

Sunshine Coast

Business Confidence Survey

NOVEMBER 2016

Report released January 2017

Supported by Sunshine Coast Council
Conducted by Boardroom Business
Queensland, Australia



Business Confidence is a unique barometer of economic activity. It is the measurement of what businesses **THINK** is going to happen in the future. Therefore business confidence reports are one of the few **forward projecting** data sets available to the business community.

Business confidence reports are however, one of many sources of information available to businesses. Because of the uncertainty involved it is highly recommended that a variety of information sources be utilised by both the business community and policy makers for decision-making.

Boardroom Business, in partnership with the many business and government organisations on the Sunshine Coast, set about to understand confidence levels over time and created this series of Coast-wide surveys.

The objective was to assist local businesses in their decision-making by understanding **LOCAL** data and information. Businesses therefore do not have to solely rely on national data, or the media, for information on business confidence levels.

This survey is supported by the Sunshine Coast Council and we would like to thank them for their help with this initiative.

We would also like to thank the many Chambers of Commerce and business groups who helped distribute the survey. Their efforts are truly appreciated.

“ Quite frankly there is no better place to be than the Sunshine Coast at this time. We are shaping a prosperous future for our community. It's a future which offers enduring employment opportunities, better access to facilities and services, greater connectivity between communities and an outstanding natural environment. In short, we are shaping a region - and a future - that is healthy, smart and creative. We are a region that is vigorous in its approach and clever in how it tackles challenges and pursues opportunities. This region thinks outside the square to generate new ideas for how we build our economy, maintain our fantastic lifestyle, support our communities and preserve our natural assets.

There is considerable activity occurring that is helping us to achieve the strong economic position and high business confidence that we are now able to claim. Our region has more than \$10 billion committed, or in the pipeline, in major public and private investment in the region.

Following its official sod turning in February, the new Maroochydore City Centre, a project that will deliver more than 30,000 jobs by 2040 and a \$4.4 billion contribution to the Sunshine Coast economy, is now in the early stages of civil works. The \$1.8 billion Sunshine Coast University Hospital – the largest health infrastructure project in Australia at this time – is due to open in April this year.

On top of these game-changing projects we have seen the \$3 billion Palmview master planned community and the \$400 million redevelopment of Sunshine Plaza recently commence.

The Sunshine Coast Airport Expansion Project also now has its approvals in place and construction will commence this year, with the expanded Airport contributing \$4.1 billion to the region's economy through to 2040.

Our council looks forward to seeing these and other proposals for the CBD develop to contract and announcement stage in 2017.”

*Mark Jamieson, Mayor,
Sunshine Coast Council*



EXECUTIVE SUMMARY

BUSINESS CONFIDENCE IS NINE POINTS ABOVE THE AVERAGE

Overview

The Sunshine Coast Business Confidence Index reflected a nine-point increase to the year on year average (116/107)*¹. Recent survey feedback reflected a consistent, positive regional business performance sentiment while indicating a solid growth outlook for the immediate six months, with FY 2017/18 shaping up to be rewarding.

The survey focused on business profitability, capital investment and smart city framework components. Business constraints such as broadband availability, rising costs, high wages and skilled staff availability were highlighted. The results showed a consistent theme of a challenging business environment with an optimistic outlook.

The most compelling message was business' desire to improve profitably through infrastructure development; undertake effective technology based marketing initiatives, streamlined and flexible Government/Council support and attract higher skilled and accountable staff.

Encouraging feedback reflected stability, where ninety percent of responders expect the same (or an increased) level of capital investment over the next six months. Eighty eight percent expected the same (or increased) profitability levels. Ninety two percent will maintain the same (or increase) staffing levels.

Deloitte's Access Economics 2016/17 business growth outlook*² reflected; 'Queensland growth in 2015-16 was revised down from 2.8 to 1.9 per cent, but to be strongest in Australia from 2016-17 onwards... so all things being equal the upside is on its way.

Smart City

The Smart City response was very supportive especially where financial efficiency gains are to be made. Comments such as 'This initiative will improve community resilience during severe weather events', 'elevating the digital economy infrastructure will serve this region powerfully' and 'safer and more inviting environment' is all good and constructive feedback.

IoT (Internet of Things) awareness has actively turned to action. For example; sixty eight percent of participants are either considering or working on IoT Upgrades and Systems and Culture, therefore technology confidence and adaption is growing

throughout the region. In contrast, some additional entry challenges include business IoT budgets, time constraints to implement, lack of skills and businesses unsure where to start, were an influencing factor on IoT incorporation.

Summary

In Summary, the 2016 Sunshine Coast Business Confidence Survey results maintained a consistently high index score to that of previous years with a view of an optimistic business outlook. Participants continued to support the survey initiative and suggested ideas to incorporate business growth and development.

The encouraging news is that although there is a challenging business environment the survey reflected an overall positive picture. The majority of participants expect an increase (or the at least the same) level of capital investment and profitability over the next six months. Most will maintain the same or increase staffing levels.

The Sunshine Coast Council working with the Combined Chamber Alliance will now process the survey feedback and will set about determining actions and resources required to address new and viable growth and technological solutions.

*1 2016 Boardroom Business Confidence Index (BBCI) results across eight years

*2 Deloitte release: 17 Oct 2016

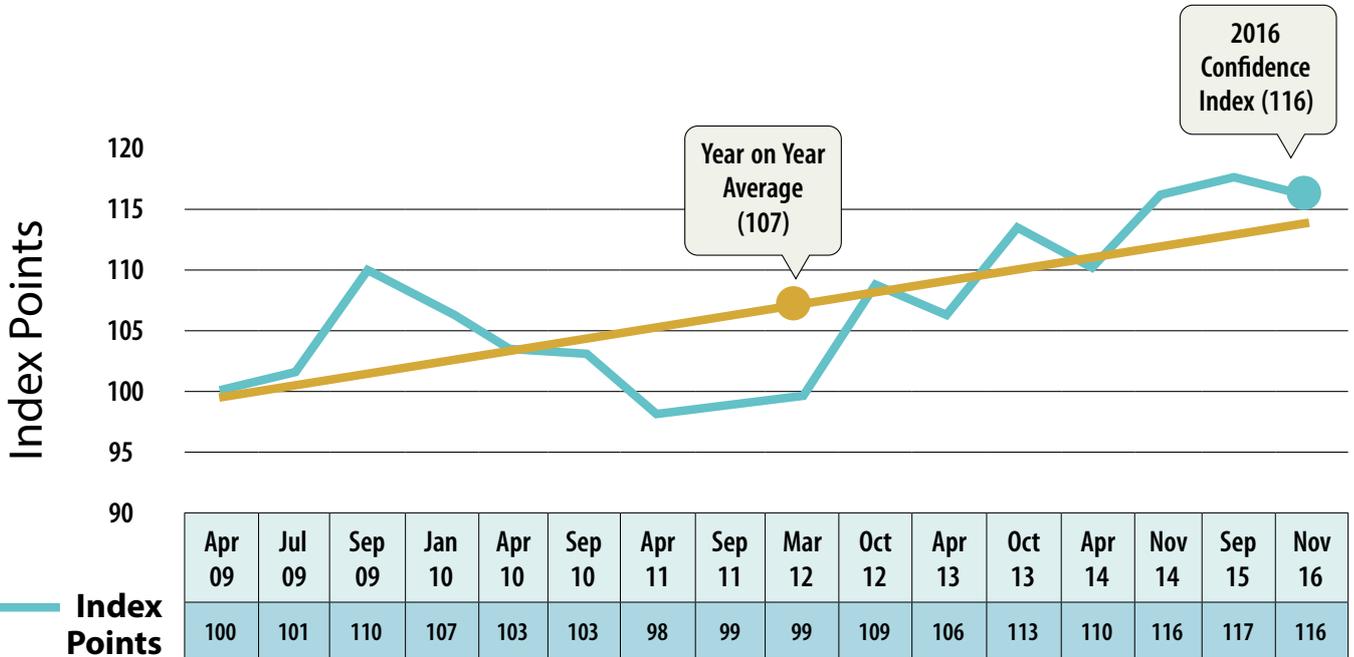
To read economic commentary by Jo Masters of ANZ, please go to [page 10](#).



BOARDROOM BUSINESS CONFIDENCE INDEX

The November 2016 survey is the seventeenth survey in the Sunshine Coast Business Confidence Survey series. Using the data collected since 2009, we have created the Boardroom Business Confidence Index to demonstrate confidence trends over time.

For a full explanation of how this index is calculated, please see our dedicated Sunshine Coast survey web page: www.boardroombusiness.com.au/sunshinecoast



Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)



“The Index reflects a nine percentage point increase (116 points) to the year on year average (8 years) of 107 points. This indicates consistent growth in confidence levels.”

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)

GENERAL BUSINESS CONFIDENCE - PERFORMANCE

How has your business / organisation performed?

	Much Weaker	Somewhat Weaker	About the Same	Somewhat Stronger	Much Stronger
PAST How has your business performed over the LAST 6 months relative to the previous 6 months?	9%	14%	32%	35%	10%
FUTURE How do you believe your business will perform in the NEXT 6 months compared with the last 6 months?	4%	7%	33%	40%	16%

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)

CONFIDENCE INDICATORS

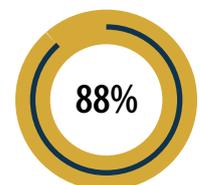
In your business / organisation do you expect an increase, decrease or no change over the next 6 months in the following areas?

Confidence Indicators	Decrease	No Change	Increase
Profitability	12%	40%	48%
Staffing Levels	8%	59%	33%
Capital Investment	10%	57%	33%

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)



90% of survey responders expect the same (or an increased) level of capital investment over the next six months.



88% expected the same (or increased) profitability levels



92% will maintain the same (or increased) staffing levels.

“Business Confidence remains elevated, at similar levels to both 2014 and 2015. A solid 56% of respondents expect “a stronger” business performance in the next 6 months. Encouragingly, 48% of businesses expect an increase in profitability.”

Jo Masters, Senior Economist - ANZ

IMPROVEMENTS TO YOUR BUSINESS

What would make a difference to the profitability or viability of your business?

There were many detailed responses to this question and we thank you for your honest and frank comments.

The responses are anonymous and have been passed onto both Council and the many business and industry groups on the Coast so that they can discuss and address the many issues raised in this question.

Below are some selected comments left for this question:



Infrastructure

Add a rail link to the Sunshine Coast regional area (eg, Warana, Maroochydore). Cut the dole and unnecessary parliamentary expenses so that tax can be reduced, allowing us to afford to put on Australian workers and invest in more business equipment.

Rezone main roads in each suburb to mixed business and residential to stimulate locally owned and operated businesses, improve business resiliency, increase walkability of suburbs and thence decrease obesity levels and the associated health costs.

Completion of the new hangar/business sites at Caloundra Airport.

Direct international flights to Sunny Coast.

High speed internet connection; quality commercial accommodation with good parking facilities.

If affordable high quality broadband Internet was available in the hinterland areas bypassed by NBN.



Marketing

Training of online business technologies, with a practical approach toward time & cost management.

Business customers to realise that technology solutions are here now and they can use to be more productive and more profitable.

Confidence in the businesses within the area, we all need to stay open 6 days a week and do same hours, then the people who come to Buderim can expect to trade in any of the businesses. Saturday is a good example, customers come out after lunch time and children's sports function to shop and half the businesses are closed. I stay till 4pm and do really well after everyone closes.

Increase in tourist / holiday makers to the Sunshine Coast and more particularly to Coolum Beach. We are still far from the pre GFC level, eight years later.

More Lifestyle Expos/events in the upper Sunshine Coast - highlighting MANY businesses who cannot benefit from lower Sunny Coast events.



Other businesses using local business as opposed to looking for cheapest option

Our tech ecosystem is growing on the coast, I think this is a real benefit, just continue the momentum around ICT, R&D and innovation/start ups.



Government / Council

A flexible up to date town plan that reflects current business trends and property usages.

Better access to affordable, stable, fast broadband and for local businesses themselves to be doing a lot better than they are.

Better outcomes from Government agencies, some ability for Council to assess based on better outcomes and not be stuck to rigid platforms. There needs to be more focus on the future of the coast, it seems there is still more looking in the rear view mirror in response to planning outcomes.

Better parking in Maroochydore so clients can meet with me more easily.

If policy and regulation permitted a more free- market approach to land supply in the region.

More consistent and "fast tracked" approval processes.

More open discussions around possible collaborative activities with Council rather than adhering to a tender / brief.

State Government in Qld is the biggest handbrake to our business. They need to rapidly find ways to fund new infrastructure as traffic issues are going to choke our region.

Strong, consistent, assertive, concerted regional leadership.

Sunshine Coast Airport re-development being completed ASAP.



Macro

A more positive outlook in the economy. Reduced penalty rates.

Bringing more major events to the Sunshine Coast so that there is less of a reliance on having fantastic weather for the tourism market. Having teams such as Sunshine Coast Lightning based here on the Sunshine Coast with home games will see fans come and stay. I do not believe that we are taking full advantage of the conference and sporting events market that may be looking for a base for their next function.

Cheaper energy costs.

Confidence of the consumer re permanent full time jobs & stable interest rates.



Training / Staff

Abolish payroll tax.

Availability of workers and better access to the river for our boats.

Award wage rates are utterly uncompetitive with our overseas competitors (mostly North America and UK).

Better access to skilled software developers.

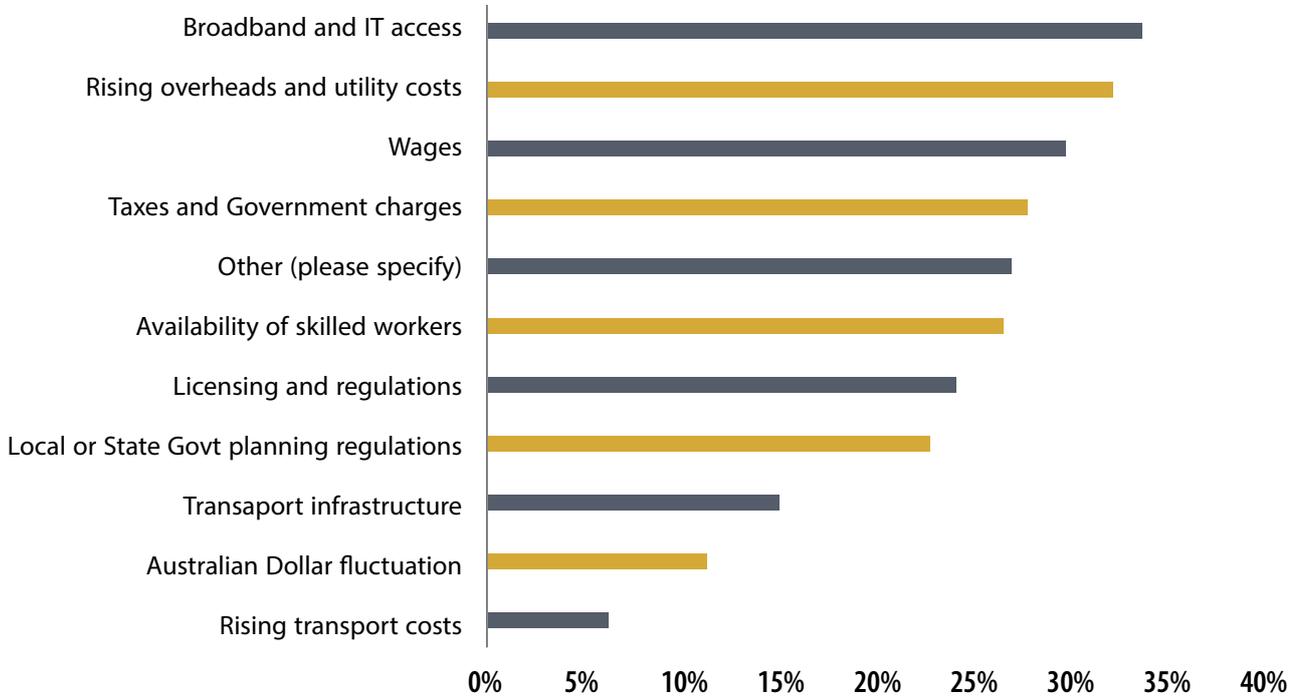
Reduce wages/stop road side traders.



IN YOUR OPINION, WHAT ARE THE MAJOR CONSTRAINTS ON THE GROWTH OF YOUR BUSINESS?

Respondents could choose multiple answers to this question

CONSTRAINTS



Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)



'Other' responses included:

Woolworths/Coles/servos/markets selling same product.



The costs of business development in a new media era.



Overpriced rents. Rents not reflecting levels of retail activity in town.



Long term political neglect of the region due to the lack of marginal seats and indifferent performance of local members.



Lack of affordable housing for workers and staff.



Growing trend for professional firms to outsource and businesses being unaware of this when comparing like with like.



Elections disrupt business, we had 2 elections at the start of this year. Trading was down because of it.



Economic downturn, State and LG Procurement processes, Disjointed Governance.



Competition with the larger chains, "buy local" does not have the impact it deserves.



A lack of local government investment or incentives in companies that heavily promote the Sunshine Coast on overseas business.



Uncertainty arising from the Australian election and now even worse Trumpisation!



BUSINESS CONSTRAINTS

Top 5 Major Business Constraints trending over time

In your opinion, what are the major constraints on the growth of your business?

Below are the top 5 Constraints listed in the past five surveys.

	October 12	April 13	October 13	May 14	Oct 15	Nov 16
1	Price pressure from customers	Rising overheads and utility costs	Rising overheads and utility costs	Rising overheads and utility costs	Rising overheads and utility costs	Broadband and IT Access
2	Rising overheads and utility costs	Price pressure from customers	Price pressure from competitors	Price pressure from customers	Price pressure from competitors	Rising overheads and utility costs
3	Price pressure from competitors	Price pressure from competitors	Price pressure from customers	Taxes and Government charges	Price pressure from customers	Wages
4	Global / national economic performance	Taxes and Government charges	Taxes and Government charges	Wages	Taxes and Government charges	Taxes and Government charges
5	Taxes and Government charges	Wages	Global / national economic performance	Price pressure from competitors	Wages	Availability of skilled workers

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)

Areas of Influence and Responsibilities



Business/Commercial



Federal/State Govt



Broader Economic



Business imperatives, Government policies and economic factors all influence successful growth initiatives. However, business owners may influence the majority of the above constraints and workarounds.

ECONOMIC COMMENTARY

Prepared by Jo Masters, ANZ Senior Economist

The rebalancing of the Australian economy from mining to non-resource industries is well advanced. While the mining sector continues to weigh on economic growth, activity in non-resource industries has grown strongly in recent years.

Encouragingly, the wind down of mining investment is largely behind us; commodity prices – including for coal and oil – have lifted strongly in recent months; and resource export volumes will grow strongly as LNG shipments ramp up. This suggests the drag on economic growth from the end of the mining boom is set to ease in the year ahead.

Economic growth outside of the mining sector – notably in services and housing – continues to strengthen and support overall economic growth, particularly across the eastern states. This, together with improving conditions in the mining sector, should support a lift in Australia's economic growth rate to 2.5% in 2017, from an estimated 2.3% in 2016.

While Queensland has had to contend with the commodity cycle, the Sunshine Coast is not on the front line of the mining sector. Indeed, economic activity on the Sunshine Coast has been supported by tourism and home building.

Housing construction has picked up very sharply in South-East Queensland, with demand underpinned by low interest rates and relative housing affordability. While building approvals growth has slowed recently, the level of building approvals remains high and there is a backlog of work, which will continue to support residential housing construction in coming months (Figure 1).

Tourism remains a bright spot, supported by the lower AUD and strong demand from China. Chinese tourists visiting Queensland has been boosted by increased airline capacity on direct routes and, more broadly, rising incomes in China. Indeed, net tourism and education exports have continued to rise strongly even as the currency has stabilised around US75 cents (Figure 2). Spending by overseas tourists in Queensland has grown by 10% over the past year, although this is somewhat slower than in NSW or Victoria (see Figure 3). In contrast, spending by domestic tourists has been risen faster in Queensland than Victoria or NSW.

While economic activity remains solid on the Sunshine Coast, there does appear to have been some loss of momentum (in line with the broader economy). The unemployment rate has risen to 5.1%, from a recent low of 4.2%, although it remains well below the national average (5¾%) and other areas of Queensland (see Figure 4).

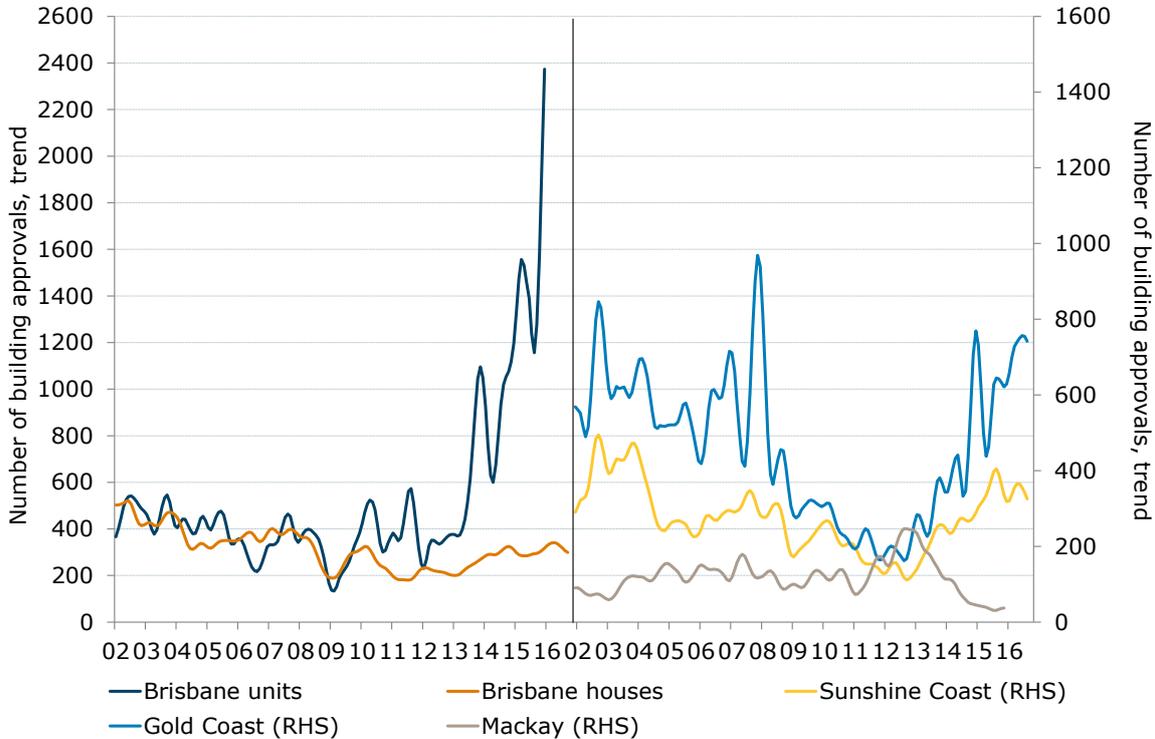
That said, businesses on the Sunshine Coast remain positive about the economic outlook. Indeed, business confidence as measured in the latest Sunshine Coast Business Confidence Survey remains elevated, at similar levels to both 2014 and 2015. A solid 56% of respondents expect "somewhat stronger" or "much stronger" business performance in the next 6 months. Encouragingly, 48% of businesses expect an increase in profitability.

A majority of businesses are expecting 'no change' in staffing levels or capital investment, though, which suggests that business conditions remain challenging. Rising overheads and utility costs, concerns around IT, as well as wages were commonly highlighted in the survey as key constraints on business growth. Interestingly, 27% of firms noted the availability of skilled workers as a constraint, up from 20% in 2015.



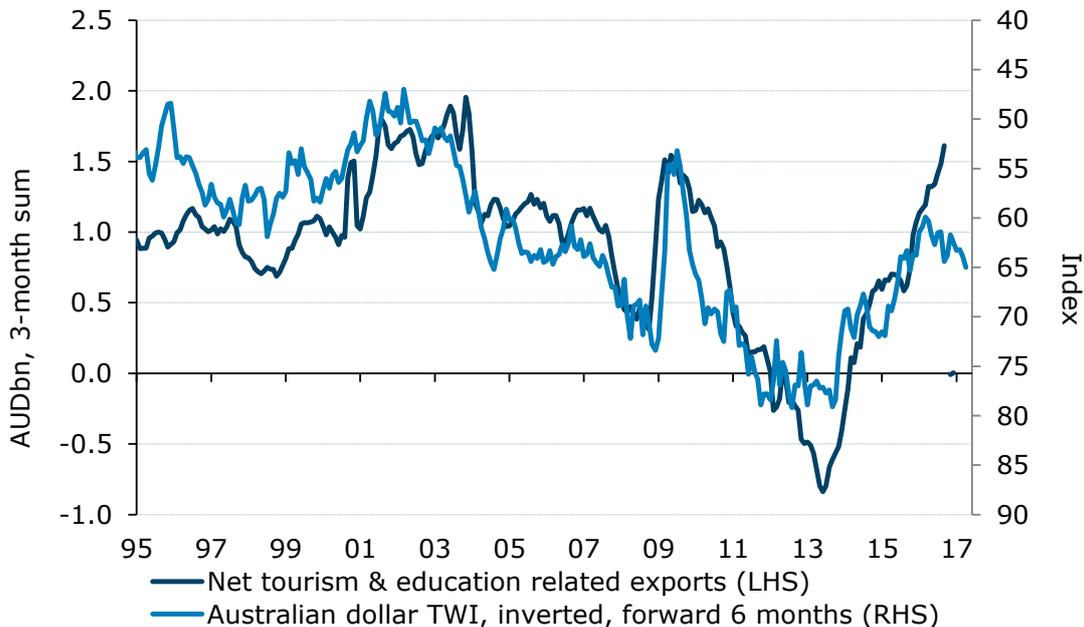
While the Sunshine Coast has experienced stronger economic conditions than much of Queensland, businesses will need to remain proactive in order to expand their business opportunities. Those operating in the tourism sector will face less stimulatory conditions given the recent stabilisation of AUD and ongoing competition from other states. Meanwhile, the housing construction cycle looks to be peaking. There is a backlog of work in the pipeline that will underpin activity in coming months, but activity is likely to weaken beyond that.

Figure 1: Residential building approvals



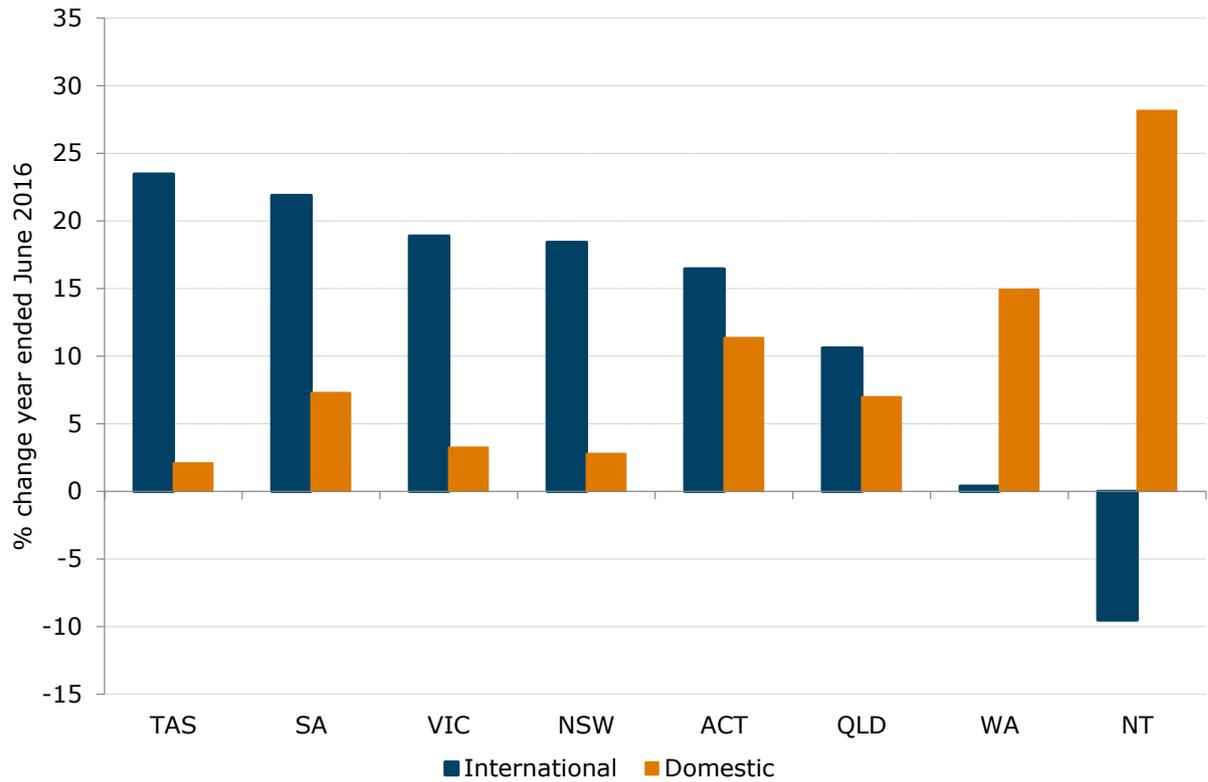
Source: ABS, ANZ Research

Figure 2: Tourism and the AUD



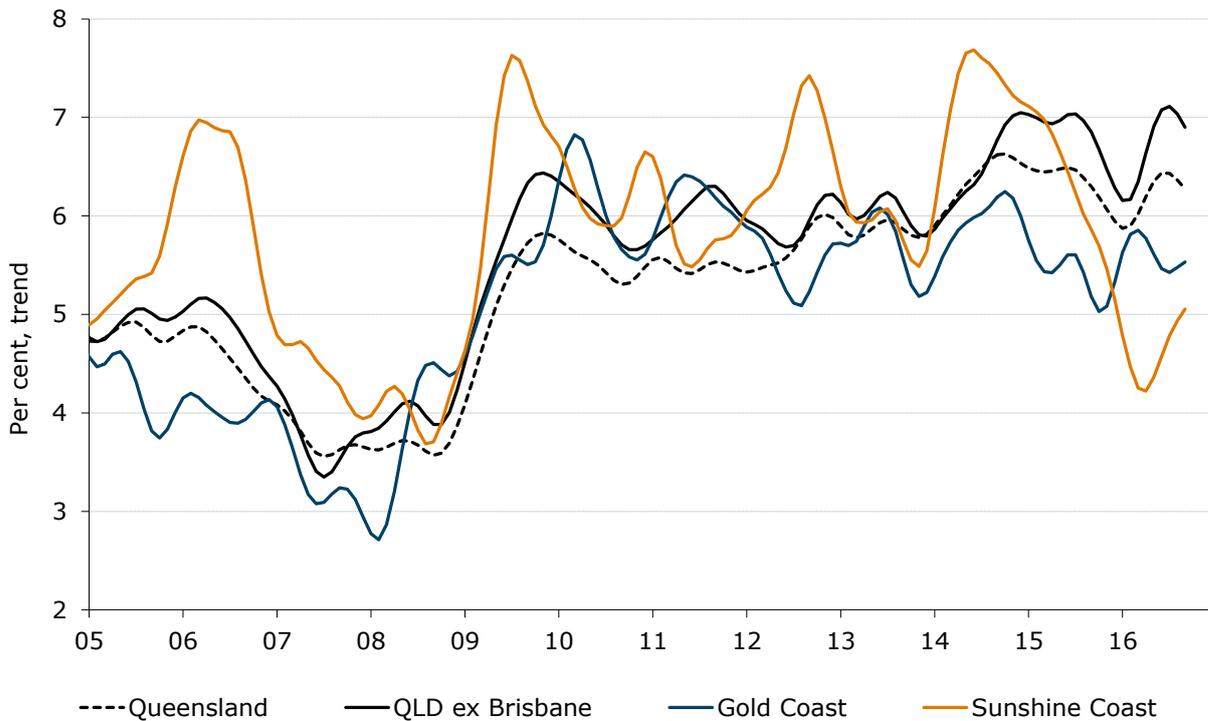
Source: ABS, ANZ Research

Figure 3: Tourism expenditure by state



Source: Tourism Research Australia, ANZ Research

Figure 4: Unemployment rates, Queensland



Source: ABS, ANZ Research

Jo Masters
Senior Economist, ANZ

INDUSTRY SECTORS

Which industry do you belong to?

Using the Australian and New Zealand Standard Industry Classification codes (ANZSIC) for purposes of national comparisons.

For more detailed economic information about the local Sunshine Coast economy please visit:

www.economy.id.com.au/sunshine-coast

Response	%
Property and Business Services	26%
Retail Trade	11%
Communication Services	9%
Accommodation, Cafes and Restaurants	9%
Construction	6%
Education	6%
Manufacturing	6%
Personal and Other Services	6%
Financial and Insurance	5%
Transport and Storage	5%
Cultural and Recreational Services	4%
Health and Community Services	3%
Agriculture, Forestry and Fishing	1%
Government Administration and Defence	1%
Wholesale Trade	1%
Electricity, Gas and Water Supply	<1%
TOTAL	100%

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)

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REGIONAL RESPONSES ACROSS THE COAST

In which region do you primarily operate your business from?

Location	%
Multiple Sunshine Coast Locations	20%
Maroochydore	14%
Other areas in Queensland / National / International	10%
Noosaville	8%
Coolum	6%
Caloundra	6%
Noosa Heads	5%
Buderim	4%
Mooloolaba	4%
Kawana Waters	3%
Eumundi	2%
Sippy Downs	2%
Peregian Beach	2%
Beerwah, Maleny, Montville, Nambour, Alexandra Headland, Cooroy, Doonan, Marcoola, Yandina, Beerburrum, Bli Bli, Cotton Tree, Forest Glen, Glasshouse Mtns, Kunda Park, Palmwoods, Sunrise Beach.	1% or less

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)



FOCUS QUESTIONS

SMART CITY FRAMEWORK

For each survey we have been focusing on a specific topic that is important to the local business community. For this survey we focused on the Smart City Framework.

Have you considered the impact of IoT solutions (including sensors, real time data collection and/or integrated technology solutions) within your own business and its impact upon productivity, customer satisfaction and innovation?

Answer Options	%
Some consideration, however hasn't been a priority.	30%
Not considered it at all, not relevant to my business.	24%
We are actively working on IoT upgrades, systems and culture.	20%
We have implemented a few upgrades but could do more.	18%
We are at the leading edge of IoT upgrades, systems and culture.	4%
Other	4%
TOTAL	100%



72% of participants are either considering or actively working on IoT upgrades, systems and culture.

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)

If you have NOT implemented (or considered implementing) IoT solutions to a level you are satisfied with, why not? Respondents could choose multiple answers.

Answer Options	%
I haven't had the capital budget and/or spare cash flow.	33%
I have implemented IoT solutions to a satisfactory level at this point in time.	23%
I haven't had the time.	22%
I don't have the skills and/or my staff don't have the skills.	20%
I don't know where to start, too many options.	16%



The majority of participants have IoT entry-level challenges that require additional focus.

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)

If you HAVE implemented IoT solutions to a satisfactory level, what are your plans for further implementation, upgrades and/or innovation?

Answer Options	%
I am considering further activity however it won't be in the near future.	29%
I have upgrades and innovation in progress at all times.	26%
I have plans for further activity and am actively working towards implementation.	20%
I have done all I need for my business and have no further plans.	15%
Other	10%
TOTAL	100%

Source: Boardroom Business (2016) Sunshine Coast Business Confidence Survey (Nov 2016)

Sunshine Coast Council is implementing a range of IoT solutions for the region under the Smart City Framework (i.e. smart waste, lighting, parking and signage etc), do you see these benefiting your future business activities and if so, how?

Below are selected responses to this question.

If this keeps council rates in check then yes. I hope this results in more efficient council services accommodating the growing population but with keeping costs in control.

Yes, it holds huge indirect benefits for the accommodation sector. One example is better street signage. If a guest is able to find their way to and around a location easier, they will have a better experience with their holiday from the very start.

Yes, access to data that will allow us to better manage and schedule staffing movements.

Yes - economic savings, "green" views of local government increasing with awareness as well, future being implemented in a modern setting.

The benefit of IoT is the data that can be then used in analytics, for future planning, what if scenarios and decision making.

Improved community resilience during severe weather events.

Anything we can do locally to elevate the digital economy infrastructure will serve this region powerfully. The Coast lacks depth of industry and as such we

need to 'import' as much as we can and one great way to import technology is to harness the power of the digital environment and grow it rapidly here.

Not directly, but I think they will be a catalyst to entice other business activity to the region, enhancing economic growth.

Advancement helps everybody - that's it!

Yes, great opportunity to advocate changes here as well as look to implement in other parts of region.

Yes, these will become more important, if we are trying to attract more start ups and innovation on the coast, we have to act and lead by implementing innovation.

Yes, especially in relation to parking and signage.

Improvements in traffic flow should be able to be achieved with this technology.

It will make the region even more attractive to interstate businesses considering re-locating, as well as visitors/new residents.

SURVEY METHODOLOGY

The survey was designed and executed to capture business responses within the Sunshine Coast region, incorporating the Sunshine Coast Council and Noosa Council boundaries.

The survey opened on 1 November and closed on 2 December 2016. The survey was distributed via email addresses to established business networks.

Conducted online, the survey allowed for anonymous participation and consisted of 12 questions.

Additional questions were added to the survey series to focus on important industry sectors, regions or topics across the Coast. For this survey we chose to focus on ***the Smart City Framework***.

210 businesses responded to the November 2016 survey.

The Sunshine Business Confidence survey series has been conducted since 2009, this is the seventeenth survey. To view any of the previous reports, please see our dedicated website:

www.boardroombusiness.com.au/sunshinecoast

ECONOMIC DEVELOPMENT BRANCH, SUNSHINE COAST COUNCIL

Sunshine Coast Council's Economic Development Branch is committed to building a strong and diverse regional economy.

They offer support to businesses to help them on the path to success.

Having accurate, accessible information can make the difference between the success or failure of your business. The Economic Development Branch have helpful resources about planning, training, licencing as well as market and industry opportunities.

For further formation please visit: www.sunshinecoast.qld.gov.au/Business

“*Tourism remains a bright spot, supported by the lower AUD and strong demand from China. Chinese tourists visiting Queensland has been boosted by increased airline capacity on direct routes and, more broadly, rising incomes in China.*”

Jo Masters, Senior Economist - ANZ

ACKNOWLEDGEMENTS

We wish to thank the many Chambers of Commerce, business and industry groups who encouraged their members to complete this survey. Their contribution is always appreciated.

We also wish to thank the following supporters who assist us with the survey:

Sunshine Coast Council ANZ

Regional Development Australia, Sunshine Coast

Sunshine Coast Chambers of Commerce Alliance

Sunshine Coast Destinations Ltd

Caloundra Chamber of Commerce

Coolumb Business and Tourism

Cooroy Chamber of Commerce

Eumundi Chamber of Commerce

Housing Industry Association Ltd

Kawana Waters Chamber of Commerce

Maleny Commerce

Maroochydore Chamber of Commerce

Mooloolaba Business & Tourism

Nambour Alliance

Noosa Chamber of Commerce

The Original Eumundi Markets

Peregian Beach Business Association

Sunshine Coast Business Women's Network

Sunshine Coast Daily

Sunshine Coast Innovation Centre

Sunshine Coast Institute of TAFE

Tourism Noosa

Urban Development Institute of Australia

Yandina Chamber of Commerce

If you are involved in a business organisation on the Sunshine Coast, and interested in supporting the survey, we would like to hear from you.

CONTACT US:

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www.boardroombusiness.com.au



WANT TO FIND OUT MORE?

If you would like to get involved in our confidence survey you can subscribe online to receive the alerts and be amongst the first to download the results.

You may also like to contribute your comments on our Boardroom Blog and tell us what you think about the survey and/or general business confidence in our region.

Go to www.boardroombusiness.com.au

SUNSHINE COAST BUSINESS CONFIDENCE SURVEY

This report has been produced by Boardroom Business in partnership with the Sunshine Coast Business Community.



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