

West Wales Chamber of Commerce

South West Wales Quarterly Economic Survey

Q2 2010



the
third stage



South West Wales QES Q2 2010



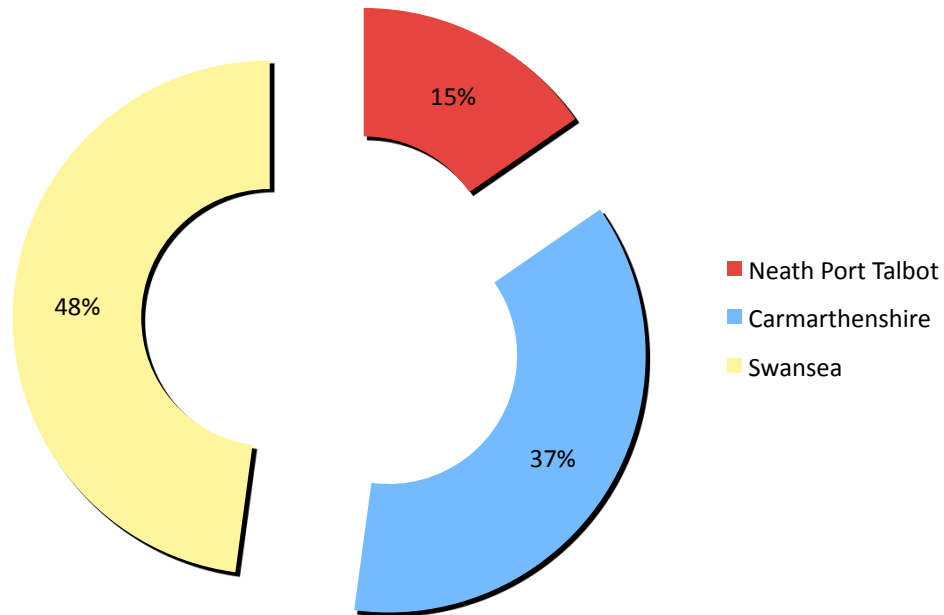
Possible headlines for a press release

The following key points could be used in a press release:

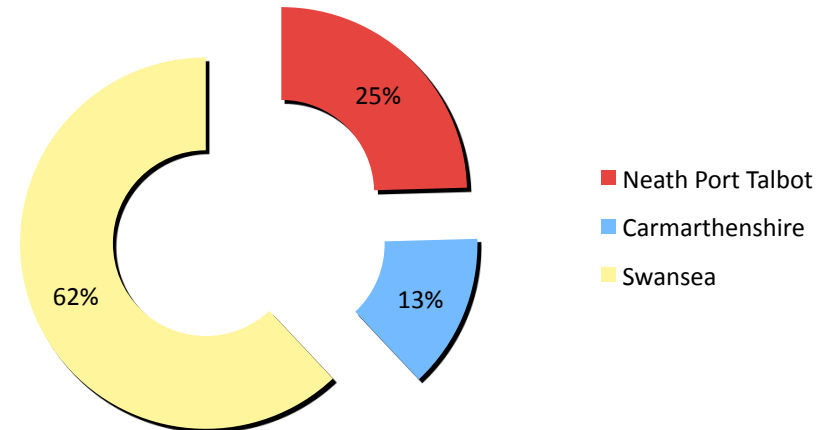
- **Mixed results for West Wales in the last three months**
 - Worsening Sales performance compared to Q1, with even poorer order book performance which suggests that sales are being made from order books which may lead to further problems next quarter.
 - Cashflow improving for fewer firms in Q2 than in Q1 (10% - vs. – 15%)
 - Expectations for next quarter turnover and profitability increases lower than last quarter.
- **Capacity**
 - 25% of businesses are operating at full capacity compared to 21% in Q1.
- **Recruitment**
 - 16% increased workforce numbers in Q2 compared to 14% in Q1. 14% think their workforce will increase in Q3.
- **Business Concerns**
 - Competition remains the biggest business concern followed by Taxation and Business Rates..

Geographical spread of respondees

Q2 2010 - Location of businesses

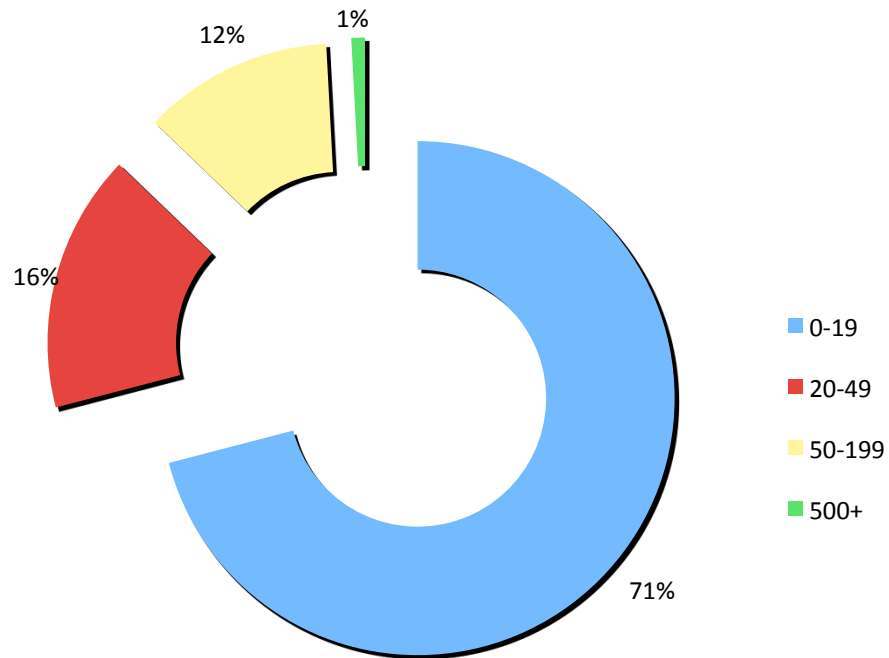


Q1 2010 - Location of businesses

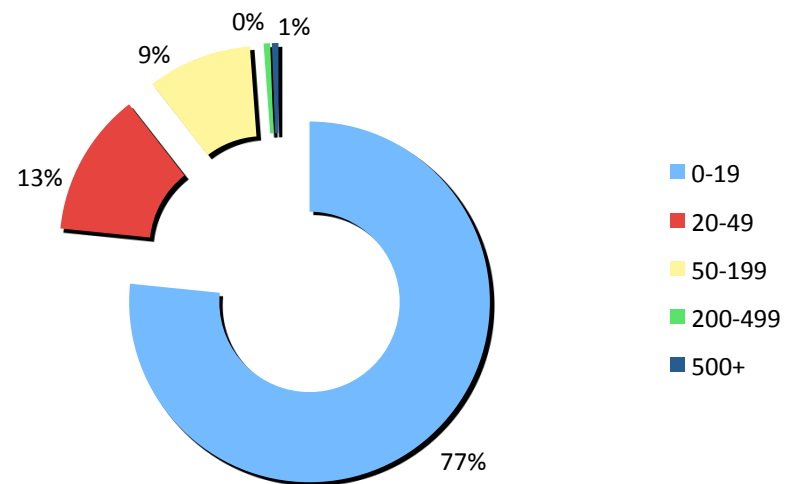


Company size groupings

Q2 2010 - Number of employees

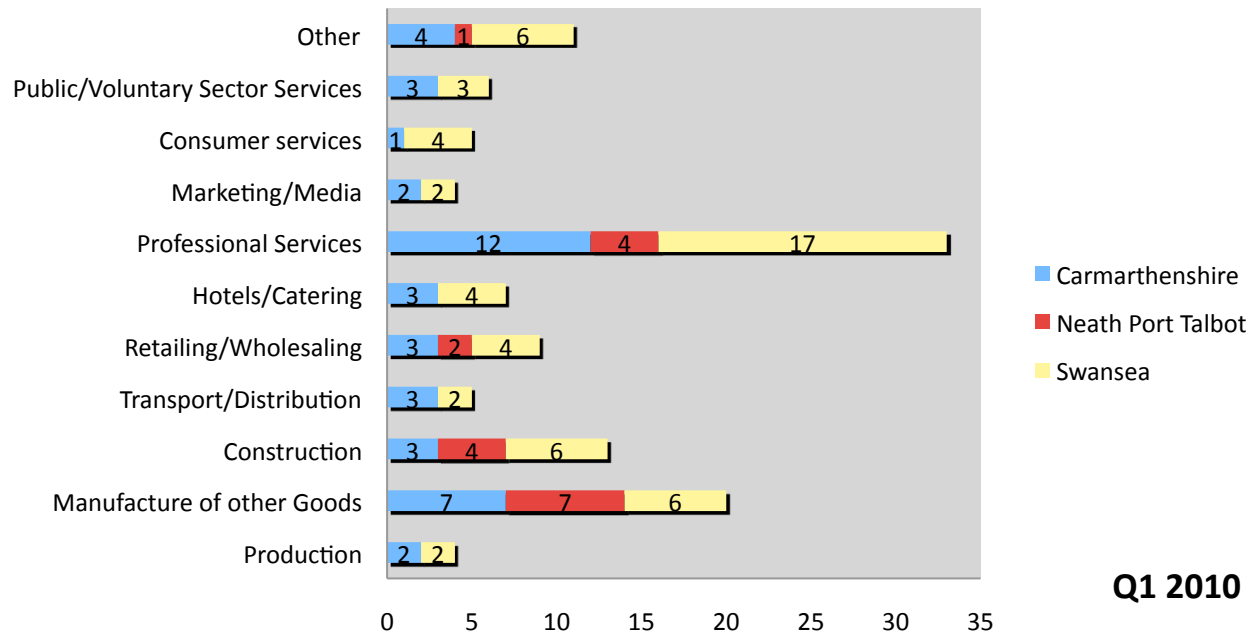


Q1 2010 - Number of employees

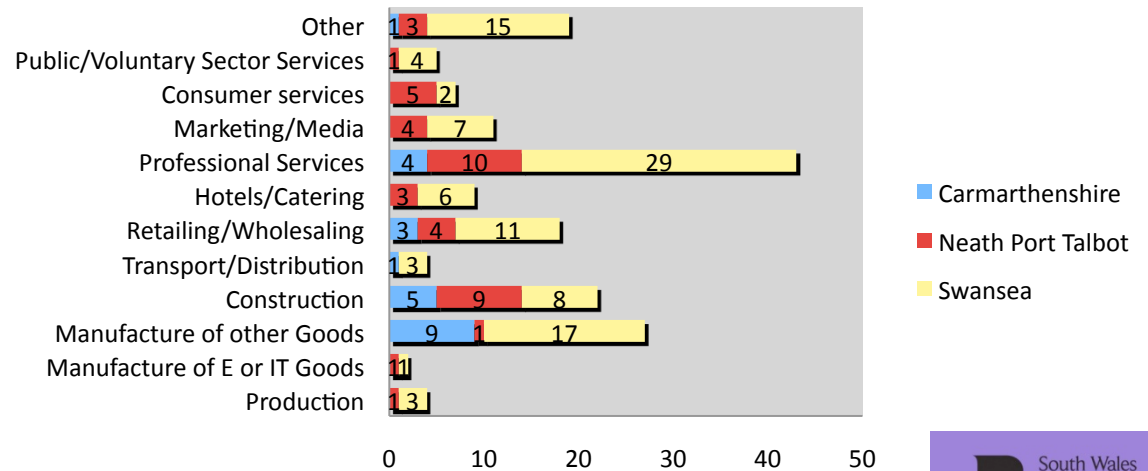


Profile of respondees

Q2 2010 - Business activity

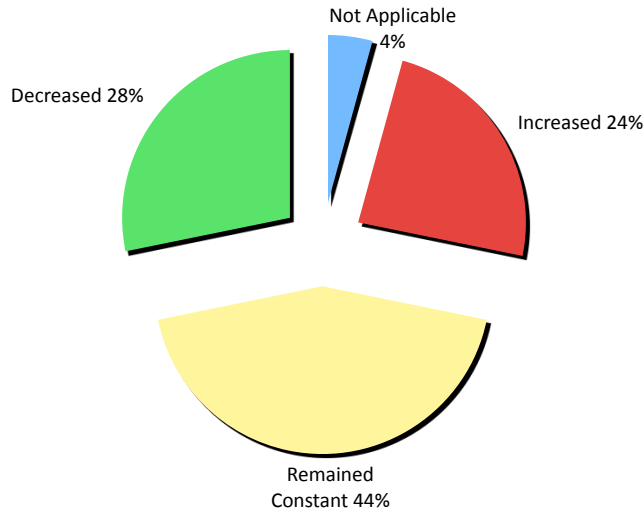


Q1 2010 - Business activity

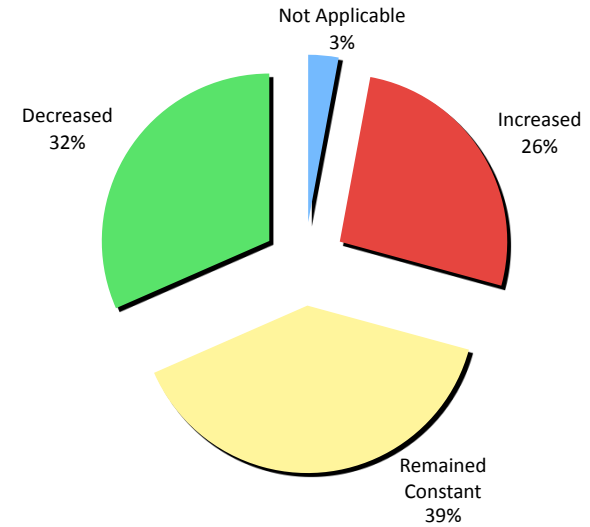


UK Sales - changes in the last quarter

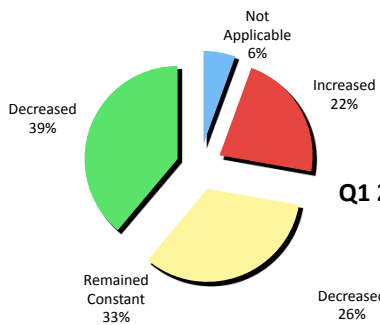
Q2 2010 - Overall UK Sales



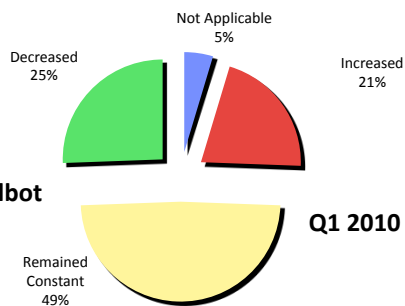
Q1 2010 - Overall UK Sales



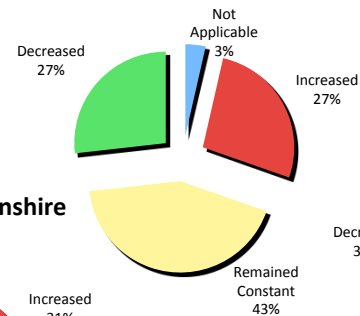
Q2 2010 - Neath Port Talbot



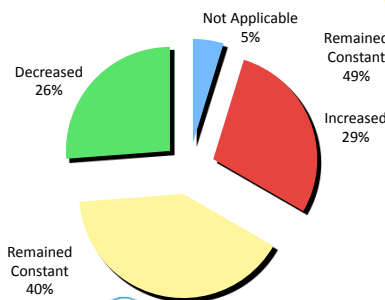
Q2 2010 - Carmarthenshire



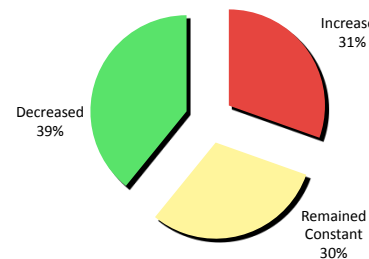
Q2 2010 - Swansea



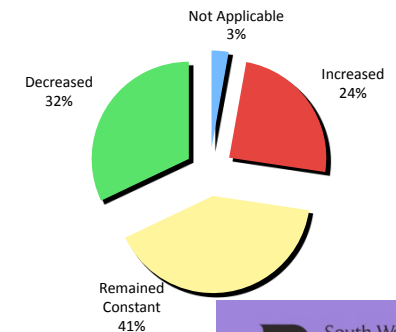
Q1 2010 - Neath Port Talbot



Q1 2010 - Carmarthenshire

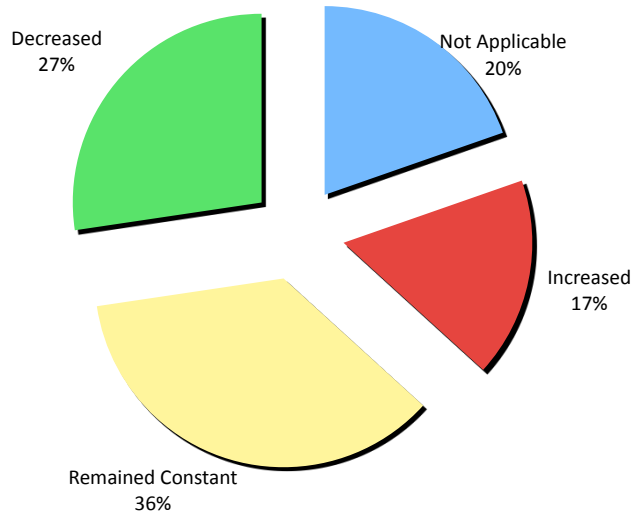


Q1 2010 - Swansea

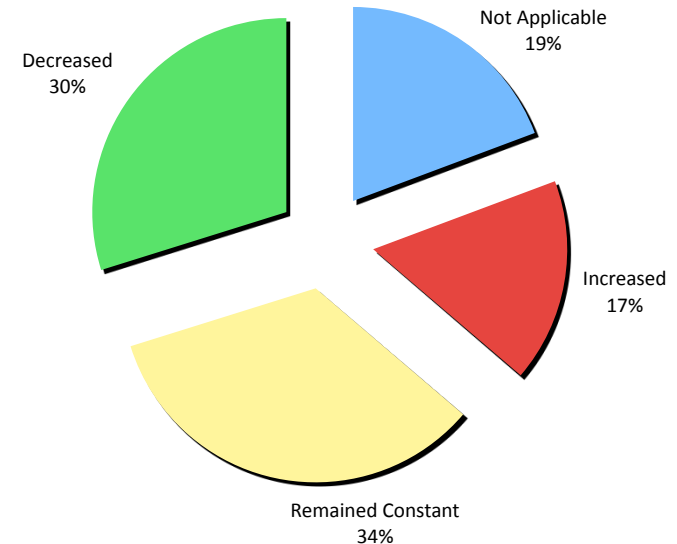


UK Orders - changes in the last quarter

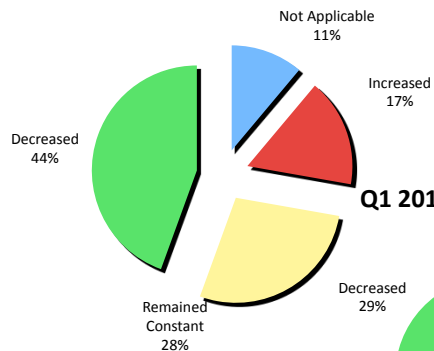
Q2 2010 - Overall UK Orders



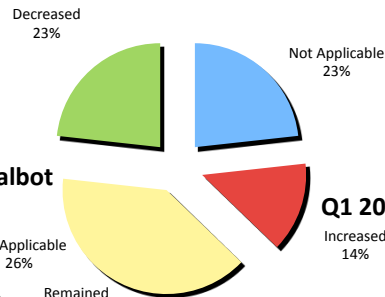
Q1 2010 - Overall UK Orders



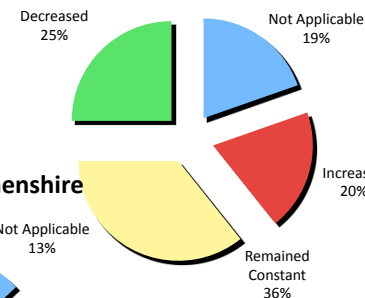
Q2 2010 - Neath Port Talbot



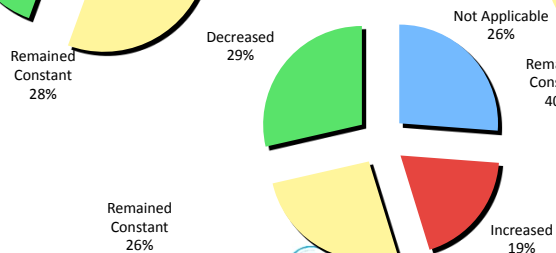
Q2 2010 - Carmarthenshire



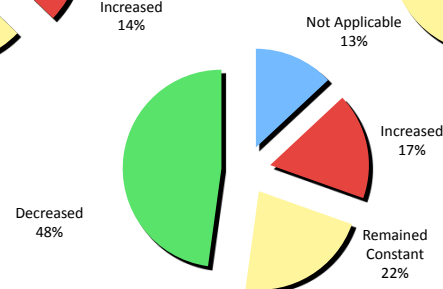
Q2 2010 - Swansea



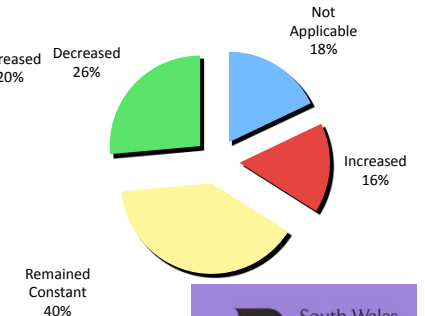
Q1 2010 - Neath Port Talbot



Q1 2010 - Carmarthenshire

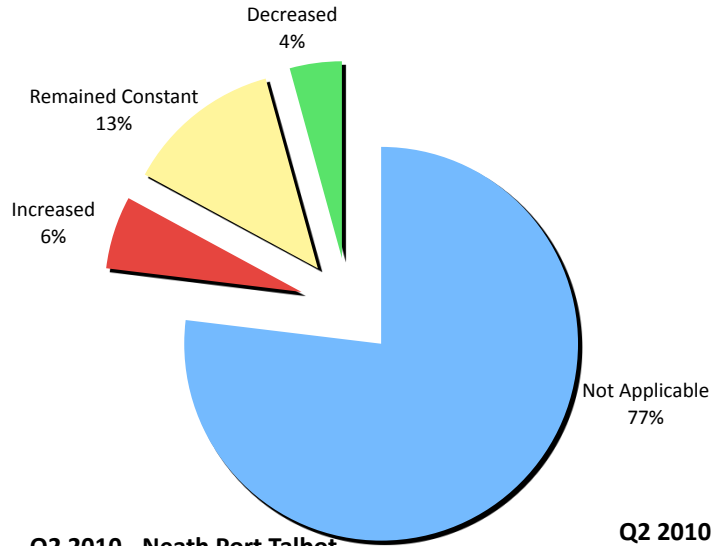


Q1 2010 - Swansea

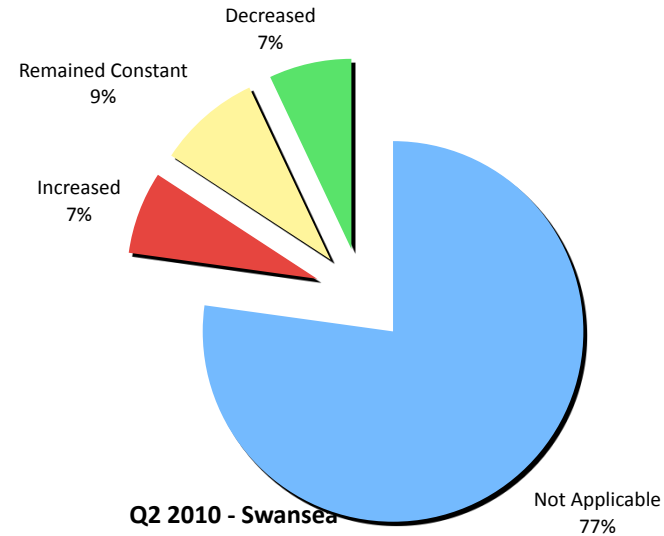


Export Sales - changes in the last quarter

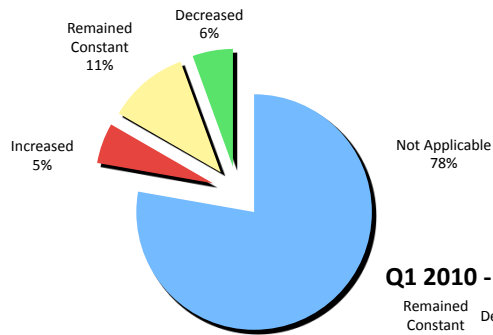
Q2 2010 - Overall Export Sales



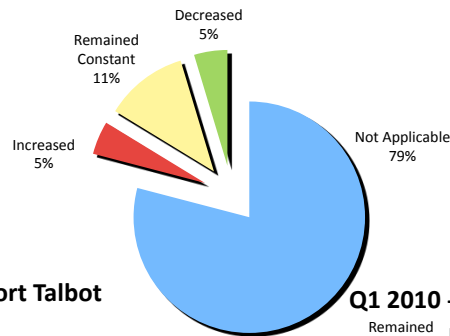
Q1 2010 - Overall Export Sales



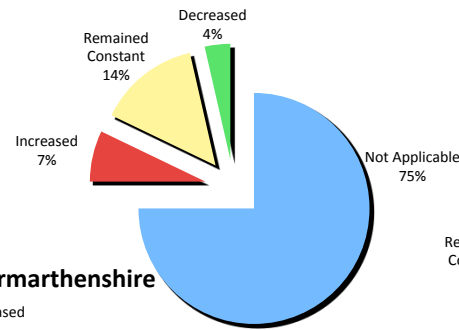
Q2 2010 - Neath Port Talbot



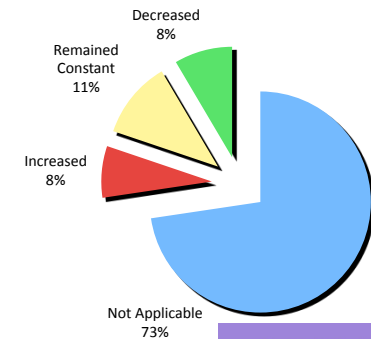
Q2 2010 - Carmarthenshire



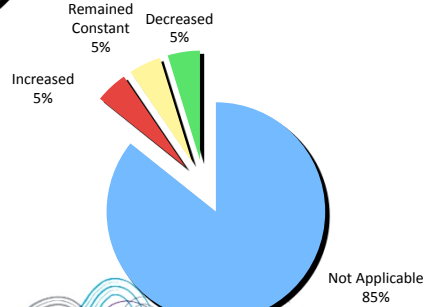
Q2 2010 - Swansea



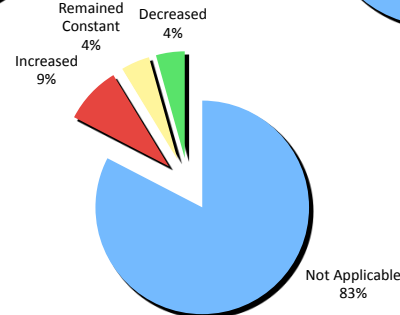
Q1 2010 - Swansea



Q1 2010 - Neath Port Talbot

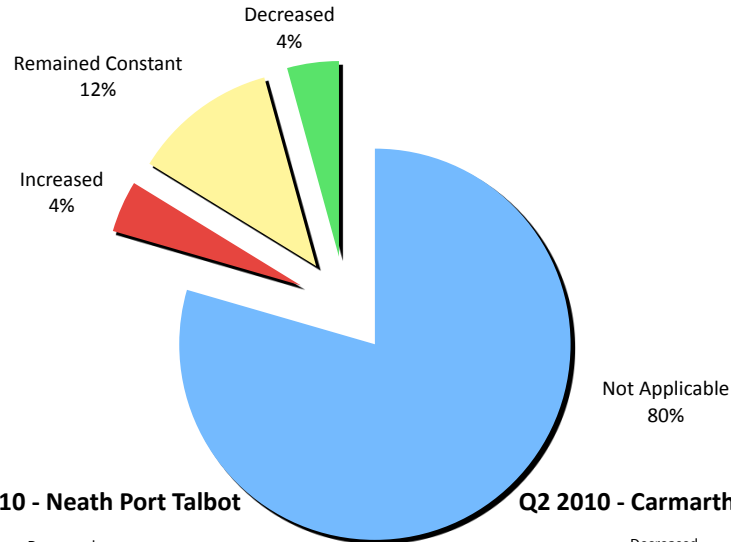


Q1 2010 - Carmarthenshire

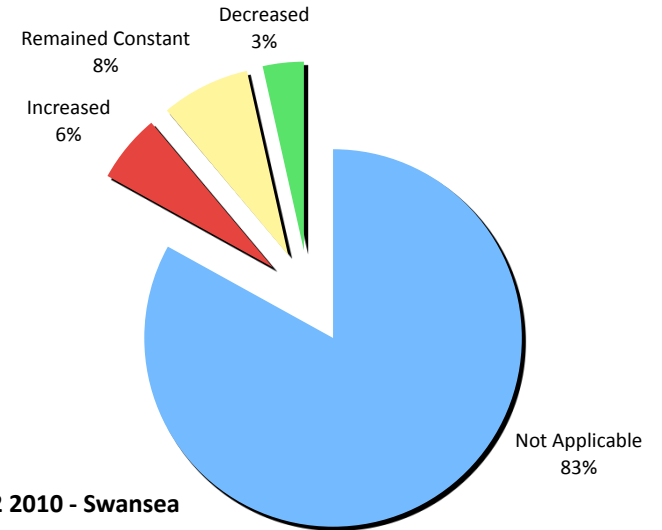


Export Orders - changes in the last quarter

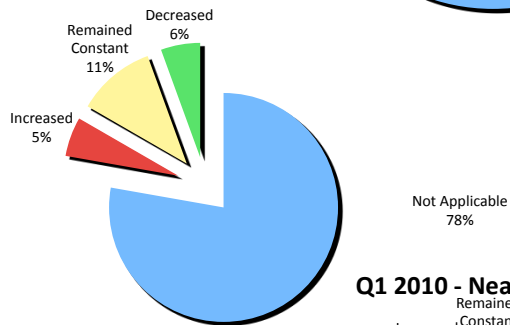
Q2 2010 - Overall Export Orders



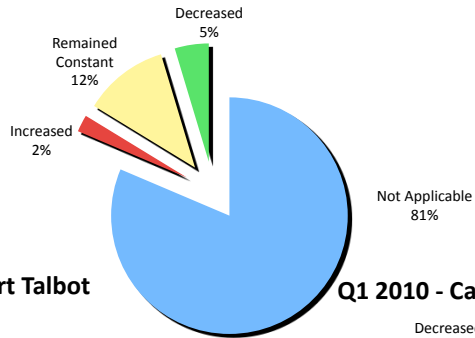
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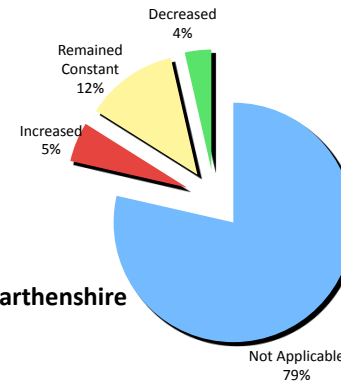
Q2 2010 - Neath Port Talbot



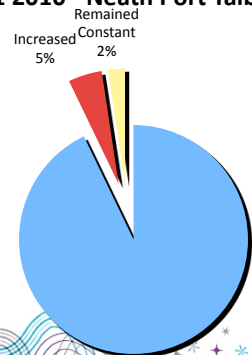
Q2 2010 - Carmarthenshire



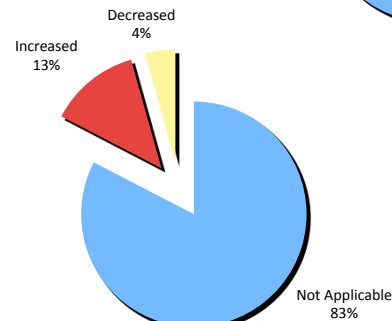
Q2 2010 - Swansea



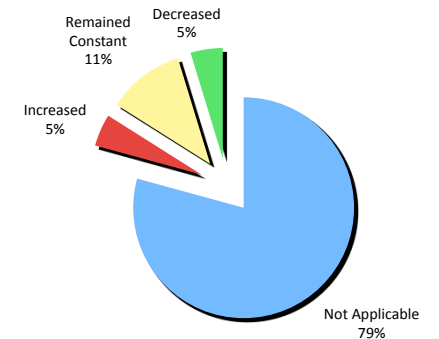
Q1 2010 - Neath Port Talbot



Q1 2010 - Carmarthenshire

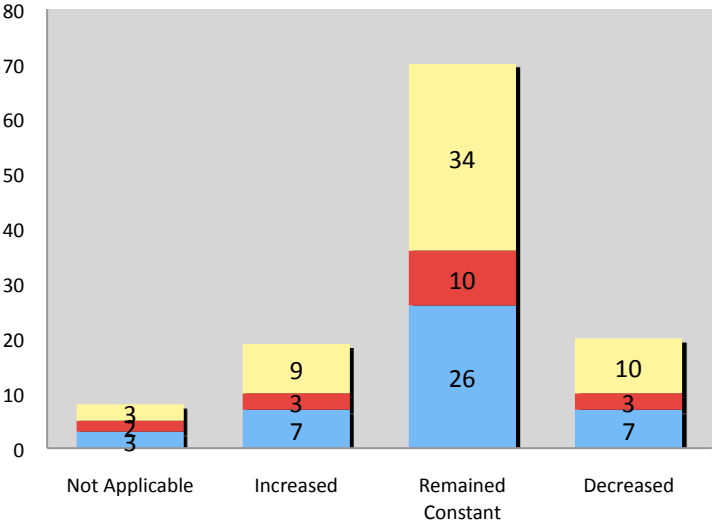


Q1 2010 - Swansea

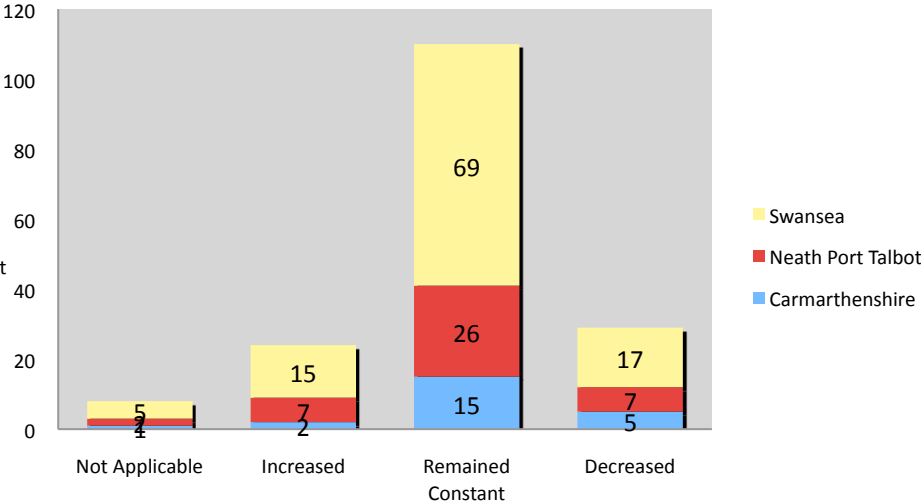


Workforce changes and expectations

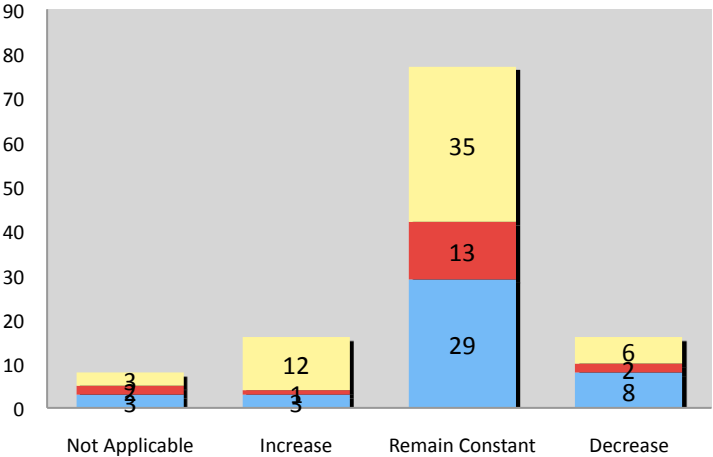
Q2 2010 - Workforce changes in past quarter



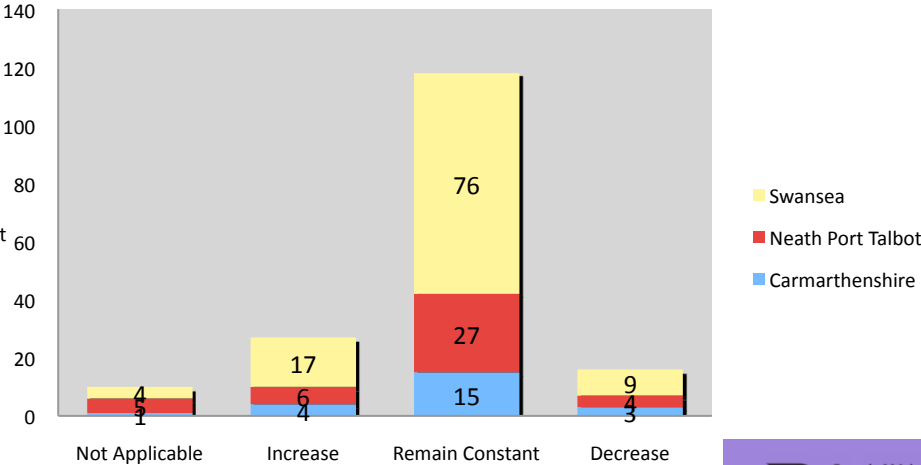
Q1 2010 - Workforce changes in past quarter



Q2 2010 - Workforce changes in next quarter

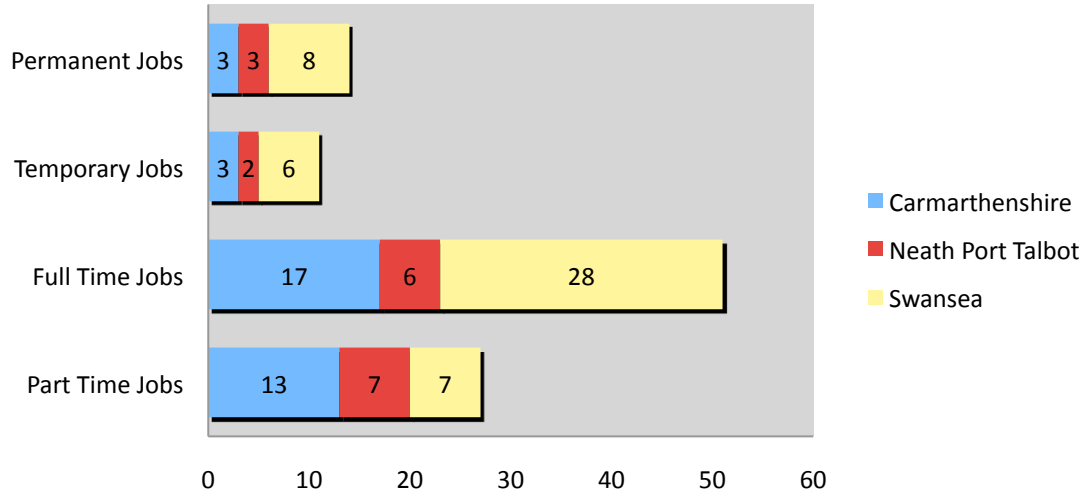


Q1 2010 - Workforce changes in next quarter

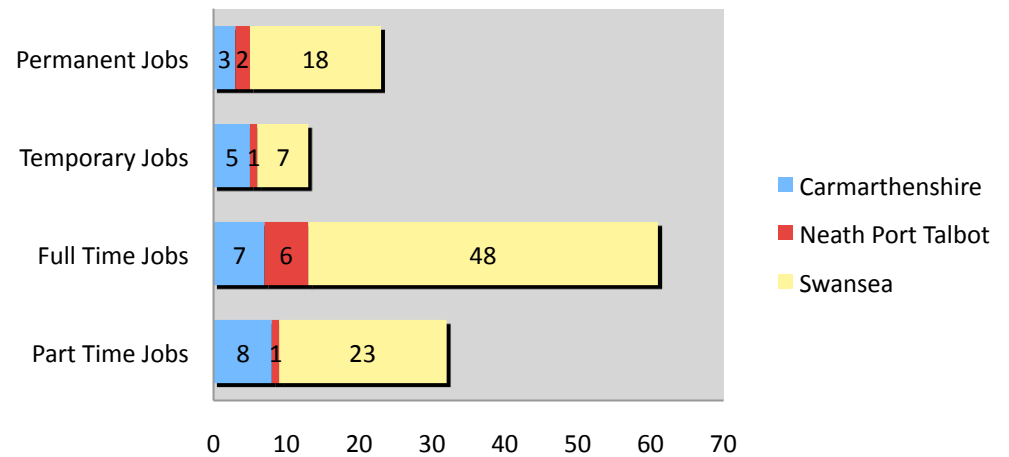


Staff recruitment

Q2 2010 - Types of staff attempted to recruit

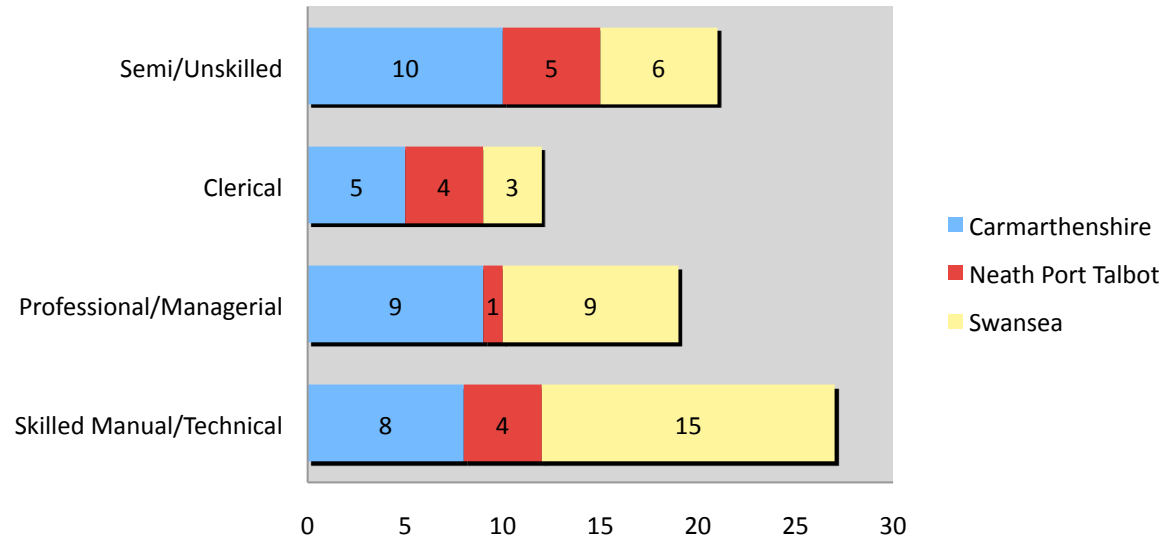


Q1 2010 - Types of staff attempted to recruit

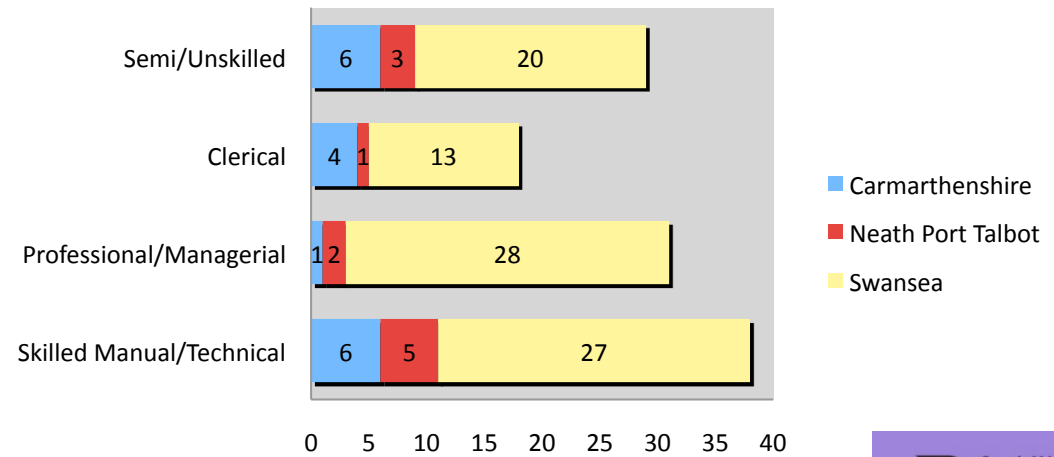


Difficulties in staff recruitment

Q2 2010 - Types of staff difficult to recruit

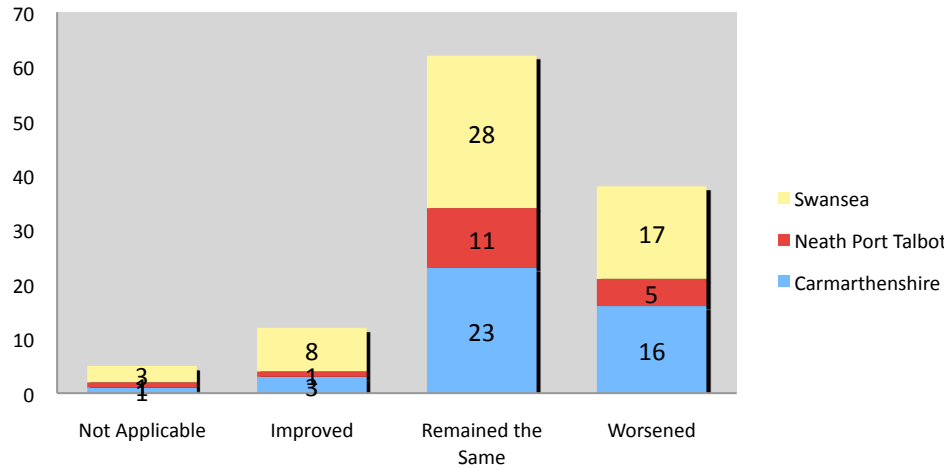


Q1 2010 - Types of staff difficult to recruit

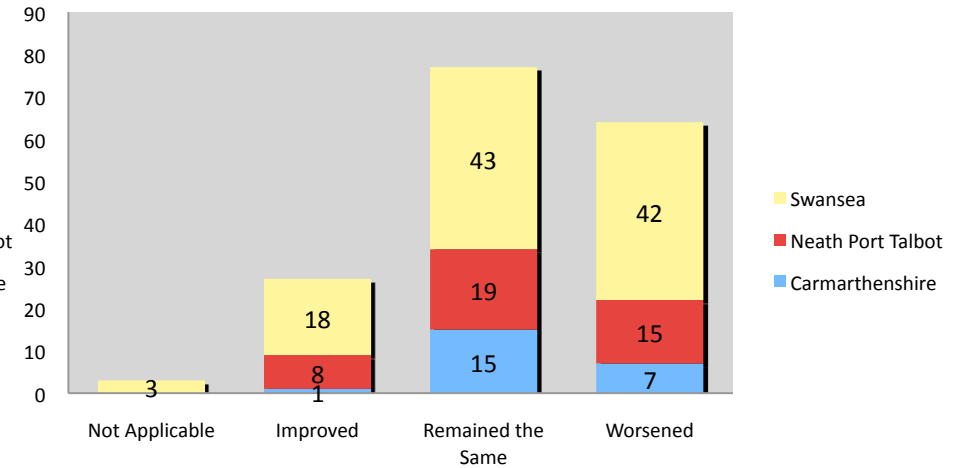


Cash flow & price changes and expectations

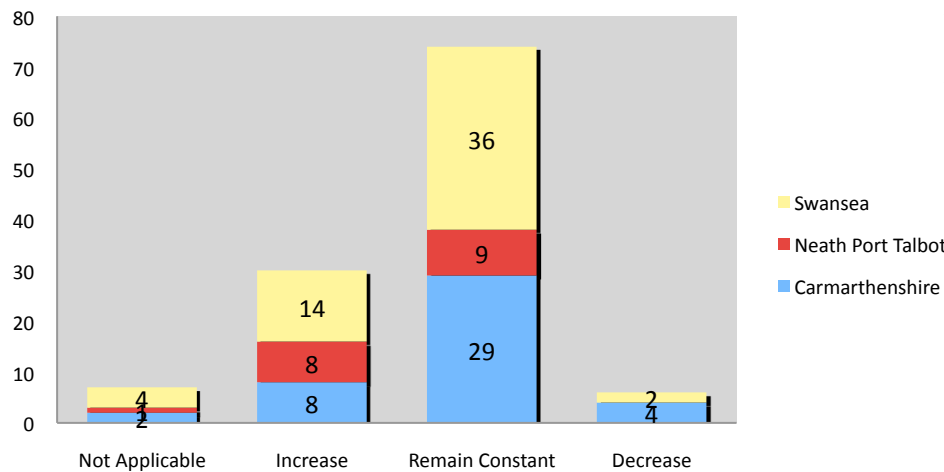
Q2 2010 - Changes in cashflow over previous quarter



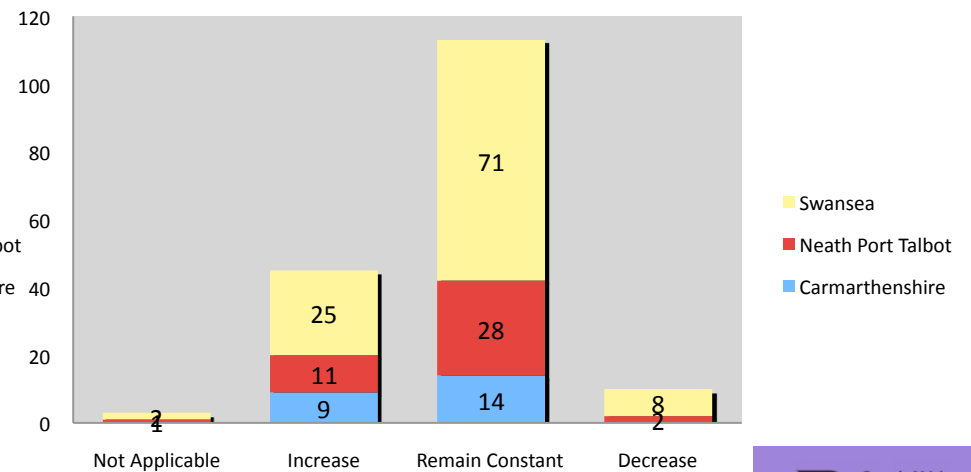
Q1 2010 - Changes in cashflow over previous quarter



Q2 2010 - Expectations for prices over next quarter

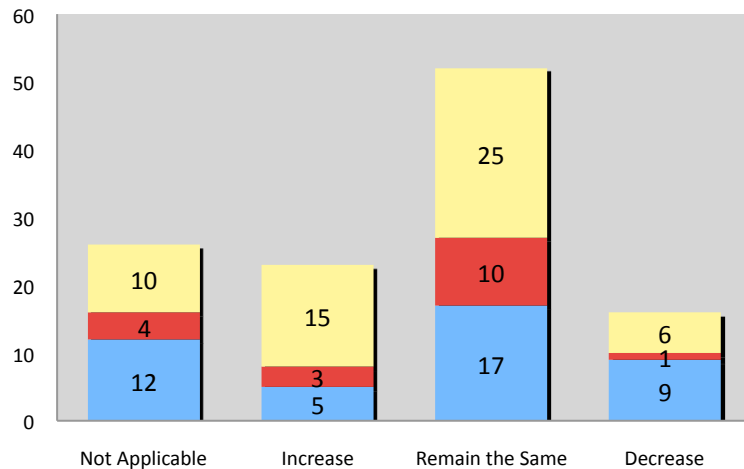


Q1 2010 - Expectations for prices over next quarter

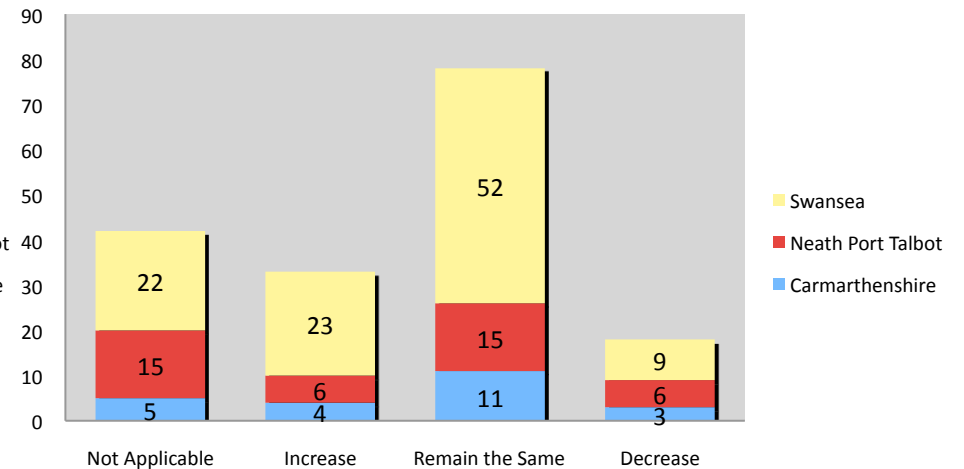


Investment in training & PME

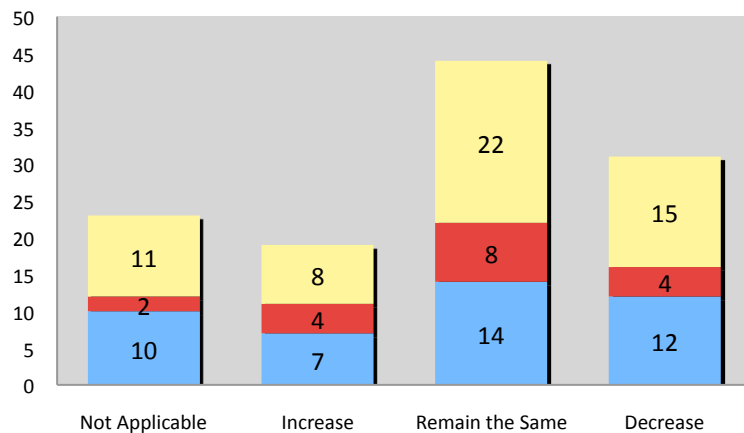
Q2 2010 - Plans for training in next quarter



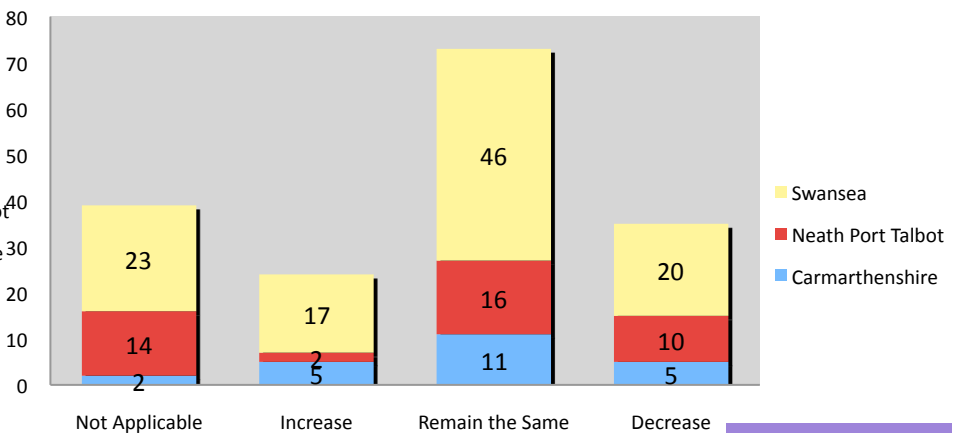
Q1 2010 - Plans for training in next quarter



Q2 2010 - Plant & equipment investment plans for next quarter

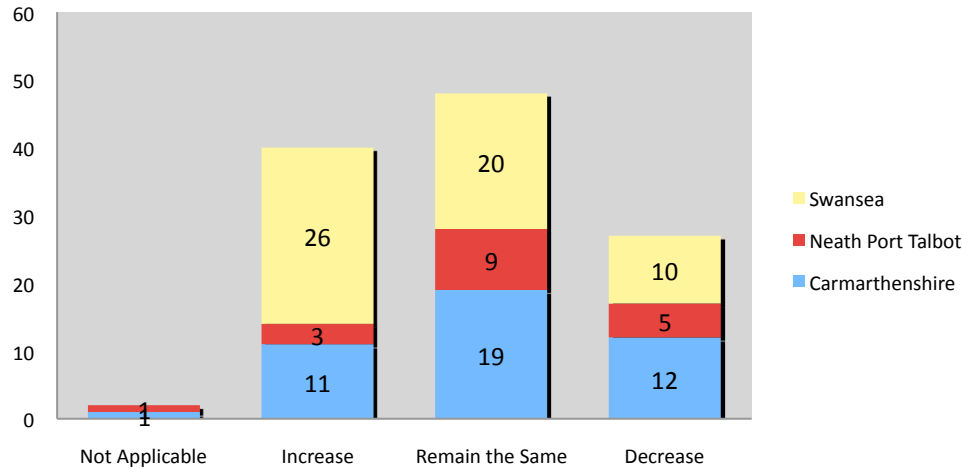


Q1 2010 - Plant & equipment investment plans for next quarter

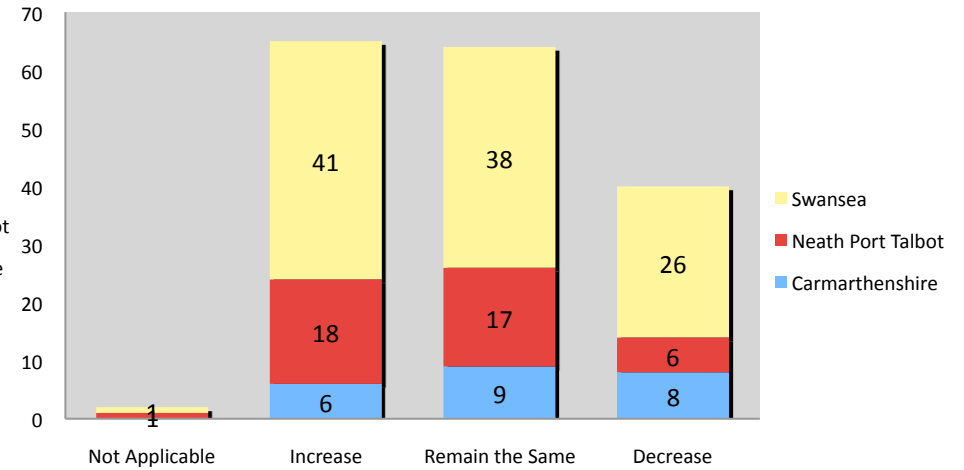


Business optimism - 12 month expectations

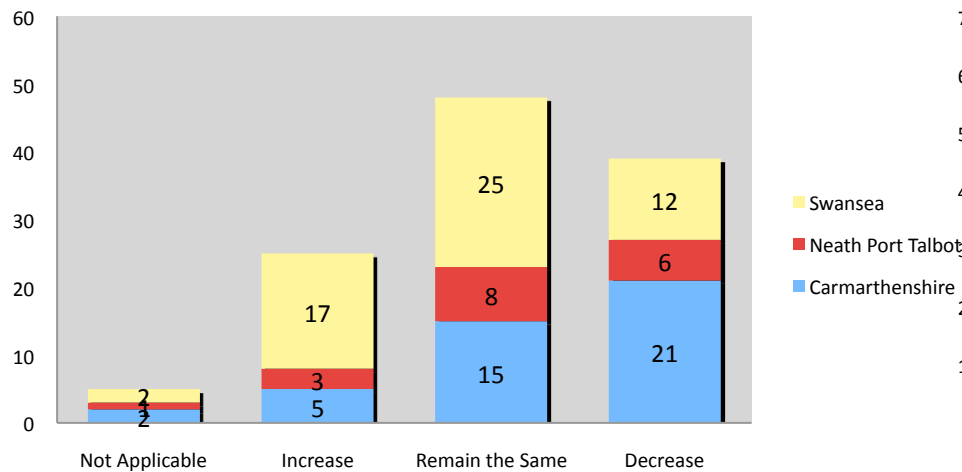
Q2 2010 - Turnover expectations in next quarter



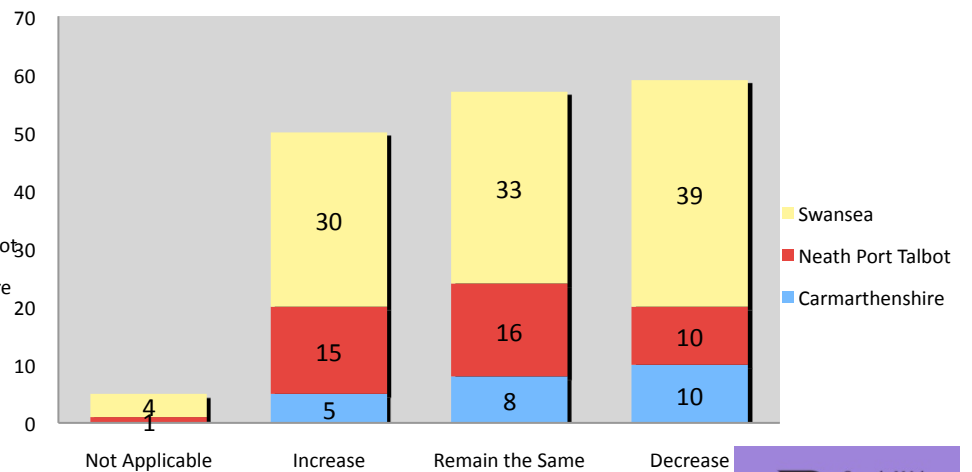
Q1 2010 - Turnover expectations in next quarter



Q2 2010 - Profitability expectations in next quarter

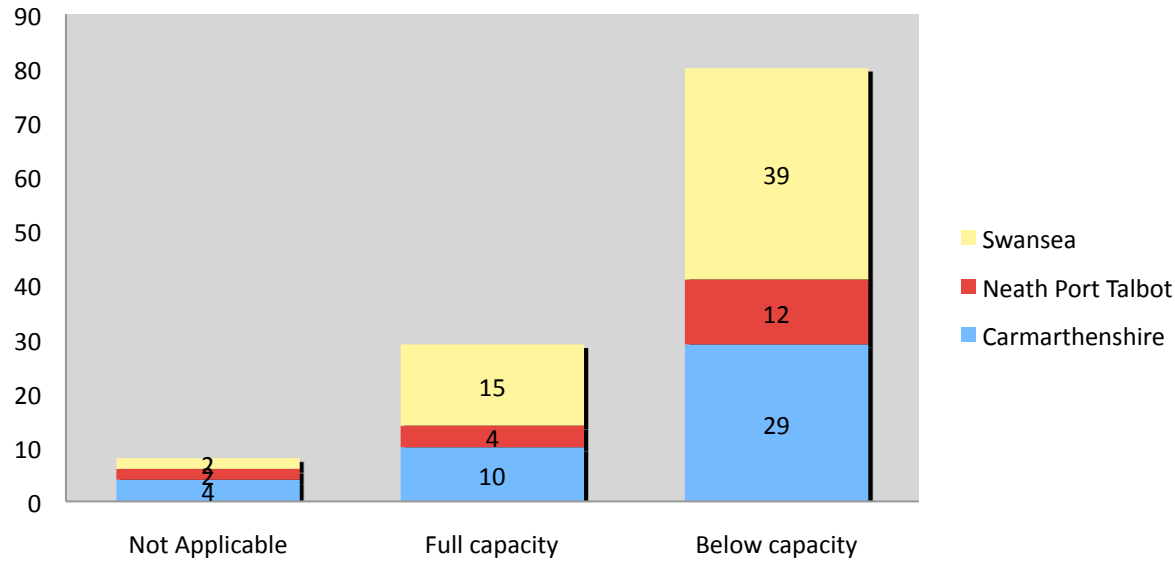


Q1 2010 - Profitability expectations in next quarter

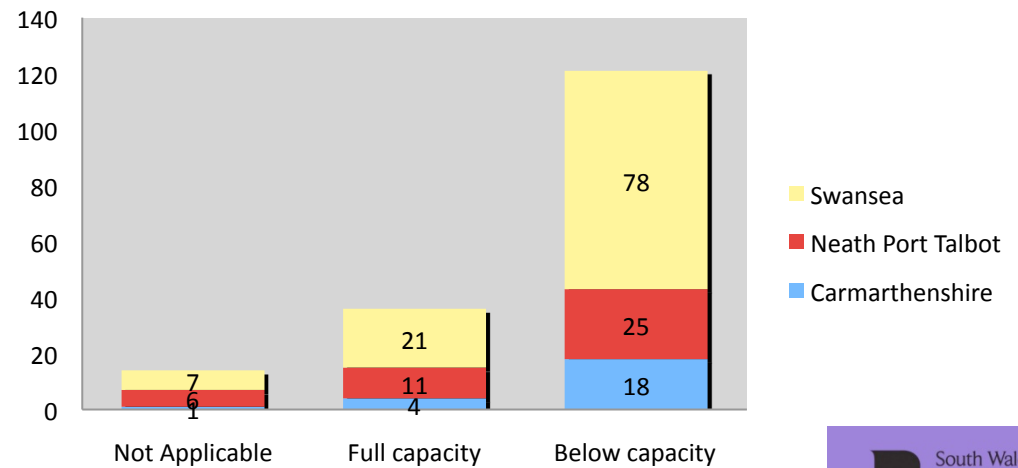


Operating at capacity

Q2 2010 - Operating at capacity

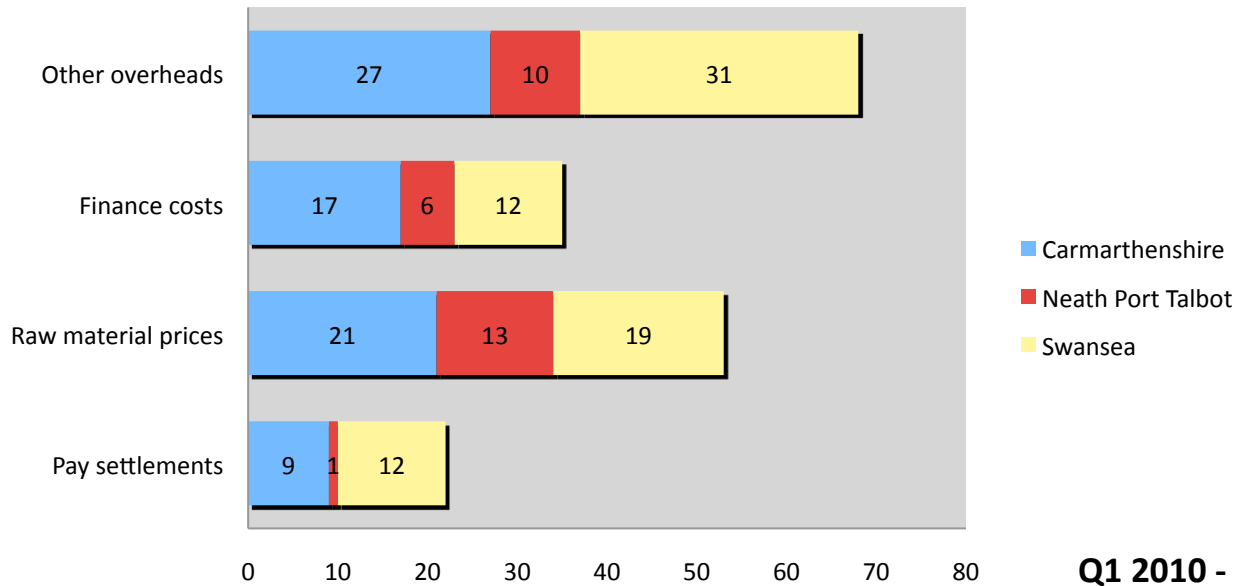


Q1 2010 - Operating at capacity

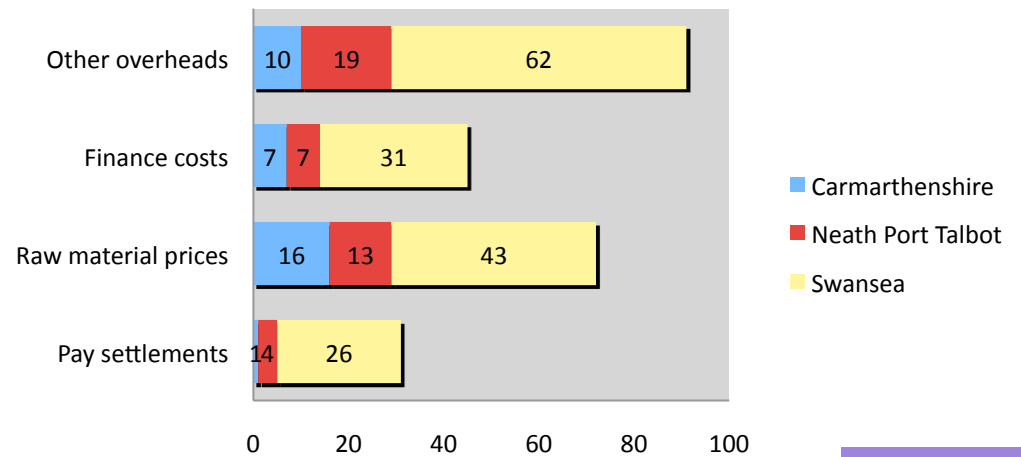


Pressures on businesses

Q2 2010 - Pressures on businesses

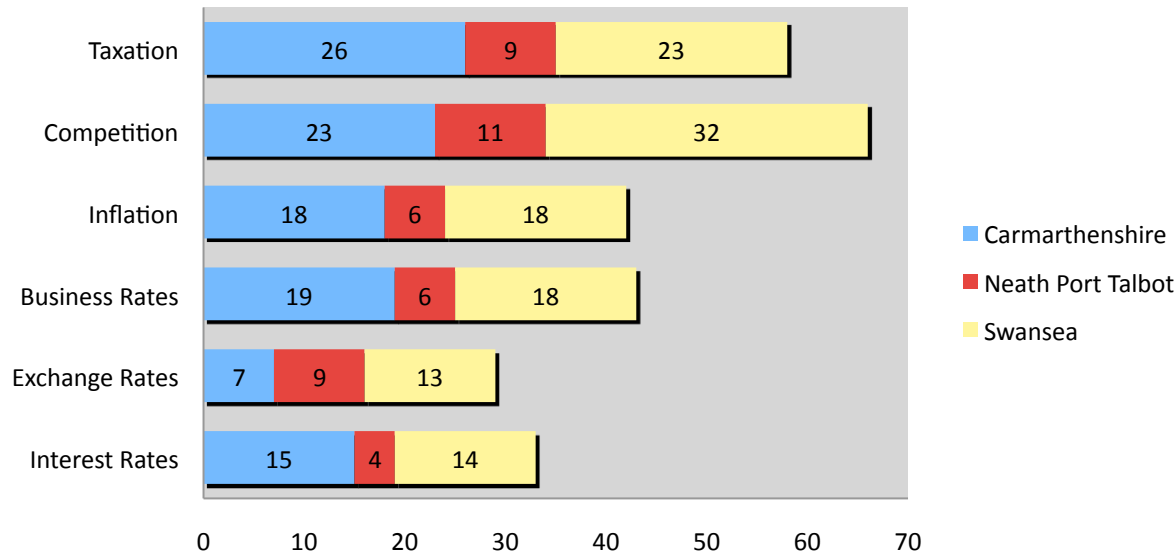


Q1 2010 - Pressures on businesses

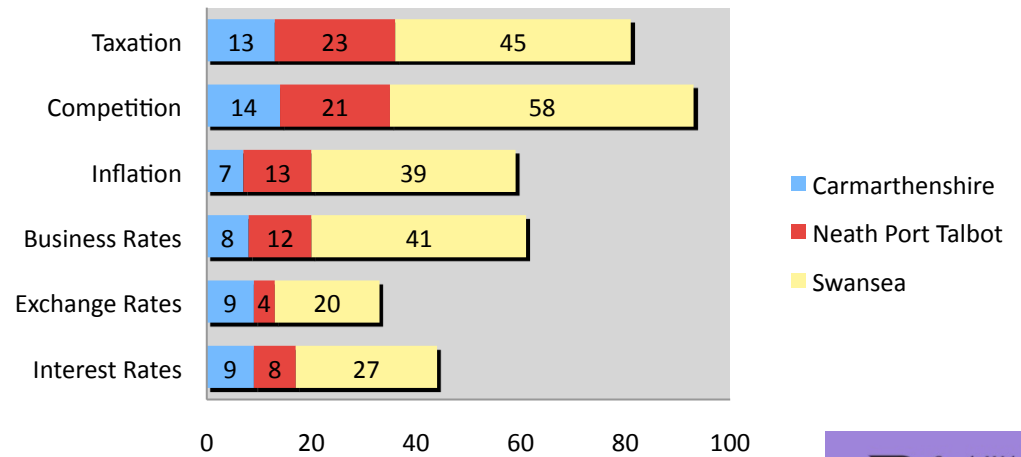


Business concerns

Q2 2010 - Concerns



Q1 2010 - Concerns



The South West Wales Quarterly Economic Survey Q2
2010 has been managed for South Wales Chamber of Commerce by The Third
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