



DROUGHT SURVEY

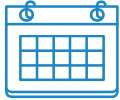
August 2018



84 per cent indicated they were impacted by the drought, **43 per cent** of which said the current drought was far more severe than previous droughts.



Approximately **1 in 3** affected businesses indicated the viability of their business was at risk due to current drought conditions.



4 in 5 affected businesses indicated cash flow had been affected due to drought conditions.



More than **2 in 3** affected businesses indicated they would scale back investment and reduce capital compared to previous plans.



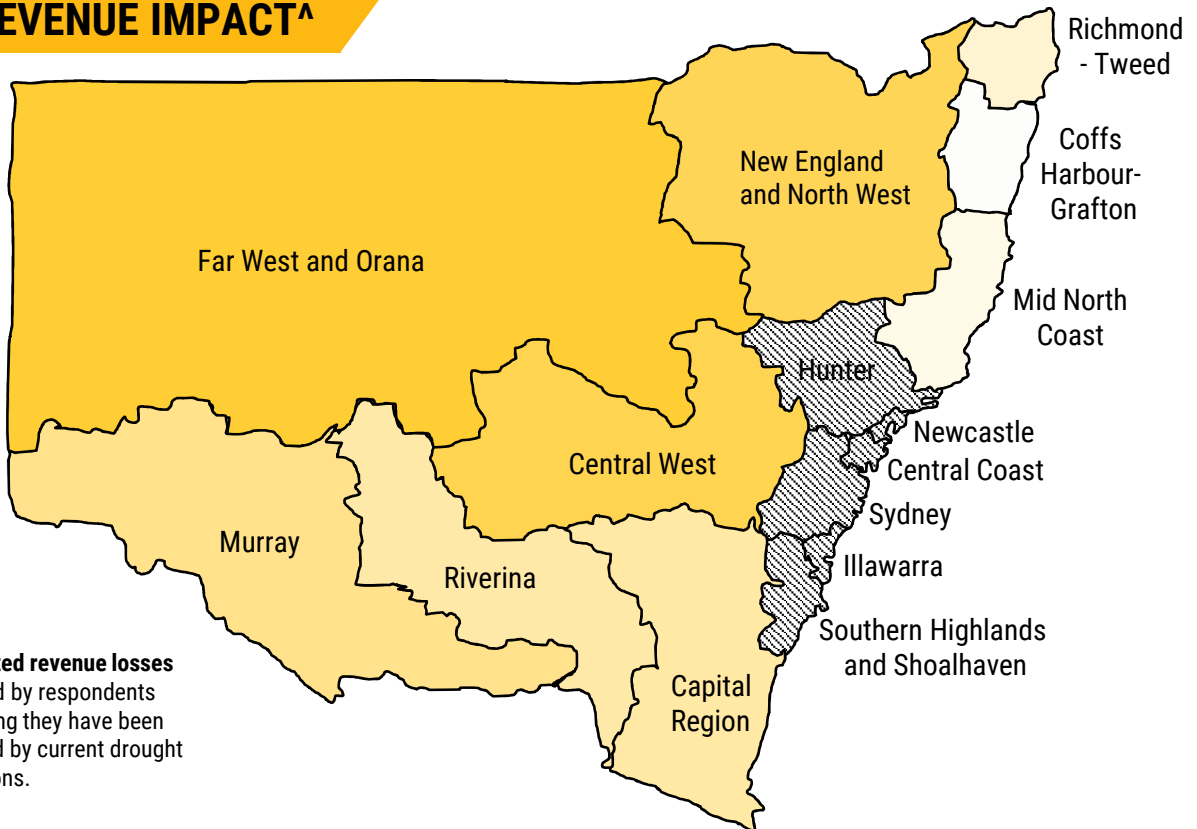
On average, affected businesses indicated they may have to reduce staffing levels by **1.5 employees**.



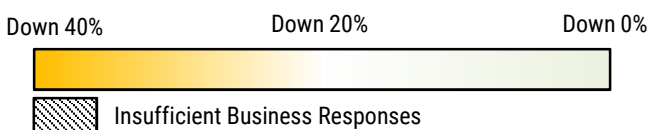
67% of businesses indicated that their local economy had been weakened due to drought.

Note: 'Affected businesses' refers to respondents indicating they had been impacted by the current drought.

REVENUE IMPACT[^]



[^]Weighted revenue losses reported by respondents indicating they have been affected by current drought conditions.





DROUGHT IMPACT - REGION



Has your business been impacted, either directly or indirectly, by drought conditions in NSW?

Region	n	Yes	No
NSW	943	83.7%	16.3%
Capital Region	41	83.3%	16.7%
Central Coast	32	16.0%	84.0%
Central West	176	93.9%	6.1%
Coffs Harbour - Grafton	32	65.5%	34.5%
Far West and Orana	185	98.3%	1.7%
Hunter Valley excluding Newcastle	5	75.0%	25.0%
Illawarra	17	35.7%	64.3%
Mid North Coast	61	55.8%	44.2%
Murray	94	83.1%	16.9%
New England and North West	112	93.5%	6.5%
Newcastle and Lake Macquarie	13	36.4%	63.6%
Richmond - Tweed	39	60.0%	40.0%
Riverina	107	88.4%	11.6%
Southern Highlands and Shoalhaven	17	86.7%	13.3%

Please select the manner in which your business has been affected?

Region	n	Primary producer unable to sustain production	We supply directly to primary producers	Our local economy has been weakened due to drought
NSW	683	27.2%	29.7%	67.3%
Capital Region	29	37.9%	37.9%	62.1%
Central Coast	4	50.0%	25.0%	25.0%
Central West	149	29.5%	22.8%	67.1%
Coffs Harbour - Grafton	18	27.8%	11.1%	83.3%
Far West and Orana	171	26.9%	34.5%	72.5%
Hunter Valley excluding Newcastle	3	0.0%	33.3%	66.7%
Illawarra	4	25.0%	25.0%	50.0%
Mid North Coast	27	37.0%	22.2%	55.6%
Murray	57	22.8%	29.8%	57.9%
New England and North West	99	19.2%	31.3%	74.7%
Newcastle and Lake Macquarie	3	0.0%	0.0%	100.0%
Richmond - Tweed	19	47.4%	21.1%	52.6%
Riverina	79	22.8%	39.2%	65.8%
Southern Highlands and Shoalhaven	13	38.5%	23.1%	53.8%

How exposed is your business to drought conditions?

Region	n	Only slightly exposed	Moderately exposed	Highly exposed
NSW	691	14.0%	43.6%	42.4%
Capital Region	29	17.2%	44.8%	37.9%
Central Coast	4	0.0%	50.0%	50.0%
Central West	151	11.9%	49.7%	38.4%
Coffs Harbour - Grafton	19	31.6%	47.4%	21.1%
Far West and Orana	171	9.9%	36.3%	53.8%
Hunter Valley excluding Newcastle	3	33.3%	66.7%	0.0%
Illawarra	5	20.0%	80.0%	0.0%
Mid North Coast	28	39.3%	39.3%	21.4%
Murray	57	17.5%	38.6%	43.9%
New England and North West	98	6.1%	41.8%	52.0%
Newcastle and Lake Macquarie	3	66.7%	33.3%	0.0%
Richmond - Tweed	21	19.0%	61.9%	19.0%
Riverina	81	17.3%	44.4%	38.3%
Southern Highlands and Shoalhaven	13	7.7%	53.8%	38.5%



DROUGHT IMPACT - INDUSTRY



Has your business been impacted, either directly or indirectly, by drought conditions in NSW?

Industry	n	Yes	No
All Industries	943	83.7%	16.3%
Accommodation and Food services	87	87.5%	12.5%
Agriculture, Forestry and Fishing	234	97.8%	2.2%
Construction	42	76.5%	23.5%
Financial and Insurance services	30	52.2%	47.8%
Manufacturing	61	61.4%	38.6%
Other business services	88	67.6%	32.4%
Other industries	223	75.0%	25.0%
Retail and wholesale trade	178	93.9%	6.1%

Please select the manner in which your business has been affected?

Industry	n	Primary producer unable to sustain production	We supply directly to primary producers	Our local economy has been weakened due to drought
All Industries	683	27.2%	29.7%	67.3%
Accommodation and Food services	63	7.9%	1.6%	96.8%
Agriculture, Forestry and Fishing	213	65.7%	38.0%	25.4%
Construction	25	8.0%	36.0%	76.0%
Financial and Insurance services	10	20.0%	30.0%	80.0%
Manufacturing	35	25.7%	62.9%	45.7%
Other business services	49	2.0%	32.7%	85.7%
Other industries	138	13.0%	27.5%	89.1%
Retail and wholesale trade	150	6.0%	22.0%	91.3%

How exposed is your business to drought conditions?

Industry	n	Only slightly exposed	Moderately exposed	Highly exposed
All Industries	691	14.0%	43.6%	42.4%
Accommodation and Food services	63	22.2%	57.1%	20.6%
Agriculture, Forestry and Fishing	216	3.7%	25.5%	70.8%
Construction	26	15.4%	61.5%	23.1%
Financial and Insurance services	10	30.0%	50.0%	20.0%
Manufacturing	35	2.9%	51.4%	45.7%
Other business services	49	32.7%	59.2%	8.2%
Other industries	141	23.4%	46.1%	30.5%
Retail and wholesale trade	151	11.9%	51.0%	37.1%



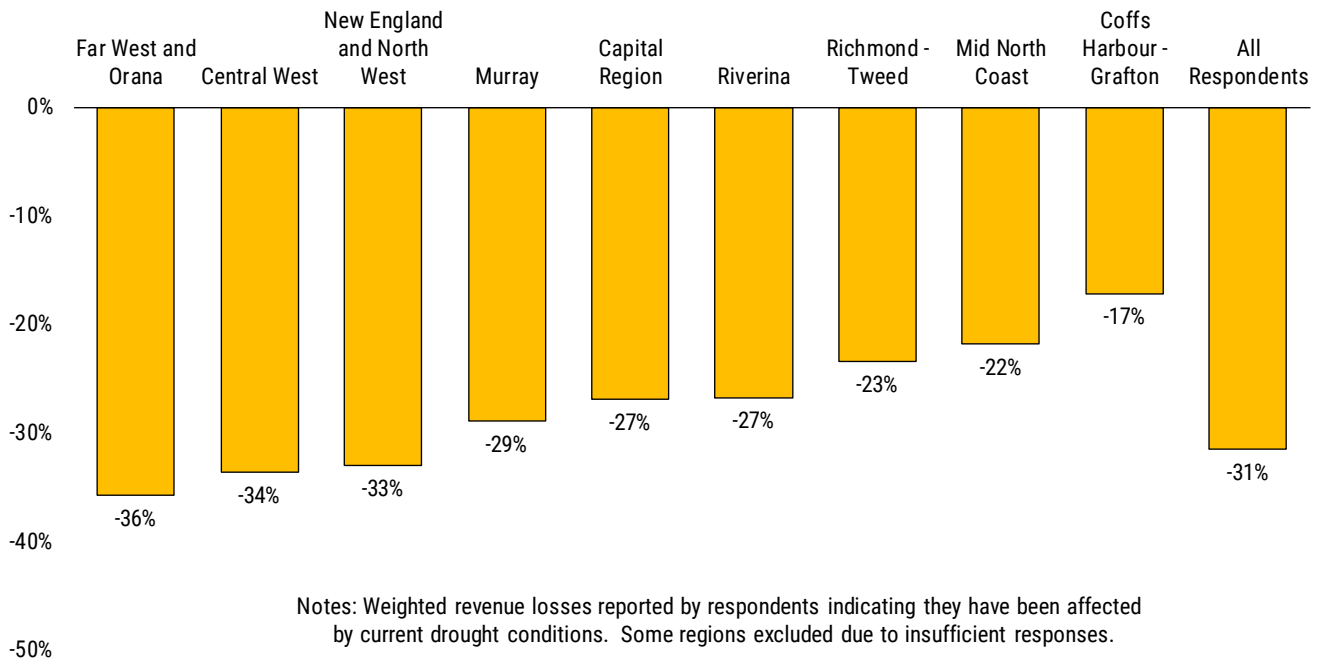
SALES - REGION



Is your business experiencing a decrease in sales/revenue due to drought conditions in NSW?

Region	n	Yes	No
NSW	783	87.5%	12.5%
Capital Region	34	75.0%	25.0%
Central Coast	10	57.1%	42.9%
Central West	162	87.9%	12.1%
Coffs Harbour - Grafton	22	100.0%	0.0%
Far West and Orana	178	96.5%	3.5%
Hunter Valley excluding Newcastle	4	66.7%	33.3%
Illawarra	8	42.9%	57.1%
Mid North Coast	37	65.5%	34.5%
Murray	80	86.9%	13.1%
New England and North West	104	94.0%	6.0%
Newcastle and Lake Macquarie	5	60.0%	40.0%
Richmond - Tweed	25	77.8%	22.2%
Riverina	89	81.8%	18.2%
Southern Highlands and Shoalhaven	15	90.0%	10.0%

By what percentage have sales/revenue been affected?





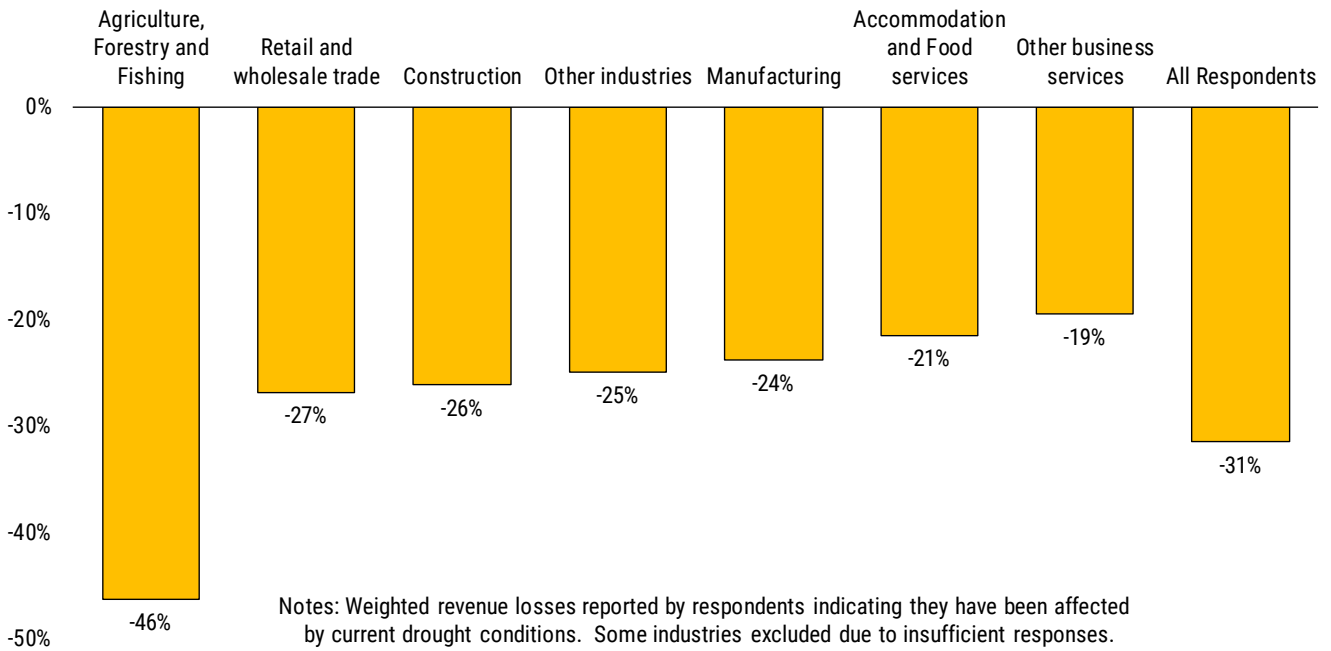
SALES - INDUSTRY



Is your business experiencing a decrease in sales/revenue due to drought conditions in NSW?

Industry	n	Yes	No
All Industries	783	87.5%	12.5%
Accommodation and Food services	78	90.3%	9.7%
Agriculture, Forestry and Fishing	223	91.8%	8.2%
Construction	33	79.3%	20.7%
Financial and Insurance services	16	58.3%	41.7%
Manufacturing	39	86.1%	13.9%
Other business services	63	85.1%	14.9%
Other industries	168	79.7%	20.3%
Retail and wholesale trade	163	93.1%	6.9%

By what percentage have sales/revenue been affected?





CASH FLOW - REGION



Has cash flow been affected due to current drought conditions?

Region	n	Yes	No
NSW	752	80.8%	19.2%
Capital Region	34	61.5%	38.5%
Central Coast	10	42.9%	57.1%
Central West	155	81.8%	18.2%
Coffs Harbour - Grafton	21	86.7%	13.3%
Far West and Orana	168	91.3%	8.8%
Hunter Valley excluding Newcastle	4	33.3%	66.7%
Illawarra	8	57.1%	42.9%
Mid North Coast	36	58.6%	41.4%
Murray	79	71.9%	28.1%
New England and North West	99	90.5%	9.5%
Newcastle and Lake Macquarie	3	66.7%	33.3%
Richmond - Tweed	24	80.0%	20.0%
Riverina	86	72.6%	27.4%
Southern Highlands and Shoalhaven	15	90.9%	9.1%

How has cash flow been affected?

Region	n	My business is unable to pay invoices on time and we have been given extended payment times	My business is unable to pay invoices and we will be unable to repay suppliers	Debtors have been unable to pay invoices and we have had to extend payment times	Debtors have been unable to pay invoices and we don't expect to recover debts	Other
NSW	489	33.9%	7.4%	42.3%	9.8%	36.8%
Capital Region	16	37.5%	18.8%	62.5%	12.5%	37.5%
Central Coast	3	0.0%	33.3%	33.3%	0.0%	33.3%
Central West	104	36.5%	1.9%	41.3%	4.8%	38.5%
Coffs Harbour - Grafton	12	50.0%	0.0%	50.0%	16.7%	16.7%
Far West and Orana	132	31.8%	10.6%	45.5%	12.1%	33.3%
Hunter Valley excluding Newcastle	1	0.0%	0.0%	0.0%	0.0%	100.0%
Illawarra	4	25.0%	0.0%	0.0%	0.0%	75.0%
Mid North Coast	17	29.4%	0.0%	23.5%	0.0%	47.1%
Murray	36	25.0%	0.0%	41.7%	5.6%	36.1%
New England and North West	82	34.1%	8.5%	43.9%	13.4%	40.2%
Newcastle and Lake Macquarie	2	0.0%	0.0%	0.0%	0.0%	100.0%
Richmond - Tweed	14	50.0%	7.1%	21.4%	0.0%	35.7%
Riverina	51	31.4%	11.8%	45.1%	9.8%	33.3%
Southern Highlands and Shoalhaven	10	80.0%	10.0%	50.0%	30.0%	30.0%

Are your suppliers, banks & utility providers understanding and working around your current situation?

Region	n	Yes	No	Have not discussed with them
NSW	628	22.1%	14.2%	63.7%
Capital Region	31	22.6%	9.7%	67.7%
Central Coast	6	0.0%	16.7%	83.3%
Central West	125	23.2%	9.6%	67.2%
Coffs Harbour - Grafton	17	29.4%	0.0%	70.6%
Far West and Orana	151	26.5%	17.2%	56.3%
Hunter Valley excluding Newcastle	2	0.0%	0.0%	100.0%
Illawarra	5	0.0%	40.0%	60.0%
Mid North Coast	28	10.7%	10.7%	78.6%
Murray	60	20.0%	6.7%	73.3%
New England and North West	89	18.0%	23.6%	58.4%
Newcastle and Lake Macquarie	1	0.0%	0.0%	100.0%
Richmond - Tweed	19	26.3%	0.0%	73.7%
Riverina	76	25.0%	14.5%	60.5%
Southern Highlands and Shoalhaven	13	15.4%	30.8%	53.8%



CASH FLOW - INDUSTRY



Has cash flow been affected due to current drought conditions?

Industry	n	Yes	No
All Industries	752	80.8%	19.2%
Accommodation and Food services	75	75.0%	25.0%
Agriculture, Forestry and Fishing	216	88.0%	12.0%
Construction	31	73.1%	26.9%
Financial and Insurance services	14	33.3%	66.7%
Manufacturing	39	77.8%	22.2%
Other business services	61	72.3%	27.7%
Other industries	161	73.0%	27.0%
Retail and wholesale trade	155	89.0%	11.0%

How has cash flow been affected?

Industry	n	My business is unable to pay invoices on time and we have been given extended payment times	My business is unable to pay invoices and we will be unable to repay suppliers	Debtors have been unable to pay invoices and we have had to extend payment times	Debtors have been unable to pay invoices and we don't expect to recover debts	Other
All Industries	489	33.9%	7.4%	42.3%	9.8%	36.8%
Accommodation and Food services	42	50.0%	2.4%	35.7%	4.8%	28.6%
Agriculture, Forestry and Fishing	163	29.4%	11.0%	33.1%	9.2%	46.0%
Construction	18	16.7%	5.6%	50.0%	5.6%	33.3%
Financial and Insurance services	3	0.0%	0.0%	66.7%	0.0%	33.3%
Manufacturing	25	36.0%	0.0%	64.0%	16.0%	32.0%
Other business services	33	12.1%	6.1%	78.8%	24.2%	21.2%
Other industries	90	22.2%	3.3%	37.8%	8.9%	50.0%
Retail and wholesale trade	115	53.0%	9.6%	44.3%	8.7%	22.6%

Are your suppliers, banks & utility providers understanding and working around your current situation?

Industry	n	Yes	No	Have not discussed with them
All Industries	628	22.1%	14.2%	63.7%
Accommodation and Food services	59	28.8%	10.2%	61.0%
Agriculture, Forestry and Fishing	187	31.0%	11.8%	57.2%
Construction	26	15.4%	7.7%	76.9%
Financial and Insurance services	11	27.3%	18.2%	54.5%
Manufacturing	34	29.4%	11.8%	58.8%
Other business services	47	6.4%	21.3%	72.3%
Other industries	127	11.8%	17.3%	70.9%
Retail and wholesale trade	137	21.2%	15.3%	63.5%



PREPAREDNESS - REGION



How well equipped is your business to mitigate risks associated with drought?

Region	n	Very well equipped	Moderately well equipped	Not well equipped
NSW	671	11.9%	70.9%	17.1%
Capital Region	34	14.7%	70.6%	14.7%
Central Coast	6	33.3%	66.7%	0.0%
Central West	138	9.4%	72.5%	18.1%
Coffs Harbour - Grafton	19	5.3%	73.7%	21.1%
Far West and Orana	155	12.3%	69.0%	18.7%
Hunter Valley excluding Newcastle	3	33.3%	66.7%	0.0%
Illawarra	6	33.3%	50.0%	16.7%
Mid North Coast	31	29.0%	61.3%	9.7%
Murray	66	10.6%	71.2%	18.2%
New England and North West	89	7.9%	69.7%	22.5%
Newcastle and Lake Macquarie	2	0.0%	50.0%	50.0%
Richmond - Tweed	19	15.8%	84.2%	0.0%
Riverina	83	12.0%	72.3%	15.7%
Southern Highlands and Shoalhaven	14	0.0%	85.7%	14.3%

In terms of impact on your business, how does the current drought compare with previous drought events?

Region	n	This drought is far more severe and has had a much bigger impact	This drought has had a similar impact to previous droughts	This drought is less of a concern than previous droughts	My business has never been affected by drought in the past
NSW	668	43.4%	40.4%	2.4%	13.8%
Capital Region	34	26.5%	58.8%	2.9%	11.8%
Central Coast	6	16.7%	50.0%	0.0%	33.3%
Central West	136	44.1%	37.5%	0.7%	17.6%
Coffs Harbour - Grafton	19	26.3%	68.4%	5.3%	0.0%
Far West and Orana	156	63.5%	26.3%	0.0%	10.3%
Hunter Valley excluding Newcastle	3	33.3%	33.3%	0.0%	33.3%
Illawarra	6	33.3%	0.0%	0.0%	66.7%
Mid North Coast	31	25.8%	58.1%	3.2%	12.9%
Murray	65	20.0%	56.9%	6.2%	16.9%
New England and North West	88	65.9%	23.9%	0.0%	10.2%
Newcastle and Lake Macquarie	2	0.0%	50.0%	0.0%	50.0%
Richmond - Tweed	19	15.8%	63.2%	5.3%	15.8%
Riverina	83	22.9%	59.0%	7.2%	10.8%
Southern Highlands and Shoalhaven	14	64.3%	7.1%	0.0%	28.6%

How concerned are you that the current drought will affect your business in the long term?

Region	n	Very concerned	Concerned	Somewhat Concerned	Not concerned
NSW	669	45.3%	32.3%	18.4%	4.0%
Capital Region	34	26.5%	41.2%	29.4%	2.9%
Central Coast	6	16.7%	50.0%	0.0%	33.3%
Central West	137	40.1%	36.5%	19.7%	3.6%
Coffs Harbour - Grafton	19	52.6%	36.8%	10.5%	0.0%
Far West and Orana	156	59.0%	23.1%	13.5%	4.5%
Hunter Valley excluding Newcastle	3	0.0%	66.7%	33.3%	0.0%
Illawarra	6	50.0%	33.3%	0.0%	16.7%
Mid North Coast	30	40.0%	33.3%	20.0%	6.7%
Murray	65	40.0%	32.3%	26.2%	1.5%
New England and North West	90	47.8%	35.6%	15.6%	1.1%
Newcastle and Lake Macquarie	2	0.0%	50.0%	0.0%	50.0%
Richmond - Tweed	18	33.3%	22.2%	27.8%	16.7%
Riverina	83	43.4%	32.5%	20.5%	3.6%
Southern Highlands and Shoalhaven	14	64.3%	21.4%	14.3%	0.0%



How well equipped is your business to mitigate risks associated with drought?

Industry	n	Very well equipped	Moderately well equipped	Not well equipped
All Industries	671	11.9%	70.9%	17.1%
Accommodation and Food services	65	15.4%	76.9%	7.7%
Agriculture, Forestry and Fishing	200	10.0%	71.5%	18.5%
Construction	29	20.7%	69.0%	10.3%
Financial and Insurance services	11	18.2%	81.8%	0.0%
Manufacturing	36	8.3%	75.0%	16.7%
Other business services	53	24.5%	67.9%	7.5%
Other industries	132	12.9%	73.5%	13.6%
Retail and wholesale trade	145	6.2%	64.8%	29.0%

In terms of impact on your business, how does the current drought compare with previous drought events?

Industry	n	This drought is far more severe and has had a much bigger impact	This drought has had a similar impact to previous droughts	This drought is less of a concern than previous droughts	My business has never been affected by drought in the past
All Industries	668	43.4%	40.4%	2.4%	13.8%
Accommodation and Food services	65	35.4%	38.5%	1.5%	24.6%
Agriculture, Forestry and Fishing	199	54.8%	36.7%	2.5%	6.0%
Construction	28	35.7%	53.6%	3.6%	7.1%
Financial and Insurance services	11	9.1%	63.6%	0.0%	27.3%
Manufacturing	36	41.7%	47.2%	5.6%	5.6%
Other business services	53	39.6%	39.6%	3.8%	17.0%
Other industries	134	40.3%	40.3%	1.5%	17.9%
Retail and wholesale trade	142	40.1%	40.8%	2.1%	16.9%

How concerned are you that the current drought will affect your business in the long term?

Industry	n	Very concerned	Concerned	Somewhat Concerned	Not concerned
All Industries	669	45.3%	32.3%	18.4%	4.0%
Accommodation and Food services	64	46.9%	25.0%	23.4%	4.7%
Agriculture, Forestry and Fishing	198	58.1%	28.3%	11.6%	2.0%
Construction	28	39.3%	39.3%	10.7%	10.7%
Financial and Insurance services	11	45.5%	36.4%	9.1%	9.1%
Manufacturing	35	45.7%	37.1%	17.1%	0.0%
Other business services	53	17.0%	50.9%	20.8%	11.3%
Other industries	134	35.8%	32.1%	26.9%	5.2%
Retail and wholesale trade	146	47.3%	31.5%	19.2%	2.1%



BUSINESS RESPONSE - REGION



Do you anticipate that you may need to reduce staff numbers due to the drought? If yes, please indicate the potential staffing numbers affected

Region	n	I don't intend to reduce staff numbers	1	2 - 3	4 - 5	5 - 10	10 - 15	15 - 20	More than 20
NSW	629	40.2%	24.3%	19.9%	6.5%	1.6%	1.4%	0.8%	5.2%
Capital Region	31	41.9%	35.5%	9.7%	6.5%	0.0%	0.0%	0.0%	6.5%
Central Coast	6	50.0%	16.7%	16.7%	0.0%	0.0%	0.0%	0.0%	16.7%
Central West	128	43.8%	27.3%	15.6%	4.7%	0.8%	1.6%	0.0%	6.3%
Coffs Harbour - Grafton	17	41.2%	5.9%	23.5%	11.8%	0.0%	0.0%	0.0%	17.6%
Far West and Orana	146	29.5%	29.5%	25.3%	6.8%	0.7%	2.7%	0.0%	5.5%
Hunter Valley excluding Newcastle	2	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Illawarra	5	60.0%	20.0%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mid North Coast	30	63.3%	16.7%	3.3%	10.0%	3.3%	0.0%	0.0%	3.3%
Murray	62	40.3%	24.2%	24.2%	3.2%	1.6%	0.0%	3.2%	3.2%
New England and North West	83	30.1%	24.1%	24.1%	9.6%	2.4%	2.4%	2.4%	4.8%
Newcastle and Lake Macquarie	2	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%
Richmond - Tweed	19	52.6%	21.1%	15.8%	5.3%	0.0%	0.0%	0.0%	5.3%
Riverina	79	48.1%	16.5%	17.7%	8.9%	3.8%	1.3%	1.3%	2.5%
Southern Highlands and Shoalhaven	13	46.2%	15.4%	30.8%	0.0%	7.7%	0.0%	0.0%	0.0%

How have current drought conditions affected capital spending?

Region	n	We have had to scale back capital spending compared to earlier plans	Our capital spending is unaffected compared to earlier plans
NSW	653	76.6%	23.4%
Capital Region	32	80.0%	20.0%
Central Coast	6	50.0%	50.0%
Central West	134	78.8%	21.2%
Coffs Harbour - Grafton	17	75.0%	25.0%
Far West and Orana	152	85.5%	14.5%
Hunter Valley excluding Newcastle	3	0.0%	100.0%
Illawarra	5	40.0%	60.0%
Mid North Coast	30	56.5%	43.5%
Murray	64	75.5%	24.5%
New England and North West	89	87.0%	13.0%
Newcastle and Lake Macquarie	2	0.0%	100.0%
Richmond - Tweed	19	57.1%	42.9%
Riverina	80	65.7%	34.3%
Southern Highlands and Shoalhaven	14	58.3%	41.7%

Do you anticipate that you will need to close down your business because of the drought?

Region	n	Yes - my business will need to close or be significantly scaled back	No - my business remains viable	Maybe - my business will be at risk if conditions deteriorate
NSW	656	6.7%	63.1%	30.2%
Capital Region	32	6.5%	77.4%	16.1%
Central Coast	6	0.0%	83.3%	16.7%
Central West	135	8.9%	56.9%	34.1%
Coffs Harbour - Grafton	17	0.0%	71.4%	28.6%
Far West and Orana	153	6.2%	54.1%	39.7%
Hunter Valley excluding Newcastle	3	0.0%	100.0%	0.0%
Illawarra	5	0.0%	80.0%	20.0%
Mid North Coast	30	7.1%	71.4%	21.4%
Murray	65	1.7%	75.0%	23.3%
New England and North West	89	7.2%	61.4%	31.3%
Newcastle and Lake Macquarie	2	0.0%	100.0%	0.0%
Richmond - Tweed	19	0.0%	73.7%	26.3%
Riverina	80	9.7%	66.7%	23.6%
Southern Highlands and Shoalhaven	14	16.7%	50.0%	33.3%



BUSINESS RESPONSE - INDUSTRY



Do you anticipate that you may need to reduce staff numbers due to the drought? If yes, please indicate the potential staffing numbers affected

Industry	n	I don't intend to reduce staff numbers	1	2 - 3	4 - 5	5 - 10	10 - 15	15 - 20	More than 20
All Industries	629	40.2%	24.3%	19.9%	6.5%	1.6%	1.4%	0.8%	5.2%
Accommodation and Food services	59	30.5%	23.7%	30.5%	8.5%	0.0%	1.7%	1.7%	3.4%
Agriculture, Forestry and Fishing	186	37.6%	22.6%	18.8%	9.7%	2.7%	1.1%	1.1%	6.5%
Construction	26	30.8%	38.5%	19.2%	7.7%	0.0%	0.0%	0.0%	3.8%
Financial and Insurance services	11	72.7%	27.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Manufacturing	35	34.3%	8.6%	25.7%	14.3%	0.0%	5.7%	2.9%	8.6%
Other business services	49	61.2%	16.3%	14.3%	0.0%	0.0%	2.0%	0.0%	6.1%
Other industries	127	47.2%	20.5%	22.8%	3.1%	3.1%	0.8%	0.0%	2.4%
Retail and wholesale trade	136	34.6%	34.6%	16.2%	5.1%	0.7%	1.5%	0.7%	6.6%

How have current drought conditions affected capital spending?

Industry	n	We have had to scale back capital spending compared to earlier plans	Our capital spending is unaffected compared to earlier plans
All Industries	653	76.6%	23.4%
Accommodation and Food services	64	67.9%	32.1%
Agriculture, Forestry and Fishing	196	87.4%	12.6%
Construction	25	66.7%	33.3%
Financial and Insurance services	11	12.5%	87.5%
Manufacturing	35	73.3%	26.7%
Other business services	50	50.0%	50.0%
Other industries	131	72.8%	27.2%
Retail and wholesale trade	141	83.3%	16.7%

Do you anticipate that you will need to close down your business because of the drought?

Industry	n	Yes - my business will need to close or be significantly scaled back	No - my business remains viable	Maybe - my business will be at risk if conditions deteriorate
All Industries	656	6.7%	63.1%	30.2%
Accommodation and Food services	64	4.7%	67.2%	23.4%
Agriculture, Forestry and Fishing	196	9.2%	44.9%	38.3%
Construction	25	4.0%	68.0%	20.0%
Financial and Insurance services	11	0.0%	100.0%	0.0%
Manufacturing	35	8.6%	57.1%	25.7%
Other business services	50	2.0%	88.0%	6.0%
Other industries	133	3.0%	65.4%	22.6%
Retail and wholesale trade	142	7.7%	52.8%	33.1%

Region	n	Percentage
Capital Region	41	4.3%
Central Coast	33	3.5%
Central West	179	18.9%
Coffs Harbour - Grafton	34	3.6%
Far West and Orana	186	19.7%
Hunter Valley excluding Newcastle	5	0.5%
Illawarra	17	1.8%
Mid North Coast	62	6.6%
Murray	94	9.9%
New England and North West	112	11.9%
Newcastle and Lake Macquarie	13	1.4%
Richmond - Tweed	39	4.1%
Riverina	107	11.3%
Southern Highlands and Shoalhaven	17	1.8%

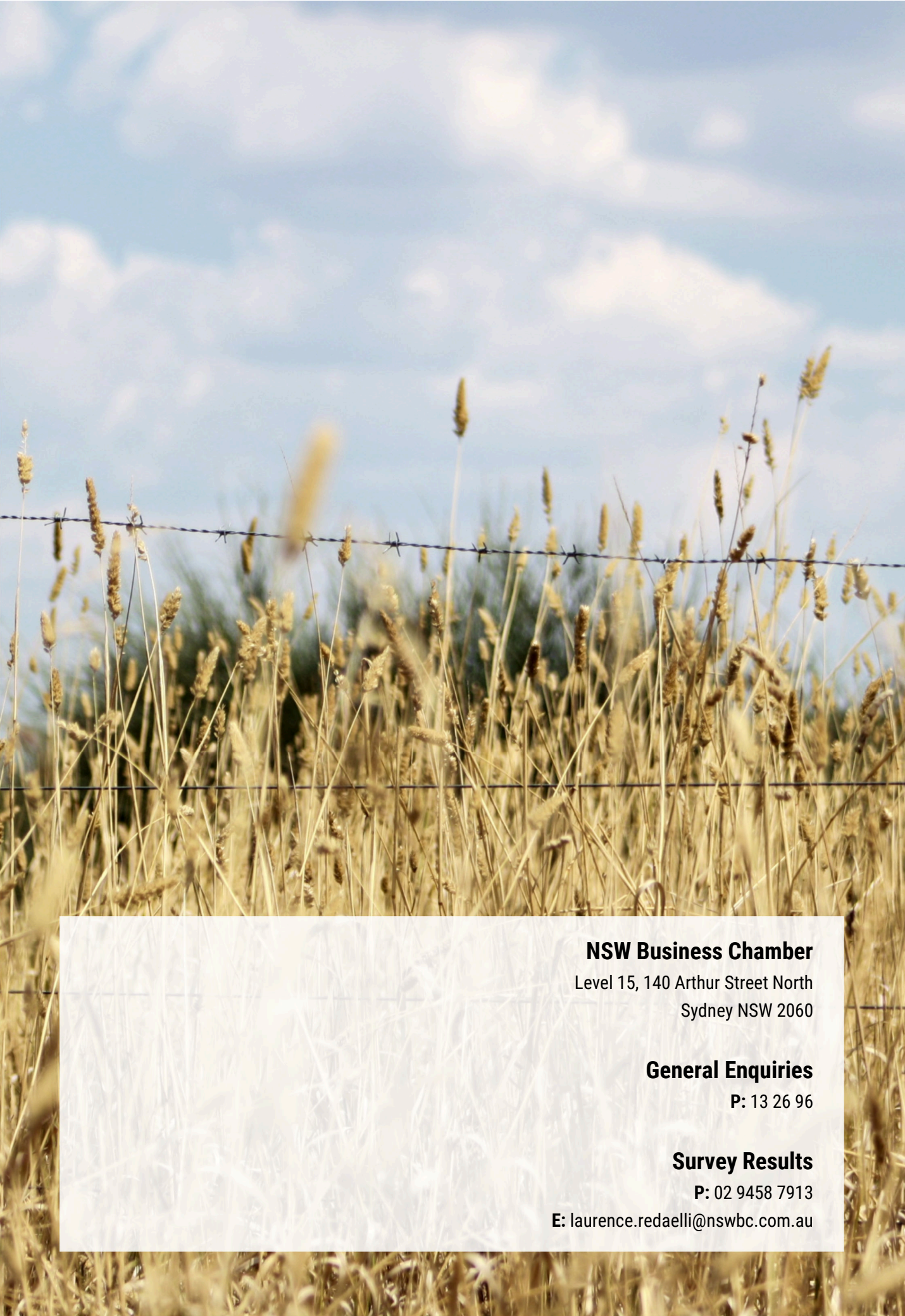
Industry	n	Percentage
Accommodation and Food services	88	9.2%
Agriculture, Forestry and Fishing	236	24.8%
Construction	42	4.4%
Financial and Insurance services	30	3.2%
Manufacturing	62	6.5%
Other business services	88	9.2%
Other industries	226	23.7%
Retail and wholesale trade	180	18.9%

Number of Employees	n	Percentage
Non-employing / Sole Operator	135	14.2%
1 to 4	272	28.6%
5 to 20	337	35.4%
21 to 200	172	18.1%
More than 200	32	3.4%

Note: may not sum to total survey responses where respondent did not indicate region, industry or business size.

SURVEY NOTES

- Smaller sample sizes mean results for individual industries, regions and other categories should be treated with caution.
- Other 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 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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