

SEPTEMBER 2010



## PROFILE ILLAWARRA



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# State of the Region

## Highlights

- » Takings from tourist accommodation across the Illawarra Statistical District (ISD) increased by 3.3% to \$78.0 Million in the year to June 2010. Over the same period, estimated overall tourist expenditure in the Wollongong Statistical District strengthened to \$651.2 Million, a rise of 4.0%.
- » Illawarra businesses recorded improved trading conditions during the three months to September and anticipate enhanced conditions in the coming December quarter.
- » The volume of exports passing through Port Kembla Harbour increased by 5.6% over the year to June, to reach 18.2 Million tonnes. This was helped by strong growth in overseas exports of iron and steel products.
- » Average employment figures declined over the year to June 2010 with the unemployment rate increasing to 6.7% and the number of local persons employed falling to 179,200, down 4.8% on the year to June 2009.
- » The volume of full time jobs advertised in the Saturday edition of the Illawarra Mercury grew 18.4% over the year to June to 4,803. However, there was a 39.2% fall in the number of part time job ads to 1,268.
- » There was an improvement in the perceived financial position of local households. The *Current Financial Position Index* stood at 96 pts in the September quarter, which is a 3 pt gain from the June quarter.
- » The Wollongong Statistical District property market strengthened over the year to June. The median house price improved by 13.2% to \$419,000, the median price for units grew by 11.9% to \$332,250, and land lots recorded a median price of \$240,000, a rise of 6.7%.
- » During the twelve months to June, the volume of house sales in the WSD grew 5.3%, medium density property sales were up 11.4% and land lot sales increased by 59.6%.
- » The average number of rental listings in the Saturday edition of the Mercury fell 36.5% for houses and 20.5% for units in the year to June 2010. At the same time, the median weekly rental price rose 2.9% to \$360 for houses and 3.7% to \$280 for units.
- » The volume of dwelling approvals in the ISD increased during the twelve months to June. Medium density approvals surged 78.6% and house approvals grew by 18.8%. Growth in the quantity of approvals was recorded by Wollongong LGA, Shellharbour LGA, Kiama LGA and Shoalhaven LGA.

## Southern Mines Coal Production

Local coal production picked up during the June 2010 quarter:

- » Adjusted production increased to 3.7 Million tonnes, up 42.0% since March, and productivity grew 38.3% to 1.2 Thousand tonnes per person.
- » Average employment improved by 2.7% to 3,085 employees.

The annual results were also positive. Over the year to June 2010:

- » Adjusted production was up by 2.2% to 13.0 Million tonnes and average employment reached 2,981 persons (up 4.3%).
- » Meanwhile, productivity per employee dipped to 4.4 Thousand tonnes per person, down 2.1%.

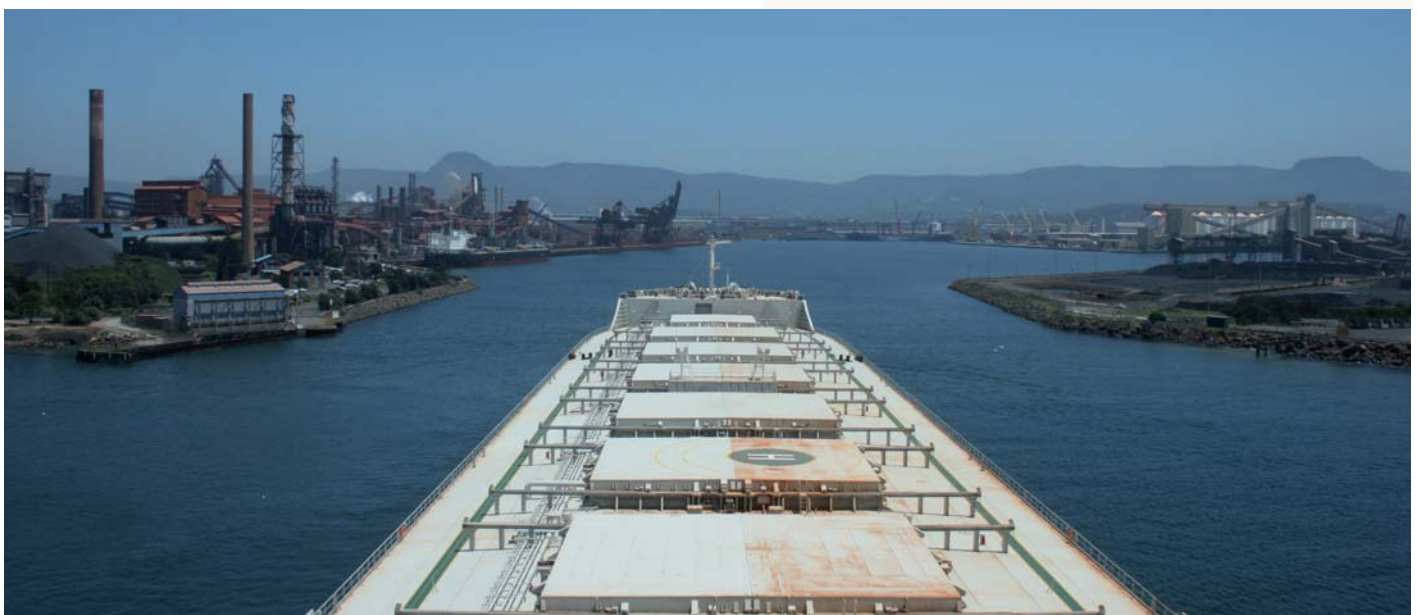
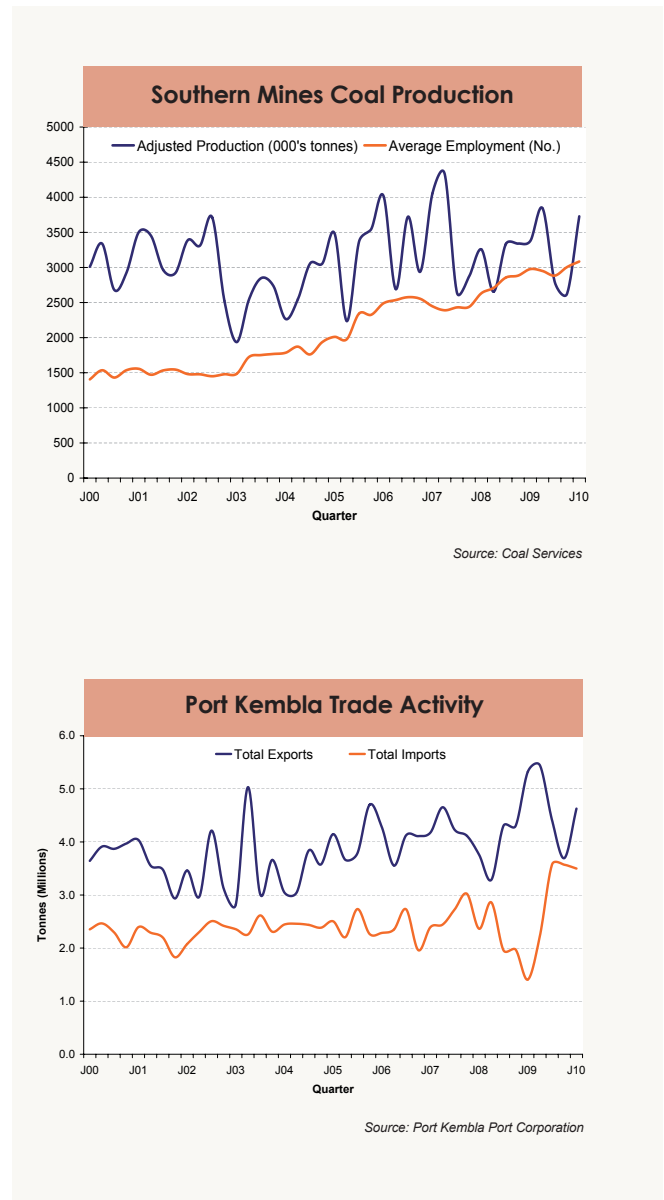
## Port Kembla Trade

The volume of trade passing through Port Kembla expanded over the year to June:

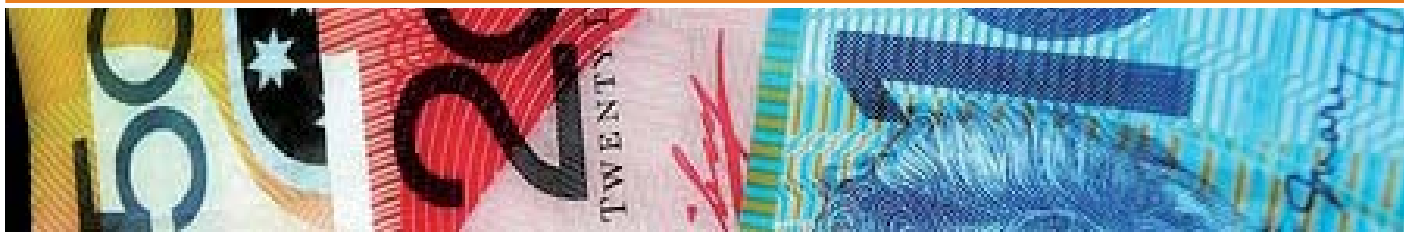
- » Exports increased by 5.6% to 18.2 Million tonnes with strong growth in overseas exports of iron and steel products (up 59.0%).
- » Import tonnage reached 12.9 Million tonnes, a rise of 57.1% compared to the 8.2 Million tonnes reported for the previous year.

There was an upsurge in the Illawarra region's trade activity during the June 2010 quarter:

- » There was a 25.3% gain in export levels, with total exports sitting at 4.6 Million tonnes.
- » Import tonnage decreased by a slight 2.0% to 3.5 Million tonnes, largely due to a 15.3% downturn in overseas imports to 1.6 Million tonnes.



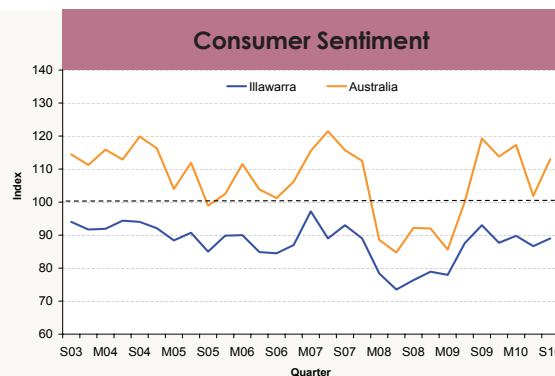
# Consumer Sentiment & Business Conditions



## Consumer Sentiment

Consumer confidence towards the current economic conditions in the Illawarra bounced back during the September 2010 quarter:

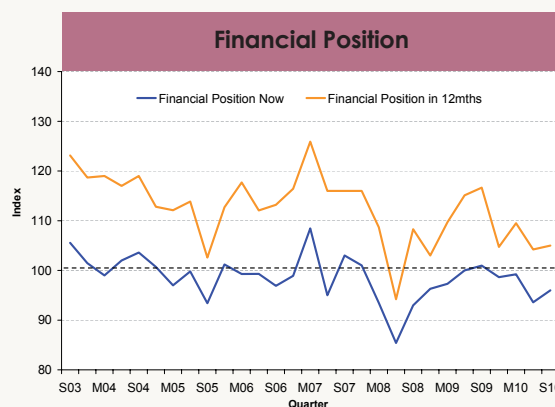
- » The *Illawarra Consumer Sentiment Index* strengthened by 2 pts to 89 pts overall.
- » This result is just 1 pt below the long term September quarter average of 90 pts.
- » Meanwhile Westpac's *Australian Consumer Sentiment Index* rebounded strongly, increasing 11 pts to 113 pts this quarter.
- » This is 4 pts above the nation's long term September quarter average.



## Financial Position

There was an improvement in the perceived financial position of Illawarra households since the June quarter. In the three months to September:

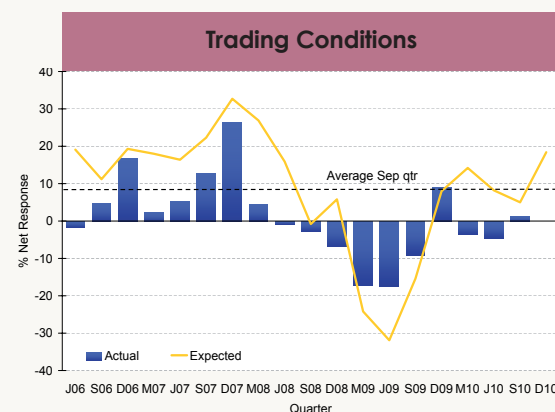
- » Confidence about household's current financial position stood at 96 pts, which is a 3 pt gain from the June quarter result, but 3 pts below the long term September quarter average of 99 pts.
- » The *Future Financial Position Index* rose slightly to 105 pts, up 1 pt from 104 pts in the June quarter.
- » The average level of the *Future Financial Position Index* during a September quarter is a much higher 113 pts.



## Trading Conditions

Local businesses experienced improving conditions during the three months to September 2010:

- » The *Trading Conditions Index* returned to positive territory in the third quarter of 2010.
- » A net 1.2% of businesses reported increased trade activity, which is a 5.8% pt turnaround from the June quarter result.
- » However, this continues to be below the long term September quarter average of net 8.9%.
- » The outlook for the December quarter is positive with a net 18.4% of Illawarra businesses anticipating stronger trading conditions.





# Labour Market



## Labour Market Statistics

The local employment situation was tougher in the year to June 2010 compared to the preceding 12 months:

- » The average yearly unemployment rate increased by 0.6% pts to 6.7% overall.
- » Youth unemployment in the Illawarra region increased to an average of 14.8% for the year, which represents a worsening of 2.5% pts.
- » The average number of persons employed declined to 179,200, a reduction of 8,900 jobs. This is down 4.8% on the year to June 2009.
- » The average labour force participation rate fell to 54.7%, representing a drop of 3.5% pts from 58.2%.
- » There was an average of 8,154 people receiving unemployment benefits in the year to June 2010, up 4.2% on the previous year.

There were encouraging results for the June quarter, however:

- » Average quarterly employment grew 3.4% over the three months to June to 187,600 persons, while the average participation rate increased 1.6% pts to 56.6%.
- » The average number of unemployment benefit recipients declined 10.2% to 7,350, down from 8,189 in the March quarter.

## Job Advertisements

There was encouraging growth in the number of local job advertisements published in the Saturday edition of the Illawarra Mercury during the June quarter:

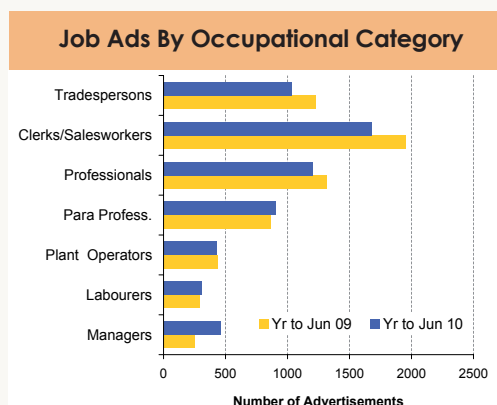
- » The volume of job advertisements increased by 31.7% to 1,571. There was a 28.8% gain in full time positions to 1,216 and a 41.1% rise in the number of part time positions to 347.

However, the strong quarterly June result was not enough to prevent an overall decrease in job ads over the year to June 2010:

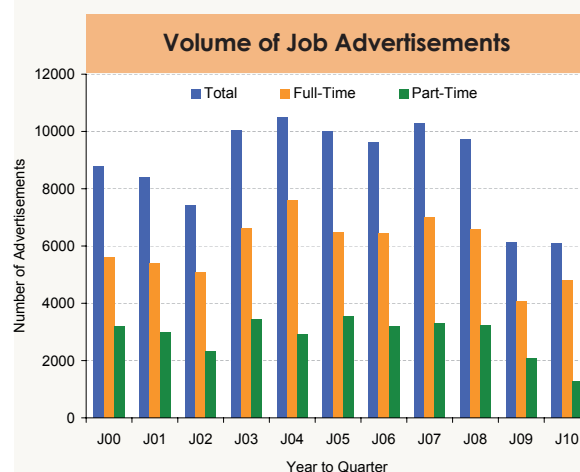
- » The volume of available positions advertised recorded a drop of 1.0%, comprised of a 18.4% rise in full time positions to 4,803 and a 39.2% fall in the number of part time positions to 1,268.
- » The number of advertised positions for managerial jobs recorded strong growth, up 78.6% to a total of 459 ads. Ads for labourers were up 7.6% and ads for para professionals reached 908 (up 5.1%).
- » Conversely, ad volumes fell for tradespersons (down 15.4% to 1,037), clerks/salesworkers (down 14.0% to 1,680), professionals (down 8.4% to 1,208) and plant operators (down 3.0% to 427).

	Yr to J09 (Ave.)	Yr to J10 (Ave.)
<b>ISD Labour Market Statistics</b>		
Employment (000's)	188.2	179.2
Unemployment Rate (%)	6.1	6.7
Participation Rate (%)	58.2	54.7
Youth Unemployment Rate (%)	12.3	14.8
Unemp. Benefit Recipients (No.)	7823	8154

Source: ABS Labour Force Survey



Source: IRIS Job Advertisement Series



Source: IRIS /Illawarra Mercury Job Advertisements Series

# Property



## Property Market (WSD)

The Wollongong Statistical District property market continued to strengthen during the year to June 2010:

- » The median house price improved by 13.2% to \$419,000, while the volume of sales grew 5.3% to 3,456.
- » Medium density property sales were up 11.4% to 1,748, while the median price for units improved by 11.9% to \$332,250.
- » Land lots recorded a median price of \$240,000, up 6.7%. The volume of land lot sales increased to 490, a rise of 59.6%.

There were mixed results for the WSD during the June 2010 quarter:

- » The median house price rose 1.2% to \$434,500 and the volume of sales increased marginally to 793, up 0.6%. The median unit price climbed 6.2% to \$345,000 with 365 properties sold (down 5.4%).
- » Price increases were experienced for houses in Wollongong LGA (up 3.0% to \$440,000) and Kiama LGA (up 3.6% to \$580,000). Shellharbour LGA recorded a 4.0% dip to \$360,000.
- » At the same time, Wollongong's median unit price rose 6.8% to \$349,900 and Shellharbour's median price climbed 9.7% to \$328,000. However, in Kiama LGA the median price fell 5.4% to \$349,000.
- » Looking at the volume of houses sold; Kiama was down 20.6% to 77 and Shellharbour was down 1.0%, but Wollongong improved by 5.5% to 517. For units, Kiama remained stable with 27 sales, Wollongong recorded a 5.4% decline to 297 and Shellharbour had 41 sales, down 8.9%.
- » For land lots, the median price fell 13.1% in Wollongong to \$232,500 with 46 sales. In Shellharbour there were 31 sales with a median price of \$235,000. In Kiama the median price was up 11.1% to \$300,000.

## Rental Market

The average number of weekly rental advertisements in the Saturday edition of the Illawarra Mercury fell in the year to June 2010:

- » The number of rental listings for houses declined 36.5% to an average of 33 ads per week, while for units it was 70 per week (down 20.5%).
- » The median weekly rental price for houses rose 2.9% to \$360 and the median weekly price for a unit was up 3.7% to \$280.

For the three months to June:

- » Rental unit listings dropped to 58 per week (down 6.5%) and there was an average of 28 house listings per week (down 6.7%).
- » The median weekly rental prices for houses and units increased to \$370 (up 2.8%) and \$297 (up 6.1%) respectively.

MEDIAN PROPERTY VALUES	Year to Jun 09 (\$)	Year to Jun 10 (\$)	Yearly Change (%)
<b>HOUSES</b>			
Wollongong Statistical District	370,000	419,000	13.2
Wollongong LGA	375,000	420,000	12.0
Shellharbour LGA	338,500	371,300	9.7
Kiama LGA	470,000	530,000	12.8
<b>UNITS/TOWNHOUSES</b>			
Wollongong Statistical District	297,000	332,250	11.9
Wollongong LGA	300,000	338,000	12.7
Shellharbour LGA	278,000	290,000	4.3
Kiama LGA	349,000	375,000	7.4
<b>LAND</b>			
Wollongong Statistical District	225,000	240,000	6.7
Wollongong LGA	240,000	254,975	6.2
Shellharbour LGA	210,000	229,000	9.0
Kiama LGA	246,250	260,500	5.8

Source: IRIS/Valuer General's Land and Housing Database

RENTAL MARKET VALUES	Year to Jun 09 (\$)	Year to Jun 10 (\$)	Yearly Change (%)
<b>HOUSES</b>			
Median Weekly Rental (\$)	350	360	2.9
Av. No. of Weekly Listings	52	33	-36.5
<b>UNITS - 1 Bedroom</b>			
Median Weekly Rental (\$)	170	180	5.9
Av. No. of Weekly Listings	14	11	-21.4
<b>UNITS - 2 Bedroom</b>			
Median Weekly Rental (\$)	250	275	10.0
Av. No. of Weekly Listings	42	38	-9.5
<b>UNITS - Total</b>			
Median Weekly Rental (\$)	270	280	3.7
Av. No. of Weekly Listings	88	70	-20.5

Source: Derived from the 'To Let' Section of Saturday Edition of the Illawarra Mercury

# Building Approvals



## Dwelling Approvals

The volume of dwelling approvals in the Illawarra Statistical District (ISD) increased during the twelve months to June:

- » Dwelling approvals grew by 34.4% to 1,850, driven by a surge of 78.6% in medium density housing approvals to 643 and an 18.8% boost to the quantity of house approvals to 1,207.
- » The number of approvals increased by 90.3% in Wollongong LGA to 689, by 73.9% in Shellharbour LGA to 346, by 66.7% in Kiama LGA to 40 and by 44.4% in Shoalhaven LGA to 628 approvals.
- » Wingecarribee LGA recorded 147 approvals, a 58.7% decline.

In quarterly terms, however, there was a decline in dwelling approvals across the ISD:

- » The total number of dwelling approvals dropped from 578 to 426, down 26.3%, with unit approvals falling 59.1% to 115. Meanwhile there were 311 house approvals (up 4.7%).
- » In the WSD, dwelling approvals dropped 45.8%, with Wollongong LGA experiencing a 55.7% decline to 129 approvals, Shellharbour recorded a 12.0% dip to 88 approvals and Kiama LGA was down 80.0% to just 3 approvals.
- » However, the Illawarra Balance recorded increases. The volume of approvals in Shoalhaven LGA grew 16.5% to 162 and in Wingecarribee LGA they rose to 44 approvals, up 33.3%.

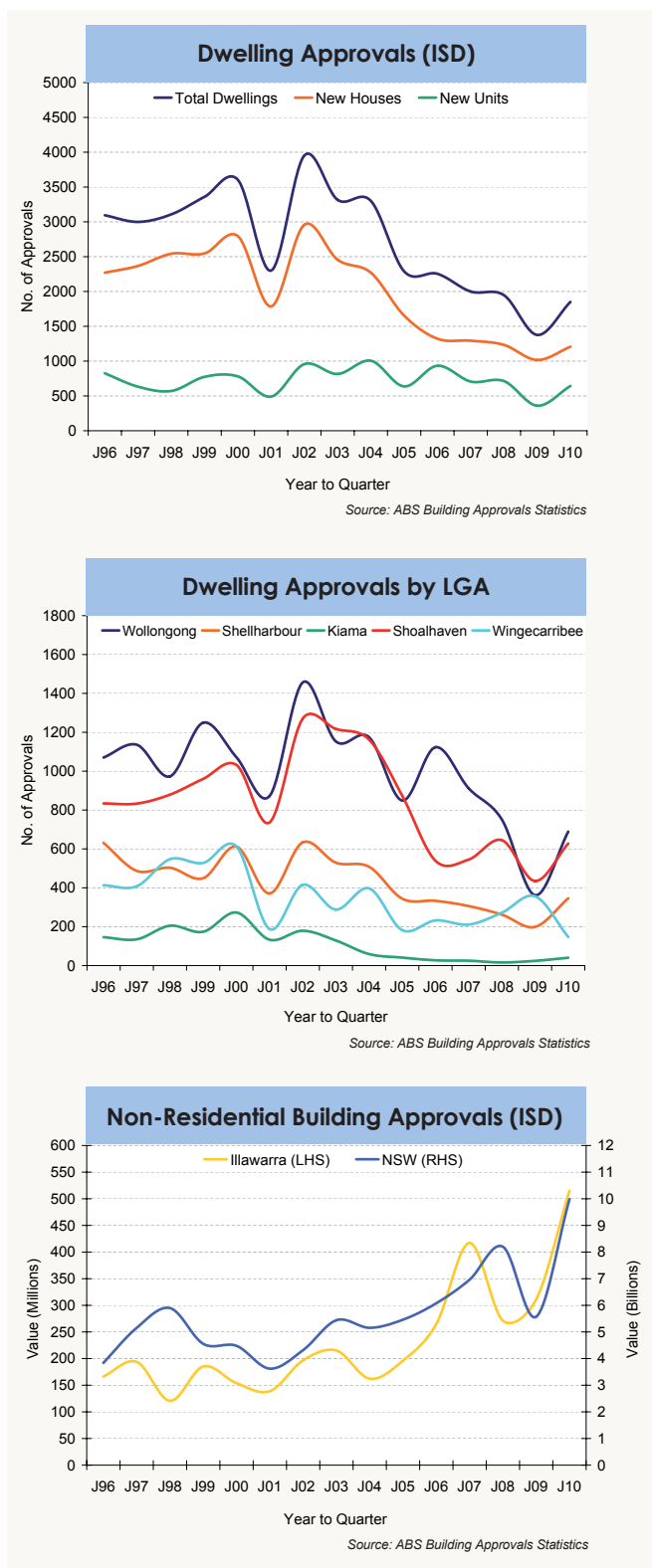
## Non-Residential Building Approvals

The value of non-residential building approvals in the Illawarra region strengthened during the year to June 2010:

- » The total value of commercial approvals in the ISD increased to \$515.2 Million, up 65.5% since the year to June 2009.
- » Non-residential investment in NSW recorded an increase of 79.2%, growing from \$5.6 Billion to \$10.0 Billion.

The strong growth seen in the March quarter was not maintained during the June 2010 quarter:

- » The value of non-residential construction approvals in the ISD declined by 65.1% to \$44.2 Million, down from \$126.4 Million.
- » Both public and private spending fell. Non-residential approvals in the public sector dropped by 74.4% to \$16.7 Million and approvals decreased by 55.1% to \$27.4 Million for the private sector.
- » New South Wales experienced a 38.2% increase to \$1.5 Billion.



# Tourism



## Tourism Activity (WSD)

Research by Tourism New South Wales has revealed that the number of visitors and visitor nights spent in the Wollongong Statistical District grew in the year to June 2010:

- » The number of domestic overnight visitor nights increased 1.1% to 2.3 Million, with the WSD receiving 4.9% of domestic overnight visitors in regional NSW. These travellers spent approximately \$127 per trip.
- » 50,800 international visitors stayed in the WSD for a collective 1.6 Million nights (up 9.1%) and spent an average of \$79 per night.
- » The region received 8.4% of international visitors to regional NSW and 15.8% of visitor nights.
- » The WSD received 2.9 Million domestic daytrippers (down 3.0%), with domestic day trip tourists spending an average of \$81 per trip (down 4.7%).
- » Nationally, the number of domestic day trips taken by Australians to regional NSW increased by 8.9% compared to last year and the WSD accounted for 9.2% of day trips to regional NSW.

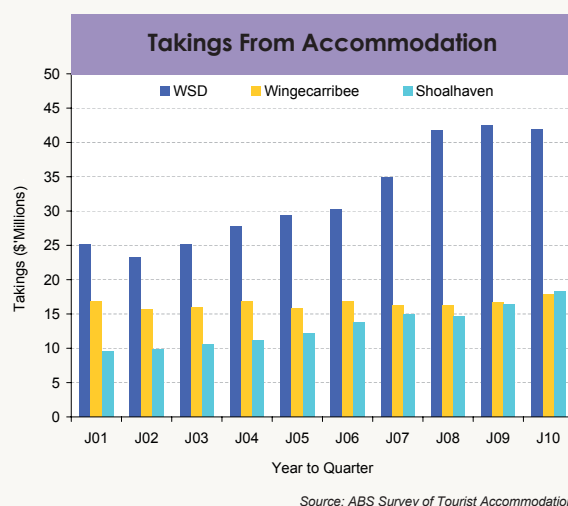
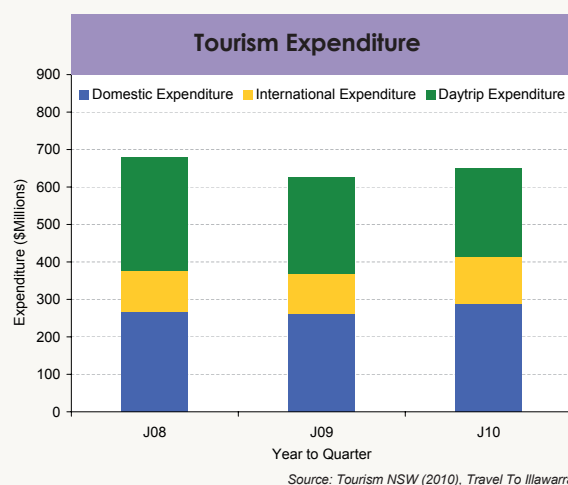
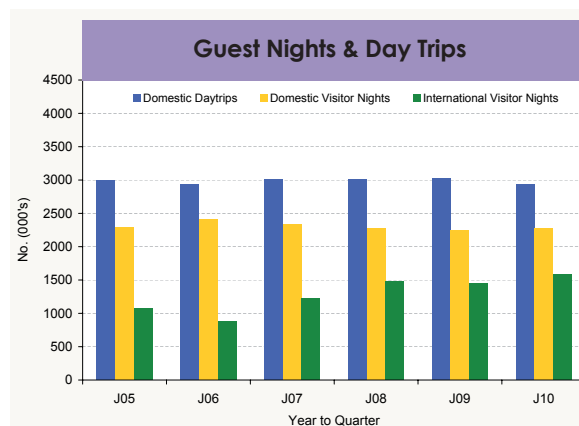
Estimated tourist expenditure in the WSD strengthened overall to \$651.2 Million, a rise of 4.0% or \$24.8 Million.

- » Expenditure by international overnight tourists grew to \$125.1 Million, up 14.9% since the year to June 2009.
- » Domestic overnight tourists expenditure increased by 10.7% (\$27.9 Million) to \$288.8 Million.
- » Conversely, expenditure by domestic daytrip travellers weakened by 7.5% to \$237.3 Million, down from \$256.7 Million in the previous year.

## Accommodation Takings (ISD)

Takings from tourist accommodation across the Illawarra Statistical District increased by 3.3% to \$78.0 Million in the year to June 2010:

- » Accommodation revenue in the WSD decreased by 1.4% to \$41.9 Million, compared to the takings during the year to June 2009 of \$42.5 Million.
- » Accommodation takings recorded a decline of 3.5% in the Wollongong LGA at \$30.8 Million.
- » Takings in the Shoalhaven LGA surged 12.0% to \$18.3 Million, which amounts to a \$2.0 Million rise.
- » Wingecarribee LGA recorded a 6.8% rise in accommodation takings to \$17.8 Million.







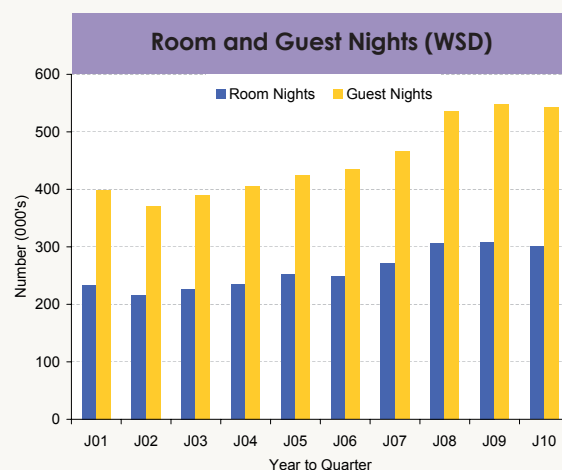
## Wollongong Statistical District

The tourist accommodation sector in the Wollongong Statistical District experienced a decline in the year to June 2010:

- » Room nights fell 2.6% to 300,842, a downturn of 8,034 nights.
- » Guest nights recorded a decrease to 542,405 nights, down 0.9% from 547,299 in the year to June 2009.

The quarterly figures also revealed a decline in the WSD. Compared to the June 2009 quarter:

- » Room nights were down by 2.0% to 69,629.
- » Guest nights weakened to 117,110 for the June 2010 quarter, down 4.0%.



Source: ABS Survey of Tourist Accommodation

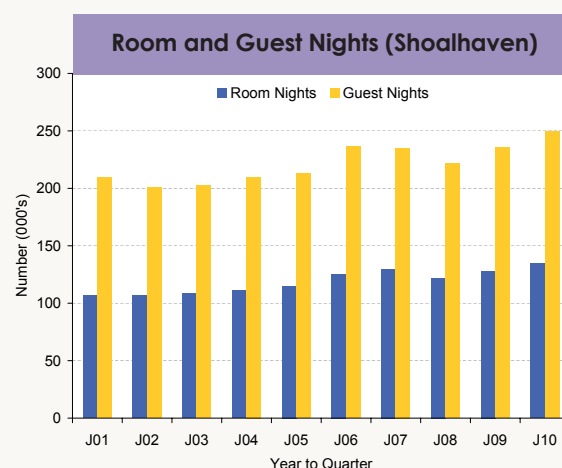
## Shoalhaven

Shoalhaven LGA's accommodation industry recorded positive results for the twelve months to June 2010:

- » There were 134,480 room nights recorded, which is an increase of 5.0% from 128,076 in the year to June 2009.
- » Guest nights improved by 6.0% to 249,747, an increase of 14,104 nights.

When comparing the June 2009 quarter with the June 2010 quarter, the Shoalhaven recorded mixed results:

- » Room nights increased to 29,989, up 1.9%, with an additional 563 nights.
- » Guest nights dipped by 0.4% to 54,393, down from 54,592 nights.



Source: ABS Survey of Tourist Accommodation

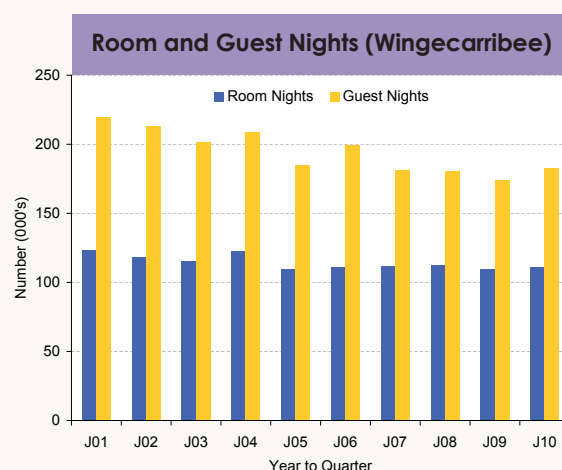
## Wingecarribee

Wingecarribee LGA recorded growth in the number of visitors staying in the year to June 2010:

- » There was a 1.2% increase in room nights to 110,927, up from 109,638 nights in the year to June 2009.
- » The number of guest nights improved by 4.8% to 182,502.

When comparing the results from the current June quarter with the June 2009 quarter:

- » Room nights grew by 14.0% to total 29,449, up 3,613 nights.
- » Guest nights rose 11.7% reaching 46,055 nights from 41,227 in the June 2009 quarter.



Source: ABS Survey of Tourist Accommodation

# Investment



The following list represents the majority of large developments (\$1M and over) taking place in the region up to the date of publishing. Those developments that have been approved to be built are indicated by an 'A', a project which has been completed in the current quarter is indicated by a 'C' and those currently under construction or have had their construction certificates approved are indicated by a 'U/C'. (A full list of current and recently completed projects is available by contacting IRIS Research).

## Infrastructure and Public Utilities

Organisation	Development	Status	Value
South Eastern Sydney - Illawarra Area Health Service	Wollongong - Psychiatric emergency care unit	U/C	\$5.5M
	Shellharbour - Shellharbour Hospital Renal Unit for Dialysis	U/C	\$4.5M
	Shellharbour - Child and Adolescent Inpatient Unit	U/C	\$4.4M
NSW Public Works	Bulli - High school gymnasium and basketball court	C	\$2.7M
	South Nowra - South Coast Correctional Centre	U/C	\$122.0M
	Various - Schools science facility upgrades	U/C	\$11.7M
	Shellharbour - TAFE Child Studies & Childcare Centre	U/C	\$5.1M
	Wollongong - TAFE blocks refurbishment	U/C	\$3.9M
	Wollongong - Wollongong Performing Arts New Performance Venue	U/C	\$3.5M
	Wollongong - Illawarra Sports High School sporting facilities upgrade	U/C	\$1.3M
The University Of Wollongong	Building 40 Performance Space Refurbishment	C	\$2.0M
	SMART Infrastructure Building	U/C	\$40.0M
	P&DII Building	U/C	\$33.0M
	Enterprise 1 Building	U/C	\$31.3M
	Building 24	U/C	\$10.0M
	UniCentre Refurbishment	U/C	\$6.8M
Roads and Traffic Authority	Main Road 92 - Nowra to Nerriga	U/C	\$95.0M
	South Nowra - King Horne to Forest Road	U/C	\$67.0M
	Picton Road - Road Safety Strategy	U/C	\$40.7M
	Kings Highway - Road Safety Improvements	U/C	\$26.0M
	Bulli - Improvements at Princes Highway/Lawrence Hargrave Drive Intersection	U/C	\$31.0M
	Figtree - Major intersection improvements at Princes Highway	U/C	\$15.0M
Department of Housing	Unanderra - 14 x 1 br - pensioner housing	U/C	\$2.7M
	Warilla - 6 x 2 br - general housing	U/C	\$1.2M
	Primbee - 3 x 2 br and 2 x 3 br - general housing	U/C	\$1.4M
	Fairy Meadow - 16 x 1 br and 10 x 2 br - pensioner housing	U/C	\$6.1M
	Corrimal - 19 x 1 br and 14 x 2 br - pensioner housing	A	\$7.7M
	Wollongong - 28 x 1 br and 12 x 2 br - pensioner housing	A	\$9.4M

## Industrial and Commercial

Organisation/Area	Development	Status	Value
Shellharbour LGA	Oak Flats - Construction of a new Police Station for Lake Illawarra Local Area Command	U/C	\$10.6M
	Albion Park Rail - Demolition, construct Aldi store, 3 retail shops & 7 residential allotments	U/C	\$4.5M
	Shellharbour City Centre - Church and hall including facilities	U/C	\$4.0M
	Shellharbour - Alterations and additions to existing Shellharbour Workers Club	A	\$3.0M
	Shellharbour - Demolish grandstand and construct grandstand and amenities	A	\$1.2M
Shoalhaven LGA	Nowra - 98 suite hotel and associated facilities	U/C	\$16.5M
	Yerrilyong - Aircraft hangars, workshops, office building and car parking	U/C	\$2.8M
	Manyana - Supermarket, retail shops, professional suites and associated car parking	A	\$3.3M
	Bomaderry - Fast food outlet, car parking and associated signage	A	\$1.5M
	Milton - Masterplan for Seniors Living Development	Lodged	\$93M
Wollongong LGA	Port Kembla - Construction of Illawarra Cogenerational Power Plant	U/C	\$385.0M
	Port Kembla - Sinter Plant Ore Preparation Upgrade	U/C	\$85.0M
	Wollongong - Replacement of cycle path from Brighton Lawn to Continental Baths	U/C	\$5.0M
	Wollongong - Construction of 13 storey commercial development	A	\$31.5M
	Unanderra - Nan Tien Educational and Cultural Facilities	A	\$26.0M
	Stanwell Tops - Demolition of existing structures and installation of swimming pool	A	\$5.0M
	Wollongong - Alterations to existing David Jones store	A	\$2.9M
Wingecarribee LGA	Robertson - Sewerage treatment plant	A	\$17.5M
	Bowral - Mixed use development, 7 retail units, 52 home units & basement parking	A	\$11.0M
	Mittagong - Water Reservoir	A	\$4.3M
	Sutton Forest - Refurbishment of hotel and motel units	A	\$10.0M

## Residential

Organisation/ Area	Development	Status	Value
Wollongong LGA	Fairy Meadow - Demolition of a motel and construction of apartment buildings	U/C	\$14.0M
	Horsley - Construction of a 90 bed residential care facility	U/C	\$10.5M
	Woonona - Construction of 19 houses and 26 lot torrens title subdivision	U/C	\$4.5M
	Figtree - 'Hillside at Figtree' construction of a 66 bed residential care facility	U/C	\$4.4M
	Keiraville - Construction of student accommodation building	A	\$38.4M
	Woonona - 'Edgewood Estate' construction of 32 attached houses & 33 torrens title lots	A	\$5.0M
Kiama LGA	Kiama - Demolish motel & construction of 9 residential units & 2 serviced apartments	A	\$2.9M
	Kiama - Seniors living development - 52 villas, community facility and carparking	A	\$2.8M
Shellharbour LGA	Albion Park - 'Tullimbar Village' 1300 homes & 300 units, town centre & commercial	U/C	\$550.0M
	South Nowra - 'Peppermint Grove' 200 lot residential subdivision. Stage 3	U/C	\$26.0M
	Shellharbour/Shell Cove - 83 lot torrens subdivision	U/C	\$6.0M
	Albion Park - 4 townhouses and 6 villas with garages	U/C	\$1.5M
	Flinders - Construction of 10 lot torrens subdivision, 2 exhibition homes and car park	U/C	\$1.1M
	Albion Park Rail - Demolish existing structures and construct 4 townhouses & 4 villas	A	\$1.6M
Shoalhaven LGA	Bawley Point - New rural dwelling	U/C	\$1.1M
	Sussex Inlet - 43 medium density units	A	\$3.4M
Wingecarribee LGA	Burradoo - Seniors Living 53 dwellings	U/C	\$13.0M

# About IRIS

## Profile Illawarra

Profile Illawarra is a quarterly economic review of the Illawarra region providing an up to date summary of economic performance and development in the region.

## Real Estate Report

A quarterly report on market activity in the Wollongong, Shellharbour, Kiama, Shoalhaven and Wingecarribee areas.

## Consumer Sentiment Monitor

A quarterly update of consumer sentiment and spending patterns in the Illawarra Region.

## Illawarra Business Survey

A quarterly report on performance and expectations of local business for the coming quarter. Analysis is presented by organisational size and industry.

## Statistical Guide to the Illawarra

Updated annually, this is an easy to use, pocket sized pamphlet that covers a wide variety of interesting data.



When we commenced operations in 1980, IRIS was Australia's first computer based information service. Since that time we have developed a number of sophisticated research techniques and services that permit us to provide the highest level of information quality and research to business, government and community organisations. Our diverse range of research capabilities and specialisations include:

### Capabilities

- » Computer aided telephone interviewing incorporating audio facilities
- » Web/online surveys
- » Household interviewing
- » Mall intercepts
- » Audits and observational studies including mystery shopping
- » Data mining
- » Statistical/multivariate analysis and modelling
- » Focus groups
- » Workshop facilitation

### Specialisations

- » Community usage and attitudes
- » Customer satisfaction
- » Advertising and brand tracking
- » Local government
- » Corporate image and identity studies
- » Finance and banking
- » Media
- » Business to business
- » Staff opinion surveys
- » Public opinion polling
- » Tourism
- » Health and medical
- » Service and program evaluation

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ACN 002 278 793

ABN 16 002 278 793

### Report Notes

The Profile Illawarra Report is produced quarterly by IRIS as an indicator of the regional economy. Information is based on data sourced from ABS publications, State Government, regional commercial and industrial establishments and from the IRIS database.

### IRIS is sponsored by:



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