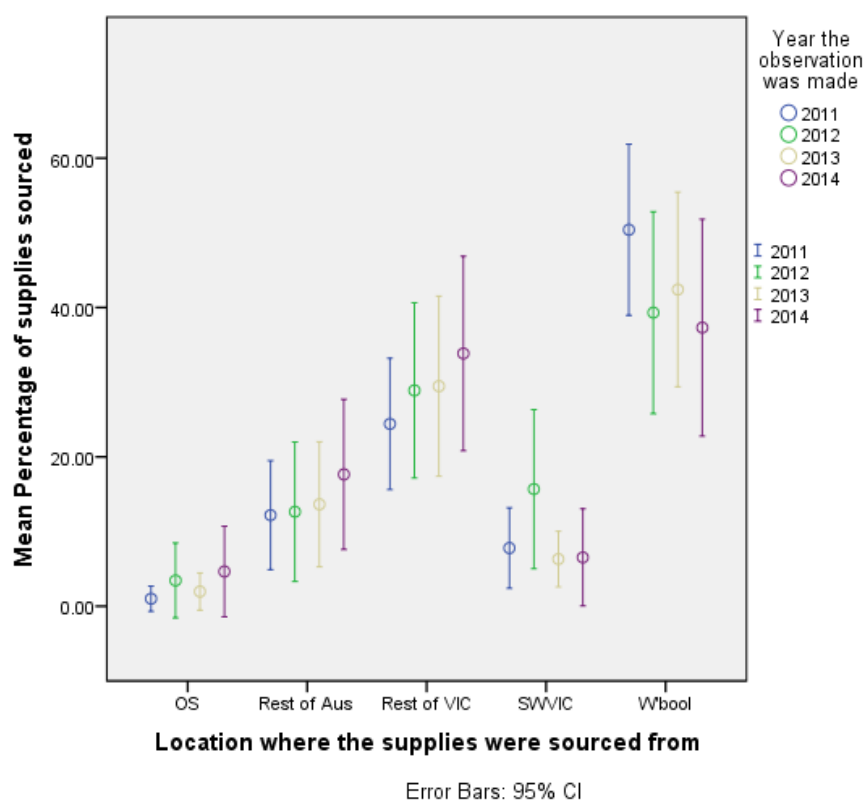
Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	1.0104	48	5.80397
	2012	3.4483	29	13.16811
	2013	1.9706	34	7.16678
	2014	4.6538	26	15.01717
	Total	2.4562	137	10.15821
Rest of Aus	2011	12.1979	48	25.14611
	2012	12.6552	29	24.55646
	2013	13.6471	34	24.00238
	2014	17.6538	26	24.90613
	Total	13.6898	137	24.50541
Rest of VIC	2011	24.4167	48	30.31525
	2012	28.8966	29	30.86184
	2013	29.4706	34	34.56416
	2014	33.8462	26	32.22756
	Total	28.4088	137	31.71925
SWVIC	2011	7.7917	48	18.53801
	2012	15.6897	29	27.98993
	2013	6.3235	34	10.69330
	2014	6.5385	26	16.11020
	Total	8.8613	137	19.19642

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	2011	50.4167	48	39.44877
	2012	39.3103	29	35.54987
	2013	42.4118	34	37.35426
	2014	37.3077	26	35.95082
	Total	43.5912	137	37.44870
Total	2011	19.1667	240	31.44716
	2012	20.0000	145	29.91748
	2013	18.7647	170	29.65308
	2014	20.0000	130	29.15635
	Total	19.4015	685	30.19639

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Other Services Industries Group.

Has there been a change in how the Primary Industries Group source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	10.5758	33	25.82396
Rest of Aus	8.1515	33	13.84766
Rest of VIC	17.3333	33	26.28292
SWVIC	17.4848	33	31.02028
W'bool	40.0909	33	39.86255
Total	18.7273	165	30.47217

Table: The percentage of supplies sourced from the various locations over the four years.

Most supplies, 40% of them, are sourced from Warrnambool.

Report

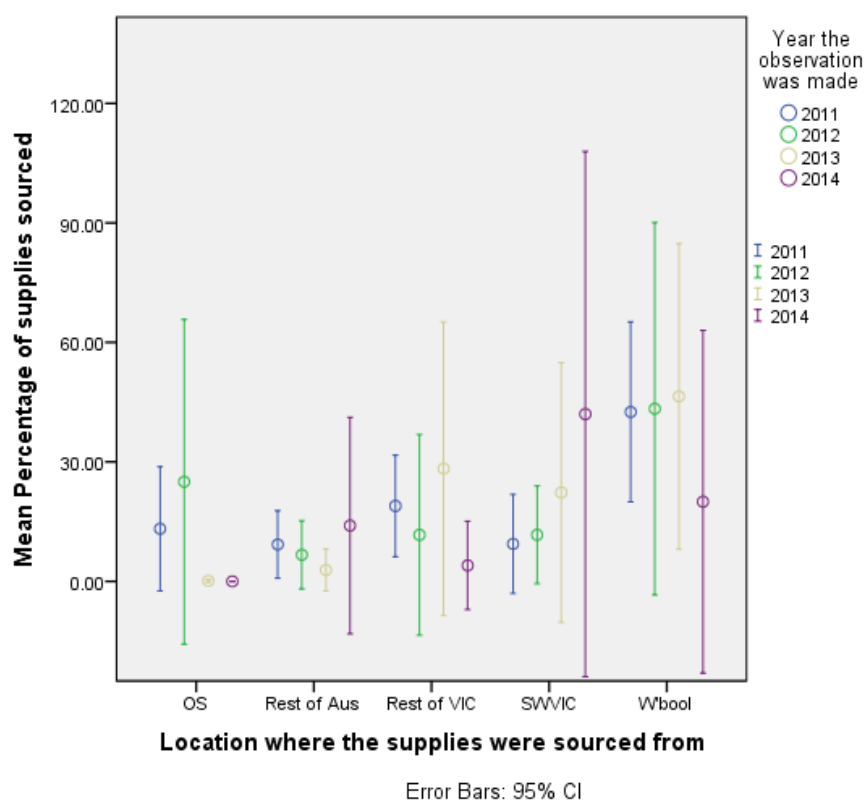
Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	13.2000	15	28.17851
	2012	25.0000	6	38.85872
	2013	.1429	7	.37796
	2014	.0000	5	.00000
	Total	10.5758	33	25.82396
Rest of Aus	2011	9.2667	15	15.33188
	2012	6.6667	6	8.16497
	2013	2.8571	7	5.66947
	2014	14.0000	5	21.90890
	Total	8.1515	33	13.84766
Rest of VIC	2011	18.9333	15	23.01076
	2012	11.6667	6	24.01388
	2013	28.2857	7	39.85270
	2014	4.0000	5	8.94427
	Total	17.3333	33	26.28292
SWVIC	2011	9.4000	15	22.40153
	2012	11.6667	6	11.69045
	2013	22.2857	7	35.24540
	2014	42.0000	5	53.10367

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	Total	17.4848	33	31.02028
	2011	42.5333	15	40.81993
	2012	43.3333	6	44.57204
	2013	46.4286	7	41.50445
	2014	20.0000	5	34.64102
Total	Total	40.0909	33	39.86255
	2011	18.6667	75	29.35815
	2012	19.6667	30	30.34097
	2013	20.0000	35	33.31490
	2014	16.0000	25	31.49074
	Total	18.7273	165	30.47217

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Primary Industries Group.

Has there been a change in how the Retail Trade Industries Group source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	17.7977	346	32.08656
Rest of Aus	26.9075	346	31.96788
Rest of VIC	33.6705	346	36.53795
SWVIC	4.4595	346	11.81910
W'bool	15.7486	346	28.22439
Total	19.7168	1730	31.02172

Table: The percentage of supplies sourced from the various locations over the four years.

33% of supplies are sourced from the rest of Victoria and 27% from the rest of Australia.

Report

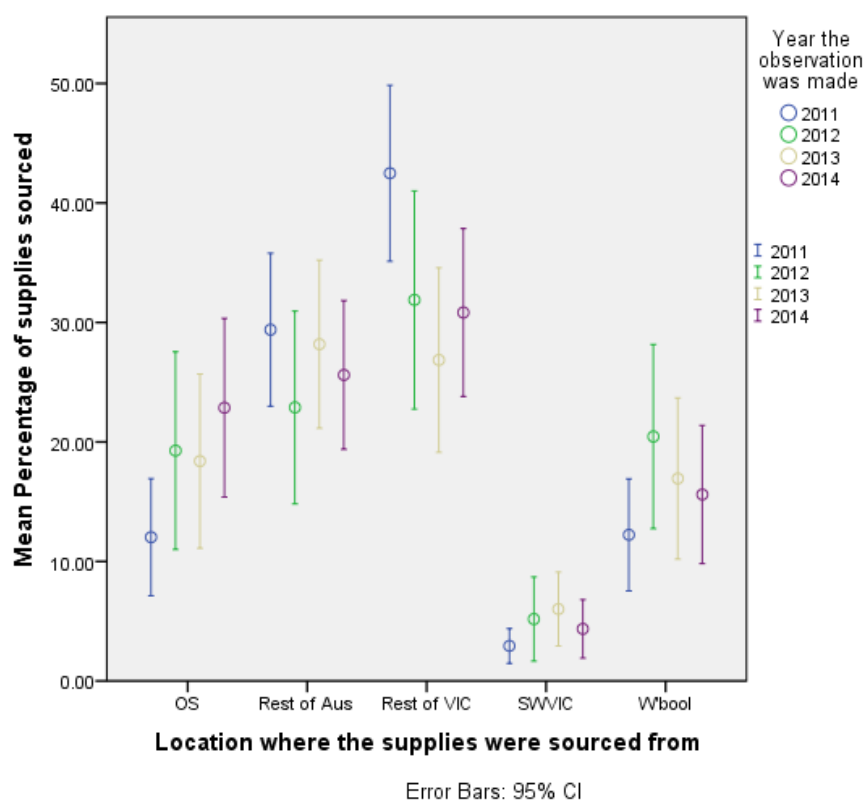
Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	12.0280	107	25.54369
	2012	19.2742	62	32.56629
	2013	18.3976	83	33.37735
	2014	22.8617	94	36.49233
	Total	17.7977	346	32.08656
Rest of Aus	2011	29.3925	107	33.37487
	2012	22.8871	62	31.77539
	2013	28.1807	83	32.22109
	2014	25.6064	94	30.37763
	Total	26.9075	346	31.96788
Rest of VIC	2011	42.4860	107	38.41098
	2012	31.8871	62	35.94262
	2013	26.8554	83	35.38538
	2014	30.8298	94	34.32690
	Total	33.6705	346	36.53795
SWVIC	2011	2.9299	107	7.60879
	2012	5.1774	62	13.87358
	2013	6.0120	83	14.17787
	2014	4.3564	94	11.98086

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	Total	4.4595	346	11.81910
	2011	12.2290	107	24.47036
	2012	20.4516	62	30.33457
	2013	16.9398	83	30.92925
	2014	15.6011	94	28.20228
Total	Total	15.7486	346	28.22439
	2011	19.8131	535	31.24144
	2012	19.9355	310	30.94544
	2013	19.2771	415	31.10498
	2014	19.8511	470	30.84223
	Total	19.7168	1730	31.02172

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Retail Trade Industries Group.

2011, 2012, 2013 and 2014 Warrnambool Business Survey

Has there been a change in how the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industry Group source their supplies over the four years of measurement?

Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Mean	N	Std. Deviation
OS	2.4216	204	10.20184
Rest of Aus	8.0931	204	18.69976
Rest of VIC	21.6961	204	30.03915
SWVIC	9.2794	204	17.20967
W'bool	56.3284	204	37.75622
Total	19.5637	1020	31.48006

Table: The percentage of supplies sourced from the various locations over the four years.

Most supplies, 56% of them, are sourced from Warrnambool.

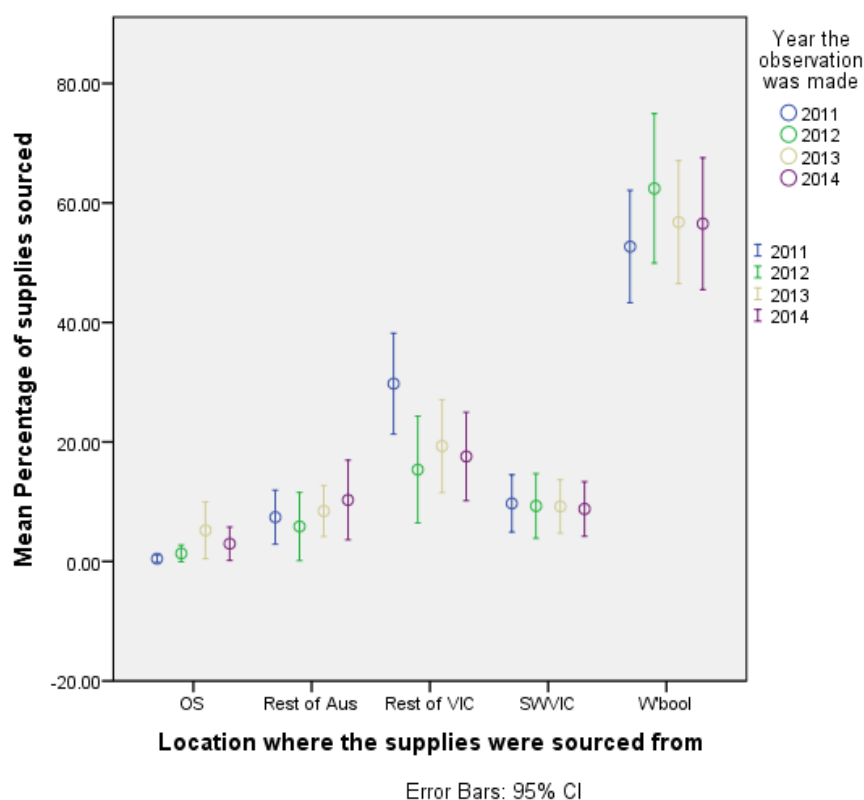
Report

Percentage of supplies accessed from:

Location the supplies were sourced from	Year the observation was made	Mean	N	Std. Deviation
OS	2011	.4559	68	2.55351
	2012	1.3429	35	4.07967
	2013	5.2115	52	17.05738
	2014	2.9592	49	9.75098
	Total	2.4216	204	10.20184
Rest of Aus	2011	7.3971	68	18.70441
	2012	5.8571	35	16.60465
	2013	8.4423	52	15.32320
	2014	10.2857	49	23.15977
	Total	8.0931	204	18.69976
Rest of VIC	2011	29.7500	68	34.87820
	2012	15.3714	35	26.02836
	2013	19.3077	52	27.92886
	2014	17.5714	49	25.78598
	Total	21.6961	204	30.03915
SWVIC	2011	9.7059	68	19.79149
	2012	9.2857	35	15.75095
	2013	9.1923	52	16.13429
	2014	8.7755	49	15.90501

W'bool	Total	9.2794	204	17.20967
	2011	52.6912	68	38.90143
	2012	62.4286	35	36.43147
	2013	56.7885	52	36.97712
	2014	56.5306	49	38.43723
Total	Total	56.3284	204	37.75622
	2011	20.0000	340	32.41217
	2012	18.8571	175	31.55596
	2013	19.7885	260	30.71763
	2014	19.2245	245	31.08968
	Total	19.5637	1020	31.48006

Table: The percentage of supplies sourced from the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of supplies sourced either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industries Group.

2011, 2012, 2013 and 2014 Warrnambool Business Survey

Sales Trends

Has there been a change in where the Accommodation, Hospitality & Food/ Beverage Services Industry Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	5.3211	190	10.64107
Rest of Aus	10.1947	190	16.42158
Rest of VIC	20.7289	190	28.48088
SWVIC	7.9500	190	12.63986
W'bool	53.7737	190	43.61394
Total	19.5937	950	31.11638

Table: The percentage of sales made to the various locations over the four years.

Most sales, 65% of them, are made to Warrnambool.

Report

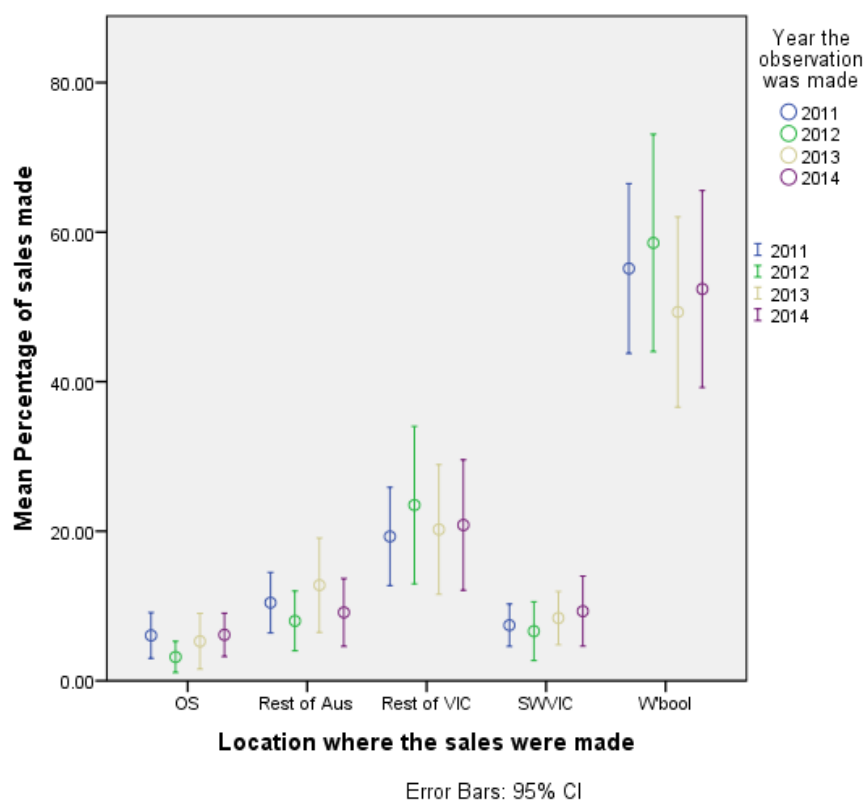
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	6.0656	61	11.96504
	2012	3.1842	38	6.37077
	2013	5.2778	45	12.39481
	2014	6.1413	46	9.78812
	Total	5.3211	190	10.64107
Rest of Aus	2011	10.4426	61	15.83932
	2012	8.0000	38	12.15441
	2013	12.7889	45	21.00176
	2014	9.1413	46	15.27549
	Total	10.1947	190	16.42158
Rest of VIC	2011	19.2951	61	25.68031
	2012	23.5000	38	32.01077
	2013	20.2333	45	28.85063
	2014	20.8261	46	29.35401
	Total	20.7289	190	28.48088
SWVIC	2011	7.4262	61	11.06414

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	2012	6.6316	38	11.96938
	2013	8.3889	45	11.85945
	2014	9.3043	46	15.76617
	Total	7.9500	190	12.63986
	2011	55.1311	61	44.29841
	2012	58.5526	38	44.20511
	2013	49.3111	45	42.36252
	2014	52.3913	46	44.35788
	Total	53.7737	190	43.61394
	2011	19.6721	305	30.92017
Total	2012	19.9737	190	32.72758
	2013	19.2000	225	30.22394
	2014	19.5609	230	31.07156
	Total	19.5937	950	31.11638

Table: The percentage of sales made to the various locations for each of the four years.



Error bars depict a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Accommodation, Hospitality & Food/ Beverage Services Industry Group.

Has there been a change in where the Business Professional and Commercial Services Industry Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	.6056	213	3.32009
Rest of Aus	3.6150	213	9.23295
Rest of VIC	8.4460	213	14.36463
SWVIC	24.2535	213	19.95730
W'bool	61.5540	213	23.88540
Total	19.6948	1065	27.53716

Table: The percentage of sales made to the various locations over the four years.

Most sales, 62% of them, are made to Warrnambool.

Report

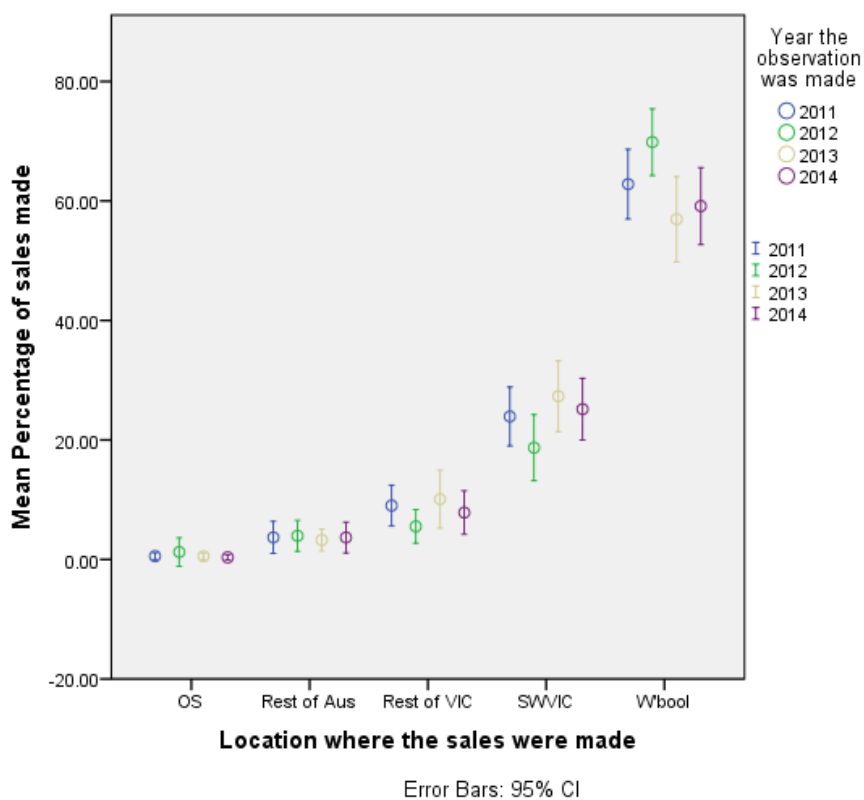
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	.5479	73	2.43836
	2012	1.2353	34	6.85812
	2013	.5370	54	2.01610
	2014	.3462	52	1.55783
	Total	.6056	213	3.32009
Rest of Aus	2011	3.6849	73	11.48172
	2012	3.9412	34	7.40983
	2013	3.2593	54	6.69606
	2014	3.6731	52	9.26880
	Total	3.6150	213	9.23295
Rest of VIC	2011	9.0137	73	14.72384
	2012	5.5294	34	8.04245
	2013	10.0926	54	17.83601
	2014	7.8462	52	13.03297
	Total	8.4460	213	14.36463
SWVIC	2011	23.9315	73	21.06295
	2012	18.7059	34	15.87361
	2013	27.3148	54	21.73409
	2014	25.1538	52	18.54659
	Total	24.2535	213	19.95730

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	2011	62.8219	73	25.00186
	2012	69.8529	34	16.02485
	2013	56.9444	54	26.16019
	2014	59.1346	52	23.13052
	Total	61.5540	213	23.88540
Total	2011	20.0000	365	28.38762
	2012	19.8529	170	28.23206
	2013	19.6296	270	27.14445
	2014	19.2308	260	26.39850
	Total	19.6948	1065	27.53716

Table: The percentage of sales made to the various locations for each of the four years.



Error bars depict a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Business Professional and Commercial Services Industry Group over the four years of measurement.

Has there been a change in where the Government, Education and Community Services Industry Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	.1724	203	.81285
Rest of Aus	1.3153	203	4.73680
Rest of VIC	4.1232	203	10.14985
SWVIC	15.4778	203	17.25187
W'bool	68.0690	203	31.49627
Total	17.8315	1015	30.70935

Table: The percentage of sales made to the various locations over the four years.

Most sales, 68% of them, are made to Warrnambool.

Report

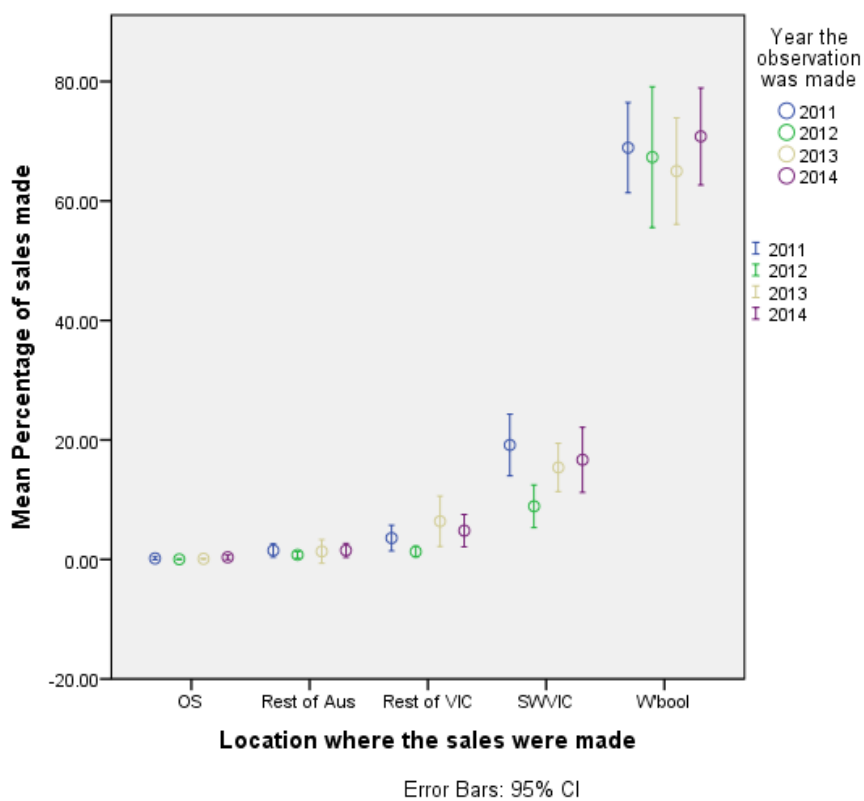
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	.1750	60	.90584
	2012	.0238	42	.15430
	2013	.1078	51	.39133
	2014	.3600	50	1.22491
	Total	.1724	203	.81285
Rest of Aus	2011	1.5083	60	4.31345
	2012	.7619	42	1.70808
	2013	1.3431	51	7.03028
	2014	1.5200	50	4.10694
	Total	1.3153	203	4.73680
Rest of VIC	2011	3.5833	60	8.27758
	2012	1.3095	42	2.84980
	2013	6.3922	51	15.04005
	2014	4.8200	50	9.56970
	Total	4.1232	203	10.14985
SWVIC	2011	19.1500	60	20.02272
	2012	8.9048	42	11.45044
	2013	15.3922	51	14.41122
	2014	16.6800	50	19.17209
	Total	15.4778	203	17.25187

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	2011	68.9167	60	29.23620
	2012	67.3333	42	37.81255
	2013	65.0000	51	31.71750
	2014	70.8000	50	28.61283
	Total	68.0690	203	31.49627
Total	2011	18.6667	300	30.74451
	2012	15.6667	210	31.45230
	2013	17.6471	255	29.74933
	2014	18.8360	250	31.08754
	Total	17.8315	1015	30.70935

Table: The percentage of sales made to the various locations for each of the four years.



Error bars depict a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to

overseas consumers for the years 2011, 2012, 2013 and 2014 for the Government, Education and Community Services Industry Group.

Has there been a change in where the Manufacturing, Transport and Storage Industry Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	1.6733	101	10.30932
Rest of Aus	6.8218	101	17.52792
Rest of VIC	10.0099	101	15.76102
SWVIC	22.5842	101	20.37904
W'bool	58.8119	101	29.22318
Total	19.9802	505	28.43406

Table: The percentage of sales made to the various locations over the four years.

Most sales, 59% of them, are made to Warrnambool.

Report

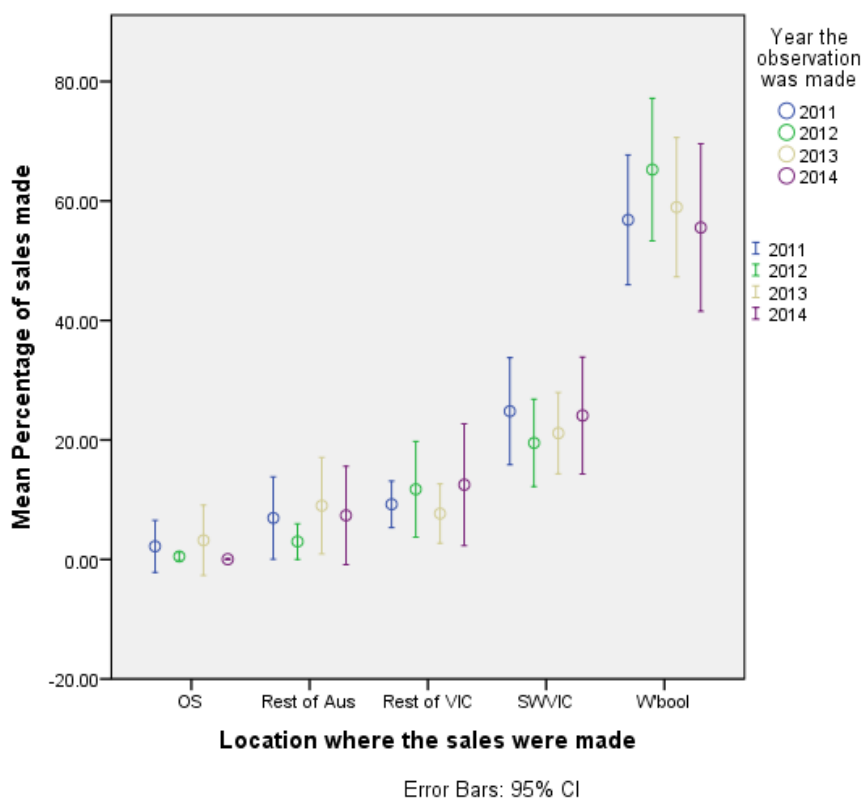
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	2.1935	31	11.84742
	2012	.5000	20	1.53897
	2013	3.2143	28	15.16662
	2014	.0455	22	.21320
	Total	1.6733	101	10.30932
Rest of Aus	2011	6.9355	31	18.80414
	2012	3.0000	20	6.36603
	2013	9.0000	28	20.79530
	2014	7.3636	22	18.56403
	Total	6.8218	101	17.52792
Rest of VIC	2011	9.2258	31	10.64177
	2012	11.7500	20	17.11225
	2013	7.6786	28	12.80062
	2014	12.5000	22	22.97773
	Total	10.0099	101	15.76102
SWVIC	2011	24.8065	31	24.40276
	2012	19.5000	20	15.63565
	2013	21.1429	28	17.57253
	2014	24.0909	22	22.07327

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	Total	22.5842	101	20.37904
	2011	56.8387	31	29.64355
	2012	65.2500	20	25.51960
	2013	58.9643	28	30.09304
	2014	55.5455	22	31.64344
Total	Total	58.8119	101	29.22318
	2011	20.0000	155	28.37000
	2012	20.0000	100	28.26641
	2013	20.0000	140	28.53422
	2014	19.9091	110	28.93509
	Total	19.9802	505	28.43406

Table: The percentage of sales made to the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Manufacturing, Transport and Storage Industry Group. No significant changes are evident.

Has there been a change in where the Other Services Industry Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	.9781	137	8.62833
Rest of Aus	1.9489	137	6.34582
Rest of VIC	7.2263	137	15.68907
SWVIC	17.6058	137	19.77348
W'bool	65.6715	137	31.11958
Total	18.6861	685	30.49047

Table: The percentage of sales made to the various locations over the four years.

Most sales, 66% of them, are made to Warrnambool.

Report

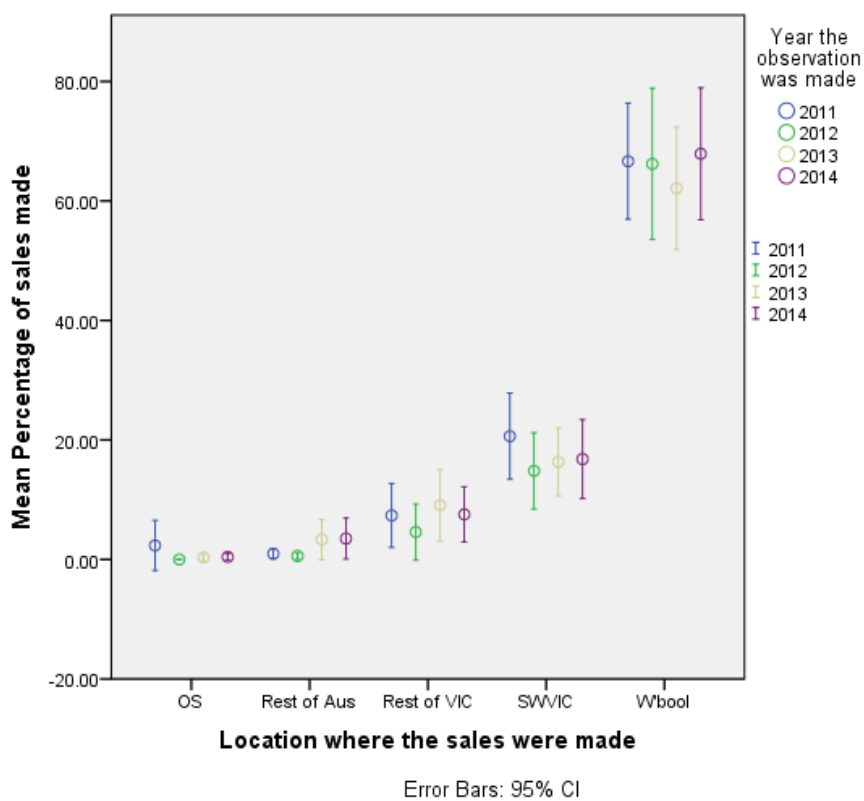
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	2.3333	48	14.47130
	2012	.0000	29	.00000
	2013	.3235	34	1.71836
	2014	.4231	26	1.36156
	Total	.9781	137	8.62833
Rest of Aus	2011	.9583	48	2.65745
	2012	.5862	29	1.40197
	2013	3.3235	34	9.66004
	2014	3.5000	26	8.44393
	Total	1.9489	137	6.34582
Rest of VIC	2011	7.3542	48	18.42234
	2012	4.5862	29	12.36215
	2013	9.0588	34	17.09145
	2014	7.5385	26	11.46553
	Total	7.2263	137	15.68907
SWVIC	2011	20.6250	48	24.84644
	2012	14.8276	29	16.76746
	2013	16.3235	34	16.37019
	2014	16.8077	26	16.38296
	Total	17.6058	137	19.77348

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	2011	66.6458	48	33.48514
	2012	66.2069	29	33.29133
	2013	62.1471	34	29.44551
	2014	67.8846	26	27.39245
	Total	65.6715	137	31.11958
Total	2011	19.5833	240	32.49193
	2012	17.2414	145	30.53329
	2013	18.2353	170	28.50190
	2014	19.2308	130	29.39560
	Total	18.6861	685	30.49047

Table: The percentage of sales made to the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Other Services Industry Group. No significant changes are evident.

Has there been a change in where the Primary Industries Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	3.0303	33	14.24887
Rest of Aus	1.9697	33	5.71995
Rest of VIC	7.0909	33	15.03197
SWVIC	51.6667	33	37.22119
W'bool	36.2424	33	36.90531
Total	20.0000	165	32.21687

Table: The percentage of sales made to the various locations over the four years.

Most sales, 52% of them, are made to South West Victoria.

Report

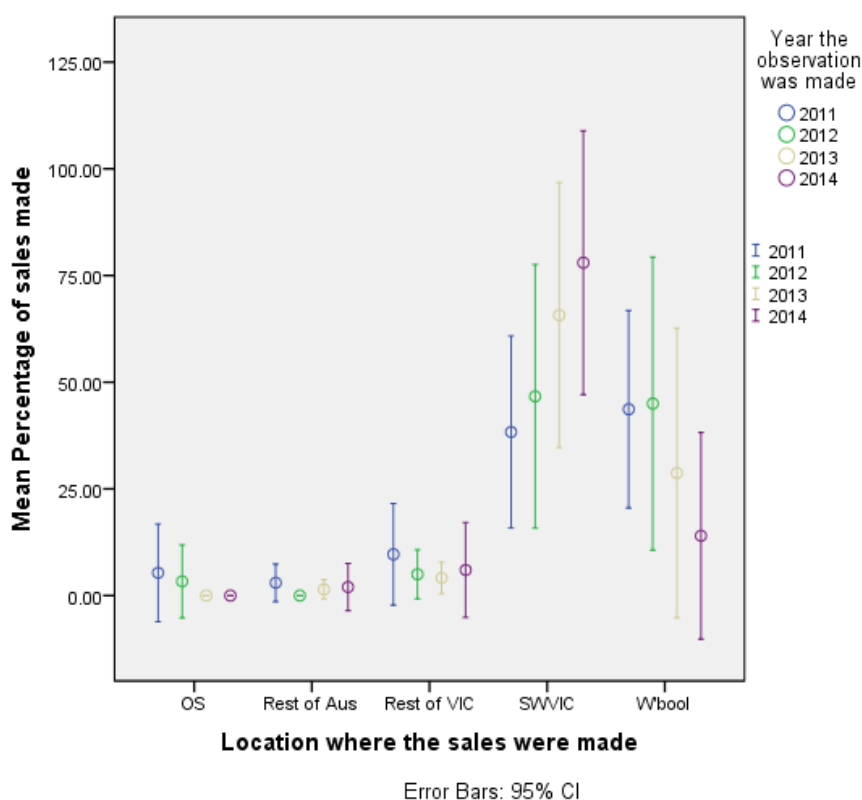
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	5.3333	15	20.65591
	2012	3.3333	6	8.16497
	2013	.0000	7	.00000
	2014	.0000	5	.00000
	Total	3.0303	33	14.24887
Rest of Aus	2011	3.0000	15	7.97317
	2012	.0000	6	.00000
	2013	1.4286	7	2.43975
	2014	2.0000	5	4.47214
	Total	1.9697	33	5.71995
Rest of VIC	2011	9.6667	15	21.50305
	2012	5.0000	6	5.47723
	2013	4.1429	7	3.97612
	2014	6.0000	5	8.94427
	Total	7.0909	33	15.03197
SWVIC	2011	38.3333	15	40.60554
	2012	46.6667	6	29.43920
	2013	65.7143	7	33.59422
	2014	78.0000	5	24.89980

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	Total	51.6667	33	37.22119
	2011	43.6667	15	41.81023
	2012	45.0000	6	32.71085
	2013	28.7143	7	36.70474
	2014	14.0000	5	19.49359
Total	Total	36.2424	33	36.90531
	2011	20.0000	75	33.59134
	2012	20.0000	30	28.52706
	2013	20.0000	35	33.04186
	2014	20.0000	25	32.91403
	Total	20.0000	165	32.21687

Table: The percentage of sales made to the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia

or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Primary Industries Group. No significant changes are evident.

Has there been a change in where the Retail Trade Industries Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	.2919	346	1.79008
Rest of Aus	2.3483	346	7.94734
Rest of VIC	4.2428	346	8.95206
SWVIC	20.9017	346	18.30599
W'bool	70.8974	346	23.87568
Total	19.7364	1730	30.30039

Table: The percentage of sales made to the various locations over the four years.

Most sales, 71% of them, are made to Warrnambool.

Report

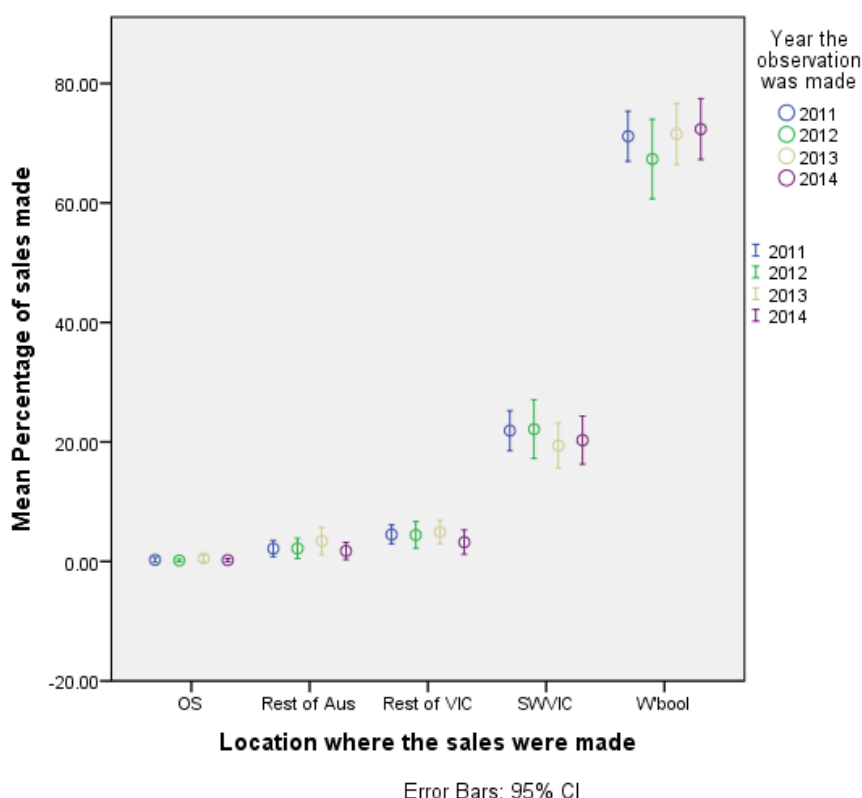
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	.2710	107	2.00269
	2012	.1613	62	.89064
	2013	.4940	83	2.42132
	2014	.2234	94	1.25428
	Total	.2919	346	1.79008
Rest of Aus	2011	2.1542	107	7.15048
	2012	2.1774	62	6.62960
	2013	3.3976	83	10.45191
	2014	1.7553	94	7.03400
	Total	2.3483	346	7.94734
Rest of VIC	2011	4.5140	107	8.21941
	2012	4.4355	62	8.79944
	2013	4.9036	83	8.96282
	2014	3.2234	94	9.85503
	Total	4.2428	346	8.95206
SWVIC	2011	21.8972	107	17.50253
	2012	22.1452	62	19.33132
	2013	19.3735	83	17.17820
	2014	20.2979	94	19.59747
	Total	20.9017	346	18.30599

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	2011	71.1636	107	21.94341
	2012	67.3548	62	26.24231
	2013	71.5301	83	23.43509
	2014	72.3723	94	24.87819
	Total	70.8974	346	23.87568
Total	2011	20.0000	535	29.93073
	2012	19.2548	310	29.58827
	2013	19.9398	415	30.25885
	2014	19.5745	470	31.29476
	Total	19.7364	1730	30.30039

Table: The percentage of sales made to the various locations for each of the four years.



Mean error bar chart presents a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Retail Trade Industries Group. No significant changes are evident.

Has there been a change in where the Service Trades, Electricity, Gas, Construction and Wholesale Trade Industries Group, makes their sales over the four years of measurement?

Report

Percentage of sales made

Location where the sales were made	Mean	N	Std. Deviation
OS	.5882	204	7.06389
Rest of Aus	.9363	204	5.51405
Rest of VIC	4.2500	204	13.27545
SWVIC	26.8873	204	23.22543
W'bool	65.3775	204	27.88152
Total	19.6078	1020	30.54271

Table: The percentage of sales made to the various locations over the four years.

Most sales, 65% of them, are made to Warrnambool.

Report

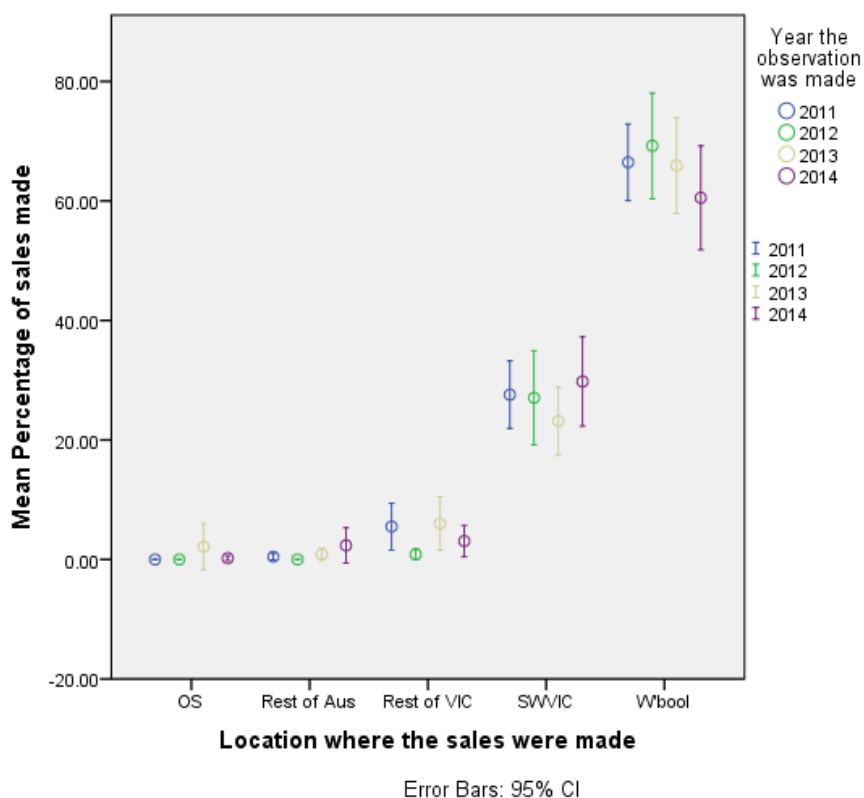
Percentage of sales made

Location where the sales were made	Year the observation was made	Mean	N	Std. Deviation
OS	2011	.0000	68	.00000
	2012	.0000	35	.00000
	2013	2.1154	52	13.90959
	2014	.2041	49	1.42857
	Total	.5882	204	7.06389
Rest of Aus	2011	.4559	68	2.06920
	2012	.0000	35	.00000
	2013	.8654	52	3.66771
	2014	2.3469	49	10.26229
	Total	.9363	204	5.51405
Rest of VIC	2011	5.5000	68	16.20715
	2012	.8571	35	2.56839
	2013	6.0192	52	16.10077
	2014	3.0612	49	9.11822
	Total	4.2500	204	13.27545
SWVIC	2011	27.5735	68	23.38025
	2012	27.0571	35	22.91537
	2013	23.1538	52	20.41086
	2014	29.7755	49	26.06504

2011, 2012, 2013 and 2014 Warrnambool Business Survey

W'bool	Total	26.8873	204	23.22543
	2011	66.4706	68	26.48653
	2012	69.2286	35	25.77400
	2013	65.9231	52	28.80213
	2014	60.5306	49	30.32608
Total	Total	65.3775	204	27.88152
	2011	20.0000	340	30.71095
	2012	19.4286	175	31.07248
	2013	19.6154	260	30.64982
	2014	19.1837	245	29.98926
	Total	19.6078	1020	30.54271

Table: The percentage of sales made to the various locations for each of the four years.



Error bars depict a 95% Confidence interval estimate of the mean proportion of sales made either locally, to south west Victoria, to the rest of Victoria, to the rest of Australia or to overseas consumers for the years 2011, 2012, 2013 and 2014 for the Accommodation, Hospitality & Food/ Beverage Services Industry Group.

Application of the Internet in business

Sales generated through the internet

For all industry groups, has there been a change in the amount of sales generated by the internet over the period 2011, 2012, 2013 and 2014?

Did you use the internet to make sales * Which industry group do you belong to * Year of observation Crosstabulation													
				Which industry group do you belong to									Total
Year of observation					Accommodation, Hospitality & Food/Beverage Services	Business professional and commercial services	Government, Education and Community Services	Manufacturing, transport and storage	Other services	Primary industry	Retail trade	Service trades, electricity, gas, construction and wholesale trade	
2011	Did you use the internet to make sales	n	Count		23	33	40	24	34	8	66	45	273
			% within Which industry group do you belong to		37.7%	45.2%	66.7%	77.4%	70.8%	53.3%	61.7%	66.2%	59.0%
		y	Count		38	38	19	7	10	5	40	20	177
			% within Which industry group do you belong to		62.3%	52.1%	31.7%	22.6%	20.8%	33.3%	37.4%	29.4%	38.2%
		Total		Count	61	73	60	31	48	15	107	68	463
2012	Did you use the internet to make sales	n	Count		14	15	28	11	21	5	26	24	144
			% within Which industry group do you belong to		36.8%	44.1%	66.7%	55.0%	72.4%	83.3%	41.9%	68.6%	54.1%
		y	Count		24	19	13	9	8	1	35	11	120
			% within Which industry group do you belong to		63.2%	55.9%	31.0%	45.0%	27.6%	16.7%	56.5%	31.4%	45.1%
		Total		Count									
2013	Did you use the internet to make sales	n	Count		14	29	30	17	19	5	46	35	195
			% within Which industry group do you belong to		31.1%	53.7%	58.8%	60.7%	55.9%	71.4%	55.4%	67.3%	55.1%
		y	Count		31	25	20	11	15	2	37	17	158
			% within Which industry group do you belong to		68.9%	46.3%	39.2%	39.3%	44.1%	28.6%	44.6%	32.7%	44.6%
		Total		Count									
2014	Did you use the internet to make sales	n	Count		2	16	23	12	11	4	54	32	185
			% within Which industry group do you belong to		28.6%	34.8%	44.2%	54.5%	42.3%	80.0%	57.4%	65.3%	52.7%
		y	Count		5	28	27	10	14	1	39	16	158
			% within Which industry group do you belong to		71.4%	60.9%	51.9%	45.5%	53.8%	20.0%	41.5%	32.7%	45.0%
		Total		Count									

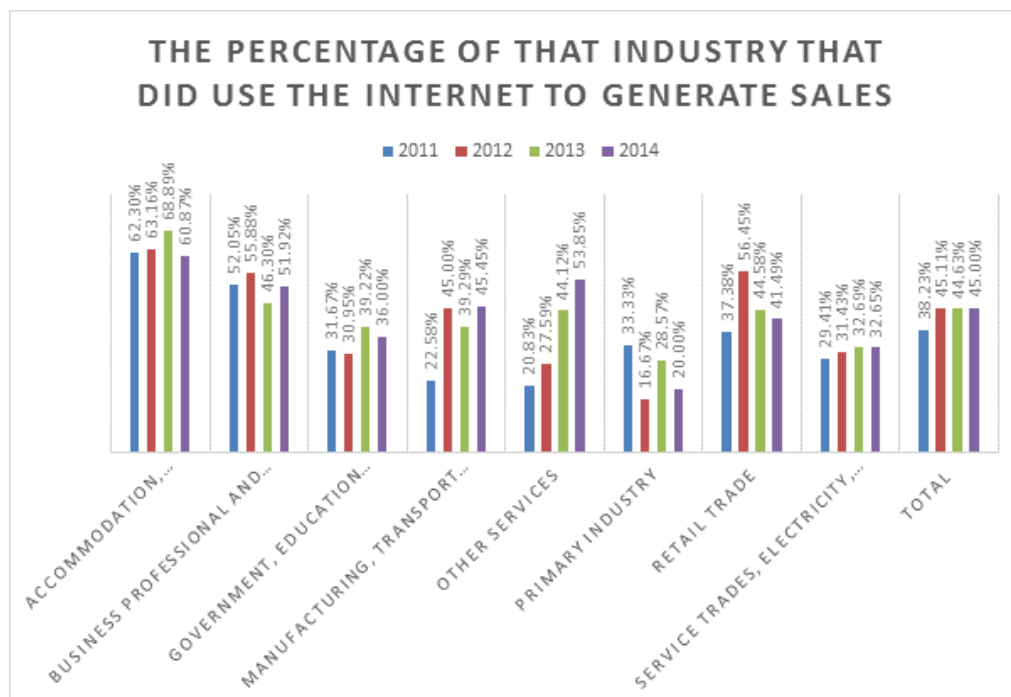


Chart presents the percentage of each specific industry group that do use the internet to make sales. Overall, the percentage remains unchanged and continues to sit at approximately 45%

The Other Services industry group is the only industry group revealing significant increase over time. That is, in 2011, 21% of this industry group indicated they were using the internet to generate sales, this estimate has now risen to 54%. (trending positive: 2011 21%, 2012 28%, 2013 44% and 2014 54%)

Where are people employed?

Where are the people employed?

	Industry group								Total
	Accommodation, Hospitality & Food/Beverage Services	Business professional and commercial services	Government, Education and Community Services	Manufacturing, transport and storage	Other services	Primary industry	Retail trade	Service trades, electricity, gas, construction and wholesale trade	
2011 Generally employs less than 10 people	32 10.0%	54 16.9%	34 10.6%	20 6.3%	39 12.2%	11 3.4%	79 24.7%	51 15.9%	320 100.0%
	52.5%	74.0%	56.7%	64.5%	81.3%	73.3%	73.8%	75.0%	69.1%
2011 Employs between 10 - 19 people	15 20.3%	13 17.6%	10 13.5%	5 6.8%	6 8.1%	4 5.4%	13 17.6%	8 10.8%	74 100.0%
	24.6%	17.8%	16.7%	16.1%	12.5%	26.7%	12.1%	11.8%	16.0%
2011 Employs between 20 - 49 people	12 28.6%	4 9.5%	3 7.1%	2 4.8%	2 4.8%	0 0.0%	12 28.6%	7 16.7%	42 100.0%
	19.7%	5.5%	5.0%	6.5%	4.2%	0.0%	11.2%	10.3%	9.1%
2011 Employs between 50 - 99 people	1 7.1%	1 7.1%	6 42.9%	2 14.3%	0 0.0%	0 0.0%	3 21.4%	1 7.1%	14 100.0%
	1.6%	1.4%	10.0%	6.5%	0.0%	0.0%	2.8%	1.5%	3.0%
2011 Employs between 100 - 199 people	1 14.3%	1 14.3%	4 57.1%	1 14.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	7 100.0%
	1.6%	1.4%	6.7%	3.2%	0.0%	0.0%	0.0%	0.0%	1.5%
2011 Employs more than 199 people	0 0.0%	0 0.0%	3 60.0%	1 20.0%	0 0.0%	0 0.0%	0 0.0%	1 20.0%	5 100.0%
	0.0%	0.0%	5.0%	3.2%	0.0%	0.0%	0.0%	1.5%	1.1%
	61 13.2%	73 15.8%	60 13.0%	31 6.7%	48 10.4%	15 3.2%	107 23.1%	68 14.7%	463 100.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table: 2011 employment summary

	Industry group								Total
	Accommodation, Hospitality & Food/Beverage Services	Business professional and commercial services	Government, Education and Community Services	Manufacturing, transport and storage	Other services	Primary industry	Retail trade	Service trades, electricity, gas, construction and wholesale trade	
2012 Generally employs less than 10 people	22	25	21	11	18	5	48	28	178
	12.4%	14.0%	11.8%	6.2%	10.1%	2.8%	27.0%	15.7%	100.0%
	57.9%	73.5%	50.0%	55.0%	62.1%	83.3%	77.4%	80.0%	66.9%
2012 Employs between 10 - 19 people	9	3	6	3	9	1	4	3	38
	23.7%	7.9%	15.8%	7.9%	23.7%	2.6%	10.5%	7.9%	100.0%
	23.7%	8.8%	14.3%	15.0%	31.0%	16.7%	6.5%	8.6%	14.3%
2012 Employs between 20 - 49 people	7	5	5	4	0	0	9	3	33
	21.2%	15.2%	15.2%	12.1%	0.0%	0.0%	27.3%	9.1%	100.0%
	18.4%	14.7%	11.9%	20.0%	0.0%	0.0%	14.5%	8.6%	12.4%
2012 Employs between 50 - 99 people	0	1	5	1	1	0	1	0	9
	0.0%	11.1%	55.6%	11.1%	11.1%	0.0%	11.1%	0.0%	100.0%
	0.0%	2.9%	11.9%	5.0%	3.4%	0.0%	1.6%	0.0%	3.4%
2012 Employs between 100 - 199 people	0	0	3	1	0	0	0	0	4
	0.0%	0.0%	75.0%	25.0%	0.0%	0.0%	0.0%	0.0%	100.0%
	0.0%	0.0%	7.1%	5.0%	0.0%	0.0%	0.0%	0.0%	1.5%
2012 Employs more than 199 people	0	0	2	0	1	0	0	1	4
	0.0%	0.0%	50.0%	0.0%	25.0%	0.0%	0.0%	25.0%	100.0%
	0.0%	0.0%	4.8%	0.0%	3.4%	0.0%	0.0%	2.9%	1.5%
2012 TOTAL	38	34	42	20	29	6	62	35	266
	14.3%	12.8%	15.8%	7.5%	10.9%	2.3%	23.3%	13.2%	100.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table: 2012 employment summary

	Industry group								Total
	Accommodation, Hospitality & Food/Beverage Services	Business professional and commercial services	Government, Education and Community Services	Manufacturing, transport and storage	Other services	Primary industry	Retail trade	Service trades, electricity, gas, construction and wholesale trade	
2013 Generally employs less than 10 people	29	38	28	17	27	5	69	40	253
	11.5%	15.0%	11.1%	6.7%	10.7%	2.0%	27.3%	15.8%	100.0%
	64.4%	70.4%	54.9%	60.7%	79.4%	71.4%	83.1%	76.9%	71.5%
2013 Employs between 10 - 19 people	9	9	4	7	5	1	7	5	47
	19.1%	19.1%	8.5%	14.9%	10.6%	2.1%	14.9%	10.6%	100.0%
	20.0%	16.7%	7.8%	25.0%	14.7%	14.3%	8.4%	9.6%	13.3%
2013 Employs between 20 - 49 people	7	7	7	1	1	1	5	5	34
	20.6%	20.6%	20.6%	2.9%	2.9%	2.9%	14.7%	14.7%	100.0%
	15.6%	13.0%	13.7%	3.6%	2.9%	14.3%	6.0%	9.6%	9.6%
2013 Employs between 50 - 99 people	0	0	7	1	1	0	2	1	12
	0.0%	0.0%	58.3%	8.3%	8.3%	0.0%	16.7%	8.3%	100.0%
	0.0%	0.0%	13.7%	3.6%	2.9%	0.0%	2.4%	1.9%	3.4%
2013 Employs between 100 - 199 people	0	0	2	1	0	0	0	0	3
	0.0%	0.0%	66.7%	33.3%	0.0%	0.0%	0.0%	0.0%	100.0%
	0.0%	0.0%	3.9%	3.6%	0.0%	0.0%	0.0%	0.0%	.8%
2013 Employs more than 199 people	0	0	3	1	0	0	0	1	5
	0.0%	0.0%	60.0%	20.0%	0.0%	0.0%	0.0%	20.0%	100.0%
	0.0%	0.0%	5.9%	3.6%	0.0%	0.0%	0.0%	1.9%	1.4%
2013 TOTAL	45	54	51	28	34	7	83	52	354
	12.7%	15.3%	14.4%	7.9%	9.6%	2.0%	23.4%	14.7%	100.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table: 2013 employment summary

	Industry group								Total
	Accommodation, Hospitality & Food/Beverage Services	Business professional and commercial services	Government, Education and Community Services	Manufacturing, transport and storage	Other services	Primary industry	Retail trade	Service trades, electricity, gas, construction and wholesale trade	
2014 Generally employs less than 10 people	31 12.8% 67.4%	33 13.6% 63.5%	22 9.1% 44.0%	16 6.6% 72.7%	17 7.0% 65.4%	2 .8% 40.0%	79 32.5% 84.0%	38 15.6% 77.6%	243 100.0% 69.2%
2014 Employs between 10 - 19 people	5 9.8% 10.9%	14 27.5% 26.9%	10 19.6% 20.0%	4 7.8% 18.2%	6 11.8% 23.1%	3 5.9% 60.0%	6 11.8% 6.4%	3 5.9% 6.1%	51 100.0% 14.5%
2014 Employs between 20 - 49 people	9 25.0% 19.6%	5 13.9% 9.6%	5 13.9% 10.0%	0 0.0% 0.0%	3 8.3% 11.5%	0 0.0% 0.0%	6 16.7% 6.4%	6 16.7% 12.2%	36 100.0% 10.3%
2014 Employs between 50 - 99 people	1 7.7% 2.2%	0 0.0% 0.0%	7 53.8% 14.0%	1 7.7% 4.5%	0 0.0% 0.0%	0 0.0% 0.0%	3 23.1% 3.2%	1 7.7% 2.0%	13 100.0% 3.7%
2014 Employs between 100 - 199 people	0 0.0% 0.0%	0 0.0% 0.0%	1 100.0% 2.0%	0 0.0% 0.0%	0 0.0% 0.0%	0 0.0% 0.0%	0 0.0% 0.0%	0 0.0% 0.0%	1 100.0% .3%
2014 Employs more than 199 people	0 0.0% 0.0%	0 0.0% 0.0%	5 71.4% 10.0%	1 14.3% 4.5%	0 0.0% 0.0%	0 0.0% 0.0%	0 0.0% 0.0%	1 14.3% 2.0%	7 100.0% 2.0%
2014 TOTAL	46 13.1% 100.0%	52 14.8% 100.0%	50 14.2% 100.0%	22 6.3% 100.0%	26 7.4% 100.0%	5 1.4% 100.0%	94 26.8% 100.0%	49 14.0% 100.0%	351 100.0% 100.0%

Table: 2014 employment summary

	Industry group								Total
	Accommodation, Hospitality & Food/Beverage Services	Business professional and commercial services	Government, Education and Community Services	Manufacturing, transport and storage	Other services	Primary industry	Retail trade	Service trades, electricity, gas, construction and wholesale trade	
ALL YEARS Generally employs less than 10 people	114 11.5% 60.0%	150 15.1% 70.4%	105 10.6% 51.7%	64 6.4% 63.4%	101 10.2% 73.7%	23 2.3% 69.7%	275 27.7% 79.5%	157 15.8% 77.0%	994 100.0% 69.3%
ALL YEARS Employs between 10 - 19 people	38 18.1% 20.0%	39 18.6% 18.3%	30 14.3% 14.8%	19 9.0% 18.8%	26 12.4% 19.0%	9 4.3% 27.3%	30 14.3% 8.7%	19 9.0% 9.3%	210 100.0% 14.6%
ALL YEARS Employs between 20 - 49 people	35 24.1% 18.4%	21 14.5% 9.9%	20 13.8% 9.9%	7 4.8% 6.9%	6 4.1% 4.4%	1 .7% 3.0%	32 22.1% 9.2%	21 14.5% 10.3%	145 100.0% 10.1%
ALL YEARS Employs between 50 - 99 people	2 4.2% 1.1%	2 4.2% .9%	25 52.1% 12.3%	5 10.4% 5.0%	2 4.2% 1.5%	0 0.0% 0.0%	9 18.8% 2.6%	3 6.3% 1.5%	48 100.0% 3.3%
ALL YEARS Employs between 100 - 199 people	1 6.7% .5%	1 6.7% .5%	10 66.7% 4.9%	3 20.0% 3.0%	0 0.0% 0.0%	0 0.0% 0.0%	0 0.0% 0.0%	0 0.0% 0.0%	15 100.0% 1.0%
ALL YEARS Employs more than 199 people	0 0.0% 0.0%	0 0.0% 0.0%	13 61.9% 6.4%	3 14.3% 3.0%	1 4.8% .7%	0 0.0% 0.0%	0 0.0% 0.0%	4 19.0% 2.0%	21 100.0% 1.5%
ALL YEARS TOTAL	190 13.2% 100.0%	213 14.9% 100.0%	203 14.2% 100.0%	101 7.0% 100.0%	137 9.6% 100.0%	33 2.3% 100.0%	346 24.1% 100.0%	204 14.2% 100.0%	1434 100.0% 100.0%

Table: ALL YEARS employment summary

Most industries (69.3 %) employ less than 10 people. 12 % of Government, Education and Community Service organisations employ 50 to 99 staff, with 6.4 % of these organisations, employing 200 or more staff. 18 % of Accommodation, Hospitality and Food and Beverage Service organisations employ 10 to 19 staff but most, 60 % of them, are small operators employing less than 10 staff. 88.2 % of our Retail trade businesses employ less than 20 staff.

Barriers to employment

Has there been any change in business opinion overall regarding barriers to employment between 2011 and 2014?

%							
	All	Business closing	Cash flow constraints	Changes / regulations	Cost of training	Employment conditions	Increased productivity due to technical advancement
All	100	0.55	9.05	4.76	4.04	4.72	1.98
2011	100	0.71	9.15	5.28	3.86	5.08	1.52
2012	100	0.65	9.49	4.26	3.44	5.07	3.11
2013	100	0.26	8.59	4.49	4.74	3.97	1.67
2014	100	0.45	9.98	4.08	3.63	5.75	1.36
%							
		Lack of confidence in future	Lack of funds / money	Lack of skilled staff / finding staff	Lack of work / sales	Profitability	Superannuation costs
All		6.69	10.91	17.05	22.06	14.53	3.66
2011		4.78	9.65	19.51	21.65	15.45	3.35
2012		6.87	11.78	16.69	22.26	12.77	3.60
2013		8.97	11.79	14.23	22.44	14.74	4.10
2014		7.87	18.09	12.41	21.99	16.94	3.33

Table % of Row

Column chart: 95% confidence intervals for row totals are presented.

This year, the main employment barriers identified are: Lack of work/sales (22 % of responses), Lack of funds / money (18% of responses), Profitability (17% of responses) and Lack of skilled staff/finding staff (12 % of responses). Over the 4 years of data collection, the number of skilled staff is decreasing as a barrier to employment, however, a lack of funds is increasing (10% of businesses in 2011, and now 18% in 2014, a significant increase).

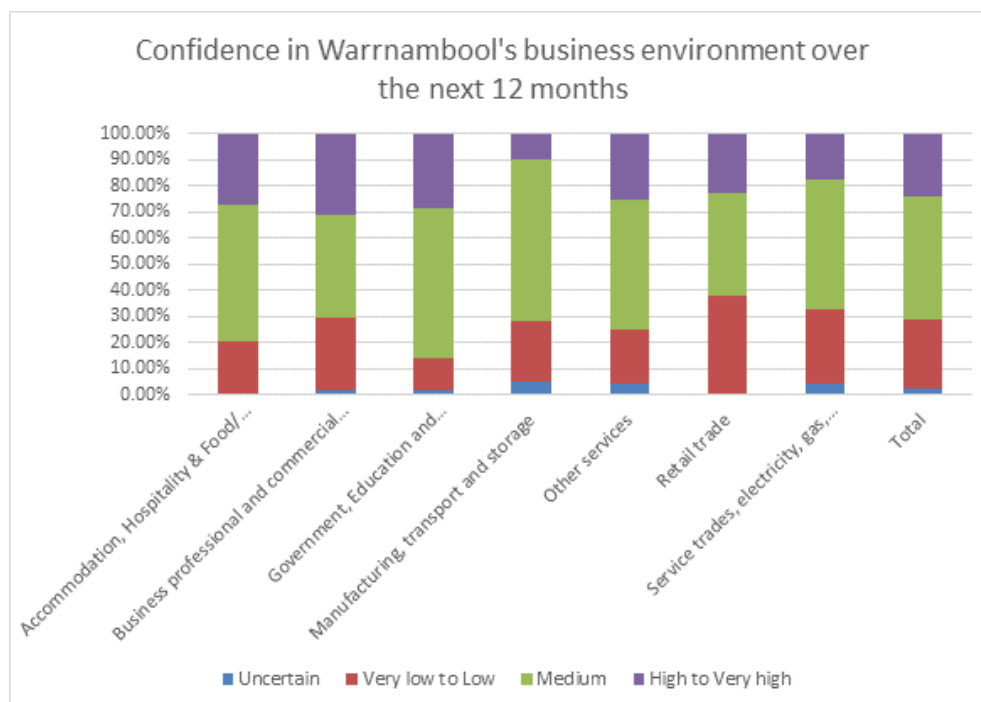
Industry specific estimates of confidence in the Warrnambool business environment over the next 12 months

	Accommodation, Hospitality & Food/Beverage Services	Business professional and commercial services	Government, Education and Community Services	Manufacturing, transport and storage	Other services	Primary industry	Retail trade	Service trades, electricity, gas, construction and wholesale trade	Total
Uncertain	0.00%	1.92%	2.00%	4.55%	3.85%	40.00%	0.00%	4.08%	2.28%
Very low to Low	19.57%	26.92%	12.00%	22.73%	19.23%	0.00%	37.23%	26.53%	25.36%
Medium	50.00%	38.46%	56.00%	59.09%	46.15%	40.00%	38.30%	46.94%	45.30%
High to Very high	26.09%	30.77%	28.00%	9.09%	23.08%	20.00%	22.34%	16.33%	23.36%

Table % of column

There were insufficient responses from the Primary Industries group to draw any conclusions regarding estimated confidence (n 5).

Comment [AP3]: Should the total column of this table reconcile with the table on p. 19.



This year, 69% of all businesses rate their expectations of the Warrnambool business environment as at least, medium. With 23% of all businesses indicating their expectations are high to very high.

2011, 2012, 2013 and 2014 Warrnambool Business Survey

REFERENCES

ASMEA. (2012). SME Facts. 2012, from <http://www.asmea.org.au/SMEFacts>

MacGregor, R., & Kartiwi, M. (2010). Perception of barriers to e-commerce adoption in SMEs in developing and developed country: a comparison between Australia and Indonesia. *Journal of Electronic Commerce in Organizations*, (8:1), pp 61-82.