

REGIONAL RECAP

December 2019



NSW Total 659 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-34.0	15.5%	34.9%	49.5%	-23.9	↓	18.1%	38.5%	43.4%	-25.3
Total Capital Spending	-17.7	22.7%	36.9%	40.4%	-15.0	↓	16.1%	46.2%	37.6%	-21.5
Total Operating Costs	33.9	44.8%	44.4%	10.9%	31.2	↑	35.7%	52.0%	12.2%	23.5
Total Sales Revenue	-25.8	20.7%	32.7%	46.5%	-13.8	↓	22.5%	36.5%	41.0%	-18.6
Total Profit	-39.9	16.6%	26.9%	56.5%	-29.4	↓	17.6%	35.3%	47.1%	-29.4
Total Staff Numbers	-8.9	14.2%	62.8%	23.1%	-5.2	↓	11.4%	67.5%	21.1%	-9.7

Capital Region 28 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-46.2	11.5%	30.8%	57.7%	-60.7	↑	23.1%	46.2%	30.8%	-7.7
Total Capital Spending	-27.3	18.2%	36.4%	45.5%	-41.7	↑	20.0%	35.0%	45.0%	-25.0
Total Operating Costs	36.4	45.5%	45.5%	9.1%	50.0	↓	45.0%	50.0%	5.0%	40.0
Total Sales Revenue	-45.5	18.2%	18.2%	63.6%	-66.7	↑	20.0%	45.0%	35.0%	-15.0
Total Profit	-52.4	9.5%	28.6%	61.9%	-70.8	↑	21.1%	31.6%	47.4%	-26.3
Total Staff Numbers	-22.7	4.5%	68.2%	27.3%	-20.8	↓	10.5%	73.7%	15.8%	-5.3

Central Coast 34 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-12.9	19.4%	48.4%	32.3%	-17.1	↑	35.5%	45.2%	19.4%	16.1
Total Capital Spending	-3.7	22.2%	51.9%	25.9%	-5.7	↑	24.0%	52.0%	24.0%	0.0
Total Operating Costs	32.1	46.4%	39.3%	14.3%	27.8	↑	25.9%	55.6%	18.5%	7.4
Total Sales Revenue	0.0	28.6%	42.9%	28.6%	2.9	↓	40.7%	44.4%	14.8%	25.9
Total Profit	-10.7	21.4%	46.4%	32.1%	-11.4	↑	33.3%	48.1%	18.5%	14.8
Total Staff Numbers	-7.1	10.7%	71.4%	17.9%	5.7	↓	18.5%	66.7%	14.8%	3.7

Central West 34 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-26.5	20.6%	32.4%	47.1%	-33.3	↑	20.6%	29.4%	50.0%	-29.4
Total Capital Spending	-35.7	10.7%	42.9%	46.4%	-18.5	↓	15.4%	53.8%	30.8%	-15.4
Total Operating Costs	31.0	41.4%	48.3%	10.3%	46.4	↓	46.2%	50.0%	3.8%	42.3
Total Sales Revenue	-24.1	20.7%	34.5%	44.8%	-7.4	↓	23.1%	19.2%	57.7%	-34.6
Total Profit	-34.5	13.8%	37.9%	48.3%	-29.6	↓	19.2%	26.9%	53.8%	-34.6
Total Staff Numbers	3.4	10.3%	82.8%	6.9%	10.7	↓	11.5%	80.8%	7.7%	3.8



KEY BUSINESS CONDITIONS



Coffs Harbour – Grafton 32 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-41.9	9.7%	38.7%	51.6%	-27.6	↓	6.5%	54.8%	38.7%	-32.3
Total Capital Spending	-37.0	7.4%	48.1%	44.4%	-16.7	↓	3.7%	66.7%	29.6%	-25.9
Total Operating Costs	53.6	60.7%	32.1%	7.1%	24.0	↑	28.6%	64.3%	7.1%	21.4
Total Sales Revenue	-42.9	10.7%	35.7%	53.6%	-8.3	↓	3.7%	37.0%	59.3%	-55.6
Total Profit	-60.7	10.7%	17.9%	71.4%	-16.7	↓	7.4%	33.3%	59.3%	-51.9
Total Staff Numbers	-10.7	10.7%	67.9%	21.4%	-11.5	↑	11.1%	66.7%	22.2%	-11.1

Far West and Orana 13 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-46.2	7.7%	38.5%	53.8%	-22.7	↓	15.4%	15.4%	69.2%	-53.8
Total Capital Spending	-16.7	33.3%	16.7%	50.0%	-10.5	↓	16.7%	25.0%	58.3%	-41.7
Total Operating Costs	41.7	50.0%	41.7%	8.3%	26.3	↑	33.3%	58.3%	8.3%	25.0
Total Sales Revenue	-41.7	16.7%	25.0%	58.3%	-45.0	↑	8.3%	16.7%	75.0%	-66.7
Total Profit	-33.3	16.7%	33.3%	50.0%	-22.2	↓	8.3%	16.7%	75.0%	-66.7
Total Staff Numbers	-16.7	0.0%	83.3%	16.7%	0.0	↓	0.0%	70.0%	30.0%	-30.0

Hunter Valley exc. Newcastle 24 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-43.5	17.4%	21.7%	60.9%	-4.7	↓	21.7%	52.2%	26.1%	-4.3
Total Capital Spending	-11.1	27.8%	33.3%	38.9%	-11.8	↑	6.7%	46.7%	46.7%	-40.0
Total Operating Costs	11.1	38.9%	33.3%	27.8%	40.0	↓	35.7%	50.0%	14.3%	21.4
Total Sales Revenue	-33.3	22.2%	22.2%	55.6%	-2.9	↓	20.0%	33.3%	46.7%	-26.7
Total Profit	-50.0	11.1%	27.8%	61.1%	-22.9	↓	6.7%	33.3%	60.0%	-53.3
Total Staff Numbers	-11.1	16.7%	55.6%	27.8%	-2.9	↓	14.3%	64.3%	21.4%	-7.1

Illawarra 32 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-38.7	16.1%	29.0%	54.8%	-28.6	↓	25.8%	32.3%	41.9%	-16.1
Total Capital Spending	-17.4	21.7%	39.1%	39.1%	-13.2	↓	12.5%	54.2%	33.3%	-20.8
Total Operating Costs	45.8	50.0%	45.8%	4.2%	13.2	↑	50.0%	37.5%	12.5%	37.5
Total Sales Revenue	4.2	33.3%	37.5%	29.2%	10.5	↓	30.4%	39.1%	30.4%	0.0
Total Profit	-8.3	29.2%	33.3%	37.5%	-5.1	↓	16.7%	37.5%	45.8%	-29.2
Total Staff Numbers	8.0	16.0%	76.0%	8.0%	-2.6	↑	12.0%	76.0%	12.0%	0.0

Mid North Coast 51 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-30.0	24.0%	22.0%	54.0%	-32.4	↑	24.0%	34.0%	42.0%	-18.0
Total Capital Spending	-2.6	35.9%	25.6%	38.5%	0.0	↓	21.1%	39.5%	39.5%	-18.4
Total Operating Costs	60.0	60.0%	40.0%	0.0%	25.0	↑	47.5%	52.5%	0.0%	47.5
Total Sales Revenue	-15.0	27.5%	30.0%	42.5%	-32.1	↑	30.0%	40.0%	30.0%	0.0
Total Profit	-20.0	27.5%	25.0%	47.5%	-44.4	↑	25.0%	35.0%	40.0%	-15.0
Total Staff Numbers	-7.7	17.9%	56.4%	25.6%	-10.7	↑	20.5%	56.4%	23.1%	-2.6

Murray 47 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-40.0	13.3%	33.3%	53.3%	-25.0	↓	11.1%	40.0%	48.9%	-37.8
Total Capital Spending	-35.1	13.5%	37.8%	48.6%	-31.8	↓	16.7%	33.3%	50.0%	-33.3
Total Operating Costs	30.8	35.9%	59.0%	5.1%	25.0	↑	29.7%	62.2%	8.1%	21.6
Total Sales Revenue	-41.0	15.4%	28.2%	56.4%	-37.2	↓	16.2%	37.8%	45.9%	-29.7
Total Profit	-50.0	13.2%	23.7%	63.2%	-50.0	↓	11.1%	36.1%	52.8%	-41.7
Total Staff Numbers	-23.7	5.3%	65.8%	28.9%	-15.9	↓	2.6%	76.3%	21.1%	-18.4

New England and North West 46 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-61.9	7.1%	23.8%	69.0%	-52.9	↓	9.5%	31.0%	59.5%	-50.0
Total Capital Spending	-55.9	5.9%	32.4%	61.8%	-57.8	↑	6.1%	33.3%	60.6%	-54.5
Total Operating Costs	32.4	38.2%	55.9%	5.9%	18.8	↑	39.4%	48.5%	12.1%	27.3
Total Sales Revenue	-54.3	8.6%	28.6%	62.9%	-52.1	↓	12.1%	24.2%	63.6%	-51.5
Total Profit	-70.6	2.9%	23.5%	73.5%	-64.6	↓	15.6%	15.6%	68.8%	-53.1
Total Staff Numbers	-41.2	0.0%	58.8%	41.2%	-22.9	↓	0.0%	68.8%	31.3%	-31.3

Newcastle and Lake Macquarie 39 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	0.0	29.7%	40.5%	29.7%	-8.3	↑	21.6%	40.5%	37.8%	-16.2
Total Capital Spending	-9.4	25.0%	40.6%	34.4%	1.9	↓	22.6%	35.5%	41.9%	-19.4
Total Operating Costs	18.2	30.3%	57.6%	12.1%	35.2	↓	21.9%	62.5%	15.6%	6.3
Total Sales Revenue	-12.1	27.3%	33.3%	39.4%	7.4	↓	28.1%	40.6%	31.3%	-3.1
Total Profit	-18.2	27.3%	27.3%	45.5%	0.0	↓	25.0%	34.4%	40.6%	-15.6
Total Staff Numbers	-6.1	18.2%	57.6%	24.2%	1.8	↓	9.4%	65.6%	25.0%	-15.6

Richmond - Tweed 47 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-43.2	6.8%	43.2%	50.0%	-14.9	↓	2.3%	40.9%	56.8%	-54.5
Total Capital Spending	5.1	38.5%	28.2%	33.3%	5.3	↓	17.1%	45.7%	37.1%	-20.0
Total Operating Costs	25.6	43.6%	38.5%	17.9%	38.5	↓	28.9%	44.7%	26.3%	2.6
Total Sales Revenue	-15.4	23.1%	38.5%	38.5%	5.3	↓	23.7%	36.8%	39.5%	-15.8
Total Profit	-41.0	15.4%	28.2%	56.4%	-28.9	↓	13.2%	39.5%	47.4%	-34.2
Total Staff Numbers	0.0	21.1%	57.9%	21.1%	12.8	↓	10.5%	71.1%	18.4%	-7.9

Riverina 31 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-29.6	11.1%	48.1%	40.7%	-22.9	↓	25.9%	29.6%	44.4%	-18.5
Total Capital Spending	3.8	34.6%	34.6%	30.8%	-26.7	↑	29.2%	50.0%	20.8%	8.3
Total Operating Costs	42.3	50.0%	42.3%	7.7%	26.7	↑	29.2%	58.3%	12.5%	16.7
Total Sales Revenue	-19.2	23.1%	34.6%	42.3%	-6.7	↓	20.8%	45.8%	33.3%	-12.5
Total Profit	-34.6	19.2%	26.9%	53.8%	-33.3	↓	29.2%	33.3%	37.5%	-8.3
Total Staff Numbers	12.0	36.0%	40.0%	24.0%	-6.7	↑	30.4%	56.5%	13.0%	17.4

Southern Highlands & Shoalhaven 16 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-73.3	0.0%	26.7%	73.3%	-48.3	↓	20.0%	26.7%	53.3%	-33.3
Total Capital Spending	-16.7	25.0%	33.3%	41.7%	-13.0	↓	15.4%	30.8%	53.8%	-38.5
Total Operating Costs	61.5	61.5%	38.5%	0.0%	50.0	↑	61.5%	38.5%	0.0%	61.5
Total Sales Revenue	-38.5	15.4%	30.8%	53.8%	-29.2	↓	7.7%	30.8%	61.5%	-53.8
Total Profit	-53.8	7.7%	30.8%	61.5%	-56.5	↑	7.7%	30.8%	61.5%	-53.8
Total Staff Numbers	-7.7	15.4%	61.5%	23.1%	-26.1	↑	7.7%	69.2%	23.1%	-15.4

Sydney 174 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-29.1	16.4%	38.2%	45.5%	-15.9	↓	19.4%	37.6%	43.0%	-23.6
Total Capital Spending	-14.6	23.4%	38.7%	38.0%	-10.4	↓	16.2%	53.7%	30.1%	-14.0
Total Operating Costs	24.6	40.8%	43.0%	16.2%	31.2	↓	33.6%	51.4%	15.0%	18.6
Total Sales Revenue	-26.1	20.4%	33.1%	46.5%	-7.1	↓	25.4%	37.7%	37.0%	-11.6
Total Profit	-45.4	16.3%	22.0%	61.7%	-23.6	↓	16.7%	40.6%	42.8%	-26.1
Total Staff Numbers	-7.9	16.4%	59.3%	24.3%	-4.0	↓	10.9%	65.0%	24.1%	-13.1



PRIORITIES & THE BUSINESS ENVIRONMENT

How have the following priorities changed over the period between October 2019 to December 2019?

Index*	Total NSW DEC19	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
Expanding the capacity of my business to meet demand	2.7	2.8	43.5	-13.3	18.8	21.7	-44.4	-36.4	13.0	7.9	-19.4	-11.1	16.0	19.4	5.9	-37.5
Downsizing my business	-1.5	-5.8	-10.5	0.0	-23.1	14.3	50.0	-9.1	-23.5	6.9	7.1	4.3	-5.6	4.3	-23.1	22.2
Hiring people with the right skills/capabilities	41.1	35.0	45.8	42.9	43.8	60.9	33.3	18.2	35.3	45.9	43.3	13.0	50.0	72.4	50.0	-11.1
Growing revenue	77.4	81.9	79.2	84.6	77.3	80.0	100.0	76.9	85.7	69.2	74.2	83.3	80.0	69.0	55.0	80.0
Reducing business costs	71.0	64.5	62.5	81.3	78.9	84.6	100.0	84.6	57.1	73.7	73.5	82.8	63.6	63.3	66.7	90.0

*Index scores calculated as the percentage of respondents indicating the priority was more important minus those indicating the priority was less important. A positive number implies a priority is becoming more important whereas a negative number implies a priority is becoming less important.

How have the following factors changed over the period between October 2019 to December 2019?

Index*	Total NSW DEC19	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
Access to finance	-21.7	-17.0	-13.3	-16.7	-31.3	-31.8	-66.7	-45.5	-22.2	-13.8	-26.1	-12.5	-4.5	-29.6	-21.4	-37.5
Weather-related events (e.g. drought, floods, bushfires)	-60.1	-53.3	-15.8	-61.5	-59.1	-80.0	-75.0	-45.5	-41.2	-64.1	-69.0	-71.4	-35.0	-75.0	-83.3	-85.7
Business solvency (is my business staying afloat)	-4.3	0.9	18.2	-8.3	0.0	-15.4	-14.3	-25.0	5.3	0.0	3.3	-12.5	-5.6	-14.8	-5.0	-40.0
Regulatory environment (cost of red tape)	-37.3	-34.5	-18.2	-40.0	-10.0	-16.7	-63.6	-36.4	-20.0	-11.6	-35.1	-31.3	-19.0	-32.4	-10.5	-22.2

*Index scores calculated as the percentage of respondents indicating the factor was more favourable minus those indicating the factor was less favourable. A positive number implies an improvement whereas a negative number implies a deterioration.

Cost Index*	ALL REGIONS DEC 19	Sydney	Capital Region	Central Coast	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
Wages and Benefits	42.0	42.2	60.0	21.7	42.9	53.8	75.0	66.7	26.3	34.2	51.7	45.8	30.8	37.9	23.5	50.0
Other Staffing-related Costs	38.8	42.9	40.0	21.7	27.8	44.0	75.0	58.3	11.1	32.4	48.3	47.8	13.6	37.9	35.3	50.0
Energy (Gas / Electricity)	43.7	39.4	57.1	45.5	55.6	44.0	66.7	66.7	45.0	40.5	57.1	42.9	27.3	50.0	16.7	44.4
Equipment	30.1	26.3	42.9	26.1	44.4	20.0	50.0	45.5	26.3	26.3	50.0	33.3	10.0	44.8	18.8	55.6
Distribution / Transport Costs	45.0	44.6	33.3	31.8	35.3	43.5	57.1	41.7	38.9	44.1	69.0	44.0	26.7	56.0	53.3	55.6
Real Estate (Rent / Mortgage)	29.5	25.8	-16.7	19.0	30.8	39.1	57.1	41.7	31.3	28.6	35.7	34.8	19.0	40.0	23.1	28.6
Government Taxes / Levies / Fees	39.0	28.9	53.8	30.4	40.0	36.0	75.0	83.3	36.8	32.4	56.7	53.6	22.7	38.7	29.4	50.0
Cost of Inputs (Goods Sold, Imports)	45.4	37.5	76.9	45.5	45.0	54.2	33.3	33.3	47.4	44.1	42.9	57.1	40.0	57.7	29.4	50.0
Finance Costs (Interest / Fees)	11.7	20.0	7.7	10.0	-5.9	4.8	50.0	30.0	5.9	-11.8	7.7	18.5	15.0	14.8	5.6	12.5
Professional Services (Accountants, Legal)	33.7	28.3	42.9	22.7	27.8	28.0	88.9	50.0	30.0	18.9	40.0	28.6	50.0	33.3	38.9	50.0
Marketing / Advertising	34.9	26.0	35.7	21.7	44.4	32.0	88.9	33.3	31.6	23.7	42.9	48.1	54.5	38.5	43.8	28.6
Insurance	54.8	47.1	78.6	54.2	50.0	57.7	66.7	58.3	35.0	50.0	65.5	66.7	45.5	56.7	58.8	87.5
Repairs and Maintenance	39.2	26.3	75.0	34.8	36.8	48.0	55.6	50.0	38.9	37.8	50.0	60.7	25.0	27.6	47.4	55.6
Telecommunications	23.0	11.5	26.7	8.7	10.5	8.0	77.8	50.0	25.0	23.7	34.4	37.0	4.8	43.8	0.0	50.0

*Index scores calculated as the percentage of respondents indicating the cost was less affordable minus those indicating the cost was more affordable. A positive number implies increasing cost pressures whereas a negative number implies falling costs.

	Previous September 2019*		Current December 2019			Previous September 2019*		Current December 2019	
Region	Yes	No	Yes	No	Region	Yes	No	Yes	No
Sydney	43.3%	56.7%	45.8%	54.2%	Mid North Coast	37.0%	63.0%	41.7%	58.3%
Central Coast	36.7%	63.3%	43.5%	56.5%	Murray	35.0%	65.0%	53.1%	46.9%
Capital Region	47.6%	52.4%	56.3%	43.8%	New England and North West	34.8%	65.2%	39.3%	60.7%
Central West	55.6%	44.4%	45.5%	54.5%	Newcastle and Lake Macquarie	28.9%	71.1%	48.1%	51.9%
Coffs Harbour - Grafton	45.8%	54.2%	41.7%	58.3%	Richmond - Tweed	61.3%	38.7%	60.7%	39.3%
Far West and Orana	60.0%	40.0%	85.7%	14.3%	Riverina	64.3%	35.7%	57.9%	42.1%
Hunter Valley exc Newcastle	48.3%	51.7%	40.0%	60.0%	Southern Highlands and Shoalhaven	56.5%	43.5%	70.0%	30.0%
Illawarra	24.2%	75.8%	28.6%	71.4%	Total NSW	43.6%	56.4%	47.6%	52.4%

*September survey asked "Do you have suitably skilled staff?".

What capabilities are in demand in your business or industry?

Response	All Regions SEP 19	All Regions DEC 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	32.1%	39.2%	32.0%	29.2%	41.2%	59.1%	50.0%	37.5%	41.7%	39.1%	40.0%	35.3%	53.3%	48.1%	38.7%	47.6%	20.0%
Team Work	29.9%	41.6%	28.9%	50.0%	35.3%	31.8%	65.4%	50.0%	25.0%	39.1%	42.5%	55.9%	40.0%	51.9%	48.4%	57.1%	60.0%
Literacy/Numeracy	9.1%	4.4%	5.5%	4.2%	11.8%	4.5%	3.8%	12.5%	16.7%	0.0%	2.5%	2.9%	3.3%	0.0%	3.2%	0.0%	10.0%
Problem Solving	33.8%	36.6%	44.5%	37.5%	41.2%	27.3%	30.8%	25.0%	16.7%	34.8%	37.5%	35.3%	26.7%	44.4%	32.3%	28.6%	50.0%
Initiative and Enterprise	24.5%	26.6%	25.0%	29.2%	35.3%	36.4%	34.6%	50.0%	33.3%	21.7%	17.5%	11.8%	26.7%	18.5%	29.0%	33.3%	20.0%
Planning and Organising	32.7%	36.4%	32.0%	41.7%	41.2%	45.5%	38.5%	37.5%	41.7%	43.5%	40.0%	38.2%	46.7%	33.3%	38.7%	23.8%	20.0%
Self-Management	27.7%	27.7%	23.4%	37.5%	41.2%	22.7%	30.8%	25.0%	33.3%	30.4%	27.5%	35.3%	23.3%	22.2%	29.0%	28.6%	10.0%
Learning	6.0%	4.6%	3.9%	0.0%	5.9%	0.0%	0.0%	12.5%	8.3%	4.3%	7.5%	5.9%	3.3%	7.4%	9.7%	4.8%	0.0%
Technology	23.3%	19.2%	21.1%	12.5%	17.6%	22.7%	3.8%	37.5%	8.3%	26.1%	20.0%	14.7%	20.0%	22.2%	16.1%	28.6%	30.0%
Leadership	18.2%	17.9%	22.7%	20.8%	5.9%	22.7%	7.7%	12.5%	0.0%	13.0%	35.0%	8.8%	13.3%	18.5%	19.4%	14.3%	10.0%
Creativity	14.5%	15.5%	18.8%	12.5%	11.8%	13.6%	7.7%	0.0%	41.7%	13.0%	10.0%	11.8%	30.0%	11.1%	19.4%	9.5%	10.0%

Region	Percentage
Capital Region	4.2%
Central Coast	5.2%
Central West	5.2%
Coffs Harbour - Grafton	4.9%
Far West and Orana	2.0%
Hunter Valley exc Newcastle	3.6%
Illawarra	4.9%
Mid North Coast	7.7%
Murray	7.1%
New England and North West	7.0%
Newcastle and Lake Macquarie	5.9%
Richmond - Tweed	7.1%
Riverina	4.7%
Southern Highlands and Shoalhaven	2.4%
Sydney	26.4%

Industry	Percentage
Primary	5.6%
Population Serving	45.5%
Knowledge Intensive	20.6%
Industrial	19.9%
Health and Education	8.5%

Number of Employees	Percentage
More than 200	6.1%
21 to 200	24.9%
5 to 20	38.3%
1 to 4	21.6%
Non-employing / Sole Operator	9.1%

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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