

# REGIONAL RECAP

September 2019



NSW Total 868 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-23.9	17.4%	41.2%	41.4%	-27.7	↑	29.1%	39.1%	31.8%	-2.8
Total Capital Spending	-15.0	22.4%	40.3%	37.3%	-15.1	↑	20.7%	45.9%	33.4%	-12.8
Total Operating Costs	31.2	41.6%	48.0%	10.4%	27.3	↑	36.2%	55.0%	8.8%	27.4
Total Sales Revenue	-13.8	25.9%	34.5%	39.7%	-18.5	↑	33.4%	37.6%	29.1%	4.3
Total Profit	-29.4	19.1%	32.4%	48.5%	-31.1	↑	26.7%	36.9%	36.4%	-9.7
Total Staff Numbers	-5.2	13.0%	68.9%	18.1%	-6.6	↑	13.9%	72.4%	13.6%	0.3

Capital Region 29 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-60.7	3.6%	32.1%	64.3%	-40.0	↓	25.0%	32.1%	42.9%	-17.9
Total Capital Spending	-41.7	12.5%	33.3%	54.2%	-29.2	↓	25.0%	37.5%	37.5%	-12.5
Total Operating Costs	50.0	58.3%	33.3%	8.3%	29.2	↑	54.2%	29.2%	16.7%	37.5
Total Sales Revenue	-66.7	8.3%	16.7%	75.0%	-39.1	↓	26.1%	13.0%	60.9%	-34.8
Total Profit	-70.8	8.3%	12.5%	79.2%	-47.8	↓	25.0%	12.5%	62.5%	-37.5
Total Staff Numbers	-20.8	4.2%	70.8%	25.0%	-16.0	↓	0.0%	82.6%	17.4%	-17.4

Central Coast 44 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-17.1	19.5%	43.9%	36.6%	-24.4	↑	26.8%	41.5%	31.7%	-17.1
Total Capital Spending	-5.7	25.7%	42.9%	31.4%	0.0	↓	18.2%	54.5%	27.3%	-5.7
Total Operating Costs	27.8	41.7%	44.4%	13.9%	41.9	↓	39.4%	57.6%	3.0%	27.8
Total Sales Revenue	2.9	37.1%	28.6%	34.3%	-4.7	↑	51.5%	30.3%	18.2%	2.9
Total Profit	-11.4	28.6%	31.4%	40.0%	-20.9	↑	50.0%	21.9%	28.1%	-11.4
Total Staff Numbers	5.7	14.3%	77.1%	8.6%	-9.3	↑	17.6%	73.5%	8.8%	5.7

Central West 37 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-33.3	12.1%	42.4%	45.5%	-25.5	↓	24.2%	42.4%	33.3%	-9.1
Total Capital Spending	-18.5	18.5%	44.4%	37.0%	0.0	↓	20.0%	32.0%	48.0%	-28.0
Total Operating Costs	46.4	53.6%	39.3%	7.1%	27.3	↑	46.2%	50.0%	3.8%	42.3
Total Sales Revenue	-7.4	25.9%	40.7%	33.3%	-11.4	↑	26.9%	57.7%	15.4%	11.5
Total Profit	-29.6	14.8%	40.7%	44.4%	-18.6	↓	24.0%	48.0%	28.0%	-4.0
Total Staff Numbers	10.7	17.9%	75.0%	7.1%	4.7	↑	7.7%	76.9%	15.4%	-7.7

Coffs Harbour – Grafton 31 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-27.6	20.7%	31.0%	48.3%	-3.1	↓	27.6%	51.7%	20.7%	6.9
Total Capital Spending	-16.7	25.0%	33.3%	41.7%	13.3	↓	25.0%	45.8%	29.2%	-4.2
Total Operating Costs	24.0	40.0%	44.0%	16.0%	46.7	↓	45.8%	45.8%	8.3%	37.5
Total Sales Revenue	-8.3	29.2%	33.3%	37.5%	-3.4	↓	40.9%	31.8%	27.3%	13.6
Total Profit	-16.7	29.2%	25.0%	45.8%	-13.3	↓	31.8%	40.9%	27.3%	4.5
Total Staff Numbers	-11.5	7.7%	73.1%	19.2%	7.1	↓	4.2%	87.5%	8.3%	-4.2

Far West and Orana 26 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-22.7	22.7%	31.8%	45.5%	-46.9	↑	27.3%	27.3%	45.5%	-18.2
Total Capital Spending	-10.5	31.6%	26.3%	42.1%	-44.8	↑	21.1%	15.8%	63.2%	-42.1
Total Operating Costs	26.3	36.8%	52.6%	10.5%	13.8	↑	25.0%	55.0%	20.0%	5.0
Total Sales Revenue	-45.0	10.0%	35.0%	55.0%	-51.7	↑	21.1%	36.8%	42.1%	-21.1
Total Profit	-22.2	22.2%	33.3%	44.4%	-58.6	↑	15.0%	45.0%	40.0%	-25.0
Total Staff Numbers	0.0	30.0%	40.0%	30.0%	-24.1	↑	22.2%	55.6%	22.2%	0.0

Hunter Valley exc. Newcastle 49 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-4.7	25.6%	44.2%	30.2%	-12.0	↑	41.9%	44.2%	14.0%	27.9
Total Capital Spending	-11.8	26.5%	35.3%	38.2%	-16.0	↑	39.4%	39.4%	21.2%	18.2
Total Operating Costs	40.0	42.9%	54.3%	2.9%	24.0	↑	38.2%	61.8%	0.0%	38.2
Total Sales Revenue	-2.9	28.6%	40.0%	31.4%	-20.0	↑	47.1%	35.3%	17.6%	29.4
Total Profit	-22.9	20.0%	37.1%	42.9%	-36.0	↑	44.1%	35.3%	20.6%	23.5
Total Staff Numbers	-2.9	14.7%	67.6%	17.6%	-40.0	↑	21.2%	72.7%	6.1%	15.2

Illawarra 54 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-28.6	16.3%	38.8%	44.9%	-38.5	↑	32.7%	42.9%	24.5%	8.2
Total Capital Spending	-13.2	21.1%	44.7%	34.2%	-20.8	↑	25.0%	38.9%	36.1%	-11.1
Total Operating Costs	13.2	31.6%	50.0%	18.4%	36.0	↓	27.8%	55.6%	16.7%	11.1
Total Sales Revenue	10.5	39.5%	31.6%	28.9%	-14.0	↑	38.9%	38.9%	22.2%	16.7
Total Profit	-5.1	33.3%	28.2%	38.5%	-24.0	↑	29.7%	43.2%	27.0%	2.7
Total Staff Numbers	-2.6	15.8%	65.8%	18.4%	6.5	↓	5.6%	75.0%	19.4%	-13.9



Mid North Coast 39 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-32.4	17.6%	32.4%	50.0%	-5.1	↓	32.4%	32.4%	35.3%	-2.9
Total Capital Spending	0.0	18.5%	63.0%	18.5%	-10.7	↑	22.2%	55.6%	22.2%	0.0
Total Operating Costs	25.0	39.3%	46.4%	14.3%	26.3	↓	32.1%	60.7%	7.1%	25.0
Total Sales Revenue	-32.1	17.9%	32.1%	50.0%	5.4	↓	28.6%	35.7%	35.7%	-7.1
Total Profit	-44.4	11.1%	33.3%	55.6%	-8.9	↓	25.0%	39.3%	35.7%	-10.7
Total Staff Numbers	-10.7	7.1%	75.0%	17.9%	3.6	↓	14.3%	67.9%	17.9%	-3.6

Murray 49 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-25.0	18.8%	37.5%	43.8%	-18.2	↓	27.1%	31.3%	41.7%	-14.6
Total Capital Spending	-31.8	18.2%	31.8%	50.0%	-28.0	↓	18.2%	40.9%	40.9%	-22.7
Total Operating Costs	25.0	34.1%	56.8%	9.1%	31.4	↓	29.5%	63.6%	6.8%	22.7
Total Sales Revenue	-37.2	16.3%	30.2%	53.5%	-23.5	↓	32.6%	41.9%	25.6%	7.0
Total Profit	-50.0	11.4%	27.3%	61.4%	-35.3	↓	20.5%	36.4%	43.2%	-22.7
Total Staff Numbers	-15.9	6.8%	70.5%	22.7%	-13.5	↓	8.9%	77.8%	13.3%	-4.4

New England and North West 55 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-52.9	13.7%	19.6%	66.7%	-35.0	↓	19.6%	25.5%	54.9%	-35.3
Total Capital Spending	-57.8	4.4%	33.3%	62.2%	-17.2	↓	8.9%	40.0%	51.1%	-42.2
Total Operating Costs	18.8	33.3%	52.1%	14.6%	13.8	↑	29.8%	59.6%	10.6%	19.1
Total Sales Revenue	-52.1	8.3%	31.3%	60.4%	-39.7	↓	17.8%	26.7%	55.6%	-37.8
Total Profit	-64.6	6.3%	22.9%	70.8%	-42.9	↓	14.9%	27.7%	57.4%	-42.6
Total Staff Numbers	-22.9	6.3%	64.6%	29.2%	-12.7	↓	8.3%	72.9%	18.8%	-10.4

Newcastle and Lake Macquarie 67 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-8.3	18.3%	55.0%	26.7%	-43.2	↑	31.7%	48.3%	20.0%	11.7
Total Capital Spending	1.9	30.8%	40.4%	28.8%	-36.6	↑	15.7%	60.8%	23.5%	-7.8
Total Operating Costs	35.2	40.7%	53.7%	5.6%	4.9	↑	25.0%	61.5%	13.5%	11.5
Total Sales Revenue	7.4	31.5%	44.4%	24.1%	-19.5	↑	46.2%	30.8%	23.1%	23.1
Total Profit	0.0	31.5%	37.0%	31.5%	-29.3	↑	38.5%	30.8%	30.8%	7.7
Total Staff Numbers	1.8	14.5%	72.7%	12.7%	-17.5	↑	15.4%	73.1%	11.5%	3.8



# KEY BUSINESS CONDITIONS



Richmond - Tweed 51 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-14.9	17.0%	51.1%	31.9%	-32.9	↑	21.3%	44.7%	34.0%	-12.8
Total Capital Spending	5.3	31.6%	42.1%	26.3%	-3.1	↑	27.0%	48.6%	24.3%	2.7
Total Operating Costs	38.5	46.2%	46.2%	7.7%	25.4	↑	52.6%	42.1%	5.3%	47.4
Total Sales Revenue	5.3	36.8%	31.6%	31.6%	-13.4	↑	40.5%	27.0%	32.4%	8.1
Total Profit	-28.9	18.4%	34.2%	47.4%	-31.3	↑	22.2%	41.7%	36.1%	-13.9
Total Staff Numbers	12.8	28.2%	56.4%	15.4%	1.5	↑	24.3%	59.5%	16.2%	8.1

Riverina 40 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-22.9	8.6%	60.0%	31.4%	-15.4	↓	20.0%	37.1%	42.9%	-22.9
Total Capital Spending	-26.7	20.0%	33.3%	46.7%	-5.9	↓	13.8%	34.5%	51.7%	-37.9
Total Operating Costs	26.7	40.0%	46.7%	13.3%	16.2	↑	26.7%	53.3%	20.0%	6.7
Total Sales Revenue	-6.7	26.7%	40.0%	33.3%	2.7	↓	16.7%	50.0%	33.3%	-16.7
Total Profit	-33.3	16.7%	33.3%	50.0%	-21.6	↓	13.3%	43.3%	43.3%	-30.0
Total Staff Numbers	-6.7	10.0%	73.3%	16.7%	-2.8	↓	10.0%	70.0%	20.0%	-10.0

Southern Highlands & Shoalhaven 30 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-48.3	10.3%	31.0%	58.6%	-59.1	↑	44.8%	31.0%	24.1%	20.7
Total Capital Spending	-13.0	26.1%	34.8%	39.1%	-27.3	↑	21.7%	39.1%	39.1%	-17.4
Total Operating Costs	50.0	62.5%	25.0%	12.5%	36.4	↑	47.8%	39.1%	13.0%	34.8
Total Sales Revenue	-29.2	25.0%	20.8%	54.2%	-38.1	↑	26.1%	34.8%	39.1%	-13.0
Total Profit	-56.5	8.7%	26.1%	65.2%	-52.4	↓	17.4%	30.4%	52.2%	-34.8
Total Staff Numbers	-26.1	4.3%	65.2%	30.4%	-28.6	↑	22.7%	63.6%	13.6%	9.1

Sydney 256 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-15.9	20.5%	43.1%	36.4%	-27.0	↑	30.1%	40.2%	29.7%	0.4
Total Capital Spending	-10.4	21.8%	46.1%	32.1%	-17.6	↑	20.4%	52.7%	26.9%	-6.5
Total Operating Costs	31.2	40.6%	50.0%	9.4%	28.9	↑	36.6%	57.2%	6.2%	30.4
Total Sales Revenue	-7.1	28.1%	36.7%	35.2%	-20.3	↑	32.3%	44.4%	23.3%	9.0
Total Profit	-23.6	19.5%	37.4%	43.1%	-35.1	↑	26.2%	41.7%	32.1%	-5.9
Total Staff Numbers	-4.0	12.6%	70.7%	16.7%	-3.7	↓	16.8%	71.6%	11.6%	5.3

Do you have suitably skilled staff?	Previous June 2019		Current September 2019	
Region	Yes	No	Yes	No
Sydney	72.1%	27.9%	43.3%	56.7%
Central Coast	82.4%	17.6%	36.7%	63.3%
Capital Region	47.8%	52.2%	47.6%	52.4%
Central West	73.5%	26.5%	55.6%	44.4%
Coffs Harbour - Grafton	68.0%	32.0%	45.8%	54.2%
Far West and Orana	45.8%	54.2%	60.0%	40.0%
Hunter Valley exc Newcastle	69.6%	30.4%	48.3%	51.7%
Illawarra	87.2%	12.8%	24.2%	75.8%
Mid North Coast	81.3%	18.8%	37.0%	63.0%
Murray	66.7%	33.3%	35.0%	65.0%
New England and North West	68.5%	31.5%	34.8%	65.2%
Newcastle and Lake Macquarie	80.0%	20.0%	28.9%	71.1%
Richmond - Tweed	65.5%	34.5%	61.3%	38.7%
Riverina	56.3%	43.8%	64.3%	35.7%
Southern Highlands and Shoalhaven	73.7%	26.3%	56.5%	43.5%
Total NSW	70.7%	29.3%	43.6%	56.4%



# INVESTMENT & STAFF MOVEMENT

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

Response	Total NSW JUN19	Total NSW SEP19	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%	60.8%	63.0%	71.9%	68.2%	48.1%	69.6%	68.4%	58.6%	69.7%	46.2%	55.8%	68.1%	57.8%	50.0%	50.0%	60.9%
Yes (total)	38.7%	39.2%	37.0%	28.1%	31.8%	51.9%	30.4%	31.6%	41.4%	30.3%	53.8%	44.2%	31.9%	42.2%	50.0%	50.0%	39.1%
Yes, to replace aging assets	21.0%	21.5%	21.5%	9.4%	18.2%	29.6%	21.7%	5.3%	20.7%	24.2%	34.6%	25.6%	19.1%	26.7%	22.2%	23.3%	17.4%
Yes, to improve product range or quality	10.0%	9.6%	9.4%	12.5%	13.6%	11.1%	0.0%	21.1%	13.8%	3.0%	7.7%	4.7%	10.6%	13.3%	8.3%	10.0%	8.7%
Yes, to increase capacity/meet increased demand	9.0%	11.9%	8.8%	9.4%	9.1%	18.5%	13.0%	10.5%	13.8%	6.1%	19.2%	7.0%	6.4%	15.6%	19.4%	26.7%	8.7%
Yes, to lower operational costs	5.8%	5.9%	3.9%	9.4%	0.0%	14.8%	4.3%	0.0%	13.8%	3.0%	0.0%	7.0%	4.3%	6.7%	8.3%	10.0%	13.0%
Yes, other reason	3.4%	3.9%	3.3%	0.0%	9.1%	3.7%	4.3%	5.3%	6.9%	3.0%	0.0%	4.7%	2.1%	4.4%	2.8%	6.7%	4.3%

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

Response	Total NSW JUN19	Total NSW SEP19	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	55.0%	51.3%	46.6%	48.4%	76.2%	51.9%	58.3%	42.9%	51.7%	61.8%	53.6%	52.4%	58.7%	37.0%	40.5%	65.5%	65.2%
Yes (total)	45.0%	48.7%	53.4%	51.6%	23.8%	48.1%	41.7%	57.1%	48.3%	38.2%	46.4%	47.6%	41.3%	63.0%	59.5%	34.5%	34.8%
Yes, to replace staff that left	30.0%	30.9%	35.4%	38.7%	19.0%	22.2%	33.3%	23.8%	31.0%	20.6%	39.3%	33.3%	23.9%	30.4%	35.1%	24.1%	30.4%
Yes, to obtain new skills	5.5%	8.7%	10.6%	12.9%	0.0%	3.7%	12.5%	19.0%	0.0%	2.9%	3.6%	0.0%	0.0%	23.9%	10.8%	3.4%	8.7%
Yes, to increase capacity/meet increased demand	14.3%	19.1%	19.6%	9.7%	4.8%	25.9%	25.0%	23.8%	20.7%	17.6%	14.3%	16.7%	17.4%	26.1%	27.0%	13.8%	13.0%
Yes, other	1.7%	1.4%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	2.4%	4.3%	0.0%	5.4%	3.4%	0.0%



# STAFF MOVEMENT & BUSINESS PRIORITIES

## Staff Departures - Did any staff members leave your business between July 2019 to September 2019?

Response	Total NSW JUN19	Total NSW SEP19	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	53.4%	51.0%	42.8%	48.4%	76.2%	57.7%	41.7%	42.9%	55.2%	60.6%	64.3%	52.4%	58.7%	46.8%	43.2%	51.7%	69.6%
Yes (total)	46.6%	49.0%	57.2%	51.6%	23.8%	42.3%	58.3%	57.1%	44.8%	39.4%	35.7%	47.6%	41.3%	53.2%	56.8%	48.3%	30.4%
Yes, employee initiated	36.6%	37.4%	42.8%	45.2%	19.0%	30.8%	45.8%	52.4%	31.0%	27.3%	28.6%	35.7%	21.7%	46.8%	43.2%	41.4%	21.7%
Yes, employer initiated, to reduce costs	6.2%	7.0%	11.2%	3.2%	4.8%	3.8%	4.2%	4.8%	3.4%	9.1%	0.0%	4.8%	6.5%	8.5%	8.1%	3.4%	4.3%
Yes, employer initiated, due to performance issues	8.2%	13.3%	16.0%	9.7%	0.0%	7.7%	16.7%	19.0%	17.2%	3.0%	10.7%	9.5%	10.9%	21.3%	21.6%	10.3%	8.7%
Yes, employer initiated, other	2.1%	2.5%	3.2%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	6.1%	3.6%	2.4%	4.3%	4.3%	2.7%	0.0%	0.0%

## 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	10.0%	71.2%	9.7%	21.6%	33.6%
Minor priority	27.9%	18.3%	26.0%	35.8%	34.2%
Major priority	60.0%	8.1%	62.3%	39.6%	28.8%
Not sure	2.1%	2.5%	2.0%	3.1%	3.3%



# COST REDUCTION PRIORITIES



Cost	ALL REGIONS JUN 19	ALL REGIONS SEP 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	25.6%	28.2%	33.9%	32.3%	17.4%	20.0%	13.0%	30.0%	25.8%	31.3%	21.4%	20.9%	26.1%	27.3%	28.9%	27.6%	45.5%
Electricity / Energy	42.5%	40.8%	29.4%	45.2%	65.2%	36.0%	47.8%	35.0%	51.6%	37.5%	39.3%	46.5%	56.5%	36.4%	36.8%	51.7%	54.5%
Errors / Wastage	38.1%	41.8%	38.3%	41.9%	43.5%	36.0%	60.9%	60.0%	51.6%	40.6%	25.0%	39.5%	54.3%	31.8%	34.2%	37.9%	68.2%
Freight / Distribution	14.2%	14.8%	14.4%	9.7%	17.4%	4.0%	26.1%	10.0%	6.5%	12.5%	17.9%	16.3%	17.4%	11.4%	28.9%	13.8%	18.2%
Inefficiency / Unproductive work	56.2%	55.8%	56.1%	51.6%	52.2%	52.0%	69.6%	60.0%	58.1%	46.9%	46.4%	53.5%	52.2%	54.5%	63.2%	69.0%	59.1%
Labour / Staff	30.7%	30.5%	28.9%	35.5%	30.4%	20.0%	39.1%	35.0%	19.4%	31.3%	32.1%	37.2%	30.4%	22.7%	34.2%	41.4%	36.4%
Marketing and Advertising	17.8%	15.8%	13.9%	16.1%	13.0%	16.0%	8.7%	20.0%	16.1%	21.9%	25.0%	16.3%	17.4%	11.4%	10.5%	20.7%	22.7%
Operating costs	45.0%	47.1%	46.1%	54.8%	69.6%	48.0%	65.2%	15.0%	51.6%	46.9%	35.7%	46.5%	41.3%	47.7%	63.2%	41.4%	36.4%
Overheads	40.5%	38.9%	41.7%	29.0%	52.2%	20.0%	43.5%	25.0%	35.5%	62.5%	35.7%	34.9%	50.0%	29.5%	21.1%	41.4%	40.9%
Rent	9.8%	10.0%	13.9%	3.2%	13.0%	12.0%	8.7%	10.0%	9.7%	3.1%	7.1%	7.0%	4.3%	13.6%	7.9%	3.4%	22.7%
Telecommunications (Phone/Internet)	19.4%	19.2%	16.7%	16.1%	26.1%	16.0%	21.7%	15.0%	22.6%	21.9%	25.0%	14.0%	23.9%	15.9%	15.8%	24.1%	31.8%
Transport (vehicle/fuel)	12.5%	13.1%	14.4%	16.1%	13.0%	12.0%	4.3%	5.0%	12.9%	12.5%	17.9%	14.0%	21.7%	6.8%	7.9%	13.8%	9.1%
Wages	24.1%	24.4%	17.8%	22.6%	26.1%	20.0%	21.7%	30.0%	16.1%	21.9%	21.4%	23.3%	34.8%	25.0%	36.8%	37.9%	40.9%



# TOP CAPABILITIES & TECHNICAL SKILLS

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

Response	All Regions JUN 19	All Regions SEP 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	39.2%	32.1%	30.5%	32.3%	33.3%	37.0%	33.3%	33.3%	37.9%	35.3%	32.1%	23.8%	37.0%	40.4%	24.3%	24.1%	34.8%
Team Work	38.5%	29.9%	24.7%	29.0%	38.1%	25.9%	50.0%	28.6%	31.0%	35.3%	28.6%	31.0%	37.0%	29.8%	27.0%	37.9%	26.1%
Literacy/Numeracy	12.4%	9.1%	7.4%	22.6%	4.8%	11.1%	8.3%	0.0%	13.8%	5.9%	10.7%	11.9%	10.9%	0.0%	13.5%	6.9%	21.7%
Problem Solving	34.7%	33.8%	36.8%	32.3%	19.0%	29.6%	25.0%	19.0%	31.0%	38.2%	35.7%	19.0%	39.1%	40.4%	43.2%	31.0%	39.1%
Initiative and Enterprise	23.4%	24.5%	26.3%	9.7%	38.1%	14.8%	8.3%	28.6%	20.7%	20.6%	28.6%	31.0%	23.9%	36.2%	21.6%	17.2%	30.4%
Planning and Organising	28.3%	32.7%	30.0%	19.4%	33.3%	22.2%	37.5%	47.6%	20.7%	29.4%	46.4%	42.9%	43.5%	29.8%	45.9%	34.5%	17.4%
Self-Management	29.8%	27.7%	20.0%	35.5%	28.6%	33.3%	50.0%	28.6%	27.6%	35.3%	17.9%	31.0%	26.1%	23.4%	32.4%	41.4%	34.8%
Learning	4.6%	6.0%	4.2%	9.7%	9.5%	11.1%	4.2%	19.0%	6.9%	0.0%	3.6%	9.5%	4.3%	2.1%	13.5%	3.4%	0.0%
Technology	22.9%	23.3%	27.9%	22.6%	9.5%	33.3%	12.5%	19.0%	10.3%	11.8%	17.9%	28.6%	15.2%	36.2%	21.6%	31.0%	17.4%
Leadership	17.6%	18.2%	21.6%	12.9%	9.5%	18.5%	25.0%	14.3%	10.3%	17.6%	28.6%	14.3%	19.6%	21.3%	5.4%	17.2%	21.7%
Creativity	12.1%	14.5%	16.8%	12.9%	9.5%	11.1%	16.7%	9.5%	13.8%	17.6%	7.1%	9.5%	15.2%	14.9%	10.8%	20.7%	13.0%

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

Response	All Regions JUN 19	All Regions SEP 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	18.3%	21.2%	22.1%	22.6%	4.8%	18.5%	16.7%	14.3%	27.6%	23.5%	14.3%	7.1%	23.9%	44.7%	21.6%	20.7%	17.4%
Industry Knowledge/Relevant Experience	70.7%	65.6%	61.1%	61.3%	81.0%	74.1%	58.3%	57.1%	65.5%	61.8%	67.9%	64.3%	63.0%	68.1%	73.0%	75.9%	69.6%
Proficiency in a Foreign Language/Specific Language Skills	1.5%	1.3%	1.6%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	2.9%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	4.3%
Trade/Vocational Skills	28.1%	27.2%	22.1%	32.3%	42.9%	29.6%	41.7%	28.6%	37.9%	17.6%	28.6%	26.2%	21.7%	23.4%	29.7%	31.0%	39.1%
Information Technology/Computer Proficiency	25.4%	23.7%	25.3%	25.8%	33.3%	25.9%	12.5%	19.0%	17.2%	11.8%	25.0%	21.4%	26.1%	36.2%	18.9%	27.6%	13.0%
Finance/Accounting Expertise	11.3%	12.4%	14.2%	12.9%	9.5%	11.1%	12.5%	23.8%	6.9%	0.0%	14.3%	16.7%	15.2%	8.5%	16.2%	13.8%	4.3%
Marketing/Sales/Media Skills	31.8%	29.9%	33.2%	38.7%	19.0%	22.2%	25.0%	23.8%	27.6%	17.6%	35.7%	28.6%	28.3%	31.9%	40.5%	20.7%	26.1%
Project/Risk Management	13.3%	11.3%	14.7%	9.7%	9.5%	11.1%	0.0%	14.3%	3.4%	17.6%	3.6%	21.4%	2.2%	10.6%	10.8%	17.2%	4.3%
Administrative/Clerical Skills	17.2%	13.2%	12.1%	16.1%	14.3%	3.7%	8.3%	14.3%	3.4%	8.8%	28.6%	14.3%	21.7%	10.6%	13.5%	17.2%	8.7%
Counselling/Care-Giving skills	4.1%	5.3%	4.2%	0.0%	0.0%	11.1%	4.2%	14.3%	3.4%	5.9%	3.6%	2.4%	10.9%	8.5%	8.1%	3.4%	4.3%
Digital skills	13.3%	14.9%	18.4%	19.4%	9.5%	11.1%	12.5%	9.5%	6.9%	14.7%	14.3%	26.2%	6.5%	14.9%	16.2%	10.3%	8.7%

Region	Percentage
Capital Region	3.4%
Central Coast	5.1%
Central West	4.3%
Coffs Harbour - Grafton	3.6%
Far West and Orana	3.0%
Hunter Valley exc Newcastle	5.7%
Illawarra	6.3%
Mid North Coast	4.6%
Murray	5.7%
New England and North West	6.4%
Newcastle and Lake Macquarie	7.8%
Richmond - Tweed	6.0%
Riverina	4.7%
Southern Highlands and Shoalhaven	3.5%
Sydney	29.9%

Industry	Percentage
Primary	5.1%
Population Serving	40.7%
Knowledge Intensive	27.0%
Industrial	16.7%
Health and Education	10.6%

Number of Employees	Percentage
More than 200	9.0%
21 to 200	26.0%
5 to 20	35.3%
1 to 4	19.9%
Non-employing / Sole Operator	9.8%

## 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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