

# INDUSTRY RECAP

September 2019





# KEY BUSINESS CONDITIONS



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



## Industry Categories

Primary 44 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-19.5	19.5%	41.5%	39.0%	-30.8	↑	9.8%	41.5%	48.8%	-39.0
Total Capital Spending	-27.0	27.0%	18.9%	54.1%	-20.0	↓	13.9%	36.1%	50.0%	-36.1
Total Operating Costs	10.8	32.4%	45.9%	21.6%	31.4	↓	27.0%	48.6%	24.3%	2.7
Total Sales Revenue	-33.3	25.0%	16.7%	58.3%	-15.2	↓	25.0%	33.3%	41.7%	-16.7
Total Profit	-43.2	18.9%	18.9%	62.2%	-26.5	↓	24.3%	24.3%	51.4%	-27.0
Total Staff Numbers	-13.5	13.5%	59.5%	27.0%	-20.0	↑	10.8%	62.2%	27.0%	-16.2

Population Serving 353 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-41.0	9.9%	39.2%	50.9%	-38.9	↓	32.4%	36.1%	31.5%	0.9
Total Capital Spending	-17.8	23.0%	36.1%	40.9%	-24.6	↑	22.3%	40.8%	36.9%	-14.6
Total Operating Costs	34.8	44.9%	44.9%	10.1%	26.8	↑	40.7%	50.7%	8.6%	32.1
Total Sales Revenue	-31.6	18.9%	30.5%	50.5%	-36.6	↑	33.8%	31.9%	34.2%	-0.4
Total Profit	-45.4	12.3%	30.1%	57.6%	-46.4	↑	26.2%	32.3%	41.4%	-15.2
Total Staff Numbers	-13.1	8.7%	69.5%	21.8%	-15.2	↑	12.5%	73.8%	13.7%	-1.1

Knowledge Intensive 234 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-15.4	22.0%	40.7%	37.4%	-18.5	↑	28.5%	39.7%	31.8%	-3.3
Total Capital Spending	-18.6	17.5%	46.3%	36.2%	-8.8	↓	15.3%	55.4%	29.4%	-14.1
Total Operating Costs	19.8	33.2%	53.5%	13.4%	17.3	↑	27.5%	63.2%	9.3%	18.1
Total Sales Revenue	-0.5	31.9%	35.7%	32.4%	-4.1	↑	35.2%	41.2%	23.6%	11.5
Total Profit	-15.1	25.9%	33.0%	41.1%	-15.8	↑	30.0%	41.1%	28.9%	1.1
Total Staff Numbers	-1.1	11.9%	75.1%	13.0%	-3.1	↑	12.8%	74.3%	12.8%	0.0





# KEY BUSINESS CONDITIONS



Industrial 145 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-17.4	23.5%	35.6%	40.9%	-18.8	↑	26.5%	40.9%	32.6%	-6.1
Total Capital Spending	-11.9	22.0%	44.0%	33.9%	-9.9	↓	21.7%	41.5%	36.8%	-15.1
Total Operating Costs	41.6	48.7%	44.2%	7.1%	38.6	↑	39.8%	56.5%	3.7%	36.1
Total Sales Revenue	-4.5	28.8%	37.8%	33.3%	-9.0	↑	30.8%	40.2%	29.0%	1.9
Total Profit	-25.9	18.8%	36.6%	44.6%	-24.3	↓	22.6%	37.7%	39.6%	-17.0
Total Staff Numbers	2.7	17.9%	67.0%	15.2%	1.4	↑	14.8%	71.3%	13.9%	0.9

Health and Education 92 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	6.9	24.1%	58.6%	17.2%	-18.5	↑	31.0%	44.8%	24.1%	6.9
Total Capital Spending	7.1	30.0%	47.1%	22.9%	1.4	↑	31.3%	53.1%	15.6%	15.6
Total Operating Costs	41.4	44.3%	52.9%	2.9%	32.0	↑	41.5%	50.8%	7.7%	33.8
Total Sales Revenue	18.2	33.3%	51.5%	15.2%	1.3	↑	35.5%	48.4%	16.1%	19.4
Total Profit	-3.0	28.4%	40.3%	31.3%	-21.6	↑	27.4%	50.0%	22.6%	4.8
Total Staff Numbers	7.1	24.3%	58.6%	17.1%	12.2	↓	22.7%	69.7%	7.6%	15.2



## Industries

Accommodation & Food Services 75 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-45.6	8.8%	36.8%	54.4%	-48.1	↑	36.8%	36.8%	26.5%	10.3
Total Capital Spending	0.0	33.9%	32.1%	33.9%	-28.6	↑	21.4%	42.9%	35.7%	-14.3
Total Operating Costs	37.5	46.4%	44.6%	8.9%	31.2	↑	49.1%	42.1%	8.8%	40.4
Total Sales Revenue	-42.1	14.0%	29.8%	56.1%	-50.6	↑	44.6%	25.0%	30.4%	14.3
Total Profit	-48.2	10.7%	30.4%	58.9%	-54.5	↑	36.8%	28.1%	35.1%	1.8
Total Staff Numbers	-26.3	1.8%	70.2%	28.1%	-31.2	↑	17.5%	68.4%	14.0%	3.5

Construction 41 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-27.8	13.9%	44.4%	41.7%	-11.8	↓	22.2%	41.7%	36.1%	-13.9
Total Capital Spending	0.0	25.8%	48.4%	25.8%	13.3	↓	45.2%	38.7%	16.1%	29.0
Total Operating Costs	38.7	45.2%	48.4%	6.5%	38.7	↓	41.9%	51.6%	6.5%	35.5
Total Sales Revenue	-9.7	32.3%	25.8%	41.9%	3.2	↓	36.7%	36.7%	26.7%	10.0
Total Profit	-23.3	23.3%	30.0%	46.7%	-12.9	↓	30.0%	40.0%	30.0%	0.0
Total Staff Numbers	0.0	16.1%	67.7%	16.1%	16.1	↓	16.1%	77.4%	6.5%	9.7



# KEY BUSINESS CONDITIONS



Financial & Insurance Services 37 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-25.7	20.0%	34.3%	45.7%	-14.7	↓	17.1%	51.4%	31.4%	-14.3
Total Capital Spending	-16.0	20.0%	44.0%	36.0%	-21.9	↑	15.4%	50.0%	34.6%	-19.2
Total Operating Costs	32.1	39.3%	53.6%	7.1%	20.6	↑	33.3%	59.3%	7.4%	25.9
Total Sales Revenue	10.7	32.1%	46.4%	21.4%	-5.9	↑	40.7%	33.3%	25.9%	14.8
Total Profit	-14.3	17.9%	50.0%	32.1%	-17.6	↑	25.9%	37.0%	37.0%	-11.1
Total Staff Numbers	-13.8	10.3%	65.5%	24.1%	-6.1	↓	19.2%	61.5%	19.2%	0.0

Manufacturing 78 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-11.6	24.6%	39.1%	36.2%	-13.8	↑	30.4%	42.0%	27.5%	2.9
Total Capital Spending	-5.3	24.6%	45.6%	29.8%	-3.5	↓	21.4%	37.5%	41.1%	-19.6
Total Operating Costs	44.1	47.5%	49.2%	3.4%	38.6	↑	35.1%	63.2%	1.8%	33.3
Total Sales Revenue	-12.3	22.8%	42.1%	35.1%	-8.0	↓	33.9%	42.9%	23.2%	10.7
Total Profit	-34.5	12.1%	41.4%	46.6%	-24.1	↓	25.5%	34.5%	40.0%	-14.5
Total Staff Numbers	5.0	18.3%	68.3%	13.3%	0.0	↑	15.5%	72.4%	12.1%	3.4

Business Services 193 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-12.5	22.7%	42.0%	35.2%	-19.9	↑	31.3%	38.1%	30.7%	0.6
Total Capital Spending	-18.7	17.3%	46.7%	36.0%	-5.8	↓	15.4%	56.4%	28.2%	-12.8
Total Operating Costs	17.2	31.8%	53.5%	14.6%	16.5	↑	26.8%	63.4%	9.8%	17.0
Total Sales Revenue	-2.6	32.3%	32.9%	34.8%	-3.8	↑	34.6%	41.8%	23.5%	11.1
Total Profit	-14.8	27.7%	29.7%	42.6%	-16.6	↑	31.1%	41.7%	27.2%	4.0
Total Staff Numbers	1.3	12.3%	76.6%	11.0%	-2.6	↑	11.9%	76.2%	11.9%	0.0

Retail & Wholesale Trade 140 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-63.8	6.9%	22.3%	70.8%	-39.0	↓	26.9%	30.8%	42.3%	-15.4
Total Capital Spending	-45.7	10.5%	33.3%	56.2%	-33.1	↓	11.7%	40.8%	47.6%	-35.9
Total Operating Costs	30.0	46.4%	37.3%	16.4%	27.1	↑	39.3%	50.5%	10.3%	29.0
Total Sales Revenue	-54.1	12.8%	20.2%	67.0%	-34.6	↓	20.2%	25.0%	54.8%	-34.6
Total Profit	-64.8	7.4%	20.4%	72.2%	-44.3	↓	14.3%	24.8%	61.0%	-46.7
Total Staff Numbers	-26.2	5.6%	62.6%	31.8%	-11.5	↓	9.7%	68.9%	21.4%	-11.7



# KEY BUSINESS CONDITIONS & SKILLS



Other Industries 304 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-9.9	19.4%	51.4%	29.2%	-28.9	↑	28.9%	41.5%	29.6%	-0.7
Total Capital Spending	-6.7	27.3%	38.7%	34.0%	-13.9	↑	25.2%	44.6%	30.2%	-5.0
Total Operating Costs	35.1	43.0%	49.2%	7.9%	28.6	↑	37.7%	52.6%	9.6%	28.1
Total Sales Revenue	0.4	29.7%	41.1%	29.2%	-17.3	↑	34.4%	43.0%	22.6%	11.8
Total Profit	-19.6	22.1%	36.2%	41.7%	-32.7	↑	26.9%	41.7%	31.4%	-4.5
Total Staff Numbers	2.9	17.8%	67.2%	14.9%	-4.0	↑	15.0%	73.1%	11.9%	3.1

Do you have suitably skilled staff?	Previous June 2019		Current September 2019	
Industry	Yes	No	Yes	No
<b>Primary</b>	60.7%	39.3%	61.8%	38.2%
Agriculture, Forestry & Fishing	68.2%	31.8%	58.3%	41.7%
Mining	33.3%	66.7%	70.0%	30.0%
<b>Population Serving Industries</b>	73.3%	26.7%	45.1%	54.9%
Construction	64.3%	35.7%	51.9%	48.1%
Retail Trade	77.4%	22.6%	40.3%	59.7%
Accommodation & Food Services	73.1%	26.9%	45.5%	54.5%
Arts & Recreation Services	83.3%	16.7%	34.6%	65.4%
Other Services	68.9%	31.1%	52.5%	47.5%
<b>Knowledge Intensive</b>	71.9%	28.1%	32.3%	67.7%
Information Media & Telecommunications	64.3%	35.7%	47.6%	52.4%
Financial & Insurance Services	76.0%	24.0%	43.5%	56.5%
Rental, Hiring & real Estate Services	71.4%	28.6%	27.8%	72.2%
Professional, Scientific & Technical Services	69.0%	31.0%	29.7%	70.3%
Administrative & Support Services	92.3%	7.7%	8.3%	91.7%
Public Administration & Safety	66.7%	33.3%	50.0%	50.0%
<b>Industrial</b>	66.7%	33.3%	40.8%	59.2%
Manufacturing	34.7%	27.4%	21.1%	26.6%
Electricity, Gas, Water & Waste	100.0%	0.0%	20.0%	80.0%
Wholesale Trade	85.2%	14.8%	32.0%	68.0%
Transport, Postal & Warehousing	72.2%	27.8%	50.0%	50.0%
<b>Health and Education</b>	69.4%	30.6%	61.9%	38.1%
Education & Training	75.0%	25.0%	35.0%	65.0%
Health Care & Social Assistance	66.7%	33.3%	74.4%	25.6%
<b>All Industries</b>	70.7%	29.3%	43.6%	56.4%



# INVESTMENT & STAFF MOVEMENT



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

Response	ALL INDUSTRIES JUN 19	ALL INDUSTRIES SEP 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
No	61.3%	60.8%	36.1%	60.9%	72.4%	57.4%	48.3%
Yes (total)	38.7%	39.2%	63.9%	39.1%	27.6%	42.6%	51.7%
Yes, to replace aging assets	21.0%	21.5%	38.9%	20.7%	17.1%	20.8%	28.3%
Yes, to improve product range or quality	10.0%	9.6%	11.1%	11.3%	4.1%	11.9%	13.3%
Yes, to increase capacity/meet increased demand	9.0%	11.9%	13.9%	10.2%	7.1%	15.8%	25.0%
Yes, to lower operational costs	5.8%	5.9%	19.4%	3.1%	6.5%	6.9%	6.7%
Yes, other reason	3.4%	3.9%	13.9%	5.1%	1.8%	2.0%	1.7%

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

Response	ALL INDUSTRIES JUN 19	ALL INDUSTRIES SEP 19	Primary	Population Serving	Knowledge Serving	Industrial	Health and Education
No	55.0%	51.3%	47.2%	57.4%	60.3%	34.7%	31.3%
Yes (total)	45.0%	48.7%	52.8%	42.6%	39.7%	65.3%	68.7%
Yes, to replace staff that left	30.0%	30.9%	30.6%	29.3%	21.3%	42.6%	44.8%
Yes, to obtain new skills	5.5%	8.7%	8.3%	5.5%	10.3%	10.9%	13.4%
Yes, to increase capacity/meet increased demand	14.3%	19.1%	19.4%	12.1%	17.8%	24.8%	40.3%
Yes, other	1.7%	1.4%	2.8%	2.3%	0.0%	1.0%	1.5%

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

Response	ALL INDUSTRIES JUN 19	ALL INDUSTRIES SEP 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
No	53.4%	51.0%	41.7%	58.7%	60.6%	32.7%	29.9%
Yes (total)	46.6%	49.0%	58.3%	41.3%	39.4%	67.3%	70.1%
Yes, employee initiated	36.6%	37.4%	36.1%	34.9%	28.0%	47.5%	56.7%
Yes, employer initiated, to reduce costs	6.2%	7.0%	11.1%	4.4%	8.0%	8.9%	9.0%
Yes, employer initiated, due to performance issues	8.2%	13.3%	8.3%	10.3%	10.3%	17.8%	28.4%
Yes, employer initiated, other	2.1%	2.5%	8.3%	1.2%	1.7%	2.0%	7.5%



# COST REDUCTION & BUSINESS PRIORITIES



Cost	ALL INDUSTRIES JUN 19	ALL INDUSTRIES SEP 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
Administration	25.6%	28.2%	28.6%	27.1%	24.8%	26.0%	44.6%
Electricity / Energy	42.5%	40.8%	57.1%	44.7%	32.9%	41.3%	35.4%
Errors / Wastage	38.1%	41.8%	48.6%	44.3%	32.9%	53.8%	30.8%
Freight / Distribution	14.2%	14.8%	22.9%	15.3%	4.3%	34.6%	3.1%
Inefficiency / Unproductive work	56.2%	55.8%	62.9%	52.2%	57.8%	56.7%	60.0%
Labour / Staff	30.7%	30.5%	37.1%	32.5%	21.7%	33.7%	35.4%
Marketing and Advertising	17.8%	15.8%	14.3%	19.2%	14.3%	9.6%	16.9%
Operating costs	45.0%	47.1%	45.7%	49.8%	43.5%	44.2%	50.8%
Overheads	40.5%	38.9%	28.6%	38.4%	37.3%	39.4%	49.2%
Rent	9.8%	10.0%	2.9%	11.0%	11.2%	6.7%	12.3%
Telecommunications (Phone/Internet)	19.4%	19.2%	20.0%	19.6%	22.4%	11.5%	21.5%
Transport (vehicle/fuel)	12.5%	13.1%	22.9%	12.2%	6.8%	18.3%	18.5%
Wages	24.1%	24.4%	37.1%	28.2%	14.3%	27.9%	21.5%

## 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%



# TOP CAPABILITIES & TECHNICAL SKILLS



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

Response	ALL INDUSTRIES JUN 19	ALL INDUSTRIES SEP 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
Communication	39.2%	32.1%	11.1%	33.1%	37.7%	24.8%	35.8%
Team Work	38.5%	29.9%	27.8%	34.2%	17.7%	32.7%	41.8%
Literacy/Numeracy	12.4%	9.1%	8.3%	9.7%	12.6%	6.9%	1.5%
Problem Solving	34.7%	33.8%	33.3%	27.6%	45.1%	28.7%	35.8%
Initiative and Enterprise	23.4%	24.5%	25.0%	27.6%	23.4%	23.8%	16.4%
Planning and Organising	28.3%	32.7%	33.3%	29.6%	29.7%	46.5%	31.3%
Self-Management	29.8%	27.7%	36.1%	30.0%	23.4%	29.7%	22.4%
Learning	4.6%	6.0%	5.6%	6.6%	0.0%	8.9%	14.9%
Technology	22.9%	23.3%	41.7%	17.1%	35.4%	15.8%	16.4%
Leadership	17.6%	18.2%	13.9%	14.0%	20.0%	21.8%	26.9%
Creativity	12.1%	14.5%	5.6%	17.5%	14.3%	13.9%	9.0%

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

Response	ALL INDUSTRIES JUN 19	ALL INDUSTRIES SEP 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
Tertiary Education	18.3%	21.2%	30.6%	12.8%	27.4%	12.9%	44.8%
Industry Knowledge/Relevant Experience	70.7%	65.6%	75.0%	66.9%	62.9%	67.3%	59.7%
Proficiency in a Foreign Language/Specific Language Skills	1.5%	1.3%	0.0%	1.2%	1.1%	2.0%	1.5%
Trade/Vocational Skills	28.1%	27.2%	47.2%	35.8%	6.9%	40.6%	16.4%
Information Technology/Computer Proficiency	25.4%	23.7%	25.0%	21.4%	34.3%	17.8%	13.4%
Finance/Accounting Expertise	11.3%	12.4%	8.3%	6.6%	21.7%	14.9%	9.0%
Marketing/Sales/Media Skills	31.8%	29.9%	27.8%	33.1%	32.6%	27.7%	14.9%
Project/Risk Management	13.3%	11.3%	16.7%	7.4%	16.6%	8.9%	13.4%
Administrative/Clerical Skills	17.2%	13.2%	5.6%	10.1%	17.1%	14.9%	16.4%
Counselling/Care-Giving skills	4.1%	5.3%	0.0%	2.7%	2.9%	0.0%	32.8%
Digital skills	13.3%	14.9%	8.3%	14.4%	22.3%	10.9%	7.5%



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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## **Survey Results**

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