Institute of Certified Bookkeepers
Making you count

ICB Annual Survey 2016





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ICB 2016 Survey Results Commentary

2016 Annual Survey
818 Responses
- Bookkeepers in Business – 674 Responses
- Bookkeepers in Employment – 144 Responses
-

2015 Annual Survey
559 Responses
- Bookkeepers in Business – 470 Responses
- Bookkeepers in Employment – 89 Responses

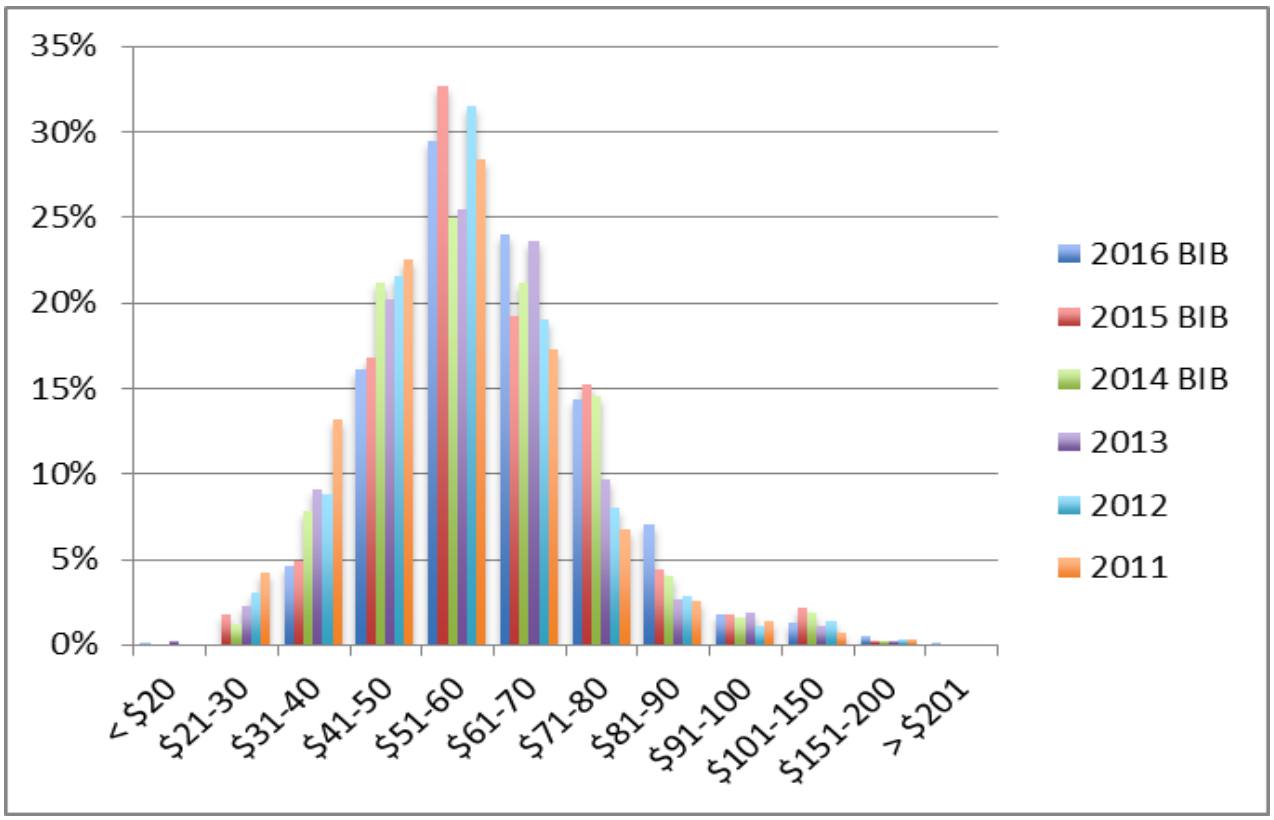
What does a Typical 2016 Bookkeeper look like?

- 86% of respondents are female
- 46% are sole traders but there is an increase up to 38% for people who own a bookkeeping business
- 78% are based within 100km of a capital city
- Most are likely to hold multiple partnerships with other organisations such as MYOB, Reckon, QBO and Xero; 9% are also members of an accounting association
- 70% use Facebook and 47% use LinkedIn as their social media platforms
- The majority work 31-40 hours per week ordinarily, and most people work 5-10% more hours during BAS periods
- Has been in business for over 8 years, with many also having been in business for over 16 years
- The majority have between 5 to 20 business clients
- Most are actively looking for more clients
- 70% use the BAS or business portal
- Most help is received from ICB website, ATO website, software companies and ICB support

The Population

- 85% are ICB members
- 22-24% of the population is in each of NSW, VIC and QLD
- This year's survey results are again influenced by 11% of responses from employee bookkeepers only working for the one business, the same as 2015.
- 50% engage 1 to 3 bookkeepers as employees; 12% engage 1 to 3 bookkeepers as contractors.
- Most of the respondents would classify themselves as BAS Agents - 43% compared to the term Bookkeeper - 31%
- Working with software that either is online or has functions online
- Majority of clients allow remote access currently or as a future option
- 79% are members of a software partner program

The Bookkeepers Client Base



- Engagement letters are used by 66% of bookkeepers, up from 61% last year—a continuing positive increase each year.
- The trends with what types of services are provided continues along similar paths as in previous years—most provide off-site bookkeeping, payroll, activity statements, superannuation, end of year preparation and taxable payments reporting.
- There is a roughly even division between those who advise on which awards apply to clients' employees.

Benchmarking your Performance and Your Business

- Most are charging between $51 to $60 per hour for bookkeeping
- In this survey, most respondents are also charging the same rate for BAS services
- There are more people than last year charging a higher rate of $101 to $150 per hour for troubleshooting and consulting services
- Most clients' work is still performed for an hourly rate with more people now using a combination of hourly rate and fixed fees; 10% use only fixed fee billing.
- Most people provide 7 day payment terms
- 95% report word of mouth still being the best way new clients connect, from both existing clients and accounting firms
- 57% would like to see a better financial return in their business, while 35% are satisfied.
- Not surprisingly, 79% report clients not providing timely information and 48% report clients providing incomplete or inaccurate information as being the biggest barriers to lodging activity statements on time.

The Online Journey Continues

- 89% of businesses will allow their data online now, up from 84% last year.
- 56% now use totally browser based accounting solutions, up from 45% last year.
- 40% of people now use some kind of digital signature, another positive increase in the trend, up from 19% last year.
- More people plan to do more work remotely this year
- 88% use the BAS Agent portal to lodge a BAS, but there is an increase in the number of people also using other options—49% use GovReports and Xero is on the increase with 30% reported.
- 53% use the portal to lodge the Payment Summary Annual Report, and 27% use GovReports.
- Notably, the majority of people still mail in the paper Tax File Number declaration, but lodgements from Xero are 38%.
- 59% report that they would voluntarily enter the Single Touch Payroll system in 2017, even though 37% say they don't like the idea.
- 79% access client's data remotely.
- 20% of people now use the ATO app, up from 16% last year.

Which Software

- MYOB still leads the way, but Xero for clients continues to increase; more people now use Xero for their own bookkeeping.
- Overall, software received a rating of 53% for "satisfied" and 37% "very satisfied".

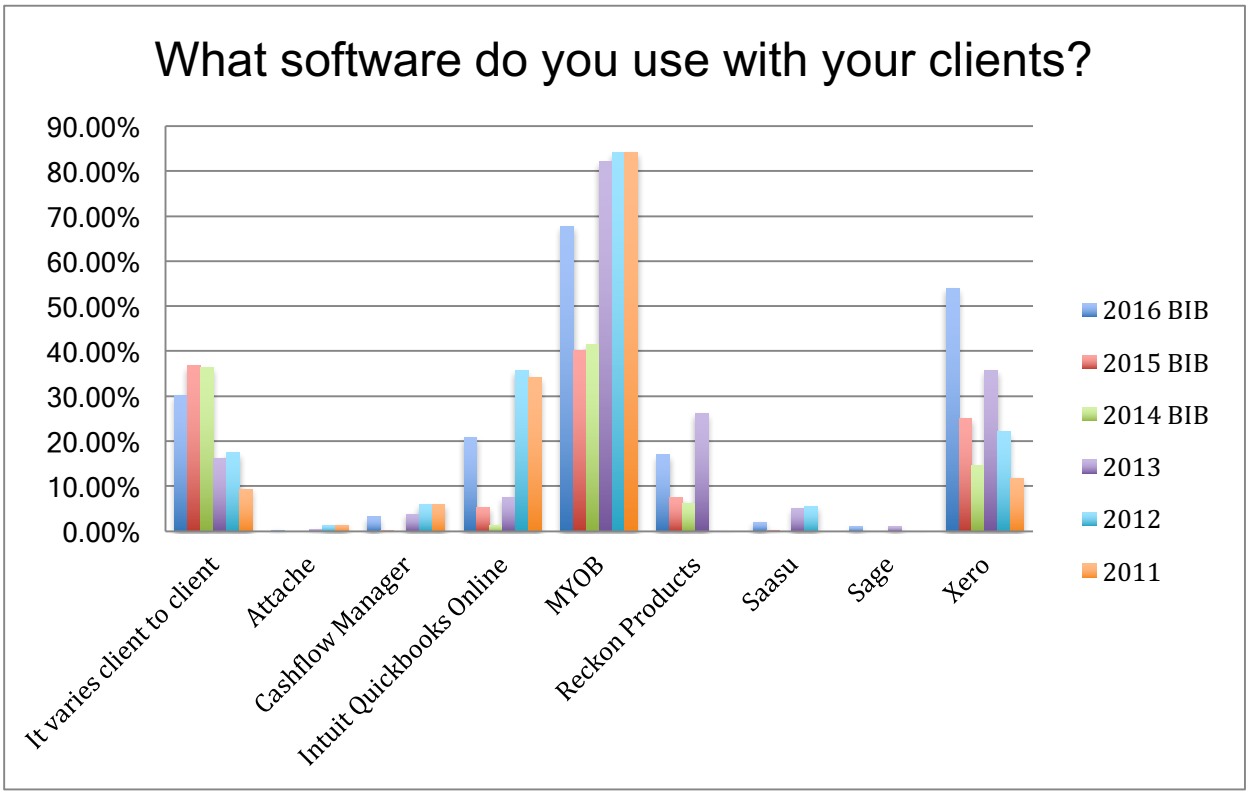


Table of Contents

All About You **8**
Location and Gender distribution of respondents 8
Age distribution of respondents 8
Where do you fit? 9
How do you classify yourself? 9
Are you based within 100kms of a capital city? 9
Are you an ICB Member? 10
What other memberships do you hold? 10

Providing Bookkeeping Services **11**
During BAS Periods, how many hours do you work per week? 11
During Non-BAS Periods, how many hours do you work per week? 11
Bookkeepers in Business hrs p/week Bookkeepers in Employment hrs p/week 11
How many hours do you spend associated with general administration per week? 12
What are the better tools and resources to help you in your bookkeeping? 13
How many Bookkeeper employees work in your business? 13
How many Bookkeeper contractors work in your business? 13
Are you currently looking for more staff? 14
If yes, what type of staff are you looking for? 2016 Only 14

Client Services **15**
Do/Will your clients allow their data online? 15
Do you make payments on behalf of your clients/the business? 15
Do you use the ATO's business Do you use the ATO phone app? benchmarks? 16
Do you hold Public Liability Insurance? 16
What services do you and/or your business provide? 17
Do you have full or part ownership of the business? 17
Please advise the number of years your business has been trading for. 17
How many active clients do you currently have? 18
How many of your clients do you access remotely? 18
Are you presently taking on more clients? 19
How many existing clients have referred new clients to you? 19
Estimate the number of accounting firms who provide you with referrals. 19
How did your clients find you? 20
Do you use a type of engagement letter? 20
Do you get involved in advising the business on which awards apply to employees? 21
In regards to your contractors, what is the average number of billable hours a week they achieve? 21
Do you hold PII Insurance? 22
What terms do you provide to your clients? 22

Bookkeepers in Business **23**
What rate of pay do you pay your employees who provide bookkeeping services for you? 23
What rate of pay do you pay any contractors who provide bookkeeping services for you? 23
What fees do you charge? 24
What fees do you charge for your 'Bookkeeping' services? 24
What fees do you charge for your 'High end, Troubleshooting, Consulting' services? 25
What fees do you charge for BAS services? 25
Are you satisfied with the financial return of your business? 26
Do you charge for travel? If so, how do you calculate it? 26
What is your preferred method for invoicing clients? 26

Software **27**
Which software do you use personally for/in your business? 27
Thinking of the software you use personally for your business how satisfied are you with it? 27
What Social Media platforms do you use? 27
Which of the following best describes the Accounting Software you use for your business? 28

Software **27**
What software do you use with your clients? 29
How satisfied are you with the software you use for your clients? 29
How do you bill your clients for their software subscription? 29
Are you a member of a software partner program? If yes, how satisfied are you with it? 30
Do you obtain Electronic/Digital Signatures from your clients? 31
Will your business use online accounting in the next 5/10 years? 31

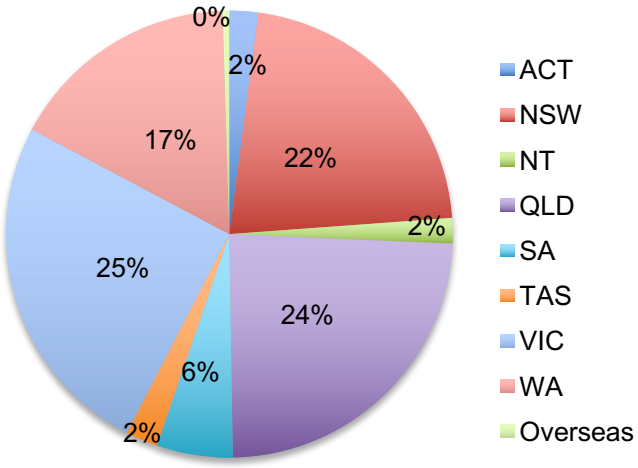
BAS Agent **32**
How do you lodge your end of year payroll Payment Summaries with the ATO? 32
2016 Bookkeepers in Business comparison with 2016 Bookkeepers in Employment 32
How do you lodge the employee TFN Declarations? 33
Do you have a Certificate IV in Bookkeeping or Accounting? 33
2016 Bookkeepers in Business comparison with 2016 Bookkeepers in Employment 33
On a scale of 1 to 10, how satisfied are you with the Tax Practitioners Board? 34
On a scale of 1 to 10, how satisfied are you with the ATO? 34
Do we prefer the ATO or the TPB? 34
Which of the following are you? 35
If you are not currently registered, do you intend to register? 35
Do you use the ATO's BAS Agents portal? 35
Do you use ECI? 36
Do you use your client's business portal? 36
How do you obtain the Integrated Client Account or Running Balance Report for your client 36
Do you have your own Auskey? 37
How many of your clients do you have access to their Auskey? 37
Will you renew your BAS Agent Registration when it is next due? 37
How do you lodge the BAS for your Clients? 38
What are the biggest barriers to lodging your clients' activity statements by the due date? 38
Which of the following does your business interact with? 39
Do you use the ATO Business Portal? 39
How do you lodge the BAS for the business? 39
Does the business have it's own Auskey? 40
What are the biggest barriers to lodging your activity statements by the due date? 40
How important do you consider lodging your BAS on time? 40

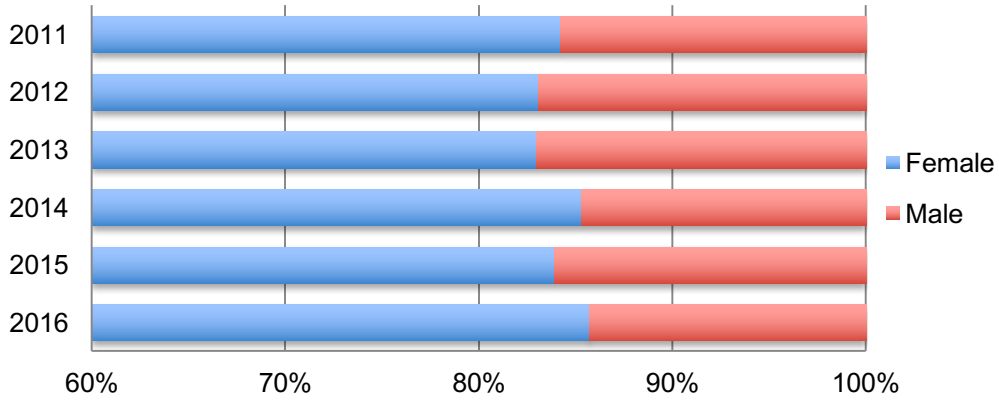
All About ICB **41**
On a scale of 1 to 10, how satisfied are you with ICB? 41
How many times per month do you visit the ICB Website? 41
Which ICB Membership Benefits should ICB continue to deliver? 42
How much continuing education have you undertaken in the past year? 42
Which format of continuing professional education do you prefer? 43
I would like education/information/resources on the following… 43
How much of the ICB Newsletter do you read? 43
Bookkeepers in Business comparison to Bookkeepers in Employment 43
Which format of the ICB Newsletter do you read? 44
Which version of email updates & news would you prefer? 44
If ICB were to establish a Bookkeepers Mentoring Program, would you be interested? 44
If ICB established a Directory of Services members were willing to provide to other bookkeepers, would you be interested? 45

The Future **46**
How many years until you plan to retire? 46
The internet will open up a greater for you to work remotely (not in the office) 46
This year: How much of your work do you do remotely? 46
Next year: How much of your work do you think you might do remotely? 47
Have you heard about "Single Touch Payroll" from the ATO? 47
If STP is a better system and helps catch the crooks will you voluntarily enter STP in 2017? 47

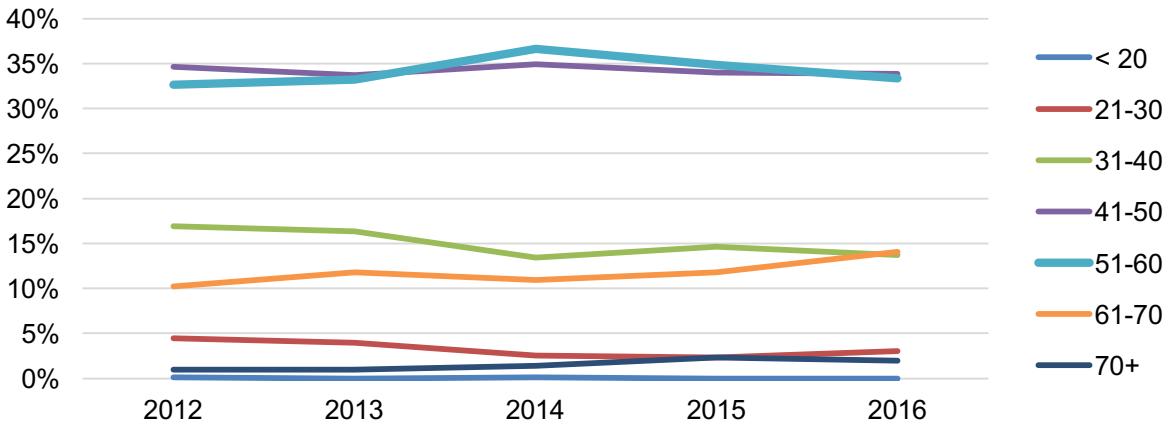
All About You

Location distribution of respondents





Age distribution of respondents



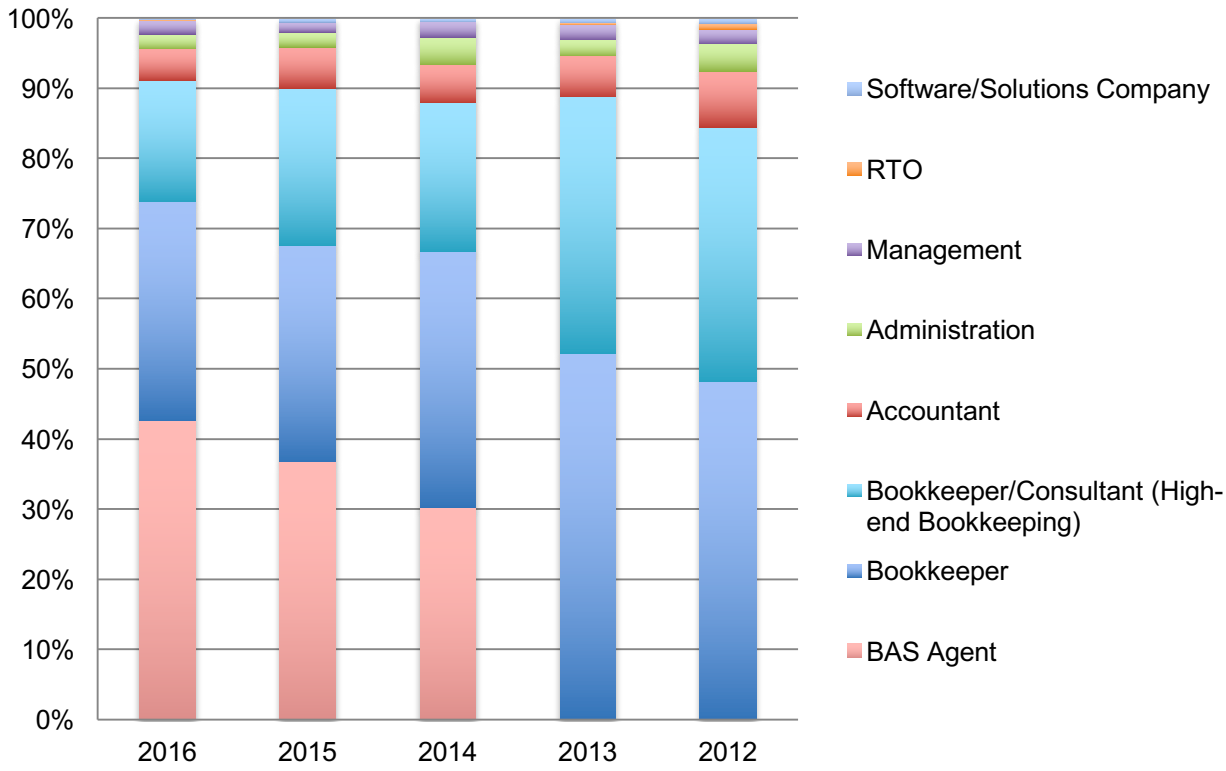
Location trends remain stable, with majority of Bookkeepers based in New South Wales (22%), Queensland (24%), Victoria (25%) and WA (17%). Gender ratios also remain stable with 85% female (84% in 2015) and 14% male (16% in 2015). Similarly, majority of bookkeepers remain in the 41- 60 age bracket (67% in 2016, 69% in 2015 and 72% in 2014).

Where do you fit?

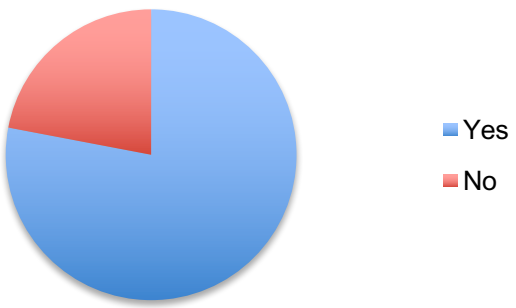
	2016	2015	2010
A sole trader conducting your bookkeeping business of just you	46%	51%	41%
The owner of a bookkeeping business	38%	33%	45%
An employee working on clients of your employer's business	5%	4%	3%
An employee working only on the books of your employer	11%	11%	10%
An employee of a Software Company	0%	1%	0%

46% of respondents answered that they are Sole Traders in 2016, compared to 51% in 2015, while 38% were the owners of bookkeeping businesses in 2016 and 33% in 2015.

How do you classify yourself?

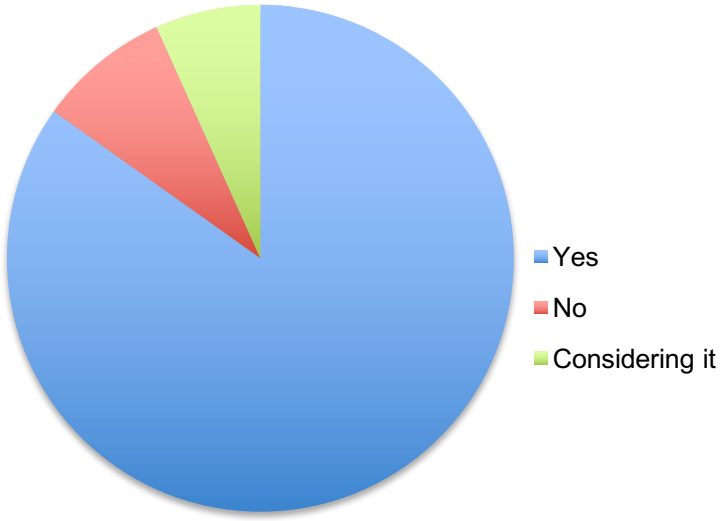


Are you based within 100kms of a capital city?



78% of respondents are based within a capital city (2016), remaining fairly stable when compared to previous years (76% in 2015, 77% in 2014 and 75% in 2013).

Are you an ICB Member?



85% of respondents to the survey are ICB Members (2016), which remains consistent with previous years (85% in 2015, 81% in 2014, 83% in 2013 and 79% in 2012).

What other memberships do you hold?

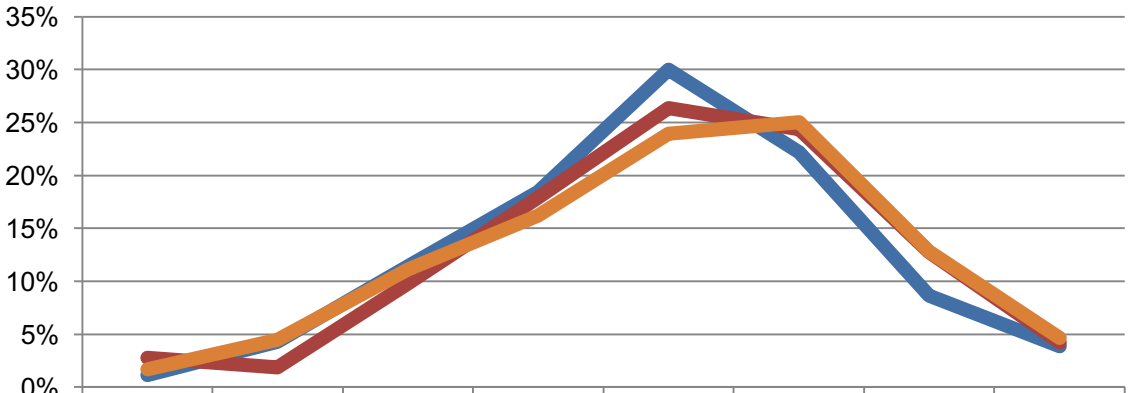
(Options with less than 1% response have been removed)

	2016	2015	2011
Accounting Associations: (CPA/ICAA/ IPA(NIA)/ATMA/ACCA.TIA/NTAA)	9%	10%	11%
AAT	3%	5%	8%
ABN/ABA	22%	21%	26%
Intuit ProAdvisor program	18%	16%	0%
MYOB Bookkeeper	20%	19%	9%
MYOB Certified Consultant	12%	12%	15%
MYOB Professional Partner	19%	18%	29%
Reckon Accredited Professional Partner	4%	4%	4%
Reckon Professional Partner	9%	9%	12%
SAASU	1%	2%	0%
Xero Partner	46%	40%	12%
I am not a member of any other organisations	20%	24%	33%

Interestingly, more Bookkeepers in Business are Reckon Professional Partners (11%), than Bookkeepers in Employment (1%), and Bookkeepers in Employment are more likely not to have membership with any other organisations (48%) compared to Bookkeepers in Business (15%).

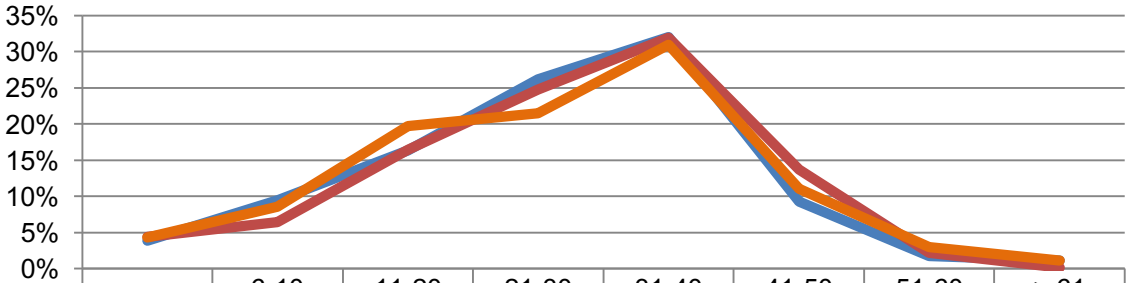
Providing Bookkeeping Services

During BAS Periods, how many hours do you work per week?



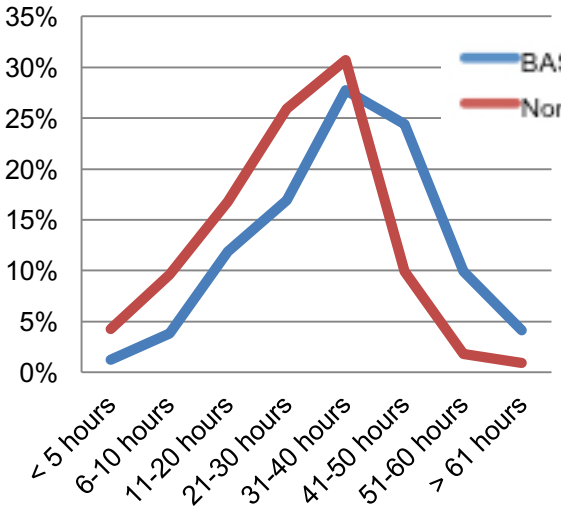
	< 5 hours	6-10 hours	11-20 hours	21-30 hours	31-40 hours	41-50 hours	51-60 hours	> 61 hours
2016	1%	4%	11%	18%	30%	22%	9%	4%
2015	3%	2%	10%	18%	26%	24%	13%	4%
2011	2%	4%	11%	16%	24%	25%	13%	5%

During Non-BAS Periods, how many hours do you work per week?

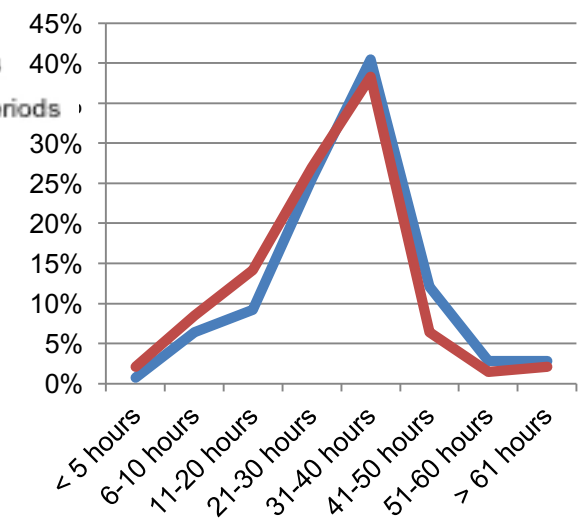


	< 5 hours	6-10 hours	11-20 hours	21-30 hours	31-40 hours	41-50 hours	51-60 hours	> 61 hours
2016	4%	9%	16%	26%	32%	9%	2%	1%
2015	4%	6%	16%	25%	32%	14%	2%	0%
2011	4%	9%	20%	21%	31%	11%	3%	1%

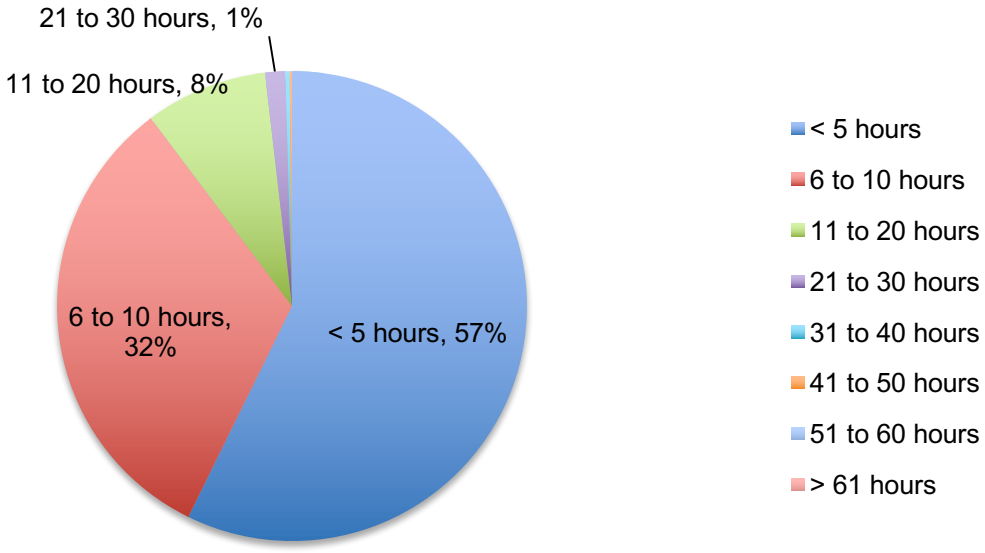
Bookkeepers in Business hrs p/week



Bookkeepers in Employment hrs p/week

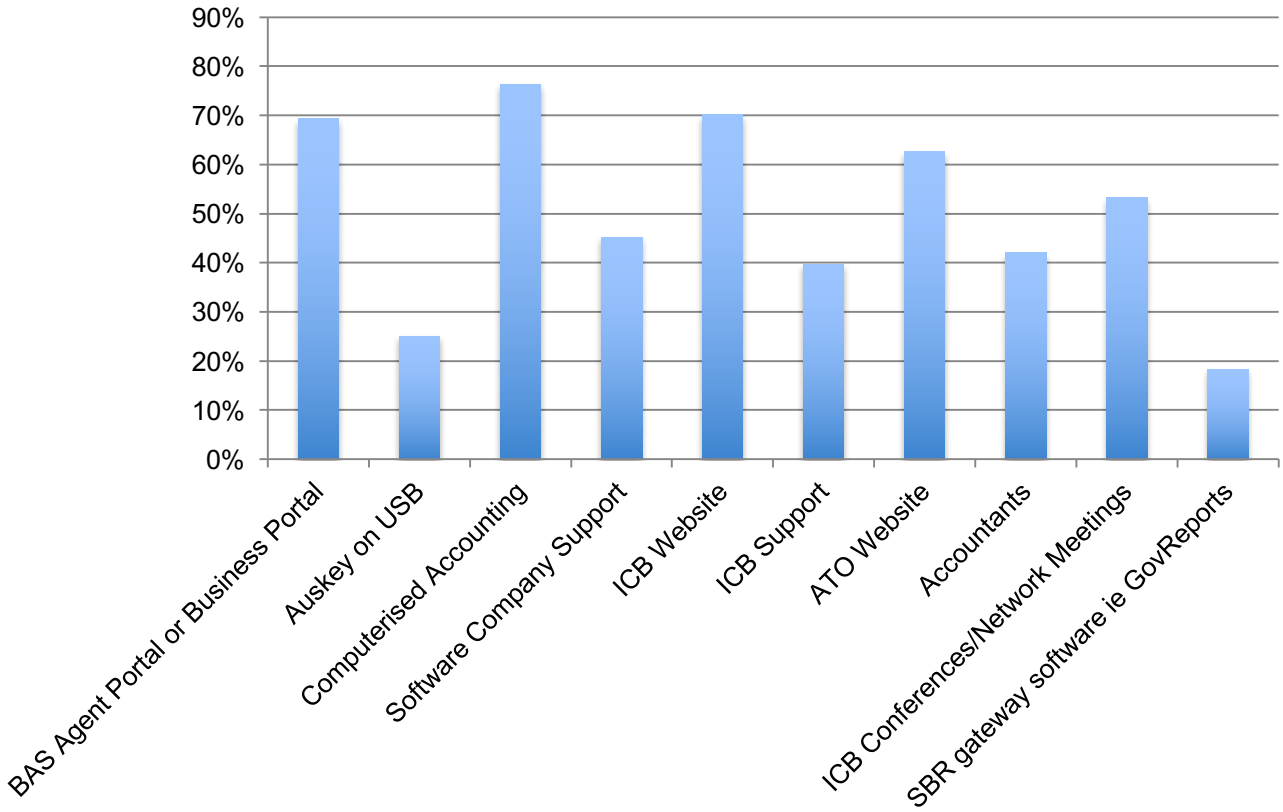


How many hours do you spend associated with general administration per week?



While the majority of Bookkeepers in Business spend <5 hours on General Administration per week (57%), more Bookkeepers in Employment (53%) spend 6 – 20 hours on General Administration per week.

What are the better tools and resources to help you in your bookkeeping?



Bookkeepers in Business Questions Only

How many Bookkeeper employees work in your business?

Full Time Bookkeeper Employees	2016	2015	2014	2013	2012
None	47%	45%	54%	43%	42%
1 to 3	50%	52%	45%	54%	56%
4 to 7	2%	2%	1%	3%	2%
8 to 15	0%	0%	0%	0%	0%
16 to 24	0%	0%	0%	0%	0%
25 or more	0%	0%	0%	0%	0%

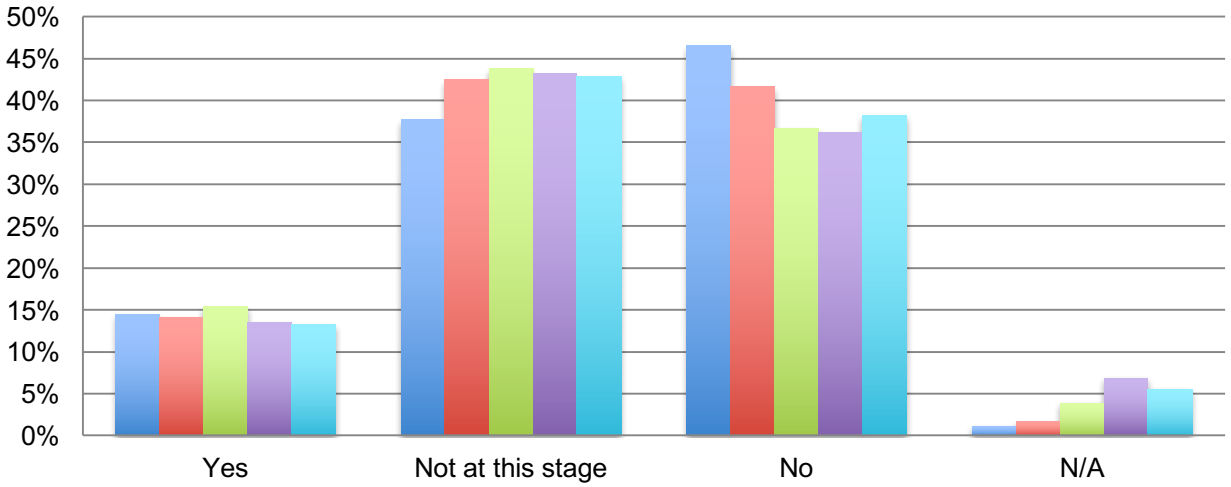
Part Time Bookkeeper Employees	2016	2015	2014	2013	2012
None	64%	71%	71%	68%	71%
1 to 3	34%	27%	27%	30%	27%
4 to 7	1%	2%	2%	2%	2%
8 to 15	0%	0%	0%	0%	0%
16 to 24	0%	0%	0%	0%	0%
25 or more	0%	0%	0%	0%	0%

How many Bookkeeper contractors work in your business?

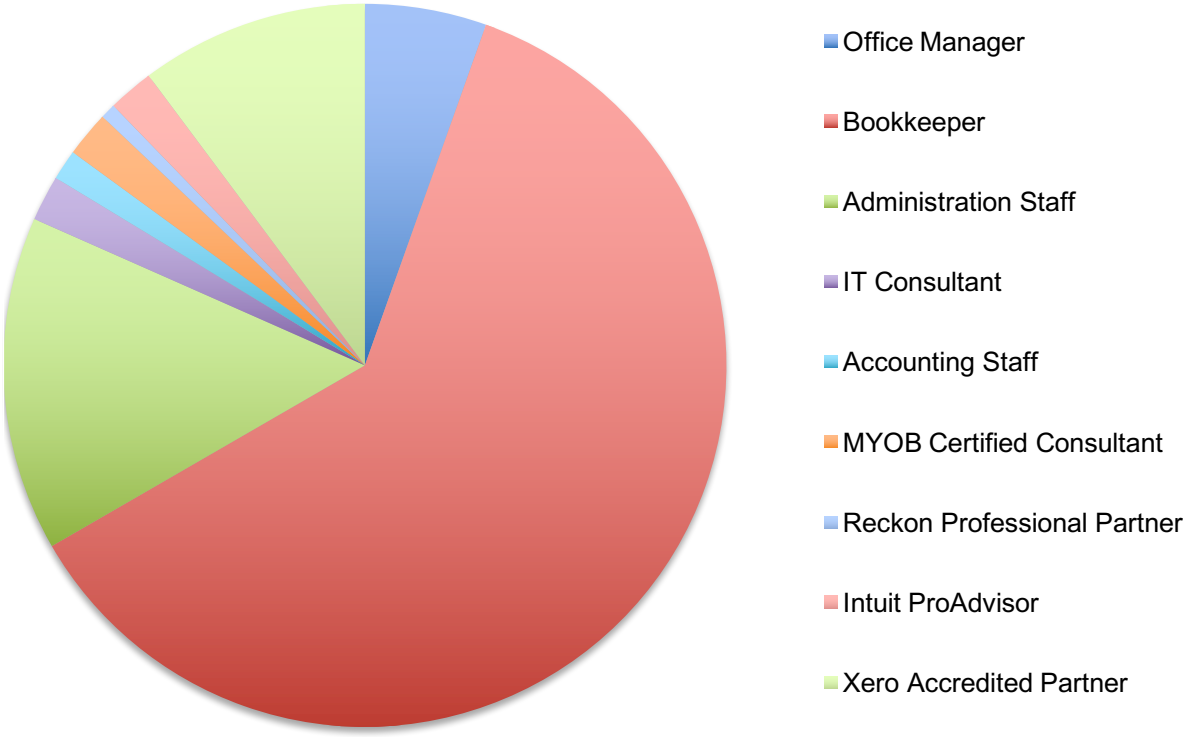
Full Time Bookkeeper Contractors	2016	2015	2014	2013	2012
None	87%	83%	86%	92%	91%
1 to 3	12%	17%	14%	8%	8%
4 to 7	0%	0%	0%	0%	0%
8 to 15	0%	0%	0%	0%	0%
16 to 24	0%	0%	0%	0%	0%
25 or more	0%	0%	0%	0%	0%

Part Time Bookkeeper Contractors	2016	2015	2014	2013	2012
None	76%	79%	77%	79%	82%
1 to 3	23%	20%	23%	20%	17%
4 to 7	1%	1%	0%	1%	1%
8 to 15	0%	0%	0%	0%	0%
16 to 24	0%	0%	0%	0%	0%
25 or more	0%	0%	0%	0%	0%

Are you currently looking for more staff?



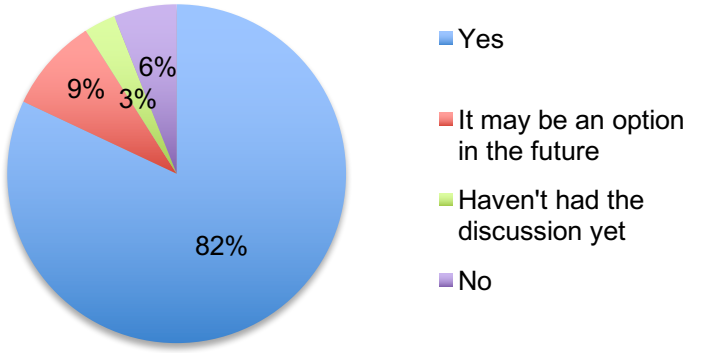
If yes, what type of staff are you looking for? 2016 Only



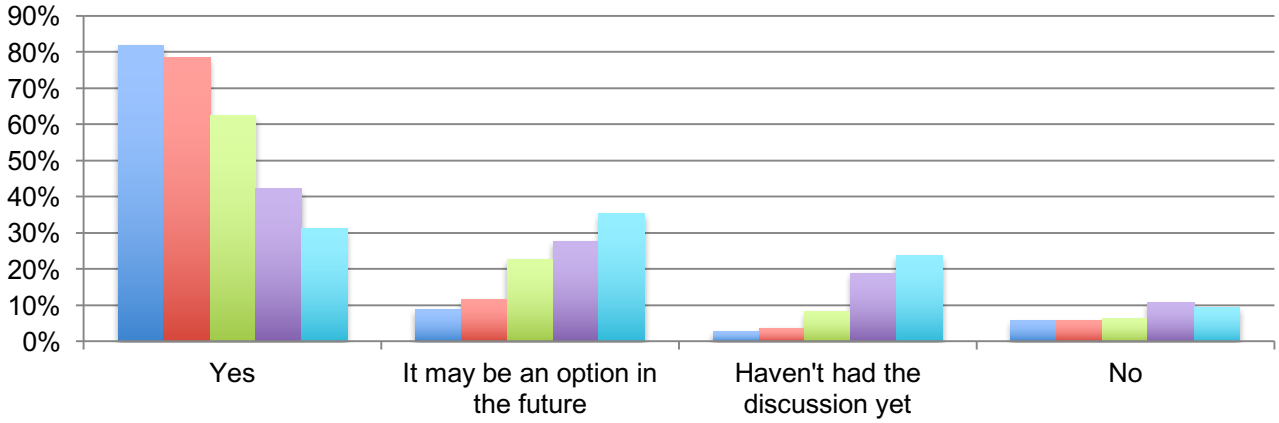
Responses to this question also remain fairly constant, with 61% answering they are looking for Bookkeeping staff (78% in 2015), 15% for Administration staff (10% in 2015) and 10% for Xero Accredited Partners (6% in 2015). Only 15% of Respondents answered that they were looking for more staff, which is also consistent with previous years (14% in 2015, 16% in 2014, 15% in 2013 and 13% in 2012).

Client Services

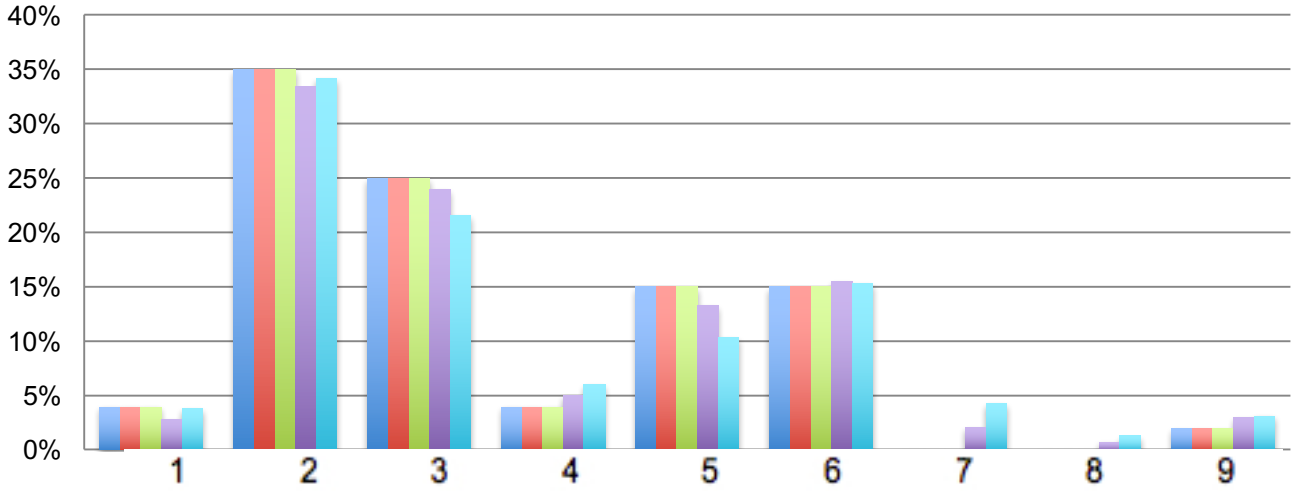
Do/Will your clients allow their data online?



Interestingly, 53% of Bookkeepers in Employment answered that their businesses allow their data online, while 89% of Bookkeepers in Business answered that their clients allow their data online. 20% of Bookkeepers in Employment answered that this may be an option in the future.
This years results are consistent with the increasing trend towards allowing data online over previous years, with 78% answering yes in 2015, 62% in 2014 and 57% in 2013.

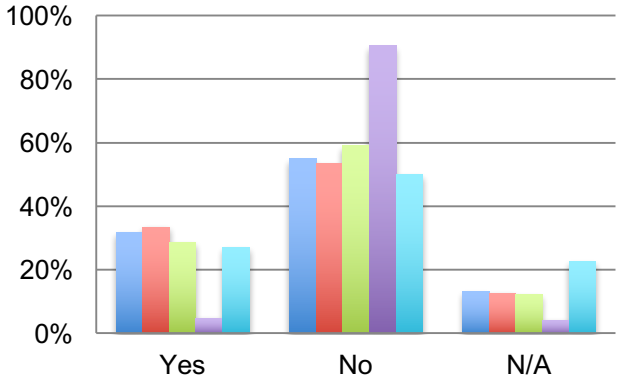


Do you make payments on behalf of your clients/the business?

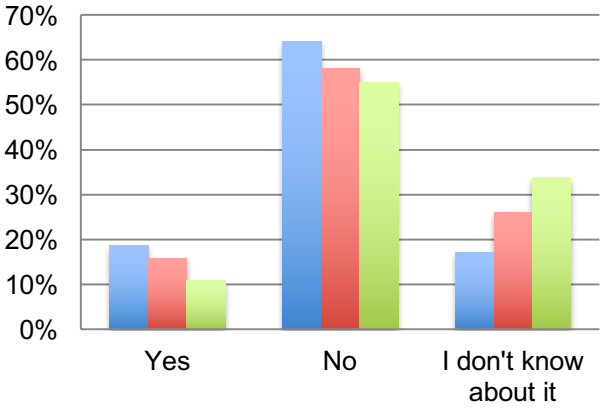


1. Yes I write and sign cheques on the client account	2. Yes, I enter transactions into internet banking to make payments for my clients	3. Yes, following specific authorisation from the client, I use internet banking to make payments
4. No, I write cheques for the client to sign	5. No, I prepare banking transactions but the client must log in to authorise the payments	6. No, I do not do any part of the payment process
7. I am employed it is part of my job	8. I am employed and do not make payments	9. N/A

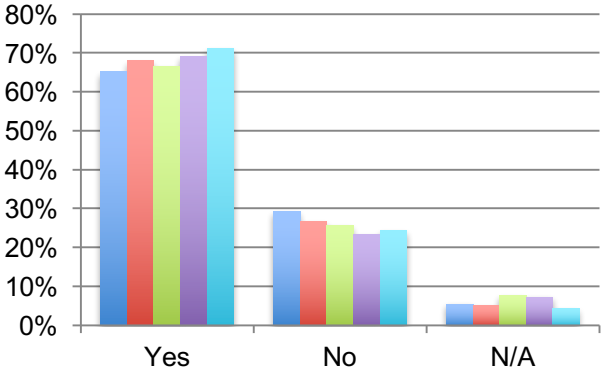
Do you use the ATO's business benchmarks?



Do you use the ATO phone app?

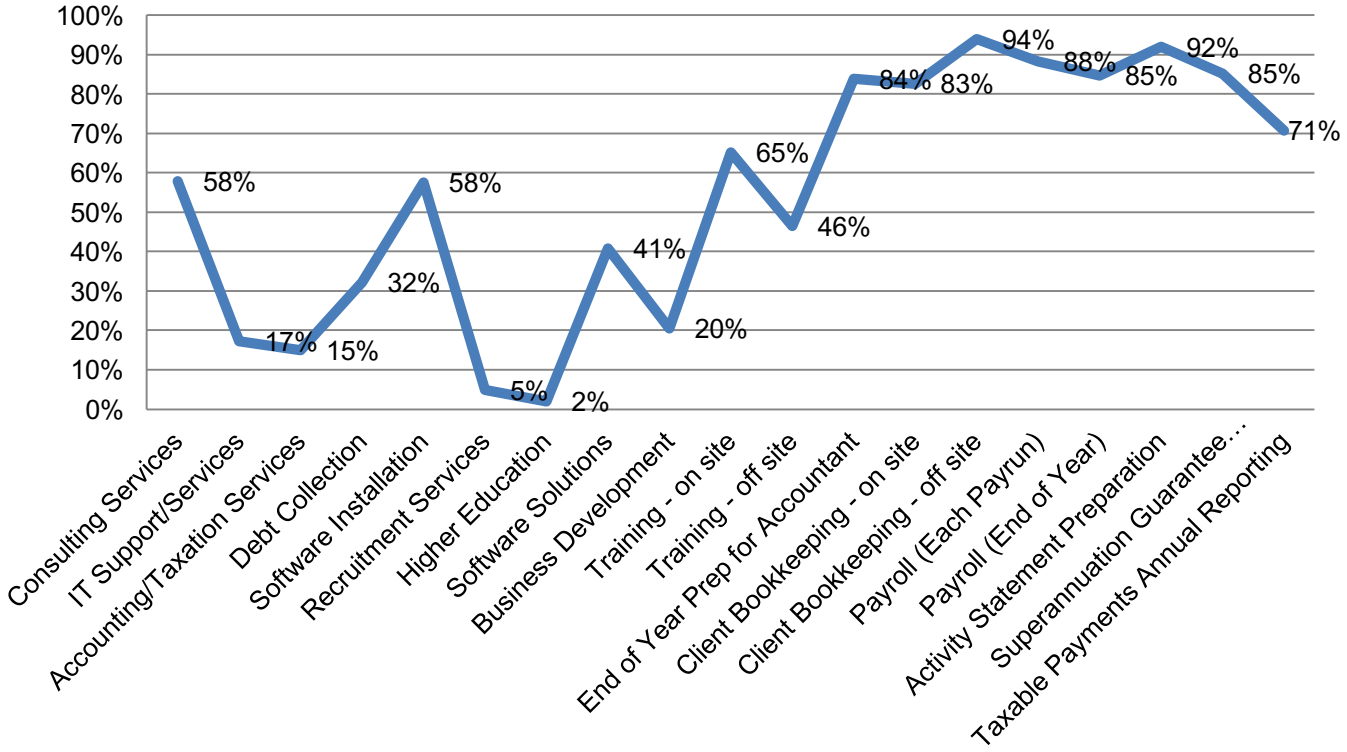


Do you hold Public Liability Insurance?

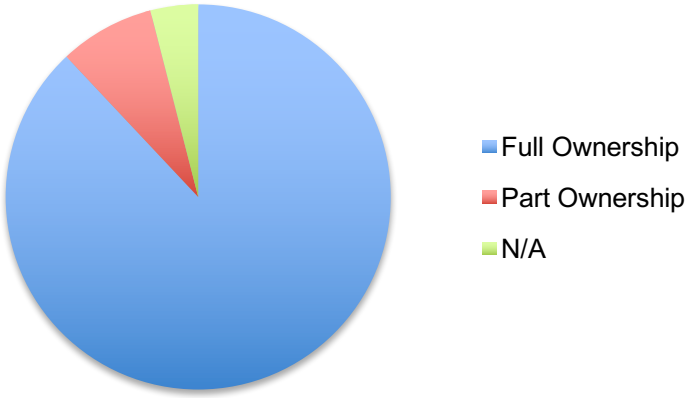


Bookkeepers in Business Questions Only

What services do you and/or your business provide?

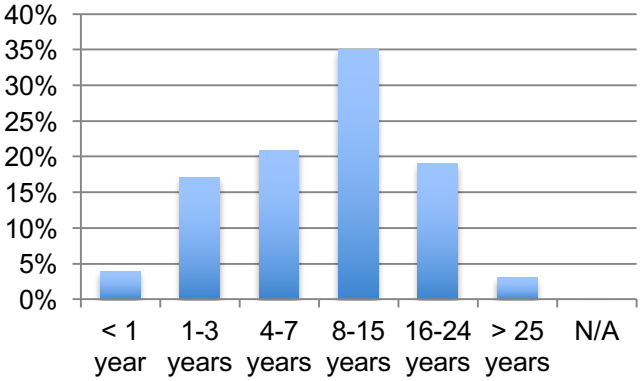


Do you have full or part ownership of the business?



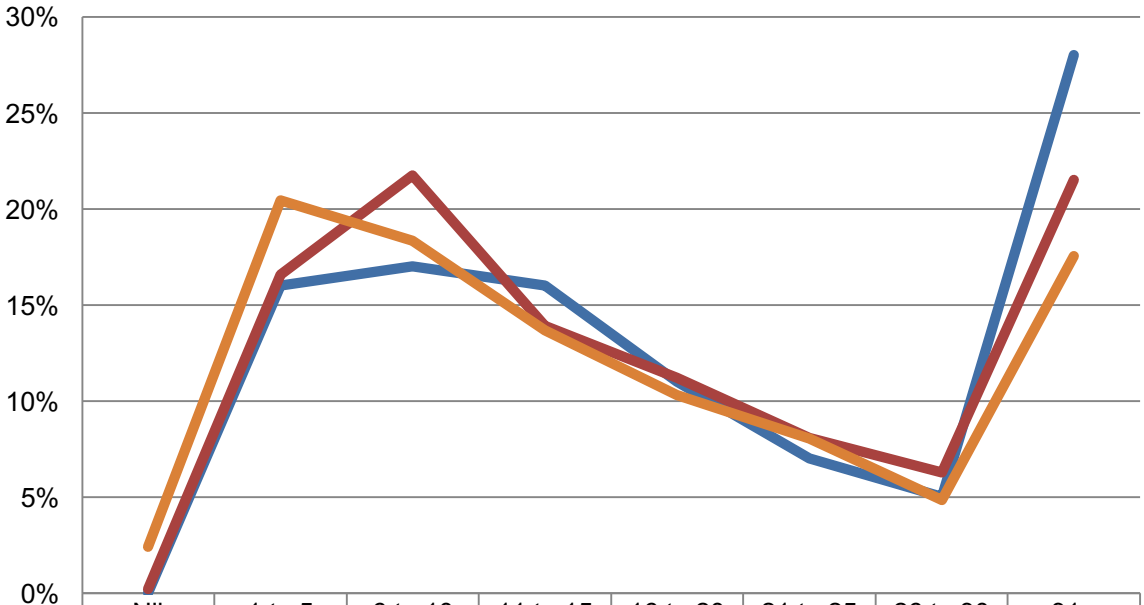
Responses to this question remain consistent, with 88% answering full ownership and 8% answering part ownership, with the same for 2015 and 87% and 8% respectively for 2014.

Please advise the number of years your business has been trading for.



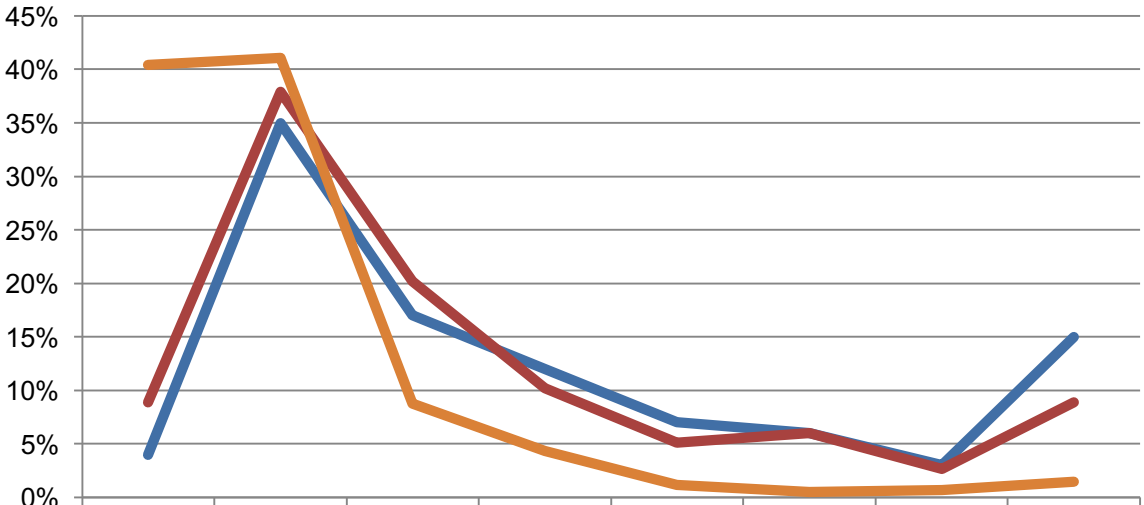
Responses to this question are also consistent with majority of respondents answering that their business has been trading for between 8-15 years in 2016 (35%), 4-7 years (21%) and 16-24 years (19%) 2015 (37%, 20% and 16% respectively), 2014 (42%, 22% and 11% respectively). 2013 and 2012 showed similar trends, with the majority answering 8-15 years (36% and 37% respectively), however, more respondents answered 4-7 years (25% and 28% and 1-3 years (19% and 18%).

How many active clients do you currently have?



	Nil	1 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31+
2016	0%	16%	17%	16%	11%	7%	5%	28%
2015	0%	17%	22%	14%	11%	8%	6%	22%
2011	2%	20%	18%	14%	10%	8%	5%	18%

How many of your clients do you access remotely?

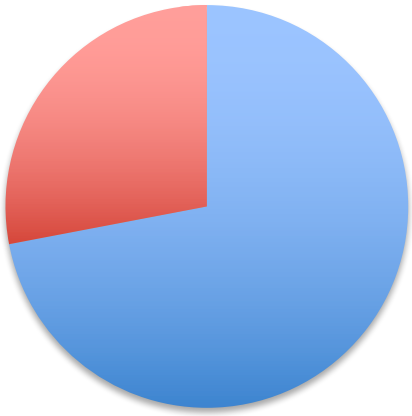


	Nil	1 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31+
2016	4%	35%	17%	12%	7%	6%	3%	15%
2015	9%	38%	20%	10%	5%	6%	3%	9%
2011	40%	41%	9%	4%	1%	0%	1%	1%

15% have more than 30 Clients that they access remotely out of the 28% that have more than 30 clients. In general the trend is to more clients (18% increased to 28% over the 5 years having more than 30 clients) and substantially increased remote access (from 1% to 15%).

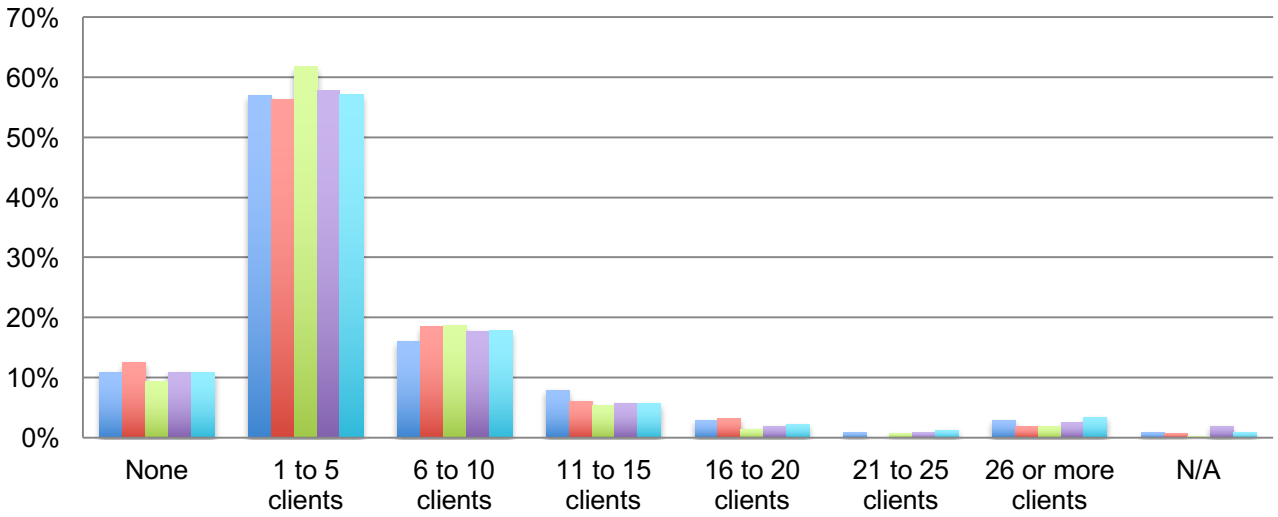


Are you presently taking on more clients?

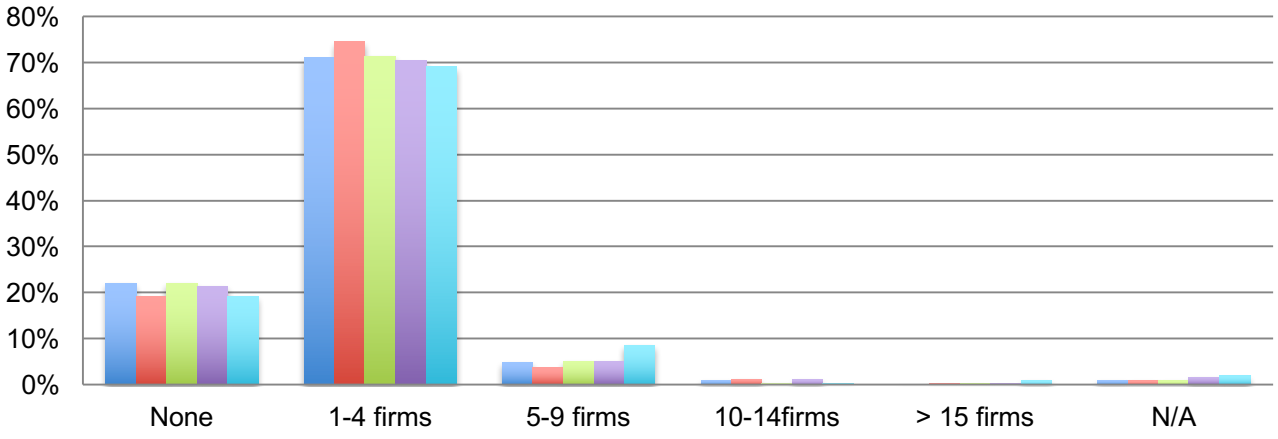


Results for 2016 are consistent with previous years, with majority of respondents (72%) answering that they are taking on more clients, as in 2015 (69%), 2014 (70%), 2013 (69%) and 2012 (65%).

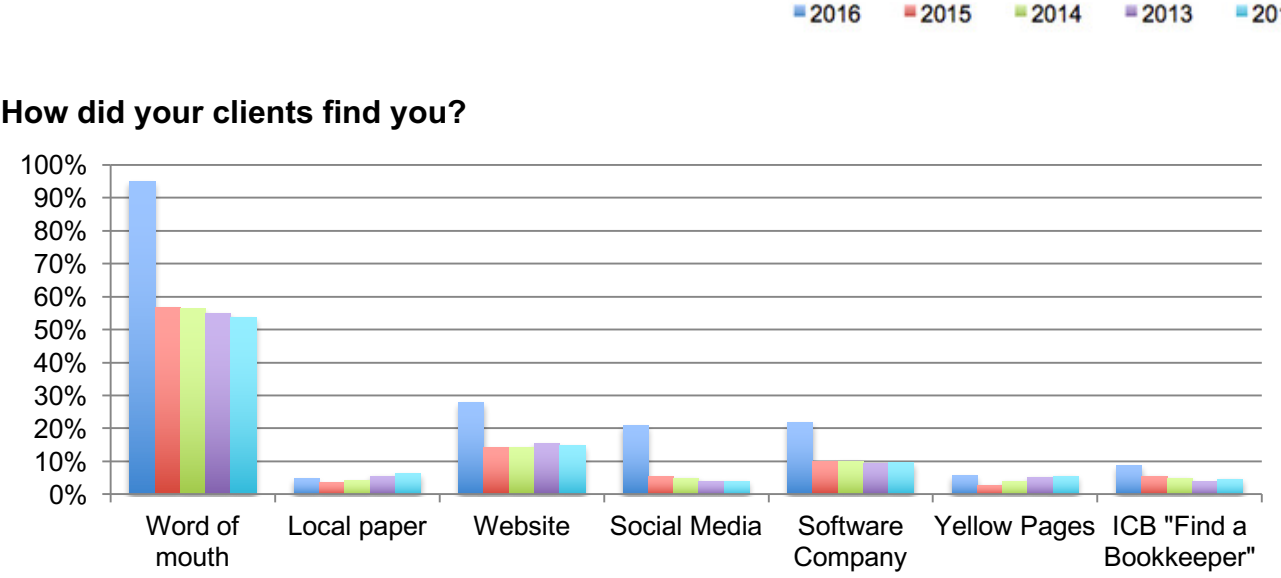
How many existing clients have referred new clients to you?



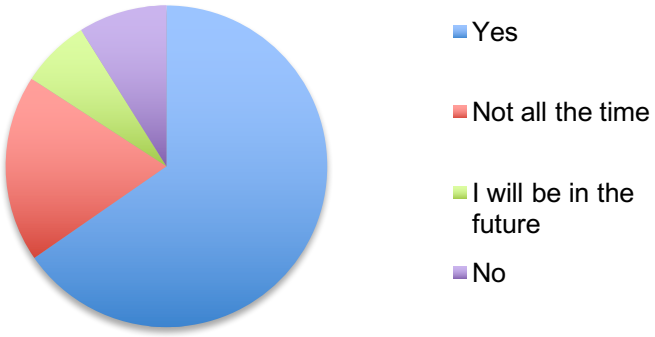
Estimate the number of accounting firms who provide you with referrals.



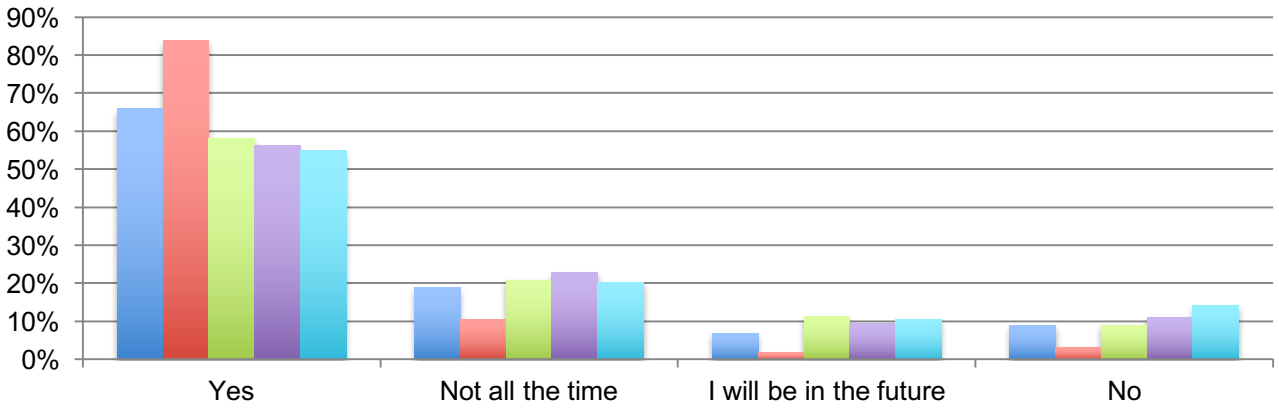
How did your clients find you?

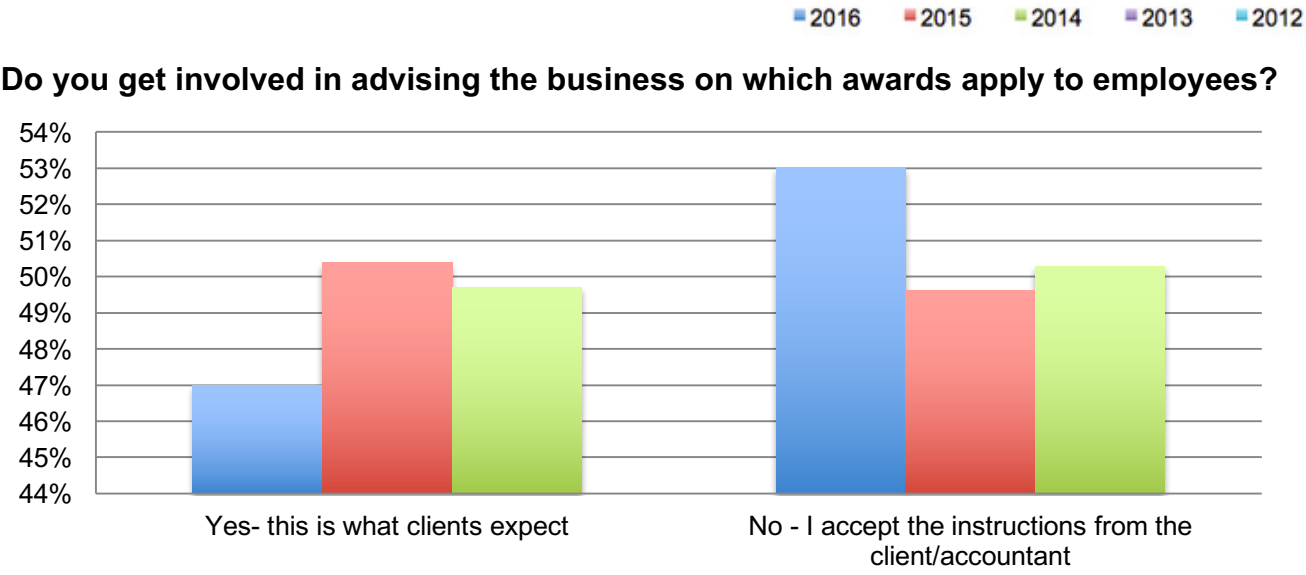


Do you use a type of engagement letter?



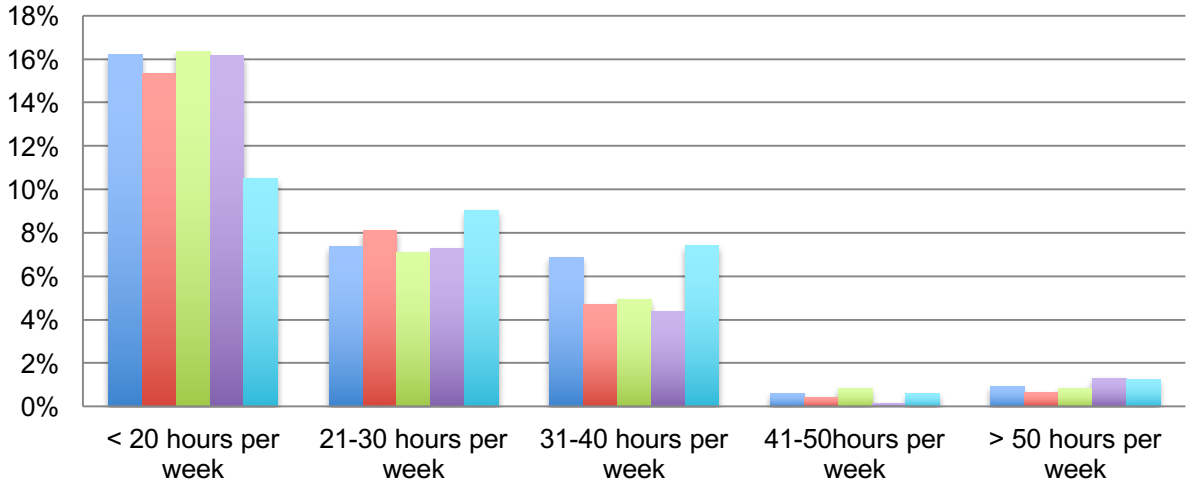
Only 66% of Respondents in 2016 answered that they use a type of engagement letter, compared with 84% in 2015. However, this response is more consistent with those from 2014 (58%), 2013 (56%) and 2012 (55%).



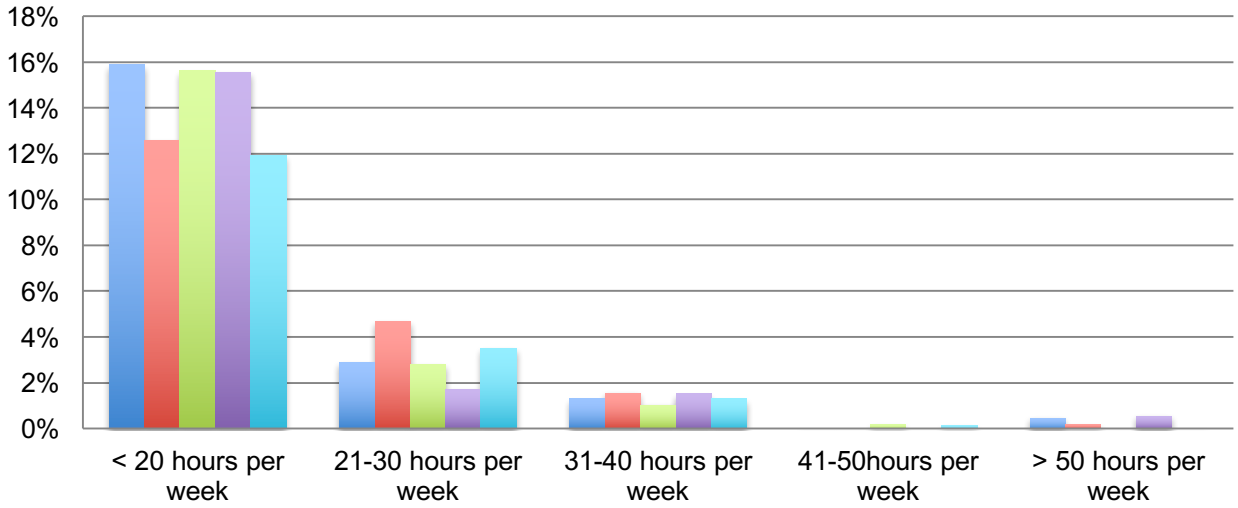


Do you get involved in advising the business on which awards apply to employees?

In regards to your employees, what is the average number of billable hours a week they achieve?

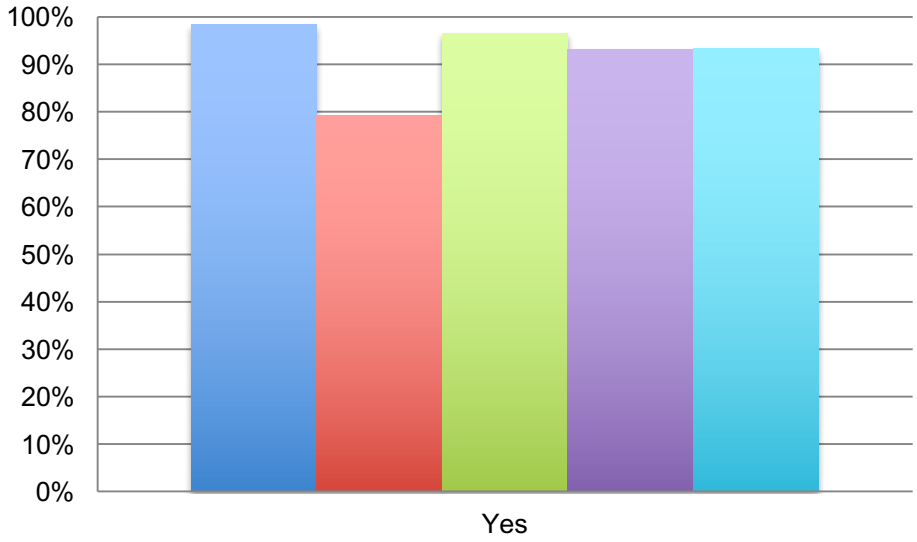


In regards to your contractors, what is the average number of billable hours a week they achieve?

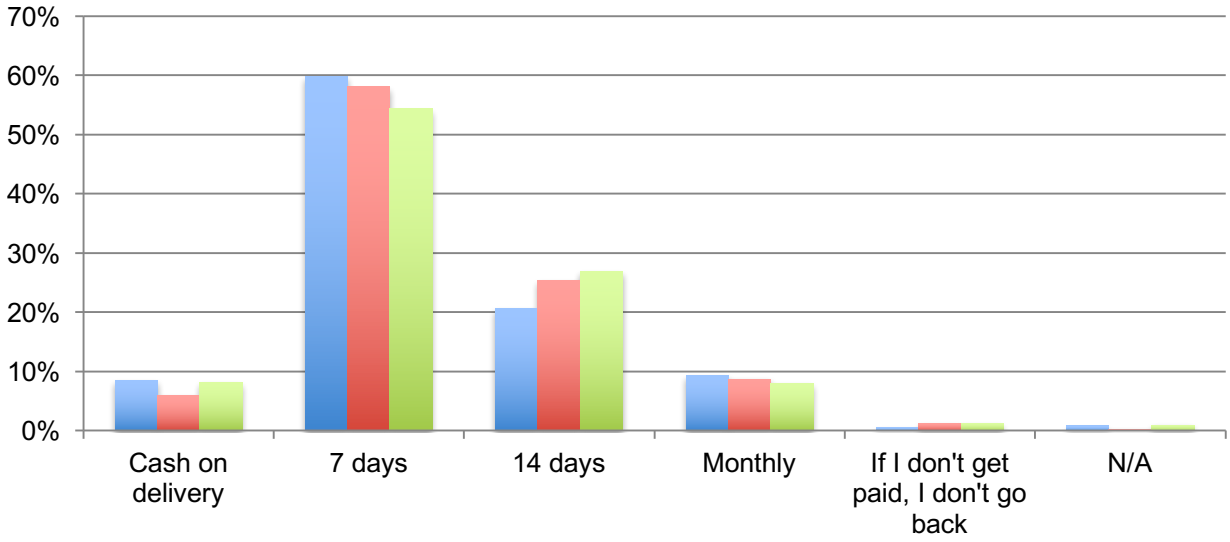


In regards to both employees and contractors, majority of respondents answered that they do not have any (57% and 79% respectively), with the next most common answer being that they work under 20 hours per week (16% of respondents answered this for each question).

Do you hold PII Insurance?



What terms do you provide to your clients?

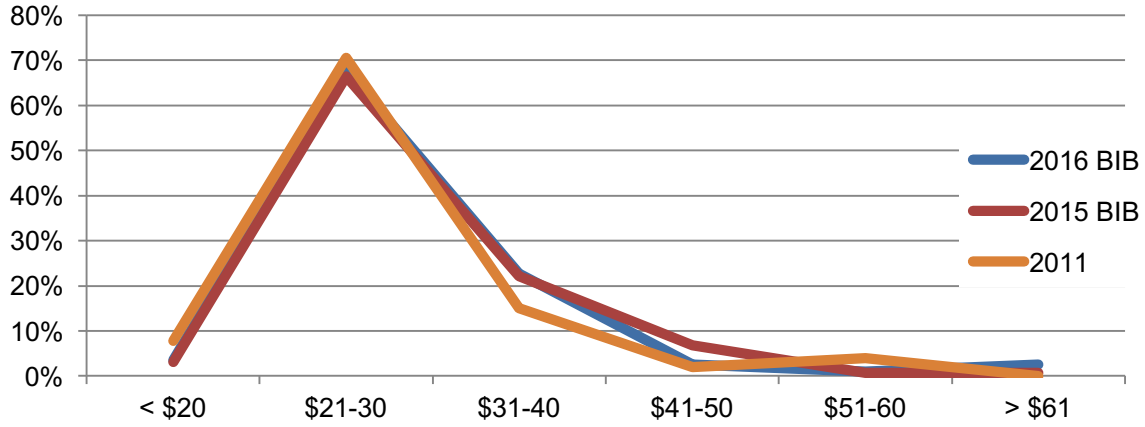


Bookkeepers in Business

Bookkeepers in Business Questions Only

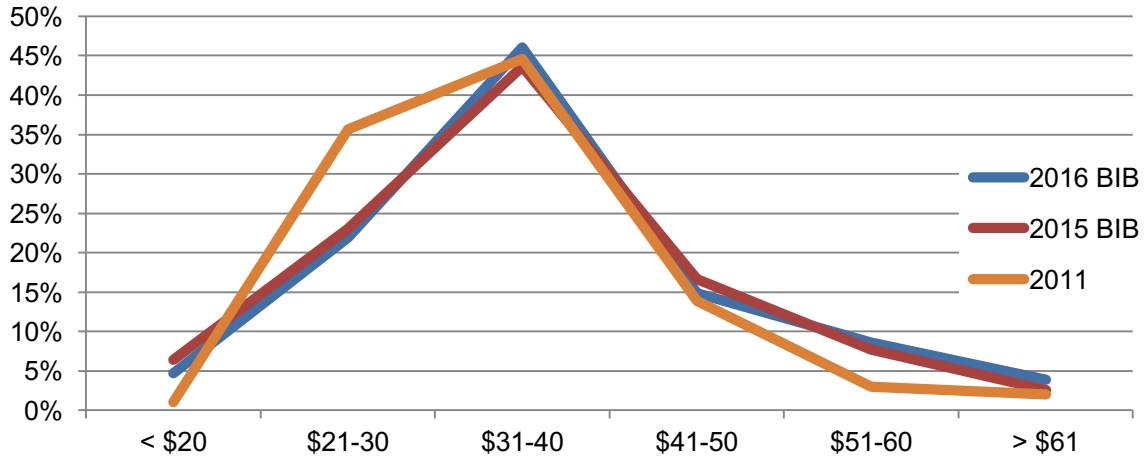
Statistics are for those where paying employees is applicable
2016 vs 2015 vs 2011

What rate of pay do you pay your employees who provide bookkeeping services for you?



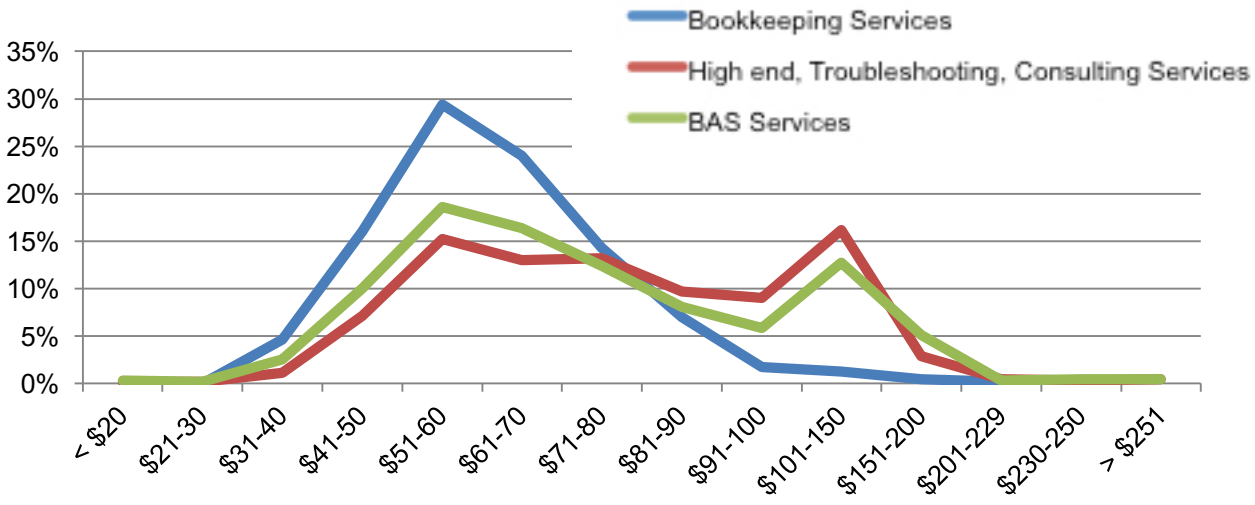
Indicates a minor increase in pay rates over 5 years and negligible in 2016

What rate of pay do you pay any contractors who provide bookkeeping services for you?

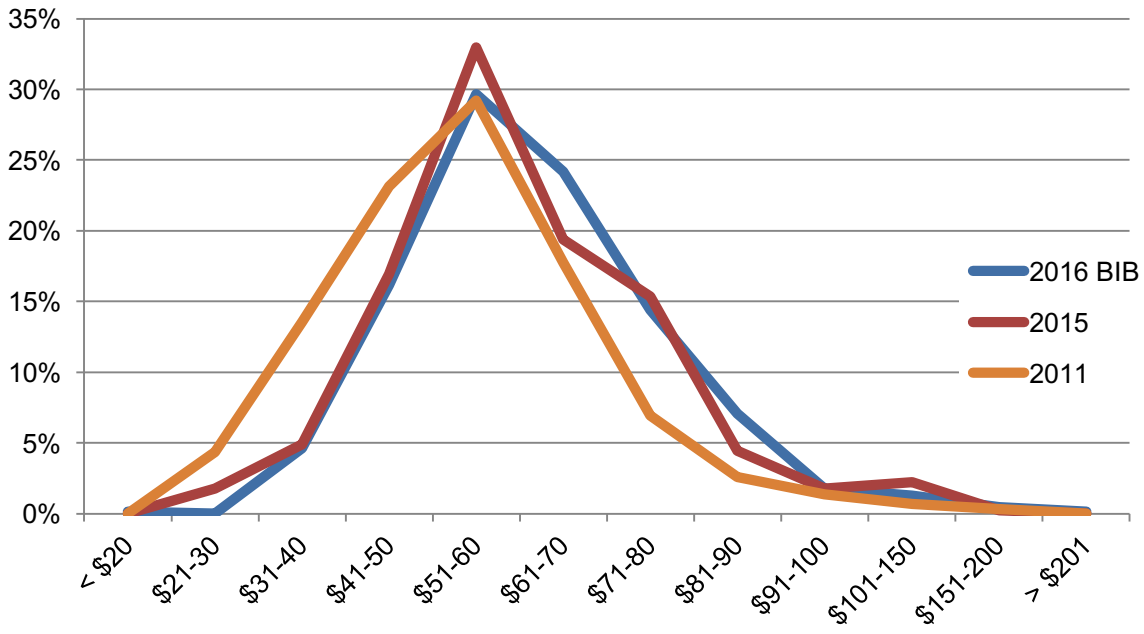


Indicates an increase in rate over the 5 years and negligible over the 2016 year

What fees do you charge?

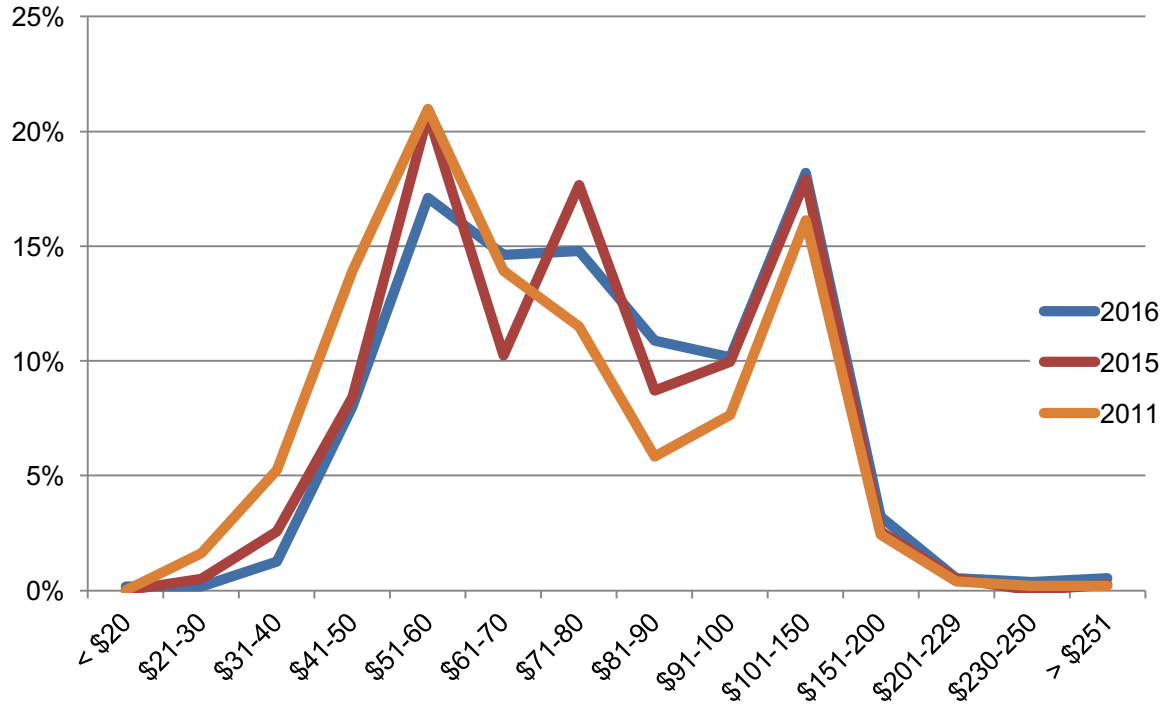


What fees do you charge for your 'Bookkeeping' services?



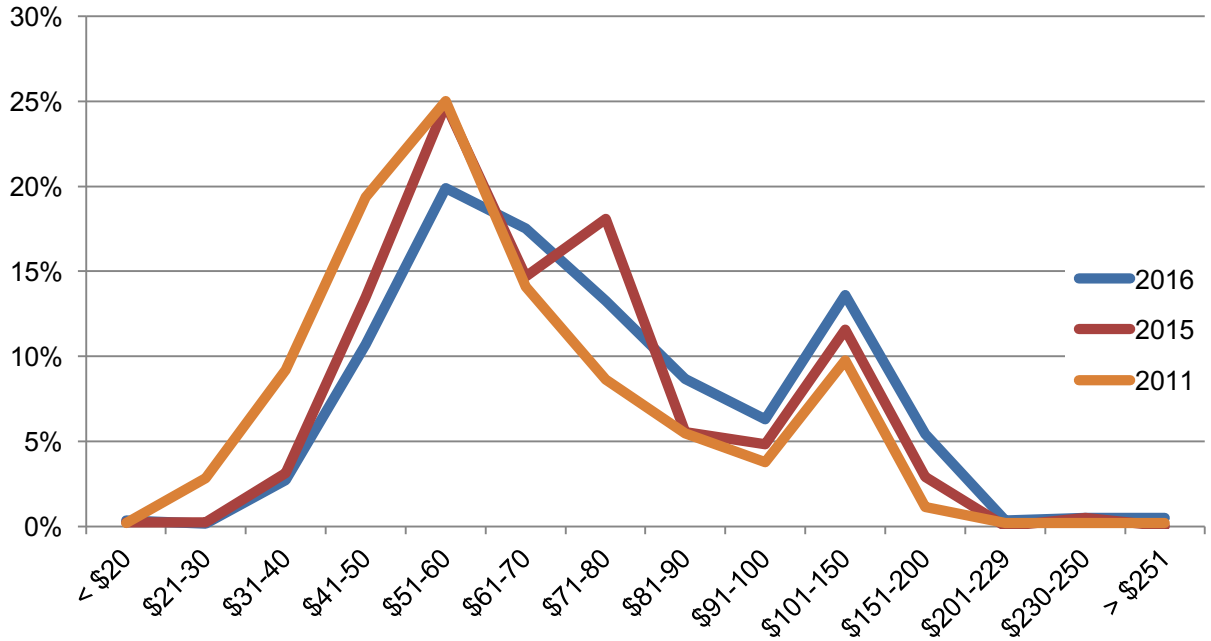
The 5 year trend has shown a distinct upward move in the charge rates with no reported charging below $30 per hour in 2016. While the average rate has not altered from the $50-$60 range, the trend is upward.

What fees do you charge for your 'High end, Troubleshooting, Consulting' services?



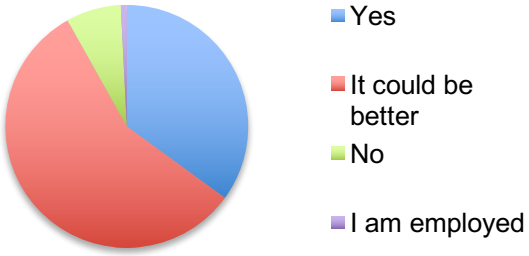
5 year distinct trend upward in rates. Over 2016 there was an increase from the lower end to the mid range rates for these services.

What fees do you charge for BAS services?

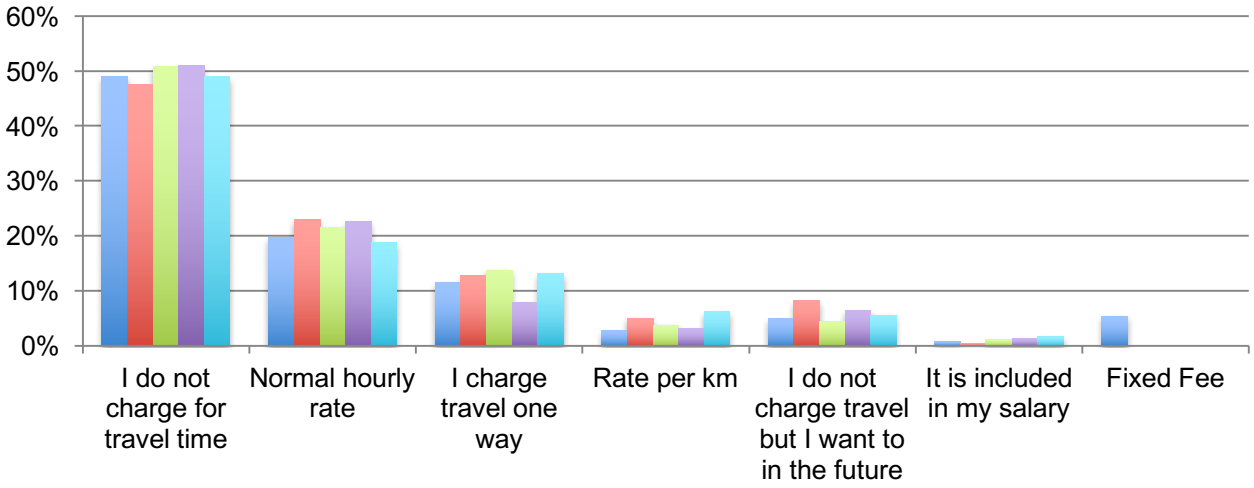


BAS Rate has increase over the 5 years (Average in $50-$60 increased to $60-$70) and also within the 2016 year.

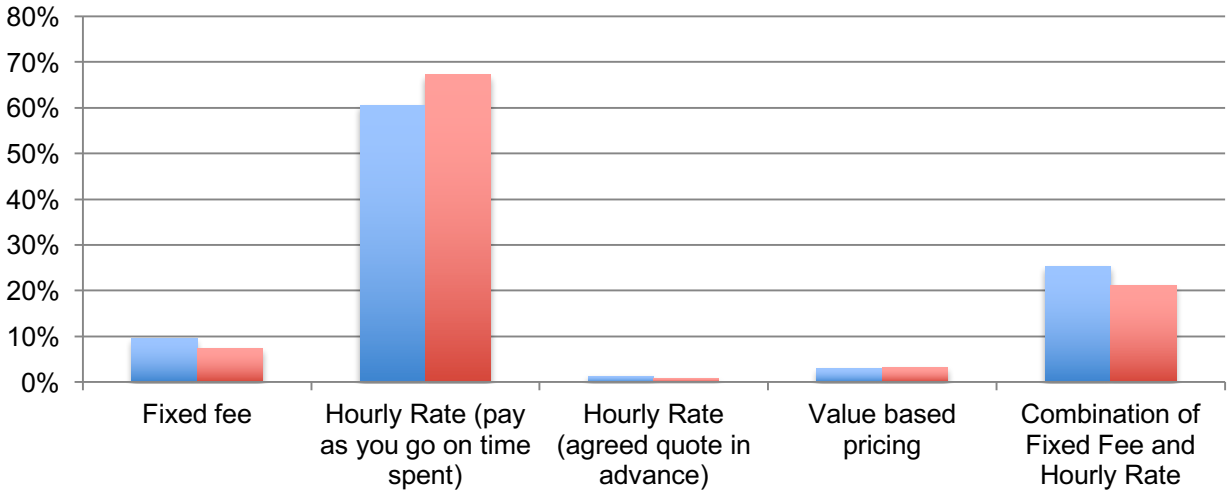
Are you satisfied with the financial return of your business?



Do you charge for travel? If so, how do you calculate it?

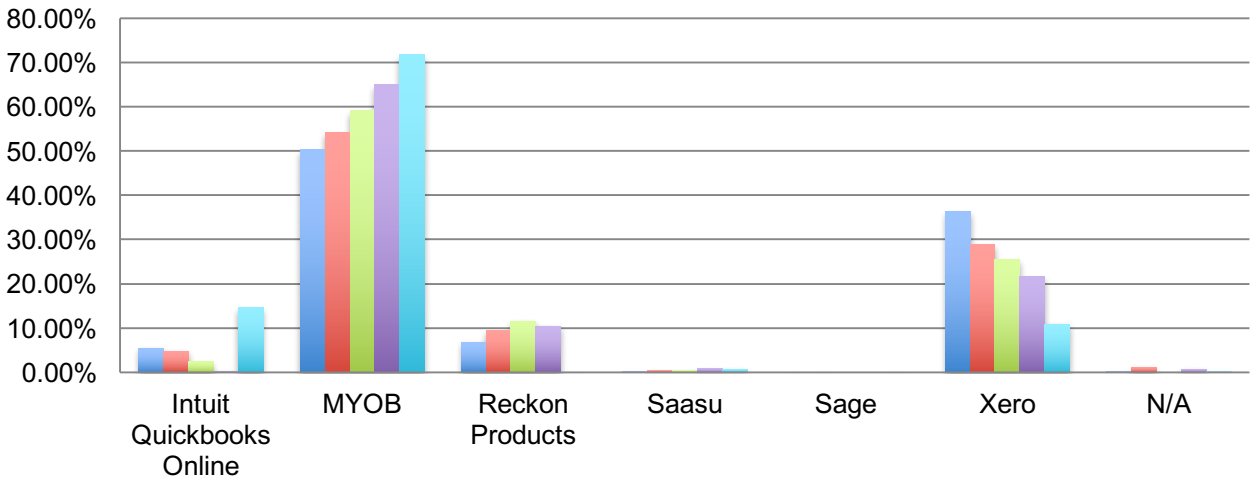


What is your preferred method for invoicing clients?

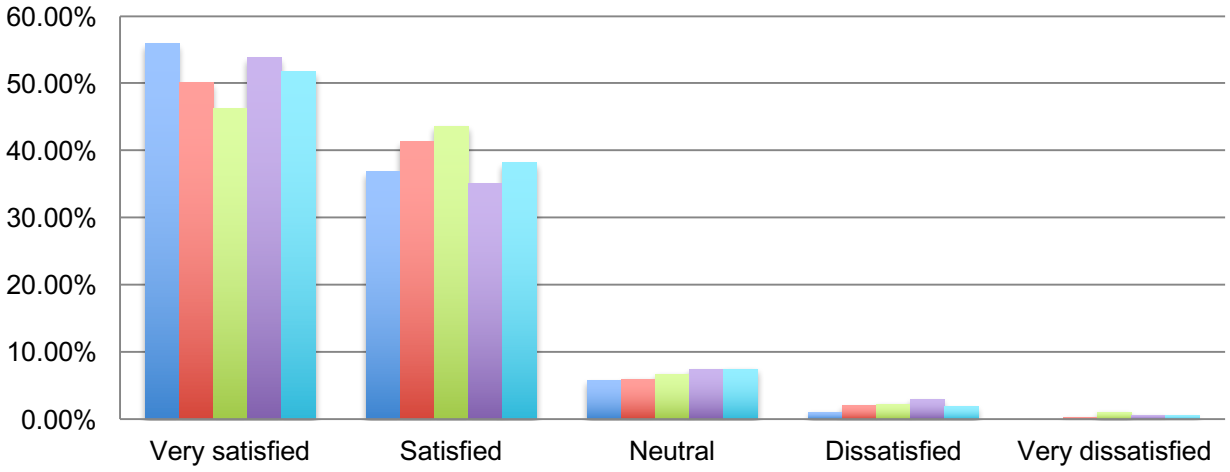


Software

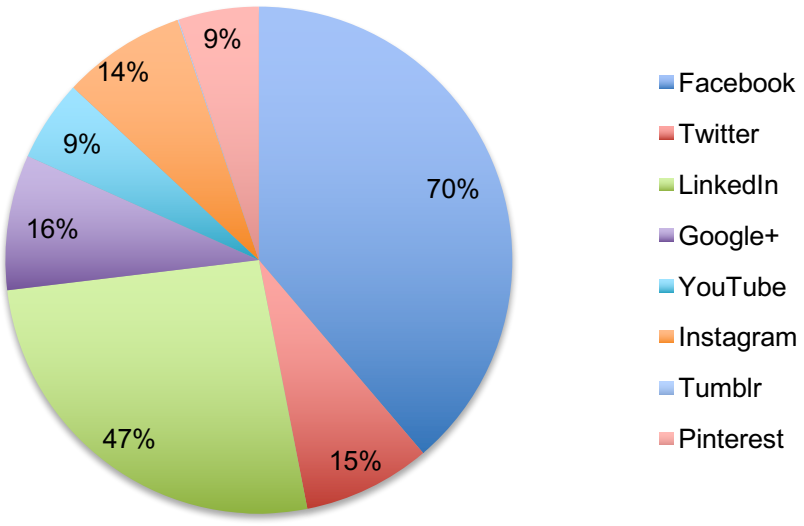
Which software do you use personally for/in your business?



Thinking of the software you use personally for your business, how satisfied are you with it?



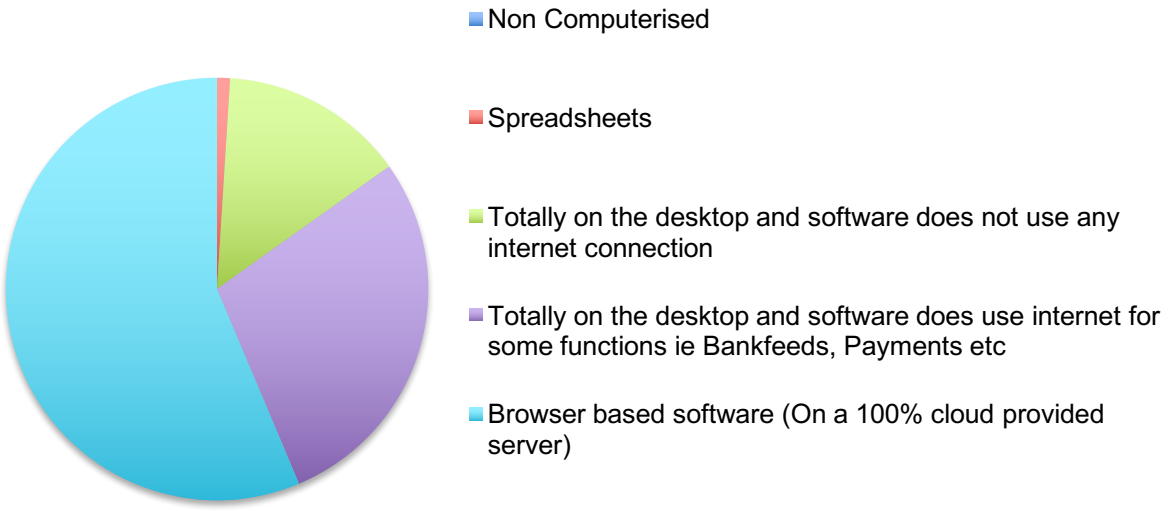
What Social Media platforms do you use?

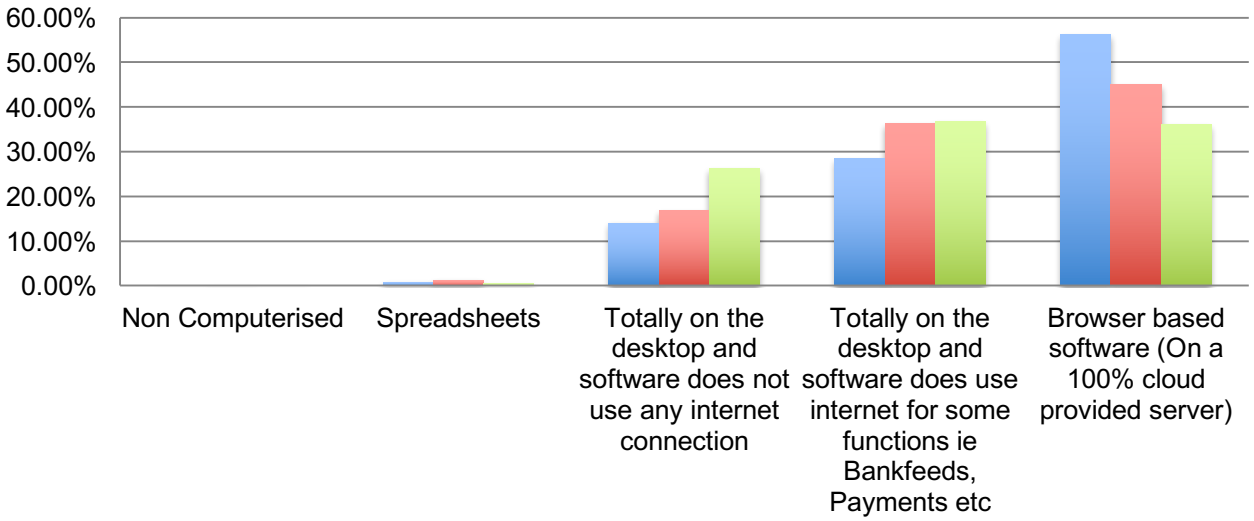


Consistent with last years survey responses, the most popular social media platform is Facebook (70%), followed by LinkedIn (47%), this is consistent with 2015 where the answers were 76% and 55% respectively.

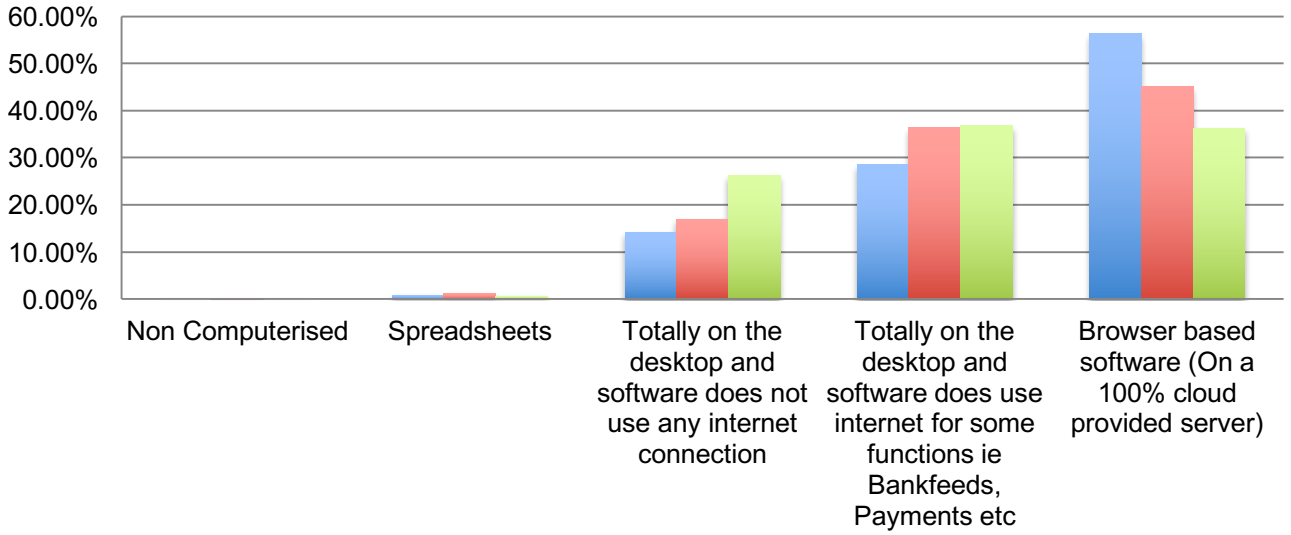
Bookkeepers in Business Only

Which of the following best describes the Accounting Software you use for your business?

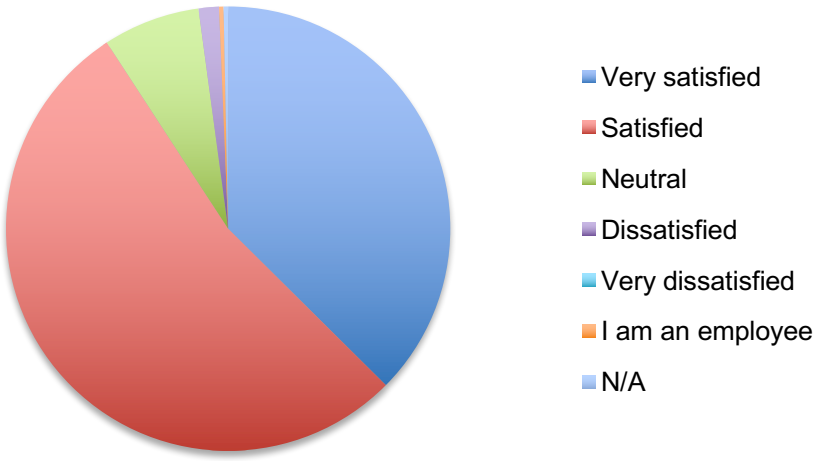




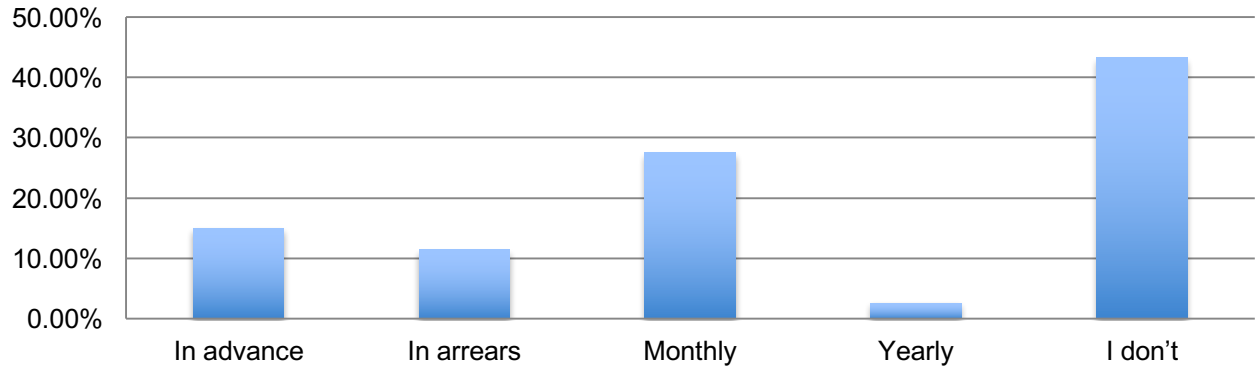
What software do you use with your clients?



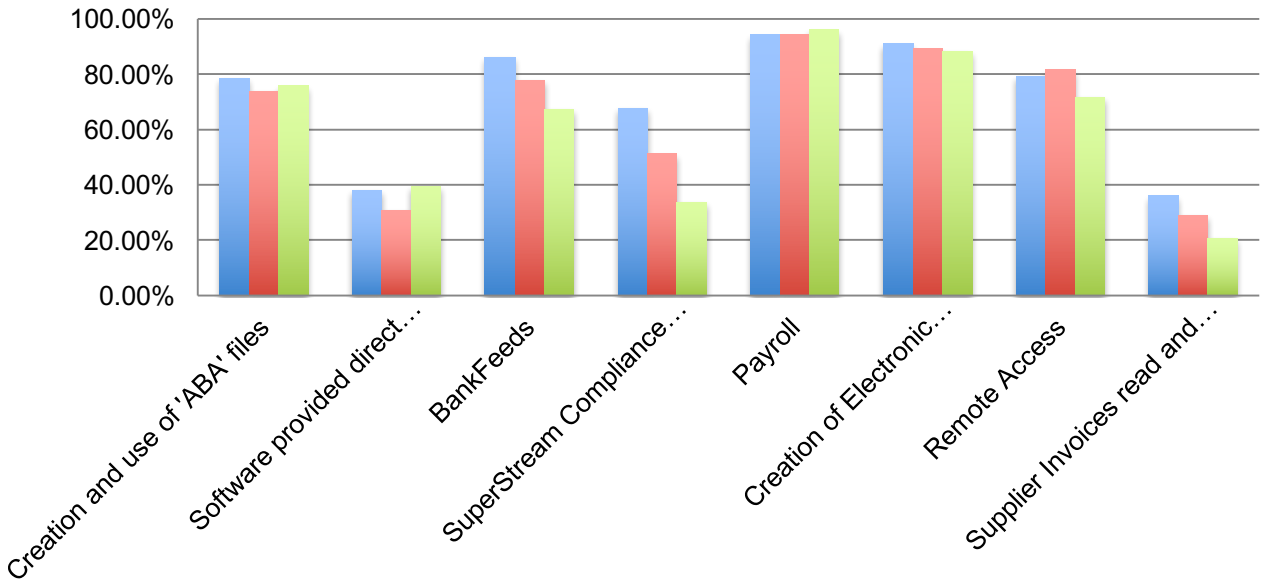
How satisfied are you with the software you use for your clients?



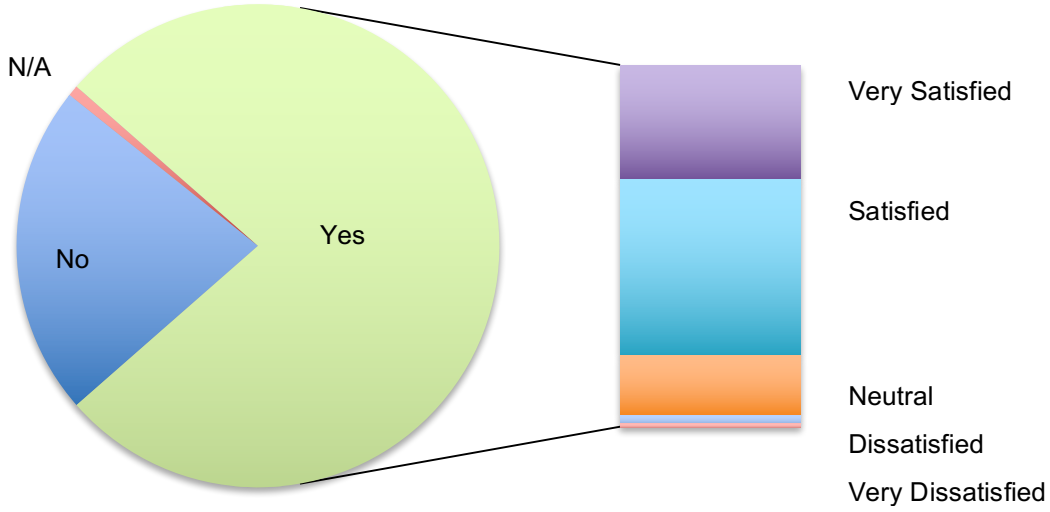
How do you bill your clients for their software subscription?



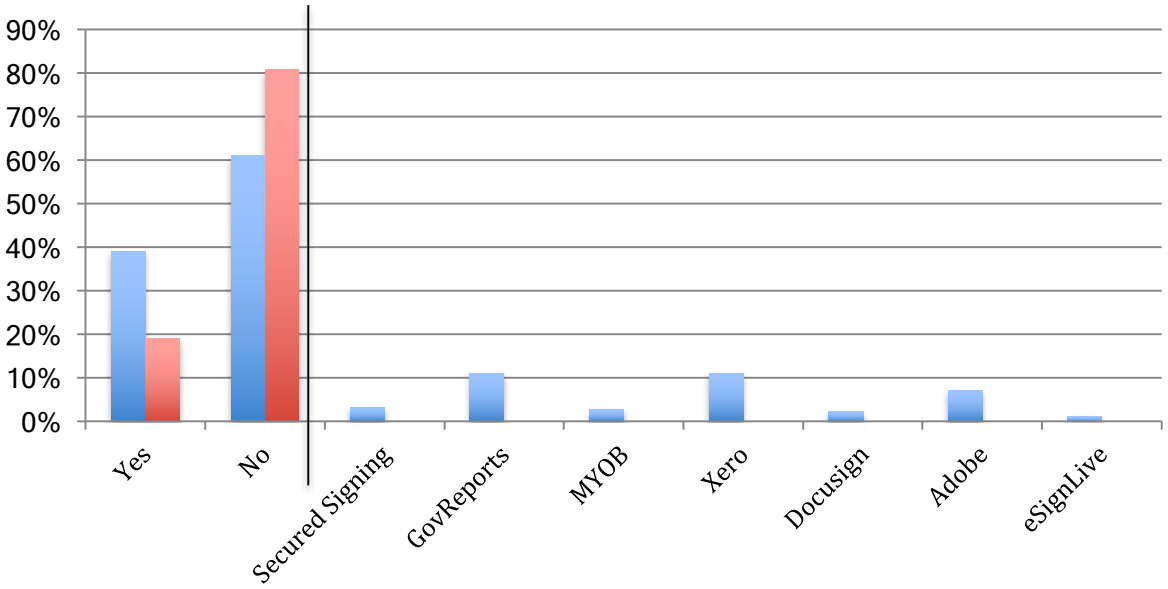
Indicate which of the following software features you comfortably and competently use.



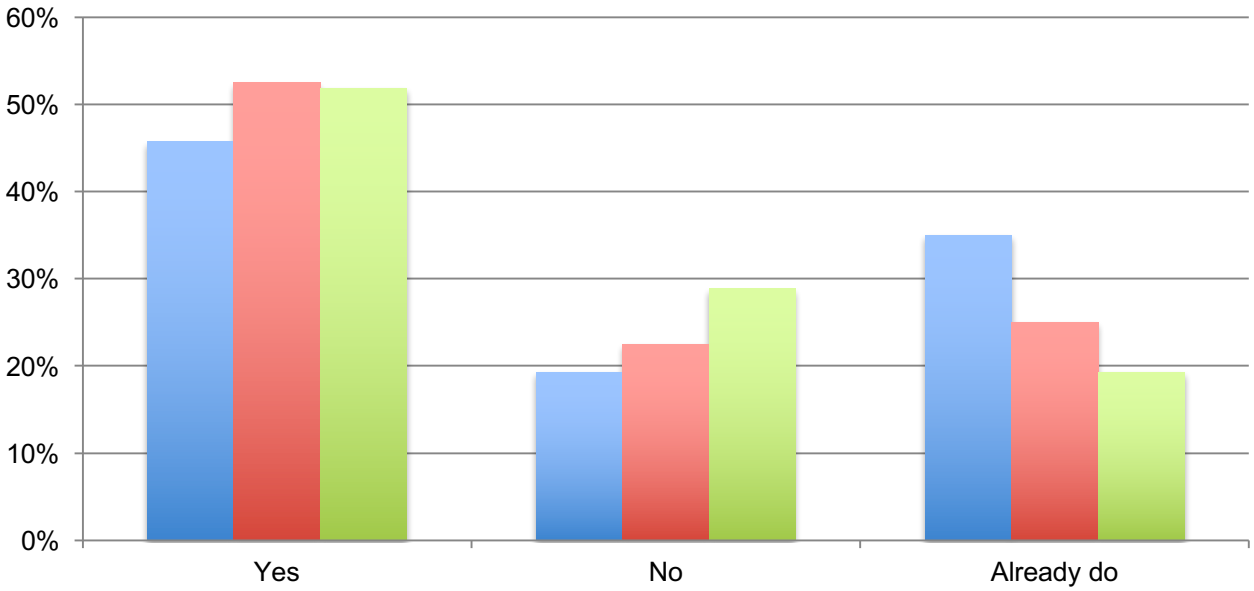
Are you a member of a software partner program? If yes, how satisfied are you with it?



Do you obtain Electronic/Digital Signatures from your clients?
**new options for 2016*

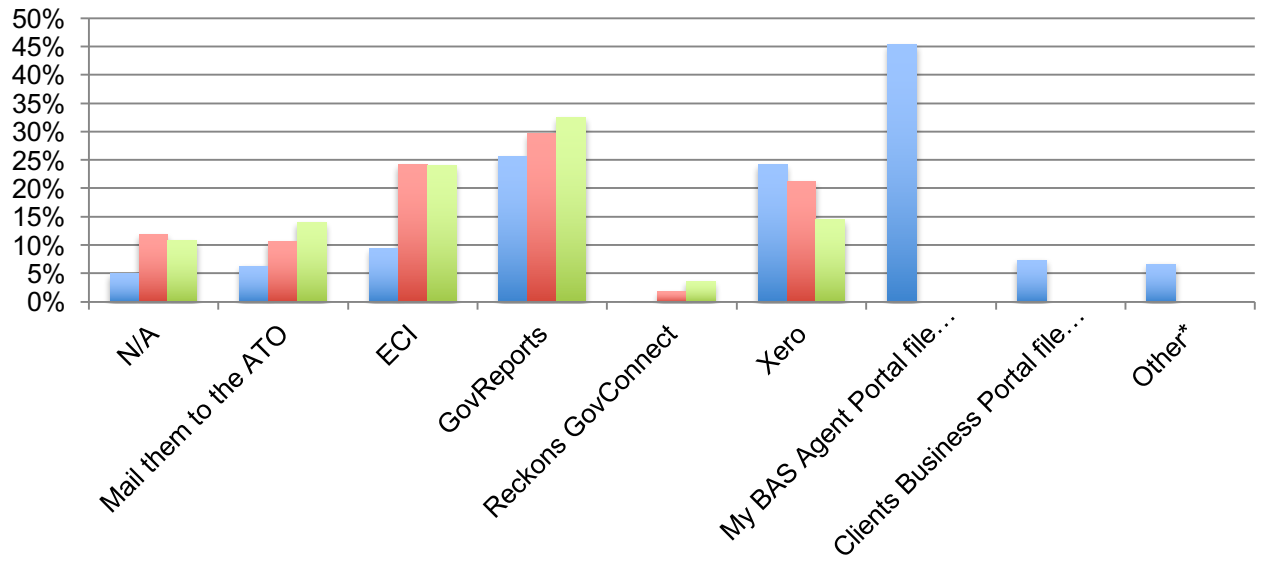


Bookkeepers in Employment Only Questions
Will your business use online accounting in the next 5/10 years?

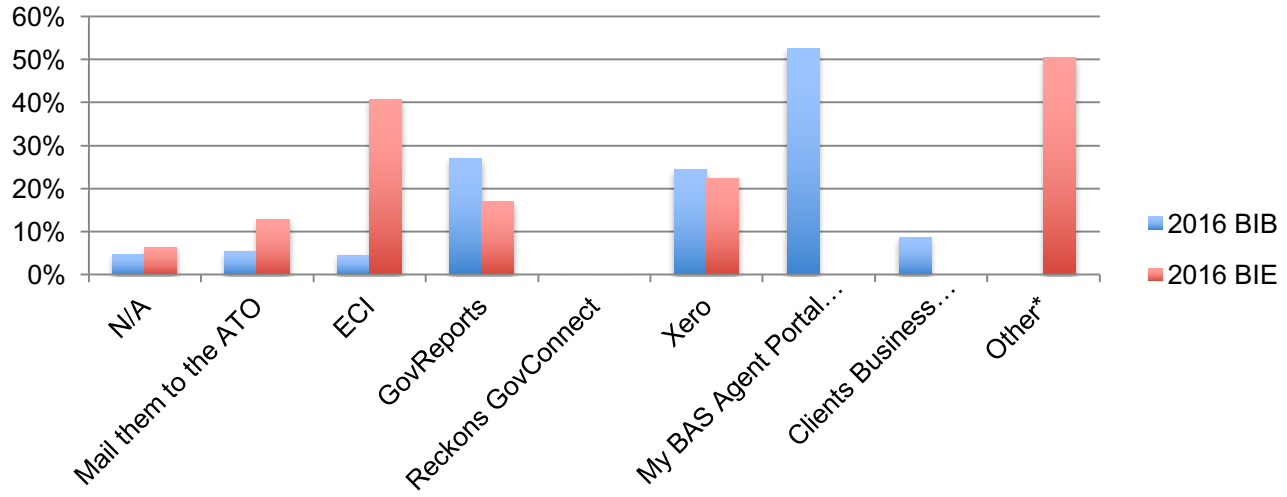


BAS Agent

How do you lodge your end of year payroll Payment Summaries with the ATO?

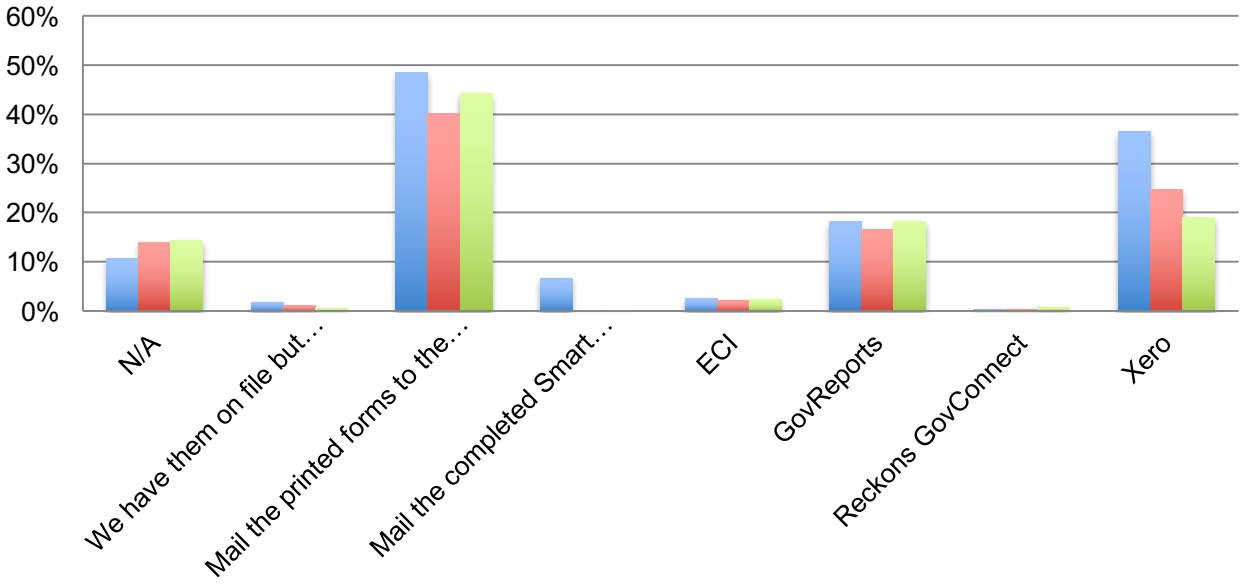


2016 Bookkeepers in Business comparison with 2016 Bookkeepers in Employment

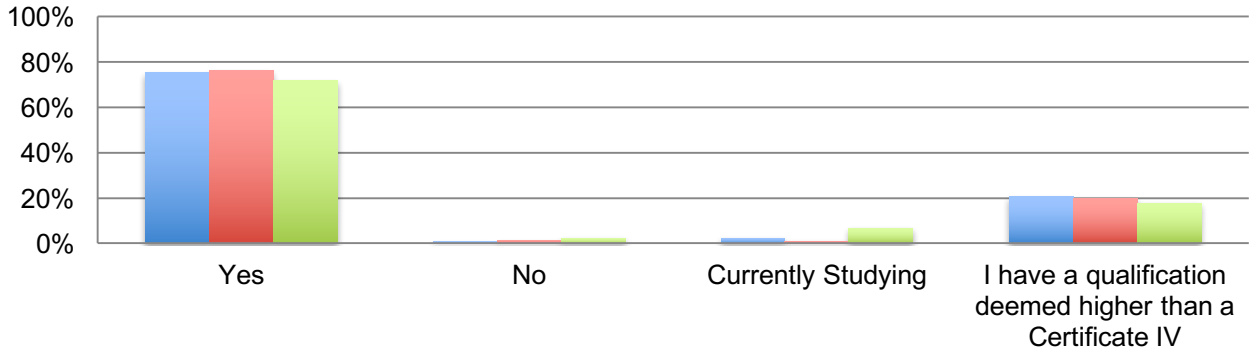


New options for 2016 include; “My BAS Agent Portal file”, “Clients Business Portal file” (Bookkeepers in Business only) and “Other” (Bookkeepers in Employment only).

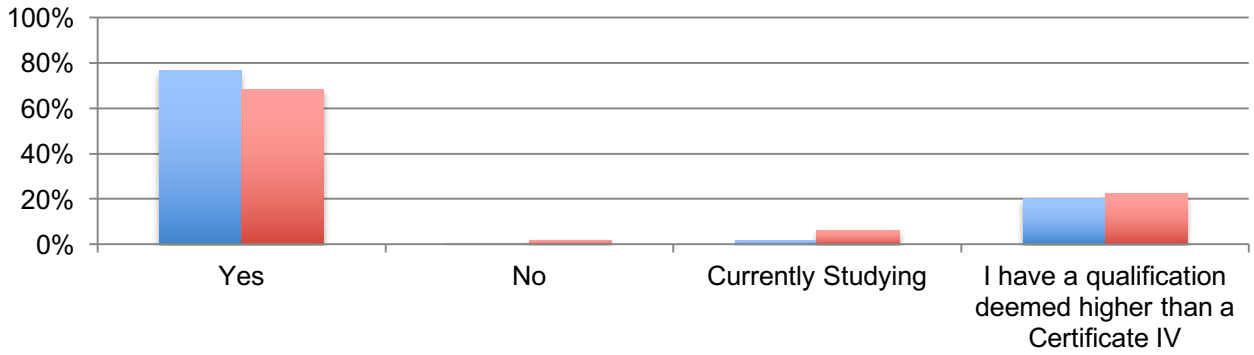
How do you lodge the employee TFN Declarations?



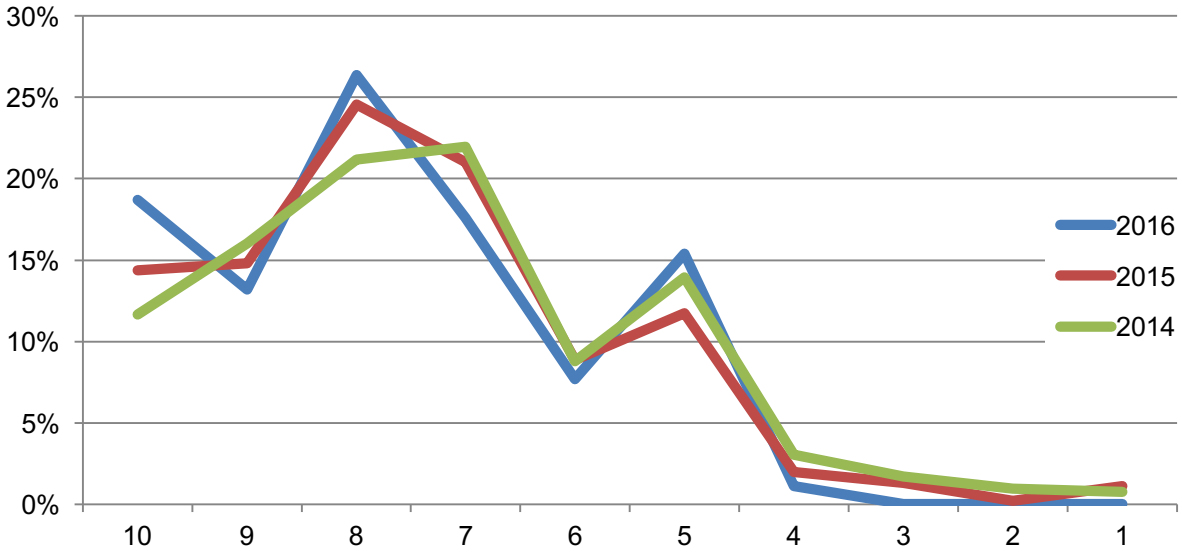
Do you have a Certificate IV in Bookkeeping or Accounting?



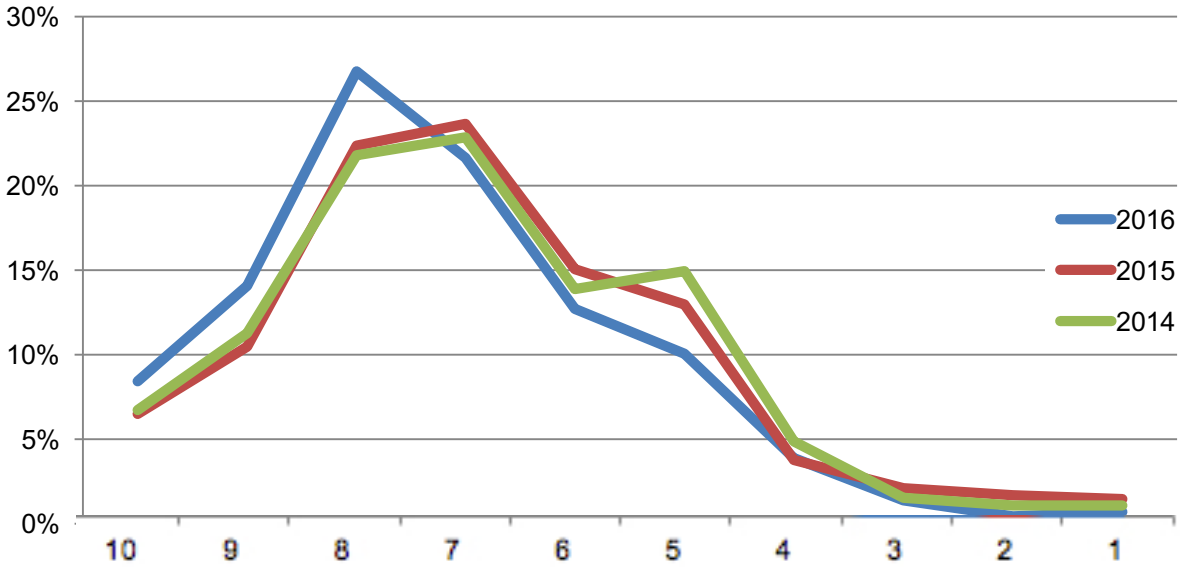
2016 Bookkeepers in Business comparison with 2016 Bookkeepers in Employment



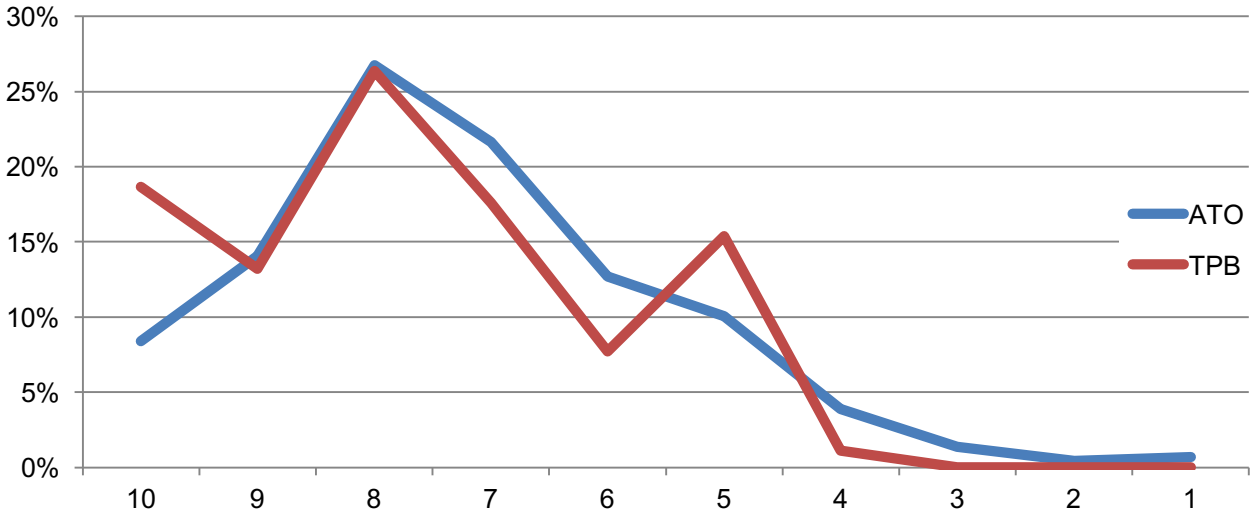
On a scale of 1 to 10, how satisfied are you with the Tax Practitioners Board?



On a scale of 1 to 10, how satisfied are you with the ATO?

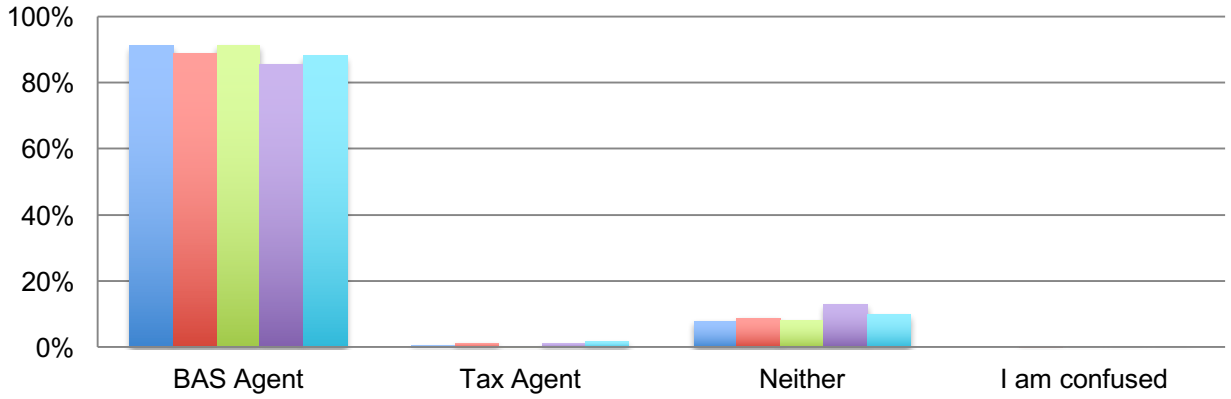


Do we prefer the ATO or the TPB?

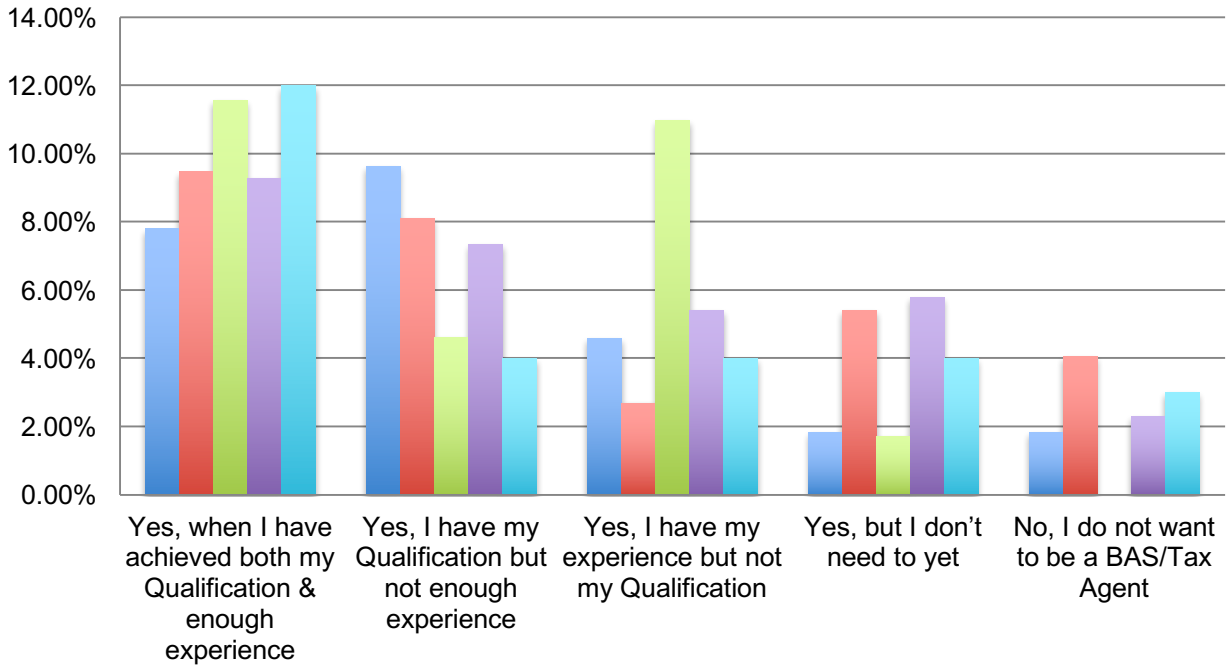


Bookkeepers in Business Only Questions

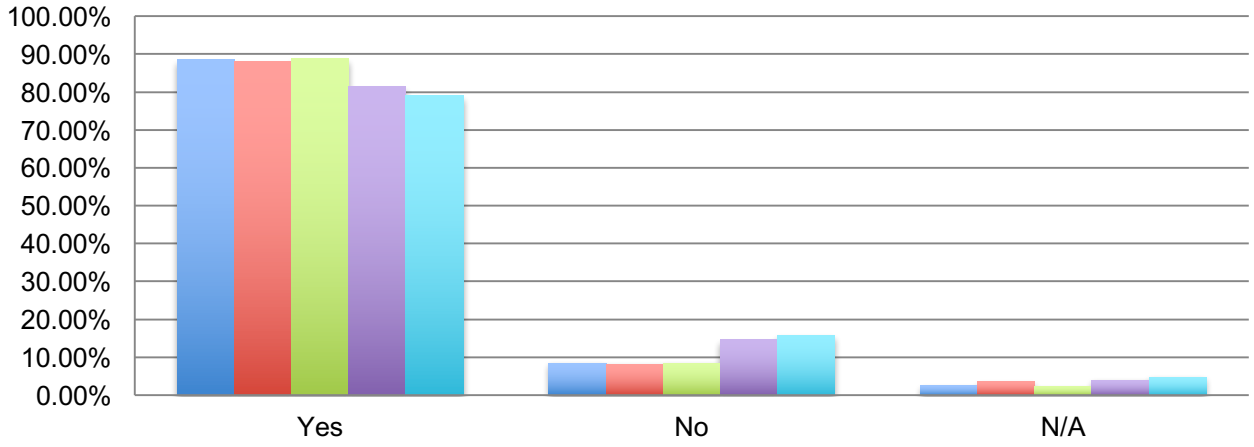
Which of the following are you?



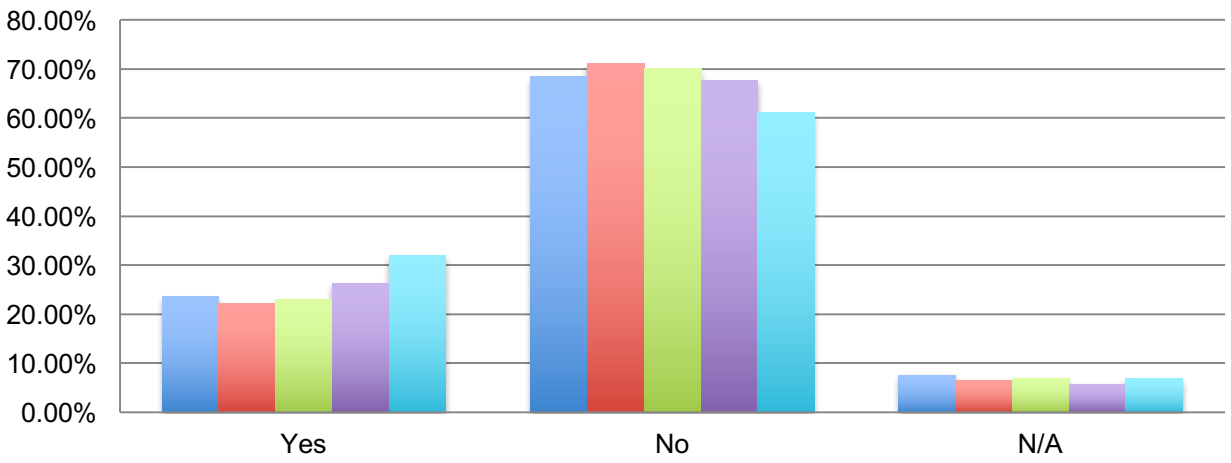
If you are not currently registered, do you intend to register?



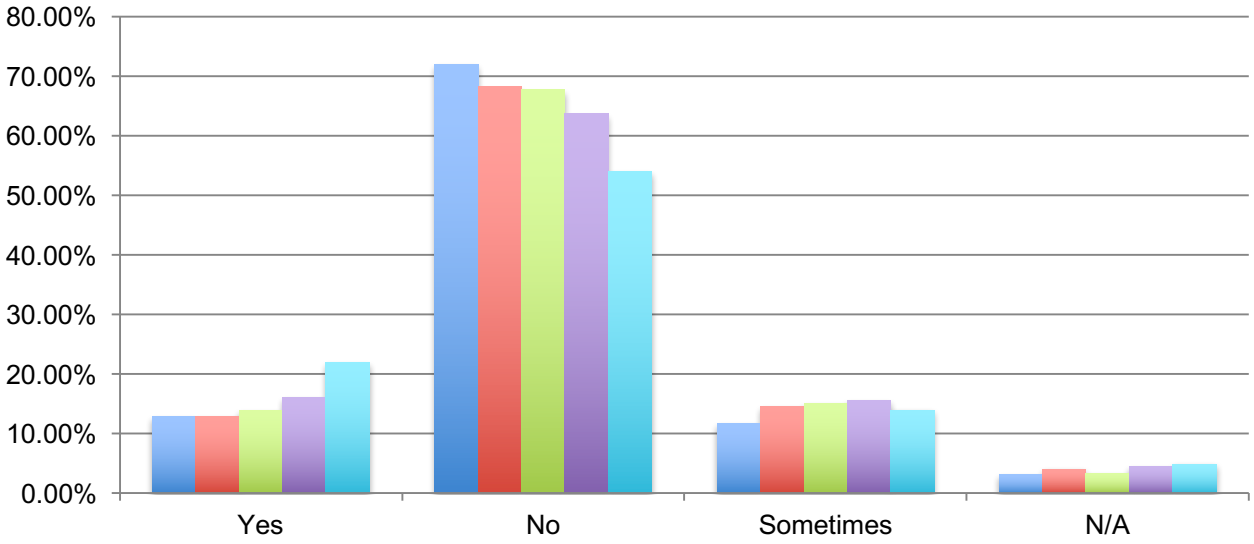
Do you use the ATO's BAS Agents portal?



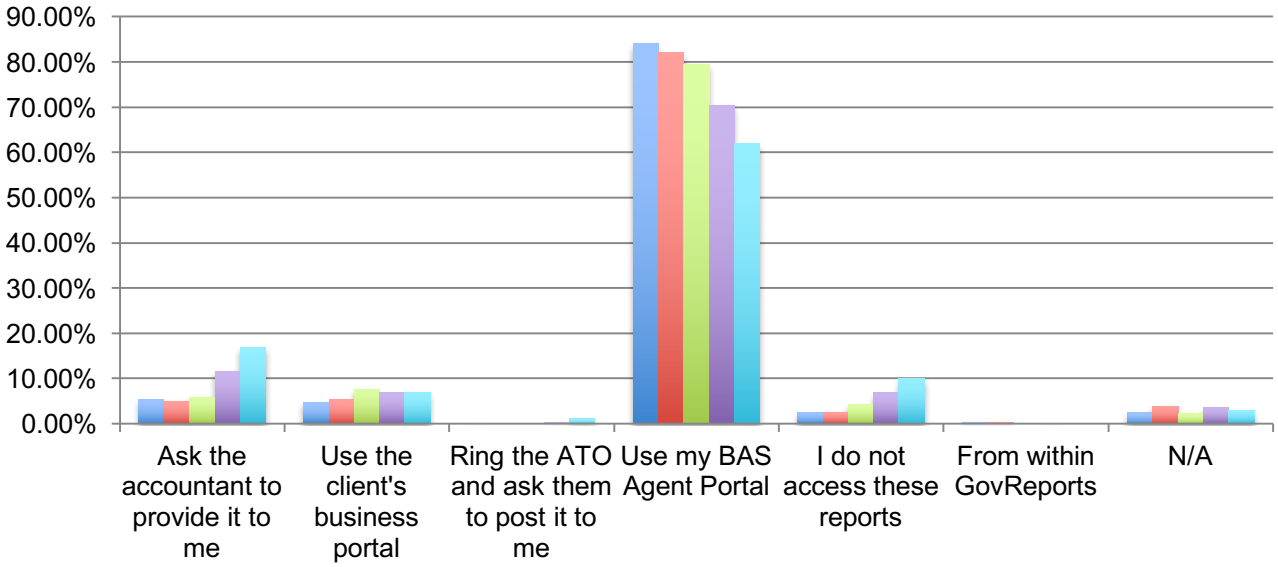
Do you use ECI?



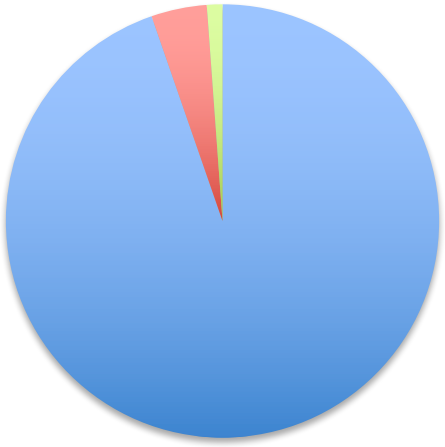
Do you use your client's business portal?



How do you obtain the Integrated Client Account or Running Balance Report for your clients?

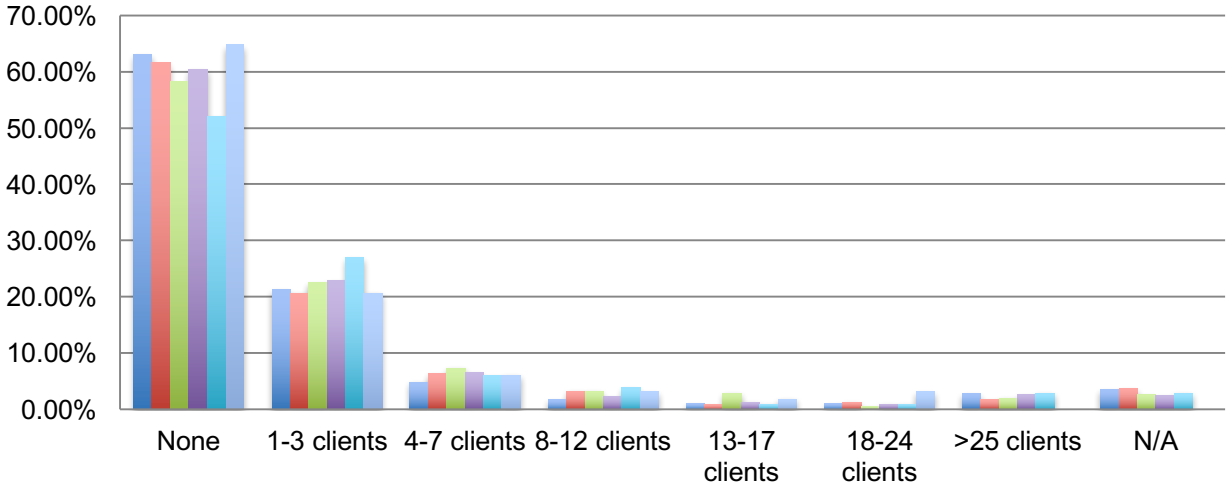


Do you have your own Auskey?

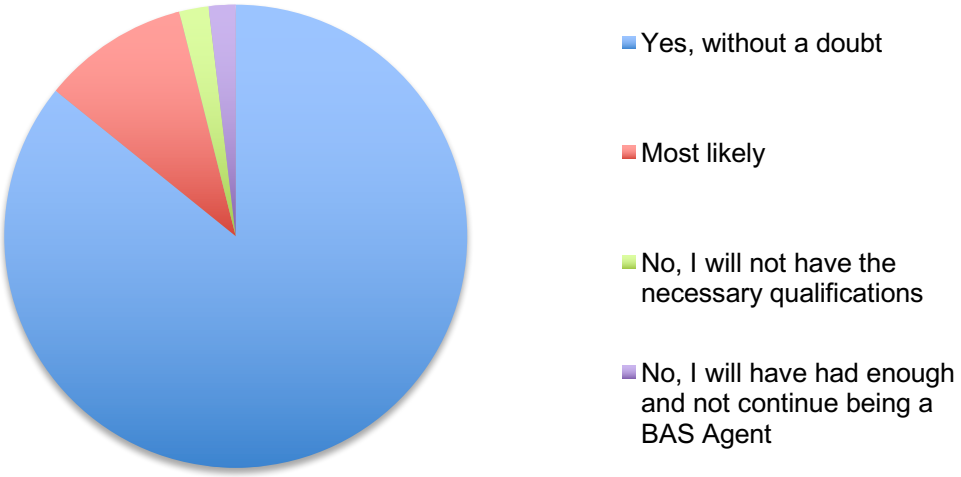


94.7% of Bookkeepers in Business answered yes, while 4% answered no in 2016. This is similar to 2015, where 94.6% answered yes and 4% answered no and 2014 (95% and 4.3%). It has continued the trend of the gradual increase seen from 2013 (88.2% and 10%) and 2012 (88% and 10%).

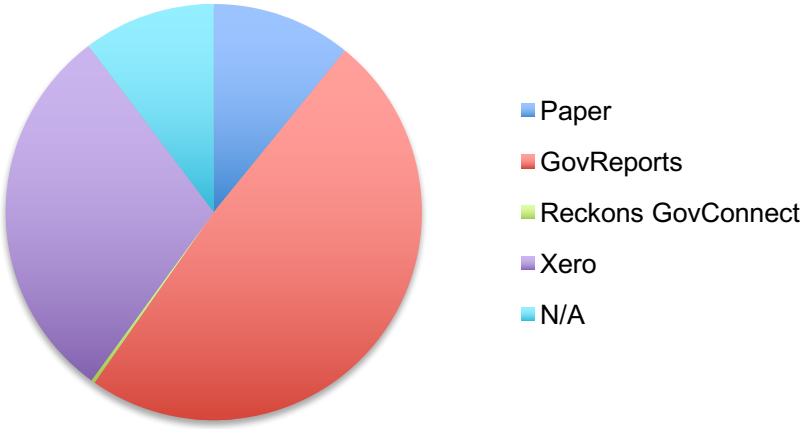
How many of your clients do you have access to their Auskey?

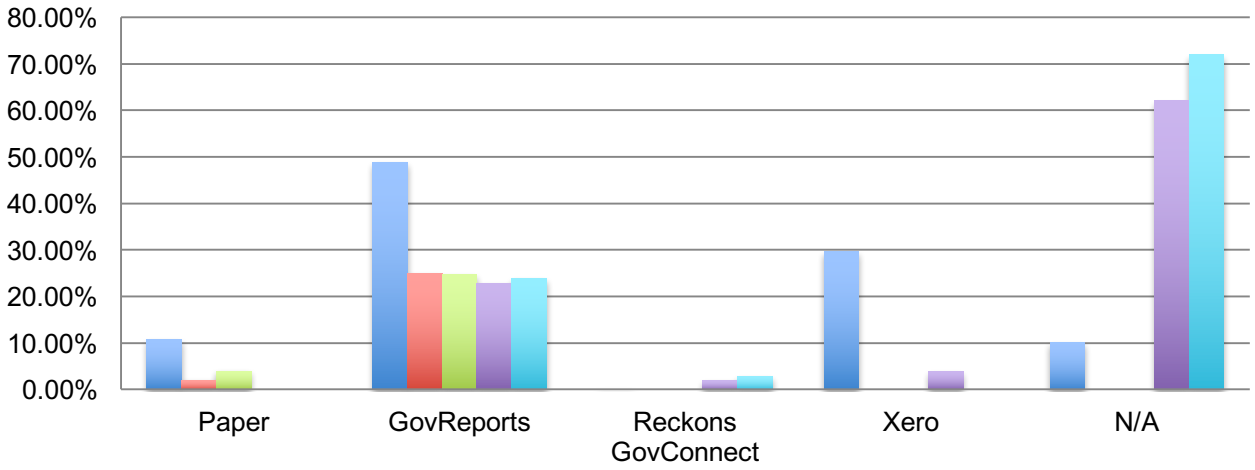


Will you renew your BAS Agent Registration when it is next due?



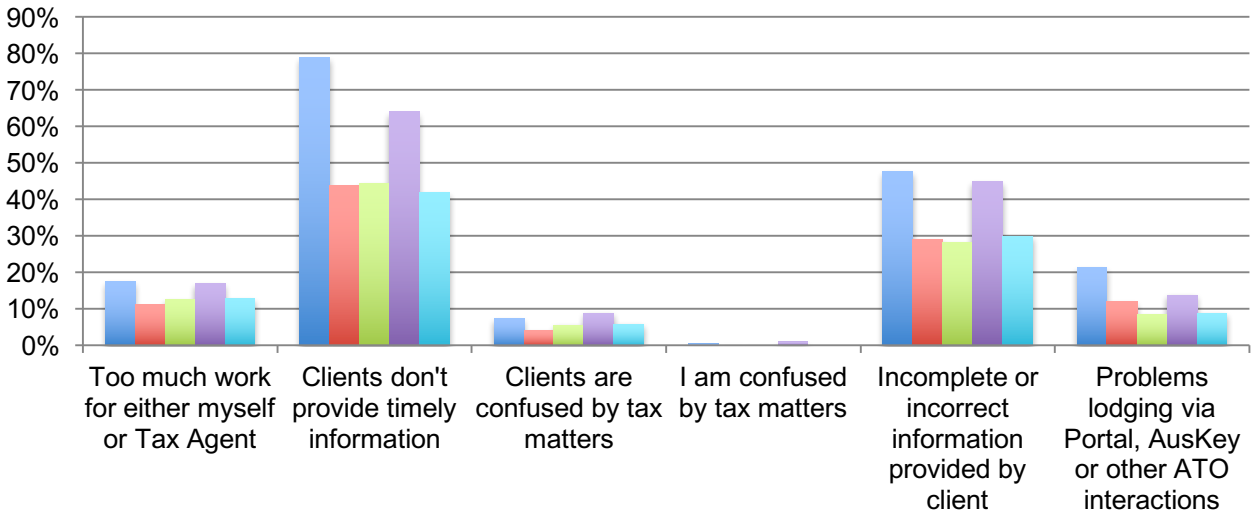
How do you lodge the BAS for your Clients?





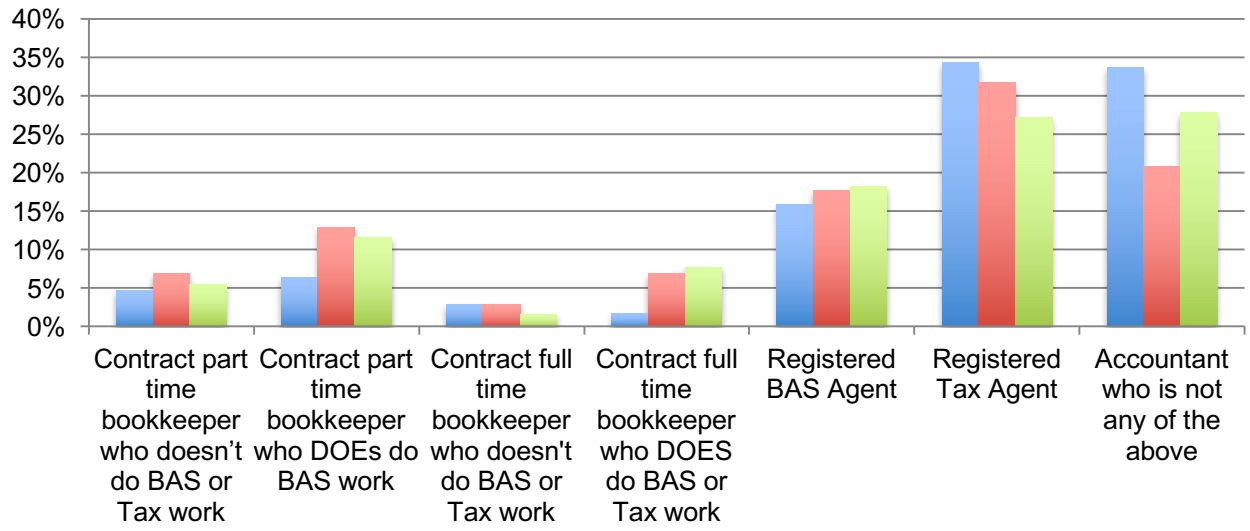
The options for this question have changed in 2016. They are now “Paper”, “GovReports”, “Reckons GovConnect”, “Xero” or “N/A”. In 2015, the options were “Paper”, “GovReports”, “Lodged on the client business portal”, “BAS is sent to the Accountant”, “I use ECI to lodge”, “I use the BAS portal to lodge”, or “Other SBR lodgement”.

What are the biggest barriers to lodging your clients’ activity statements by the due date?

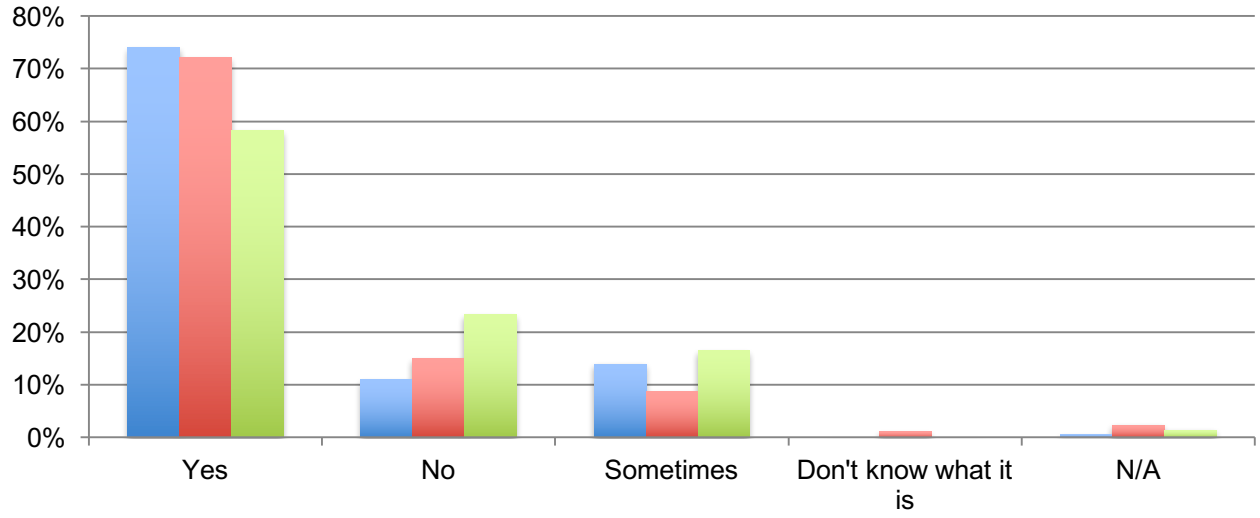


Bookkeepers in Employment Only Questions

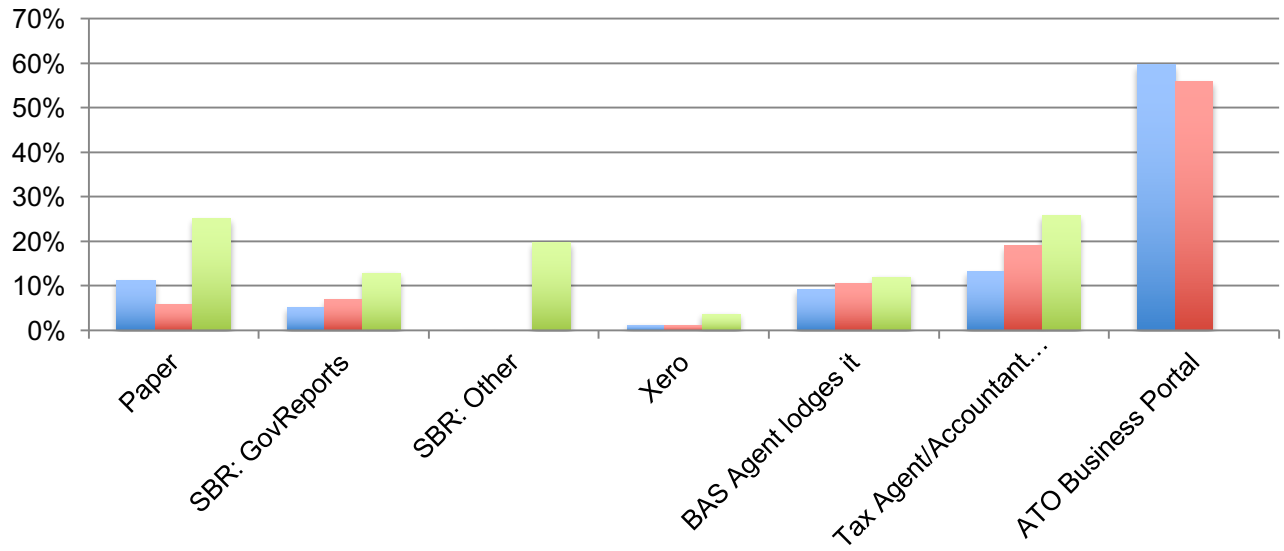
Which of the following does your business interact with?



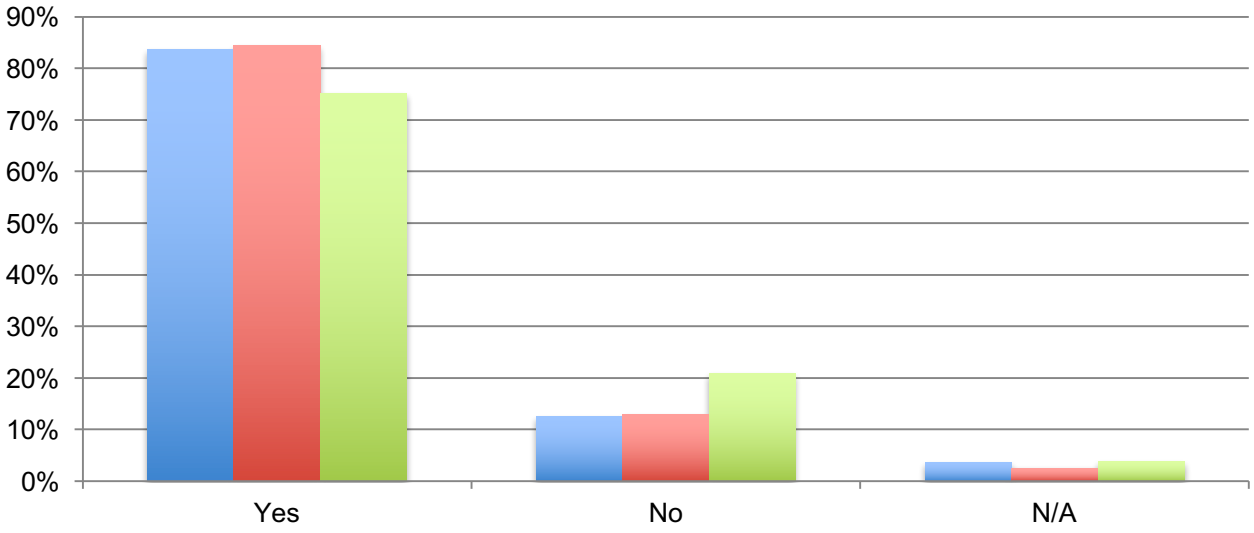
Do you use the ATO Business Portal?



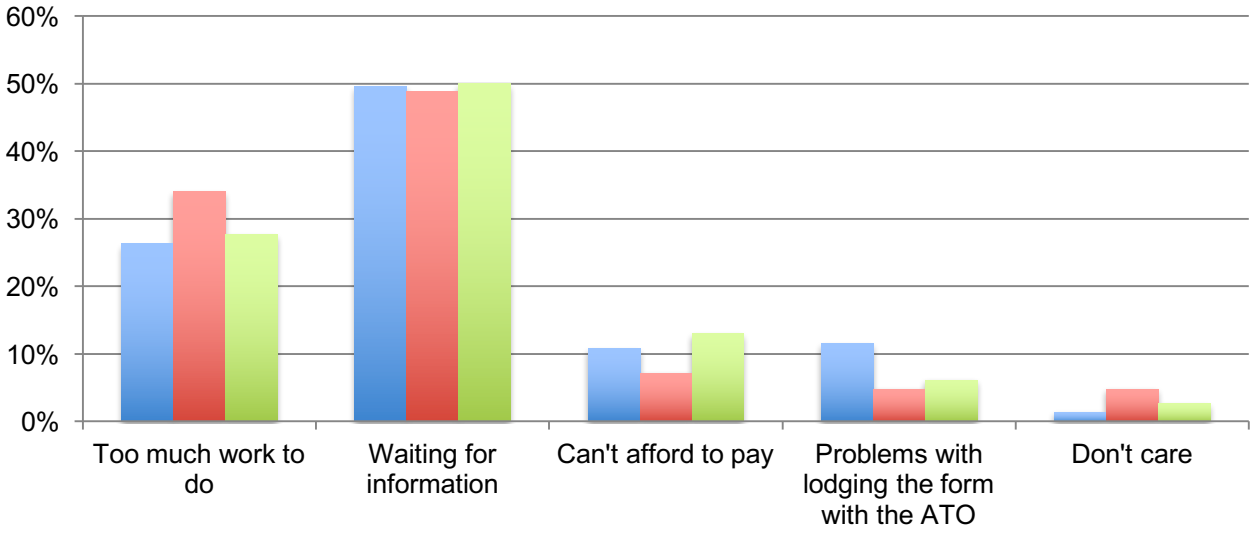
How do you lodge the BAS for the business?



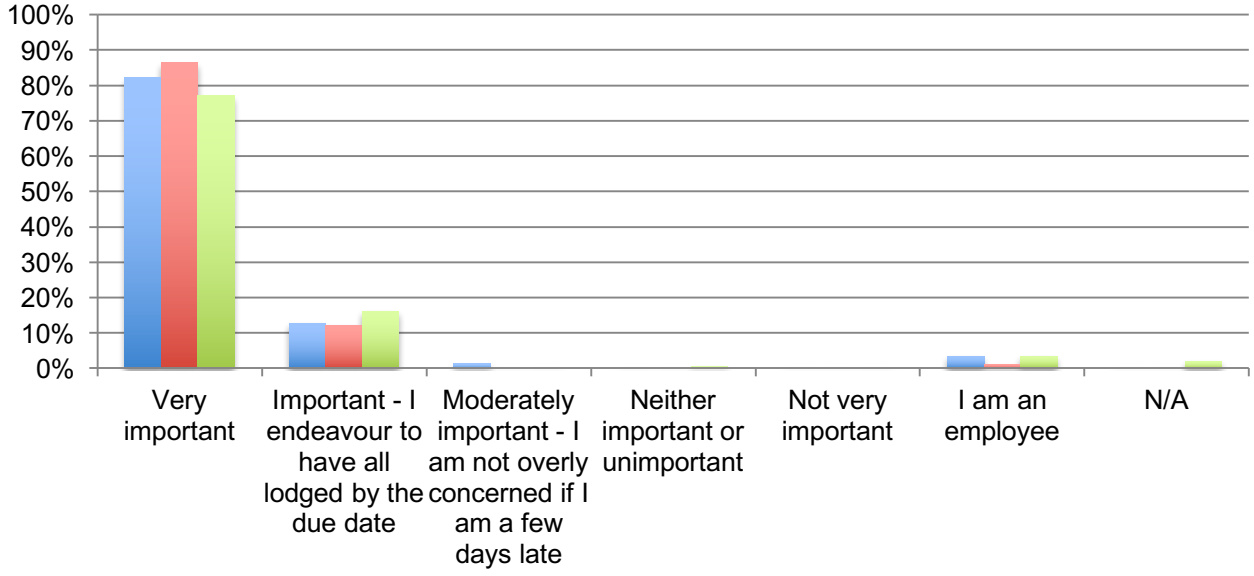
Does the business have it's own Auskey?



What are the biggest barriers to lodging your activity statements by the due date?

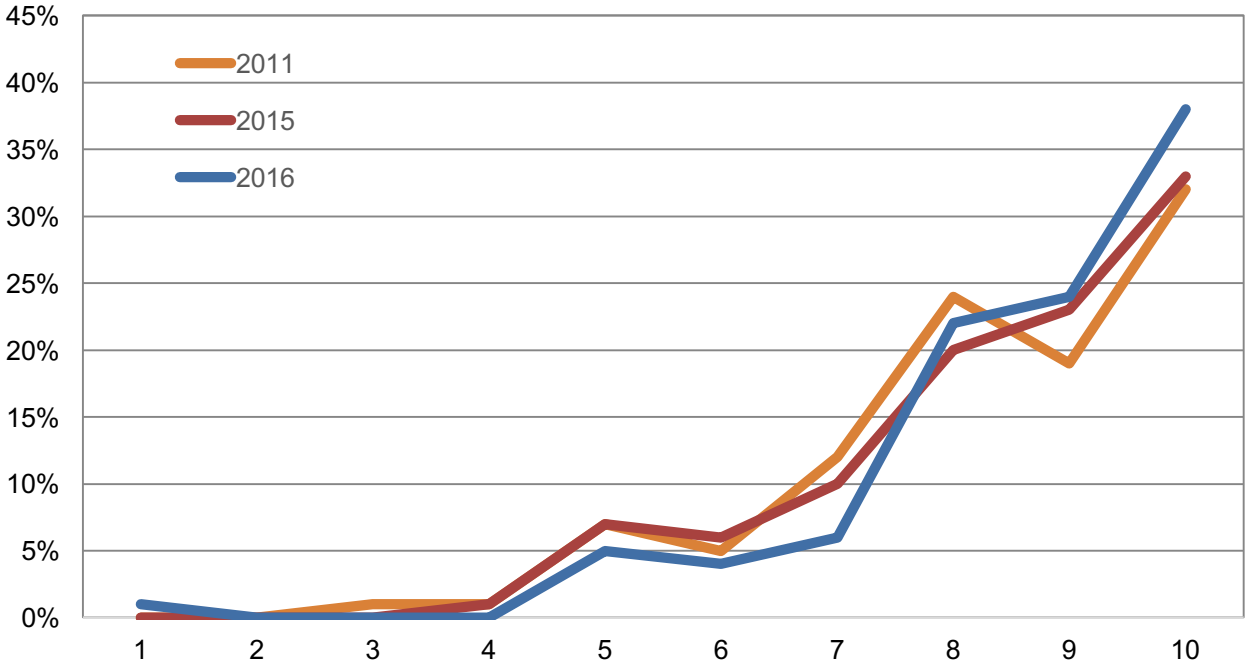


How important do you consider lodging your BAS on time?

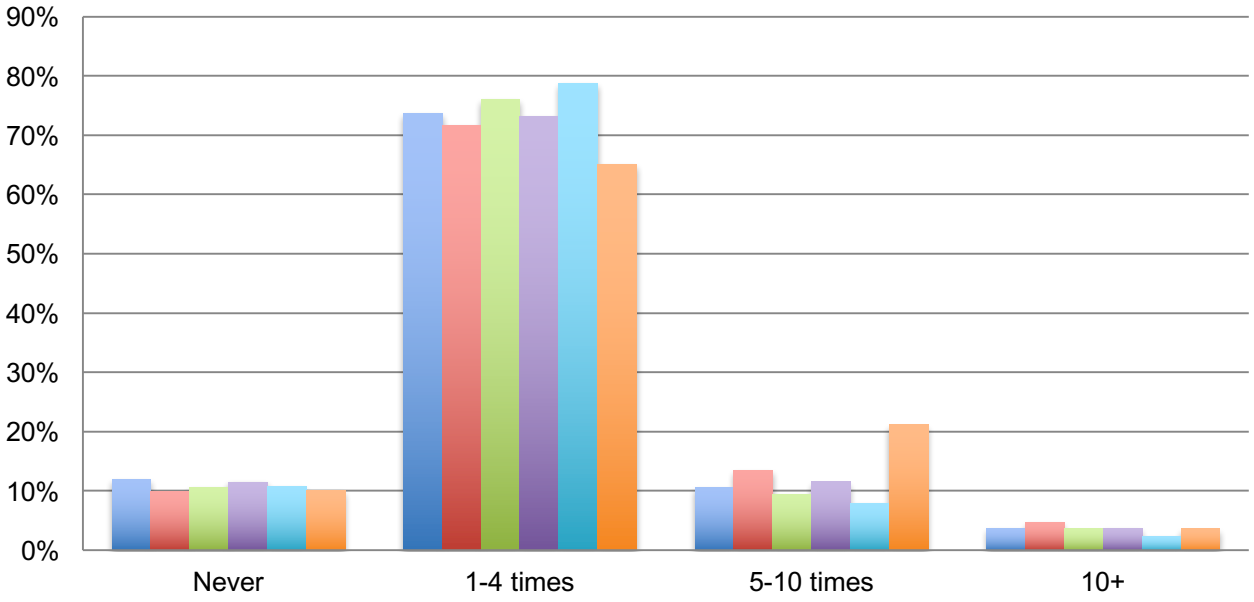


All About ICB

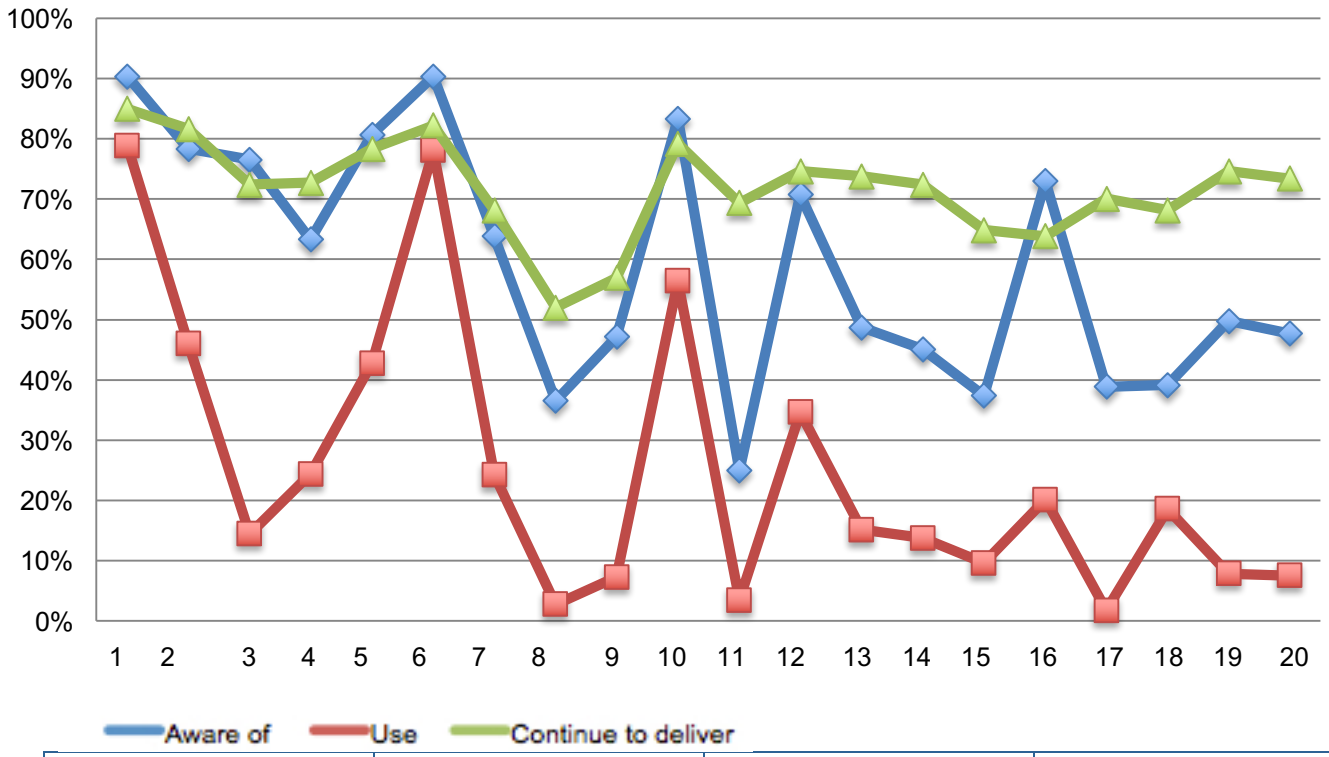
On a scale of 1 to 10, how satisfied are you with ICB?



How many times per month do you visit the ICB Website?

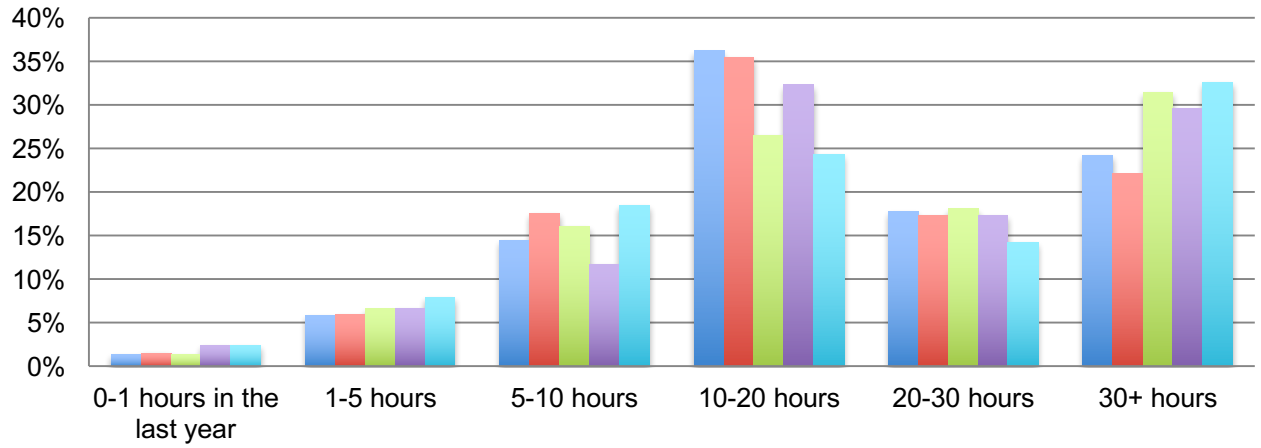


Which ICB Membership Benefits should ICB continue to deliver?



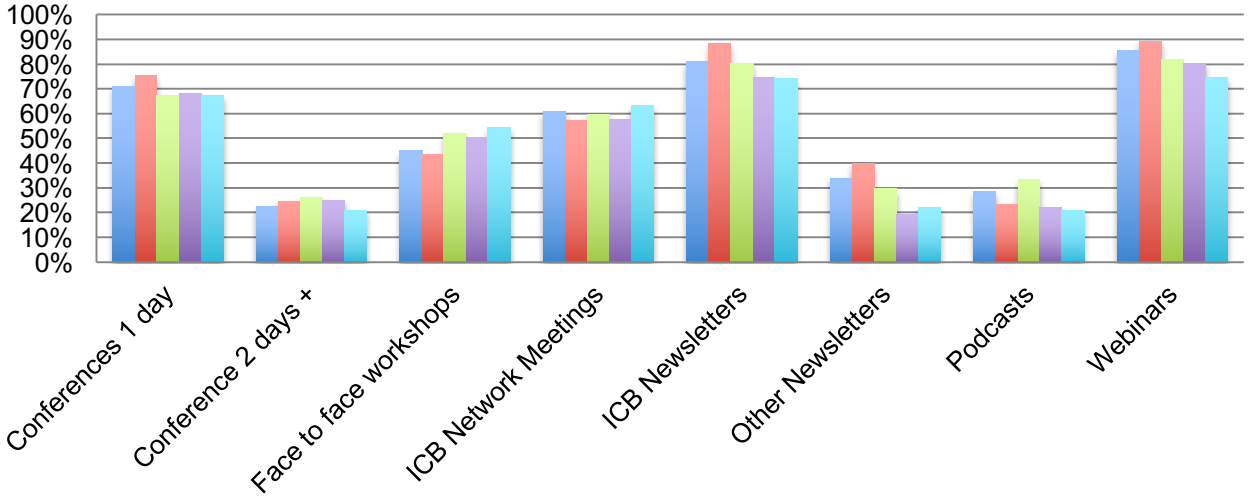
1. ICB resources (checklists/templates/guides)	2. Members phone or email support	3. Find a bookkeeper directory on ICB website	4. Bookkeepers ICB Forum
5. PI Insurance specifically designed and prices for ICB Members	6. Members only newsletter	7. Monthly customisable newsletter for your clients	8. Access to use professional email domain your.name@micb.org.au
9. Access to buy professional ICB name badge	10. Attend ICB network meetings & online webinars for no cost	11. Notification of jobs in your area	12. Use of the ICB crest on stationery
13. Access to preferred education and training options	14. Products & Solutions at special member prices	15. Member Benefits program of discounts and cash back	16. ICB Members Newsletter via podcast
17. Supervising BAS Agent Program	18. ICB Member advantaged price to GovREports	19. Ability to influence ICB lobbying of the ATO and Government	20. Ability to influence TPB policy through ICB Consultations

How much continuing education have you undertaken in the past year?

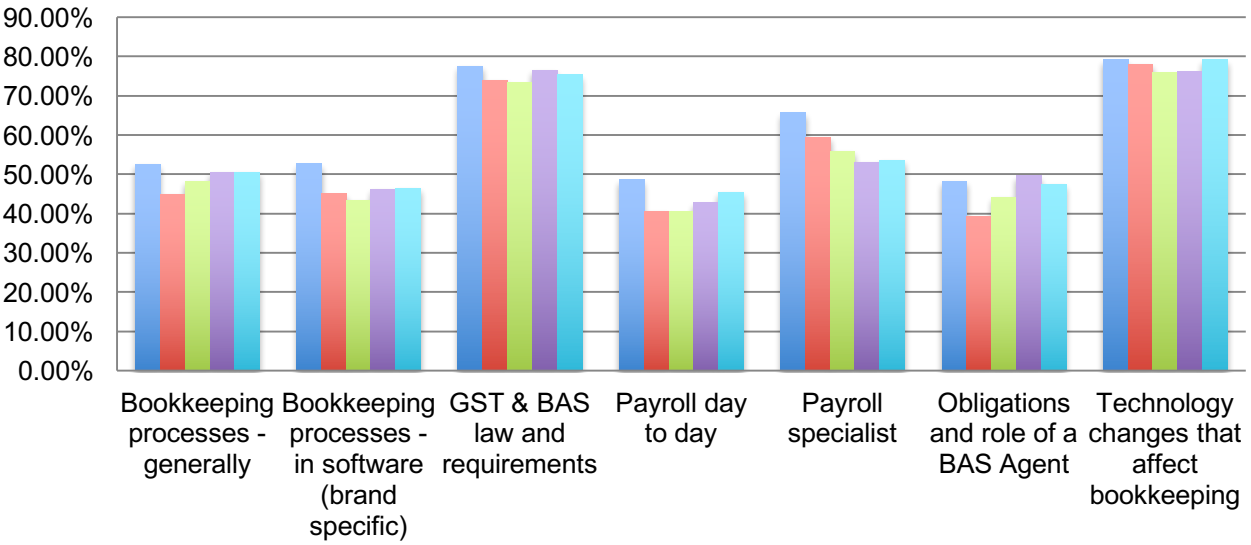




Which format of continuing professional education do you prefer?

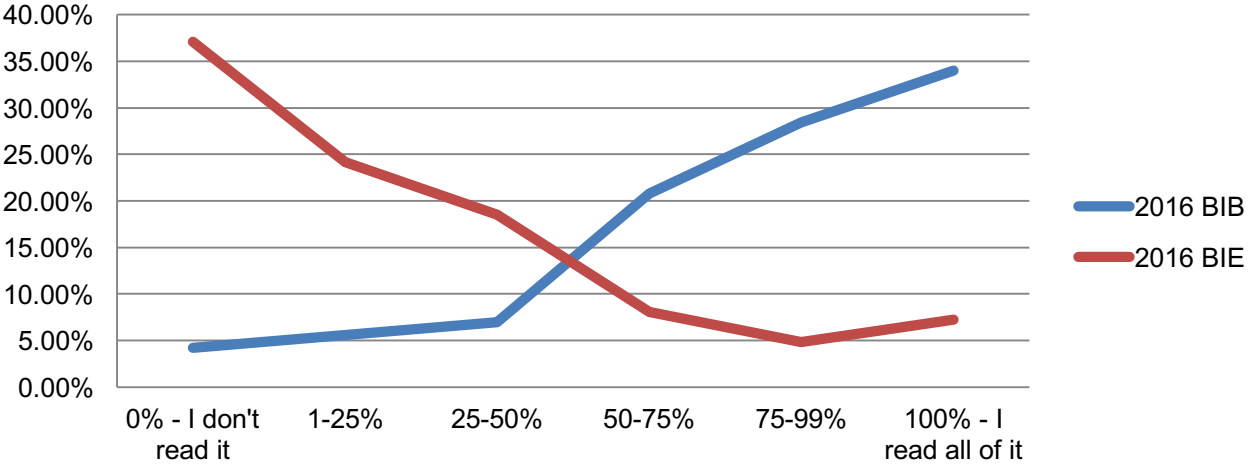


I would like education/information/resources on the following…

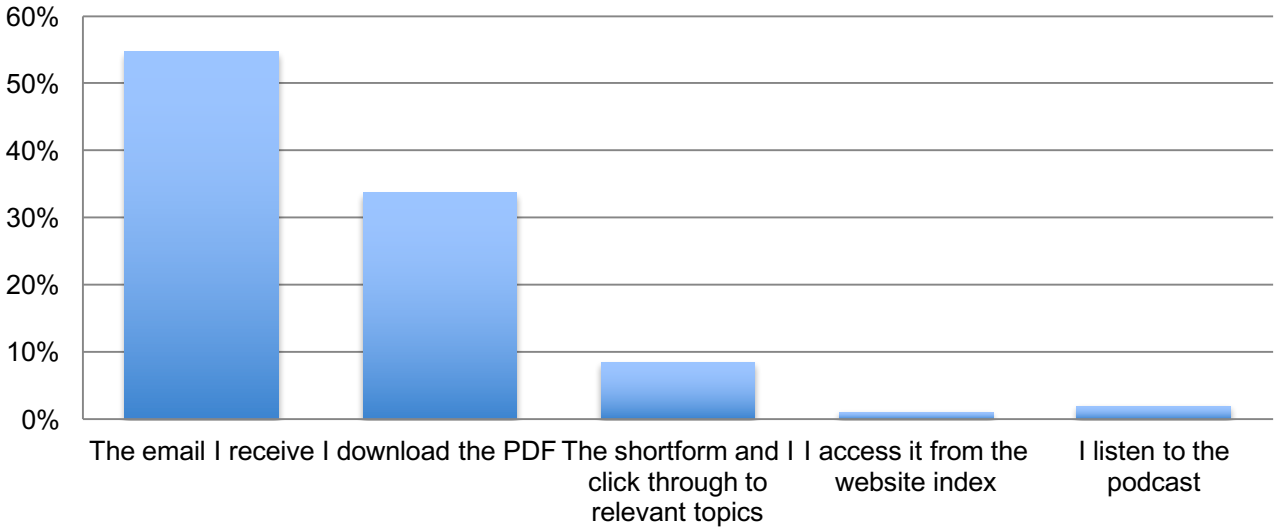


How much of the ICB Newsletter do you read?

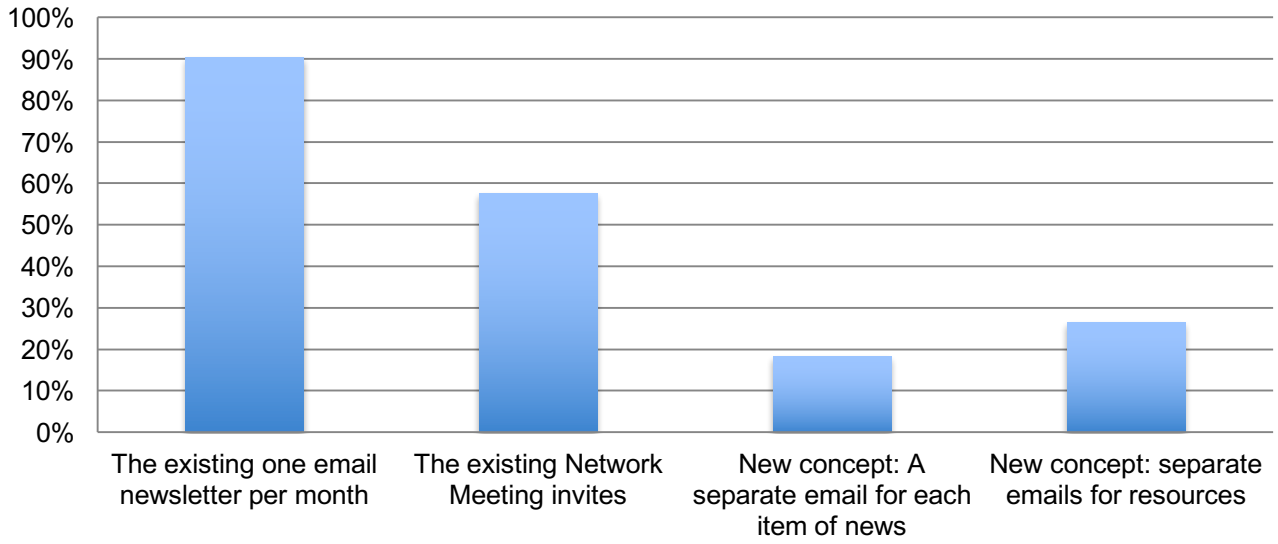
Bookkeepers in Business comparison to Bookkeepers in Employment



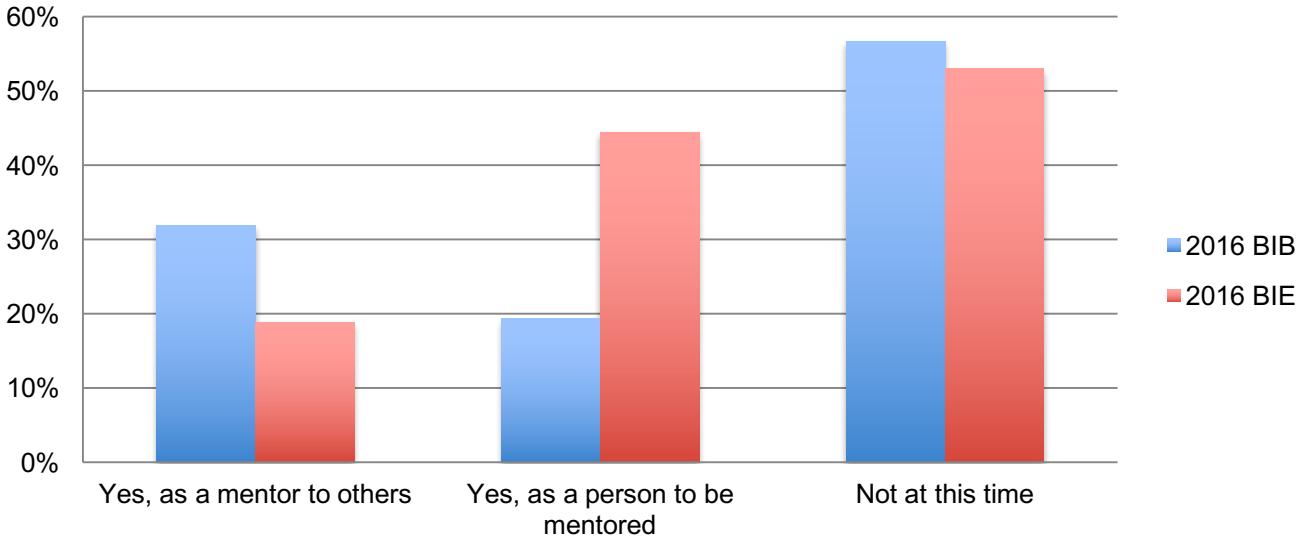
Which format of the ICB Newsletter do you read?



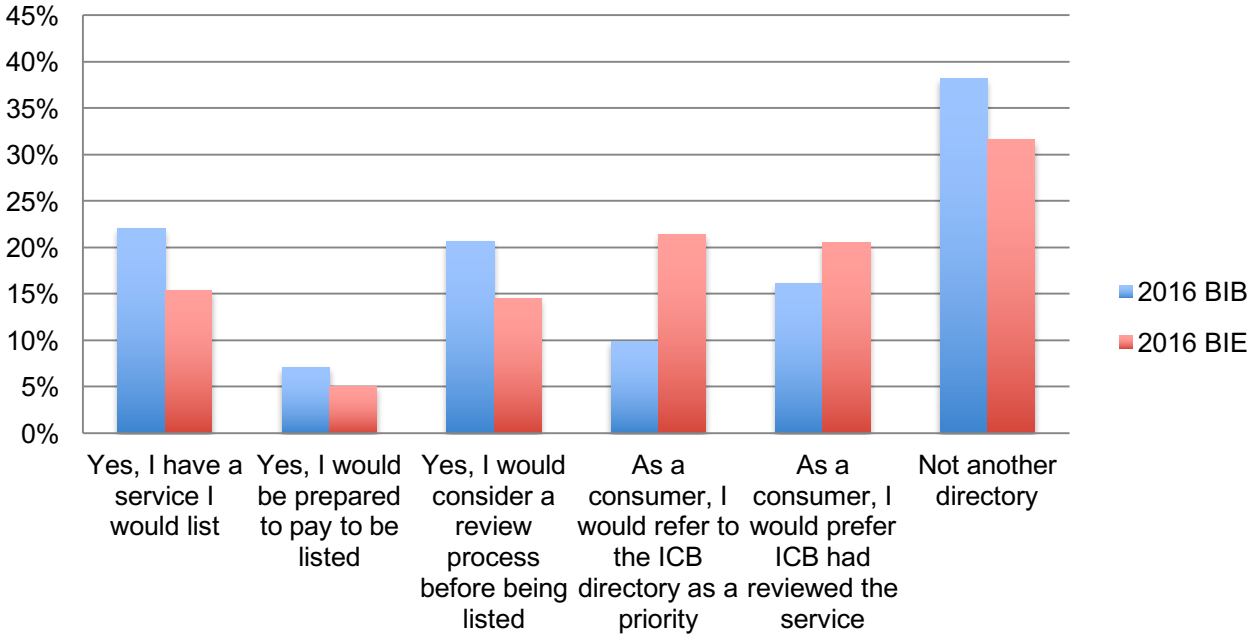
Which version of email updates & news would you prefer?



If ICB were to establish a Bookkeepers Mentoring Program, would you be interested?

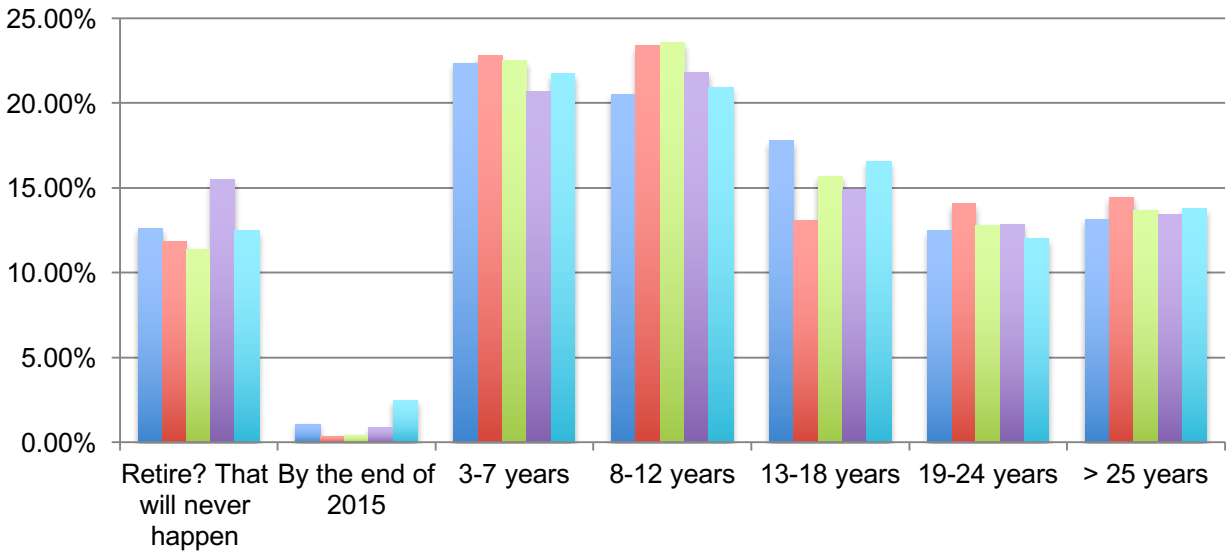


If ICB established a Directory of Services members were willing to provide to other bookkeepers, would you be interested?

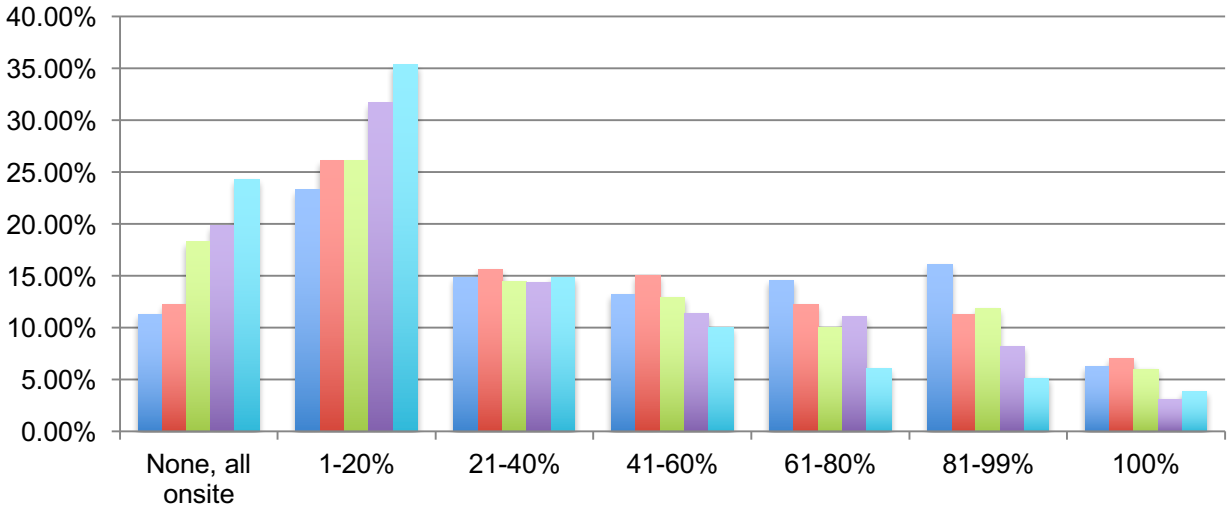


The Future

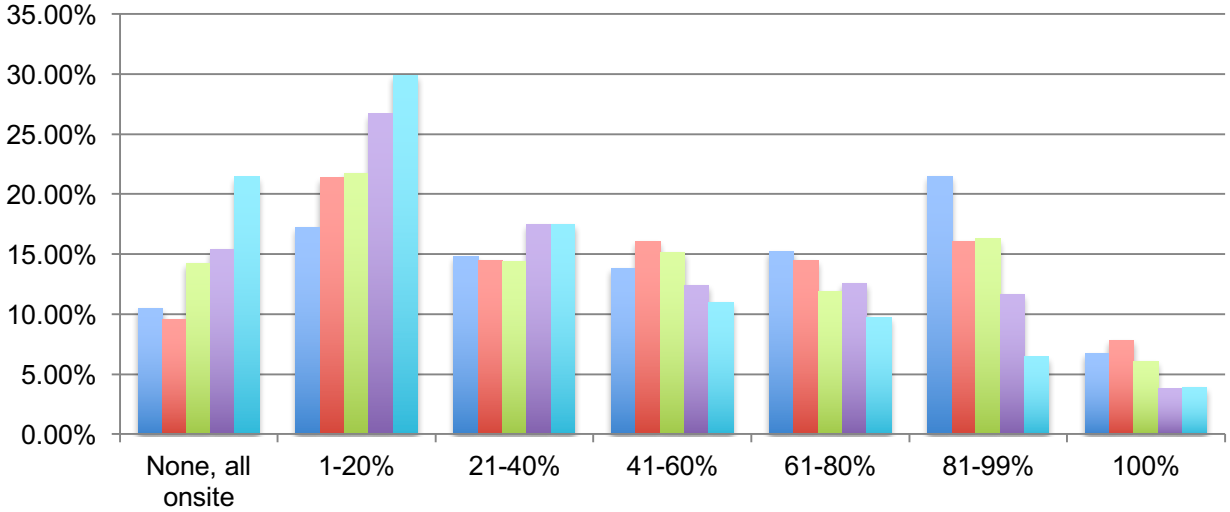
How many years until you plan to retire?

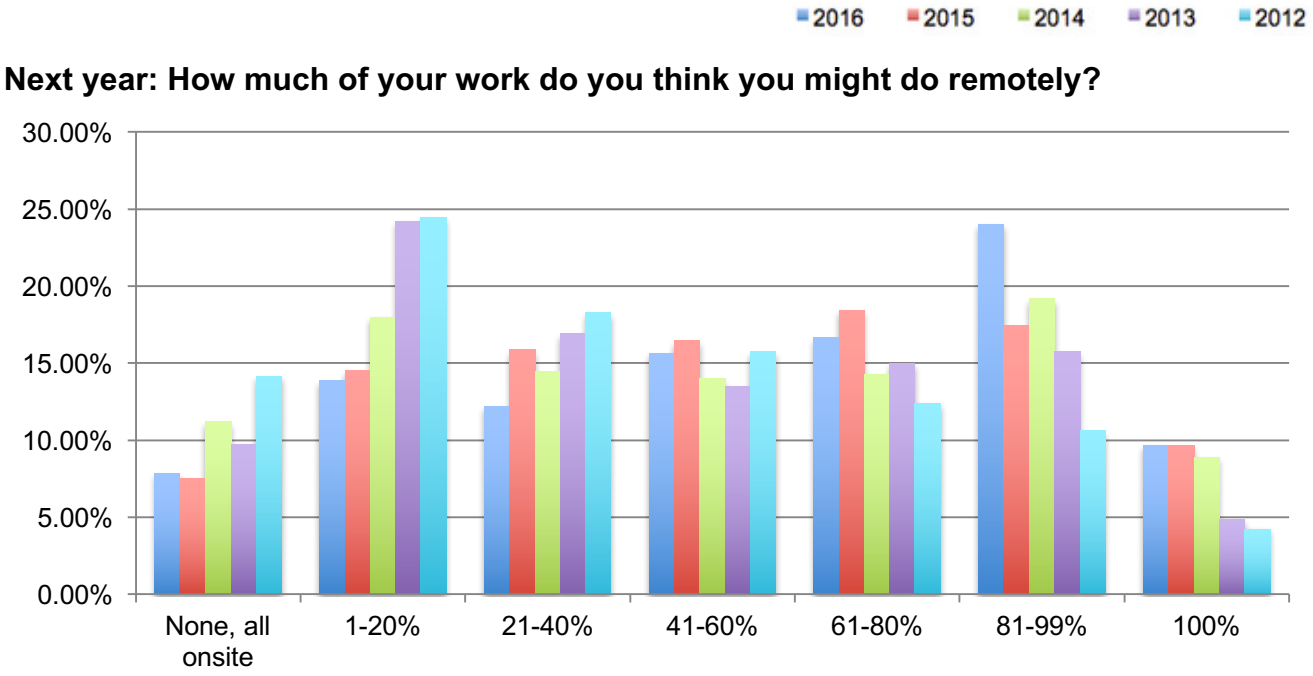


The internet will open up a greater for you to work remotely (not in the office)

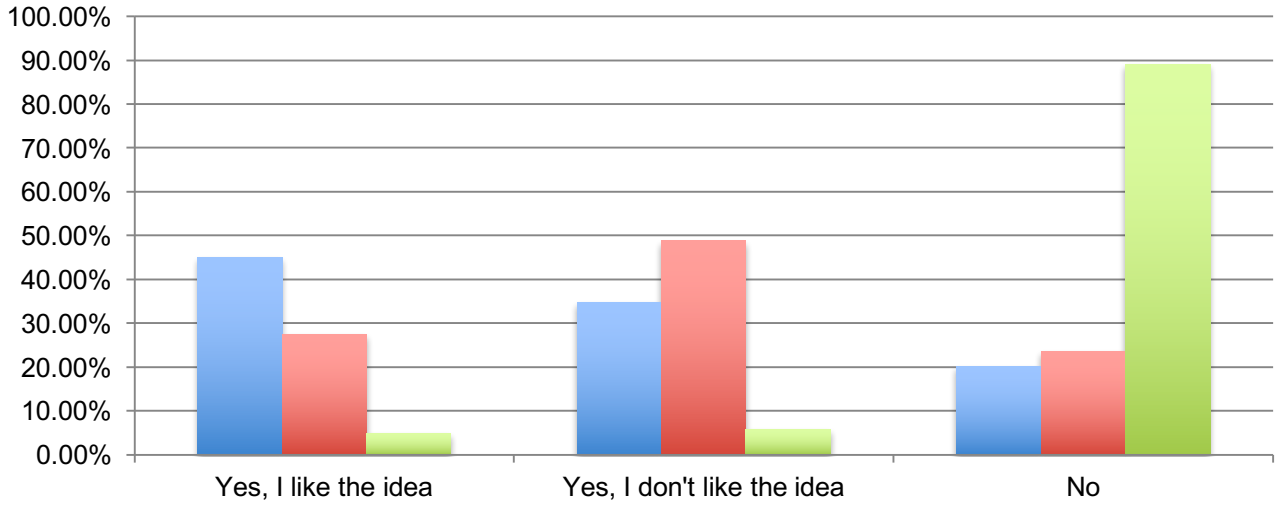


This year: How much of your work do you do remotely?





Next year: How much of your work do you think you might do remotely?

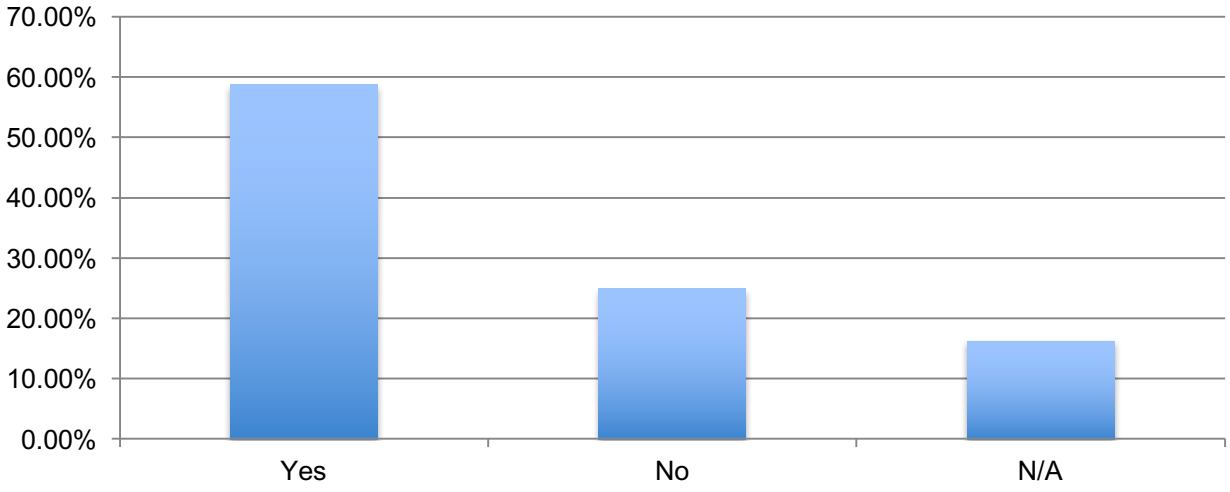


Have you heard about "Single Touch Payroll" from the ATO?

In 2015 & 2014, this question was only asked in the Bookkeepers in Business surveys. In 2016, it has been asked in both.

Bookkeepers in Business Only

If STP is a better system, and helps catch the crooks, will you voluntarily enter STP in 2017?



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Published January 2017

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The material contained within this manual is designed to provide information for bookkeepers and business.

We note that different circumstances might apply from Bookkeeper to Bookkeeper and situation to situation.

Before you rely on this information for any important matters you should make your own enquiries and validation to ascertain if it is appropriate and correct to your circumstances.

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