



# INDUSTRY RECAP

March 2019





# KEY BUSINESS CONDITIONS



NSW Total 795 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-21.8	20.6%	37.1%	42.4%	-3.1	↓	22.5%	38.2%	39.3%	-16.8
Total Capital Spending	-13.9	21.1%	43.9%	35.0%	1.3	↓	18.1%	45.6%	36.2%	-18.1
Total Operating Costs	32.3	43.6%	45.0%	11.4%	35.7	↓	34.9%	51.7%	13.4%	21.6
Total Sales Revenue	-15.7	25.2%	34.0%	40.9%	0.0	↓	26.6%	41.1%	32.3%	-5.8
Total Profit	-30.2	20.1%	29.6%	50.3%	-16.1	↓	23.3%	35.3%	41.4%	-18.1
Total Staff Numbers	-6.8	13.7%	65.8%	20.5%	7.0	↓	11.7%	69.3%	19.0%	-7.3



## Industry Categories

Primary 40 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-34.3	11.4%	42.9%	45.7%	9.4	↓	22.9%	28.6%	48.6%	-25.7
Total Capital Spending	-30.3	18.2%	33.3%	48.5%	0.0	↓	16.1%	35.5%	48.4%	-32.3
Total Operating Costs	24.2	30.3%	63.6%	6.1%	13.8	↑	36.7%	40.0%	23.3%	13.3
Total Sales Revenue	-21.9	28.1%	21.9%	50.0%	-3.6	↓	22.6%	35.5%	41.9%	-19.4
Total Profit	-37.5	15.6%	31.3%	53.1%	-3.6	↓	19.4%	16.1%	64.5%	-45.2
Total Staff Numbers	-12.5	15.6%	56.3%	28.1%	13.8	↓	11.1%	63.0%	25.9%	-14.8

Population Serving 347 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-37.0	16.9%	29.2%	53.9%	-10.9	↓	20.4%	35.1%	44.5%	-24.1
Total Capital Spending	-18.2	20.5%	40.8%	38.7%	3.3	↓	14.5%	43.6%	41.8%	-27.3
Total Operating Costs	27.6	41.5%	44.6%	13.9%	41.7	↓	35.1%	50.0%	14.9%	20.1
Total Sales Revenue	-30.9	17.2%	34.7%	48.1%	-1.6	↓	21.6%	39.4%	39.0%	-17.4
Total Profit	-42.3	15.4%	27.0%	57.7%	-18.7	↓	21.1%	32.0%	46.8%	-25.7
Total Staff Numbers	-18.2	6.3%	69.1%	24.6%	0.4	↓	7.8%	71.6%	20.6%	-12.8

Knowledge Intensive 199 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-2.9	26.4%	44.3%	29.3%	-8.1	↑	27.2%	41.0%	31.8%	-4.6
Total Capital Spending	-10.4	18.2%	53.2%	28.6%	-11.2	↑	20.5%	47.7%	31.8%	-11.3
Total Operating Costs	30.2	40.9%	48.4%	10.7%	19.6	↑	32.7%	56.4%	10.9%	21.8
Total Sales Revenue	5.0	35.2%	34.6%	30.2%	-3.2	↑	33.1%	40.9%	26.0%	7.1
Total Profit	-13.5	26.5%	33.5%	40.0%	-17.1	↑	26.1%	41.2%	32.7%	-6.5
Total Staff Numbers	5.7	20.4%	65.0%	14.6%	7.9	↓	14.8%	69.8%	15.4%	-0.7





# KEY BUSINESS CONDITIONS



Industrial 126 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-23.2	18.8%	39.3%	42.0%	13.0	↓	21.4%	36.6%	42.0%	-20.5
Total Capital Spending	-11.8	23.5%	41.2%	35.3%	10.8	↓	19.6%	48.5%	32.0%	-12.4
Total Operating Costs	40.6	49.1%	42.5%	8.5%	51.8	↓	31.4%	55.9%	12.7%	18.6
Total Sales Revenue	-21.5	25.2%	28.0%	46.7%	9.6	↓	27.2%	41.7%	31.1%	-3.9
Total Profit	-30.8	21.5%	26.2%	52.3%	-6.2	↓	23.1%	34.6%	42.3%	-19.2
Total Staff Numbers	-3.7	16.8%	62.6%	20.6%	15.8	↓	10.7%	69.9%	19.4%	-8.7

Health and Education 83 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	6.7	29.3%	48.0%	22.7%	8.9	↓	22.7%	50.7%	26.7%	-4.0
Total Capital Spending	1.5	27.9%	45.6%	26.5%	14.3	↓	26.5%	50.0%	23.5%	2.9
Total Operating Costs	48.5	57.4%	33.8%	8.8%	40.9	↑	44.1%	47.1%	8.8%	35.3
Total Sales Revenue	13.4	34.3%	44.8%	20.9%	0.0	↑	33.8%	50.0%	16.2%	17.6
Total Profit	-10.8	26.2%	36.9%	36.9%	-25.8	↑	27.9%	45.6%	26.5%	1.5
Total Staff Numbers	10.3	23.5%	63.2%	13.2%	10.6	↓	23.1%	60.0%	16.9%	6.2

## Industries

Accommodation & Food Services 71 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-31.8	18.2%	31.8%	50.0%	-17.0	↓	18.2%	28.8%	53.0%	-34.8
Total Capital Spending	-22.6	21.0%	35.5%	43.5%	22.9	↓	16.7%	41.7%	41.7%	-25.0
Total Operating Costs	36.1	50.8%	34.4%	14.8%	64.6	↓	45.9%	36.1%	18.0%	27.9
Total Sales Revenue	-37.1	16.1%	30.6%	53.2%	8.3	↓	15.0%	41.7%	43.3%	-28.3
Total Profit	-57.4	14.8%	13.1%	72.1%	-27.1	↓	15.3%	27.1%	57.6%	-42.4
Total Staff Numbers	-21.7	5.0%	68.3%	26.7%	6.3	↓	5.2%	65.5%	29.3%	-24.1

Construction 33 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-22.6	19.4%	38.7%	41.9%	5.6	↓	16.1%	41.9%	41.9%	-25.8
Total Capital Spending	-11.5	23.1%	42.3%	34.6%	0.0	↓	15.4%	38.5%	46.2%	-30.8
Total Operating Costs	15.4	26.9%	61.5%	11.5%	44.8	↓	15.4%	61.5%	23.1%	-7.7
Total Sales Revenue	-20.0	20.0%	40.0%	40.0%	6.9	↓	34.6%	23.1%	42.3%	-7.7
Total Profit	-19.2	19.2%	42.3%	38.5%	-6.9	↓	34.6%	38.5%	26.9%	7.7
Total Staff Numbers	-12.5	8.3%	70.8%	20.8%	10.0	↓	8.0%	72.0%	20.0%	-12.0



# KEY BUSINESS CONDITIONS



Financial & Insurance Services 39 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-11.8	23.5%	41.2%	35.3%	-8.6	↓	17.6%	32.4%	50.0%	-32.4
Total Capital Spending	-9.7	16.1%	58.1%	25.8%	-25.0	↑	15.6%	53.1%	31.3%	-15.6
Total Operating Costs	21.2	42.4%	36.4%	21.2%	28.1	↓	36.4%	42.4%	21.2%	15.2
Total Sales Revenue	-9.1	24.2%	42.4%	33.3%	15.6	↓	30.3%	36.4%	33.3%	-3.0
Total Profit	-30.3	15.2%	39.4%	45.5%	-21.9	↓	21.2%	39.4%	39.4%	-18.2
Total Staff Numbers	18.2	30.3%	57.6%	12.1%	6.3	↑	15.6%	53.1%	31.3%	-15.6

Manufacturing 78 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-8.8	25.0%	41.2%	33.8%	14.6	↓	23.5%	39.7%	36.8%	-13.2
Total Capital Spending	-6.7	26.7%	40.0%	33.3%	16.4	↓	24.1%	50.0%	25.9%	-1.7
Total Operating Costs	43.8	50.0%	43.8%	6.3%	51.3	↓	26.2%	59.0%	14.8%	11.5
Total Sales Revenue	-17.2	25.0%	32.8%	42.2%	15.8	↓	29.5%	42.6%	27.9%	1.6
Total Profit	-31.3	23.4%	21.9%	54.7%	2.7	↓	24.2%	38.7%	37.1%	-12.9
Total Staff Numbers	-6.3	17.2%	59.4%	23.4%	18.4	↓	14.8%	67.2%	18.0%	-3.3

Business Services 155 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	0.0	27.2%	45.6%	27.2%	-8.3	↑	29.4%	44.1%	26.5%	2.9
Total Capital Spending	-10.9	19.3%	50.4%	30.3%	-8.7	↓	20.7%	47.4%	31.9%	-11.2
Total Operating Costs	32.0	39.3%	53.3%	7.4%	18.4	↑	30.3%	62.2%	7.6%	22.7
Total Sales Revenue	9.0	38.5%	32.0%	29.5%	-7.2	↑	33.3%	41.9%	24.8%	8.5
Total Profit	-10.1	28.6%	32.8%	38.7%	-16.6	↑	26.7%	42.2%	31.0%	-4.3
Total Staff Numbers	1.7	17.5%	66.7%	15.8%	9.2	↓	14.2%	75.2%	10.6%	3.5

Retail & Wholesale Trade 83 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-51.6	11.9%	24.6%	63.5%	-18.8	↓	13.5%	36.5%	50.0%	-36.5
Total Capital Spending	-27.1	17.8%	37.3%	44.9%	-9.8	↓	11.5%	41.6%	46.9%	-35.4
Total Operating Costs	29.2	44.2%	40.8%	15.0%	44.2	↓	32.2%	55.9%	11.9%	20.3
Total Sales Revenue	-44.2	14.2%	27.5%	58.3%	-11.5	↓	19.0%	37.9%	43.1%	-24.1
Total Profit	-46.3	13.2%	27.3%	59.5%	-24.0	↓	16.5%	30.4%	53.0%	-36.5
Total Staff Numbers	-27.4	6.0%	60.7%	33.3%	-1.0	↓	4.3%	69.6%	26.1%	-21.7



# KEY BUSINESS CONDITIONS & SKILLS



Other Industries 286 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-20.9	20.5%	38.2%	41.3%	4.5	↓	25.7%	37.9%	36.4%	-10.7
Total Capital Spending	-9.0	22.7%	45.5%	31.8%	8.0	↓	19.6%	46.4%	33.9%	-14.3
Total Operating Costs	33.3	44.0%	45.3%	10.7%	31.6	↑	40.3%	46.5%	13.3%	27.0
Total Sales Revenue	-8.3	27.0%	37.8%	35.2%	0.0	↓	27.8%	44.3%	27.8%	0.0
Total Profit	-25.9	20.6%	32.9%	46.5%	-16.5	↓	25.8%	34.5%	39.7%	-14.0
Total Staff Numbers	0.0	15.2%	69.7%	15.2%	4.8	↓	14.9%	69.8%	15.3%	-0.5

Do you have suitably skilled staff?	Previous December 2018		Current March 2019	
Industry	Yes	No	Yes	No
<b>Primary</b>	<b>80.0%</b>	<b>20.0%</b>	<b>57.7%</b>	<b>42.3%</b>
Agriculture, Forestry & Fishing	77.8%	22.2%	52.2%	47.8%
Mining	85.7%	14.3%	100.0%	0.0%
<b>Population Serving Industries</b>	<b>66.1%</b>	<b>33.9%</b>	<b>68.5%</b>	<b>31.5%</b>
Construction	66.7%	33.3%	66.7%	33.3%
Retail Trade	64.3%	35.7%	66.7%	33.3%
Accommodation & Food Services	51.2%	48.8%	70.4%	29.6%
Arts & Recreation Services	66.7%	33.3%	91.7%	8.3%
Other Services	77.3%	22.7%	61.8%	38.2%
<b>Knowledge Intensive</b>	<b>73.9%</b>	<b>26.1%</b>	<b>76.8%</b>	<b>23.2%</b>
Information Media & Telecommunications	61.9%	38.1%	70.6%	29.4%
Financial & Insurance Services	80.8%	19.2%	80.8%	19.2%
Rental, Hiring & real Estate Services	83.3%	16.7%	72.2%	27.8%
Professional, Scientific & Technical Services	71.1%	28.9%	76.6%	23.4%
Administrative & Support Services	91.7%	8.3%	88.9%	11.1%
Public Administration & Safety	25.0%	75.0%	75.0%	25.0%
<b>Industrial</b>	<b>52.0%</b>	<b>48.0%</b>	<b>57.1%</b>	<b>42.9%</b>
Manufacturing	38.2%	38.2%	35.1%	24.7%
Electricity, Gas, Water & Waste	25.0%	75.0%	100.0%	0.0%
Wholesale Trade	72.2%	27.8%	50.0%	50.0%
Transport, Postal & Warehousing	37.5%	62.5%	50.0%	50.0%
<b>Health and Education</b>	<b>76.3%</b>	<b>23.7%</b>	<b>70.3%</b>	<b>29.7%</b>
Education & Training	75.0%	25.0%	73.9%	26.1%
Health Care & Social Assistance	77.1%	22.9%	68.3%	31.7%
<b>All Industries</b>	<b>67.7%</b>	<b>32.3%</b>	<b>68.4%</b>	<b>31.6%</b>



# INVESTMENT & STAFF MOVEMENT



## Initiating Capital Spending – Did your business initiate any major capital spending between January 2019 to March 2019?

Response	ALL INDUSTRIES DEC 18	ALL INDUSTRIES MAR 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
No	61.3%	64.8%	61.3%	66.8%	68.7%	58.6%	59.1%
Yes (total)	38.7%	35.2%	38.7%	33.2%	31.3%	41.4%	40.9%
Yes, to replace aging assets	17.7%	18.2%	12.9%	18.1%	17.7%	20.2%	19.7%
Yes, to improve product range or quality	12.2%	9.5%	9.7%	10.5%	7.5%	12.1%	6.1%
Yes, to increase capacity/meet increased demand	12.2%	10.8%	22.6%	7.6%	8.8%	17.2%	13.6%
Yes, to lower operational costs	7.1%	5.2%	9.7%	3.6%	2.7%	11.1%	6.1%
Yes, other reason	3.4%	3.2%	3.2%	3.2%	2.0%	2.0%	7.6%

## New Staff Hirings - Did your business hire any new staff between January 2019 to March 2019?

Response	ALL INDUSTRIES DEC 18	ALL INDUSTRIES MAR 19	Primary	Population Serving	Knowledge Serving	Industrial	Health and Education
No	49.0%	54.8%	60.0%	62.5%	58.4%	40.4%	33.3%
Yes (total)	51.0%	45.2%	40.0%	37.5%	41.6%	59.6%	66.7%
Yes, to replace staff that left	29.1%	29.8%	20.0%	25.6%	23.5%	42.4%	47.0%
Yes, to obtain new skills	7.9%	7.2%	13.3%	6.5%	6.7%	10.1%	4.5%
Yes, to increase capacity/meet increased demand	22.4%	13.4%	6.7%	8.3%	18.1%	15.2%	24.2%
Yes, other	1.7%	2.4%	6.7%	2.2%	2.7%	2.0%	1.5%

## Staff Departures - Did any staff members leave your business between January 2019 to March 2019?

Response	ALL INDUSTRIES DEC 18	ALL INDUSTRIES MAR 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
No	51.0%	52.3%	50.0%	55.1%	61.7%	39.4%	39.4%
Yes (total)	49.0%	47.7%	50.0%	44.9%	38.3%	60.6%	60.6%
Yes, employee initiated	37.7%	35.8%	33.3%	31.2%	28.2%	48.5%	54.5%
Yes, employer initiated, to reduce costs	5.6%	6.1%	6.7%	7.2%	4.7%	5.1%	6.1%
Yes, employer initiated, due to performance issues	10.2%	12.9%	10.0%	12.3%	10.7%	17.2%	15.2%
Yes, employer initiated, other	3.2%	1.6%	3.3%	2.2%	1.3%	0.0%	1.5%



# COST REDUCTION & BUSINESS PRIORITIES

Cost	ALL INDUSTRIES DEC 18	ALL INDUSTRIES MAR 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
Administration	26.7%	26.8%	25.8%	20.5%	35.7%	21.8%	42.9%
Electricity / Energy	42.5%	48.1%	51.6%	55.7%	32.9%	52.5%	41.3%
Errors / Wastage	37.4%	39.6%	48.4%	40.7%	30.1%	51.5%	33.3%
Freight / Distribution	18.0%	15.4%	25.8%	15.8%	5.6%	30.7%	6.3%
Inefficiency / Unproductive work	57.7%	57.6%	71.0%	49.5%	58.7%	70.3%	63.5%
Labour / Staff	25.6%	33.4%	32.3%	36.6%	28.7%	34.7%	28.6%
Marketing and Advertising	15.2%	16.4%	9.7%	18.3%	14.0%	14.9%	19.0%
Operating costs	38.4%	49.3%	71.0%	49.5%	41.3%	49.5%	55.6%
Overheads	35.1%	38.8%	48.4%	43.2%	32.2%	37.6%	31.7%
Rent	9.8%	10.6%	6.5%	11.4%	10.5%	5.0%	19.0%
Telecommunications (Phone/Internet)	19.3%	23.7%	19.4%	25.3%	21.0%	17.8%	34.9%
Transport (vehicle/fuel)	15.1%	13.4%	16.1%	11.0%	9.8%	20.8%	19.0%
Wages	19.8%	25.4%	29.0%	31.9%	22.4%	17.8%	14.3%

## What are the priorities for your business?

Response	Lowering costs by increasing efficiency	Lowering costs by scaling down operations	Increasing sales through better marketing	Increasing sales through better products	Increasing sales by increasing capacity
Not a priority	7.9%	68.7%	11.1%	21.6%	35.7%
Minor priority	31.3%	19.0%	23.3%	32.6%	33.2%
Major priority	59.1%	10.0%	64.3%	42.6%	27.6%
Not sure	1.7%	2.2%	1.3%	3.2%	3.5%



# TOP CAPABILITIES & TECHNICAL SKILLS



## What capabilities are in demand in your business or industry?

Response	ALL INDUSTRIES DEC 18	ALL INDUSTRIES MAR 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
Communication	38.2%	38.8%	31.0%	43.0%	40.3%	25.3%	41.5%
Team Work	39.1%	39.6%	41.4%	43.3%	24.2%	44.4%	50.8%
Literacy/Numeracy	12.2%	12.6%	6.9%	12.6%	18.8%	8.1%	7.7%
Problem Solving	34.2%	28.4%	13.8%	22.0%	38.3%	44.4%	15.4%
Initiative and Enterprise	24.9%	25.2%	41.4%	26.4%	21.5%	20.2%	29.2%
Planning and Organising	31.5%	30.7%	41.4%	27.4%	28.9%	38.4%	32.3%
Self-Management	30.4%	30.9%	31.0%	32.9%	32.9%	24.2%	27.7%
Learning	8.1%	6.0%	10.3%	5.8%	2.0%	5.1%	15.4%
Technology	23.8%	25.0%	20.7%	19.1%	36.9%	24.2%	26.2%
Leadership	17.0%	15.3%	13.8%	14.1%	14.8%	19.2%	16.9%
Creativity	12.5%	14.5%	3.4%	17.7%	16.1%	8.1%	12.3%

## What technical and/or professional skills are in demand in your business or industry?

Response	ALL INDUSTRIES DEC 18	ALL INDUSTRIES MAR 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
Tertiary Education	20.9%	19.7%	27.6%	9.7%	30.9%	9.1%	49.2%
Industry Knowledge/Relevant Experience	70.9%	66.4%	89.7%	64.6%	63.1%	76.8%	55.4%
Proficiency in a Foreign Language/Specific Language Skills	1.3%	1.1%	0.0%	2.2%	0.0%	1.0%	0.0%
Trade/Vocational Skills	27.1%	24.1%	34.5%	30.0%	4.7%	45.5%	6.2%
Information Technology/Computer Proficiency	26.6%	28.8%	13.8%	25.6%	43.6%	24.2%	21.5%
Finance/Accounting Expertise	13.9%	14.5%	10.3%	10.8%	28.9%	7.1%	10.8%
Marketing/Sales/Media Skills	32.0%	36.8%	37.9%	41.9%	32.9%	39.4%	20.0%
Project/Risk Management	13.1%	9.0%	20.7%	6.9%	10.1%	11.1%	7.7%
Administrative/Clerical Skills	20.1%	17.8%	0.0%	21.3%	14.8%	15.2%	21.5%
Counselling/Care-Giving skills	4.9%	5.3%	0.0%	2.5%	2.0%	0.0%	35.4%
Digital skills	13.9%	15.8%	3.4%	17.0%	23.5%	9.1%	9.2%





Region	Percentage
Capital Region	4.9%
Central Coast	5.8%
Central West	6.4%
Coffs Harbour - Grafton	5.0%
Far West and Orana	2.8%
Hunter Valley exc Newcastle	3.5%
Illawarra	4.6%
Mid North Coast	7.0%
Murray	5.4%
New England and North West	7.5%
Newcastle and Lake Macquarie	6.4%
Richmond - Tweed	9.2%
Riverina	4.6%
Southern Highlands and Shoalhaven	2.6%
Sydney	24.4%

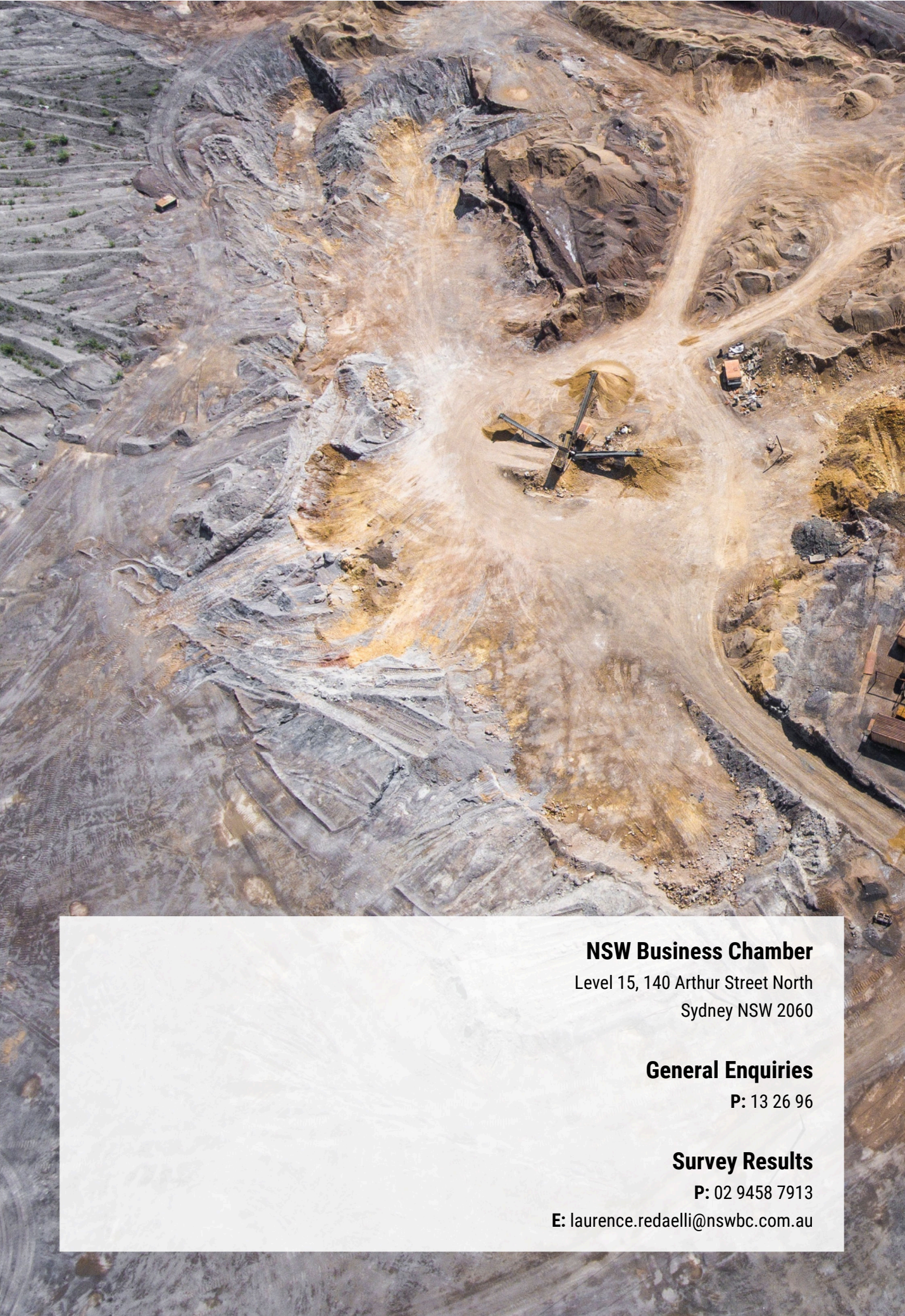
Industry	Percentage
Primary	5.0%
Population Serving	43.6%
Knowledge Intensive	25.0%
Industrial	15.8%
Health and Education	10.4%

Number of Employees	Percentage
More than 200	7.4%
21 to 200	24.7%
5 to 20	34.4%
1 to 4	23.9%
Non-employing / Sole Operator	9.6%

## SURVEY NOTES

- Index figures given in this document are a calculation of the percentage of respondents who answered higher or increased conditions, minus the percentage of respondents who answered lower or decreased conditions. Index scores are either positive or negative.
- Smaller sample sizes mean that results for individual industries, regions and other categories should be treated with caution.
- Primary includes agriculture, forestry & fishing and mining.
- Population Serving includes construction; retail trade; accommodation & food services; arts & recreation services; other services and ownership of dwellings.
- Knowledge Intensive includes information media & telecommunications; financial & insurance services; rental, hiring & real estate services; professional, scientific & technical services; administrative & support services and public administration & safety.
- Industrial includes manufacturing; electricity, gas, water & waste; wholesale trade and transport, postal & warehousing.
- Health and Education includes education & training and healthcare & social assistance.
- Business Services includes information media and telecommunications; rental hiring and real estate services; professional, scientific and technical services; and administration and support services.
- Other Industries includes agriculture, forestry and fishing; arts and recreation services; education and training; electricity, gas, water and waste services; healthcare and social assistance; mining; other services; public administration and safety; transport, postal and warehousing; and unspecified industries.
- Figures presented may not align with the total percentage as respondents were able to select multiple options for certain questions.





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## **Survey Results**

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