



Sutherland Shire Council

Business Survey – 2024

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Methodology and Sample



Objectives

This 2024 survey is part of a biennial local business engagement, which began in 2012. Council undertakes the survey online with a sample of local businesses.

Data collection

Sutherland Shire Council updated the 2022 questionnaire for use in 2024. A copy of the 2024 questionnaire is provided in Appendix 2.

Sample was sourced from the following:

- ABR database (approximately 35,000 businesses in the Shire). All listed emails were contacted to participate in the survey and best efforts were made by Council to reach businesses through a greater distribution this year (online and physically). 249 surveys were completed with 2,062 Aware visits to the site.
- The online survey was also available to local LGA business operators and owners via Council's public consultation website 'Join the Conversation'.

The survey was open from the 1st – 30th November 2024.

Sample

N=249 surveys were completed. A sample size of 249 provides a maximum sampling error of plus or minus 6.2% at 95% confidence. This means that if the survey was replicated with a new universe of N=249 businesses, that 19 times out of 20 we would expect to see the same results +/- 6.2% (for instance, an answer 'yes' [50%] to a question could vary from 44% to 56%).

Despite efforts, the number of completes generated continues to reduce (e.g.: 249 in 2024, 302 in 2022, 404 in 2020 versus 660 in 2018).

Data analysis

The data within this report was analysed using Q Professional.

Percentages

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

Summary Findings



Snapshot of the Business Profile in the Sutherland Shire:

The Sutherland Shire businesses included in the 2024 sample represent a diverse range of industries, with professional/scientific/technical services, retail trade, and healthcare & social assistance being the most prominent sectors in this year's research. Many businesses are small-scale, with 49% structured as privately owned companies and 33% operating as sole traders.

Turnover and Financial Performance:

- The average annual turnover for businesses in the Shire in the 2023/24 financial year was approximately **\$935,000**, reflecting a slight decline from approx. \$1,152,000 in 2022:
 - The turnover is positively correlated with the length of business operation, with businesses operating for over 10 years averaging a significantly higher annual turnover of **\$1.4 million**.
- Predictions for the 2024/25 financial year suggest continued optimism, with a modest increase in predicted turnover of almost 10% above the 2023/24 financial year.

Current Business Confidence:

Overall, businesses in the Shire show a positive outlook, with **87% feeling at least somewhat confident** about their prospects for the next 12 months. However, confidence varies by sector, with industries like retail trade and recreation/visitor services showing lower confidence compared to professional services and construction (see also Slide 9).

Workforce Composition:

On average, businesses in the Shire employ **16.3 workers**, an increase from 15.2 in 2022. This workforce includes a mix of full-time (35%), casual (18%), and part-time (15%) roles, with an increase in casual (18%) and contractor (21%) positions suggesting a shift to more flexible staffing models.

Sales Distribution:

- Local sales remain dominant, with an average of **49% of turnover generated per business within the Shire**.
- On average, online sales account for an average of **15% of turnover per business** (based on all businesses), consistent with previous years. However, incidence of businesses reporting online sales has increased from 33% in 2020 to 40% in 2024.

Key Challenges:

Economic Shifts



A number of businesses in the Sutherland Shire are concerned about rising costs, with 52% citing this as their most significant challenge for the next five years. There are also concerns about broader economic fluctuations, with 42% of businesses expressing unease over how changes in the economy might impact their operations (up from 32% in 2022). Customer retention remains another key concern for the next five years, mentioned by 38% of respondents (up from 25% in 2022). Furthermore, 19% believe a downturn in industry demand/sales will be a significant challenge to them.

Talent Gaps



The ongoing issue of skill shortages continues to impact businesses, with 38% identifying difficulties in finding suitable staff and 26% stating it is likely to be a significant challenge in the next five years. The most affected sectors include construction/manufacturing/mining and healthcare, where the demand for skilled tradespeople (e.g., mechanics) and allied health professionals (e.g., occupational therapists) remains. Engineers also remain a sought-after skillset. These shortages are not only potentially limiting business growth but also likely placing additional strain on existing staff.

Customer Access and Regulatory Barriers



We have noted above that customer retention is a key concern for the next five years, mentioned by 38% of respondents (up from 25% in 2022). Furthermore, declining sales have become a more common challenge of doing business within the Sutherland Shire, steadily increasing from 9% in 2018 to 17% in 2024. This trend is particularly evident in retail businesses, where other factors like traffic congestion and limited parking opportunities were also more likely to be mentioned.

Additionally, 15% of businesses reported that policies, procedures, and regulations imposed by the government were a challenge for them doing business in the Shire. Whilst these mentions have increased from 5% in 2018 to 15% in 2024, this may be due in part to a small wording change in 2024.

Opportunities:

Economic Support



We noted on the previous slide that 52% of businesses cited 'rising costs' as their most significant challenge for the next five years. And amongst those with low business confidence, rent was their biggest concern for the future (47% - compared to 22% for those with high business confidence). There has also been an increase amongst those who say they have been adversely affected by Council's policies/procedures because of 'rates/costs are too high'.

When asked how Council could support businesses, half (51%) of respondents suggested 'small business grants/financial assistance/ funding'. Possible options could include:

- Subsidised rents (26% stated the price of rent is a significant challenge)
- Access to low-interest loans (Construction businesses were more likely to experience challenges securing business loans).

Talent Strategy and Workforce Development



As noted on the previous slide, workforce development presents another major opportunity, with 38% experiencing skill shortages and 26% stating it is likely to be a significant challenge in the next five years.

Encouragingly, 27% of business owners/operators indicated plans to begin or continue studies in the next two years (for themselves), Council could potentially play a role in facilitating access to upskilling programs. This may be particularly relevant in addressing skill shortages in high-demand areas such as engineering, digital marketing, and trades.

By partnering with local training institutions and offering apprenticeships or incentives for relocation, Council could potentially help businesses overcome staffing challenges and ensure a steady pipeline of skilled workers. Additionally, promoting local apprenticeship and internship programs could help bridge the skills gap while providing career opportunities for residents.

Opportunities:

Digital Presence



Expanding an online presence has been recognised by 44% of businesses as a significant growth opportunity over the next five years, up from 31% in 2022. This highlights a growing awareness of the potential for digital transformation in reaching broader audiences. And there are already encouraging signs:

- The incidence of businesses generating any of their sales from online channels has increased from 33% in 2020 to 40% in 2024
- Businesses are already leveraging platforms like Facebook and Instagram to promote their services to potential visitors from outside the Shire, with 77% using social media and 86% maintaining websites.

Supporting businesses in their digital journey could provide growth potential.

Place Activation



We noted on Slide 6 that customer retention is a key concern for the next five years – and declining sales have become a more common challenge of doing business within the Sutherland Shire.

Thus, it is perhaps not surprising that:

- 13% of businesses feel a lack of marketing and promotional opportunities is a challenge of doing business in the Shire
- When asked about Council facilitated activations that increase customer visitation, a nett subtotal of 94% of businesses selected at least one.

However, in 2024 there has been a significant increase in support for business events/expos and expos in general, while support for consumer-focused activations such as food & wine and beach/surf activities has significantly decreased from 2022. Perhaps businesses are now more interested in direct B2B activations rather than in consumer activations designed to indirectly support businesses – which may reflect in part the small increase in white-collar businesses (i.e.: Professional/scientific/technical services, Administration and support services, Education and training, and Personal services) in 2024. This could be an area for follow-up enquiry with businesses, to better understand this apparent shift.

Opportunities – Focus on Businesses with LOW Confidence:

Businesses with Low Confidence

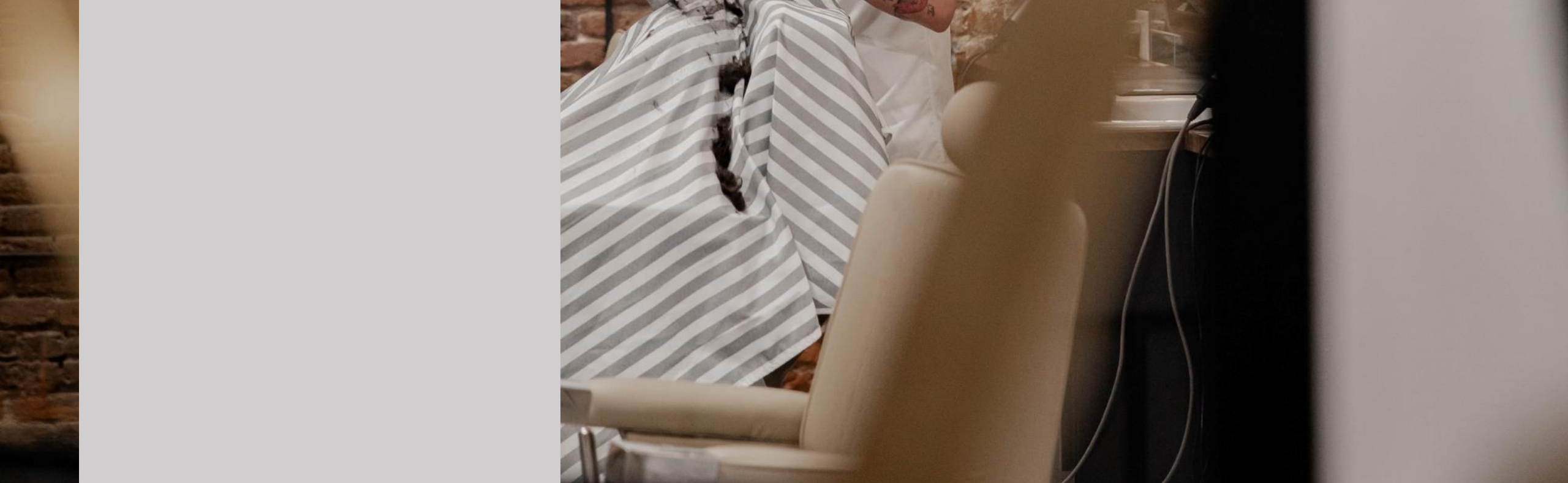
31 of our 249 respondents – so 12% of businesses – indicated that they were 'not very/not at all confident' about their business prospects for the next 12 months. These 31 businesses are seemingly more likely than the positive businesses to be:

- 'Arts and Recreation/Tourism/Accommodation and food services' and to some extent, 'retail trade'
- Have a higher number of staff (i.e.: they are not skewed towards sole traders)
- Provide products to consumers – and a little less likely to provide products/services to business.

However, in a sense this low confidence cohort is quite similar to the overall business profile, which makes it hard to identify them based on particular observable characteristics.

What sets these businesses apart from the rest in terms of Challenges and Opportunities is:

- **Challenges of doing business in the Shire:** They are significantly less concerned about 'recruiting and retaining good staff' (based on the above, they tend to have a higher number of staff already, which may explain this) and significantly more concerned about 'declining sales'. Whilst not significant, they are also noticeably more likely to select a number of other factors, such as 'attracting and maintaining customers', 'lack of marketing and promotional opportunities', and 'policies/ procedures/regulations imposed by government'
- **Business challenges in the next five years:** Again, they are significantly less concerned about 'finding suitable/qualified staff'. However, they are significantly more likely to identify 'rent', 'downturn in industry/sales' and the 'impacts of COVID' as significant challenges for them doing business in the Sutherland Shire.
- **Business opportunities in the next five years:** The low confidence businesses are twice as likely as those with high business confidence to select none of the possible business opportunities (26% v 13%), which is concerning. Consistent with the above points, they are not interested in increasing their staff – but they are significantly more likely to want to recover from the impacts of COVID, suggesting the COVID period may have impacted them more than most.



Doing Business in the Sutherland Shire

This section explores details of businesses operating within the Sutherland Shire, challenges being faced and suggestions on how Sutherland Shire Council can better support local businesses.

Section One

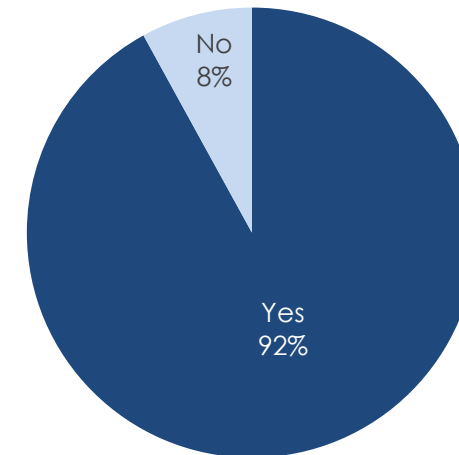
Suburb of Primary Operation

Five suburbs for just over half of the business respondents – with Cronulla (11%), Miranda (11%) and Sutherland (11%) being the top locations for business operation.

Consistent with previous years, 92% of business respondents stated that they also live within the Sutherland Shire.

Suburb of operation	N=249	Suburb of operation	N=249
Cronulla	11%	Barden Ridge	1%
Miranda	11%	Bundeena	1%
Sutherland	11%	Illawong	1%
Caringbah	10%	Loftus	1%
Kirrawee	9%	Menai Central	1%
Engadine	5%	Sylvania	1%
GyMEA	4%	Alfords Point	<1%
Taren Point	4%	Burraneer	<1%
Caringbah South	3%	Haymarket	<1%
Jannali	3%	Helensburgh	<1%
Bangor	2%	Kareela	<1%
Bonnet Bay	2%	Lilli Pilli	<1%
Como	2%	Lucas Heights	<1%
GyMEA Bay	2%	Maianbar	<1%
Heathcote	2%	Oyster Bay	<1%
Kurnell	2%	Port Hacking	<1%
Menai	2%	Sandy Point	<1%
Woolooware	2%	Sylvania Southgate	<1%
Woronora	2%	Sylvania Waters	<1%

Do you live in the Sutherland Shire?



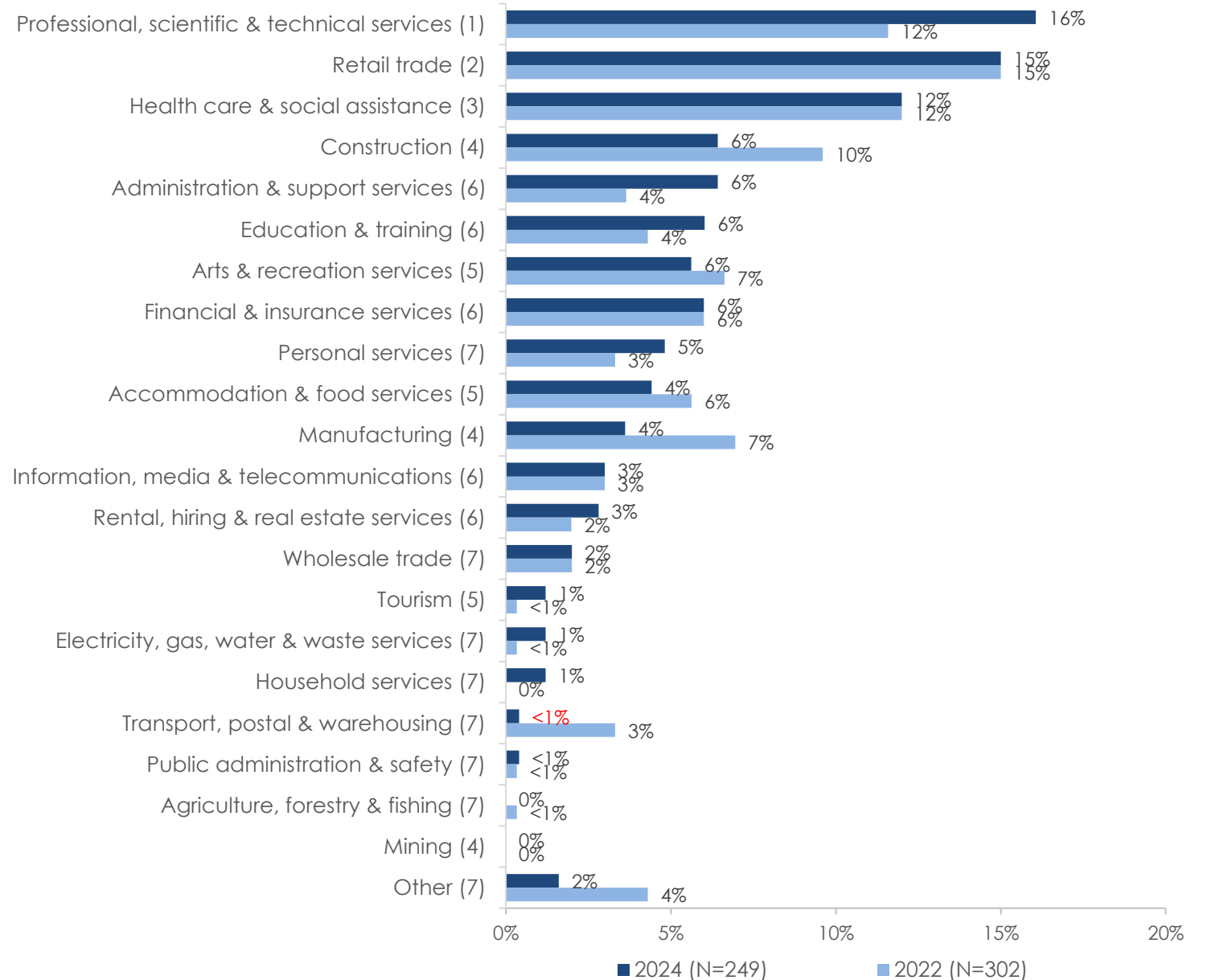
	2024	2022	2020	2018	2016
Yes	92%	95%	96%	94%	94%
Base	249	297	404	660	715

Business Sector

Consistent with 2022, the top three industries captured in the sample this year include; Professional, Scientific and Technical Services, Retail Trade, and Health care & Social Assistance.

Whilst the industry profile is generally similar across 2024 and 2022, there is a sense that this year there are:

- Fewer blue-collar businesses (e.g.: slight declines in Construction, Manufacturing, and Transport/postal/warehousing)
- More white-collar businesses (e.g.: slight increases for Professional/scientific/technical services, Administration and support services, Education and training, and Personal services).



Business sector groups (for cross analysis):
 (1) Professional, scientific & technical service
 (2) Retail trade
 (3) Health care & social assistance
 (4) Construction, manufacturing and mining
 (5) Recreation and visitor services
 (6) Other white-collar services
 (7) Other

Q. Which one main business sector do you operate in?

A significantly higher/lower percentage (compared to 2022) 12

Business Sector – Industry Representation Summary

Industry groups that form close to 60% of businesses within the Sutherland Shire are listed below.

Construction businesses account for 22% of businesses within the Sutherland Shire (first column of data), however, the 2024 survey sample only contains 6% of construction businesses (second column). We have a larger representation of Health Care/Social Assistance, and Retail Trade.

Industry group	Representation in the Sutherland Shire*	Representation in the 2024 survey	Representation in the 2022 survey	Representation in the 2020 survey	Representation in the 2018 survey	Representation in the 2016 survey	Representation in the 2014 survey
Construction	22%	6%	10%	7%	7%	7%	7%
Professional, Scientific & Technical Services	16%	16%	12%	13%	17%	16%	14%
Health Care and Social Assistance	7%	12%	12%	8%	12%	7%	10%
Retail Trade	6%	15%	15%	8%	10%	10%	10%
Manufacturing	4%	4%	7%	2%	4%	3%	4%
Total	55%	53%	56%	38%	50%	43%	45%

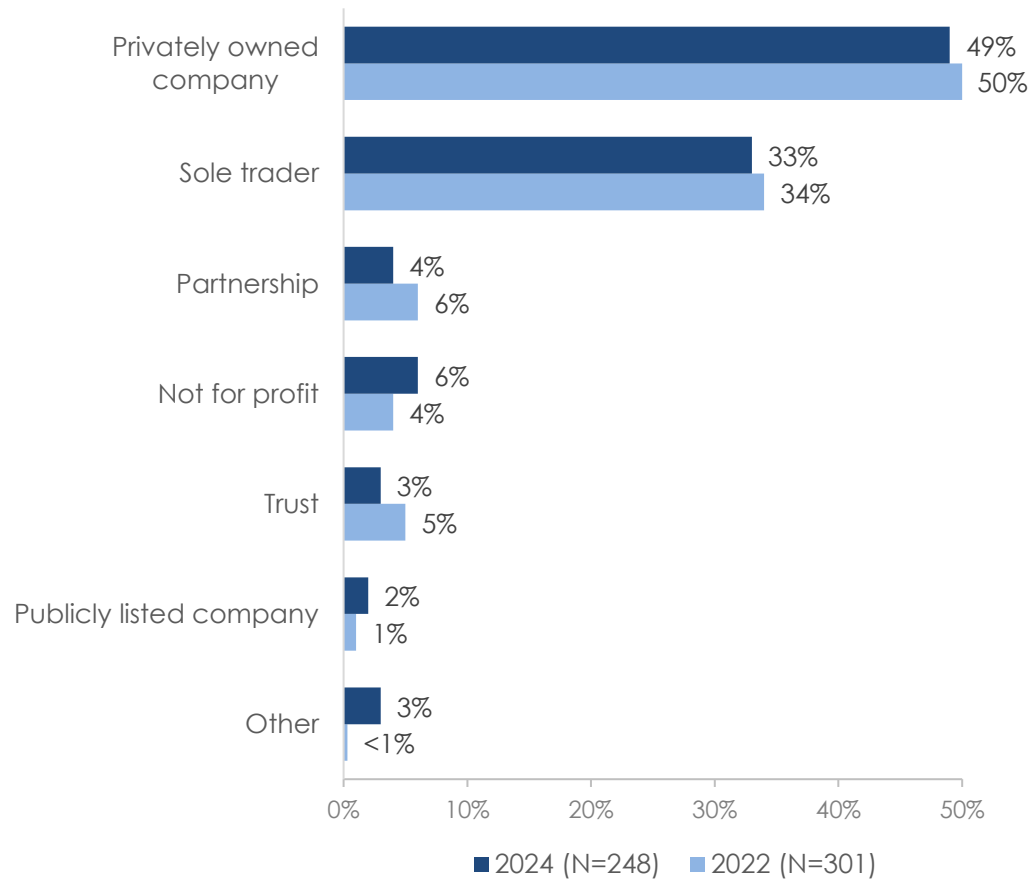
*Source: <http://economy.id.com.au/sutherland/number-of-businesses-by-industry>

Business Structure and Length of Operation

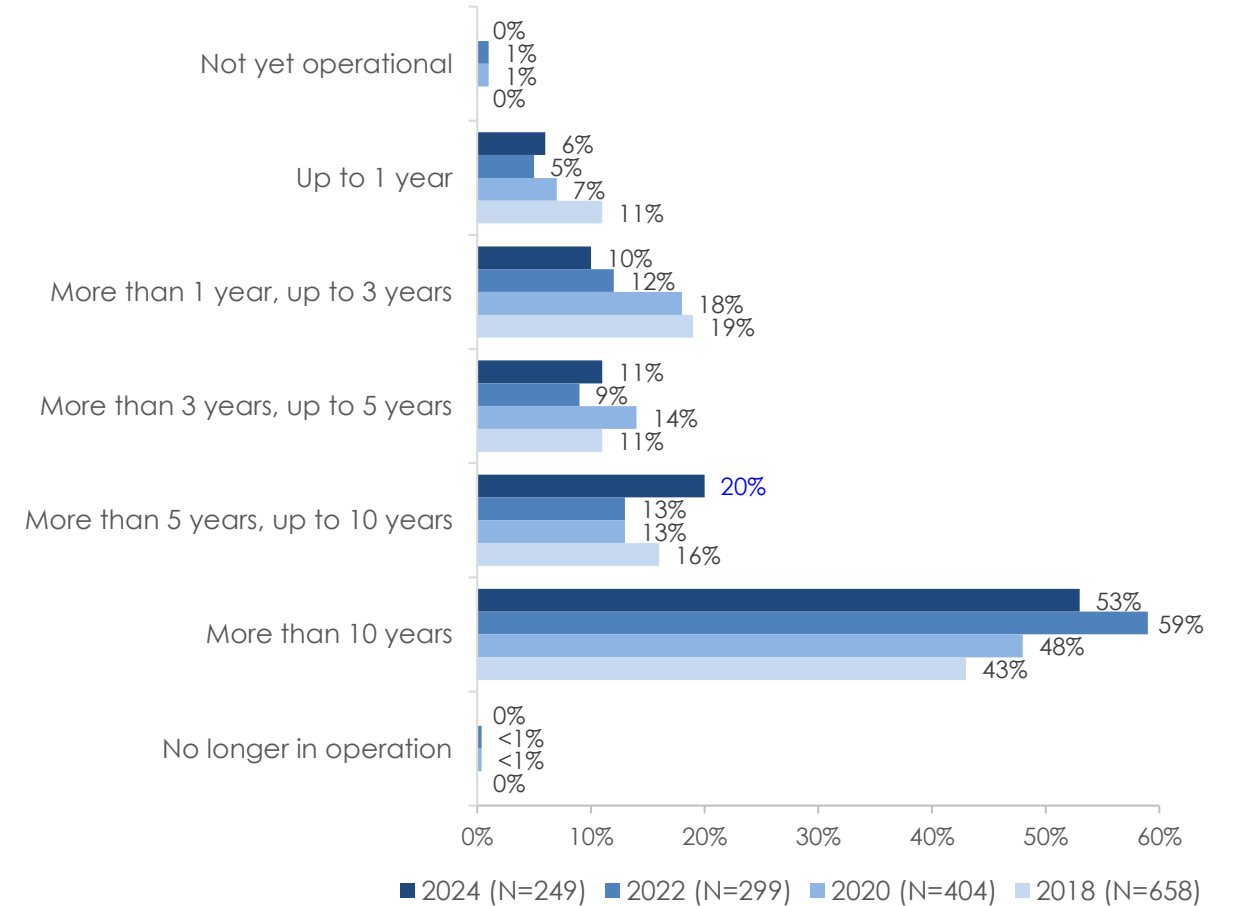
Representation of privately owned companies (49%) and sole traders (33%) remains in line with 2022.

A significant increase in businesses in operation between 5 and 10 years.

Business Structure



Length of Operation

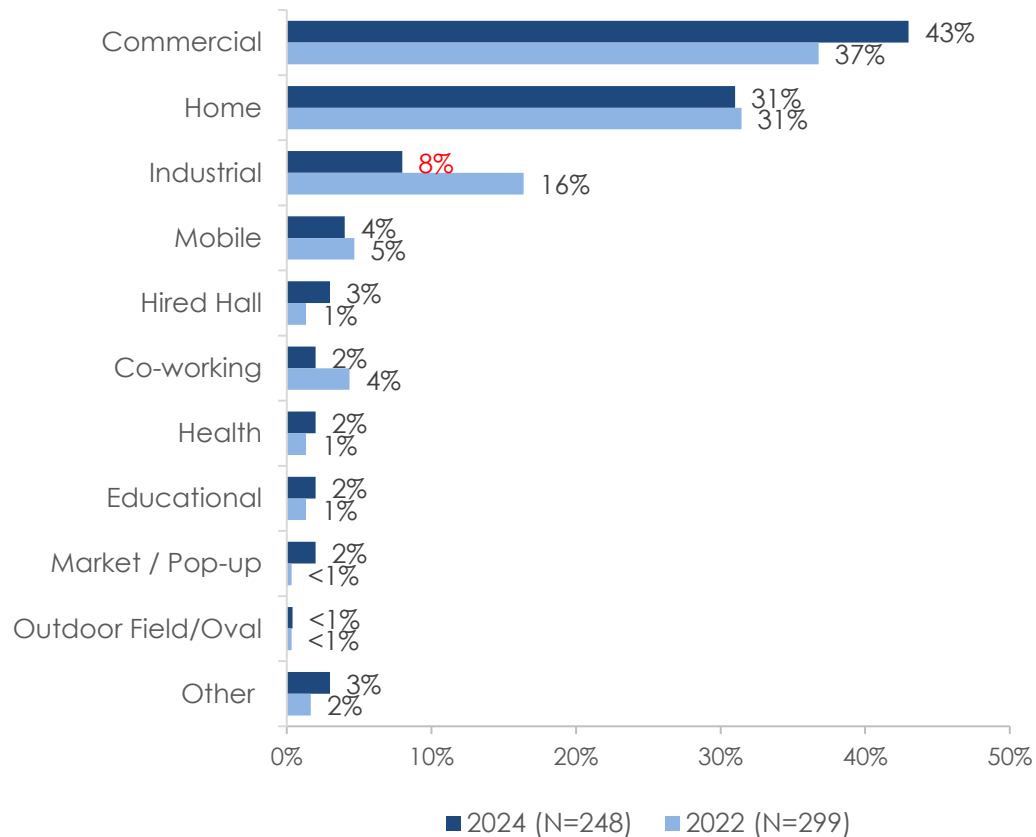


Business Premise and Reason for Location

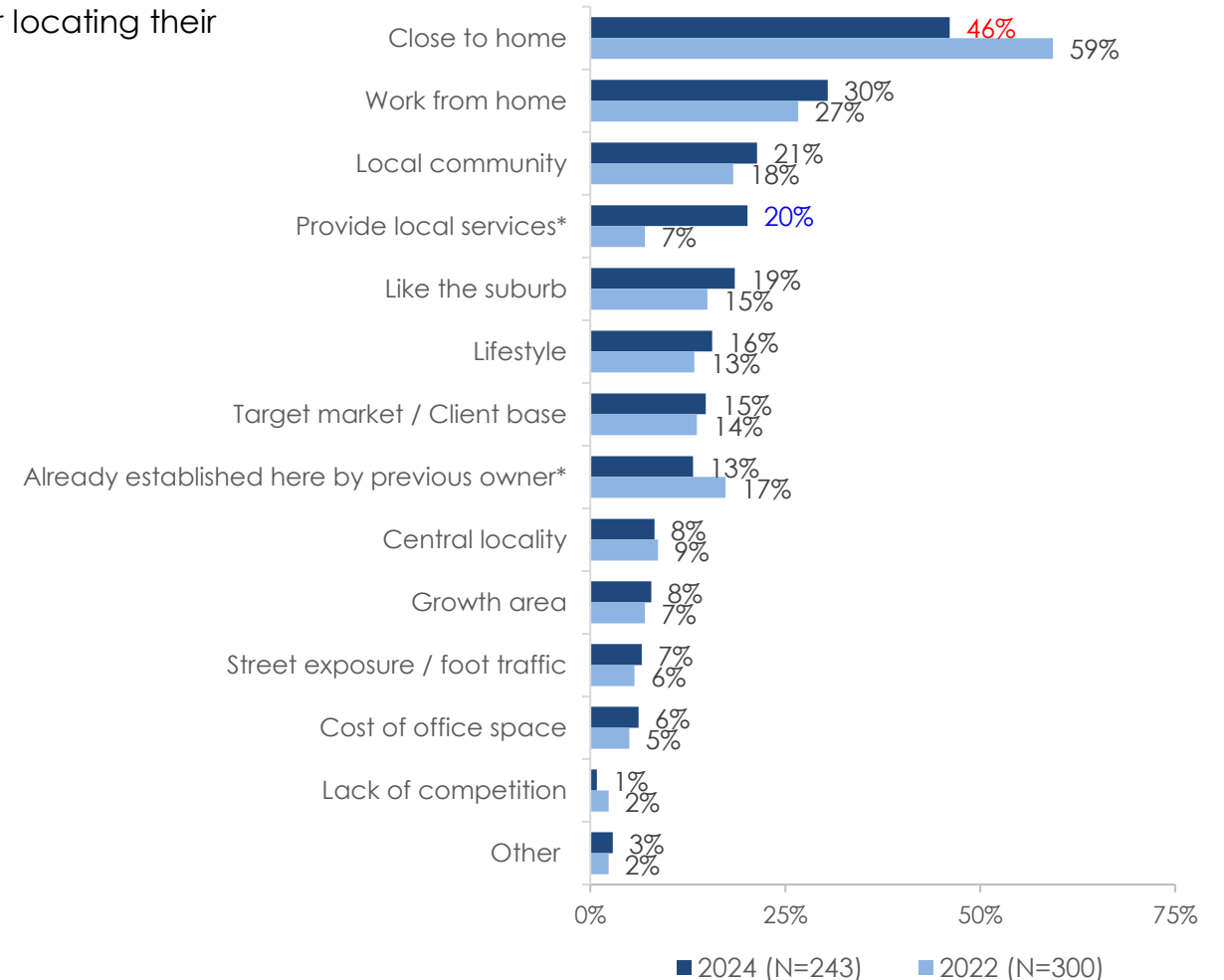
Compared to 2022, representation of commercial premises has increased in 2024, while industrial premises have significantly decreased – consistent with the small differences in industry profiles noted on Slide 12.

Being close to home and the ability to work from home remain top reasons for locating their business within the Sutherland Shire.

Business Premise



Reason for Location



*Slight changes in wording from 2022

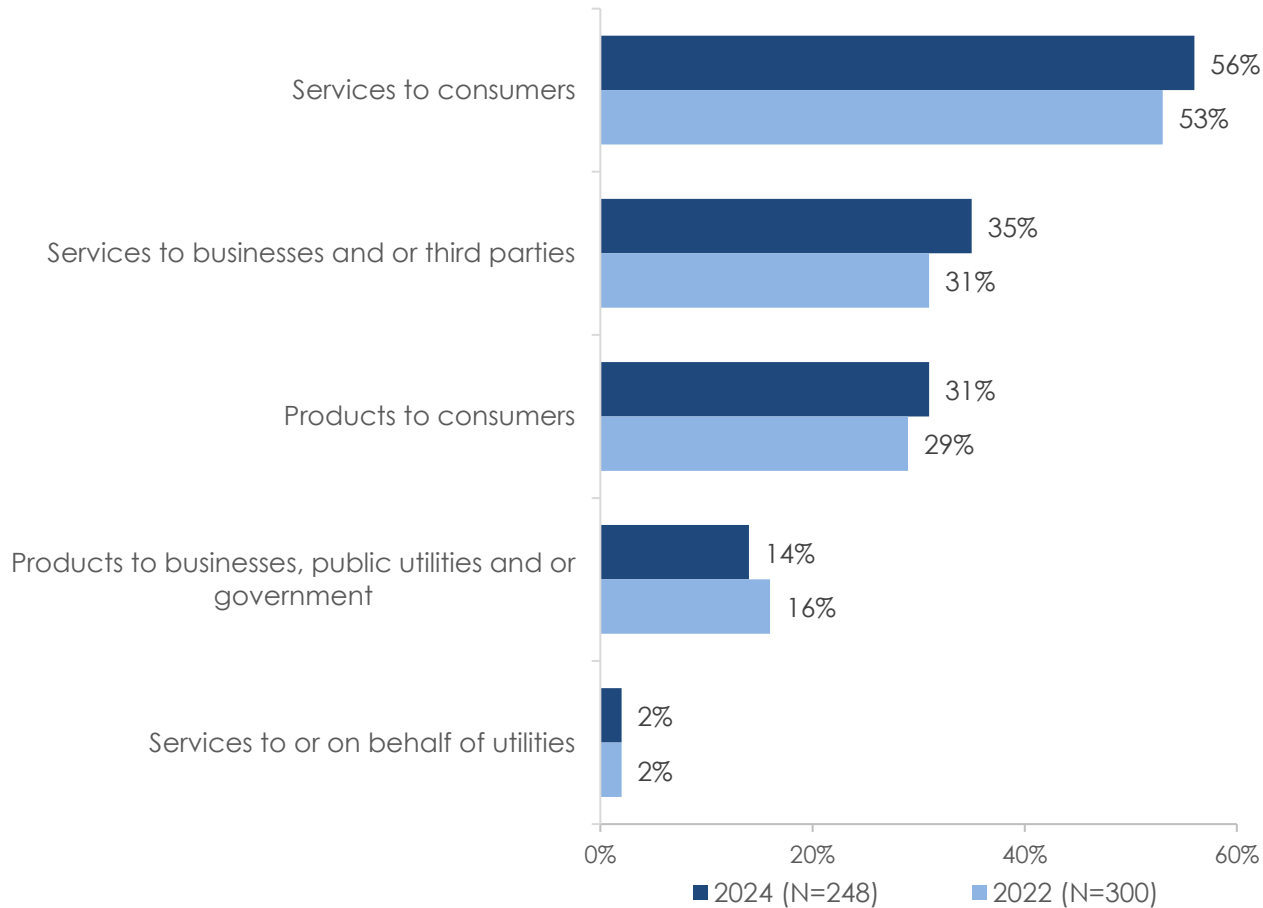
A significantly higher/lower percentage (compared to 2022) 15

Q. What type of premises/space does your business occupy?

Q. What are the reasons for locating your business in the Sutherland Shire?

Business Supply

What does your business supply?



Very much in line with 2022, 56% of responding businesses provide services to consumers and 31% provide products to consumers (see left).

Using these results to create exclusive groups, 57% of businesses deal with consumers only and a further 16% deal with both consumers and businesses (see below), again, these results are in line with 2022 and previous years.

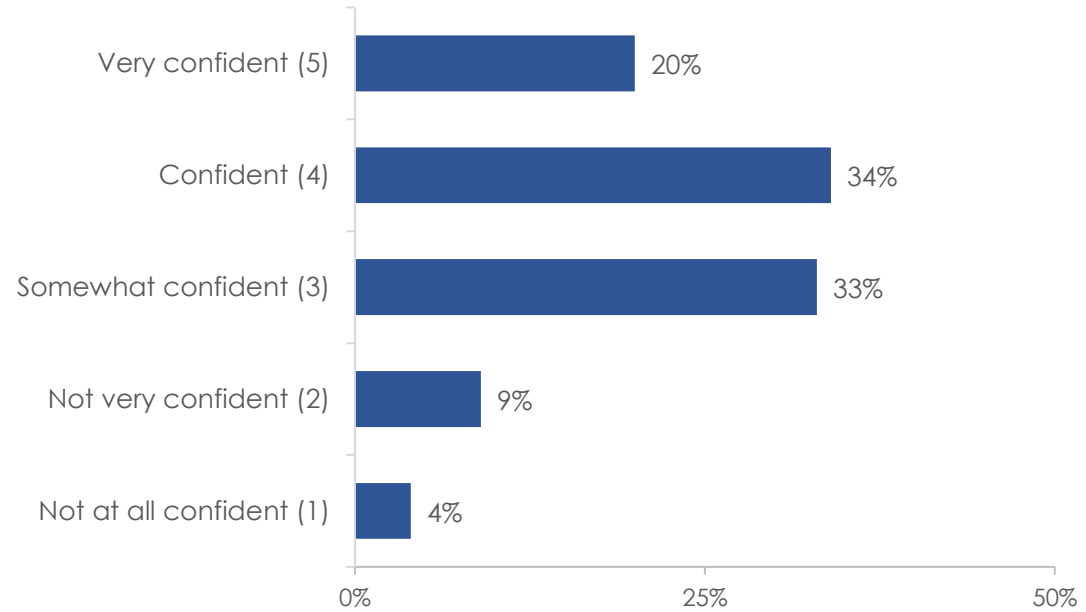
	Deal with consumers only	Deal with businesses only	Deal with both	Don't deal with consumers or businesses
2024 (N=248)	57%	27%	16%	<1%
2022 (N=300)	59%	26%	15%	<1%
2020 (N=404)	55%	30%	15%	0%
2018 (N=660)	57%	25%	18%	<1%

Business Confidence

A new question added this year captures the level of confidence businesses in the Sutherland Shire have in their business prospects over the next 12 months.

Overall, 87% of businesses feel at least somewhat confident about their business prospects, with 1 in 5 feeling 'very confident'.

There is lower confidence amongst business dealing with recreation and visitor services and those within the retail trade industry, which both inherently rely on visitors.



	Overall	Business Sectors (grouped)						
		Professional, scientific & technical services	Retail trade	Health care & social assistance	Construction, manufacturing and mining	Recreation and visitor services	Other white-collar services	Other
Top 3 Box %	87%	90%	78%	86%	92%	71%	97%	90%
Mean rating	3.58	3.73	3.11	3.66	3.71	3.07	3.70	4.03
Base	247	40	37	29	24	28	60	29

Main Challenges of Doing Business in the Sutherland Shire

The first of two 'challenges' questions focussed specifically on the challenges of doing business in the Sutherland Shire.

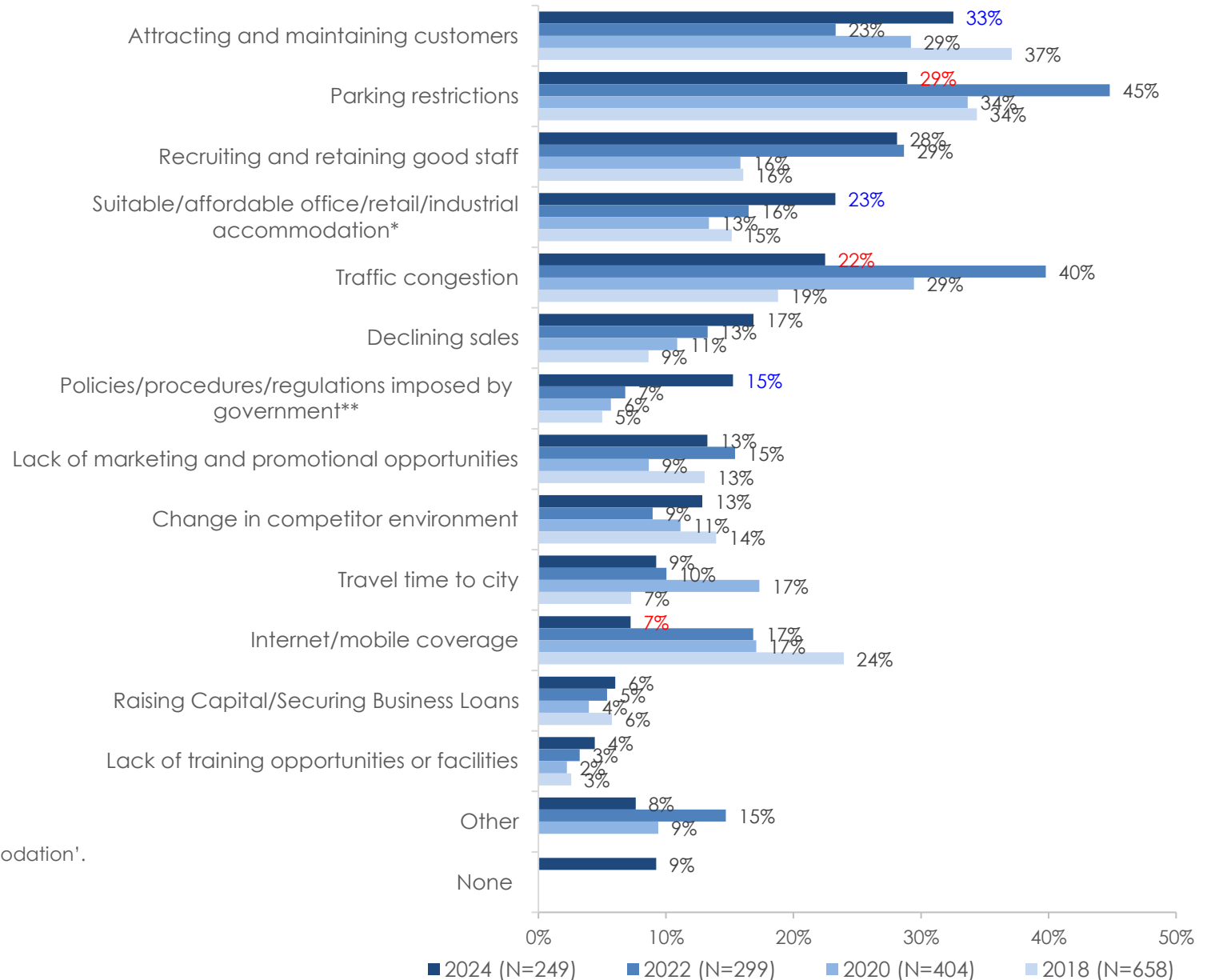
Attracting and maintaining customers remains a main challenge for businesses in the Sutherland Shire.

Positively, challenges relating to parking and traffic congestion – and internet/mobile coverage – have significantly dropped from 2020.

Declining sales continues to be a rising concern, increasing from 9% in 2018 to 17% in 2024.

Policies, procedures and regulations also continues to rise with a significant jump in 2024, possibly impacted by a change in wording adding 'imposed by government'.

Businesses in Retail Trade are significantly more likely to face challenges with traffic congestion (35%) and declining sales (38%).



Wording changes from 2020: *was previously 'suitable/affordable office accommodation'.

**Was previously 'policies and procedures'

'None' added this year

A significantly higher/lower percentage (compared to 2022)

Please see Appendix 1 for results by main business sector

Main Challenges of Doing Business in the Sutherland Shire

This slide now looks at main challenges of doing business in the Shire by the level of business confidence.

The 31 businesses with lower confidence in their business prospects over the next 12 months are significantly more likely to identify 'declining sales' as a main challenge for them doing business in the Sutherland Shire – and whilst not significant (potentially due to the relatively low sample size), they are noticeably more likely to select a number of other factors, such as 'attracting and maintaining customers', 'lack of marketing and promotional opportunities', and 'policies/procedures/regulations imposed by government'. Note that staffing is seemingly not an issue for these low-confidence businesses.

Main Challenges by Business Confidence	Overall	Business confidence for the next 12 months		
		Very confident/ Confident	Somewhat confident	Not at all/ Not very confident
Attracting and maintaining customers	33%	28%	37%	39%
Parking restrictions	29%	27%	32%	32%
Recruiting and retaining good staff	28%	31%	32%	6%
Suitable/affordable office/retail/industrial accommodation	23%	25%	22%	23%
Traffic Congestion	22%	23%	21%	26%
Declining sales	17%	10%	17%	48%
Policies/procedures/regulations imposed by government	15%	14%	13%	23%
Lack of marketing and promotional opportunities	13%	11%	13%	23%
Change in competitor environment	13%	7%	21%	16%
Travel time to city	9%	10%	10%	6%
Internet/mobile coverage	7%	10%	5%	0%
Raising Capital/securing business loans	6%	6%	4%	10%
Lack of training opportunities or facilities	4%	5%	5%	0%
Other	8%	7%	6%	13%
None	9%	11%	9%	3%
Base	249	134	82	31

Significant Business Challenges in the Next 5 Years

Most significant business challenges	2024 (N=247)	2022 (N=300)
Increase in costs/ongoing costs	52%	54%
Change in economy	42%	32%
Retaining/attracting customers/clients	38%	25%
Price of rent	26%	23%
Finding suitable/qualified staff	26%	30%
Suitable parking	21%	25%
Keeping up with competition	19%	18%
Downturn in industry/market demand/decline in sales	19%	19%
Growth/expansion of the business	15%	23%
Funding	13%	7%
Traffic congestion e.g. travel times/customer access	12%	28%
Policies/procedures/regulations imposed by government	11%	N/A
Adapting to technology	6%	7%
Impacts of COVID	4%	11%
Other	6%	7%
Don't know/none	2%	2%

The second 'challenges' question had a broader mix of local (e.g.: parking) and macro (e.g.: economy) attributes.

Increase in costs/ongoing costs is the most significant challenge faced by businesses in the Shire this year, as it was in 2022.

Significantly more businesses in 2024 believe they are likely to face significant challenges in regards to changes in the economy (42% up from 32%), retaining/ attracting customers/clients (38% up from 25%) and funding (13% up from 7%).

Significantly fewer businesses state they are likely to face significant challenges with growth/expansion of the business (15% down from 23%) and traffic congestion (12% down from 28%) – and for the moment, concerns about COVID are almost non-existent.

Significant Business Challenges in the Next 5 Years

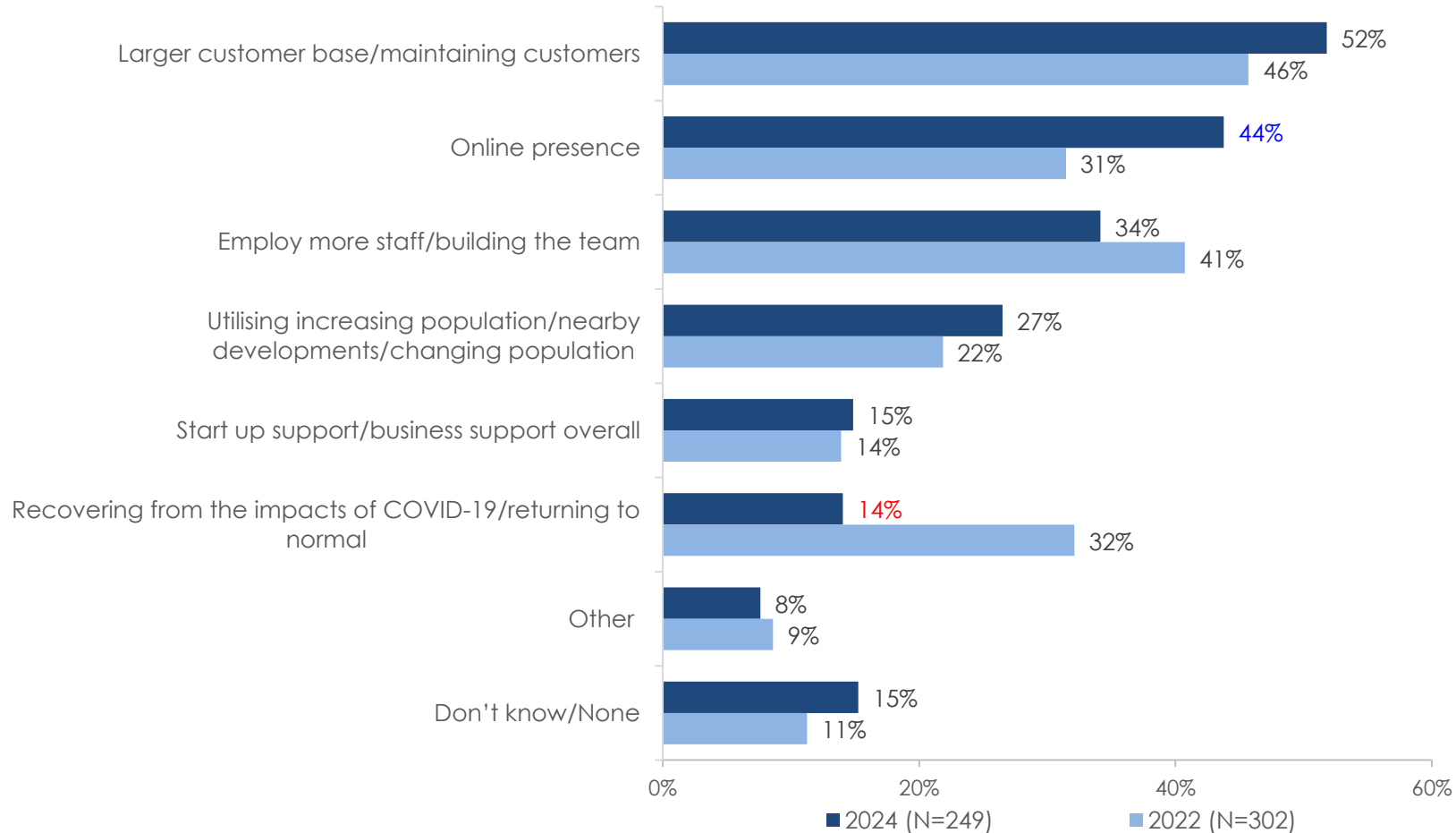
Now looking at the significant challenges in the next five years by the level of business confidence... The 30 businesses with lower confidence in their business prospects are significantly more likely to identify 'rent', 'downturn in industry/sales' and the 'impacts of COVID' as significant challenges for them doing business in the next five years.

Significant Challenges by Business Confidence	Overall	Business confidence for the next 12 months		
		Very confident/ Confident	Somewhat confident	Not at all/ Not very confident
Increase in costs/ongoing costs	52%	51%	57%	40%
Change in economy	42%	38%	48%	43%
Retaining/attracting customers/clients	38%	36%	45%	30%
Price of rent	26%	22%	26%	47%
Finding suitable/qualified staff	26%	29%	26%	7%
Suitable parking	21%	23%	17%	27%
Keeping up with competition	19%	18%	23%	13%
Downturn in industry/market demand/decline in sales	19%	11%	26%	37%
Growth/expansion of the business	15%	19%	13%	7%
Funding	13%	13%	15%	7%
Traffic congestion e.g. travel times/customer access	12%	11%	12%	17%
Policies/procedures/regulations imposed by government	11%	12%	9%	13%
Adapting to technology	6%	6%	7%	0%
Impacts of COVID	4%	2%	6%	13%
Other	6%	6%	5%	13%
None	2%	3%	0%	0%
Base	247	133	82	30

Business Opportunities in the Next 5 Years

Expanding and retaining a customer base continues to be the dominant opportunity for businesses over the next five years – although to some extent this is an ‘outcome’. The main opportunities to help achieve that outcome appear to be:

- Having an online presence, with 44% identifying it as a key opportunity, compared to just 31% in 2022
- Along employing more staff and utilising increasing population.



A significantly higher/lower percentage (compared to 2022)
Please see Appendix 1 for results by main business sector 22

Business Opportunities in the Next 5 Years

The 31 businesses with low business confidence are twice as likely as those with high business confidence to select none of the possible business opportunities (26% v 13%).

On Slide 21 we noted that the businesses with lower confidence were significantly more likely to identify the impacts of COVID as challenges for them doing business in the Sutherland Shire. Encouragingly, we can see here that these businesses also see recovering from the impacts of COVID as a business opportunity for their business in the next five years.

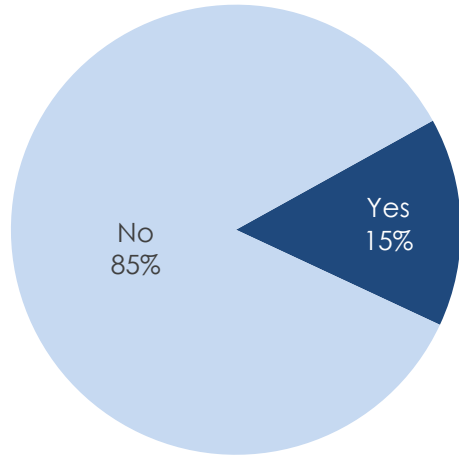
However, they appear less optimistic about customer increase/retention and increasing staff.

Business Opportunities by Business Confidence	Overall	Business confidence for the next 12 months		
		Very confident/ Confident	Somewhat confident	Not at all/ Not very confident
Larger customer base/maintaining customers	52%	57%	54%	23%
Online presence	44%	44%	48%	35%
Employ more staff/building the team	34%	38%	38%	6%
Utilising increasing population/nearby developments/ changing population	27%	26%	33%	13%
Start up support/business support overall	15%	15%	13%	19%
Recovering from the impacts of COVID-19/returning to normal	14%	10%	12%	32%
Other	8%	5%	7%	19%
None	15%	13%	15%	26%
Base	247	134	82	31

Effect of Council's Policies and Procedures

15% of businesses stated they have been adversely affected by Council's policies – significantly lower than 22% in 2022. Issues remain around inconsistent/difficult/timely processes. Note also the emergence of rates/costs as an issue in 2024.

Been adversely affected by Council's policies to develop new business initiatives



	2024	2022	2020	2018
Yes %	15%	22%	11%	17%
Base	246	296	404	648

Reason for being adversely affected	2024 (N=36)	2022 (N=42)
Inconsistent/difficult/timely process	22%	24%
Rates/costs are high	14%	0%
Difficulty dealing with Council	11%	7%
Lack of facilities/poor infrastructure	11%	5%
Limited available parking/lack of enforcement	11%	17%
Access issues e.g. location of bus stops/ footpaths/roadwork/loading docks	8%	2%
Lack of affordable/suitable space to operate	6%	2%
Lack of people/potential customers in the area	6%	0%
Lack of support from Council	6%	7%
Overregulation/red tape	6%	10%
Overdevelopment/overcrowding	3%	5%
Signage policy/restrictions	3%	2%
Traffic congestion/management	3%	7%
Zoning restrictions/rezoning issues	3%	2%
Other	8%	7%

Q. Have any of Sutherland Shire Council's policies (or procedures) adversely affected your decision to develop new business initiatives?
 Q. If yes, please explain.

Suggestions for Council to Better Support Businesses

Significantly more businesses in 2024 would like to see Sutherland Shire Council support businesses through grants, financial assistance and funding – this aligns with 52% of businesses identifying ‘increasing costs’ as a significant concern to them (see Slide 20 – further explored overleaf). Compared to 2022, significantly more businesses would like to see support from Council by working together and promoting industries.

Suggestions	2024 (N=249)	2022 (N=302)
Small business grants/financial assistance/funding	51%	37%
Advertising opportunities	30%	26%
Better road infrastructure	29%	33%
Update infrastructure	28%	25%
Host business networking events/opportunities	27%	23%
Work with Government/Council organisations	26%	18%
Promote industries	25%	12%
Provide business support/courses/information	24%	26%
Other	15%	24%
Don't know	0%	4%
No suggestions/everything appears to be good/none	8%	4%

Suggestions for Council to Better Support Businesses

Unsurprisingly, those likely to experience challenges around increasing costs and funding are more likely to suggest grants/financial assistance from Council to better support their business. Those experiencing market-related issues are more likely to suggest support for networking and business information.

Suggestion for support	Significant challenge									
	Overall	Net: Increasing costs/rent	Net: Market*	Change in economy	Finding suitable/qualified staff	Net: Traffic / parking	Growth/expansion of the business	Funding	Policies/procedures/regulations	Other / don't know
Small business grants/financial assistance/funding	51%	59%	50%	55%	49%	43%	58%	63%	46%	47%
Advertising opportunities	30%	31%	34%	38%	27%	19%	45%	37%	36%	23%
Better road infrastructure	29%	31%	23%	33%	33%	56%	18%	20%	25%	23%
Update infrastructure	28%	27%	22%	23%	29%	48%	34%	30%	32%	23%
Host business networking events/opportunities	27%	27%	34%	30%	33%	14%	45%	27%	29%	21%
Work with Government/Council organisations	26%	26%	27%	24%	30%	22%	39%	40%	32%	21%
Promote industries	25%	25%	26%	31%	29%	17%	32%	30%	39%	21%
Provide business support/courses/information	24%	25%	31%	29%	32%	8%	24%	30%	14%	26%
Other	15%	16%	10%	13%	17%	19%	13%	17%	21%	19%
No suggestions/everything appears to be good/none	8%	5%	11%	4%	3%	2%	3%	3%	11%	14%
Base	249	154	137	103	63	63	38	30	28	43

*(customer retention/sales decline/competition)

Q. Do you have any suggestions or ideas as to how the Sutherland Shire Council can better support your business?

Q. What are the most significant challenges your business is likely to face in the next five years?

Membership to Networks and Associations

Networks/Associations	2024 (N=249)	2022 (N=302)
Professional Industry Association	16%	10%
Sutherland Shire Business Chamber	10%	10%
Realise Business	8%	6%
Cronulla Chamber of Commerce*	5%	N/A*
Business Networking International (BNI)	4%	2%
Shire Biz	3%	4%
Bx Networking	2%	1%
Liquor Accord	2%	2%
Gymea Chamber of Commerce*	2%	N/A*
ShireWoman	1%	2%
Toastmasters	1%	<1%
Bundeena Maianbar Chamber of Commerce*	1%	N/A*
Southern Sydney Innovation Network	1%	N/A
Rotary, Probus or Lions	<1%	<1%
Business Builders Group	<1%	<1%
Southern Strength Manufacturing	<1%	<1%
Club 7	<1%	<1%
Other (please specify)	7%	8%
Not a member of any networks / associations	56%	65%

Membership to networks or associations continues to fluctuate (2016: 44%, 2018: 55%, 2020: 43%, 35% in 2022 to 44% in 2024) with significantly more businesses stating they are a member this year compared to 2022.

Membership of a Professional Industry Association and the Sutherland Shire Business Chamber remains highest.

*Note: 'Chamber of Commerce' was replaced by listing three individual options, in 2024 the total that mentioned these options was 7%, compared to 8% in 2022



Section Two

Jobs

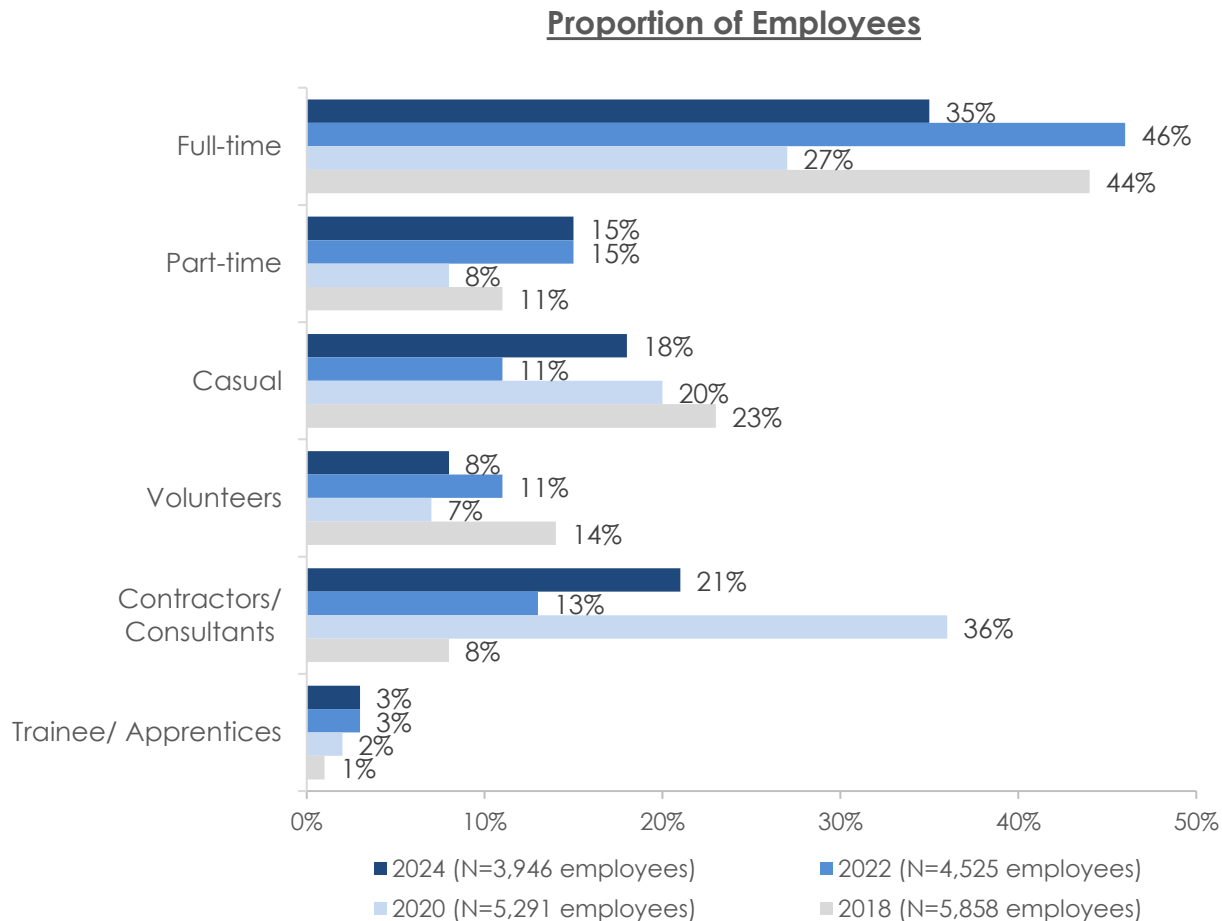
This section looks at current employee share and employment types.

Section note: 7 Businesses did not provide a response for all employee questions and therefore have been excluded from this section – meaning this section is based on N=242 businesses in 2024. 2022 data has also been updated.).

Current Employees – Share of Employee Type

The average number of employees per business continues to increase: in 2018 there were 5,858 employees from 660 businesses = 8.9 per business; and now in 2024 there are 3,946 employees from 242 businesses = 16.3 per business.

Casual employees have increased from 2022, although not significantly – whilst average fulltime employees per business has dropped marginally in 2024.



	Mean number of employees per business			
	2024 (N=242)	2022 (N=297)	2020 (N=404)	2018 (N=660)
Total average number of employees	16.3	15.2	13.1	8.9
Full-time	5.8	7.0	3.6	3.9
Part-time	2.5	2.3	1.0	1.0
Casual	2.9	1.7	2.7	2.0
Volunteer	1.3	1.7	0.9	1.2
Contractors/Consultants	3.5	2.0	4.7	0.7
Trainee/ Apprentice	0.4	0.5	0.2	0.1

Base: Businesses

Note: Business who opted not to answer all employment type questions have been excluded from the analysis. Those who answered some questions and left others blank were allocated a value of '0' for blank responses. 2022 data has been updated to remove the 5 businesses who did not answer at all that year.

Current Employees

The below table looks at total employee numbers by employment category across all years.

From 2022 we can see a slight drop in full-time employment positions and an increase again amongst casual positions and contractors/consultants.

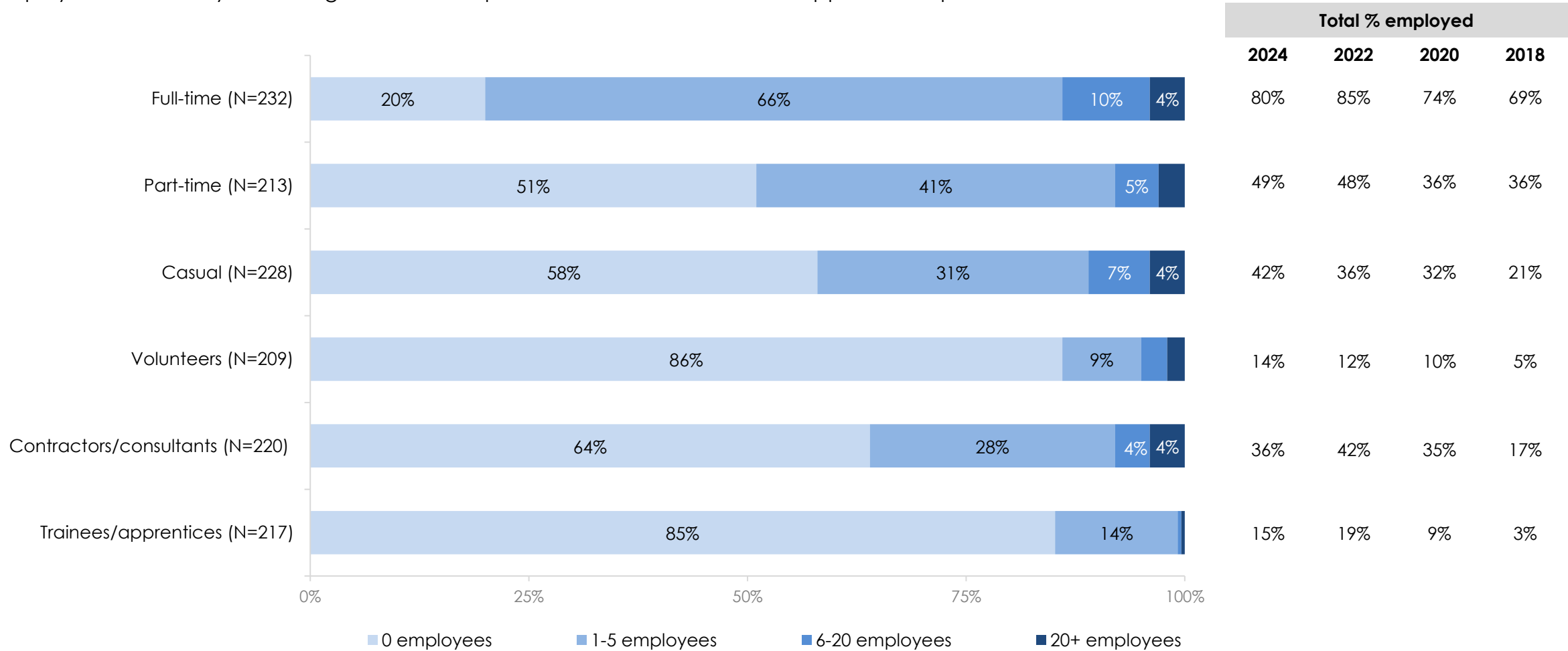
	2024 results			2022 results			2020 results			2018 results		
	Total number of employees (2024)	% of total (2024)	Average employees out of <u>242</u> businesses (2024)	Total number of employees (2022)	% of total (2022)	Average employees out of <u>297</u> businesses (2022)	Total number of employees (2020)	% of total (2020)	Average employees out of <u>404</u> businesses (2020)	Total number of employees (2018)	% of total (2018)	Average employees out of <u>660</u> businesses (2018)
Full-time	1,395	35%	5.8	2,093	46%	7.0	1,435	27%	3.6	2,581	44%	3.9
Part-time	600	15%	2.5	679	15%	2.3	423	8%	1.0	670	11%	1.0
Casual	691	18%	2.9	519	11%	1.7	1,075	20%	2.7	1,332	23%	2.0
Volunteers	307	8%	1.3	498	11%	1.7	379	7%	0.9	795	13%	1.2
Contractors/Consultants	848	21%	3.5	591	13%	2.0	1,898	36%	4.7	441	8%	0.7
Trainee/Apprentices	105	3%	0.4	145	3%	0.5	81	2%	0.2	39	1%	0.1
Total employees	3,946	100%	16.3	4,525	100%	15.2	5,291	100%	13.1	5,858	100%	8.9

Note: Business who opted not to answer all employment type questions have been excluded from the analysis. Those who answered some questions and left others blank were allocated a value of '0' for blank responses. 2022 data has been updated to removed the 5 businesses who did not answer at all.

Current Employees

80% of businesses employ at least one full-time staff member.

Employment is steadily increasing from 2020 for part-time, casual and trainee/apprenticeship roles.



In line with previous reports, respondents that gave a blank answer were allocated a response of '0' employees.

Q. How many (in each employment type)?

Please note: labels for results <4% have not been shown above 31

Current Employees – By Length of Business Operation

The table to the right shows the number of employees for each employment type by length of operation.

As anticipated, the number of employees grows with the length of operation. Businesses that have been in operation for more than 10 years typically employ an average of 23 people.

Current employees by length of operation	Up to 1 year	More than 1 year, up to 3 years	More than 3 years, up to 5 years	More than 5 years, up to 10 years	More than 10 years
Full-time	0.8	0.9	1.9	3.1	9.1
Part-time	0.2	0.7	0.9	4.0	2.9
Casual	0.8	1.0	4.1	3.1	3.1
Volunteers	0.3	0.1	0.7	0.1	2.1
Contractors/Consultants	0.4	0.7	1.1	3.1	5.1
Trainee/Apprentices	0.0	0.0	0.2	0.2	0.7
Total employees	38	84	238	623	2,963
Average number of employees per business	2.4	3.5	8.8	13.5	23.0
Base	16*	24	27	46	129

*Caution low base size

Please note: 'Not yet operational' and 'no longer in operation' have not been included above

Q. How many (in each employment type)?

A significantly higher/lower percentage (by group) 32



Section Three

Turnover

This section explores annual turnover, predicted turnover and estimated turnover derived from online sales and sales within the Shire.

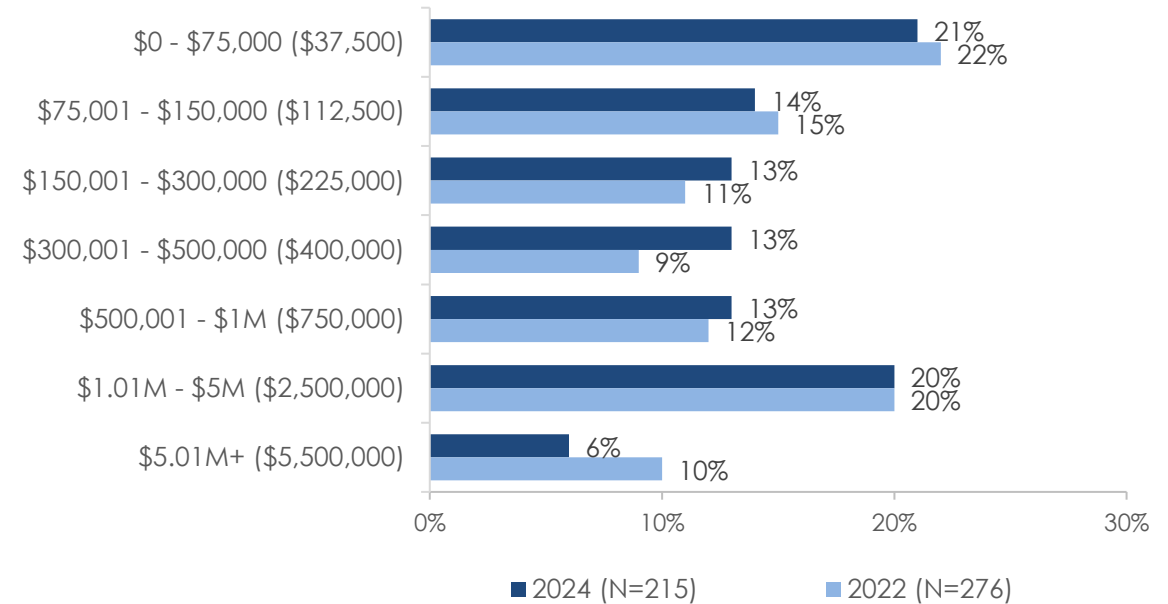
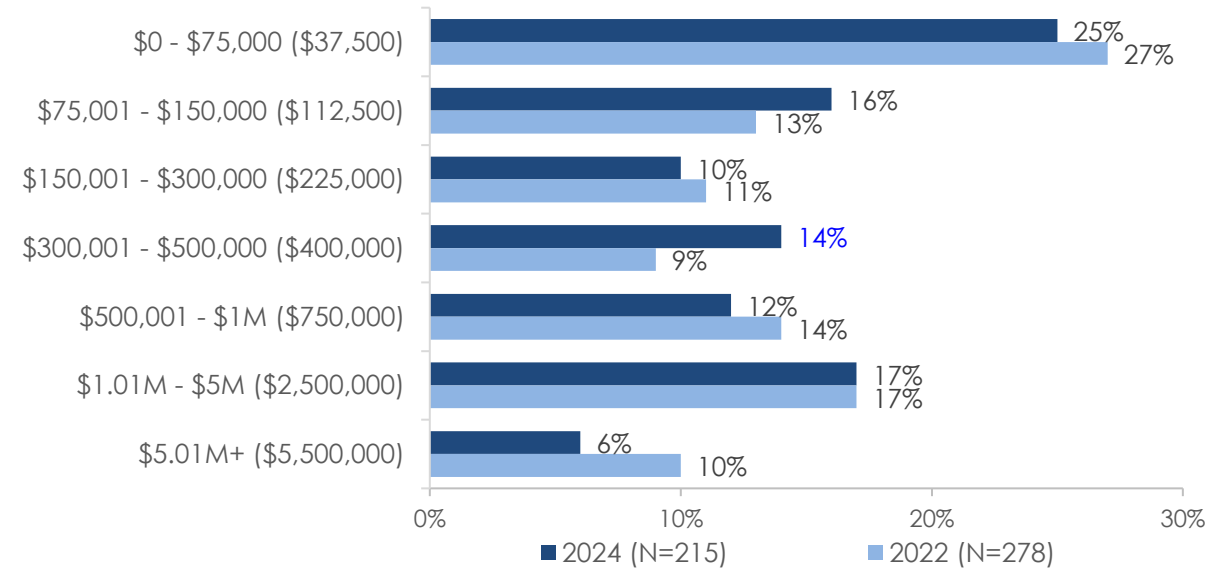
Annual Turnover

The average annual turnover has lessened from 2022 but remains higher than previous years (chart/ table to the left). As expected, businesses that have been in operation for longer than 10 years were significantly more likely to have a higher annual turnover (see table bottom left).

Slightly lower turnover predicted for the 2024/25 financial year, however, for this year's respondents the increase predicted is slightly higher in a relative sense compared to current turnover (see chart/ table below).

(2023/24 FY)	2024	2022	2020	2018	2016
Mean annual turnover	\$934,767	\$1,152,248	\$780,739	\$756,517	\$541,634
Base	215	278	355	539	641

Predicted (2024/25 FY)	2024	2022	2020	2018
Mean annual turnover	\$1,024,826	\$1,239,855	\$811,901	\$791,252
%change predicted	+10%	+8%	+4%	+5%
Base	215	276	355	543



Annual turnover by length of operation	Up to 1 year	More than 1 year, up to 3 years	More than 3 years, up to 5 years	More than 5 years, up to 10 years	More than 10 years
Mean annual turnover	\$278,333	\$195,500	\$386,538	\$774,432	\$1,407,500
Base	15*	25	26	44	105

Please note: 'Not yet operational' and 'no longer in operation' have not been included above

A significantly higher/lower percentage (by year/group) 34

*Caution low base size

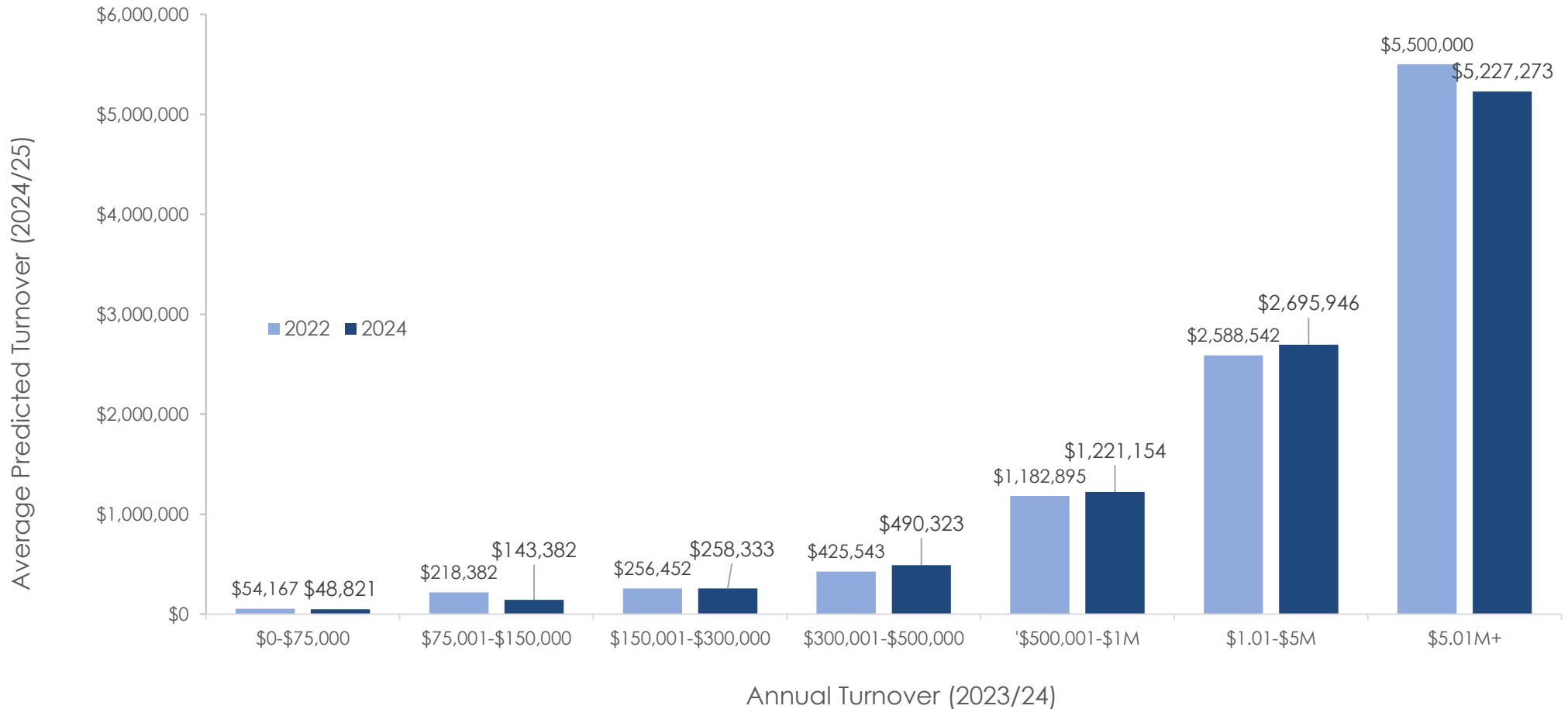
Q. What was the annual turnover of your business in the 2023/24 financial year?

Q. What do you predict your turnover to be in 2024/25?

Annual Turnover – Cross Analysis

The graph below displays the average predicted turnover (vertical axis) by current annual turnover for the 2023/24 financial year. For example, businesses that reported an annual turnover of \$75,001-\$150,000 predict an average turnover of \$143,382 in the 2024/25 financial year. As expected, the larger the current annual turnover, the larger the predicted turnover.

Results are generally similar to those of 2022, with a lower projected turnover for businesses that reported an annual turnover of \$75,001-\$150,000 and \$5.01M+ in the 2023/24 financial year.

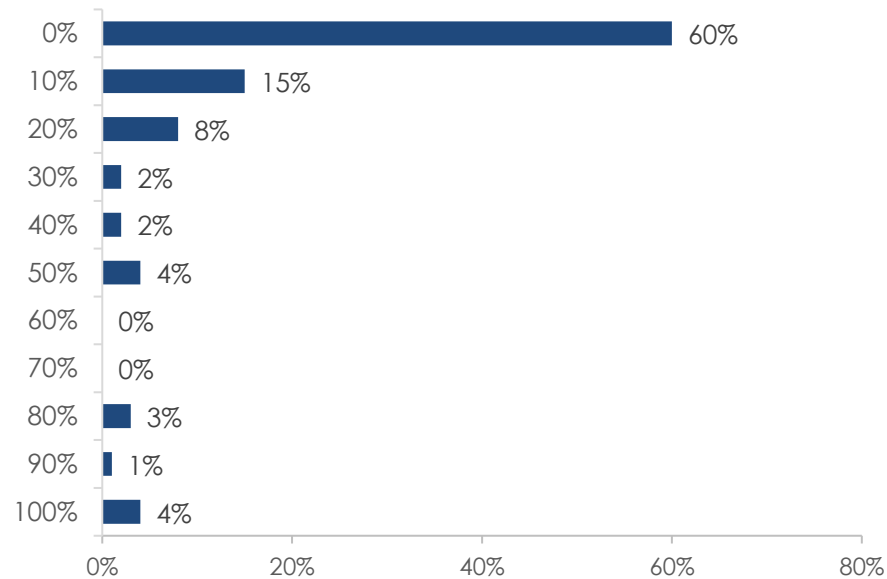


Turnover

Sales (online and within the Shire) remain on par with 2022 sales, with 40% of businesses generating online sales and 82% generating sales within the Sutherland Shire. On average, online sales account for 15% of turnover across all businesses, while sales within Sutherland Shire account for 49% of sales on average.

Online Sales

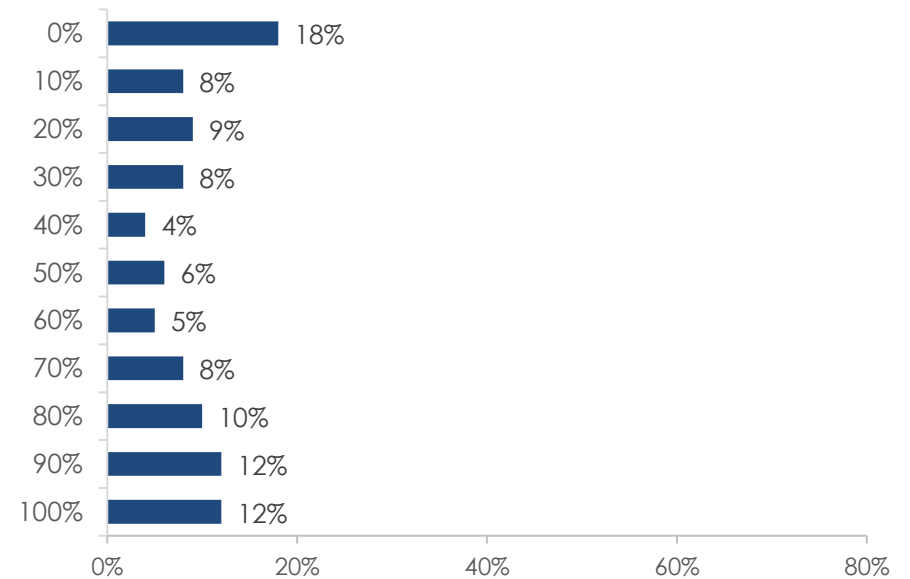
Online sales	2024	2022	2020	2018	2016
Average (based on ALL businesses)	15%	14%	15%	15%	13%
Businesses generating any online sales	40%	37%	33%	35%	42%
Base	249	298	404	660	683



Base: N=249

Sales within Sutherland Shire

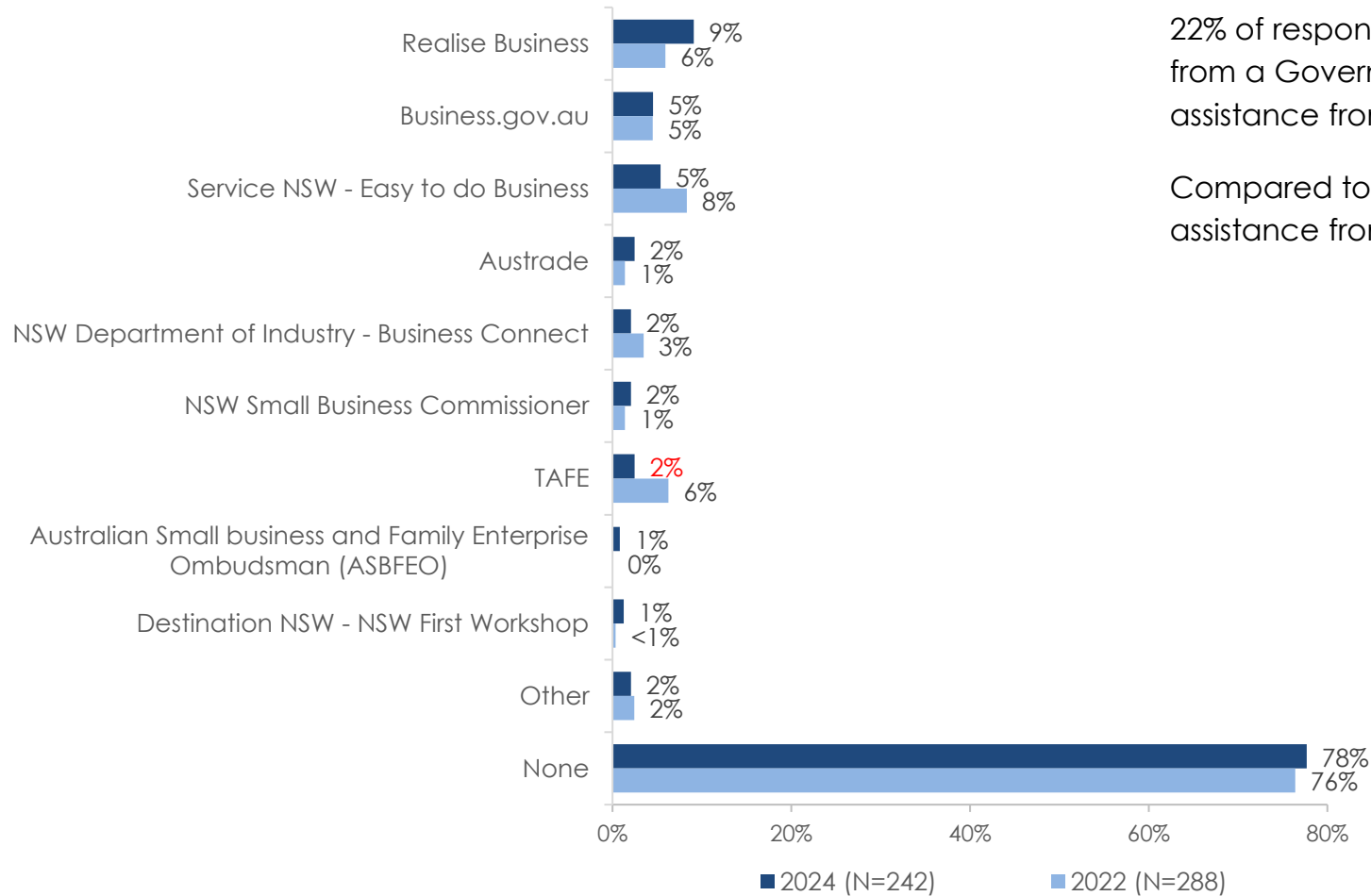
Sales within the Shire	2024	2022	2020	2018	2016
Average (based on ALL businesses)	49%	50%	45%	49%	50%
Businesses generating any local sales	82%	85%	78%	84%	83%
Base	248	299	404	660	710



Base: N=248

- Q. What percentage of your turnover is derived from online sales?
- Q. What percentage of your turnover is derived from sales within the Sutherland Shire?

Assistance from the Government



22% of responding businesses sought some form of assistance from a Government program/resource, with 9% seeking assistance from Realise Business.

Compared to 2022, significantly fewer businesses sought assistance from TAFE.

Note: due to a change in question (the inclusion of 'none'), this question has not been compared to research prior to 2022.

Q. Have you sought assistance from any government programs or resources in the last two years?

A significantly higher/lower percentage (compared to 2022) 37



Section Four

Skills

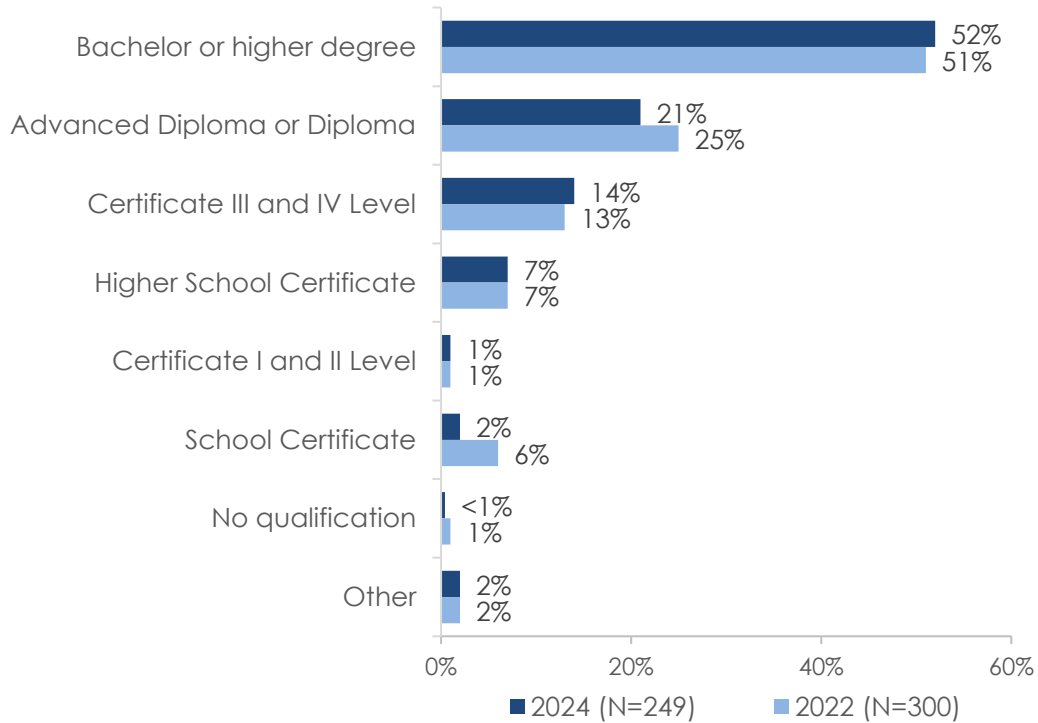
This section explores education levels, plans to continue study and skills shortages amongst businesses within the Shire.

Education and Qualifications

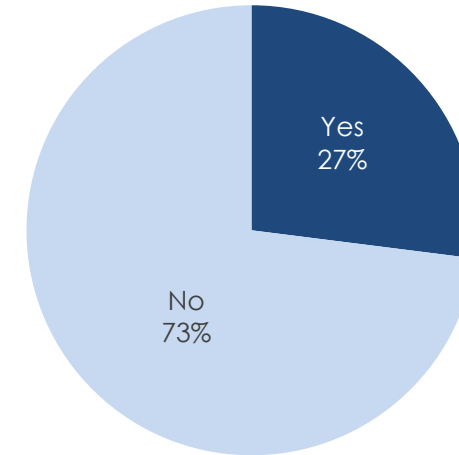
52% of business respondents are bachelor (or higher) qualified. Results are similar to 2022, despite this question changing from a multiple response in 2022 to a single response in 2024 – although only a handful of respondents provided multiple responses in 2022.

27% of respondents plan to begin or continue studies in the next 2 years, which is in line with previous years.

Highest Qualification



Plans to Begin/Continue Study in Next 2 Years



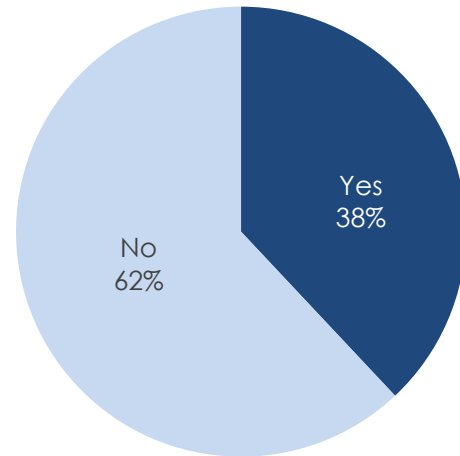
	2024	2022	2020	2018
Yes %	27%	25%	31%	30%
Base	249	298	404	660

Note that the 'Highest Qualification' question changed from a multi to single response in 2024.

- Q. What is your highest qualification?
- Q. Do you have plans to begin or continue study in the next 2 years?

Skill Shortages

38% of businesses have experienced skill shortages, slightly fewer than that recorded in 2022. Construction businesses are more likely to be experiencing shortages (caution, some small sample sizes by industry). See overleaf for specific skillsets.



Base: N=249

	2024	2022	2020	2018	2016	2014
Yes %	38%	42%	26%	28%	24%	23%
Base	249	299	404	660	703	1,186

Skill shortage by business sector	Overall	Business Sectors (grouped)						
		Professional, scientific & technical services	Retail trade	Health care & social assistance	Construction, manufacturing and mining	Recreation and visitor services	Other white-collar services	Other
Yes %	38%	38%	32%	48%	80%	25%	32%	27%
Base	249	40	37	29	25	28	60	30

Skill Shortages

Trades and professional services remain the most sought-after skillsets. 9% of businesses who are experiencing a skill shortage require skilled tradespeople in general and 6% require engineers.

Skill area	2024 (N=94)	2022 (N=126)	Skill area	2024 (N=94)	2022 (N=126)
NET: Trades	26%	32%	NET: Teaching/Education	9%	5%
Skilled tradespeople in general	9%	10%	Qualified trainers	3%	0%
Mechanics	5%	6%	Early education teachers	2%	2%
Brick layers	2%	1%	NET: Retail/Sales	5%	9%
Builders	2%	5%	Salespeople	3%	7%
Carpenters	2%	2%	Florist	2%	1%
Electricians	2%	1%	NET: Hospitality	5%	6%
NET: Professional, Scientific and Technical	22%	19%	Chefs/Cooks	3%	4%
Engineers	6%	5%	NET: Beauty	4%	2%
Digital marketing	2%	0%	Beauty Therapy	3%	0%
Enterprise resource planning (ERP)	2%	0%	NET: Finance	3%	5%
Lawyers	2%	1%	Accountants	3%	2%
Marketing skills	2%	2%	NET: Other	26%	21%
NET: Health/Fitness/Medical	16%	14%	Experienced/qualified staff in general	5%	4%
Health professionals	3%	2%	Administration/customer service staff	2%	6%
Occupational therapist	3%	2%	Inspired people/dedication to job	2%	0%
Allied health practitioners	2%	0%	Senior professionals/supervisory staff	2%	0%
Massage therapists	2%	2%			
Psychologists	2%	2%			



Section Five

Visitor Economy

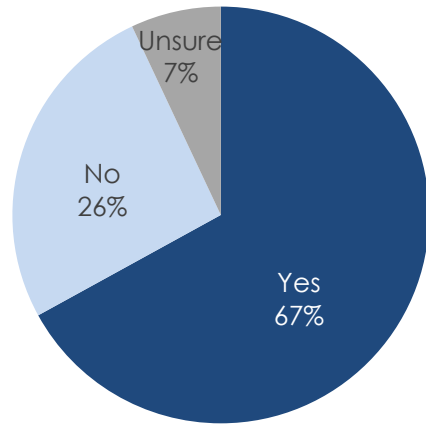
This section looks at businesses catering to and promoting their businesses to visitors from outside the Sutherland Shire.

Note that this year we changed wording from 'tourists' to visitors' on these questions, which has dramatically changed results.

Catering to Visitors from Outside the Sutherland Shire

67% of businesses cater to visitors from outside the Shire. The increase from 26% in 2020 and 2022 to 67% in 2024 is influenced by a change in the wording of the question, replacing 'tourists' with 'visitors,' which broadens the scope of the customer base. However, the 2018 survey also used 'visitors' instead of 'tourists,' and whilst the 2024 results (67%) are certainly more consistent with the 2018 results (78%), there does appear to be an opportunity to have more businesses catering to visitors to the area (as an aside, whilst we had 658 respondents in 2018 and only 249 in 2024, the industry profile of both years is very similar).

Of those that cater to visitors outside the Sutherland Shire, the majority of their visitors come from Sydney (75%).



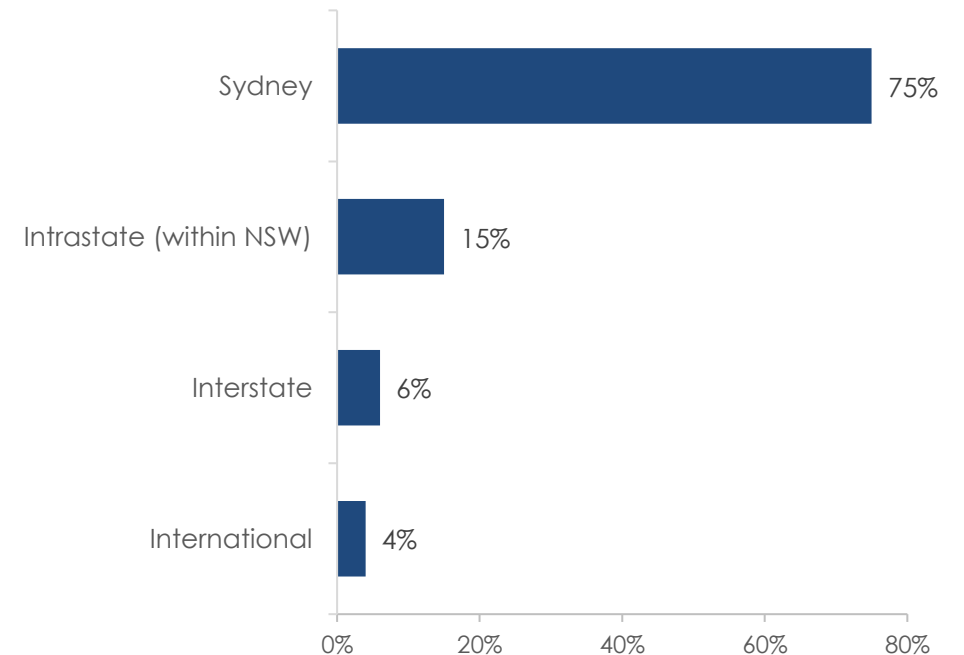
Base: N=247

	2024*	2022	2020	2018*
Yes %	67%	26%	26%	78%
Base	247	297	404	660

*Please note: the wording of the question changed from 'tourists' to 'visitors'

Caters to visitors by business sector	Professional, scientific & technical services	Retail trade	Health care & social assistance	Construction, manufacturing and mining	Recreation and visitor services	Other white-collar services	Other
Yes %	50%	76%	75%	60%	70%	62%	80%
Base	40	37	28	25	27	60	30

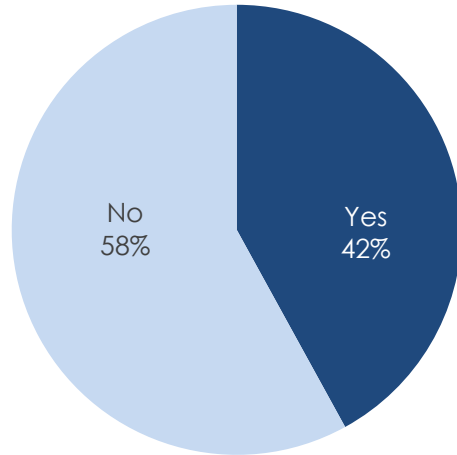
(If yes) Where do visitors come from?



Base: N=164

Promoting the Business Outside the Sutherland Shire

42% of businesses actively promote their services to potential visitors outside the Shire, primarily through their website and social media platforms (Facebook and Instagram).



Base: N=248

	2024	2022	2020	2018
Yes %	42%	11%	17%	66%
Base	248	299	401	657

The increase from 11% in 2022 to 42% in 2024 is influenced by a change in the wording of the question, replacing 'tourists' with 'visitors,' which broadens the scope of the customer base. The 2018 survey also used a broader wording ('Do you actively promote your business outside the Sutherland Shire?'), but it too is not directly comparable with the 2024 question.

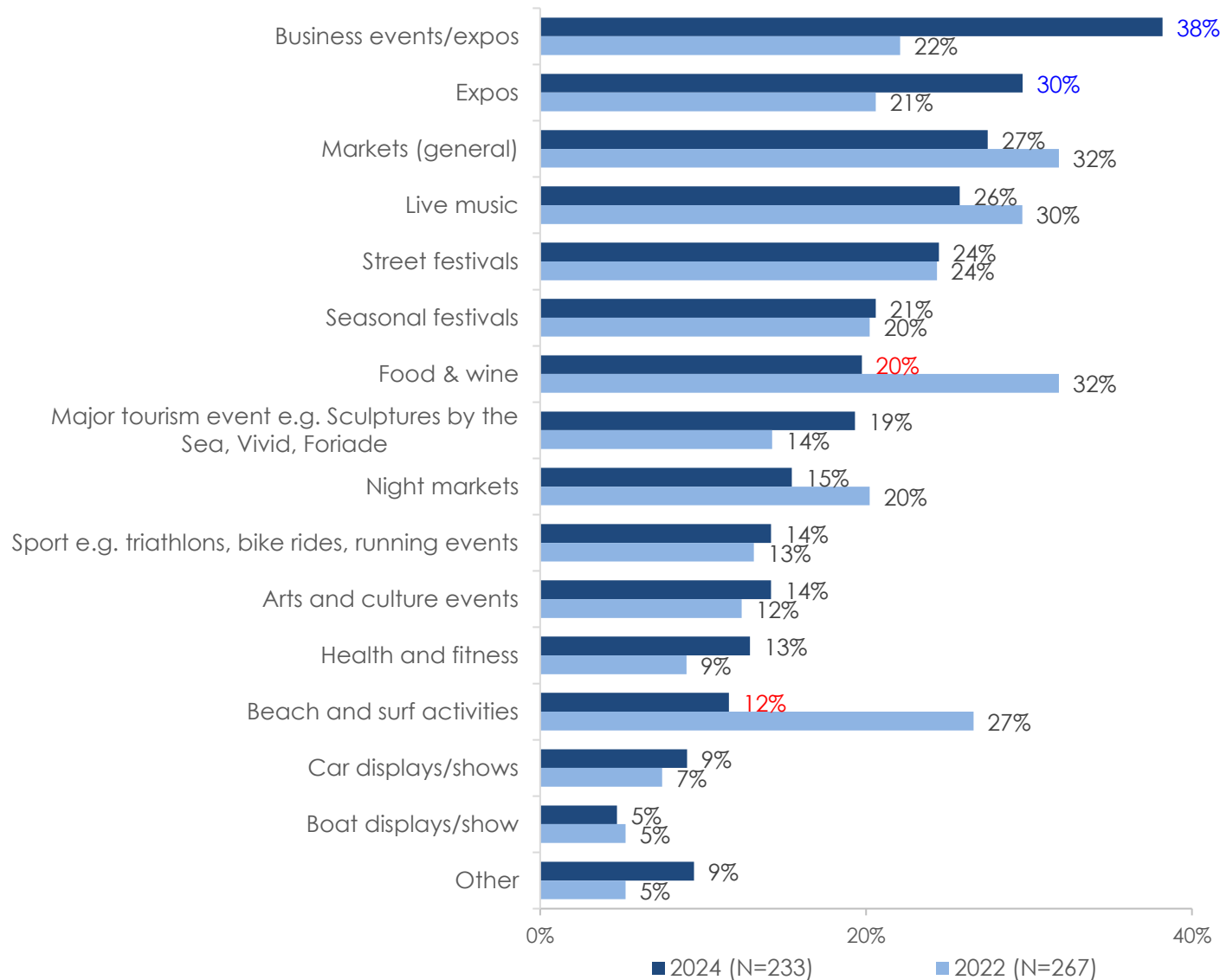
Platforms used to promote:	2024 (N=105)	2022 (N=34)	2020 (N=67)
Net: Social media*	77%	88%	78%
Website	86%	85%	72%
Facebook*	69%	74%	70%
Instagram*	62%	79%	57%
Blog	12%	3%	7%
YouTube*	11%	12%	13%
Events and/or Trade Shows	10%	9%	10%
Sponsorship opportunities	10%	6%	10%
Twitter*	2%	6%	4%
TikTok*	6%	24%	1%
Media programs	6%	3%	9%
Print or Press Advertising	5%	3%	13%
Destination NSW Get Connected Program	2%	3%	4%
TripAdvisor	2%	0%	13%
Best Restaurants	0%	0%	1%
Other	16%	9%	12%

Promotes to visitors by business sector	Professional, scientific & technical services	Retail trade	Health care & social assistance	Construction, manufacturing and mining	Recreation and visitor services	Other white-collar services	Other
Yes %	28%	51%	43%	40%	57%	37%	50%
Base	40	37	28	25	27	60	30

*Please note: the wording of the question changed from 'tourists' to 'visitors'

Q. Do you actively promote your business to potential visitors outside the Sutherland Shire?
 Q. If yes, how do you promote your business to potential visitors from outside the Sutherland Shire?

Place Activation to Increase Visitation



There has been a significant increase in support for business events/expos and expos in general, while support for food & wine and beach/surf activities for place activation has significantly decreased from 2022.

These results suggest that businesses are more interested this year than in 2022 in direct B2B activations rather than in consumer activations designed to indirectly support businesses – which may reflect in part the small increase in white-collar businesses (i.e.: Professional/scientific/technical services, Administration and support services, Education and training, and Personal services) noted on Slide 12.

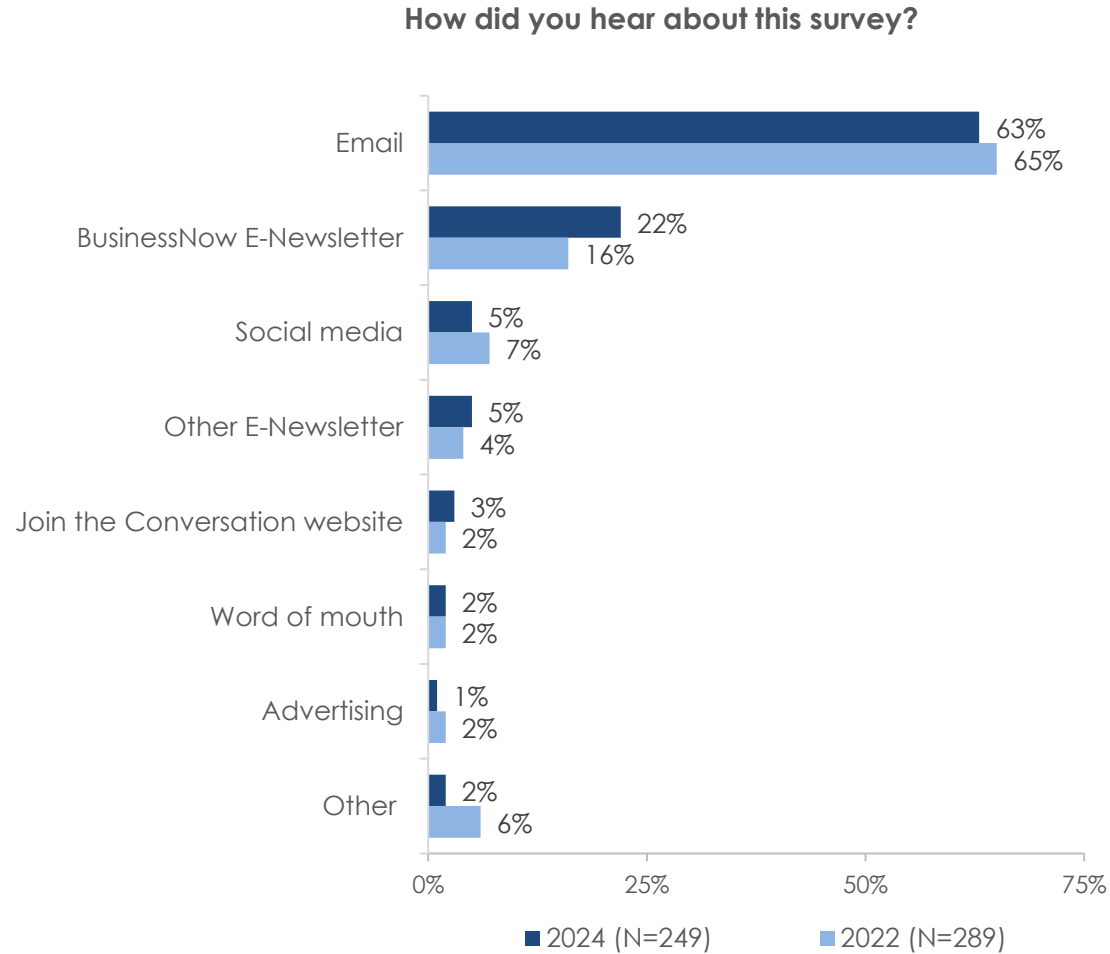


Additional Analyses

Appendix 1

Hearing about the Survey

Email remains the most common way of hearing about this survey. An increase in awareness through the BusinessNow E-Newsletter (22% up from 16%).



Main Challenges of Doing Business in the Sutherland Shire

Main challenges by business sector	Overall	Business Sectors (grouped)						
		Professional, scientific & technical services	Retail trade	Health care & social assistance	Construction, manufacturing and mining	Recreation and visitor services	Other white-collar services	Other
Attracting and maintaining customers	33%	15%	46%	34%	20%	54%	28%	37%
Parking restrictions	29%	15%	35%	34%	24%	25%	38%	23%
Recruiting and retaining good staff	28%	25%	30%	41%	48%	25%	18%	23%
Suitable/affordable office/retail/industrial accommodation	23%	18%	27%	38%	28%	11%	25%	17%
Traffic Congestion	22%	20%	35%	21%	24%	14%	18%	27%
Declining sales	17%	5%	38%	14%	12%	32%	5%	23%
Policies/procedures/regulations imposed by government	15%	13%	8%	24%	16%	14%	18%	13%
Lack of marketing and promotional opportunities	13%	8%	19%	14%	12%	25%	8%	13%
Change in competitor environment	13%	10%	16%	21%	12%	11%	12%	10%
Travel time to city	9%	28%	0%	3%	8%	7%	8%	7%
Internet/ mobile coverage	7%	8%	5%	7%	12%	4%	10%	3%
Raising Capital/Securing Business Loans	6%	3%	3%	0%	16%	11%	7%	7%
Lack of training opportunities or facilities	4%	5%	0%	10%	12%	0%	5%	0%
Other	8%	10%	14%	3%	4%	4%	8%	7%
None	9%	15%	8%	3%	8%	4%	15%	3%
Base	249	40	37	29	25	28	60	30

Significant Business Challenges in the Next 5 Years

Significant challenges by business sector	Overall	Business Sectors (grouped)						
		Professional, scientific & technical services	Retail trade	Health care & social assistance	Construction, manufacturing and mining	Recreation and visitor services	Other white-collar services	Other
Increase in costs/ongoing costs	52%	36%	59%	41%	75%	54%	48%	60%
Change in economy	42%	36%	57%	31%	42%	36%	42%	50%
Retaining/attracting customers/clients	38%	56%	32%	28%	21%	54%	38%	30%
Price of rent	26%	8%	41%	41%	25%	32%	20%	27%
Finding suitable/qualified staff	26%	21%	19%	24%	50%	21%	23%	33%
Suitable parking	21%	10%	38%	24%	13%	21%	20%	20%
Keeping up with competition	19%	28%	8%	34%	21%	7%	17%	20%
Downturn in industry/market demand/decline in sales	19%	21%	30%	14%	25%	11%	15%	20%
Growth/expansion of the business	15%	21%	5%	14%	21%	21%	15%	13%
Funding	13%	5%	8%	14%	17%	11%	13%	23%
Traffic congestion e.g. travel times/customer access	12%	5%	27%	10%	13%	11%	12%	7%
Policies/procedures/regulations imposed by government	11%	13%	8%	17%	8%	7%	12%	10%
Adapting to technology	6%	15%	0%	3%	0%	4%	10%	0%
Impacts of COVID	4%	3%	5%	10%	0%	7%	5%	0%
Other	6%	8%	11%	3%	4%	4%	8%	3%
None/don't know	2%	3%	0%	0%	0%	0%	5%	0%
Base	247	39	37	29	24	28	60	30

Business Opportunities in the Next 5 Years

Business opportunities by business sector	Overall	Business Sectors (grouped)						
		Professional, scientific & technical services	Retail trade	Health care & social assistance	Construction, manufacturing and mining	Recreation and visitor services	Other white-collar services	Other
Larger customer base/maintaining customers	52%	63%	54%	45%	48%	46%	50%	53%
Online presence	44%	43%	54%	34%	44%	39%	48%	37%
Employ more staff/building the team	34%	38%	27%	48%	40%	18%	37%	30%
Utilising increasing population/nearby developments/changing population	27%	23%	41%	41%	28%	25%	12%	30%
Start up support/business support overall	15%	13%	3%	17%	12%	14%	20%	23%
Recovering from the impacts of COVID-19/returning to normal	14%	18%	14%	7%	20%	18%	12%	13%
Other	8%	3%	8%	10%	12%	11%	5%	10%
None/don't know	15%	10%	16%	14%	8%	18%	22%	13%
Base	249	40	37	29	25	28	60	30

Skill Shortages

Skill area	2024 (N=94)	2022 (N=126)
NET: Trades	26%	32%
Brick layers	2%	1%
Builders	2%	5%
Building certifier	1%	0%
Cabinetmakers	0%	1%
Carpenters	2%	2%
Concreters	1%	0%
Electricians	2%	1%
Fencing	1%	0%
Fire Engineer	1%	0%
Glaziers	1%	1%
Horticulture/landscaping	0%	2%
Installation staff	1%	2%
Labourers	1%	2%
Metal workers	1%	0%
Mechanics	5%	6%
Plumbers	1%	1%
Restorers	1%	0%
Roofers	1%	0%
Overhead workers	1%	0%
Skilled tradespeople in general	9%	10%
Stonemasonry	0%	1%
Tilers	1%	0%
Trackwork	1%	0%
Upholsterers	1%	0%

Skill area	2024 (N=94)	2022 (N=126)
NET: Professional, Scientific and Technical	22%	19%
Analytical sciences	1%	0%
Architects	0%	1%
Audiovisual technician	1%	0%
Building Inspectors	0%	1%
Consultants	1%	1%
Conveyancer	0%	2%
Digital marketing	2%	0%
Duty planner (Town-planning specialty)	1%	0%
Engineers	6%	5%
Enterprise resource planning (ERP)	2%	0%
Estimators	1%	0%
Horticulturalist	1%	0%
IT e.g. security, software scripting	0%	4%
Lawyers	2%	1%
Locksmiths	1%	0%
Marketing skills	2%	2%
Online business manager	1%	0%
Plant operator	1%	0%
Programmers/software engineers	0%	2%
Project managers	1%	0%
Town planners	0%	1%
Technician	0%	1%

Skill Shortages

Skill area	2024 (N=94)	2022 (N=126)
NET: Teaching/Education	9%	5%
Dental training	1%	0%
Early education teachers	2%	2%
Music teachers	0%	2%
Performance art teachers	0%	1%
Swimming teachers	1%	0%
Teachers in general	1%	0%
Qualified trainers	3%	0%
NET: Hospitality	5%	6%
Bakers	1%	0%
Barista	0%	1%
Chefs/Cooks	3%	4%
Front of house staff	0%	1%
Hospitality staff in general	1%	2%
Qualified kitchen workers	1%	0%
NET: Retail/Sales	5%	9%
Butchers	0%	1%
Florist	2%	1%
Jewellers	0%	1%
Salespeople	3%	7%
Small goods makers	0%	1%
Museum operator	1%	0%
NET: Beauty	4%	2%
Beauty Therapy	3%	0%
Cosmetic formulators/compounding technicians	1%	0%
Hairdressers	0%	2%
NET: Finance	3%	5%
Accountants	3%	2%
Bookkeeping	0%	1%
Financial planners	0%	1%
Paraplanning	0%	1%

Skill area	2024 (N=94)	2022 (N=126)
NET: Other	26%	21%
Administration/customer service staff	2%	6%
Aged care	0%	1%
Aluminium	0%	0%
Apprentices/trainees	0%	3%
Aquaculture technician	1%	0%
AUSLAN speakers	1%	0%
Casual staff	1%	0%
Cleaning services/housekeepers	1%	1%
Drivers e.g. truck, commercial	1%	2%
English speakers/overseas applicants	1%	1%
Experienced/qualified staff in general	5%	4%
Factory workers	1%	0%
Gemologist	0%	1%
Inspired people/dedication to job	2%	0%
Marine trade/yacht rigging	0%	2%
Optical dispensers	1%	0%
Pest management	1%	0%
Planning officer	1%	0%
Senior professionals/supervisory staff	2%	0%
Sewers	0%	1%
Support workers	0%	2%
Tailors	1%	0%
Toolmaking	0%	1%
Travel agent	1%	0%
Writers	1%	0%

Q. Have you experienced skill shortages in your business or business dealings?
 Q. If yes, please specify which skills.



Questionnaire

Appendix 2

Business Survey 2024

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Sutherland Shire Business Survey 2024

This survey takes 5-10 minutes to complete.

Submit your name and contact details at the end to go in the draw to **WIN** one of three Visa gift vouchers. Your survey answers will remain confidential in line with our [Privacy Statement](#).

We appreciate your participation.

SECTION 1: DOING BUSINESS IN THE SUTHERLAND SHIRE

From which suburb in Sutherland Shire do you **PRIMARILY** operate your business?

(Required)

Note: Start typing your suburb name then choose from the drop-down options. Please note this survey is open to businesses operating in the Sutherland Shire Local Government Area only

Do you also live in the Sutherland Shire?

(Choose any one option)

- Yes
 No

Which one main business sector do you operate in?

(Choose any one option) (Required)

- Accommodation & food services
 Administration & support services
 Agriculture, forestry & fishing
 Arts & recreation services
 Construction
 Education & training
 Electricity, gas, water & waste services
 Financial & insurance services
 Health care & social assistance
 Household services
 Information, media & telecommunications
 Manufacturing
 Mining
 Personal services
 Professional, scientific & technical services
 Public administration & safety
 Rental, hiring & real estate services
 Retail trade
 Transport, postal & warehousing

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- Tourism
 Wholesale trade
 Other (please specify)

What is the structure of your business?

(Choose any one option)

- Federal owned corporation
 Not-for-profit
 Partnership
 Publicly listed company
 Privately owned company
 Sole trader
 Subsidiary of an overseas company
 State owned corporation
 Trust
 Other (please specify)

What type of premises / space does your business occupy?

(Choose any one option)

- Commercial (eg. retail / office space etc)
 Co-working
 Educational
 Health
 Home
 Industrial
 Market / Pop-up
 Mobile
 Other (please specify)
 Hired Hall
 Outdoor Field/Oval

What does your business supply?

(Choose all that apply)

- Products to consumers
 Products to businesses, public utilities and or government
 Services to consumers
 Services to businesses and/or third parties
 Services to or on behalf of utilities eg Telstra, energy suppliers or government.

How long has your business been in operation?

(Choose any one option)

- Not yet operational
 Up to 1 year
 More than 1 year up to 3 years
 More than 3 years up to 5 years
 More than 5 years up to 10 years

Business Survey 2024

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- More than 10 years up to 15 years
 More than 15 years up to 20 years
 More than 20 years
 No longer in operation

What are the reasons for locating your business in the Sutherland Shire?

(Choose all that apply)

- Close to home
 Growth area
 Lifestyle
 Already established here by previous owner
 Central locality
 Target market / Client base
 Cost of office space
 Lack of competition
 Local community
 Like the suburb
 Provide local services
 Street exposure / foot traffic
 Work from home
 Provide goods/services to the local community
 Other (please specify)

Thinking about the next 12 months, how confident, do you feel about your business prospects?

(Choose any one option)

- Very confident
 Confident
 Somewhat confident
 Not very confident
 Not at all confident

What are the most significant challenges your business is likely to face in the next 5 years? (choose up to 4)

(Choose any 4 options) (Required)

- Keeping up with competition
 Retaining/attracting customers/clients
 Downturn in industry/market demand/decline in sales
 Change in economy
 Impacts of COVID
 Price of rent
 Increase in costs/ongoing costs
 Suitable parking
 Traffic congestion e.g. travel times/customer access
 Finding suitable/qualified staff
 Adapting to technology
 Growth/expansion of the business
 Funding
 Policies/incentives/regulations imposed by government

Business Survey 2024

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- I don't know
 Don't know
 None
 Other (please specify)

What are the main challenges of doing business in the Sutherland Shire? (choose up to 4)

(Choose any 4 options) (Required)

- Attracting and maintaining customers
 Change in competitor environment
 Declining sales
 Internet/ mobile coverage
 Lack of marketing and promotional opportunities
 Policies/procedures/regulations imposed by government
 Parking restrictions
 Recruiting and retaining good staff
 Suitable/affordable office/retail/industrial accommodation
 Lack of training opportunities or facilities
 Raising capital/Securing business loans
 Traffic congestion
 Travel time to city
 None
 Other (please specify)

What do you believe are the main opportunities for your business in the next five years? (choose up to 4)

(Choose any 4 options) (Required)

- Recovering from the impacts of COVID-19/returning to normal
 Larger customer base/maintaining customers
 Online presence
 Employ more staff/building the team
 Utilising increasing population/nearby developments/changing population
 Start up support/business support overall
 Don't know
 None
 Other (please specify)

Have any of Sutherland Shire Council's policies (or procedures) adversely affected your decision to develop new business initiatives?

(Choose any one option)

- Yes
 No

Answer this question only if you have chosen Yes for Have any of Sutherland Shire Council's policies (or procedures) adversely affected your decision to develop new business initiatives?

You selected 'Yes', please explain your answer briefly

(Required)

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Do you have any suggestions or ideas as to how the Sutherland Shire Council can better support your business? (choose up to 4)

(Choose any 4 options)

- Update infrastructure
 Better road infrastructure
 Advertising opportunities
 Promote industries
 Host business networking events/opportunities
 Small business grants/financial assistance/funding
 Provide business support/courses/information
 Work with Government/Council organisations
 None
 Other (please specify)

SECTION 2: JOBS

The next questions are about the numbers of employees in your business.

How many full-time staff, if any, are employed in your business?

How many part-time staff, if any, are employed in your business?

How many casual staff, if any, are employed in your business?

How many volunteers, if any, are employed in your business?

How many contractor/consultants, if any, are employed in your business?

Business Survey 2024

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How many trainee/apprentices, if any, are employed in your business?

SECTION 3: TURNOVER

What was the annual turnover of your business in the 2023/24 financial year?

(Choose any one option)

- \$0-\$75,000
 \$75,001-\$150,000
 \$150,001-\$300,000
 \$300,001-\$500,000
 \$500,001-\$1M
 \$1.01-\$5M
 \$5.01M+
 Unsure/unknown
 Prefer not to answer

What do you predict your turnover to be in 2024/25?

(Choose any one option)

- \$0-\$75,000
 \$75,001-\$150,000
 \$150,001-\$300,000
 \$300,001-\$500,000
 \$500,001-\$1M
 \$1.01-\$5M
 \$5.01M+
 Unsure/unknown
 Prefer not to answer

Approximately what percentage of your turnover is derived from online sales?

(Choose any 1 options)

- 0%
 10%
 20%
 30%
 40%
 50%
 60%
 70%
 80%
 90%

Business Survey 2024

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100%

Approximately what percentage of your turnover is derived from sales WITHIN Sutherland Shire?

(Choose any 1 options)

- 0%
- 10%
- 20%
- 30%
- 40%
- 50%
- 60%
- 70%
- 80%
- 90%
- 100%

Is your business a member of any of the following networks / associations?

(Choose all that apply)

- Business Builders Group
- Business Networking International (BNI)
- Bx Networking
- Cronulla Chamber of Commerce
- Club 7
- Flying Solo
- Bundeena Malabar Chamber of Commerce
- Professional Industry Association
- Liquor Accord
- Rotary, Probus or Lions
- Gynea Chamber of Commerce
- Realise Business
- Shire Biz
- ShireWomen
- Southern Strength Manufacturing
- Sutherland Shire Business Chamber
- Southern Sydney Innovation Network
- Toastmasters
- Not a member of any networks / associations
- Other (please specify)

Have you sought assistance from any government programs or resources in the last two years? (please tick all that apply)

(Choose all that apply)

- Austrade
- Destination NSW - NSW First Workshop
- NSW Department of Industry - Business Connect
- Realise Business
- Service NSW - Easy to do Business
- Business.gov.au

Business Survey 2024

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NSW Small Business Commissioner

NSW Small Business Commissioner

TAFE

Other (please specify)

Australian Small business and Family Enterprise Ombudsman (ASBFEO)

None

SECTION 4: SKILLS

What is your highest qualification? (Select one answer only)

(Choose any one option)

- Bachelor or higher degree
- Advanced Diploma or Diploma
- Certificate III and IV Level
- Certificate I and II Level
- Higher School Certificate
- School Certificate
- No qualification
- Other (please specify)

Do you have plans to begin or continue study in the next 2 years?

(Choose any one option)

- Yes
- No

Have you experienced skill shortages in your business or business dealings? (Not enough qualified engineers, building trades, mechanics, health professionals etc)

(Choose any one option)

- Yes
- No

Answer this question only if you have chosen Yes for Have you experienced skill shortages in your business or business dealings? (Not enough qualified engineers, building trades, mechanics, health professionals etc)

If yes, please specify which skills

SECTION 5: VISITOR ECONOMY

Does your business cater to visitors from outside the Sutherland Shire?

(Choose any one option)

- Yes
- No

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NSW

Unsure

If yes, where do the majority of your visitors come from?

(Choose any one option)

- Sydney
- Intrastate (within NSW)
- Interstate
- International

Do you actively promote to potential visitors from outside the Sutherland Shire?

(Choose any one option)

- Yes
- No

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Answer this question only if you have chosen Yes for Do you actively promote to potential visitors from outside the Sutherland Shire?

If yes, how do you promote your business to potential visitors from outside the Sutherland Shire? (Tick all that apply)

(Choose all that apply)

- Website
- YouTube
- TripAdvisor
- Facebook
- Events and/or Trade Shows
- Instagram
- Destination NSW Get Connected Program
- Best Restaurants
- Media programs
- Print or Press Advertising
- Sponsorship opportunities
- Blog
- TikTok
- Twitter
- Other (please specify)

Council facilitates the activation of public spaces to attract more customers to local business. Which of these activities do you think would best support local business and increase visitation? (Select up to four options)

(Choose any 4 options)

- Beach and surf activities
- Boat displays/ show
- Car displays/ shows
- Expos
- Food & wine
- Live music
- Markets (general)
- Night markets
- Seasonal festivals
- Street festivals
- Sport - triathlons, bike rides, running events.
- Major Tourism Event e.g. Sculptures by the Sea, Vivid, Floriade
- Health and Fitness
- Business Events / Expos
- Arts and Culture events
- Other (please specify)

Business Survey 2024

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SECTION 6: ABOUT YOU

Optional. Please add your name and best contact details to enter the Prize Draw. Your answers will remain confidential in line with our [Privacy Statement](#).

Provide your name and best contact details (email and/or phone number) in order to enter the Prize Draw. *T&Cs apply

Business Name:

Note: Optional

How did you hear about this survey?

(Choose all that apply) (Required)

- Join the Conversation website
- BusinessNow E-Newsletter
- Other E-Newsletter
- Advertising
- Social media
- Email
- Word of mouth / from a neighbour / family member
- Other (please specify)

The information contained herein is believed to be reliable and accurate, however, no guarantee is given as to its accuracy and reliability, and no responsibility or liability for any information, opinions or commentary contained herein, or for any consequences of its use, will be accepted by Micromex Research, or by any person involved in the preparation of this report.



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