



THE SAMOA CHAMBER OF COMMERCE
BUSINESS CONFIDENCE SURVEY REPORT
2020-2021

Business Confidence Survey Report
2020-2021

Executive Summary

The Samoa Chamber of Commerce and Industry, Samoa's National Private Sector Organization, is pleased to present the 2020-2021 Business Confidence Survey Report.

The Business Confidence Survey (BCS) was conducted from December 2020 – February 2021 with a total of 473 responses. It aims to capture the level of confidence of business owners about the prospects of their businesses over the next financial year. It further aims to highlight whether Samoa's current business environment is conducive to growth.


This report is intended to support the Chamber's analysis of Samoa's current business conditions. This is to provide sensible recommendations as to how responsible government bodies and private sector stakeholders can enable business growth, investment, trade, and employment in Samoa.

Highlights from the Business Confidence Survey Report include;

- ✚ 52% of respondents reported a major decrease in profits in the last 12 months while only 4% of respondents indicated a major increase. A combined total of 33% of respondents expect profits to slightly increase (26%) and majorly increase (7%).
- ✚ According to our survey results, businesses are uncertain about the general business conditions in the coming 12 months. While 30% of respondents indicated that general business conditions will slightly improve, 27% indicated that general business conditions would remain the same. 24% of respondents who believe that the general business conditions will slightly worsen.
- ✚ The top three significant constraints to growth were reported to be Cost of Doing Business, Government Taxes and Charges and Low Demand of Goods and Services.
- ✚ Majority of respondents ranked Infrastructure (86%), Private Sector Development and Support (73%) and Public Administration (63%) as the three sectors that have the most impact, reporting either having major impact or some impact on their business.

For more information or questions please contact your Chamber secretariat.

Thank you,



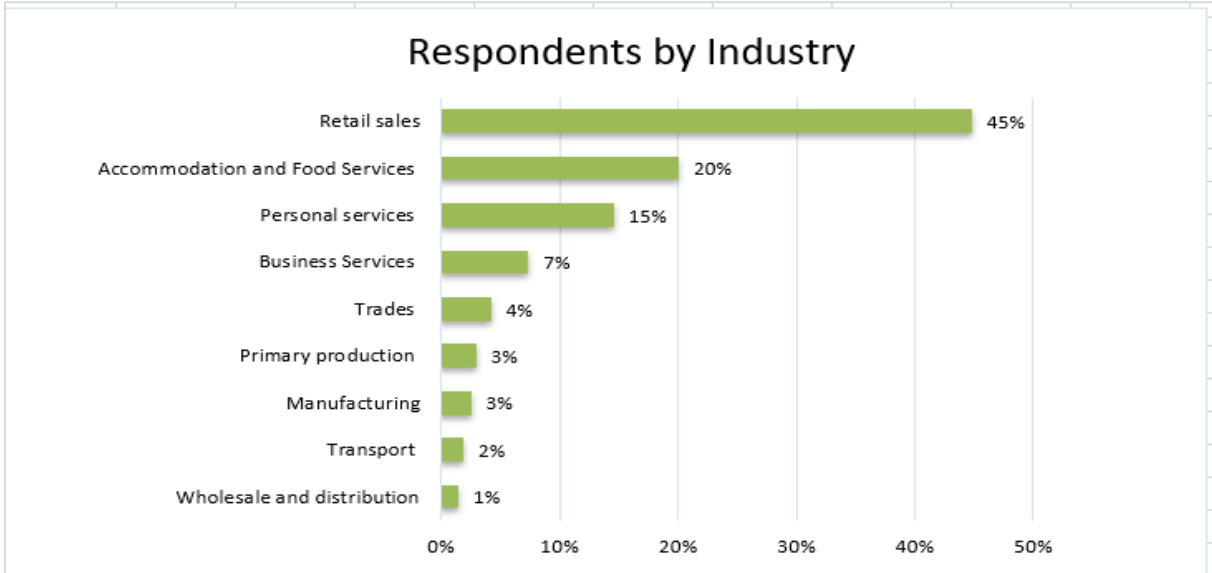
Lemauga Hobart Vaai
Chief Executive Officer
Samoa Chamber of Commerce

Table of Contents

Executive Summary.....	3
Section 1: Business Characteristics.....	5
1.1 Industry Breakdown.....	5
1.2 Employment Size.....	5
1.3 Employment by Industry.....	6
1.4 Employment by Gender.....	7
1.5 Profit, Staff Numbers & Investment.....	8-10
Section 2: International Trade.....	10
2.1 Current Exporters.....	10
2.2 Types of Exporters.....	11
2.3 Trade Issues.....	12
Section 3: Business Conditions and Major Constraints.....	12
3.1 General Business Conditions.....	12
3.2 Own Business Situation.....	14
3.3 Constraints on Business Growth.....	15-17
Section 4: Recommendations to Government and Chamber.....	17
4.1 Government Spending.....	17
4.2 Recommendations for 2020-2021 Government Budget.....	18
4.3 Chamber Services.....	19
4.4 Recommendations to Chamber.....	20
Annex 1: Business Confidence Survey Data.....	21-31

Section 1: Business Characteristics

1.1 Industry Breakdown



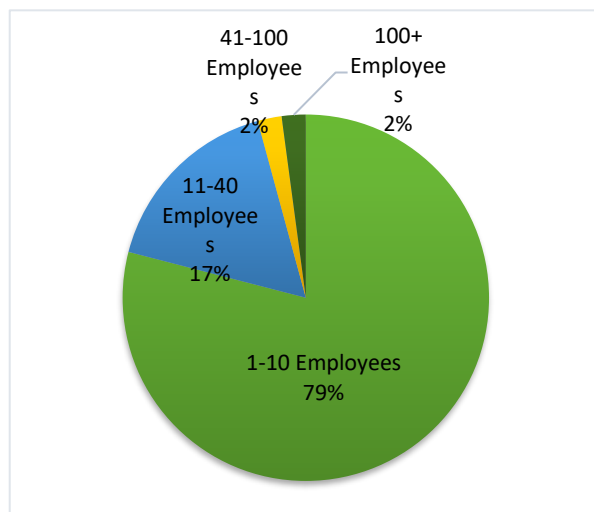
The 473 businesses that responded were asked to select the industry that best described their core business activity. The largest contributors by sector were Retail Sales (45%), Accommodation and Food Services (20%) and Personal Services (15%).

Many respondents indicated more than one core business activity (e.g. both primary production & manufacturing or both retailing and wholesale and distribution) For the classification purposes of this survey, the industry that best represents the main source of business income was selected.

1.2 Employment Size

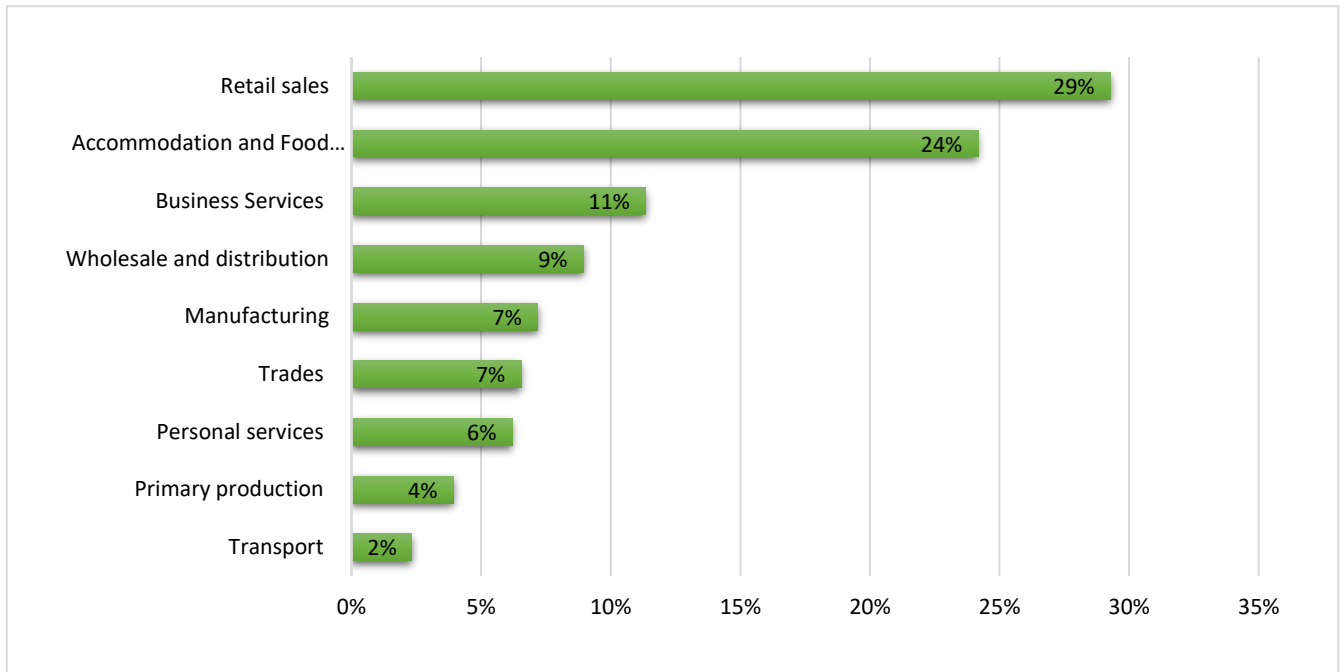
Staff numbers reported by respondents indicate that a significant majority (79%) of business respondents were small or medium sized businesses with an employment size of 1-10 employees.

17% of businesses reported having 11-40 employees. A combined total of 4% reported



having higher staff numbers, with 2% having 41-100 employees and 2% employing 100+ employees.

1.3 Employment by Industry

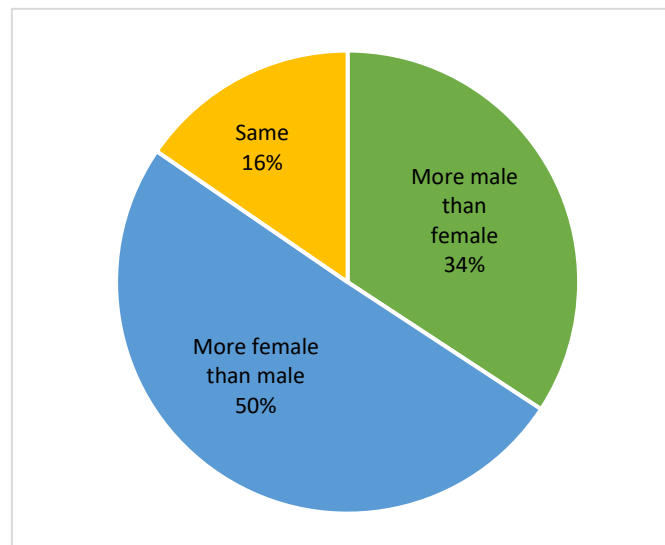


Of the survey respondents, Retail Sales represents the highest number of employment (29%) by sector, followed by the Accommodation and Food Services Sector (24%) and Business Services (11%).

Majority of small businesses (1-10 employees) were either in Retail, Accommodation and Food Services or Personal Services.

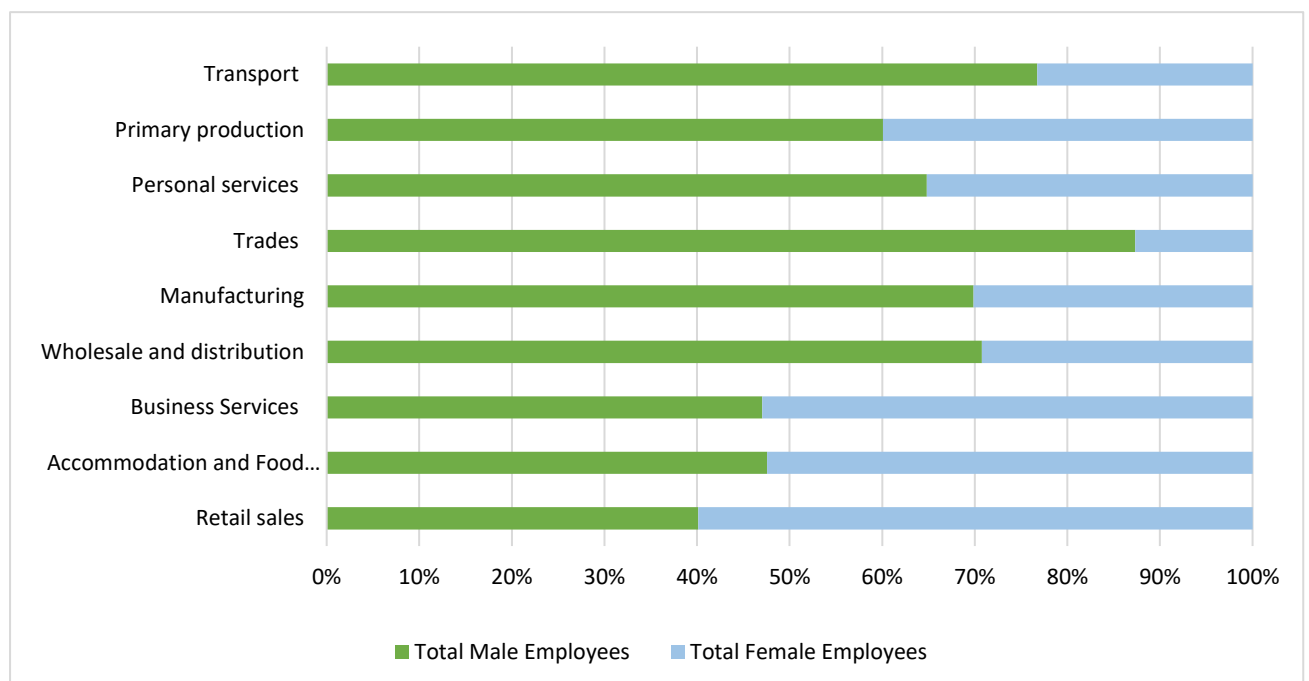
Employment Size by Industry				
Industry	1-10 Employees	11-40 Employees	41-100 Employees	100+ Employees
Wholesale and distribution	3	2	1	1
Transport	4	4	1	0
Manufacturing	5	3	2	2
Primary production	10	3	0	1
Trades	12	6	1	1
Business Services	24	8	2	1
Personal services	65	3	1	0
Accommodation and Food Services	65	25	2	3
Retail sales	185	23	2	2

1.4 Employment by Gender

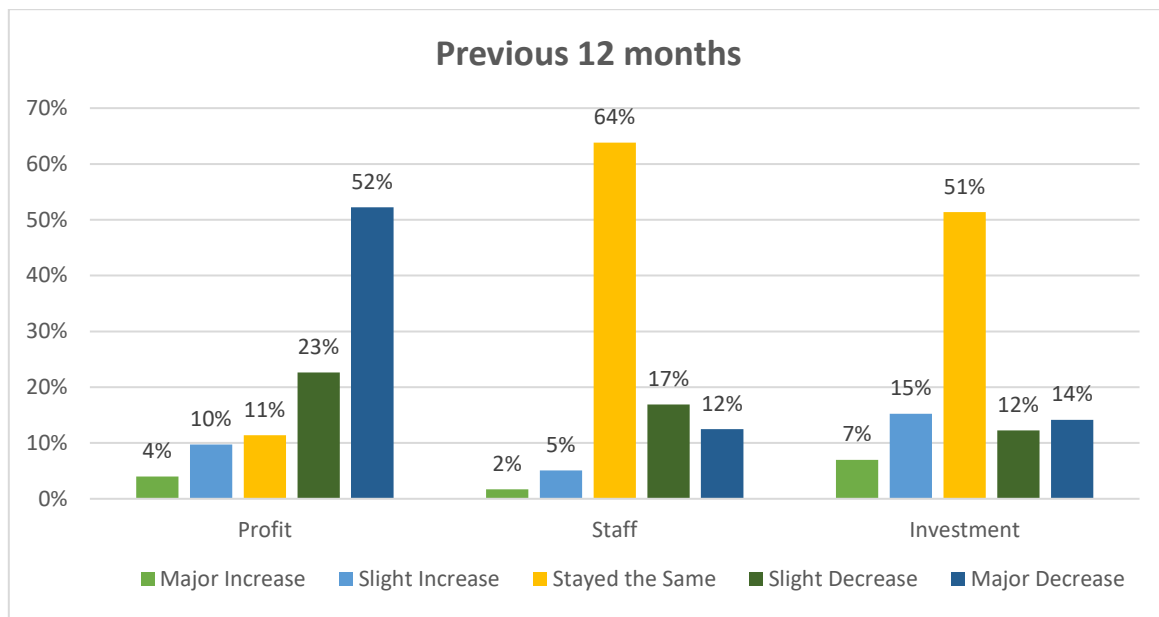


When asked about the gender breakdown of employees, 34% of respondents indicated that they employ more males than females, 50% employ more females than males and 16% indicated that they employ an even ratio of male to female employees.

The sectors with significantly higher male employment were Trades, Transport and Wholesale and Distribution. The sectors with higher female employees were reportedly Retail Sales, Accommodation and Food Services as well as Business Services.



1.5 Profit Staff & Investment



Businesses were asked to rate their performance over the last 12 months relative to the previous 12 months (i.e. their 2020 performance relative to their 2019 performance) across three categories: profit, staff numbers and investment. Respondents were asked to report on a scale of 'Major Increase' to 'Major Decrease'.

PROFITS

Slightly more than half of respondents (52%) reported a major decrease in profits in the last 12 months while only 4% of respondents indicated a major increase. 23% of respondents reported slight decrease in profits while 10% reported slight increase in profits. 11% of respondents indicated that profits remained the same in the last 12 months.

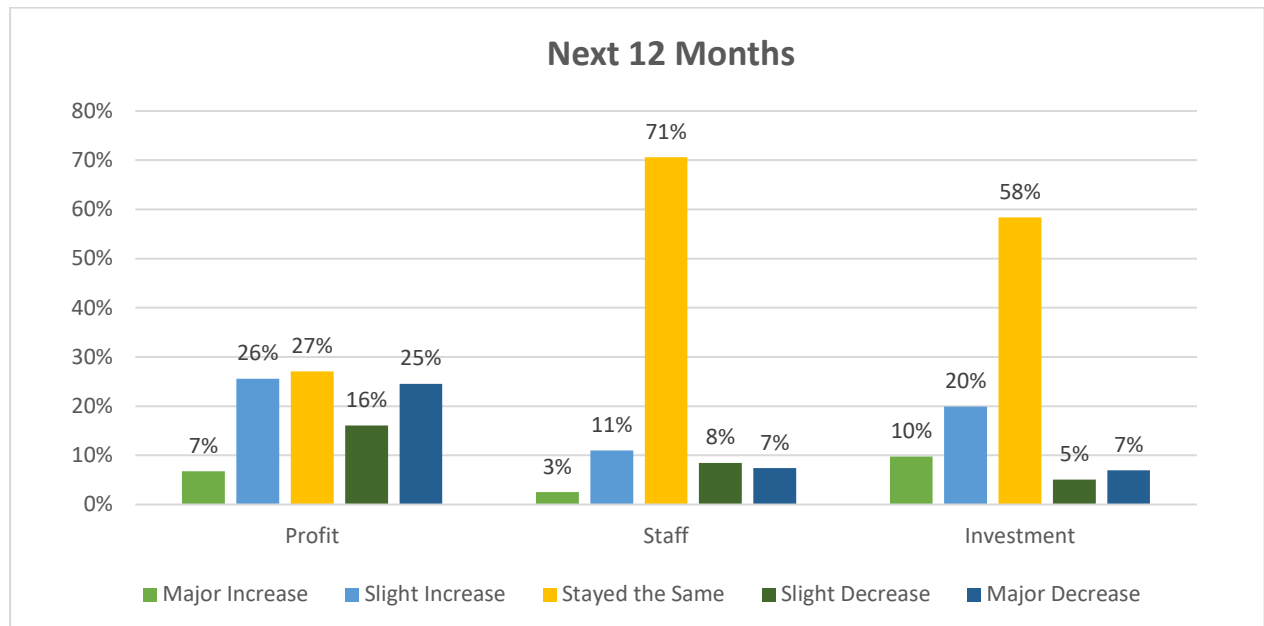
STAFF

In terms of staff recruitment, 64% reported that staff numbers remained the same in the last 12 months. A combined 29% of respondents reported that staff numbers have slightly decreased (17%) and majorly decreased (12%). A combined total of 7% of respondents reported that staff recruitment increased slightly (5%) and majorly (2%)

INVESTMENT

In the last 12 months, 51% of respondents reported that investments have remained the same, while 15% of respondents slightly increased their investments. A combined 26% of businesses reported a decrease in investments. 12% reported a slight decrease while 14% reported a major

decrease. Businesses who reported major increases in their investments account for only 7% of total respondents.



Businesses were also asked to rate their anticipated performance for the next 12 months relative to the previous 12 months (i.e. their 2021 performance relative to their 2020 performance) across three categories: profit, staff numbers and investment. Respondents were asked to report on a scale of 'Major Increase' TO 'Major Decrease'.

PROFIT

Majority of respondents are uncertain about their anticipated profits in the next 12 months. 25% of respondents expect profits to majorly decrease, while 27% expect no change in profit in the next 12 months. A combined total of 33% of respondents expect profits to slightly increase (26%) and majorly increase (7%)

STAFF

A significant majority of respondents anticipate that staff numbers will remain the same in the coming 12 months. A combined total of 14% of respondents anticipate that staff numbers will majorly increase (3%) and slightly increase (11%). A combined total of 15% of respondents anticipate a slight decrease (8%) and major decrease (7%) in staff numbers.

INVESTMENT

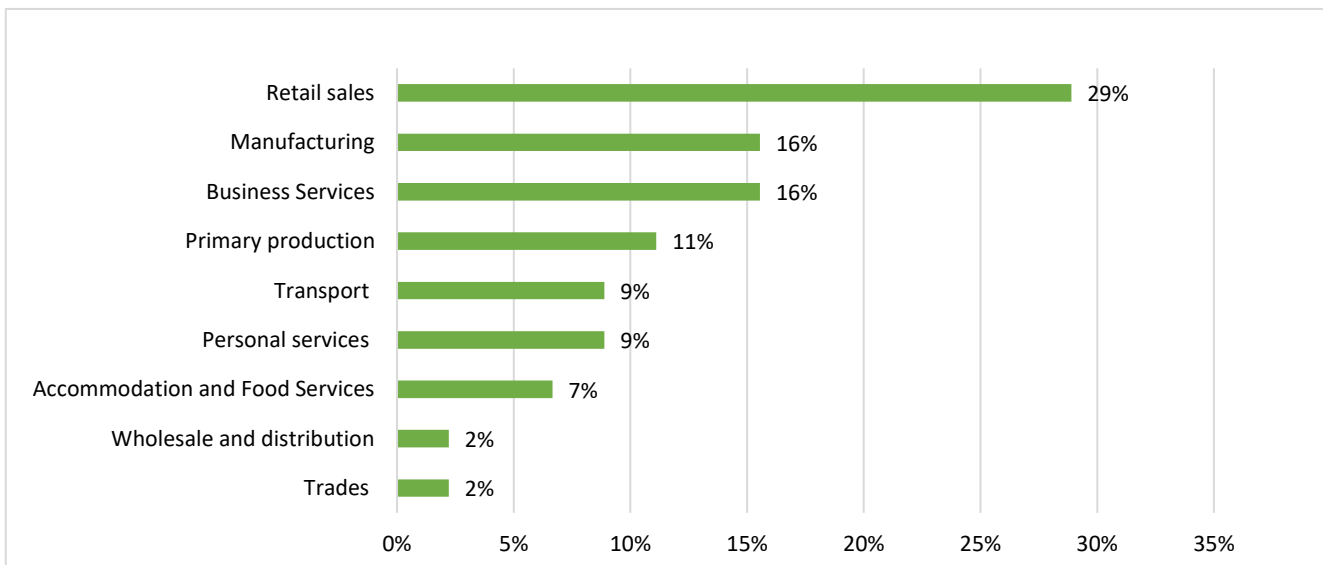
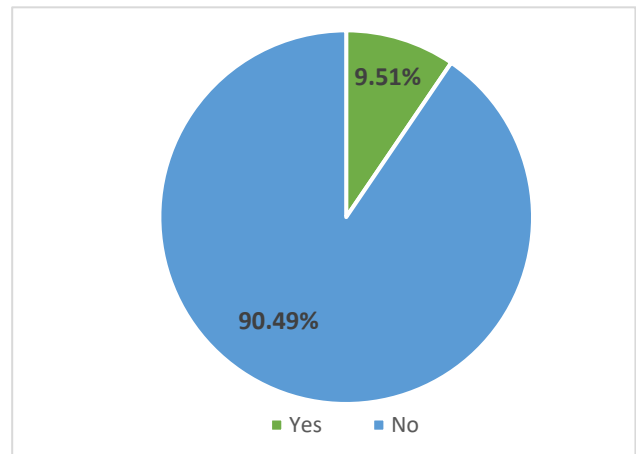
Over half of the business respondents (58%) indicated that they expect their investments to remain the same in the next 12 months. 20% of respondents anticipate slight increase while 10% anticipate major investments in the next 12 months. A combined total of 12% of respondents intend to slightly decrease (5%) and majorly decrease (7%) their investments in the coming 12 months.

Section 2. International Trade

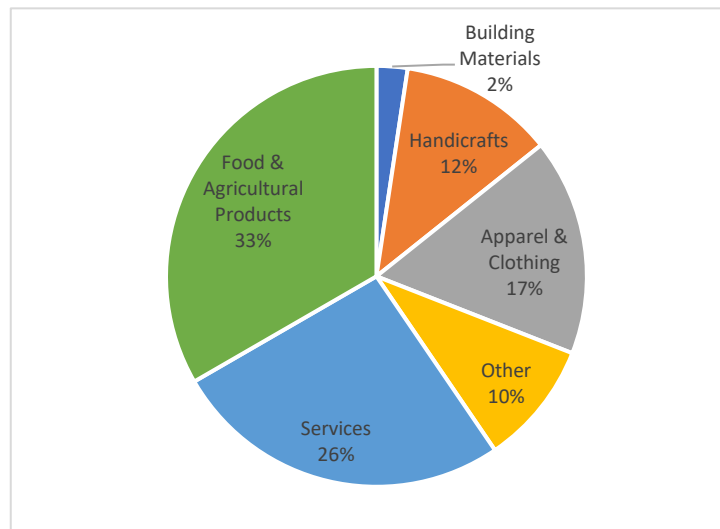
2.1 Current Exporters

Businesses were asked whether they are involved with trading of their goods or services internationally.

For the purposes of this survey, respondents were asked not to include any transactions relating to tourism and hospitality. 9.51% of respondents reported that they currently export goods or services. Of that number, Retail Sales (29%), Manufacturing (16%) and Business Services (16%) were the most represented sectors.



2.2 Types of Exports



The main exports reported by respondents comprised of Food and Agricultural Products (33%), Services (26%) and Apparel & Clothing (17%)

12% reported that they currently export Handicrafts and 2 % exporting building materials. Other exports (10%) include body and skin products.

2.3 Trade Issues



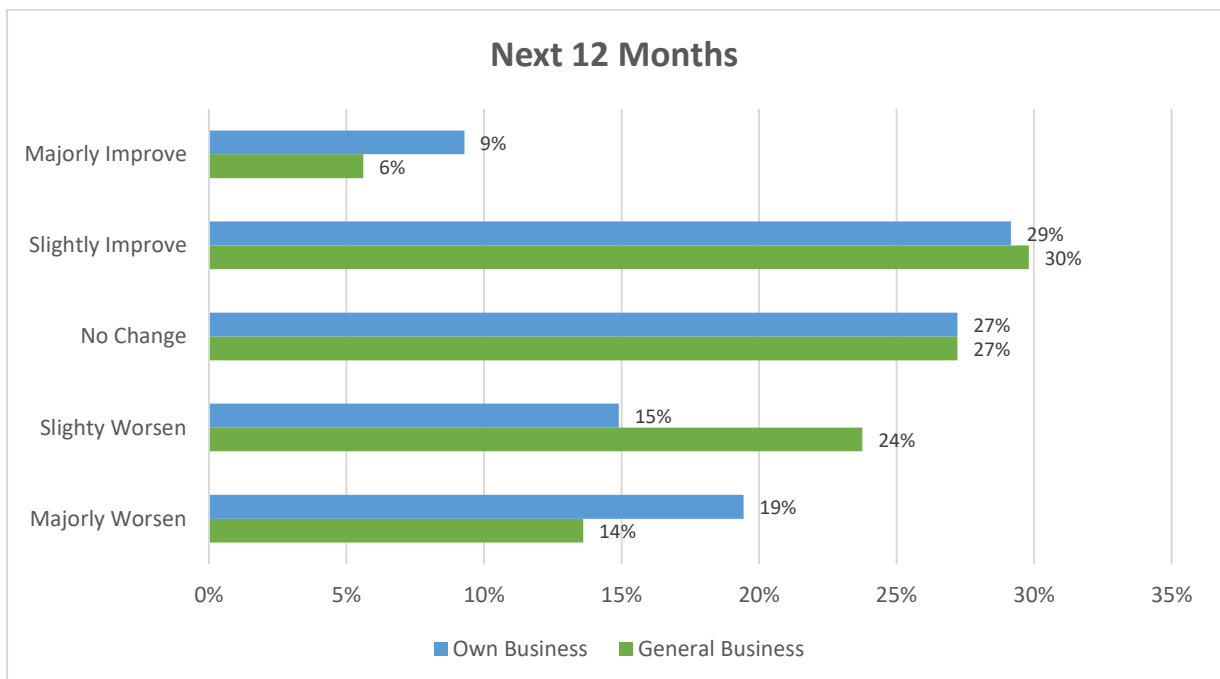
A significant majority of respondents (64%) reported a major decrease (40%) and slight decrease (24%) in their exports in the last 12 months. 21% of respondents reported slight increase in exports while 7.14% of businesses highlighted that they experienced no change.

When asked to identify the key impacts on their capacity to export goods or services, respondents reported Frequency and Cost of Shipping (38%), Finding Overseas Markets (16%), Tariffs (14%) and Government Regulations (14%) as their most significant hurdles.



Section 3. Business Conditions & Major Constraints

3.1 General Business Conditions



In regard to the General Business Conditions, businesses were asked to rate their level of confidence of Samoa's business conditions in the next 12 months (i.e. 2021 compared to 2020). Respondents selected from a scale of 'Majorly Improve' to 'Majorly Worsen'. A comment section was also provided for the respondents to give reason for their reported level of confidence.

According to our survey results, businesses are uncertain about the general business conditions in the coming 12 months. While 30% of respondents indicated that general business conditions will slightly improve, 27% indicated that general business conditions would remain the same as well as 24% of respondents who believe that the general business conditions will slightly worsen.

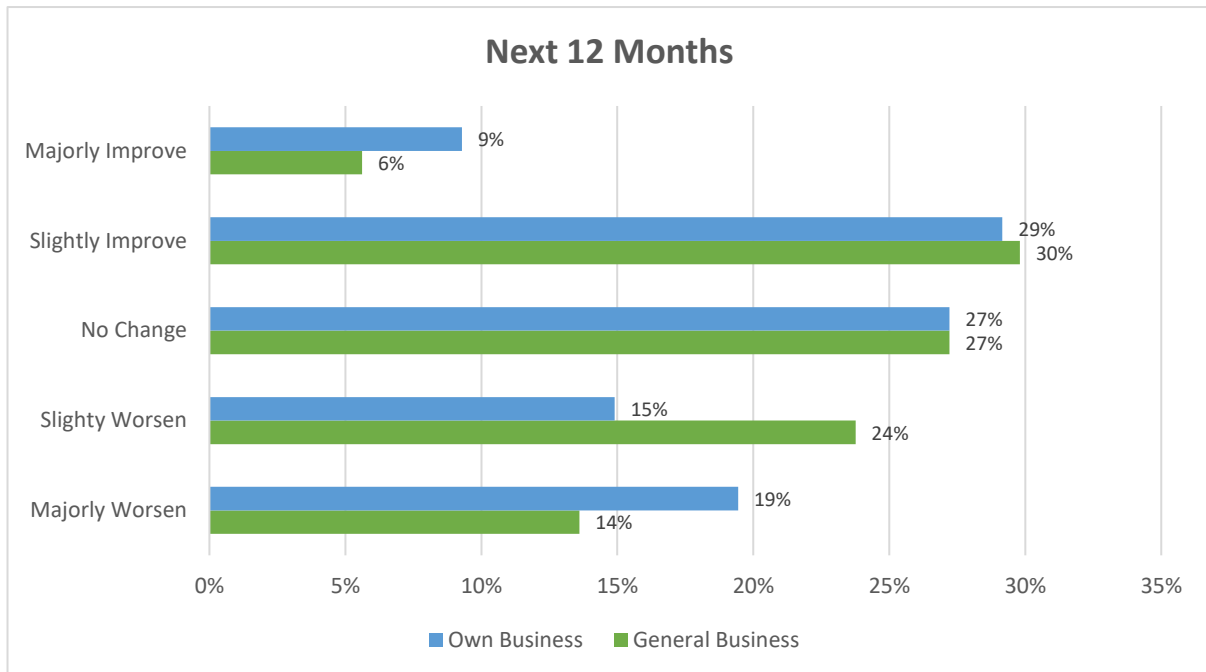
Respondents who indicated higher levels of confidence were optimistic that with the easing of SOE restrictions and Samoa's ongoing efforts to contain and prevent the spread of COVID-19, businesses can expect Samoa's general business environment to operate with less disruptions in 2021 compared to 2020. However, respondents also indicated that the impacts and uncertainties of COVID 19 on flight restrictions, shipping and cost of goods will see the business conditions of 2020 remain the same or slightly worsen for 2021.



“...2021 can be the year where opportunities present itself, Samoa would have adapted to the changes of society...”

“...When the borders do finally open, it will take some time to get back on track. Global export/import prices, lengthy shipping delays and foreign exchange rates are increasing all the time, making it very hard for a small business to be able to absorb these high costs...”

3.2 Own Business Situation



Respondents also ranked their level of confidence in their Own Business Situation for the next 12 months (i.e. 2021 compared to 2020). They selected from a scale of ‘Majorly Improve’ to ‘Majorly Worsen’. In addition, a comment section was provided for the respondents to give reason for their reported level of confidence.

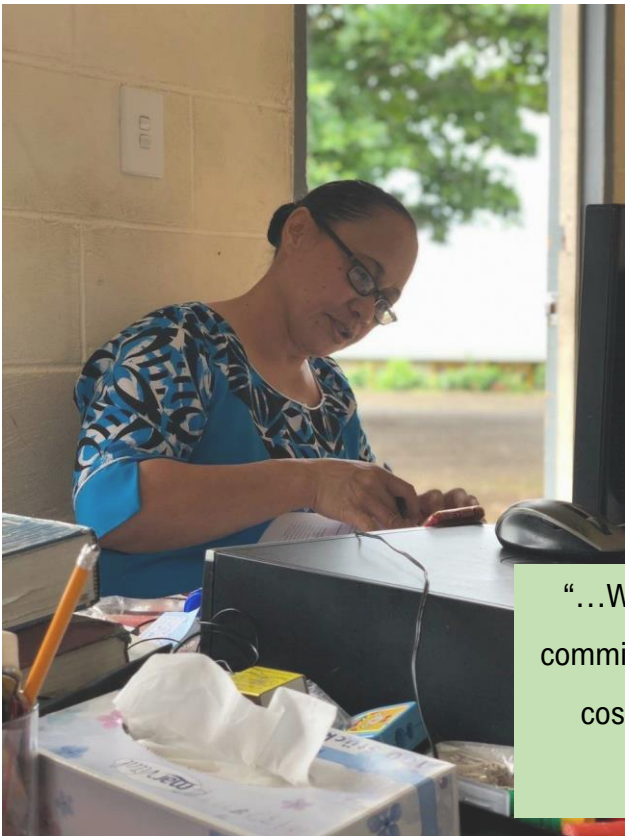
According to the survey results, respondents are less optimistic about their own business conditions compared to the general business conditions. While 38% of businesses anticipate that their business conditions will improve, 29% of businesses believe that their business conditions will worsen in the next 12 months. 27% of respondents highlighted that their business situation is expected to remain the same.

Respondents who indicated higher levels of confidence reported that the new normal of COVID-19 presents new opportunities for businesses to engage in new ways of doing business as well as diversifying business services and product offerings.

“...Being Innovate is the way to go. We will seek more overseas market for our export and introduce more product range for the loss of sales from other products...”

On the other hand, respondents believe that the impact of COVID-19 has restricted public spending, reducing demand for products and services in comparison to previous years. Moreover, border closures, flight restrictions and rising shipping costs will continue to have a domino effect on local businesses and local exports. Hence, 29% of respondents are less optimistic about their own business situation.

27% of the respondents who reported that their business situation will remain the same highlight that conditions remain uncertain due to COVID-19. Respondents are less confident to make optimistic assumptions as such business conditions have not enabled significant business growth.

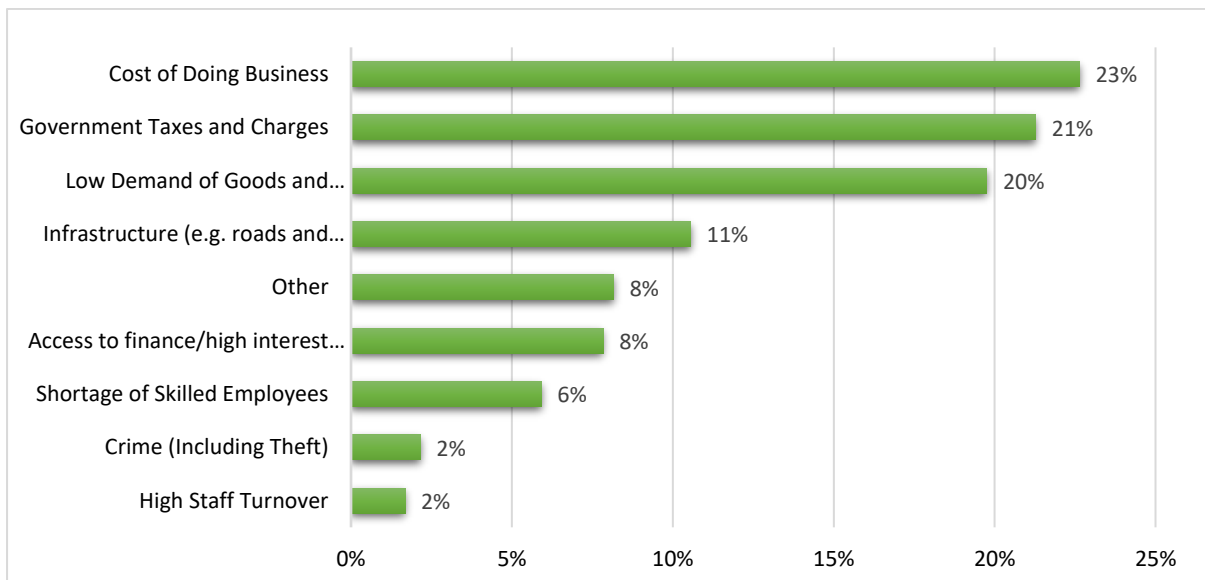


“...We don’t have enough money coming in to make a profit or to commit to any new investments – sales have dropped while business costs (For example, business licenses) remain the same or are increasing...”

3.3 Constraints on Business Growth

Businesses were asked to identify the top three significant constraints to their business growth and success. In addition, a comment section was added for businesses to provide detailed comments on their selected constraints. Businesses selected from the following:

- Government Taxes and Charges
- Shortage of Skilled Employees
- Low Demand of Goods and Services
- Crime (Including Theft)
- Infrastructure (e.g. electricity, fuel, water ICT)
- Access to Finance
- High Staff Turnover



The top three significant constraints to growth were reported to be Cost of Doing Business, Government Taxes and Charges and Low Demand of Goods and Services.

Businesses highlighted that the disruptions of COVID-19 (flight restrictions, availability of goods and services, increased shipping fees and charges etc.) continue to constrain revenue earnings for businesses. Respondents reported that lower demand in the past 12 months has made it challenging for them to keep up with business costs. In particular, the cost of business licenses and monthly rental spaces.

Respondents also highlighted that the TIMS system imposed by government is crippling small businesses. Not only is it costly but the timeframe given by Government for businesses to adopt the system is reported to be unreasonable.

Constraints highlighted as 'Other' are SOE restrictions causing disruptions to business operations, as well as high competition caused by fluctuation of the availability and the increasing cost of goods and services.

Section 4: Recommendations to Government & Chamber

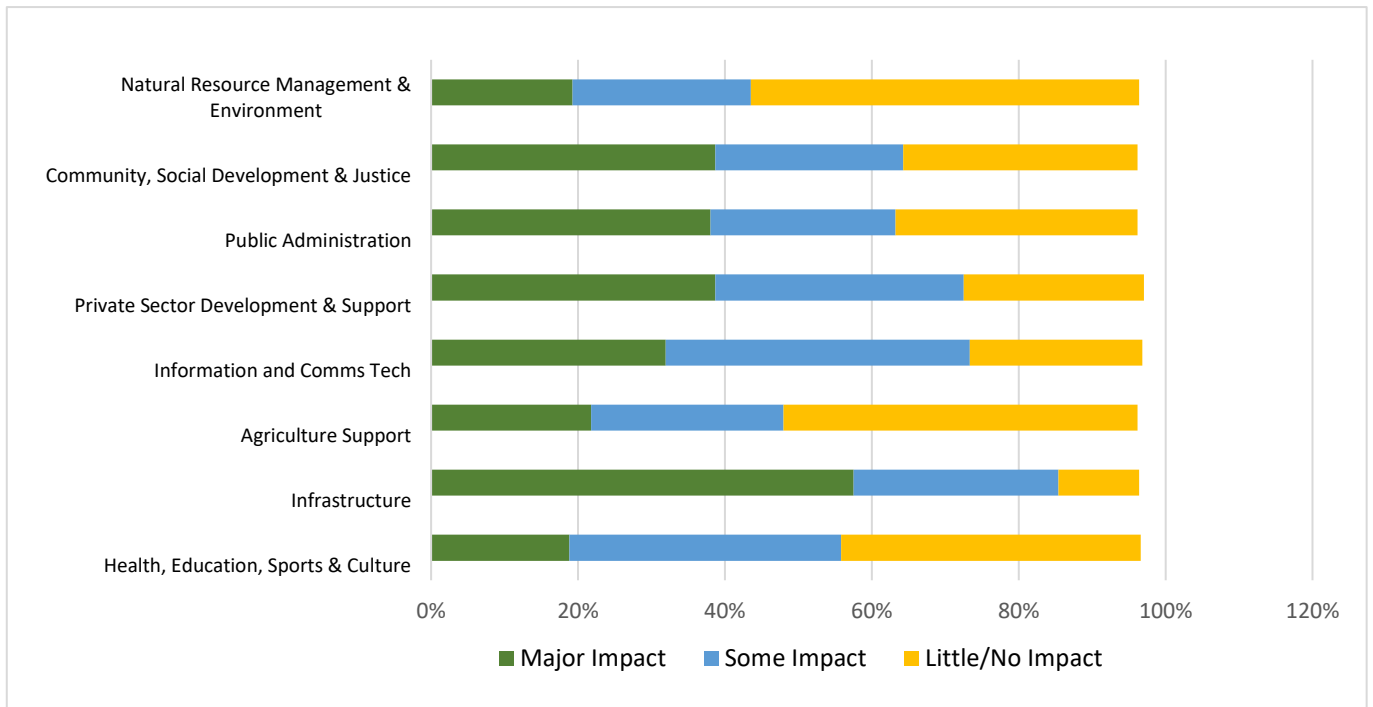
4.1 Government Spending

Businesses were asked to rank the direct impact of government spending to their business for the following areas by selecting Major Impact, Some Impact or Little or No Impact:

- Health Education, Sports and Culture.
- Infrastructure
- Agricultural Support
- Information and Communications Technology
- Private Sector Development Support
- Public Administration.
- Community and Social Development
- Natural Resource Management and Environment

Majority of respondents ranked Infrastructure (86%), Private Sector Development and Support (73%) and Public Administration (63%) as the three sectors that have the most impact reporting either having major impact or some impact on their business.

The sectors with reported little to no impact included Natural Resource Management and Environment (53%), Agriculture Support (48%) and Education Sports and Culture (41%).



4.2 Recommendations for 2020-2021 Government Budget

Businesses were asked to provide suggestions for the 2019/2020 Government Budget. The most frequently reported recommendations were categorized under the following:

Suggestions for Budget	#
Policy & Regulation	131
Private Sector Support	80
Financial Support	50
Infrastructure	22
Education & Training	15
Agriculture Support	8
Health	6

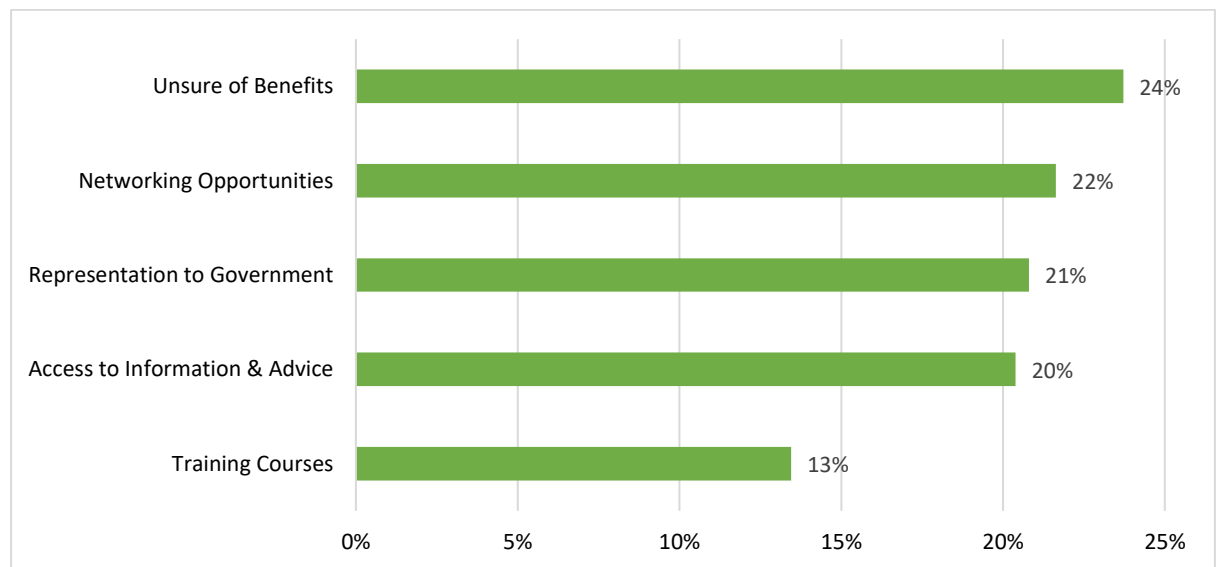
The most prominent suggestions for Government Budget by survey respondents was in regard to Policy and Regulations. Majority of respondents reported the need for taxes and charges, particularly business licenses to be reduced whilst businesses recover from the last 12 months with the SOE lockdown periods. Lowering tax rates was also reported as a key suggestion to offset rising shipping costs that continue to fluctuate the price of goods. Moreover, respondents

highlighted that with the enforcement of the TIMS system, government should delay its enforcement period or support businesses by way of training and capacity building programs. Respondents urged the government to consider the current business conditions, the cost of establishing TIMS and the short timeframe that has been given to businesses to undertake this activity.

“...Reduce cost of doing business. More balanced taxation system. Remove TIMS and wait until economy picks up again...”

Targeted government assistance for the tourism industry was also prominent in the responses for greater private sector support. Other recommendations were in response to poor infrastructure and drainage systems in the CBD that resulted in flooding during the wet season.

4.3 Chamber Services



Businesses were asked to select the benefits of Samoa Chamber of Commerce to gauge how the value of Chamber is perceived in the business community. Note that many businesses selected more than one option. In addition, 30% of total respondents are members of the Chamber whilst 70% of respondents are not members of the Chamber.

4.4 Recommendations to Chamber

Businesses were asked what the Chamber could do to help them in the coming year. The three most prominent responses were regarding Chamber's advocacy work with Government, Business support services and Training Opportunities.

According to the survey responses, 58% highlighted that Chamber must continue to advocate to Government for an enabling environment for small businesses. In addition, respondents indicated that the Chamber should continue to advocate for a level playing field for all businesses. With the impacts of COVID-19 still ongoing, respondents urged government to ease business costs or provide support during a very tough season for business.

28% of respondents recommended that the Chamber continue their business support services. In particular, access to information and business support programs (trainings, financial assistance, internship programs, youth entrepreneurship workshops etc.)

17% of respondents urged the Chamber to provide training opportunities for employees. Unfortunately, the Chamber's service in partnership with the National University of Samoa under the Education Sector Support Programme was restructured and funding for Chamber to facilitate trainings has been ceased. Nevertheless, the Chamber continues to seek opportunities with other agencies to be able to provide its members with training programs (customer service, business management, ICT etc).

Annex 1: Business Confidence Survey Data

Annex 1 sets out the data from the 2020-21 Business Confidence Survey as well as data from the 2014-15, 2015-16, 2016-17, 2017-18, 2018-19 and 2019-2020 surveys.

Percentages have been calculated based on the number of *total valid responses* to a given question and are rounded in the data summary to 2 decimal places. Each table shows the total responses. The total responses may be;

- the same as the total number of that year’s respondents if every respondent answered the question
- more than the total number of that year’s respondents if respondents were allowed to provide more than one response, or
- fewer than the number of that year’s total respondents if some respondents chose not to answer the question.

Note that for the 2016-17 survey, an extensive review of the survey methodology and several questions were changed as a result. Therefore, some data collected in previous years has been dropped, while other data collected is new to this year and therefore a time series is not available.

Survey Details:

Year	Month survey was open	Total respondents
2014-15	January-February	46
2015-16	January-February	87
2016-17	October-November	172
2017-2018	October-January	184
2018-2019	December-January	261
2019-2020	December-February	372
2020-2021	December-February	473

1. Which category best describes your core business activity?

Industry sector	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Primary Production (agriculture, fisheries)	2	4.35%	4	4.60%	19	11.05%	17	9.24%	24	9.20%	5	1.34	14	2.96%
Wholesale and Distribution	3	6.52%	2	2.30%	7	4.07%	9	4.89%	6	2.30%	6	1.61	7	1.48%
Retail	11	23.91%	11	12.64%	36	20.93%	44	23.91%	82	31.42%	144	38.71	212	44.82%
Trades (construction, mechanical, electrical)	2	4.35%	5	5.75%	12	6.98%	13	7.07%	15	6.90%	16	4.30	20	4.23%
Personal Services (hair & beauty, tailoring etc)	3	6.52%	8	9.20%	27	15.70%	37	20.11%	65	24.90%	90	24.19	69	14.59%
Manufacturing	4	8.70%	12	13.79%	5	2.91%	8	4.35%	10	3.83%	15	372	12	2.54%
Transport (shipping, logistics, etc)	1	2.17%	4	4.60%	4	2.33%	2	1.09%	4	1.53%	13	3.49	9	1.90%
Education & training	0	0.00%	1	1.15%	0	0.00%	1	0.54%	-	-	1	.27	-	-
Tourism & Hospitality (hotels, cafes, restaurants etc)	10	21.74%	17	19.54%	31	18.02%	31	16.85%	37	14.18%	65	17.47	95	20.08%
Business Services (consultancy, legal, accountancy etc)	10	21.74%	23	26.44%	27	15.70%	20	10.87%	18	5.75%	17	4.57	35	7.40%
Other	-	-	-	-	4	2.33%	2	1.09%	-	-	-	-	-	-
Total Responses:	46	100.00%	87	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.00	473	100.00%

2. How many employees does your business have? *

No. of employees	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Response														
Very small: 1 to 10	16	39.02%	43	49.43%	116	68.24%	140	76.09%	201	77.01%	292	78%	373	79.02%
Small: 11 to 40	15	36.59%	23	26.44%	41	24.12%	34	18.48%	46	17.62%	59	16%	80	16.94%
Medium: 41 to 100	9	21.95%	13	14.94%	10	5.88%	7	3.80%	13	4.98%	15	4%	10	2.11%
Large: 100+	1	2.44%	8	9.20%	3	1.76%	3	1.63%	1	0.38%	6	2%	10	2.11%
Total Responses:	41	100.00%	87	100.00%	170	100.00%	184	100.00%	261	100.00%	372	100.00%	473	100.00%

3. What is the gender balance of employees at your workplace? *

Gender Balance	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Response														
More men than women	13	32.50%	32	36.78%	90	52.94%	88	47.83%	137	52.49%	144	39%	162	34.25%
About equal	15	37.50%	17	19.54%	62	36.47%	22	11.96%	41	15.71%	60	16%	73	15.43%
More women than men	12	30.00%	38	43.68%	18	10.59%	74	40.22%	83	31.80%	168	45%	238	50.32%
Total Responses:	40	100.00%	87	100.00%	170	100.00%	184	100.00%	261	100.00%	372	100.00%	473	100.00%

*Note: The reported employment of two respondents has been excluded (2016-2017)

4. Do you expect the number of staff employed by your business to increase, stay the same or decrease in the next 12 months?

Number of staff in next 12 months	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Increase (hope to hire more)	22	55.00%	46	52.87%	58	33.72%	84	40.22%	95	36.40%	138	37.10%	64	13.53%
Stay the same	16	40.00%	41	47.13%	105	61.05%	94	51.09%	157	60.15%	215	57.80%	334	70.61%
Decrease (need fewer staff)	2	5.00%	0	0.00%	9	5.23%	16	8.70%	9	3.45%	19	5.11%	75	15.86%
Total Responses:	40	100.00%	87	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.00%	473	100.00%

5. Do you expect the amount of new investment during the next twelve months to be greater, the same, or less than the investment made last year?

New Investment in 2016	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
More new investment	21	52.50%	49	56.32%	94	54.65%	100	54.35%	121	46.36%	199	53.49%	140	29.60%
Same amount as last year	9	22.50%	22	25.29%	71	41.28%	72	39.13%	126	48.28%	155	41.67%	276	58.35%

Less new investment	10	25.00%	16	18.39%	7	4.07%	12	6.52%	14	5.36%	18	4.84%	57	12.05%
Total Responses:	40	100.00%	87	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.00%	473	100.00%

6. Do you export any of your goods/services?

Export	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Yes	19	46.15%	33	37.93%	21	12.21%	29	15.76%	27	10.34%	30	8.06%	45	10,00%
No	21	53.85%	54	62.07%	151	87.79%	155	84.24%	234	89.66%	342	91.94%	428	90,00%

7. Do you expect that the general business situation in Samoa will improve, remain the same or worsen this year as compared to last year?

General Business Situation	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Improve	21	52.50%	57	65.52%	72	41.86%	88	47.83	152	58.24%	184	66.67	164	35.42%
Stay the same	14	35.00%	20	22.99%	42	24.42%	50	27.17%	84	32.18%	83	19.89	126	27.21%
Worsen	5	12.50%	10	11.49%	58	33.72%	46	25.00%	25	9.58%	105	13.44	173	37.37%
Total Responses:	40	100.00%	87	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100%	463	100.00%

8. Do you expect that your own business situation will improve, remain the same or worsen this year as compared to last year?

Own Business Situation	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
Response	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Improve	26	65.00%	67	77.01%	113	65.70%	121	65.76%	188	72.03%	248	66.67%	178	38.44%
Stay the same	10	25.00%	12	13.79%	34	19.77%	36	19.57%	61	23.37%	74	19.89%	126	27.21%
Worsen	4	10.00%	8	9.20%	25	14.53%	27	14.67%	12	4.60%	50	13.44%	159	34.34%
Total Responses:	40	100.00%	87	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.00%	463	100,00%

9. What are the top three most significant constraints to your business growth and success?

Significant Constraints	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
Response	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Infrastructure	3	2.61%	11	4.31%	38	8.17%	34	6.34%	43	5.54%	88	8.62%	132	10.56%
Crime	5	4.35%	15	5.88%	24	5.16%	26	4.85%	38	4.90%	56	5.48%	27	2.16%

Low demand for goods/services	8	6.96%	20	7.84%	53	11.40%	48	8.96%	69	8.89%	113	11.07	247	19.76%
Other	13	11.30%	21	8.24%	20	4.30%	39	7.28%	39	5.03%	14	1.37	102	8.16%
Access to finance/high interest rates	15	13.04%	36	14.12%	66	14.19%	78	14.55%	104	13.40%	107	10.48	98	7.84%
Govt taxes/charges	19	16.52%	46	18.04%	74	15.91%	100	18.66%	160	20.62%	221	21.65	266	21.28%
Shortage of skilled employees	23	20.00%	49	19.22%	68	14.62%	61	11.38%	110	14.18%	141	13.81	74	5.92%
Business costs	29	25.22%	57	22.35%	100	21.51%	131	24.44%	179	23.07%	233	22.82	283	22.64%
High Staff Turnover	-	-	-	-	22	4.73%	19	3.54%	34	4.38%	48	4.70	21	1.68%
Total Responses:	115	100.00%	255	100.00%	465	100.00%	536	100.00%	776	100.00%	1021	100%	1250	100.00%

10. What direct impact does Government spending in these areas have on your business?

Government expenditure	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020			
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Public administration														

No/little effect	14	35.90%	32	37.21%	107	62.21%	92	50.00%	107	41.00%	169	45.43%	156	32.98%
Some assistance	19	48.72%	40	46.51%	46	26.74%	59	32.07%	101	38.70%	154	41.40%	119	25.16%
Major assistance	6	15.38%	14	16.28%	19	11.05%	33	17.93%	53	20.31%	49	13.17%	180	38.05%
Total Responses:	39	100.00%	86	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.00%	455	100.00%
Agriculture support	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No/little effect	16	39.02%	42	50.60%	97	56.40%	108	58.70%	121	46.36%	211	58.72%	228	48.20%
Some assistance	19	46.34%	27	32.53%	46	26.74%	42	22.83%	93	35.63%	100	26.88%	124	26.22%
Major assistance	6	14.63%	14	16.87%	29	16.86%	34	18.48%	47	18.01%	61	16.40%	103	21.78%
Total Responses:	41	100.00%	83	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100%	455	100.00%
Community & social	#	%	#	%	#	%	#	%	#	%	#	%	#	%

development, justice&policing														
No/little effect	17	44.74%	37	43.02%	97	56.40%	89	48.37%	117	44.83%	162	43.55%	151	31.92%
Some assistance	15	39.47%	36	41.86%	57	33.14%	66	35.87%	102	39.08%	132	35.48%	121	25.58%
Major assistance	6	15.79%	13	15.12%	18	10.47%	29	15.76%	42	16.09%	78	20.97%	183	38.69%
Total Responses:	38	100.00 %	86	100.00 %	172	100.00 %	184	100.00 %	261	100.00 %	372	100.00 %	455	100.00 %
Health, education, sports & culture	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No/little effect	8	21.62%	36	41.86%	105	61.05%	95	51.63%	109	41.76%	172	46.24%	193	40.80%
Some assistance	19	51.35%	32	37.21%	52	30.23%	60	32.61%	94	36.02%	127	34.14%	175	37.00%
Major assistance	10	27.03%	18	20.93%	15	8.72%	29	15.76%	58	22.22%	73	19.62%	89	18.82%
Total Responses:	37	100.00 %	86	100.00 %	172	100.00 %	184	100.00 %	261	100.00 %	372	100.00 %	455	100.00 %

11. What direct impact does Government spending in these areas have on your business? (cont.)

Government expenditure	2014-15		2015-16		2016-17		2017-2018		2018-2019		2019-2020		2020-2021	
Natural resource management & environmental protection	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No/little effect	16	42.11%	32	37.65%	107	62.21%	83	45.11%	118	45.21%	181	48.66	250	52.85%
Some assistance	13	34.21%	33	38.82%	43	25.00%	62	33.70%	96	36.78%	128	34.41	115	24.31%
Major assistance	9	23.68%	20	23.53%	22	12.79%	39	21.20%	47	18.01%	63	16.94	91	19.24%
Total Responses:	38	100.00%	85	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.0	455	100.00%
ICT	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No/little effect	7	18.42%	24	27.91%	74	43.02%	65	35.33%	94	36.02%	125	33.60	111	23.47%
Some assistance	17	44.74%	26	30.23%	52	30.23%	67	36.41%	101	38.70%	138	37.10	196	41.44%
Major assistance	14	36.84%	36	41.86%	46	26.74%	52	28.26%	66	25.29%	109	29.30	151	31.92%
Total Responses:	38	100.00%	86	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.0	455	100.00%

Private sector development & support	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No/little effect	5	12.50%	13	14.94%	44	25.58%	61	33.15%	97	37.16%	151	40.59	116	24.52%
Some assistance	18	45.00%	35	40.23%	66	38.37%	51	27.72%	91	34.87%	126	33.87	160	33.83%
Major assistance	17	42.50%	39	44.83%	62	36.05%	72	39.13%	73	27.97%	95	25.54	183	38.69%
Total Responses:	40	100.00%	87	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.0	455	100.00%
Infrastructure	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No/little effect	6	15.38%	21	24.14%	62	36.05%	74	40.22%	109	41.76%	117	31.45	52	10.99%
Some assistance	24	61.54%	26	29.89%	58	33.72%	58	31.52%	93	35.63%	139	37.37	132	27.91%
Major assistance	9	23.08%	40	45.98%	52	30.23%	52	28.26%	59	22.61%	116	31.18	272	57.51%
Total Responses:	39	100.00%	87	100.00%	172	100.00%	184	100.00%	261	100.00%	372	100.0	455	100.00%