

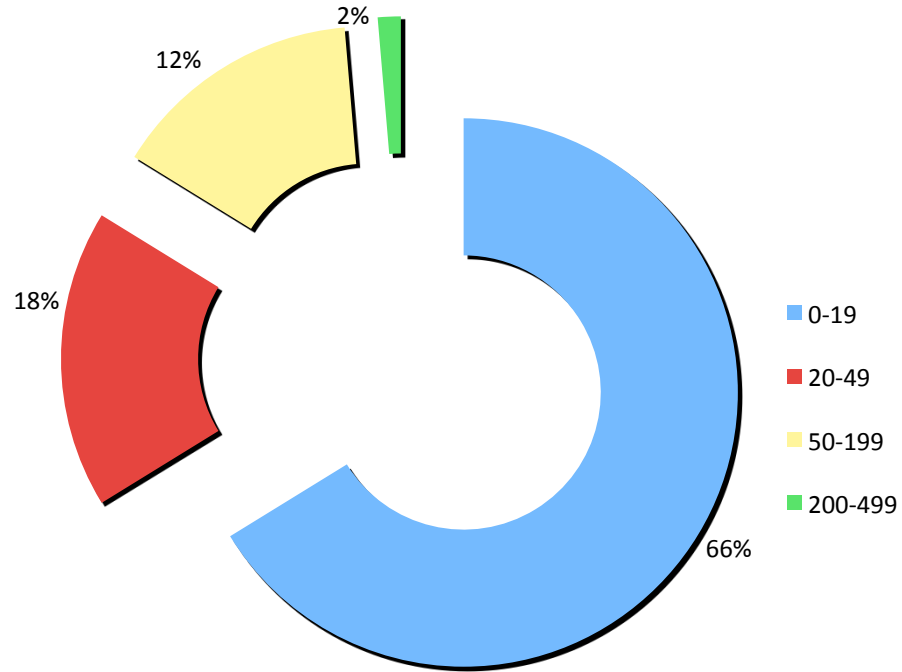
South Wales Chamber of Commerce

South Wales Chamber of Commerce Quarterly Economic Survey

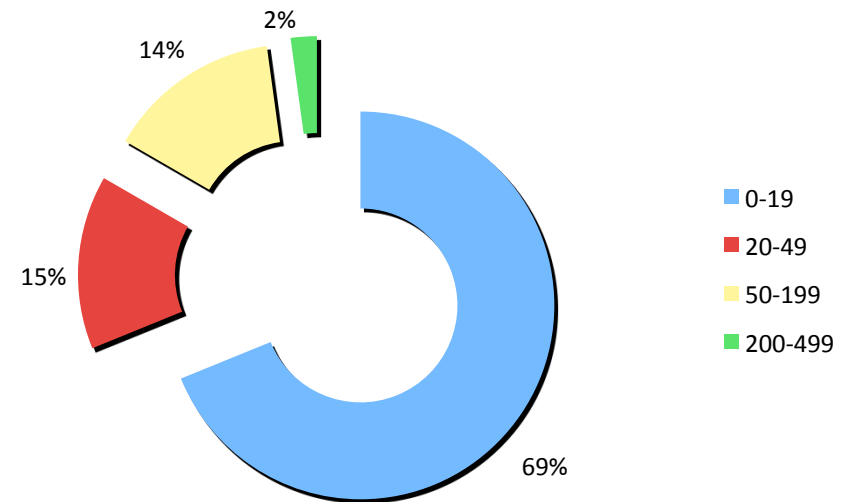
Q1 2009

Company size groupings

Q1 2009 - Number of Employees

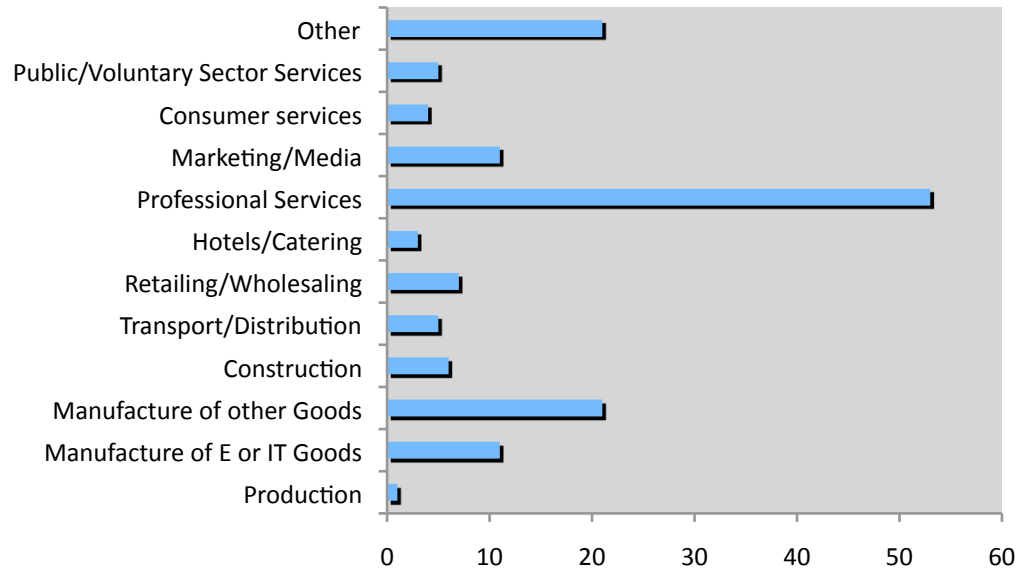


Q4 2008 - Number of Employees

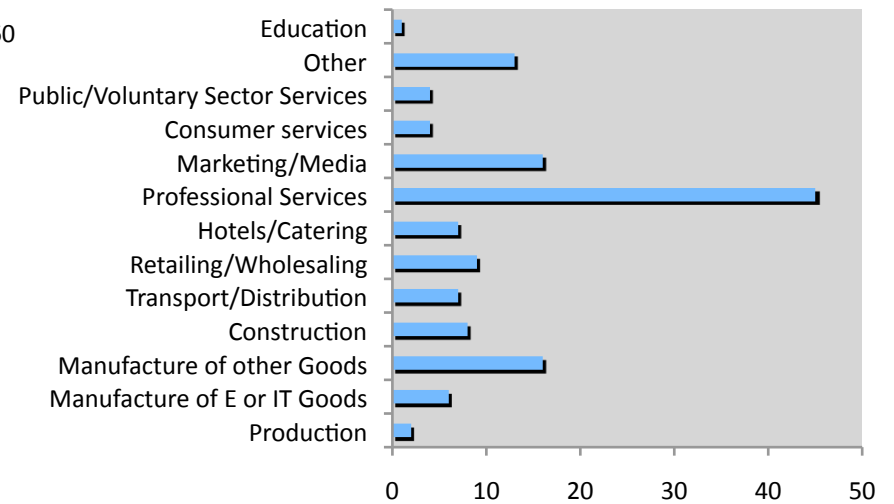


Profile of respondees

Q1 2009 - Business Activity

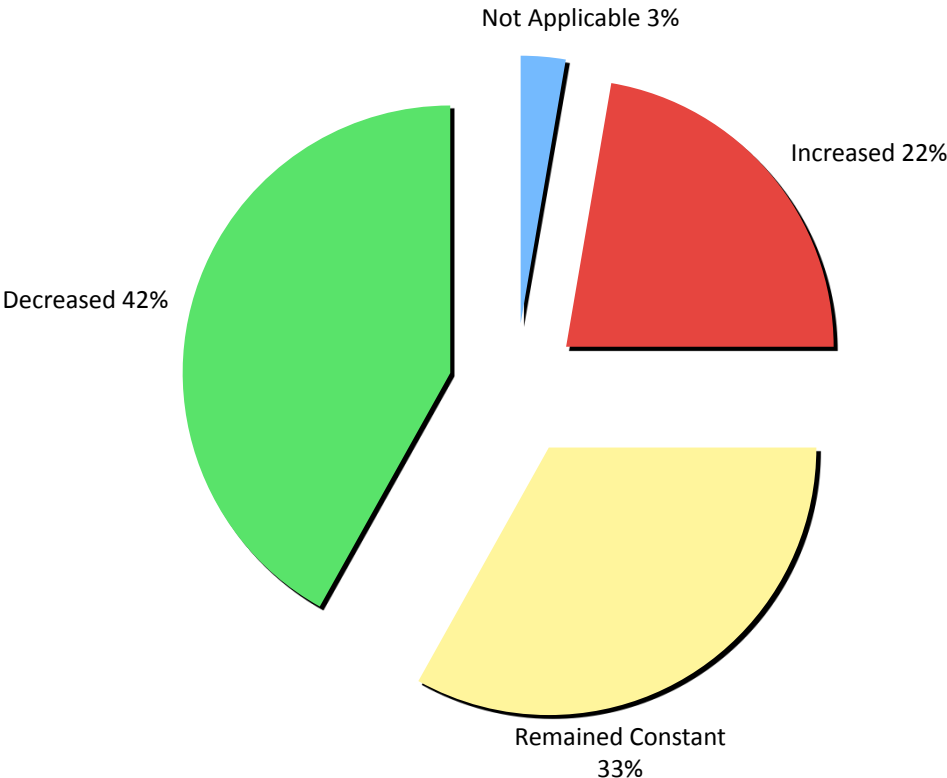


Q4 2008 - Business Activity

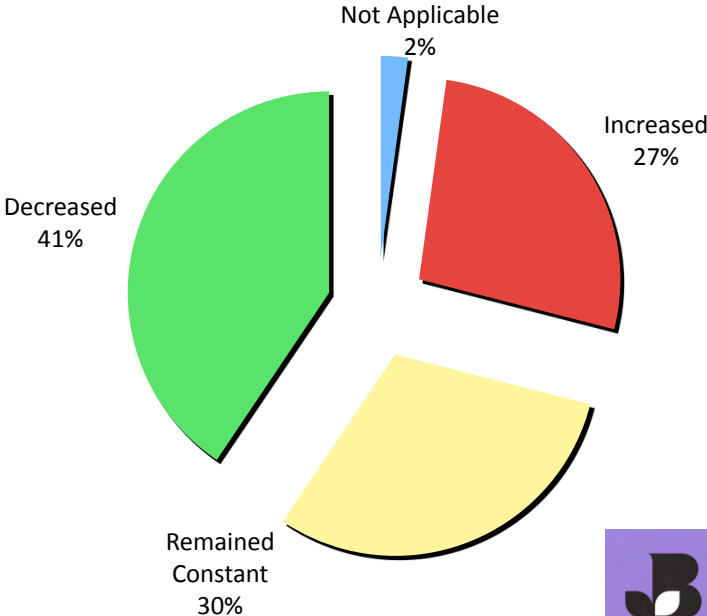


UK Sales - changes in the last quarter

Q1 2009 - Overall UK Sales

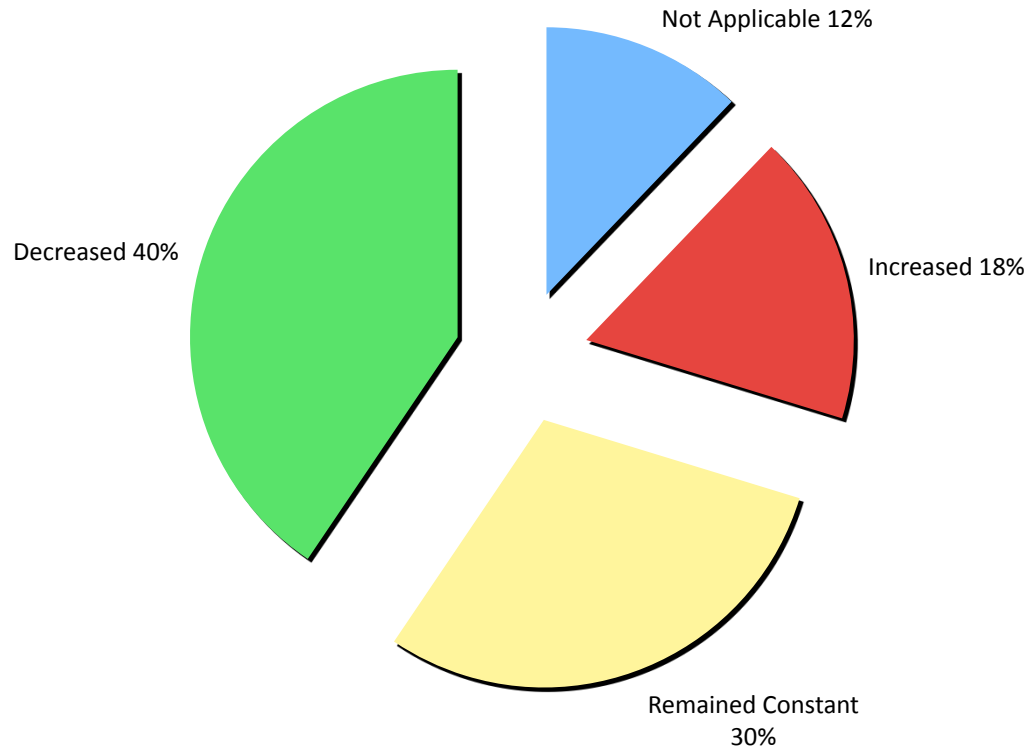


Q4 2008 - Overall UK Sales

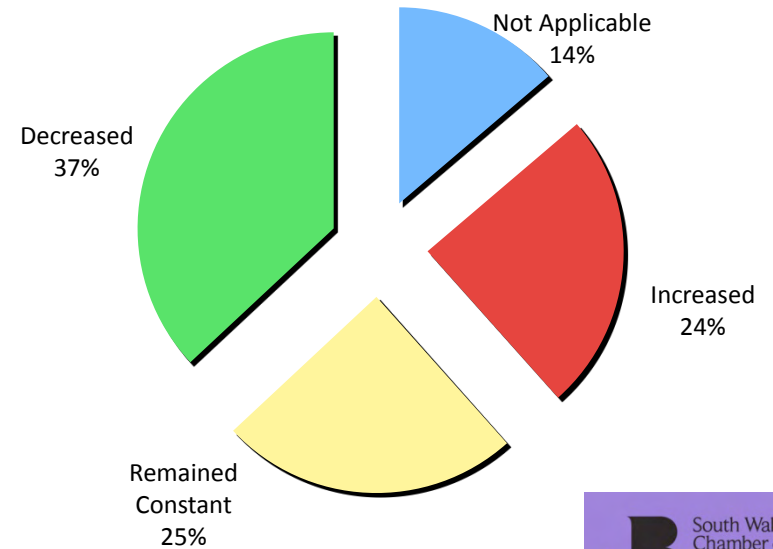


UK Orders - changes in the last quarter

Q1 2009 - Overall UK Orders

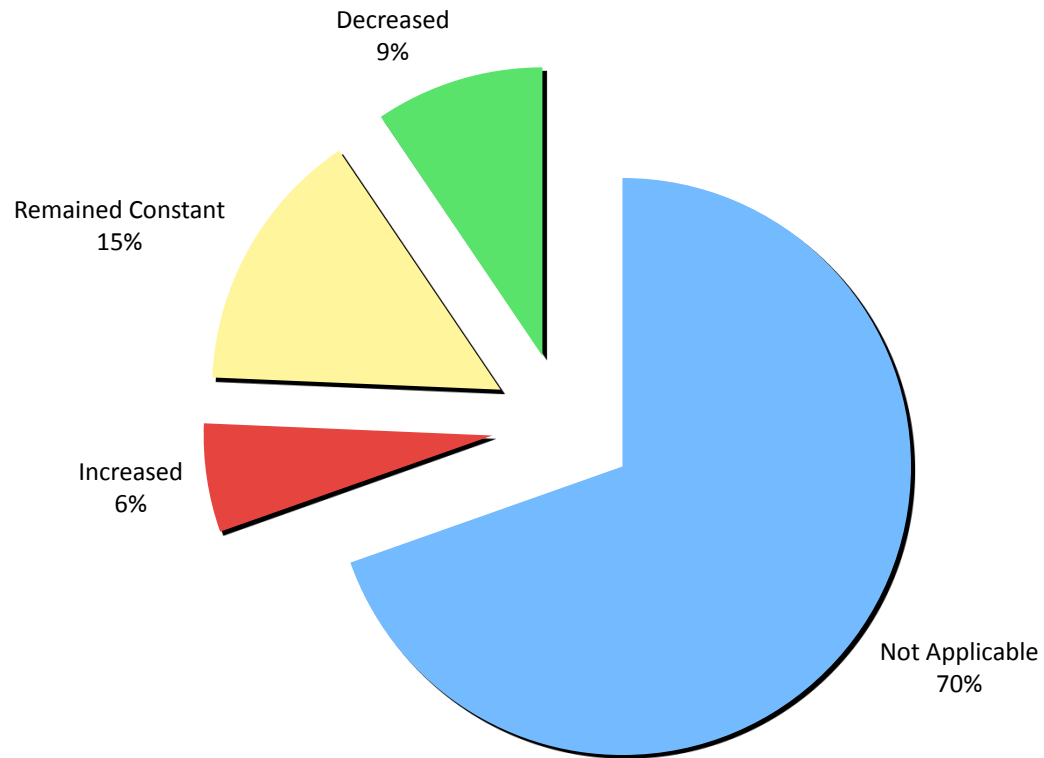


Q4 2008 - Overall UK Orders

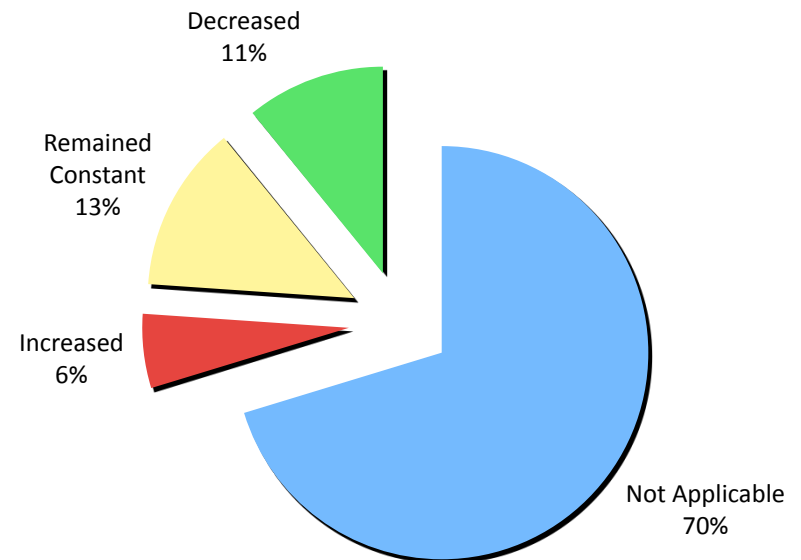


Export Sales - changes in the last quarter

Q1 2009 - Overall Export Sales

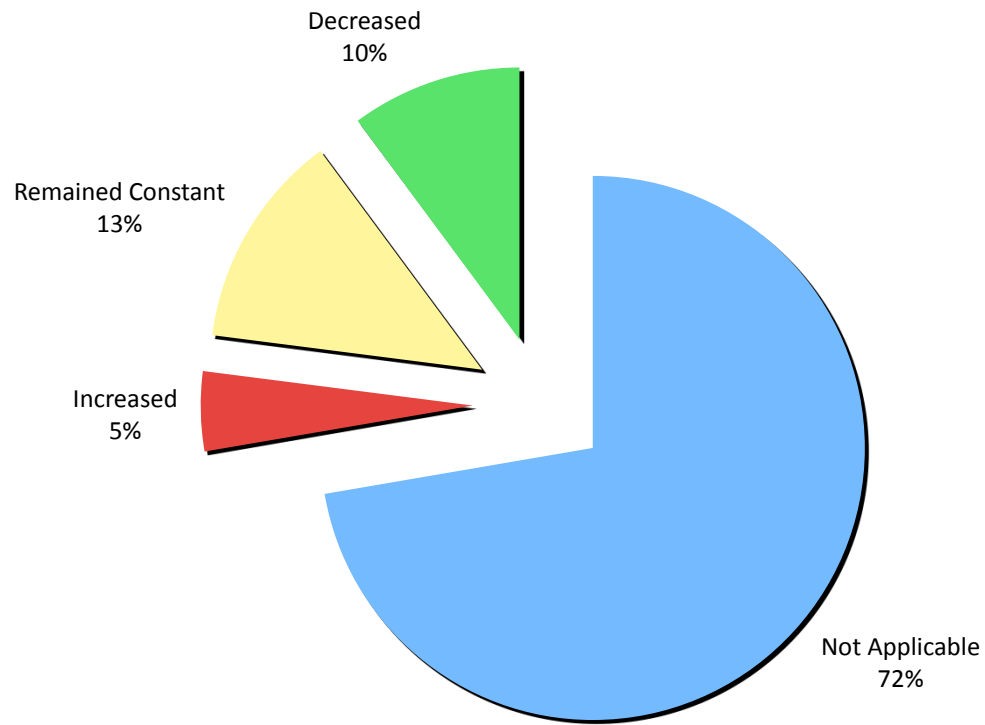


Q4 2008 - Overall Export Sales

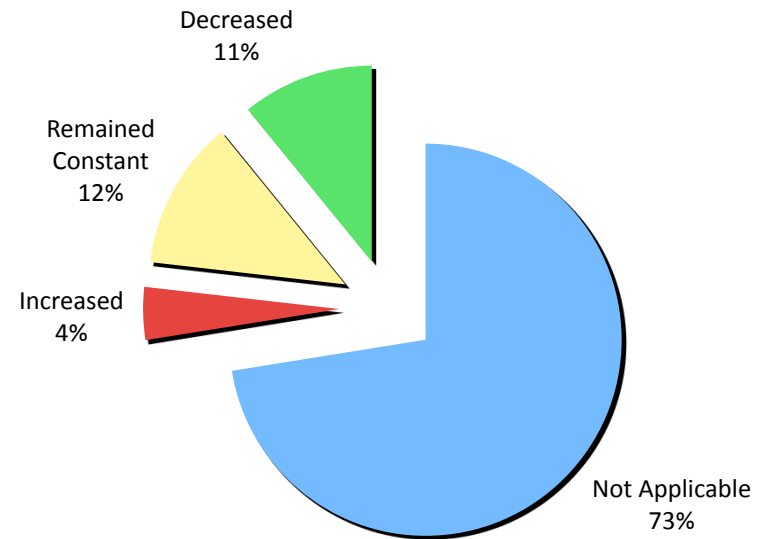


Export Orders - changes in the last quarter

Q1 2009 - Overall Export Orders

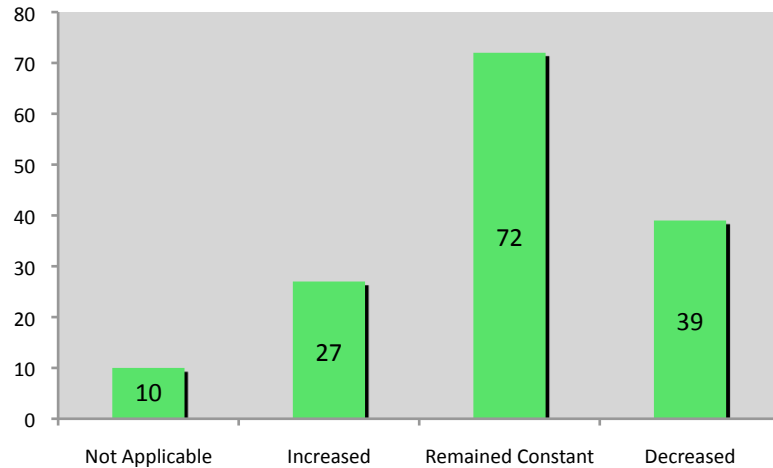


Q4 2008 - Overall Export Orders

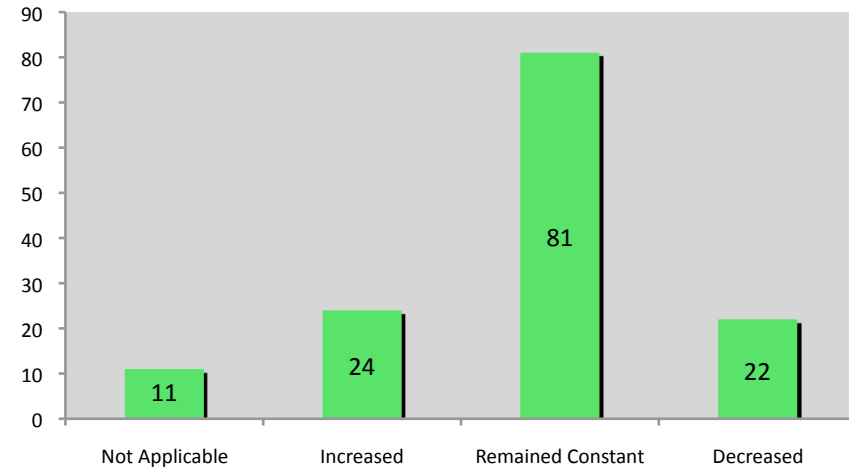


Workforce changes and expectations

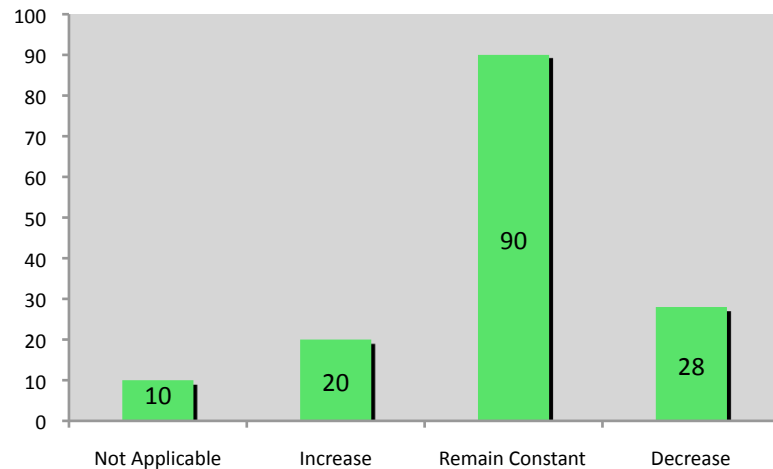
Q1 2009 - Workforce Changes in past quarter



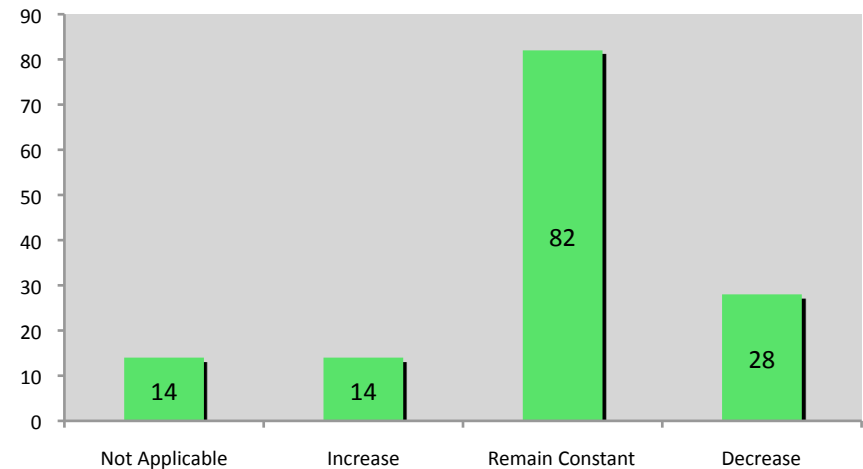
Q4 2008 - Workforce Changes in past quarter



Q1 2009 - Workforce Changes in next quarter

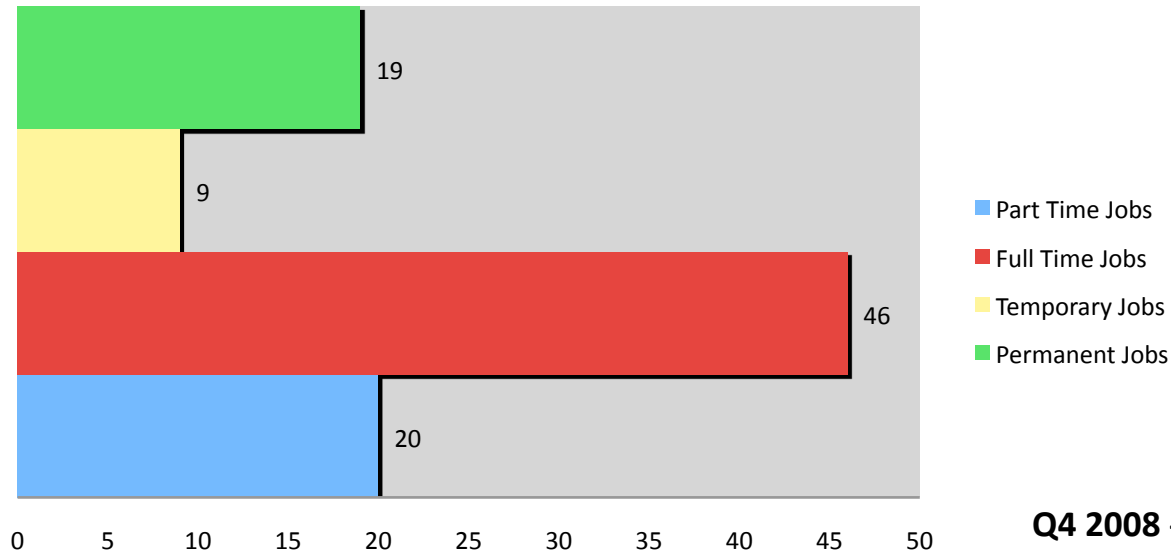


Q4 2008 - Workforce Changes in next quarter

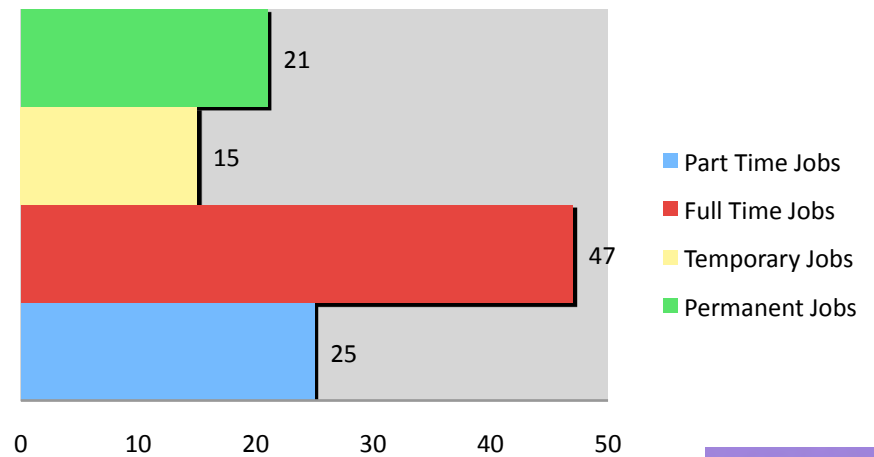


Staff recruitment

Q1 2009 - Types of Staff attempted to recruit

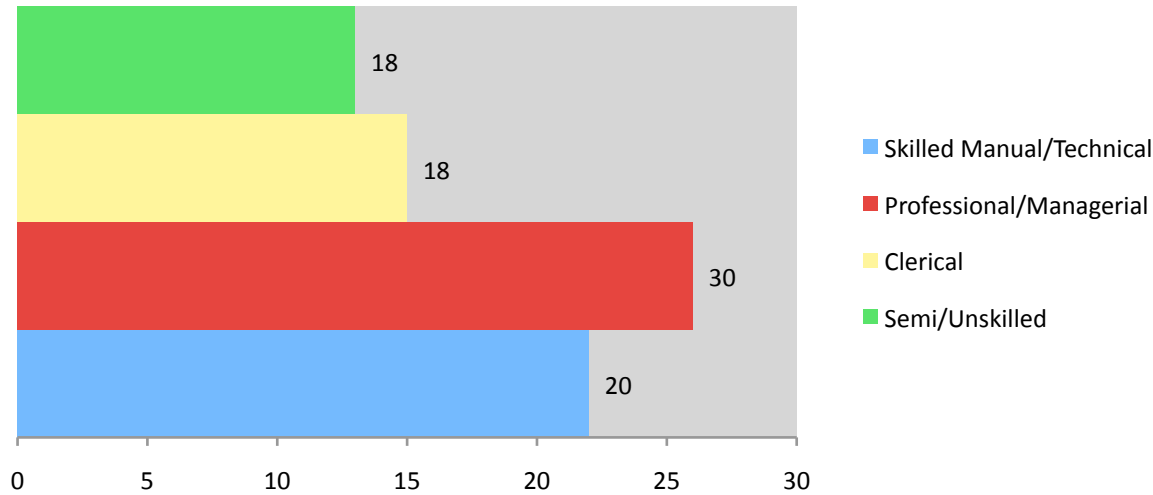


Q4 2008 - Types of Staff attempted to recruit

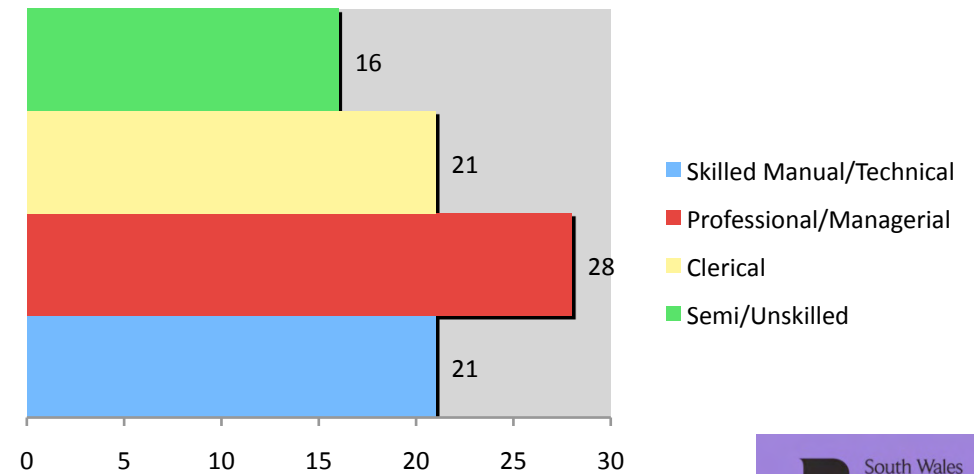


Difficulties in staff recruitment

Q1 2009 - Types of Staff difficult to recruit

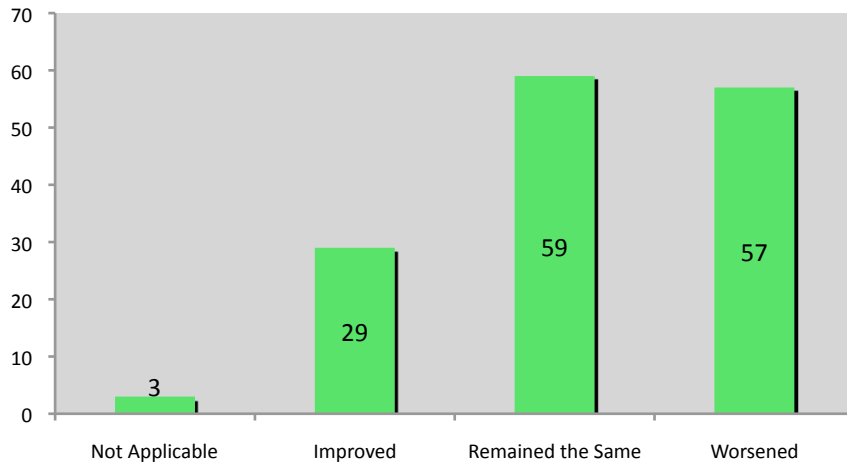


Q4 2008 - Types of Staff difficult to recruit

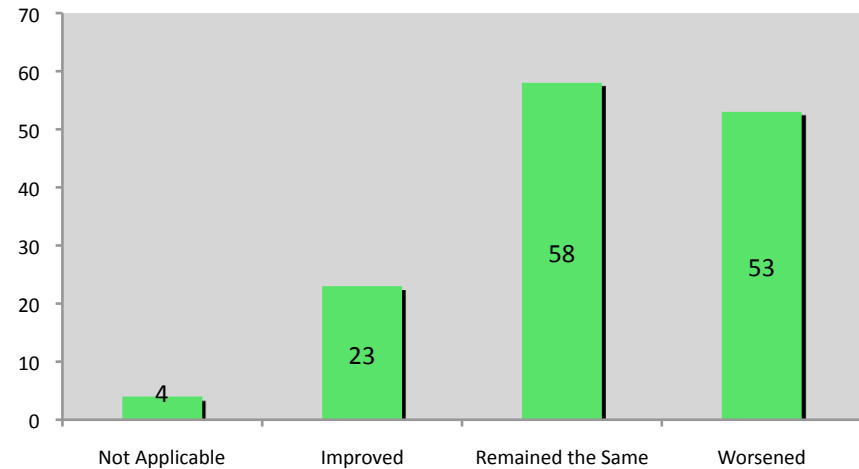


Cashflow & price changes and expectations

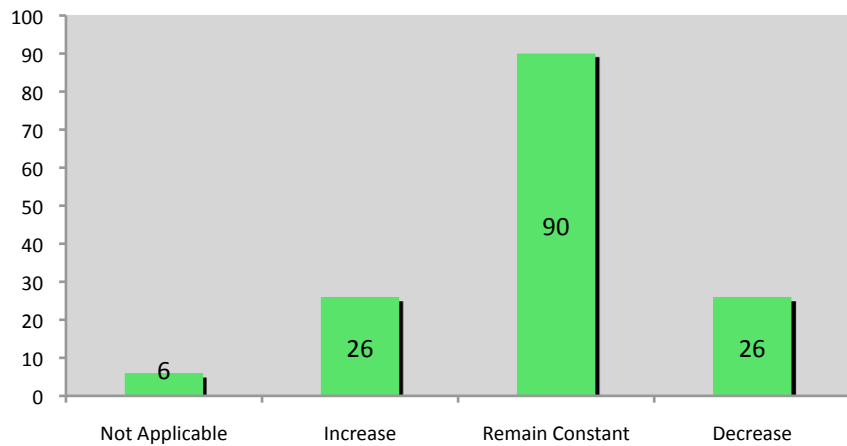
Q1 2009 - Changes in Cashflow over previous quarter



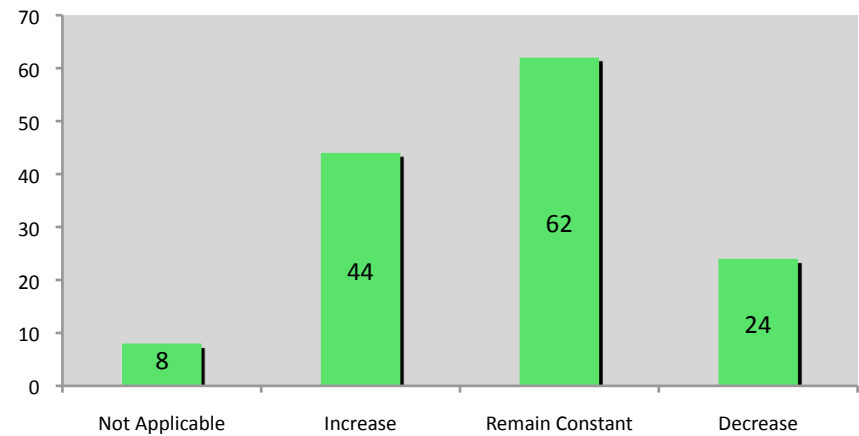
Q4 2008 - Changes in Cashflow over previous quarter



Q1 2009 - Expectations for Prices over next quarter

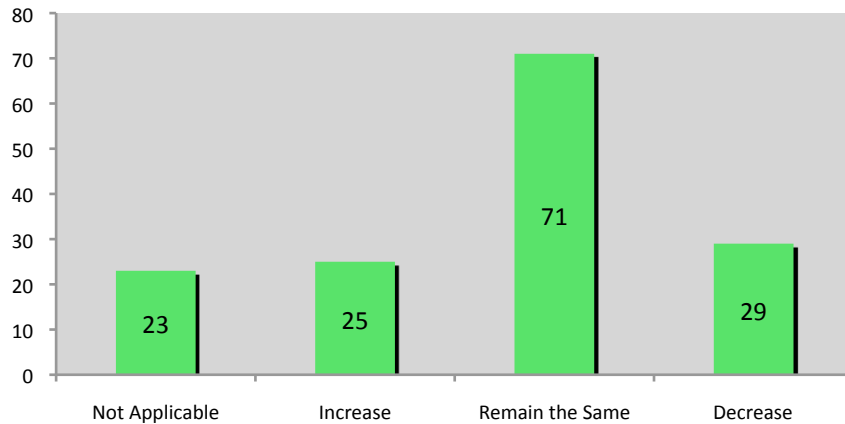


Q4 2008 - Expectations for Prices over next quarter

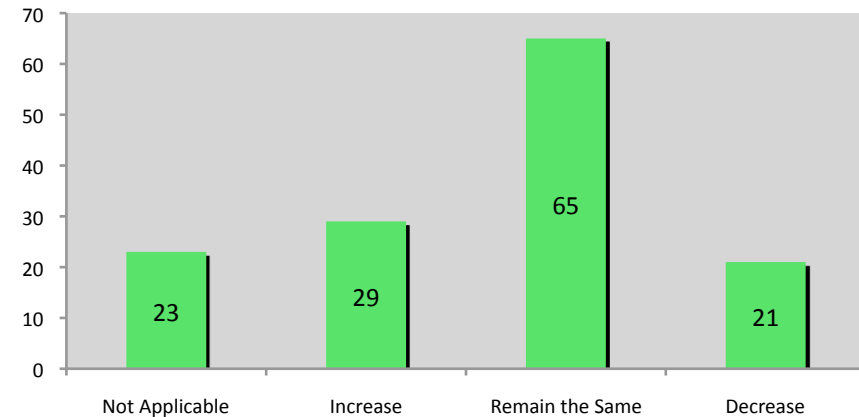


Investment in training & PME

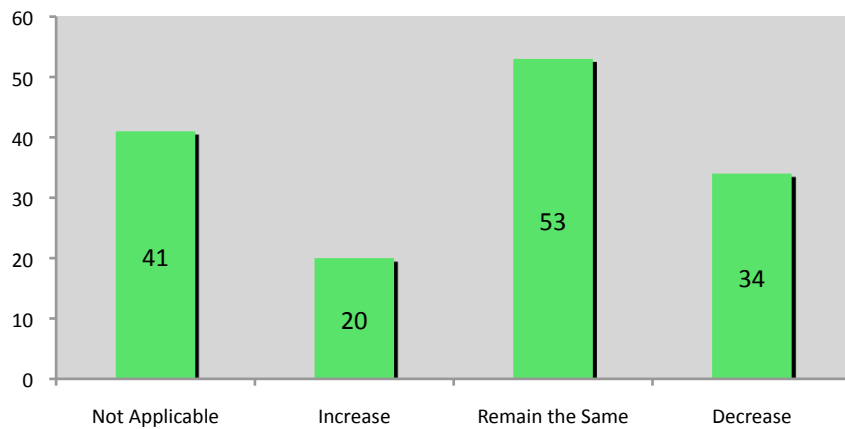
Q1 2009 - Plans for Training in next quarter



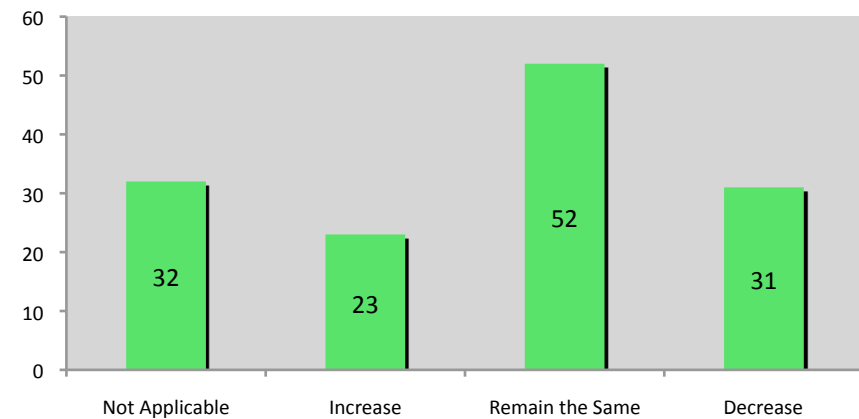
Q4 2008 - Plans for Training in next quarter



Q1 2009 - Plant & Equipment Investment plans for next quarter

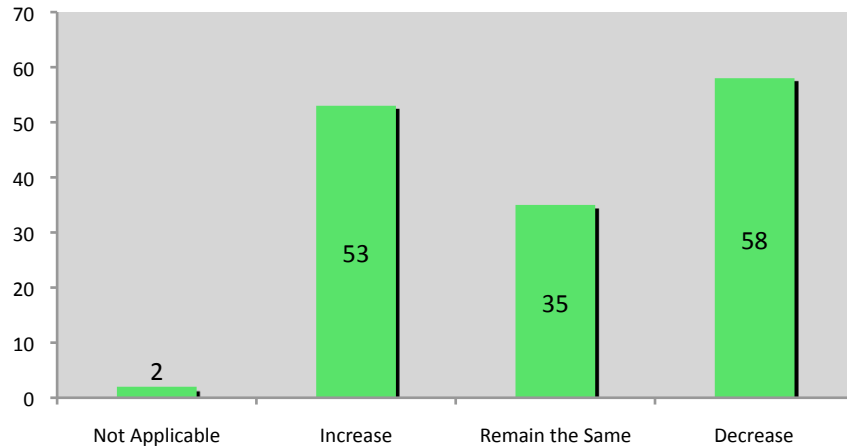


Q4 2008 - Plant & Equipment Investment plans for next quarter

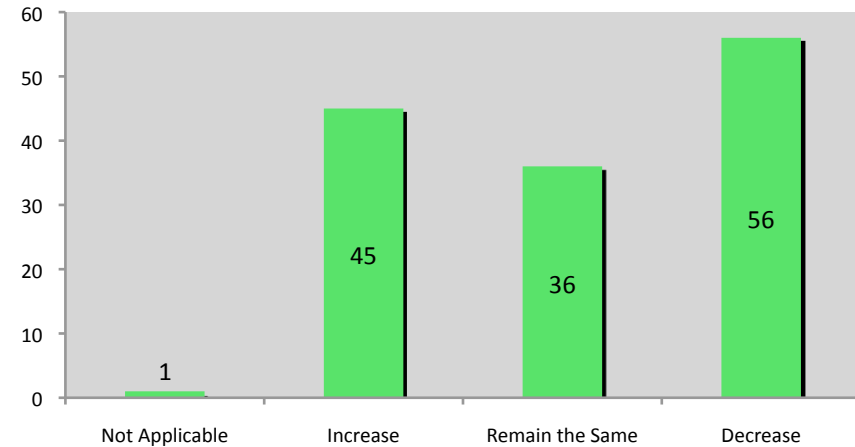


Business optimism - 12 month expectations

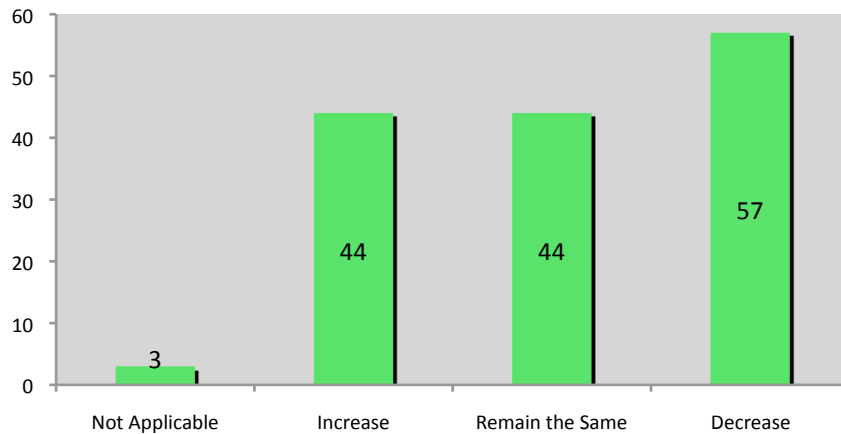
Q1 2009 - Turnover expectations in next quarter



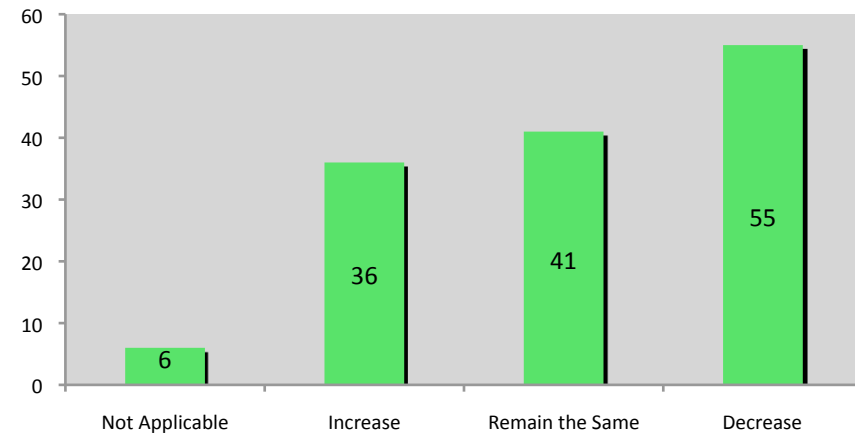
Q4 2008 - Turnover expectations in next quarter



Q1 2009 - Profitability expectations in next quarter

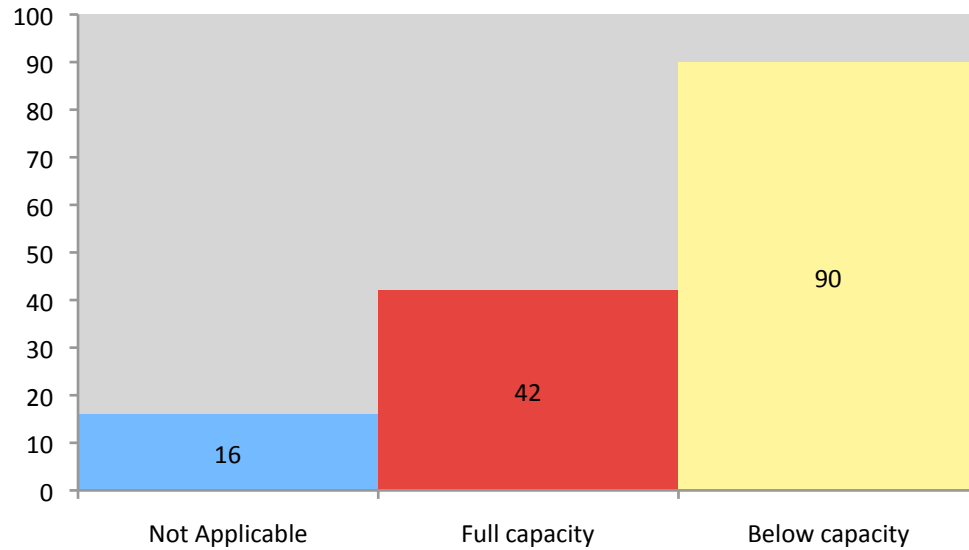


Q4 2008 - Profitability expectations in next quarter

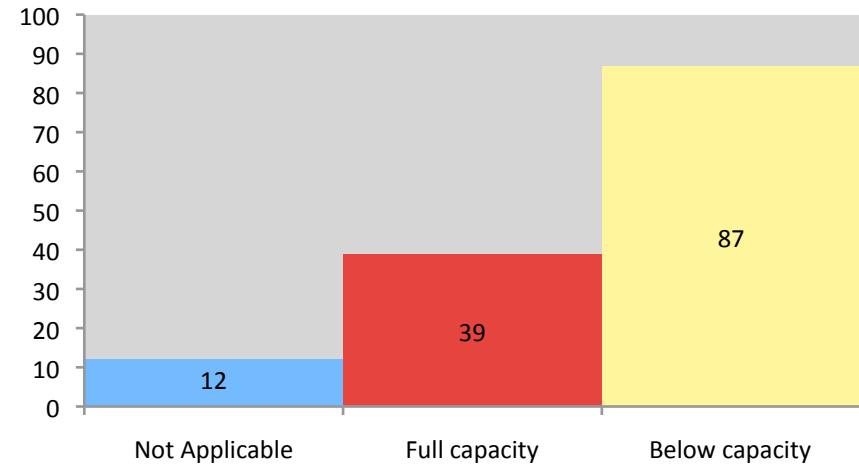


Operating at capacity

Q1 2009 - Operating at capacity

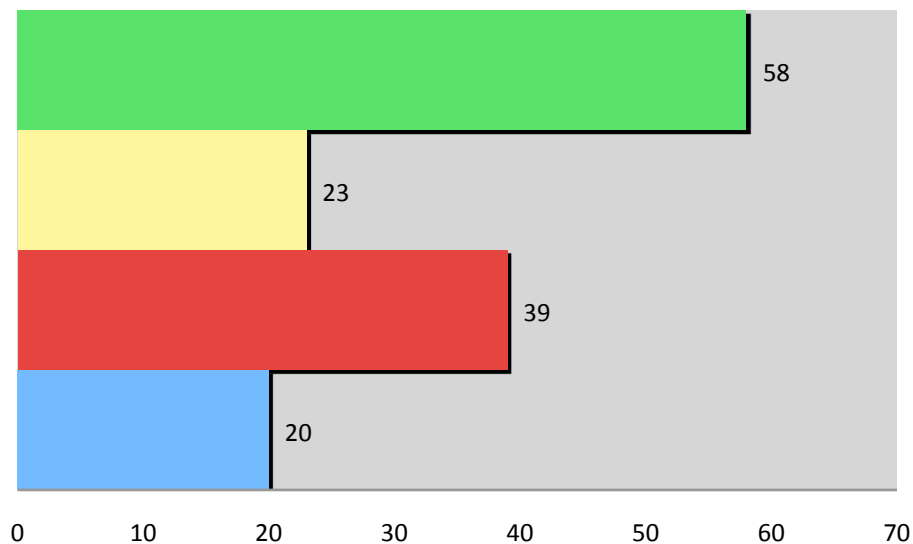


Q4 2008 - Operating at capacity



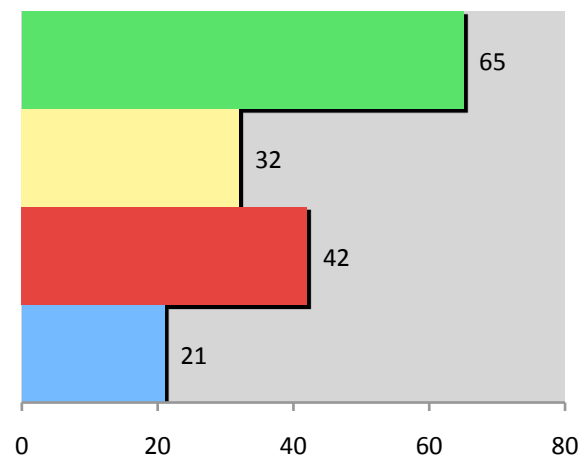
Pressures on businesses

Q1 2009 - Pressures on businesses



- Pay settlements
- Raw material prices
- Finance costs
- Other overheads

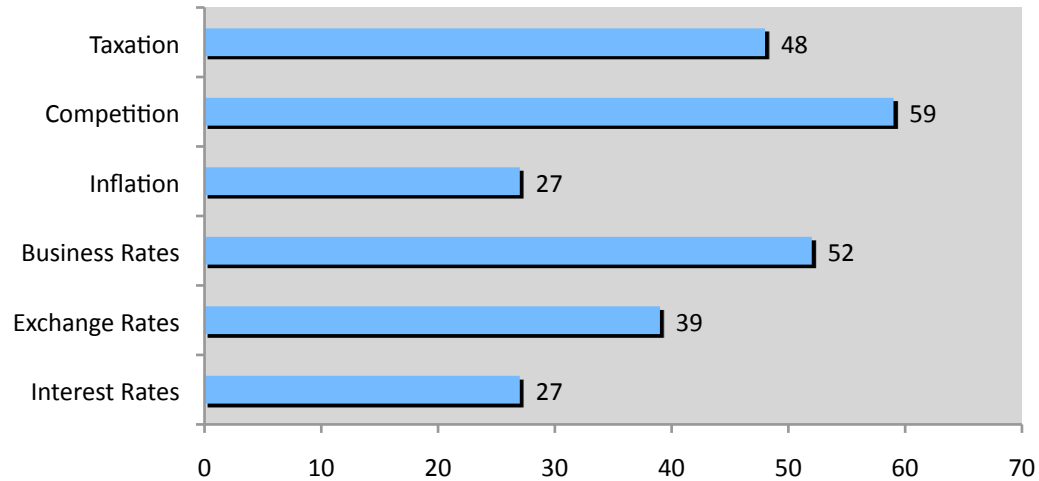
Q4 2008 - Pressures on businesses



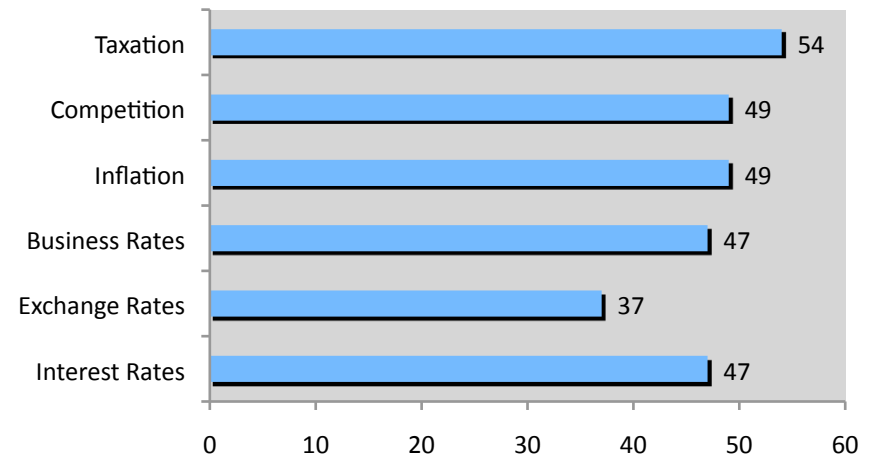
- Pay settlements
- Raw material prices
- Finance costs
- Other overheads

Business concerns

Q1 2009 - Concerns



Q4 2008 - Concerns



The South Wales Chamber Quarterly Economic Survey Q1
2009 has been managed for South Wales Chamber of Commerce by The Third Stage Group.

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