



# Industry Recap

March 2020

**BUSINESS  
NSW**

# Key Business Conditions

NSW Total 1804 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-34.7	18.2%	28.9%	52.9%	-34.0	↓	4.7%	8.2%	87.1%	-82.4
Total Capital Spending	-32.3	14.5%	38.8%	46.7%	-17.7	↓	9.3%	21.9%	68.8%	-59.4
Total Operating Costs	10.8	26.2%	58.4%	15.4%	33.9	↓	22.3%	50.6%	27.1%	-4.8
Total Sales Revenue	-46.4	15.0%	23.7%	61.3%	-25.8	↓	5.5%	11.9%	82.7%	-77.2
Total Profit	-53.8	13.1%	20.0%	66.9%	-39.9	↓	4.2%	10.8%	85.0%	-80.8
Total Staff Numbers	-18.9	7.9%	65.2%	26.9%	-8.9	↓	3.0%	49.8%	47.2%	-44.3

## Industry Categories

Primary 54 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-34.0	26.0%	14.0%	60.0%	-44.1	↑	10.0%	12.0%	78.0%	-68.0
Total Capital Spending	-27.9	20.9%	30.2%	48.8%	-43.8	↑	17.1%	24.4%	58.5%	-41.5
Total Operating Costs	13.0	34.8%	43.5%	21.7%	34.4	↓	25.6%	51.2%	23.3%	2.3
Total Sales Revenue	-31.1	24.4%	20.0%	55.6%	-50.0	↑	12.5%	20.0%	67.5%	-55.0
Total Profit	-37.8	22.2%	17.8%	60.0%	-50.0	↑	7.3%	22.0%	70.7%	-63.4
Total Staff Numbers	-15.9	4.5%	75.0%	20.5%	-30.0	↑	4.9%	65.9%	29.3%	-24.4

Population Serving 847 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-45.5	15.9%	22.6%	61.5%	-43.5	↓	3.4%	5.9%	90.7%	-87.3
Total Capital Spending	-40.2	12.7%	34.4%	52.9%	-18.9	↓	6.5%	18.3%	75.2%	-68.7
Total Operating Costs	7.0	24.7%	57.6%	17.7%	36.7	↓	20.9%	51.0%	28.1%	-7.2
Total Sales Revenue	-59.5	10.9%	18.8%	70.3%	-30.6	↓	3.6%	6.6%	89.8%	-86.1
Total Profit	-63.4	10.3%	16.0%	73.7%	-42.2	↓	3.2%	5.4%	91.4%	-88.2
Total Staff Numbers	-27.7	4.9%	62.6%	32.5%	-12.7	↓	1.7%	41.6%	56.7%	-55.1

Knowledge Intensive 473 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-23.5	20.3%	36.0%	43.7%	-18.2	↓	5.3%	9.6%	85.2%	-79.9
Total Capital Spending	-25.5	13.2%	48.1%	38.7%	-13.0	↓	11.9%	24.9%	63.2%	-51.3
Total Operating Costs	11.8	24.3%	63.1%	12.6%	22.4	↓	20.9%	52.5%	26.5%	-5.6
Total Sales Revenue	-35.3	18.6%	27.5%	53.9%	-16.2	↓	8.1%	15.7%	76.2%	-68.1
Total Profit	-41.6	16.9%	24.7%	58.4%	-31.6	↓	5.9%	16.0%	78.1%	-72.2
Total Staff Numbers	-12.8	8.8%	69.5%	21.7%	2.6	↓	3.4%	59.3%	37.2%	-33.8

# Key Business Conditions

Industrial 264 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-23.3	20.1%	36.5%	43.4%	-30.5	↑	8.8%	10.0%	81.1%	-72.3
Total Capital Spending	-31.2	16.3%	36.1%	47.5%	-22.9	↓	10.1%	26.5%	63.5%	-53.4
Total Operating Costs	13.9	28.2%	57.4%	14.4%	38.6	↓	25.2%	48.0%	26.7%	-1.5
Total Sales Revenue	-37.0	17.8%	27.4%	54.8%	-21.9	↓	6.1%	18.8%	75.1%	-69.0
Total Profit	-52.9	12.1%	22.8%	65.0%	-41.2	↓	4.6%	16.8%	78.6%	-74.0
Total Staff Numbers	-17.5	10.5%	61.5%	28.0%	-10.6	↓	3.7%	50.5%	45.7%	-42.0

Health and Education 166 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-30.5	18.2%	33.1%	48.7%	-25.0	↓	1.3%	11.7%	87.0%	-85.7
Total Capital Spending	-13.8	22.4%	41.4%	36.2%	9.5	↓	13.1%	23.4%	63.6%	-50.5
Total Operating Costs	22.1	33.6%	54.9%	11.5%	37.2	↓	27.9%	46.8%	25.2%	2.7
Total Sales Revenue	-31.1	17.6%	33.6%	48.7%	-18.6	↓	3.6%	14.5%	81.8%	-78.2
Total Profit	-47.4	14.7%	23.3%	62.1%	-39.5	↓	2.7%	9.1%	88.2%	-85.5
Total Staff Numbers	5.0	18.3%	68.3%	13.3%	0.0	↑	6.9%	57.8%	35.3%	-28.4

## Industries

Accomm. & Food Services 192 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-58.8	13.0%	15.3%	71.8%	-49.4	↓	1.1%	2.8%	96.0%	-94.9
Total Capital Spending	-46.8	13.5%	26.2%	60.3%	-13.8	↓	3.7%	12.5%	83.8%	-80.1
Total Operating Costs	7.5	27.9%	51.7%	20.4%	52.2	↓	22.9%	40.0%	37.1%	-14.3
Total Sales Revenue	-71.9	8.9%	10.3%	80.8%	-42.6	↓	1.4%	0.7%	97.9%	-96.5
Total Profit	-74.3	7.6%	10.4%	81.9%	-52.2	↓	0.0%	1.4%	98.6%	-98.6
Total Staff Numbers	-39.3	3.6%	53.6%	42.9%	-9.0	↓	0.8%	28.2%	71.0%	-70.2

Construction 64 Respondents		Current					Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-47.5	11.9%	28.8%	59.3%	0.0	↓	5.1%	6.8%	88.1%	-83.1
Total Capital Spending	-39.2	3.9%	52.9%	43.1%	-5.9	↓	4.2%	31.3%	64.6%	-60.4
Total Operating Costs	-8.0	16.0%	60.0%	24.0%	5.9	↓	20.4%	53.1%	26.5%	-6.1
Total Sales Revenue	-44.9	12.2%	30.6%	57.1%	-5.9	↓	4.2%	12.5%	83.3%	-79.2
Total Profit	-47.9	16.7%	18.8%	64.6%	-18.8	↓	8.7%	4.3%	87.0%	-78.3
Total Staff Numbers	-16.3	10.2%	63.3%	26.5%	-29.4	↑	6.7%	42.2%	51.1%	-44.4

# Key Business Conditions

Financial & Insurance Services 20 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-15.8	10.5%	63.2%	26.3%	-25.7	↑	15.8%	31.6%	52.6%	-36.8
Total Capital Spending	-5.9	17.6%	58.8%	23.5%	-16.0	↑	23.5%	41.2%	35.3%	-11.8
Total Operating Costs	58.8	58.8%	41.2%	0.0%	32.1	↑	47.1%	41.2%	11.8%	35.3
Total Sales Revenue	5.9	35.3%	35.3%	29.4%	10.7	↓	29.4%	41.2%	29.4%	0.0
Total Profit	-23.5	23.5%	29.4%	47.1%	-14.3	↓	11.8%	41.2%	47.1%	-35.3
Total Staff Numbers	0.0	23.5%	52.9%	23.5%	-13.8	↑	17.6%	58.8%	23.5%	-5.9

Manufacturing 86 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-34.5	14.3%	36.9%	48.8%	-11.6	↓	19.0%	41.7%	39.3%	-20.2
Total Capital Spending	-30.1	16.4%	37.0%	46.6%	-5.3	↓	12.9%	38.6%	48.6%	-35.7
Total Operating Costs	31.2	42.9%	45.5%	11.7%	44.1	↓	39.2%	48.6%	12.2%	27.0
Total Sales Revenue	-26.0	24.7%	24.7%	50.6%	-12.3	↓	19.2%	41.1%	39.7%	-20.5
Total Profit	-44.2	19.5%	16.9%	63.6%	-34.5	↓	16.4%	35.6%	47.9%	-31.5
Total Staff Numbers	-14.3	14.3%	57.1%	28.6%	5.0	↓	8.2%	64.4%	27.4%	-19.2

Business Services 398 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-24.7	20.1%	35.1%	44.8%	-20.0	↓	5.7%	8.7%	85.6%	-79.9
Total Capital Spending	-25.8	13.9%	46.4%	39.7%	-17.8	↓	12.3%	24.6%	63.1%	-50.9
Total Operating Costs	9.6	21.8%	66.0%	12.2%	14.3	↓	18.5%	54.4%	27.2%	-8.7
Total Sales Revenue	-36.3	18.6%	26.4%	55.0%	-20.7	↓	7.4%	15.2%	77.4%	-70.0
Total Profit	-40.4	17.3%	25.0%	57.7%	-35.9	↓	5.4%	15.5%	79.1%	-73.7
Total Staff Numbers	-12.8	9.0%	69.2%	21.8%	3.3	↓	4.1%	57.9%	38.0%	-33.9

Retail & Wholesale Trade 292 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	-42.1	18.8%	20.3%	60.9%	-63.8	↑	5.6%	6.8%	87.6%	-82.0
Total Capital Spending	-40.7	14.4%	30.6%	55.0%	-45.7	↑	7.8%	22.0%	70.2%	-62.4
Total Operating Costs	9.9	26.9%	56.1%	17.0%	30.0	↓	24.3%	55.0%	20.6%	3.7
Total Sales Revenue	-57.0	10.4%	22.2%	67.4%	-54.1	↓	5.1%	9.3%	85.6%	-80.5
Total Profit	-63.5	8.6%	19.4%	72.1%	-64.8	↑	4.2%	9.3%	86.4%	-82.2
Total Staff Numbers	-26.8	4.2%	64.8%	31.0%	-26.2	↓	3.5%	45.2%	51.3%	-47.7

Other Industries 223 Respondents	Current						Expected			
Indicator	Index	Up	Same	Down	Previous	↑ or ↓	Up	Same	Down	Index
Performance of the NSW Economy	<b>-31.6</b>	15.0%	38.3%	46.6%	-9.9	↓	17.7%	37.9%	44.3%	-26.6
Total Capital Spending	<b>-14.5</b>	25.9%	33.7%	40.4%	-6.7	↓	17.4%	41.9%	40.6%	-23.2
Total Operating Costs	<b>34.1</b>	42.4%	49.4%	8.2%	35.1	↓	31.0%	55.7%	13.3%	17.7
Total Sales Revenue	<b>-26.0</b>	18.9%	36.1%	45.0%	0.4	↓	21.0%	36.9%	42.0%	-21.0
Total Profit	<b>-37.3</b>	16.0%	30.8%	53.3%	-19.6	↓	17.7%	35.4%	46.8%	-29.1
Total Staff Numbers	<b>-8.3</b>	15.5%	60.7%	23.8%	2.9	↓	13.1%	66.7%	20.3%	-7.2

# Priorities and the Business Environment

## How have the following priorities changed over the past three months?

Response	ALL INDUSTRIES		Primary		Population Serving		Knowledge Intensive		Industrial		Health and Education	
	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20
Expanding the capacity of my business to meet demand	2.7	<b>-35.1</b>	-8.3	<b>-21.6</b>	4.7	<b>-42.9</b>	14.1	<b>-26.9</b>	-4.4	<b>-32.0</b>	23.5	<b>-23.1</b>
Downsizing my business	-1.5	<b>27.2</b>	15.0	<b>22.6</b>	-1.0	<b>32.1</b>	-17.6	<b>22.7</b>	-2.7	<b>25.2</b>	-17.4	<b>3.5</b>
Hiring people with the right skills/capabilities	41.1	<b>-12.2</b>	27.3	<b>15.6</b>	40.7	<b>-23.7</b>	44.0	<b>-5.0</b>	38.8	<b>-6.9</b>	65.5	<b>7.5</b>
Growing revenue	77.4	<b>57.4</b>	60.0	<b>43.2</b>	83.0	<b>55.6</b>	79.8	<b>52.2</b>	72.3	<b>54.3</b>	72.7	<b>49.0</b>
Reducing business costs	71.0	<b>78.0</b>	60.0	<b>78.9</b>	83.7	<b>84.2</b>	57.1	<b>72.1</b>	68.8	<b>79.3</b>	52.9	<b>72.7</b>

\*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 past three months?

Response	ALL INDUSTRIES		Primary		Population Serving		Knowledge Serving		Industrial		Health and Education	
	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20	Dec 19	Mar 20
Access to finance	-21.7	<b>-17.8</b>	-26.3	<b>-17.6</b>	-27.8	<b>-23.6</b>	-14.9	<b>-16.9</b>	-18.3	<b>-7.7</b>	-14.8	<b>-11.1</b>
Weather-related events (e.g. drought, floods, bushfires)	-60.1	<b>-35.7</b>	-83.3	<b>-2.6</b>	-64.8	<b>-41.4</b>	-50.8	<b>-32.2</b>	-57.8	<b>-34.0</b>	-35.5	<b>-24.7</b>
Business solvency (is my business staying afloat)	-4.3	<b>-30.5</b>	-8.7	<b>-5.4</b>	-8.9	<b>-38.2</b>	0.0	<b>-28.2</b>	-1.2	<b>-18.5</b>	17.9	<b>-25.0</b>
Regulatory environment (cost of red tape)	-37.3	<b>-29.9</b>	-27.3	<b>-18.6</b>	-28.8	<b>-25.9</b>	-26.4	<b>-19.3</b>	-20.8	<b>-11.4</b>	-42.9	<b>-27.2</b>

\*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.

# Business Costs

How have the following costs changed over the past three months?												
Cost	ALL INDUSTRIES		Primary		Population Serving		Knowledge Intensive		Industrial		Health and Education	
	DEC19	MAR20	DEC19	MAR20	DEC19	MAR20	DEC19	MAR20	DEC19	MAR20	DEC19	MAR20
Wages and Benefits	42.0	<b>41.4</b>	60.9	<b>40.0</b>	46.8	<b>48.9</b>	27.4	<b>34.2</b>	43.7	<b>33.7</b>	19.4	<b>37.8</b>
Other Staffing-related Costs	38.8	<b>37.8</b>	47.8	<b>30.3</b>	43.7	<b>44.9</b>	27.7	<b>30.4</b>	40.7	<b>34.1</b>	20.0	<b>38.3</b>
Energy (Gas / Electricity)	43.7	<b>37.5</b>	41.7	<b>28.9</b>	50.4	<b>45.5</b>	42.5	<b>29.8</b>	35.3	<b>32.4</b>	32.3	<b>28.7</b>
Equipment	30.1	<b>29.9</b>	43.5	<b>34.2</b>	38.7	<b>35.1</b>	22.9	<b>23.2</b>	25.6	<b>26.9</b>	13.8	<b>30.7</b>
Distribution / Transport Costs	45.0	<b>35.5</b>	56.5	<b>33.3</b>	40.4	<b>36.9</b>	31.4	<b>23.6</b>	53.6	<b>41.7</b>	29.2	<b>22.5</b>
Real Estate (Rent / Mortgage)	29.5	<b>31.6</b>	33.3	<b>25.0</b>	38.3	<b>35.7</b>	24.0	<b>25.1</b>	21.1	<b>27.5</b>	22.2	<b>27.5</b>
Government Taxes / Levies / Fees	39.0	<b>34.6</b>	44.0	<b>30.8</b>	45.9	<b>43.2</b>	31.4	<b>27.5</b>	34.9	<b>29.2</b>	21.4	<b>22.6</b>
Cost of Inputs (Goods Sold, Imports)	45.4	<b>46.3</b>	70.8	<b>33.3</b>	50.0	<b>48.5</b>	39.2	<b>33.7</b>	46.5	<b>56.1</b>	14.8	<b>27.6</b>
Finance Costs (Interest / Fees)	11.7	<b>14.3</b>	20.0	<b>7.9</b>	17.5	<b>19.3</b>	14.7	<b>12.3</b>	-5.0	<b>3.7</b>	20.0	<b>16.7</b>
Professional Services (Accountants, Legal)	33.7	<b>30.6</b>	34.8	<b>25.6</b>	35.5	<b>33.9</b>	33.3	<b>27.7</b>	22.4	<b>20.1</b>	34.5	<b>29.3</b>
Marketing / Advertising	34.9	<b>33.4</b>	36.4	<b>27.8</b>	42.9	<b>38.8</b>	32.2	<b>29.3</b>	20.0	<b>19.6</b>	25.8	<b>34.0</b>
Insurance	54.8	<b>51.1</b>	75.0	<b>56.4</b>	60.8	<b>55.0</b>	51.7	<b>44.9</b>	47.1	<b>52.8</b>	33.3	<b>36.0</b>
Repairs and Maintenance	39.2	<b>34.9</b>	50.0	<b>38.5</b>	51.2	<b>40.9</b>	25.9	<b>22.1</b>	38.4	<b>32.4</b>	26.7	<b>25.3</b>
Telecomms	23.0	<b>29.9</b>	8.3	<b>26.3</b>	27.3	<b>31.8</b>	24.7	<b>26.3</b>	17.0	<b>13.7</b>	-3.1	<b>28.3</b>

\*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.

# Top Capabilities

What capabilities are in demand in your business or industry?							
Response	ALL INDUSTRIES MAR 20	ALL INDUSTRIES DEC 19	Primary	Population Serving	Knowledge Intensive	Industrial	Health and Education
Communication	57.8%	39.20%	41.7%	57.8%	61.5%	48.8%	68.1%
Team Work	50.8%	41.60%	66.7%	54.1%	33.3%	67.4%	51.4%
Literacy/Numeracy	6.4%	4.40%	4.2%	5.3%	10.8%	1.6%	8.3%
Problem Solving	45.1%	36.60%	45.8%	37.0%	61.0%	45.7%	41.7%
Initiative and Enterprise	28.9%	26.60%	66.7%	27.2%	30.3%	28.7%	22.2%
Planning and Organising	54.9%	36.40%	83.3%	51.4%	48.1%	76.0%	51.4%
Self-Management	40.2%	27.70%	58.3%	42.0%	39.0%	36.4%	33.3%
Learning	7.7%	4.60%	16.7%	4.8%	10.4%	6.2%	16.7%
Technology	29.3%	19.20%	25.0%	20.1%	47.6%	27.9%	30.6%
Leadership	25.5%	17.90%	29.2%	21.5%	24.2%	30.2%	44.4%
Creativity	23.7%	15.50%	16.7%	31.7%	16.9%	14.0%	16.7%

Is your business currently experiencing a skill shortage?*									
	Previous December 2019		Current March 2020			Previous December 2019		Current March 2020	
Industry	Yes	No	Yes	No	Industry	Yes	No	Yes	No
<b>Primary</b>	<b>50.0%</b>	<b>50.0%</b>	<b>48.7%</b>	<b>51.3%</b>	Professional, Scientific & Technical Services	40.4%	59.6%	31.4%	68.6%
Agriculture, Forestry & Fishing	50.0%	50.0%	42.4%	57.6%	Administrative & Support Services	50.0%	50.0%	31.6%	68.4%
Mining	50.0%	50.0%	83.3%	16.7%	Public Administration & Safety	16.7%	83.3%	60.0%	40.0%
<b>Population Serving Industries</b>	<b>47.8%</b>	<b>52.2%</b>	<b>29.3%</b>	<b>70.7%</b>	<b>Industrial</b>	<b>51.0%</b>	<b>49.0%</b>	<b>37.3%</b>	<b>62.7%</b>
Construction	76.9%	23.1%	53.3%	46.7%	Manufacturing	44.1%	48.5%	30.8%	47.9%
Retail Trade	36.8%	63.2%	29.4%	70.6%	Electricity, Gas, Water & Waste	80.0%	20.0%	37.5%	62.5%
Accommodation & Food Services	49.1%	50.9%	23.1%	76.9%	Wholesale Trade	50.0%	50.0%	29.6%	70.4%
Arts & Recreation Services	28.6%	71.4%	17.3%	82.7%	Transport, Postal & Warehousing	66.7%	33.3%	37.5%	62.5%
Other Services	58.1%	41.9%	33.3%	66.7%	<b>Health and Education</b>	<b>54.3%</b>	<b>45.7%</b>	<b>43.2%</b>	<b>56.8%</b>
<b>Knowledge Intensive</b>	<b>40.6%</b>	<b>59.4%</b>	<b>29.5%</b>	<b>70.5%</b>	Education & Training	46.2%	53.8%	30.8%	69.2%
Information Media & Telecommunications	37.5%	62.5%	28.6%	71.4%	Health Care & Social Assistance	59.1%	40.9%	51.8%	48.2%
Financial & Insurance Services	43.8%	56.3%	25.0%	75.0%	<b>All Industries</b>	<b>47.6%</b>	<b>52.4%</b>	<b>32.3%</b>	<b>67.7%</b>
Rental, Hiring & real Estate Services	57.1%	42.9%	19.4%	80.6%					

# Demography

Region	Percentage
Capital Region	6.6%
Central Coast	3.3%
Central West	4.9%
Coffs Harbour - Grafton	3.5%
Far West and Orana	2.4%
Hunter Valley exc Newcastle	5.8%
Illawarra	4.8%
Mid North Coast	4.5%
Murray	5.0%
New England and North West	4.8%
Newcastle and Lake Macquarie	5.7%
Richmond - Tweed	6.2%
Riverina	4.1%
Southern Highlands and Shoalhaven	3.2%
Sydney	35.2%

Industry	Percentage
Primary	3.0%
Population Serving	47.0%
Knowledge Intensive	26.2%
Industrial	14.6%
Health and Education	9.2%

Number of Employees	Percentage
More than 200	6.1%
21 to 200	20.8%
5 to 20	34.5%
1 to 4	25.6%
Non-employing / Sole Operator	13.1%

## 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.
- Individual industries, regions and other categories with small sample sizes should be treated with caution.
- Primary industries include: agriculture, forestry & fishing and mining.
- Population Serving industries include: construction; retail trade; accommodation & food services; arts & recreation services; other services and ownership of dwellings.
- Knowledge Intensive industries include: information media & telecommunications; financial & insurance services; rental, hiring & real estate services; professional, scientific & technical services; administrative & support services and public administration & safety.
- Industrial industries include: manufacturing; electricity, gas, water & waste; wholesale trade and transport, postal & warehousing.
- Health and Education industries include: education & training and healthcare & social assistance.
- Business Services industries include: information media and telecommunications; rental hiring and real estate services; professional, scientific and technical services; and administration and support services.
- Other Industries include: 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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