Survey of businesses report

Commissioned by the Office of the SA Productivity Commission for an inquiry into South Australia's Regulatory Framework

AUGUST 2021 I REF 11907

McGREGOR TAN
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Contents

Slide Title	Slide Number
Purpose, methodology & disclaimer	3
Acronyms	4
Business profile of survey respondents	6
Benefits of SA regulation	7
SA regulators – frequency of interactions	8
Overall rating of SA regulators	9
Business experiences with SA regulation	10
Frequency of difficulties when complying with SA regulation	11
Time consuming factors – Unreasonable cost issues	12
Communication or comprehension challenges – Outdated / inflexible SA regulation factors	13
Duplicate or inconsistent information	14
Interstate trade and comparisons	15
Business ratings of ideas to improve SA regulator interactions	16
Business suggestions to improve SA regulation	17
COVID-19 related regulations	18
Appendix 1: Survey tool	19

Purpose

The purpose of the business survey was to obtain information and data on business experiences and insights for the South Australian Productivity Commission's (SAPC) inquiry into SA's regulatory framework.

This report is based on the final survey results as reported by McGregor Tan.

Methodology

The Office of the SA Productivity Commission (SAPC) engaged McGregor Tan to design, conduct and report on an online survey of businesses operating in SA.

An online survey link was promoted and distributed to businesses operating throughout SA.

The survey generated 376 responses suitable for analysis.

McGregor Tan managed the completion and collation of survey responses and reported on the survey results.

McGregor Tan conducts market research in accordance with ISO 20252.

Disclaimer

Whilst endeavouring to include information and data in this report that is complete and accurate, appropriate consideration and care must be undertaken when interpreting the survey results given:

- inherent factors in survey methodology that can impact on results including timing of the survey, survey respondents self reporting own biases and interpretations etc; and
- information and data provided by respondents does not necessarily reflect the perspectives of all businesses and/or complete industries in SA.

Any and all damages, loss, expenses or costs caused directly or indirectly from reliance on the information or data in this report are disclaimed.

Acronyms

AGD	Attorney General's Department
DEM	Department for Energy and Mining
DEW	Department for Environment and Water
DHW	Department for Health and Wellbeing
DIS	Department for Innovation and Skills
DIT	Department for Infrastructure and Transport
DTF	Department of Treasury and Finance
EPA	Environment Protection Authority
ESCOSA	Essential Services Commission of South Australia
PIRSA	Department of Primary Industries and Regions
SA	South Australia

Survey results

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Business profile of survey respondents

Of those businesses that responded to the survey:

- 87% identify as a small to medium business;*
- over half of the respondents have been in operation for over 10 years (55%);
- prior to the COVID-19 pandemic, over half of respondents (53%) reported that their business had an average annual turnover of up to $2 million;
- 76% indicated that their role in the business is as a middle manager or above (including business owner); and
- 17% are not-for-profit businesses.

Figure 1: Number of business employees

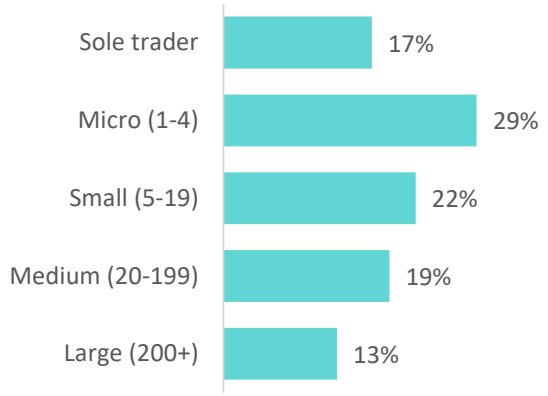


Figure 2: Average annual turnover pre-COVID 19

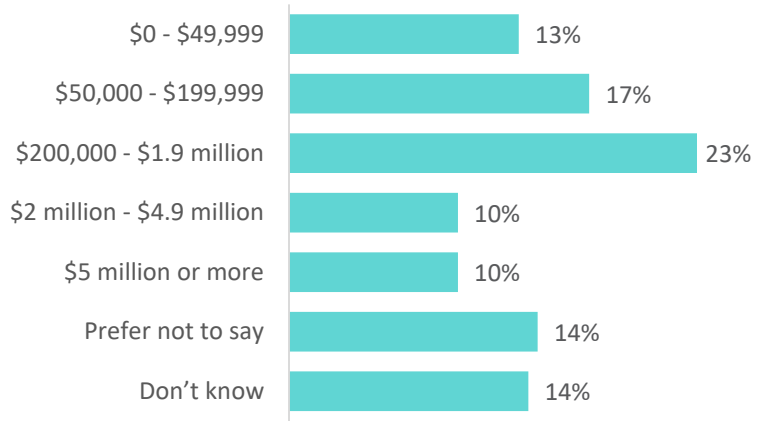


Figure 3: Number of years of operation of business

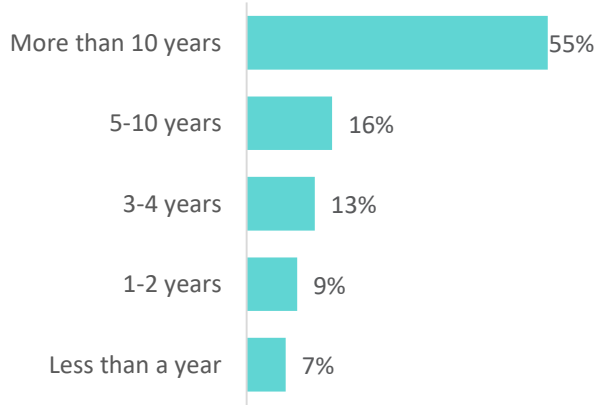
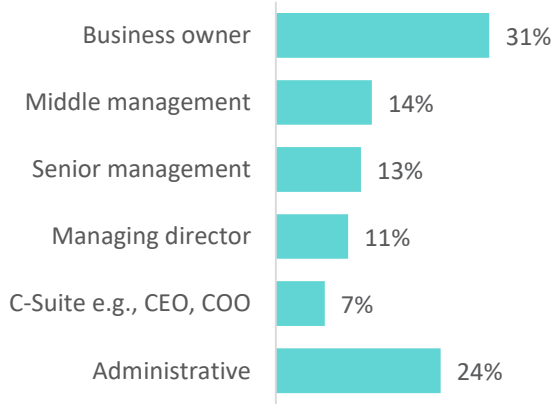


Figure 4: Respondent's role in the business



* Based on ABS definition of a small to medium enterprise (SME)

Benefits of SA regulation

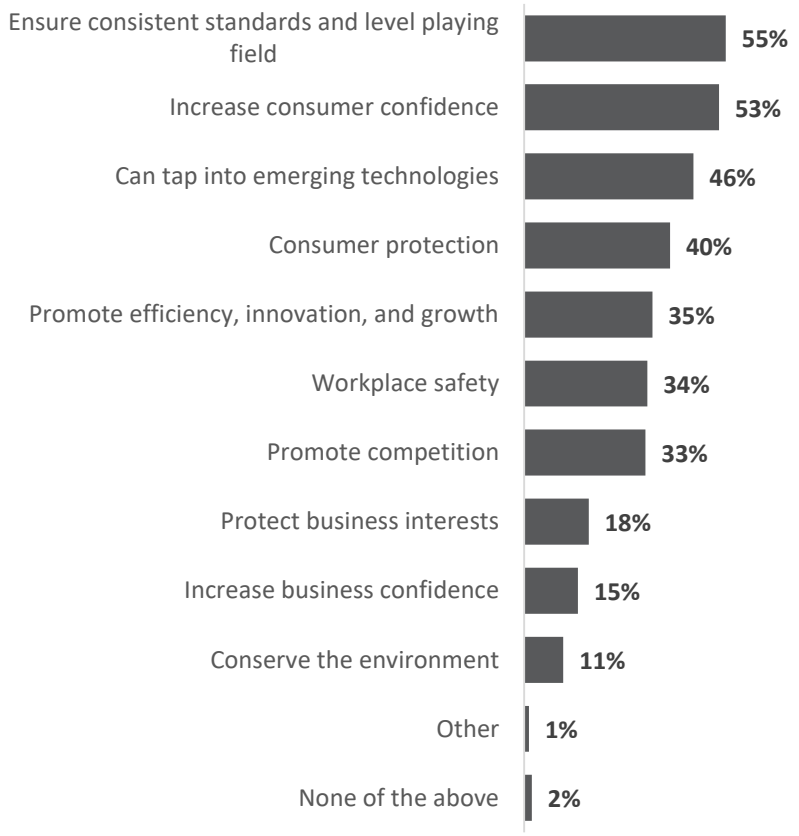
Businesses were asked what they consider to be the benefits of SA regulation. Respondents could choose more than one ‘benefit’ from a list provided.

The responses indicate that businesses perceive ensuring consistency of standards and increasing consumer confidence as the key benefits of SA regulation.

Protecting business interests, increasing business confidence and conserving the environment were much less likely to be selected as a benefit of regulation

Larger businesses (200+ employees) were more likely to indicate tapping into emerging technologies and promoting competition as benefits.

Figure 5: Benefits of SA regulation



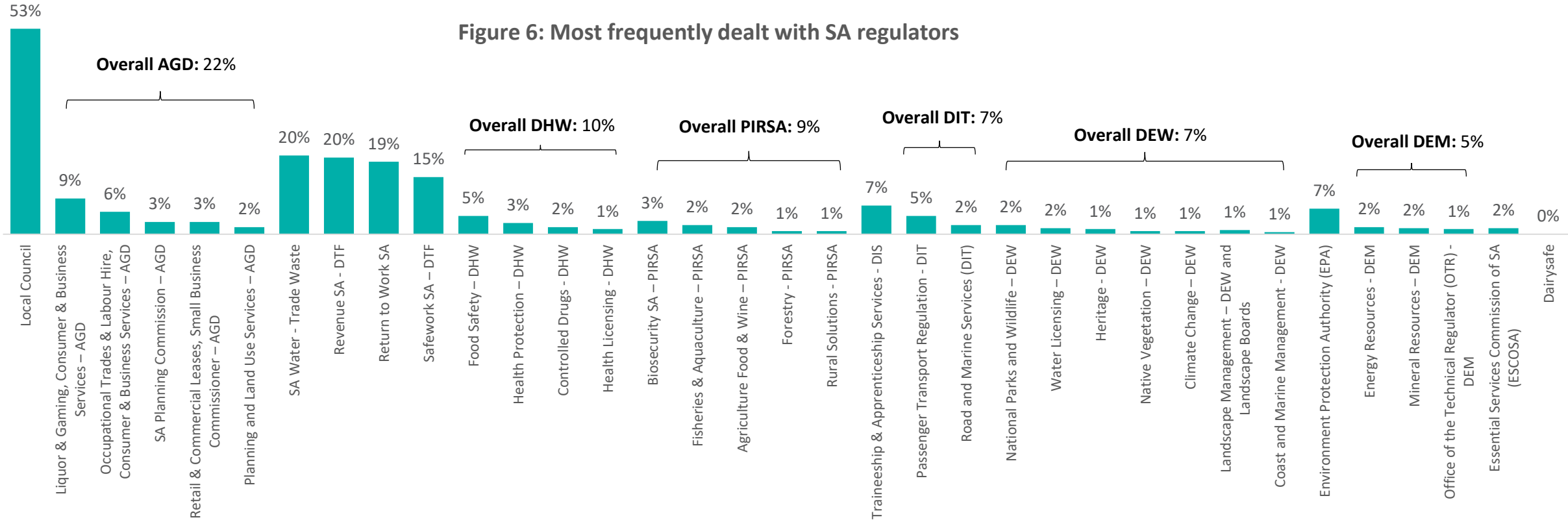
Q4. What do you consider to be the greatest benefits of South Australian regulations? Base: All respondents (n=376).

SA regulators – frequency of interactions

The survey asked businesses to identify the 3 SA regulators with whom they had most frequently dealt over the past three years. According to the results:

- local councils were identified as the SA regulator with whom businesses had dealt most frequently;
- AGD (incorporating various regulatory entities) was the next most frequently dealt with (22%); and
- the SA regulators with whom the survey respondents had the least frequent dealings were ESCOSA and Dairysafe.

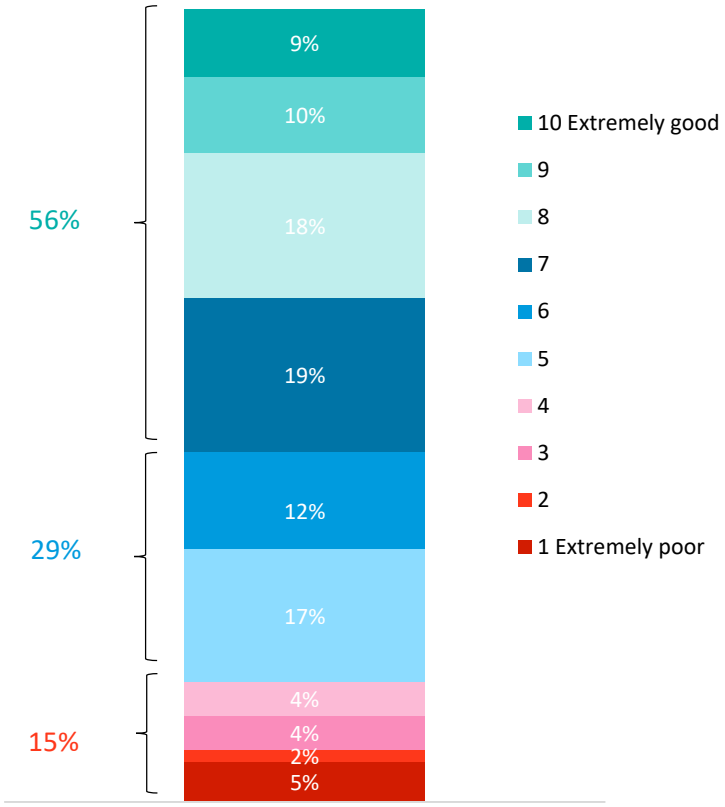
Figure 6: Most frequently dealt with SA regulators



Q17. Which THREE SA regulators do you deal with most frequently? Multiple response. Base: All respondents (n=376)

Overall rating of SA regulators

Figure 7: Overall rating of regulators by business respondents



The average rating given by business survey respondents to the regulators they've dealt with over the past three years was **6.5** out of 10 with:

- 56% of business respondents gave regulators a good to extremely good rating;
- 29% of business respondents gave regulators a neutral rating; and
- 15% of business respondents gave regulators a poor to extremely poor rating.

Additionally, the survey results show that:

- larger businesses (with 200+ employees) tended to provided slightly higher ratings (average 7.3); and
- business owners were more likely to indicate a lower overall rating (average 5.8) compared to respondents that have other roles within the business.

Q14. On a scale of 1-10 where 1 is extremely poor and 10 is extremely good, how would you rate all the SA regulators with which you or your business has dealt with over the last 3 years, overall? Base: All respondents (n=376).

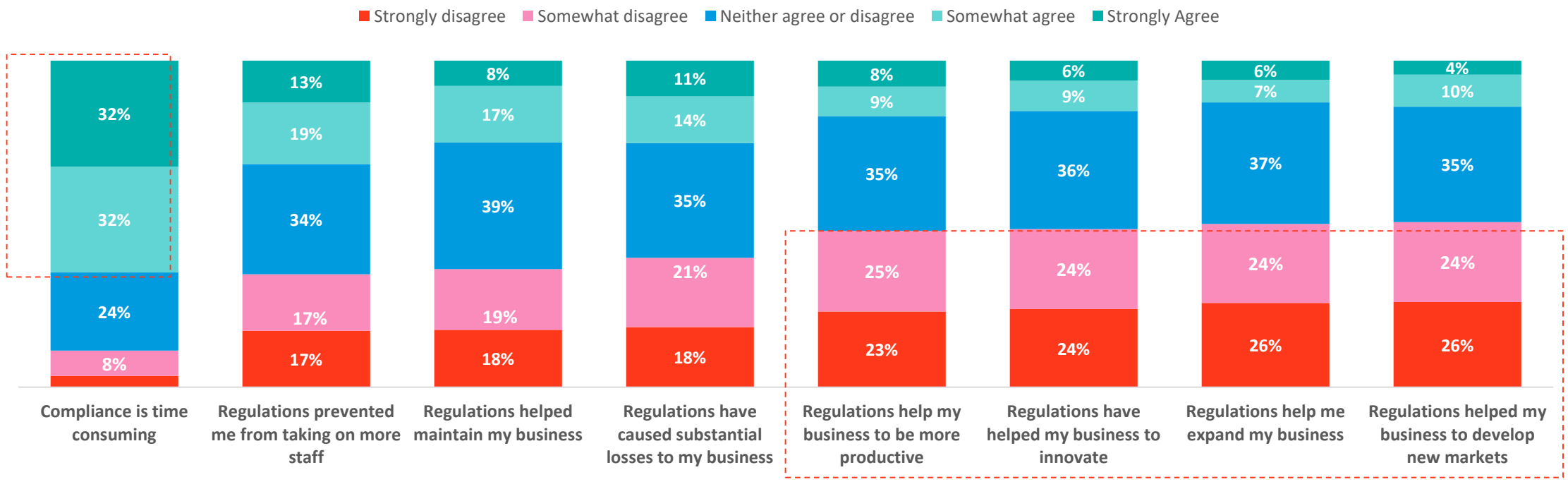
Business experiences with SA regulation

Survey participants were asked to rate a list of statements about complying with SA regulations based on their experiences.

The responses indicate that:

- 64% somewhat or strongly agree that compliance with regulation is time consuming; and
- nearly half of businesses surveyed somewhat, or strongly disagree that regulation helps their business be more productive (48%), innovative (48%), expand (50%), or develop new markets (50%).

Figure 8: Level of agreement with statements on SA regulations



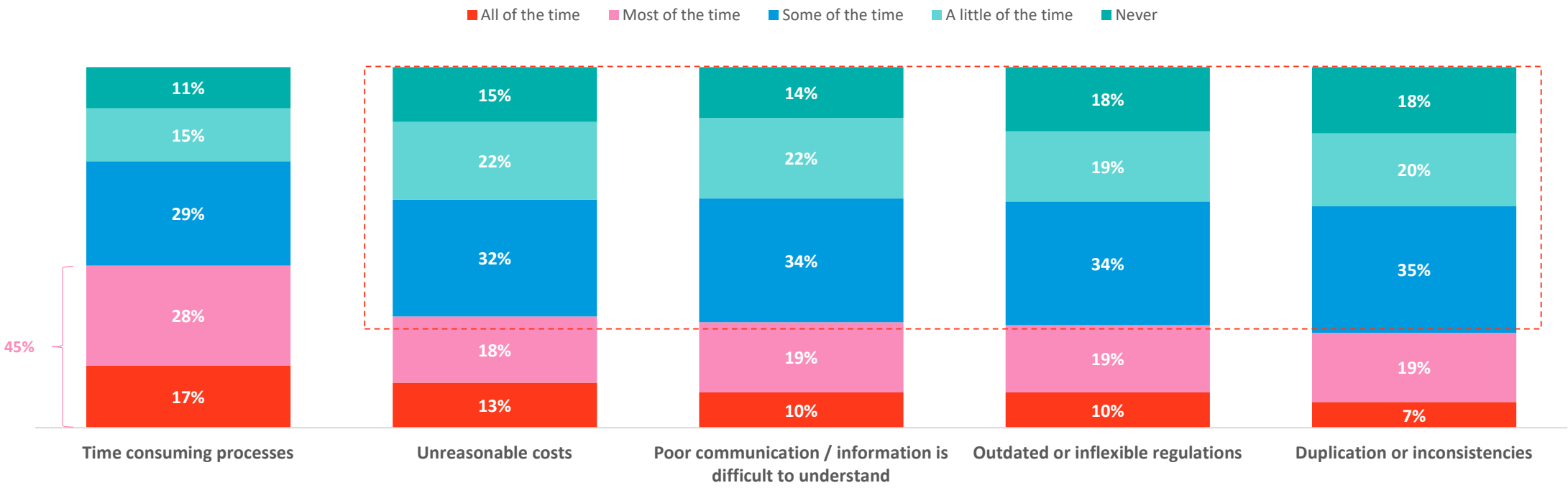
Q13. To what extent do you agree or disagree with each of the following statements about SA regulations in general, based on your experience over the last three years? Base: All respondents (n=376).

Frequency of difficulties when complying with SA regulation

Business respondents were asked to indicate how often they would experience certain specific challenges when complying with SA regulations. The results show:

- 45% of business respondents indicated they experience difficulties due to time consuming processes most or all of the time; and
- over two thirds of business respondents indicated that unreasonable costs, poor communication / difficult to understand information, outdated or inflexible regulations, and duplication / inconsistencies are experienced never, or a little, or some of the time.

Figure 9: Frequency of difficulties when complying with SA regulations

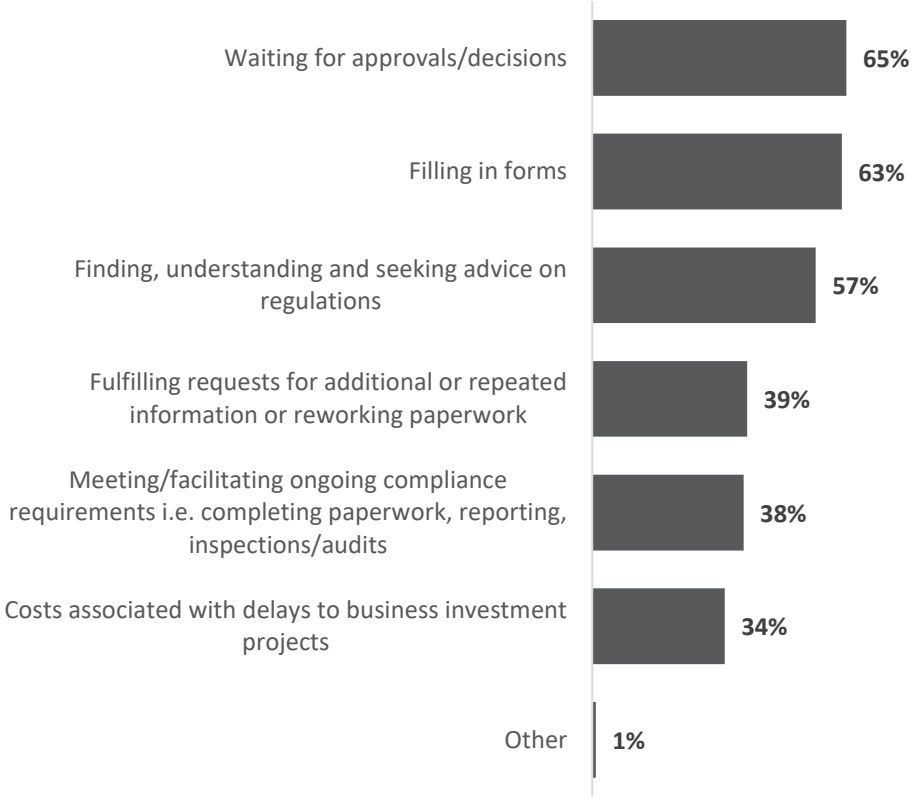


Q5. How often (if at all) does you/ your business experience the following difficulties when complying with South Australian regulations? Base: All respondents (n=376).

Time consuming factors

For business respondents that frequently experience time consuming processes when complying with SA regulations, waiting for approvals or decisions (by government) and filling in forms are key contributing factors.

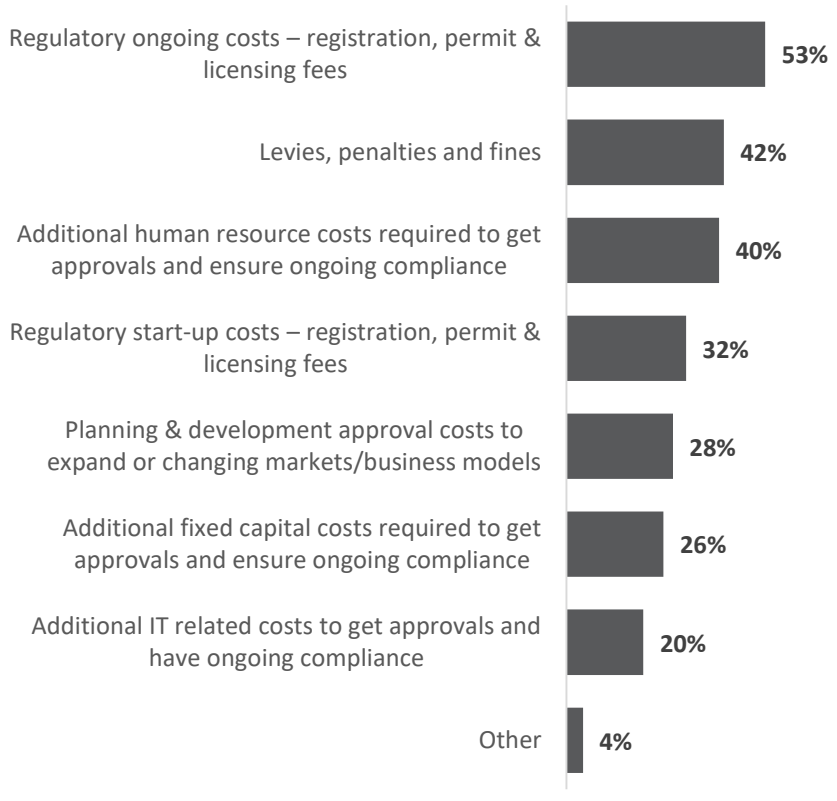
Figure 10: Factors influencing time consuming processes



Unreasonable cost issues

Business respondents that frequently experience unreasonable compliance costs associated with SA regulations identified regulatory ongoing costs like registration, permit and licensing fees as the main issue.

Figure 11: Factors influence unreasonable costs



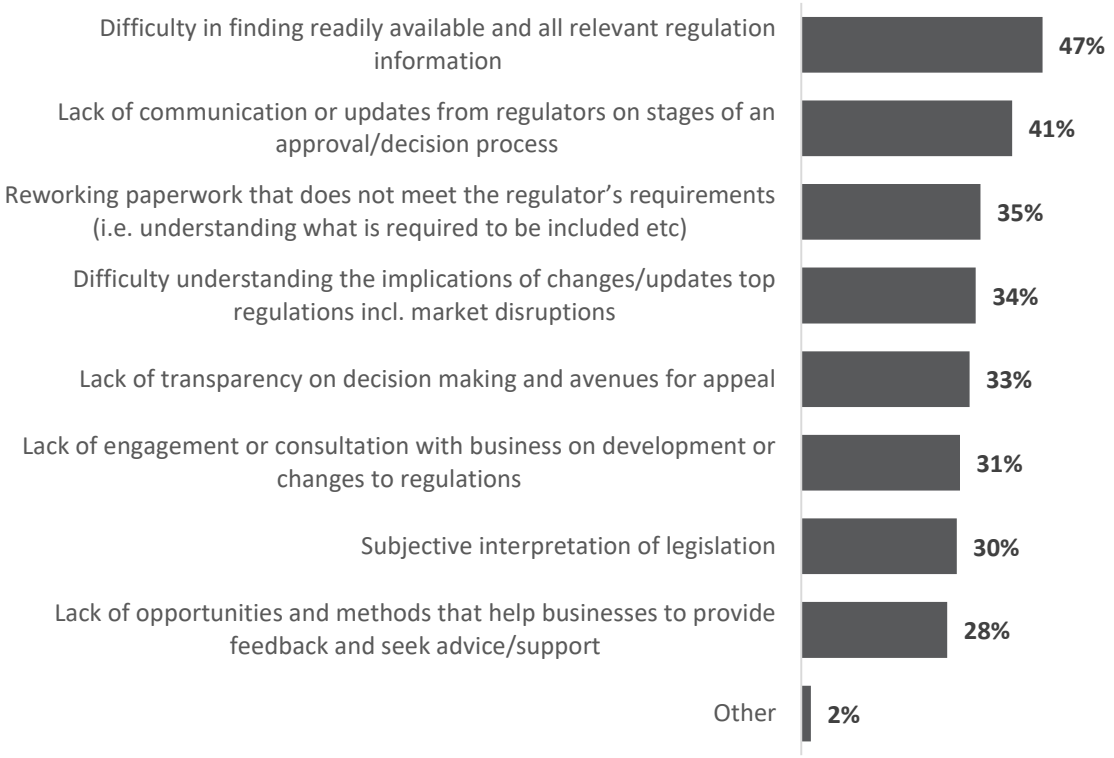
Q5a. Which of the following factors do you find to be time-consuming when complying with SA regulations? Base: Experience this difficulty (n=333).

Q5b. What are the unreasonable fixed/ongoing costs you / your business experiences when complying with regulations in SA? Base: Experience this difficulty (n=319).

Communication or comprehension challenges

The main challenges when communicating with SA regulators are considered to be finding the relevant information and being updated on the approvals / decision process.

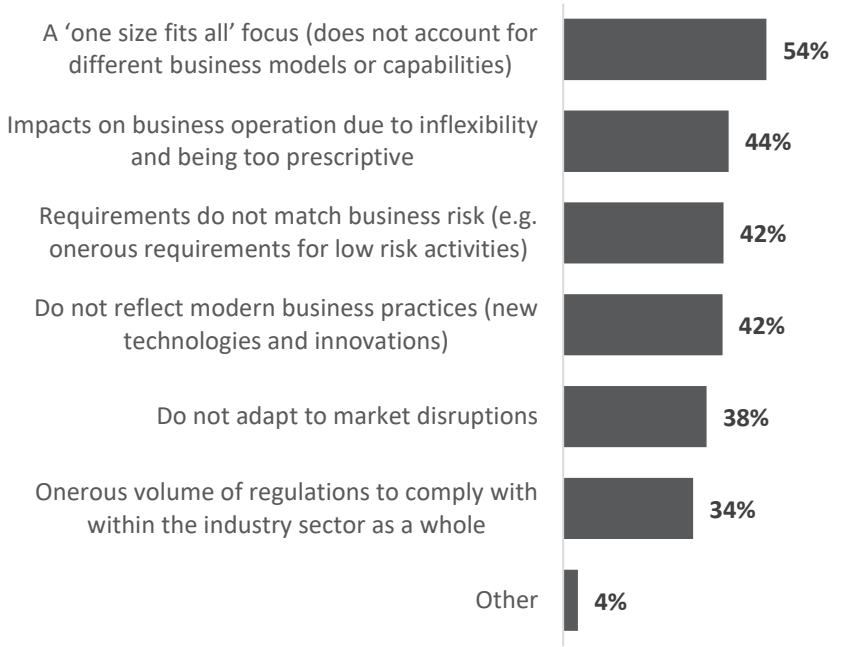
Figure 12: Challenges impacting on communication with SA regulators



Outdated / inflexible SA regulation factors

Businesses consider the most influential factors contributing to outdated or inflexible SA regulations, are the application of regulatory obligations that do not account for different business models and/or capabilities and are inflexible and prescriptive.

Figure 13: Factors contributing to outdated or inflexible SA regulations



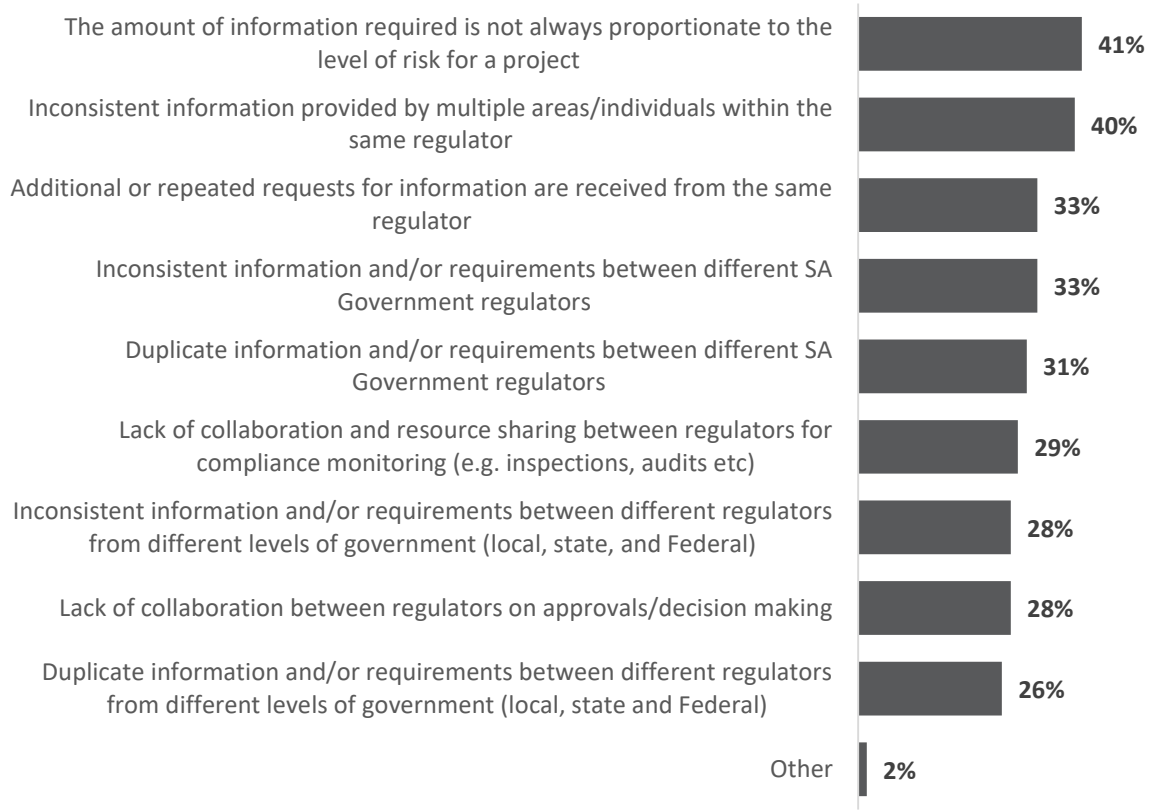
Q5d. What problems are there with SA regulators' communication or comprehension? Base: Experience this difficulty (n=323).

Q5e. What aspects of SA regulations are outdated or inflexible? Base: Experience this difficulty (n=309).

Duplicate or inconsistent information

Disproportionate information requirements that do not account for risk, and inconsistent information that is provided by different parties within a regulator are considered to be the main issues when dealing with duplicate or inconsistent information.

Figure 14: Factors that contribute to inconsistent or duplicate information from SA regulators



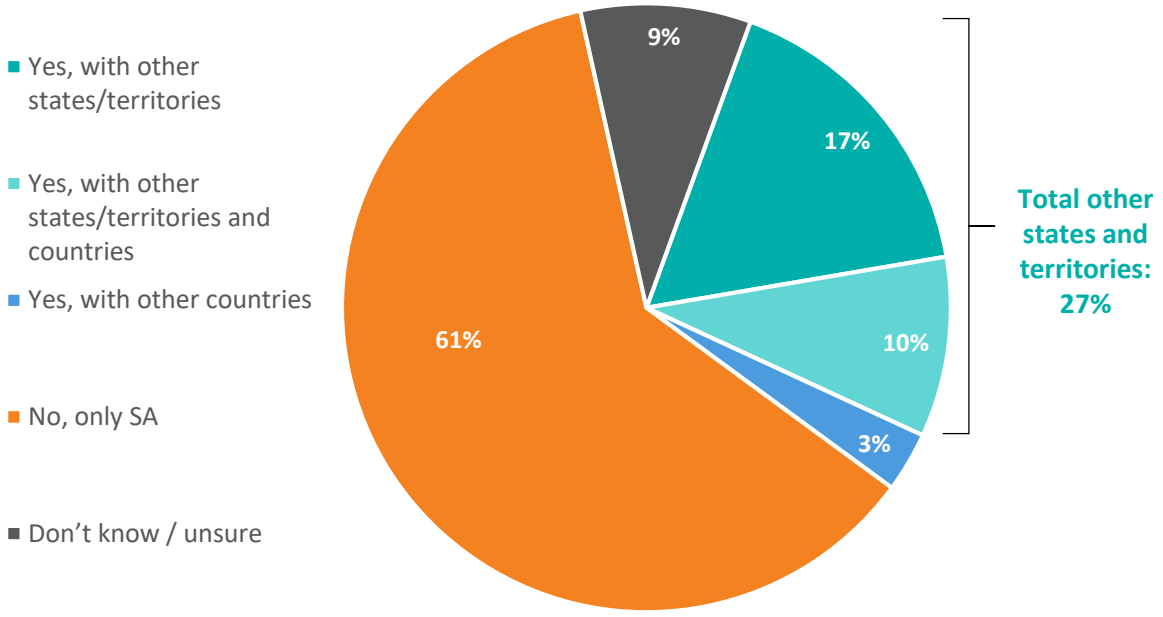
Q5c. How is the information from SA regulators duplicated or inconsistent? Base: Experience this difficulty (n=307).

Interstate trade and comparisons

30% of business respondents trade interstate and/or overseas. Of those businesses that trade interstate:

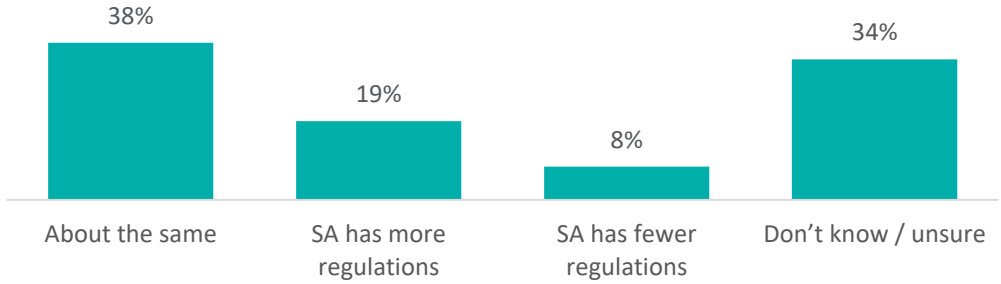
- nearly half (46%) consider that SA has less or the same number of regulations as interstate jurisdictions; and
- 55% consider that the ease of compliance with SA regulations is equivalent or easier than complying with regulation interstate.

Figure 15: SA business respondents that trade interstate / overseas

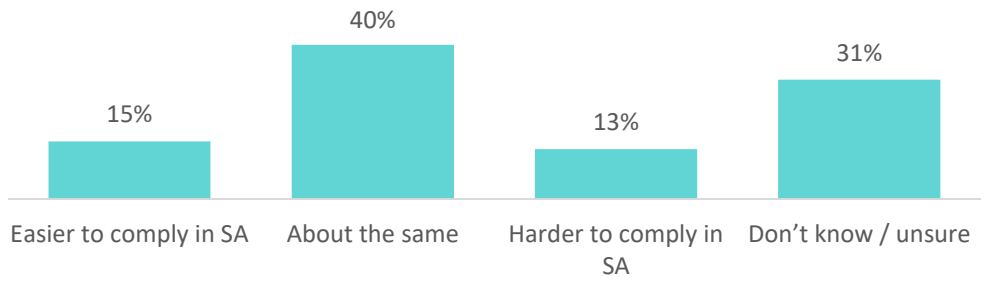


Figures 15a & b: Of those businesses that do trade in other states and territories:

15a: Number of SA regulations compared to other Australian states / territories



15b: Ease of compliance with SA regulations compared to other Australian states / territories



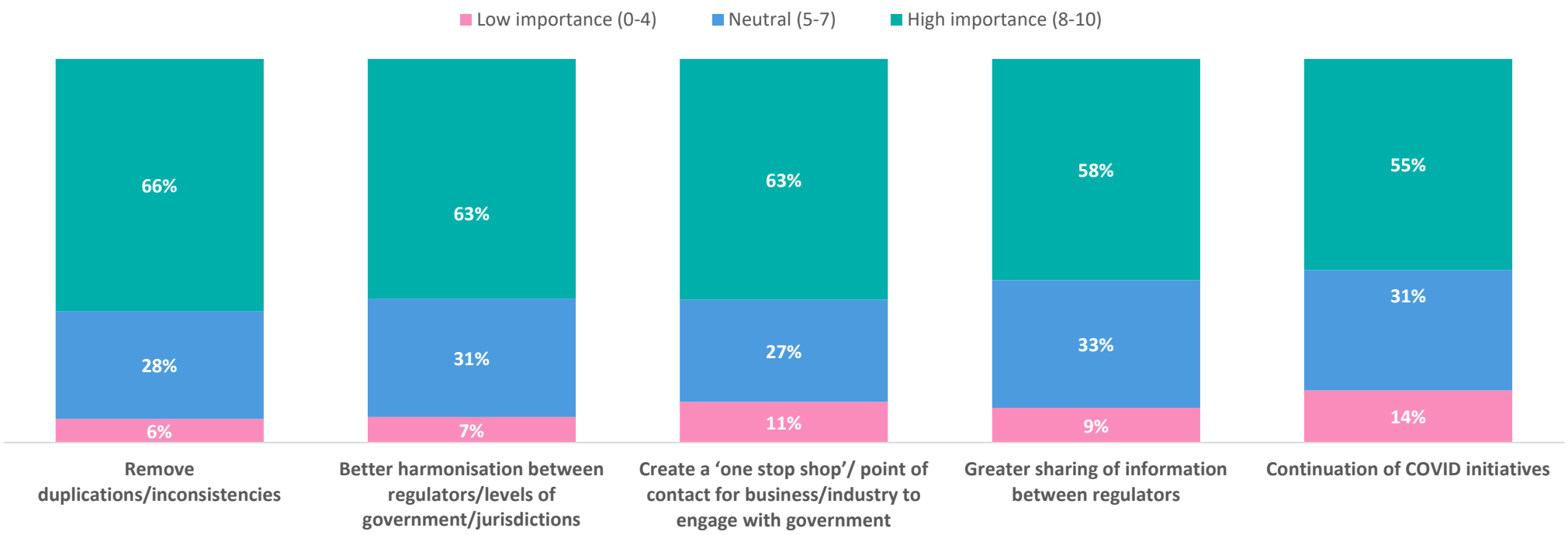
Q8. Does your business trade in other states/territories/countries? Base: All respondents (n=376).
Q9. How does the number of SA regulations compare with those of other states? Base: Trade in other states (n=99).
Q10. How much easier or harder do you think it is to comply with SA regulations compared to with those of other states? Base: Trade in other states (n=99).

Business ratings of ideas to improve SA regulator interactions

Over half of all respondents considered that all the listed improvements are of high importance for their business.

Removal of duplication and inconsistency was identified as the reform that received the highest average score (8.0) and the largest proportion of businesses identifying it as of high importance (66%).

Figure 16: Level of importance of specific reforms as rated by business respondents

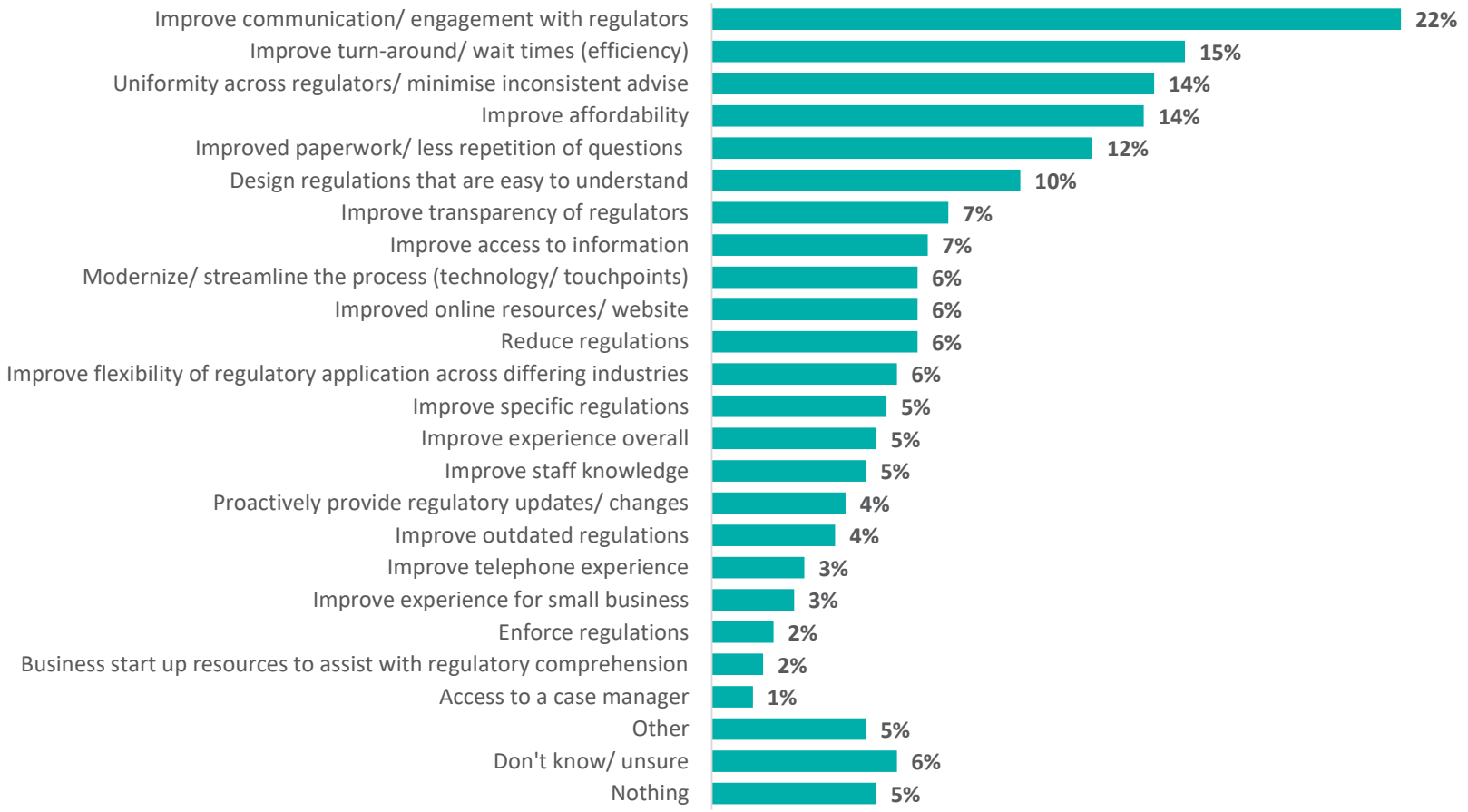


Q25 On a scale of 1-10 where 1=not at all important and 10=very important, how important is it to your business that the following changes are made when interacting with SA regulators? Base: All respondents (n=376).

Business suggestions to improve SA regulation

Businesses were asked to propose up to three suggestions to improve SA regulations. The most popular suggestion by a clear margin is to is to improve communication and engagement with regulators.

Figure 17: Business respondent suggestions to improve SA regulations*



Q6 What changes and improvements would you like to see to SA regulations? Base: All respondents (n=310) Optional to answer.
* Responses categorized by McGregor Tan.

COVID-19 related regulations

17% of business respondents indicated they would like certain COVID related regulations (amended or introduced due to COVID) to continue.

The COVID related regulations that most would like to see continued were those that changed compliance obligations and those that provided business support / grants.

Figure 18: Continuation of certain regulations that were introduced or changed due to COVID – business respondents views

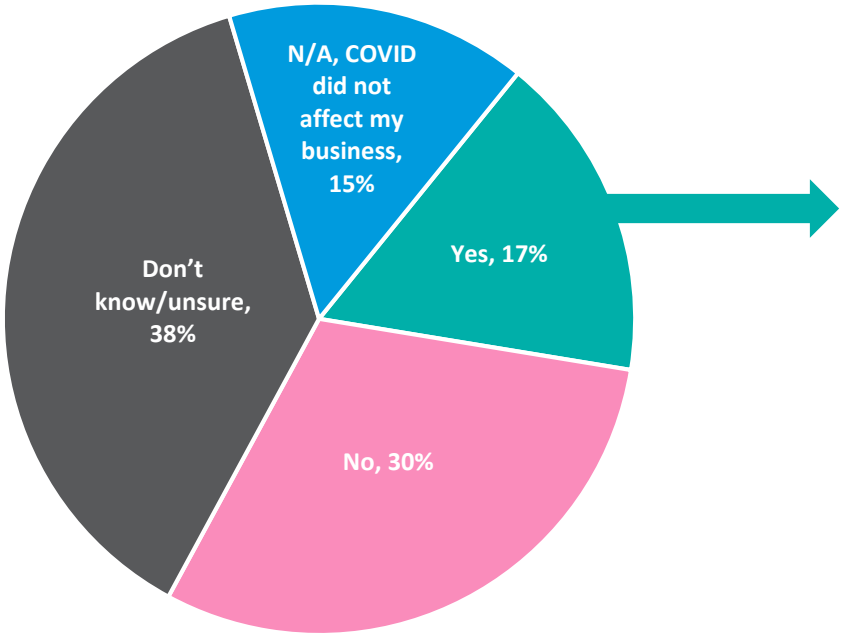
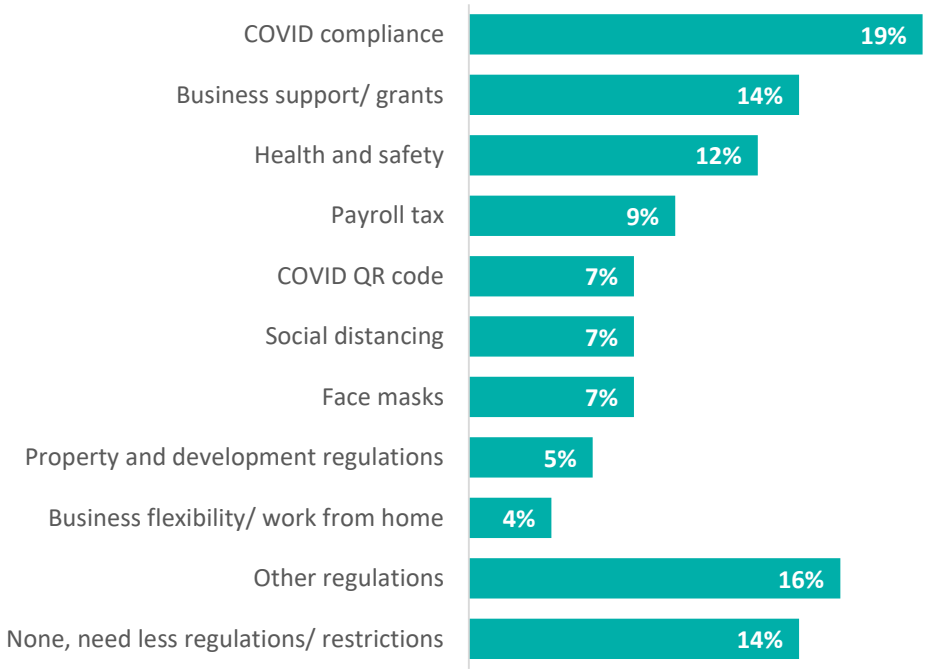


Figure 18a: Which COVID regulations should be continued (those businesses that answered 'yes')



Q28. Were any regulations introduced or changed in SA during COVID that you would like to see continue? Base: All respondents (n=376).
Q29. Please describe which new or amended SA regulations you would like to see continue. Base: All respondents (n=57).

Appendix 1: Survey Tool (questionnaire)

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Project No: 11907

SAPC - SA REGULATORY FRAMEWORK
COMMERCIAL IN CONFIDENCE

Sample: n=1000			Business owners and employees who interact with SA regulators
Online methodology			
Approximate length of survey 15-20 minutes depending on answers			
Total questions: 36	1 screener	9 demographics	31 client questions

Introduction

Welcome to the South Australian Productivity Commission's survey of businesses.
The survey is part of the SA Productivity Commission's inquiry into reforming South Australian regulations.

The survey aims to find out what businesses think of regulations and what needs to be improved. There are no right or wrong answers.
Your responses will help the Commission develop and deliver independent recommendations to the SA Government.

The survey and inquiry focuses on regulations made and applied by the SA Government - not Commonwealth Government regulation.
Participation in the survey is voluntary. McGregor Tan is an independent social and market research company
and complies with the Privacy Act. All information given will remain
anonymous. If you choose to provide your details in the survey, they will only be used for research purposes.
McGregor Tan does not sell, promote, or endorse any product or service.

Screener

S1 - Do you live in South Australia

Yes	1
No	2

Part 1 –Business details

Q1 – Ask all: Do you have any responsibility for dealing with SA regulators or ensuring your business complies with the appropriate SA regulations? Select one

Sole responsibility	1	Continue
Major responsibility	2	
Some responsibility, but limited	3	
No responsibility	4	Terminate

Q2 – Ask all: What is your role in the business? Select one

C-Suite e.g., CEO, COO	1
Managing director	2
Senior management	3
Middle management	4
Business owner	5
Other	6

Q3 – Ask All: How long have you been in this role? Select one

Less than 6 months	1
6 months to 11 months	2
1 to 2 years	3
3 to 5 years	4
More than 5 years	5

Part 2 RegulatorsQ16 – Ask all: Which of the following SA regulators has your business engaged over the last three years? Select all that apply

Essential Services Commission of SA (ESCOSA)	1
Environment Protection Authority (EPA)	2
SA Water - Trade Waste	3
Return to Work SA	4
Dairysafe	5
Planning and Land Use Services (PLUS) – AGD	6
SA Planning Commission – AGD	7
Liquor & Gaming, Consumer & Business Services (CBS) – AGD	8
Occupational Trades & Labour Hire, Consumer & Business Services (CBS) – AGD	9
Retail & Commercial Leases, Small Business Commissioner (OSBC) – AGD	10
Road and Marine Services (DIT)	11
Passenger Transport Regulation - DIT	12
Biosecurity SA – PIRSA	13
Fisheries & Aquaculture – PIRSA	14
Agriculture Food & Wine – PIRSA	15
Forestry - PIRSA	16
Rural Solutions - PIRSA	17
Mineral Resources – DEM	18
Energy Resources - DEM	19
Office of the Technical Regulator (OTR) - DEM	20
Traineeship & Apprenticeship Services - DIS	21

Health Protection – DHW	22
Health Licensing - DHW	23
Food Safety – DHW	24
Controlled Drugs - DHW	25
Safework SA – DTF	26
Revenue SA - DTF	27
Water Licensing – DEW	28
Native Vegetation – DEW	29
National Parks and Wildlife – DEW	30
Landscape Management – DEW and Landscape Boards	31
Climate Change – DEW	32
Coast and Marine Management - DEW	33
Heritage - DEW	34
Local Council	35

Q17 – (Show options selected in Q16 if more than 3) Which THREE SA regulators do you deal with most frequently? Select up to three

Essential Services Commission of SA (ESCOSA)	1
Environment Protection Authority (EPA)	2
SA Water - Trade Waste	3
Return to Work SA	4
Dairysafe	5
Planning and Land Use Services (PLUS) – AGD	6
SA Planning Commission – AGD	7
Liquor & Gaming, Consumer & Business Services (CBS) – AGD	8
Occupational Trades & Labour Hire, Consumer & Business Services (CBS) – AGD	9
Retail & Commercial Leases, Small Business Commissioner (OSBC) – AGD	10
Road and Marine Services (DIT)	11
Passenger Transport Regulation - DIT	12
Biosecurity SA – PIRSA	13
Fisheries & Aquaculture – PIRSA	14

Agriculture Food & Wine – PIRSA	15
Forestry - PIRSA	16
Rural Solutions - PIRSA	17
Mineral Resources – DEM	18
Energy Resources - DEM	19
Office of the Technical Regulator (OTR) - DEM	20
Traineeship & Apprenticeship Services - DIS	21
Health Protection – DHW	22
Health Licensing - DHW	23
Food Safety – DHW	24
Controlled Drugs - DHW	25
Safework SA – DTF	26
Revenue SA - DTF	27
Water Licensing – DEW	28
Native Vegetation – DEW	29
National Parks and Wildlife – DEW	30
Landscape Management – DEW and Landscape Boards	31
Climate Change – DEW	32
Coast and Marine Management - DEW	33
Heritage - DEW	34
Local Council	35

Q18 – (Show options selected in Q17 OR show options selected in Q16 if number of options is 3 or less) On a scale of 1 to 10 where 1=extremely dissatisfied and 10=extremely satisfied, how satisfied are you with the overall performance of the following SA regulators? Select one option per line

	1 – Extremely dissatisfied					➔				10 – Extremely satisfied
Regulator 1	1	2	3	4	5	6	7	8	9	10
Regulator 2	1	2	3	4	5	6	7	8	9	10
Regulator 3	1	2	3	4	5	6	7	8	9	10

Q19 – (Show options selected Codes 1-4 in Q18) What challenges have you had with these SA regulators over the last three years? Select all that apply

	Regulator 1	Regulator 2	Regulator 3
Long approval delays	1	1	1
Incorrect advice provided	2	2	2
Inconsistent advice provided	3	3	3
Require same information as other regulators	4	4	4
Expensive fees	5	5	5
Providing required details is very time consuming	6	6	6
Compliance of competitors not enforced	7	7	7
Insufficient or unclear information about how to apply	8	8	8
Insufficient or unclear information about how to maintain license/registration/compliance	9	9	9
Other – Specify	10	10	10
No issues	11	11	11

Q20 – (Show options selected in Q17 OR options selected in Q16 if number of options is 3 or less) How often do each of these SA regulators engage with you? Select one option per column)

	Regulator 1	Regulator 2	Regulator 3
Weekly or more often	1	1	1
Once or twice per month	2	2	2
Quarterly	3	3	3
Annually	4	4	4

Every two - five years	5	5	5
Don’t know/unsure	6	6	6

Q21 – (Show options selected in Q17 OR options selected in Q16 if number of options is 3 or less) How could engagement be improved for each SA regulator? Select all that apply

	Regulator 1	Regulator 2	Regulator 3
Needs to be more frequent	1	1	1
Needs to be less frequent	2	2	2
More online communication/ reporting/applications/renewals	3	3	3
Less online communication/ reporting/applications/renewals	4	4	4
Regulators need to visit business in person	5	5	5
Need to be able to visit regulators in person	6	6	6
Needs to have a clear purpose	7	7	7
Needs to be more productive	8	8	8
Need to provide feedback on results of engagement	9	9	9
Don’t know/unsure	10	10	10
N/A, does not require improvement	11	11	11

Q22 – (Show options selected in Q17 OR options selected in Q16 if number of options is 3 or less) Ask all: At what stages do the following SA regulators engage with your business? Select all that apply

	Regulator 1	Regulator 2	Regulator 3
Business start-up or expansion	1	1	1
Development of new or changing regulations	2	2	2
Monitoring of compliance practices	3	3	3

Review of regulations	4	4	4
Innovation and technology adaptations	5	5	5
Don't know/unsure	6	6	6
Other - Specify	7	7	7

Q23 – (Show options selected in Q17 OR options selected in Q16 if number of options is 3 or less) Ask all: How do the following SA regulators typically engage or consult with your business? Select all that apply

	Regulator 1	Regulator 2	Regulator 3
Initiated by regulator	1	1	1
Initiated by business	2	2	2
On a collaborative basis	3	3	3
Don't know/unsure	4	4	4
Other - Specify	5	5	5

Q24 – (Show options selected in Q17 OR options selected in Q16 if number of options is 3 or less) Ask all: How do the following SA regulators monitor your business' compliance? Select all that apply

	Regulator 1	Regulator 2	Regulator 3
Regular or planned quality assurance tests/inspections/audits	1	1	1
Random or sporadic quality assurance tests/inspections/audits	2	2	2
Undisclosed quality assurance tests/inspections/audits	4	4	4
Require you to submit compliance monitoring plans	5	5	5
Automated reminders or requests	6	6	6
They don't monitor compliance	7	7	7
Don't know/unsure	8	8	8
Other - Specify	9	9	9

Q14 – Ask all: On a scale of 1-10 where 1=extremely poor and 10=extremely good, how would you rate all the SA regulators which you or your business has dealt with over the last 3 years, overall?

	1 – Extremely poor				→			10 – Extremely good		
Overall	1	2	3	4	5	6	7	8	9	10

Q15 – Ask all: What suggestions or examples do you have for good regulator practice or performance?

(Insert text box)

Q25 – Ask all: On a scale of 1-10 where 1=not at all important and 10=very important, how important is it to your business that the following changes are made when interacting with SA regulators? Select one option per line (rotate)

	1 – Not important				→			10 – Very important		
Better harmonisation between regulators/levels of government/jurisdictions	1	2	3	4	5	6	7	8	9	10
Greater sharing of information between regulators	1	2	3	4	5	6	7	8	9	10
Continuation of COVID initiatives	1	2	3	4	5	6	7	8	9	10
Remove duplications/inconsistencies	1	2	3	4	5	6	7	8	9	10
Create a 'one stop shop'/ point of contact for business/industry to engage with government	1	2	3	4	5	6	7	8	9	10

Part 3 Regulations

Q4 - Ask all: What do you consider to be the greatest benefits of South Australian regulations? Select all that apply.

Increase consumer confidence	1
Consumer protection	2
Protect business interests	3
Can tap into emerging technologies	4
Ensure consistent standards and level playing field	5
Workplace safety	6
Promote efficiency, innovation, and growth	7
Increase business confidence	8
Promote competition	9
Conserve the environment	10
None of the above	11
Other (please specify)	12

Q5 – Ask all: How often (if at all) do you / your business experience the following issues when complying with South Australian regulations?
Select one option per line (rotate)

	1 – Never	2 – A little of the time	3 – Some of the time	4 – Most of the time	5 – All of the time
Time consuming processes	1	2	3	4	5
Unreasonable costs	1	2	3	4	5
Duplication or inconsistencies	1	2	3	4	5

Poor communication / information is difficult to understand	1	2	3	4	5
Outdated or inflexible regulations	1	2	3	4	5

Q5a - (Code 2-5 for elapsed time in Q5) What aspects of SA regulations take the most time in your business? Select all that apply

Finding, understanding and seeking advice on regulations	1
Filling in forms	2
Waiting for approvals/decisions	3
Meeting/facilitating ongoing compliance requirements i.e. completing paperwork, reporting, inspections/audits	4
Fulfilling requests for additional or repeated information or reworking paperwork	5
Costs associated with delays to business investment projects	6
Other – **Specify**	7

Q5b - (Code 2-5 for significant costs in Q5) What are the most significant costs associated with regulatory compliance in SA? Select all that apply

Regulatory start-up costs – registration, permit & licensing fees	1
Regulatory ongoing costs – registration, permit & licensing fees	2
Additional fixed capital costs required to get approvals and ensure ongoing compliance	3
Additional human resource costs required to get approvals and ensure ongoing compliance (includes additional staff and hiring experts)	4
Additional IT related costs to get approvals and ensure ongoing compliance (e.g. new software to obtain and report data)	5

Levies, penalties and fines	6
Planning & development approval costs to expand or adapt	7
Other – **Specify**	8

Q5c - (Code 2-5 for duplicated information or inconsistencies in Q5) How is the information from SA regulators duplicated or inconsistent? Select all that apply

Inconsistent information provided by multiple areas/individuals within the same regulator	1
Additional or repeated requests for information are received from the same regulator	2
The amount of information required is not always proportionate to the level of risk for a project	3
Inconsistent information and/or requirements between different SA Government regulators	4
Inconsistent information and/or requirements between different regulators from different levels of government (local, state, and Federal)	5
Duplicate information and/or requirements between different SA Government regulators	6
Duplicate information and/or requirements between different regulators from different levels of government (local, state and Federal)	7
Lack of collaboration and resource sharing between regulators for compliance monitoring (e.g. inspections, audits etc)	8
Lack of collaboration between regulators on approval/decision making	9
Other – **Specify**	10

Q5d - (Code 2-5 for Communication in Q5) What issues do you experience when communicating with SA regulators? Select all that apply

Reworking paperwork that does not meet the regulator's requirements (i.e. understanding what is required to be included etc)	1
Difficulty understanding the implications of changes/updates to regulations including market disruptions	2
Difficulty in finding readily available and all relevant regulation information	3

Lack of communication or updates from regulators on stages of an approval/decision process	4
Lack of transparency on decision making and avenues for appeal	5
Lack of engagement or consultation with business on development or changes to regulations	6
Lack of opportunities and methods that help businesses to provide feedback and seek advice/support	7
Subjective interpretation of legislation	8
Other (specify)	9

Q5e - (Code 2-5 for outdated and inflexible regulations in Q5) How do outdated and inflexible regulations affect your business? Select all that apply

Do not reflect modern business practices (new technologies and innovations)	1
Do not adapt to market disruptions	2
Requirements do not match business risk (e.g. onerous requirements for low risk activities)	3
A 'one size fits all' focus (does not account for different business models or capabilities)	4
Other – Specify	5

Q6 – Ask all: What changes and improvements would you like to see to SA regulations? Please list up to THREE.

1 (Insert text box)
2 (insert text box)
3 (Insert text box)

Q7 – Ask all: On a scale of 1-10 where 1=not at all important and 10=very important, how important is it that the following improvements are made to the SA regulatory environment? Select one option per line (rotate)

	1 – Not important			→						10 – Very important	Don't know / not sure
Reduce timeframes	1	2	3	4	5	6	7	8	9	10	11
Reduce costs	1	2	3	4	5	6	7	8	9	10	11
Remove redundant regulations	1	2	3	4	5	6	7	8	9	10	11
Better consultation and engagement with stakeholders	1	2	3	4	5	6	7	8	9	10	11
Increase access to and availability of information	1	2	3	4	5	6	7	8	9	10	11
Simplify requirements	1	2	3	4	5	6	7	8	9	10	11
Reward good behaviour e.g., reduce compliance monitoring and fees	1	2	3	4	5	6	7	8	9	10	11
Greater transparency in decisions and appeal avenues	1	2	3	4	5	6	7	8	9	10	11

Q8 – Ask all: Does your business trade in other states/territories/countries? Select one

Yes, with other states/territories	1
Yes, with other countries	2
Yes, with other states/territories and countries	3
No, only SA	4
Don't know / unsure	5

Q9 – (Code 1 and 3 in Q8) How does the number of SA regulations compare with those of other states? Select one

About the same	1
SA has more regulations	2
SA has fewer regulations	3
Don't know / unsure	4

Q10 – (Code 1 and 3 in Q8) How much easier or harder do you think it is to comply with SA regulations compared to with those of other states? Select one

Easier to comply in SA	1
About the same	2
Harder to comply in SA	3
Don't know / unsure	4

Q11 – Ask all: Have SA regulations hindered your ability to expand your business interstate or overseas?

Yes	1
No	2
Don't know / unsure	3
N/A, no plans to expand	4

Q12 – (Code 1 in Q11): Please describe how SA regulations have hindered your ability to expand your business interstate or overseas.

1 (Insert text box)

Q13 – Ask all: To what extent do you agree or disagree with each of the following statements about SA regulations in general, based on your experience over the last three years? Select one option per line (rotate)

	1 Disagree strongly → 5 Agree strongly				
Regulations help me expand my business	1	2	3	4	5
Regulations have helped my business to innovate	1	2	3	4	5
Regulations helped my business to develop new markets	1	2	3	4	5
Regulations helped maintain my business	1	2	3	4	5
Regulations have caused substantial losses to my business	1	2	3	4	5
Regulations prevented me from taking on more staff	1	2	3	4	5
Regulations help my business to be more productive	1	2	3	4	5
Compliance is time consuming	1	2	3	4	5

Q26 – (Code 4-5 for SA regulations help my business to be more productive in Q13) How have SA regulations affected your business's productivity?

(Insert text box)

Q27 – (Code 4-5 for regulations helped my business innovate in Q13) How have regulators or regulations helped you to innovate in your business?

(Insert text box)

Q28 – Ask all: Were any regulations introduced or changed in SA during COVID that you would like to see continue? Select one

Yes	1
No	2
Don't know/unsure	3
N/A, COVID did not affect my business	4

Q29 – (Code 1 in Q28) Please describe which new or amended SA regulations you would like to see continue.

(Insert text box)

Q30 – Ask all: Should there be any new regulations or change to existing SA regulations in the future? Select one

Yes	1
No	2

Q31 – (Code 1 in Q30) What other SA regulations do you think should be introduced or changed for your industry?

(Insert text box)

Business demographics

Finally, a few more questions about your business (these are for analysis purposes only)

D1 - Please indicate which of the following industries your business is predominantly in. Select one

Food, Wine & Agribusiness (including fishing and forestry?)	1
Defence & Space	2

Health & Medical Industries	3
Tourism	4
International Education	5
Energy & Mining	6
Hi-Tech	7
Creative Industries	8
None of the above	9

D1a – (Code 9 in D1) Please indicate which of the following industries your business is predominantly in Select one

Agriculture, Forestry and Fishing	1
Manufacturing	2
Electricity, Gas, Water and Waste Services	3
Construction	4
Wholesale Trade	5
Retail Trade	6
Accommodation and Food Services	7
Transport, Postal and Warehousing	8
Information Media and Telecommunications	9
Financial and Insurance Services	10
Rental, Hiring and Real Estate Services	11
Professional, Scientific and Technical Services	12
Administrative and Support Services	13
Public Administration and Safety	14
Education and Training	15
Health Care and Social Assistance	16

Arts and Recreation Services	17
Other - Specify	18

D2 – Which option best describes your business's structure? Select one

Sole trader	1
Company	2
Partnership	3
Trust	4
Co-operative	5
Other	6

D3 – Is this a not-for-profit business? Select one

Yes	1
No	2

D4 – Excluding yourself, how many people are employed in your business in South Australia? Select one

0	1
1 - 4	2
5 – 19	3
20-199	4
200+	5

D5 - Which of the following best describes your business' average annual turnover pre-COVID? Select one

$0 - $49,999	1
$50,000 - $199,999	2
$200,000 - $1.9 million	3
$2 million - $4.9 million	4
$5 million or more	5
Don't know	6

D6 – How many years has your business been operating in SA? Select one

Less than a year	1
1-2 years	2
3-4 years	3
5-10 years	4
More than 10 years	5

OPTIONAL

O1 – Ask all: Will you be interested in receiving a short synopsis of findings from this research engagement?

Yes	1
No	2

O1a- Interested in receiving synopsis (Code 1 in O1) Please provide your contact details below to receive the synopsis:

Company		
Name		
Email		Mandatory
Contact number		

O2 – Ask all: Would you like to participate in further consultation about improving the regulatory environment in SA? Please note that if you select 'yes', your contact details will be shared with the SA Productivity Commission, however, all your responses will still be kept confidential and will not be shared.

Yes	1
No	2

O2a – Interested in further consultation but contact details not shared earlier (Code 1 in O2 and Code 2 in O1) Could you please provide contact details below:

Company		
Name		
Email		Mandatory
Contact number		

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