

# REGIONAL 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

Capital Region 38 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	0.0	26.5%	47.1%	26.5%	-6.1	↑	38.2%	35.3%	26.5%	11.8
Total Capital Spending	-20.0	13.3%	53.3%	33.3%	9.7	↓	28.6%	46.4%	25.0%	3.6
Total Operating Costs	51.6	58.1%	35.5%	6.5%	29.0	↑	40.0%	53.3%	6.7%	33.3
Total Sales Revenue	3.2	32.3%	38.7%	29.0%	-9.7	↑	27.6%	44.8%	27.6%	0.0
Total Profit	-16.7	20.0%	43.3%	36.7%	-19.4	↑	24.1%	34.5%	41.4%	-17.2
Total Staff Numbers	-10.3	10.3%	69.0%	20.7%	-6.5	↓	17.2%	65.5%	17.2%	0.0

Central Coast 45 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	0.0	28.2%	43.6%	28.2%	22.0	↓	25.6%	46.2%	28.2%	-2.6
Total Capital Spending	9.1	36.4%	36.4%	27.3%	6.7	↑	18.8%	53.1%	28.1%	-9.4
Total Operating Costs	54.3	65.7%	22.9%	11.4%	34.4	↑	32.4%	52.9%	14.7%	17.6
Total Sales Revenue	14.3	42.9%	28.6%	28.6%	25.8	↓	35.3%	32.4%	32.4%	2.9
Total Profit	-8.8	35.3%	20.6%	44.1%	3.2	↓	32.4%	35.3%	32.4%	0.0
Total Staff Numbers	11.8	23.5%	64.7%	11.8%	0.0	↑	18.2%	54.5%	27.3%	-9.1

Central West 50 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-21.3	23.4%	31.9%	44.7%	2.5	↓	27.7%	42.6%	29.8%	-2.1
Total Capital Spending	-2.4	22.0%	53.7%	24.4%	14.7	↓	18.4%	47.4%	34.2%	-15.8
Total Operating Costs	22.0	36.6%	48.8%	14.6%	34.3	↓	38.5%	46.2%	15.4%	23.1
Total Sales Revenue	-9.8	19.5%	51.2%	29.3%	17.1	↓	25.6%	56.4%	17.9%	7.7
Total Profit	-25.6	20.5%	33.3%	46.2%	11.4	↓	20.5%	53.8%	25.6%	-5.1
Total Staff Numbers	2.5	17.5%	67.5%	15.0%	5.7	↓	15.8%	71.1%	13.2%	2.6





# KEY BUSINESS CONDITIONS



Coffs Harbour – Grafton 39 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-27.8	8.3%	55.6%	36.1%	6.5	↓	8.3%	41.7%	50.0%	-41.7
Total Capital Spending	-12.1	21.2%	45.5%	33.3%	11.1	↓	15.2%	45.5%	39.4%	-24.2
Total Operating Costs	45.7	54.3%	37.1%	8.6%	48.1	↓	47.1%	47.1%	5.9%	41.2
Total Sales Revenue	-22.9	14.3%	48.6%	37.1%	22.2	↓	14.7%	52.9%	32.4%	-17.6
Total Profit	-35.3	11.8%	41.2%	47.1%	-7.4	↓	17.6%	32.4%	50.0%	-32.4
Total Staff Numbers	-17.1	5.7%	71.4%	22.9%	14.8	↓	6.3%	68.8%	25.0%	-18.8

Far West and Orana 22 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-38.1	14.3%	33.3%	52.4%	-27.3	↓	28.6%	19.0%	52.4%	-23.8
Total Capital Spending	-33.3	14.3%	38.1%	47.6%	-11.8	↓	15.8%	36.8%	47.4%	-31.6
Total Operating Costs	35.0	45.0%	45.0%	10.0%	50.0	↓	36.8%	52.6%	10.5%	26.3
Total Sales Revenue	-40.0	15.0%	30.0%	55.0%	-16.7	↓	21.1%	42.1%	36.8%	-15.8
Total Profit	-42.9	14.3%	28.6%	57.1%	-33.3	↓	26.3%	36.8%	36.8%	-10.5
Total Staff Numbers	-23.8	9.5%	57.1%	33.3%	0.0	↓	11.8%	52.9%	35.3%	-23.5

Hunter Valley exc. Newcastle 27 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-33.3	12.5%	41.7%	45.8%	33.3	↓	12.5%	50.0%	37.5%	-25.0
Total Capital Spending	-9.1	31.8%	27.3%	40.9%	14.3	↓	25.0%	30.0%	45.0%	-20.0
Total Operating Costs	63.6	68.2%	27.3%	4.5%	71.4	↓	50.0%	31.8%	18.2%	31.8
Total Sales Revenue	-18.2	27.3%	27.3%	45.5%	28.6	↓	38.1%	33.3%	28.6%	9.5
Total Profit	-50.0	18.2%	13.6%	68.2%	-42.9	↓	23.8%	23.8%	52.4%	-28.6
Total Staff Numbers	9.1	18.2%	72.7%	9.1%	14.3	↓	9.1%	72.7%	18.2%	-9.1

Illawarra 36 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-13.8	24.1%	37.9%	37.9%	-2.5	↓	20.7%	34.5%	44.8%	-24.1
Total Capital Spending	-45.8	12.5%	29.2%	58.3%	20.6	↓	16.7%	33.3%	50.0%	-33.3
Total Operating Costs	7.7	23.1%	61.5%	15.4%	51.4	↓	42.3%	46.2%	11.5%	30.8
Total Sales Revenue	-38.5	19.2%	23.1%	57.7%	20.0	↓	19.2%	38.5%	42.3%	-23.1
Total Profit	-42.3	19.2%	19.2%	61.5%	-5.9	↓	19.2%	26.9%	53.8%	-34.6
Total Staff Numbers	-26.9	3.8%	65.4%	30.8%	20.6	↓	12.0%	72.0%	16.0%	-4.0

Mid North Coast 55 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-11.5	25.0%	38.5%	36.5%	-6.0	↓	25.0%	40.4%	34.6%	-9.6
Total Capital Spending	-12.8	23.4%	40.4%	36.2%	-4.9	↓	16.7%	50.0%	33.3%	-16.7
Total Operating Costs	33.3	39.6%	54.2%	6.3%	34.1	↓	31.3%	60.4%	8.3%	22.9
Total Sales Revenue	-25.5	23.4%	27.7%	48.9%	-7.1	↓	18.8%	54.2%	27.1%	-8.3
Total Profit	-33.3	16.7%	33.3%	50.0%	-16.7	↓	19.1%	36.2%	44.7%	-25.5
Total Staff Numbers	-13.0	8.7%	69.6%	21.7%	14.3	↓	2.2%	78.3%	19.6%	-17.4

Murray 42 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-45.7	11.4%	31.4%	57.1%	-11.1	↓	20.0%	31.4%	48.6%	-28.6
Total Capital Spending	-20.0	17.1%	45.7%	37.1%	-1.9	↓	23.5%	32.4%	44.1%	-20.6
Total Operating Costs	20.0	31.4%	57.1%	11.4%	18.9	↑	26.5%	64.7%	8.8%	17.6
Total Sales Revenue	-38.2	11.8%	38.2%	50.0%	-9.4	↓	12.1%	42.4%	45.5%	-33.3
Total Profit	-28.6	22.9%	25.7%	51.4%	-22.6	↓	23.5%	26.5%	50.0%	-26.5
Total Staff Numbers	-17.6	5.9%	70.6%	23.5%	7.5	↓	2.9%	76.5%	20.6%	-17.6

New England and North West 59 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-47.3	16.4%	20.0%	63.6%	-18.3	↓	14.5%	36.4%	49.1%	-34.5
Total Capital Spending	-23.1	21.2%	34.6%	44.2%	-17.6	↓	15.7%	37.3%	47.1%	-31.4
Total Operating Costs	32.1	41.5%	49.1%	9.4%	37.7	↓	31.4%	54.9%	13.7%	17.6
Total Sales Revenue	-47.1	11.8%	29.4%	58.8%	-28.3	↓	19.2%	26.9%	53.8%	-34.6
Total Profit	-59.6	9.6%	21.2%	69.2%	-47.2	↓	15.4%	26.9%	57.7%	-42.3
Total Staff Numbers	-25.0	3.8%	67.3%	28.8%	-7.8	↓	4.0%	76.0%	20.0%	-16.0

Newcastle and Lake Macquarie 50 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-9.5	26.2%	38.1%	35.7%	22.5	↓	26.2%	38.1%	35.7%	-9.5
Total Capital Spending	9.5	33.3%	42.9%	23.8%	21.9	↓	23.8%	45.2%	31.0%	-7.1
Total Operating Costs	17.1	31.7%	53.7%	14.6%	32.4	↓	26.8%	56.1%	17.1%	9.8
Total Sales Revenue	-2.4	35.7%	26.2%	38.1%	32.4	↓	38.1%	31.0%	31.0%	7.1
Total Profit	0.0	31.0%	38.1%	31.0%	14.7	↓	38.1%	31.0%	31.0%	7.1
Total Staff Numbers	12.8	28.2%	56.4%	15.4%	25.7	↓	20.5%	66.7%	12.8%	7.7



# KEY BUSINESS CONDITIONS



Richmond - Tweed 72 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-18.2	19.7%	42.4%	37.9%	0.0	↓	25.8%	34.8%	39.4%	-13.6
Total Capital Spending	-17.2	15.5%	51.7%	32.8%	3.9	↓	14.3%	55.4%	30.4%	-16.1
Total Operating Costs	30.5	42.4%	45.8%	11.9%	41.5	↓	28.1%	52.6%	19.3%	8.8
Total Sales Revenue	1.7	31.7%	38.3%	30.0%	11.5	↓	21.1%	43.9%	35.1%	-14.0
Total Profit	-18.6	18.6%	44.1%	37.3%	-20.8	↑	15.8%	45.6%	38.6%	-22.8
Total Staff Numbers	-10.2	8.5%	72.9%	18.6%	17.6	↓	10.3%	69.0%	20.7%	-10.3

Riverina 36 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-9.7	19.4%	51.6%	29.0%	-4.4	↓	22.6%	54.8%	22.6%	0.0
Total Capital Spending	-10.7	21.4%	46.4%	32.1%	-2.4	↓	7.7%	53.8%	38.5%	-30.8
Total Operating Costs	35.7	46.4%	42.9%	10.7%	39.0	↓	33.3%	66.7%	0.0%	33.3
Total Sales Revenue	-14.8	22.2%	40.7%	37.0%	-2.4	↓	25.9%	55.6%	18.5%	7.4
Total Profit	-28.6	21.4%	28.6%	50.0%	-9.8	↓	14.8%	63.0%	22.2%	-7.4
Total Staff Numbers	21.4	35.7%	50.0%	14.3%	21.4	↓	18.5%	77.8%	3.7%	14.8

Southern Highlands & Shoalhaven 20 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-27.8	22.2%	27.8%	50.0%	-43.8	↑	11.1%	22.2%	66.7%	-55.6
Total Capital Spending	-23.5	11.8%	52.9%	35.3%	-31.3	↑	18.8%	56.3%	25.0%	-6.3
Total Operating Costs	52.9	58.8%	35.3%	5.9%	31.3	↑	43.8%	43.8%	12.5%	31.3
Total Sales Revenue	-6.3	31.3%	31.3%	37.5%	-26.7	↑	26.7%	33.3%	40.0%	-13.3
Total Profit	-12.5	31.3%	25.0%	43.8%	-33.3	↑	33.3%	26.7%	40.0%	-6.7
Total Staff Numbers	-17.6	11.8%	58.8%	29.4%	-13.3	↓	6.7%	80.0%	13.3%	-6.7

Sydney 191 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-22.3	22.3%	33.1%	44.6%	-5.9	↓	22.9%	37.7%	39.4%	-16.6
Total Capital Spending	-15.4	19.2%	46.2%	34.6%	-1.2	↓	18.4%	46.7%	34.9%	-16.4
Total Operating Costs	25.8	40.9%	44.0%	15.1%	32.9	↓	35.3%	48.1%	16.7%	18.6
Total Sales Revenue	-10.7	28.3%	32.7%	39.0%	-6.0	↓	35.0%	37.6%	27.4%	7.6
Total Profit	-34.6	19.9%	25.6%	54.5%	-16.5	↓	26.6%	32.5%	40.9%	-14.3
Total Staff Numbers	-3.8	15.9%	64.3%	19.7%	1.8	↓	14.6%	65.6%	19.9%	-5.3

Do you have suitably skilled staff?	Previous December 2018		Current March 2019	
	Yes	No	Yes	No
Sydney	72.8%	27.2%	68.1%	31.9%
Central Coast	63.3%	36.7%	80.8%	19.2%
Capital Region	54.8%	45.2%	55.6%	44.4%
Central West	50.0%	50.0%	55.6%	44.4%
Coffs Harbour - Grafton	58.3%	41.7%	80.0%	20.0%
Far West and Orana	53.8%	46.2%	64.7%	35.3%
Hunter Valley exc Newcastle	66.7%	33.3%	66.7%	33.3%
Illawarra	75.0%	25.0%	78.3%	21.7%
Mid North Coast	72.5%	27.5%	76.7%	23.3%
Murray	64.4%	35.6%	65.6%	34.4%
New England and North West	56.3%	43.8%	66.0%	34.0%
Newcastle and Lake Macquarie	84.8%	15.2%	76.9%	23.1%
Richmond - Tweed	65.2%	34.8%	65.3%	34.7%
Riverina	71.1%	28.9%	52.2%	47.8%
Southern Highlands and Shoalhaven	85.7%	14.3%	80.0%	20.0%
Total NSW	67.7%	32.3%	68.4%	31.6%



# INVESTMENT & STAFF MOVEMENT



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

Response	Total NSW DEC18	Total NSW MAR19	Sydney	Central Coast	Capital Region	Central West	Coffs Harbour - Grafton	Far West & Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
No	61.3%	64.8%	68.6%	69.0%	74.1%	59.0%	62.5%	52.6%	52.4%	68.0%	69.6%	69.7%	60.8%	57.5%	68.5%	46.2%	75.0%
Yes (total)	38.7%	35.2%	31.4%	31.0%	25.9%	41.0%	37.5%	47.4%	47.6%	32.0%	30.4%	30.3%	39.2%	42.5%	31.5%	53.8%	25.0%
Yes, to replace aging assets	17.7%	18.2%	14.4%	17.2%	14.8%	20.5%	21.9%	36.8%	19.0%	24.0%	15.2%	24.2%	15.7%	22.5%	14.8%	30.8%	6.3%
Yes, to improve product range or quality	12.2%	9.5%	12.4%	6.9%	7.4%	10.3%	6.3%	0.0%	19.0%	4.0%	6.5%	3.0%	15.7%	10.0%	7.4%	11.5%	0.0%
Yes, to increase capacity/meet increased demand	12.2%	10.8%	8.5%	17.2%	7.4%	12.8%	12.5%	5.3%	14.3%	8.0%	8.7%	6.1%	9.8%	20.0%	16.7%	7.7%	6.3%
Yes, to lower operational costs	7.1%	5.2%	4.6%	3.4%	7.4%	0.0%	6.3%	5.3%	4.8%	8.0%	6.5%	3.0%	3.9%	5.0%	7.4%	11.5%	0.0%
Yes, other reason	3.4%	3.2%	5.9%	0.0%	0.0%	0.0%	3.1%	5.3%	0.0%	4.0%	2.2%	3.0%	0.0%	5.0%	3.7%	0.0%	12.5%

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

Response	Total NSW DEC18	Total NSW MAR19	Sydney	Central Coast	Capital Region	Central West	Coffs Harbour - Grafton	Far West & Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
No	49.0%	54.8%	57.5%	42.4%	55.6%	63.2%	53.3%	63.2%	61.9%	52.0%	69.6%	65.7%	50.0%	47.5%	46.3%	20.0%	75.0%
Yes (total)	51.0%	45.2%	42.5%	57.6%	44.4%	36.8%	46.7%	36.8%	38.1%	48.0%	30.4%	34.3%	50.0%	52.5%	53.7%	80.0%	25.0%
Yes, to replace staff that left	29.1%	29.8%	28.1%	33.3%	33.3%	21.1%	40.0%	21.1%	19.0%	40.0%	19.6%	17.1%	42.0%	32.5%	31.5%	44.0%	18.8%
Yes, to obtain new skills	7.9%	7.2%	9.2%	6.1%	3.7%	5.3%	3.3%	5.3%	9.5%	8.0%	4.3%	8.6%	2.0%	7.5%	11.1%	12.0%	6.3%
Yes, to increase capacity/meet increased demand	22.4%	13.4%	9.8%	21.2%	11.1%	13.2%	6.7%	10.5%	23.8%	12.0%	4.3%	8.6%	14.0%	25.0%	16.7%	36.0%	0.0%
Yes, other	1.7%	2.4%	2.0%	6.1%	0.0%	2.6%	3.3%	0.0%	0.0%	4.0%	2.2%	0.0%	2.0%	2.5%	5.6%	0.0%	0.0%



# STAFF MOVEMENT & BUSINESS PRIORITIES

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

Response	Total NSW DEC18	Total NSW MAR19	Sydney	Central Coast	Capital Region	Central West	Coffs Harbour - Grafton	Far West & Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
No	51.0%	52.3%	50.7%	60.6%	59.3%	65.8%	40.0%	47.4%	61.9%	40.0%	56.5%	57.1%	50.0%	55.0%	50.0%	40.0%	56.3%
Yes (total)	49.0%	47.7%	49.3%	39.4%	40.7%	34.2%	60.0%	52.6%	38.1%	60.0%	43.5%	42.9%	50.0%	45.0%	50.0%	60.0%	43.8%
Yes, employee initiated	37.7%	35.8%	34.9%	39.4%	33.3%	26.3%	50.0%	42.1%	33.3%	36.0%	30.4%	31.4%	34.0%	40.0%	31.5%	52.0%	31.3%
Yes, employer initiated, to reduce costs	5.6%	6.1%	7.9%	0.0%	0.0%	2.6%	3.3%	5.3%	4.8%	20.0%	2.2%	5.7%	10.0%	5.0%	7.4%	0.0%	6.3%
Yes, employer initiated, due to performance issues	10.2%	12.9%	13.2%	6.1%	14.8%	10.5%	30.0%	5.3%	4.8%	24.0%	15.2%	5.7%	8.0%	17.5%	18.5%	8.0%	0.0%
Yes, employer initiated, other	3.2%	1.6%	3.3%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%	2.2%	2.9%	2.0%	0.0%	0.0%	0.0%	6.3%

## 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%



# COST REDUCTION PRIORITIES



Cost	ALL REGIONS DEC 18	ALL REGIONS MAR 19	Sydney	Central Coast	Capital Region	Central West	Coffs Harbour - Grafton	Far West & Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
Administration	26.7%	26.8%	28.4%	44.1%	18.5%	20.5%	35.5%	10.5%	30.0%	30.8%	21.7%	35.3%	12.2%	33.3%	23.1%	23.1%	40.0%
Electricity / Energy	42.5%	48.1%	39.9%	47.1%	66.7%	64.1%	61.3%	57.9%	65.0%	53.8%	43.5%	47.1%	51.0%	36.1%	50.0%	38.5%	40.0%
Errors / Wastage	37.4%	39.6%	33.1%	32.4%	37.0%	41.0%	48.4%	63.2%	35.0%	50.0%	39.1%	23.5%	38.8%	38.9%	48.1%	53.8%	53.3%
Freight / Distribution	18.0%	15.4%	16.9%	11.8%	14.8%	17.9%	16.1%	31.6%	0.0%	15.4%	10.9%	11.8%	20.4%	19.4%	15.4%	7.7%	6.7%
Inefficiency / Unproductive work	57.7%	57.6%	55.4%	52.9%	66.7%	53.8%	61.3%	68.4%	40.0%	61.5%	54.3%	50.0%	51.0%	58.3%	67.3%	80.8%	60.0%
Labour / Staff	25.6%	33.4%	37.2%	26.5%	29.6%	35.9%	29.0%	47.4%	30.0%	42.3%	41.3%	23.5%	26.5%	30.6%	36.5%	15.4%	26.7%
Marketing and Advertising	15.2%	16.4%	12.2%	5.9%	22.2%	15.4%	12.9%	31.6%	15.0%	23.1%	17.4%	32.4%	14.3%	11.1%	13.5%	23.1%	33.3%
Operating costs	38.4%	49.3%	47.3%	52.9%	48.1%	53.8%	54.8%	47.4%	55.0%	53.8%	45.7%	50.0%	46.9%	50.0%	44.2%	42.3%	66.7%
Overheads	35.1%	38.8%	37.2%	41.2%	55.6%	38.5%	48.4%	31.6%	45.0%	42.3%	30.4%	32.4%	32.7%	47.2%	42.3%	42.3%	26.7%
Rent	9.8%	10.6%	14.9%	11.8%	11.1%	2.6%	19.4%	15.8%	5.0%	3.8%	10.9%	8.8%	4.1%	19.4%	5.8%	3.8%	20.0%
Telecommunications (Phone/Internet)	19.3%	23.7%	20.9%	23.5%	40.7%	20.5%	29.0%	21.1%	30.0%	26.9%	30.4%	17.6%	14.3%	19.4%	21.2%	34.6%	40.0%
Transport (vehicle/fuel)	15.1%	13.4%	15.5%	11.8%	11.1%	12.8%	9.7%	26.3%	20.0%	15.4%	10.9%	8.8%	20.4%	13.9%	5.8%	11.5%	0.0%
Wages	19.8%	25.4%	25.0%	17.6%	22.2%	23.1%	35.5%	15.8%	30.0%	38.5%	26.1%	26.5%	24.5%	22.2%	23.1%	19.2%	33.3%



# TOP CAPABILITIES & TECHNICAL SKILLS

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

Response	All Regions DEC 18	All Regions MAR 19	Sydney	Central Coast	Capital Region	Central West	Coffs Harbour - Grafton	Far West & Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
Communication	38.2%	38.8%	40.5%	24.2%	40.7%	23.7%	43.3%	52.6%	23.8%	36.0%	44.4%	35.3%	42.0%	40.0%	42.6%	52.0%	43.8%
Team Work	39.1%	39.6%	37.3%	45.5%	44.4%	36.8%	56.7%	52.6%	42.9%	40.0%	35.6%	41.2%	40.0%	30.0%	40.7%	32.0%	37.5%
Literacy/Numeracy	12.2%	12.6%	10.5%	18.2%	11.1%	7.9%	0.0%	26.3%	19.0%	4.0%	17.8%	8.8%	22.0%	10.0%	16.7%	8.0%	12.5%
Problem Solving	34.2%	28.4%	24.8%	27.3%	25.9%	28.9%	16.7%	26.3%	28.6%	48.0%	33.3%	26.5%	22.0%	42.5%	27.8%	32.0%	37.5%
Initiative and Enterprise	24.9%	25.2%	27.5%	30.3%	22.2%	31.6%	40.0%	10.5%	38.1%	24.0%	24.4%	20.6%	22.0%	20.0%	20.4%	12.0%	18.8%
Planning and Organising	31.5%	30.7%	30.7%	36.4%	44.4%	39.5%	20.0%	21.1%	14.3%	36.0%	37.8%	23.5%	28.0%	35.0%	27.8%	32.0%	25.0%
Self-Management	30.4%	30.9%	26.1%	24.2%	29.6%	47.4%	26.7%	21.1%	38.1%	24.0%	37.8%	23.5%	38.0%	20.0%	38.9%	36.0%	31.3%
Learning	8.1%	6.0%	5.9%	3.0%	3.7%	10.5%	6.7%	21.1%	9.5%	4.0%	4.4%	8.8%	8.0%	5.0%	1.9%	4.0%	0.0%
Technology	23.8%	25.0%	30.7%	27.3%	25.9%	28.9%	23.3%	21.1%	28.6%	12.0%	20.0%	20.6%	16.0%	25.0%	25.9%	20.0%	25.0%
Leadership	17.0%	15.3%	11.1%	18.2%	18.5%	18.4%	16.7%	15.8%	14.3%	20.0%	6.7%	20.6%	24.0%	25.0%	11.1%	16.0%	0.0%
Creativity	12.5%	14.5%	13.7%	15.2%	14.8%	13.2%	20.0%	10.5%	28.6%	16.0%	8.9%	17.6%	12.0%	15.0%	13.0%	16.0%	12.5%

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

Response	All Regions DEC 18	All Regions MAR 19	Sydney	Central Coast	Capital Region	Central West	Coffs Harbour - Grafton	Far West & Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
Tertiary Education	20.9%	19.7%	15.7%	9.1%	7.4%	26.3%	26.7%	21.1%	23.8%	16.0%	13.3%	26.5%	24.0%	25.0%	25.9%	20.0%	31.3%
Industry Knowledge/Relevant Experience	70.9%	66.4%	65.4%	60.6%	66.7%	76.3%	70.0%	68.4%	52.4%	72.0%	71.1%	79.4%	54.0%	72.5%	61.1%	80.0%	62.5%
Proficiency in a Foreign Language/Specific Language Skills	1.3%	1.1%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%
Trade/Vocational Skills	27.1%	24.1%	22.9%	18.2%	25.9%	21.1%	26.7%	31.6%	4.8%	32.0%	26.7%	23.5%	32.0%	10.0%	24.1%	48.0%	25.0%
Information Technology/Computer Proficiency	26.6%	28.8%	36.6%	30.3%	25.9%	18.4%	23.3%	36.8%	38.1%	12.0%	22.2%	26.5%	22.0%	37.5%	25.9%	24.0%	25.0%
Finance/Accounting Expertise	13.9%	14.5%	12.4%	15.2%	7.4%	18.4%	20.0%	15.8%	9.5%	16.0%	17.8%	23.5%	16.0%	22.5%	14.8%	0.0%	0.0%
Marketing/Sales/Media Skills	32.0%	36.8%	37.3%	27.3%	37.0%	34.2%	26.7%	26.3%	71.4%	28.0%	37.8%	32.4%	42.0%	45.0%	42.6%	24.0%	31.3%
Project/Risk Management	13.1%	9.0%	10.5%	6.1%	14.8%	5.3%	0.0%	0.0%	4.8%	16.0%	8.9%	8.8%	8.0%	15.0%	1.9%	16.0%	18.8%
Administrative/Clerical Skills	20.1%	17.8%	14.4%	18.2%	37.0%	18.4%	13.3%	21.1%	4.8%	8.0%	31.1%	14.7%	24.0%	10.0%	18.5%	20.0%	18.8%
Counselling/Care-Giving skills	4.9%	5.3%	3.3%	9.1%	7.4%	7.9%	13.3%	5.3%	4.8%	4.0%	4.4%	2.9%	4.0%	5.0%	5.6%	8.0%	0.0%
Digital skills	13.9%	15.8%	18.3%	21.2%	3.7%	18.4%	23.3%	10.5%	23.8%	12.0%	13.3%	8.8%	16.0%	12.5%	14.8%	12.0%	18.8%



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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