

# RCSA Web Survey

Round 7 - March 2003



**VALUES BANK**

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# Executive Summary

- Overall, the survey showed an easing optimism for the immediate future
  - Members are:
    - Less confident - 69% agree that business will increase in the next three months, compared to 84% for the last survey. This gives a +8.3% change in the RCSA Member Confidence Score
    - Expect business to increase by 5.4% compared to 7.2% last round
    - Experiencing an increase in their own staff levels since the last survey. Staff turnover remains as high and the growth in staff members is driven by extra recruitment
    - Finding it harder to locate applicants with the right mix of skills and capabilities
  - Members top concerns are similar to last survey. The top three concerns are:
    - Price undercutting in their industry
    - Lack of hiring intentions by clients
    - Maintaining profitability/fee levels
  - In Australia the greatest concerns for the future remain:
    - Legal issues about on-hired staff
    - WorkCover Legislation, replacing unfair dismissal (down 10%)
- The greatest increase in demand for employees will be:
  - Trades and services
  - Logistics and supply
  - Legal
- The greatest decline in demand for employees will be:
  - IT&T
  - Hospitality & travel



# Executive Summary cont'd

- Disability recruitment
  - More than half (57%) have on-hired or recruited a candidate with disabilities
  - More than two thirds understand the implementation of the discrimination act in terms of placement
  - Are slightly positive in their belief that it makes good business sense to recruit or on-hire people with disabilities
  - Most don't believe it is risky to present a candidate with disabilities to a client
- Most believe disability placement could be increased by 5% if:
  - There was assistance to provide workplace modifications
  - Public awareness campaigns were carried out to increase the acceptance of people with disabilities



# Process

- Web survey
  - E-mail business heads in both NZ and Australia
  - 161 responses
  - Data collection began mid March 2003

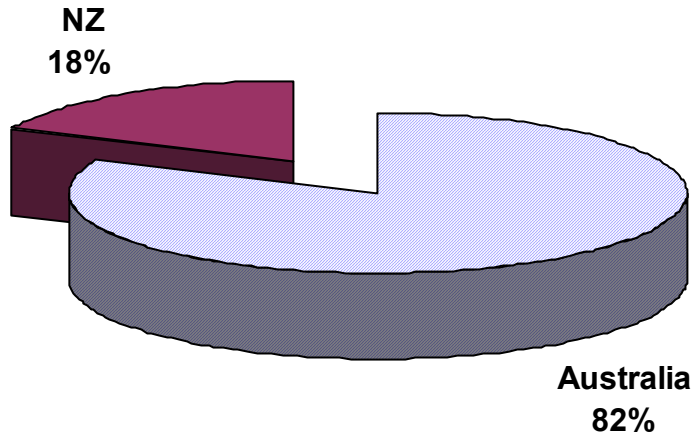


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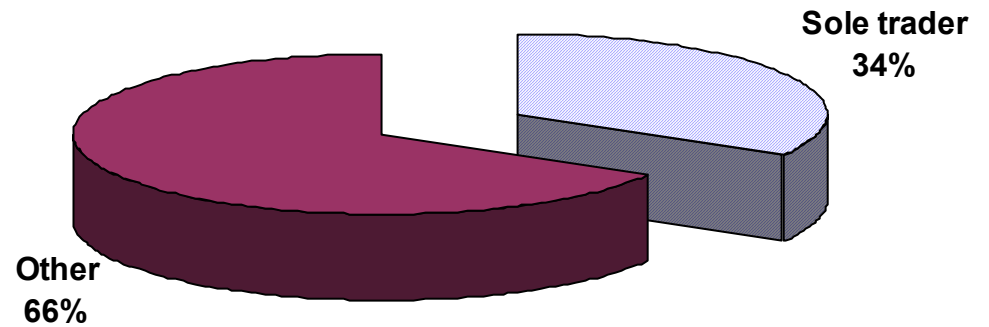
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# Demographics of sample

## Country

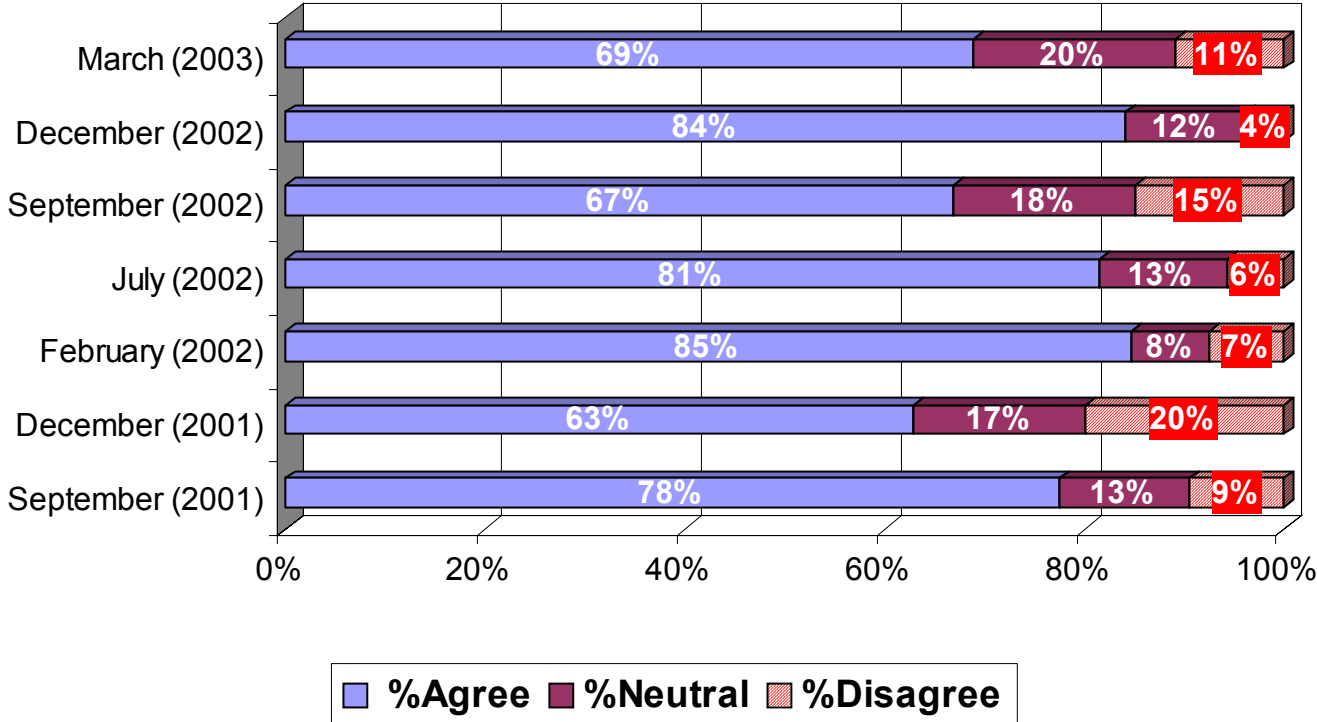


## Trader status



# RCSA members are less confident their business will improve in the next three months.

## Confidence that business will improve in the next 3 months

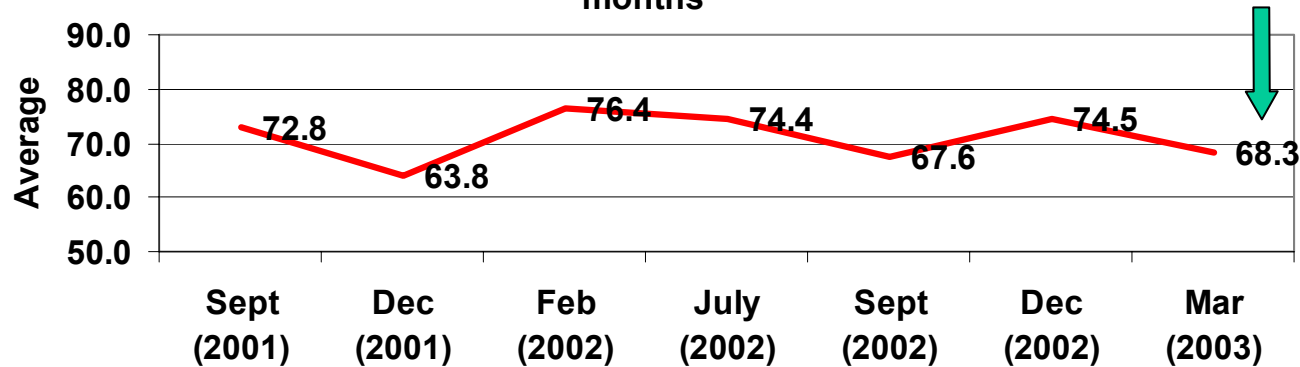


Expected volume of business increase in the next quarter =5.4% down from 7.2% last round

Business confidence has eased since December but remains in the 'zone' between 60 and 80. The expected growth in volume has decreased

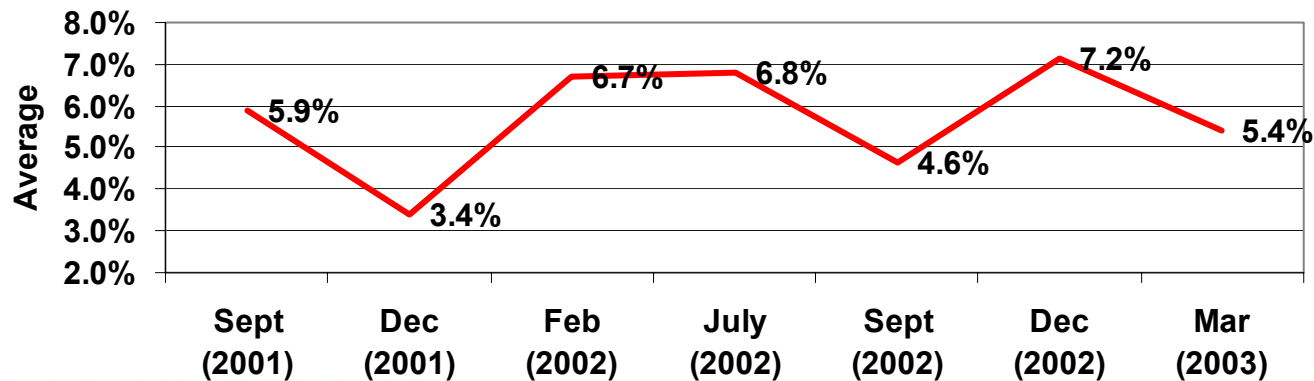
I am confident that our business will improve over the next three months

-6.2 points or -8.3%



Scale:  
0=strongly disagree  
50=neutral  
100=strongly agree

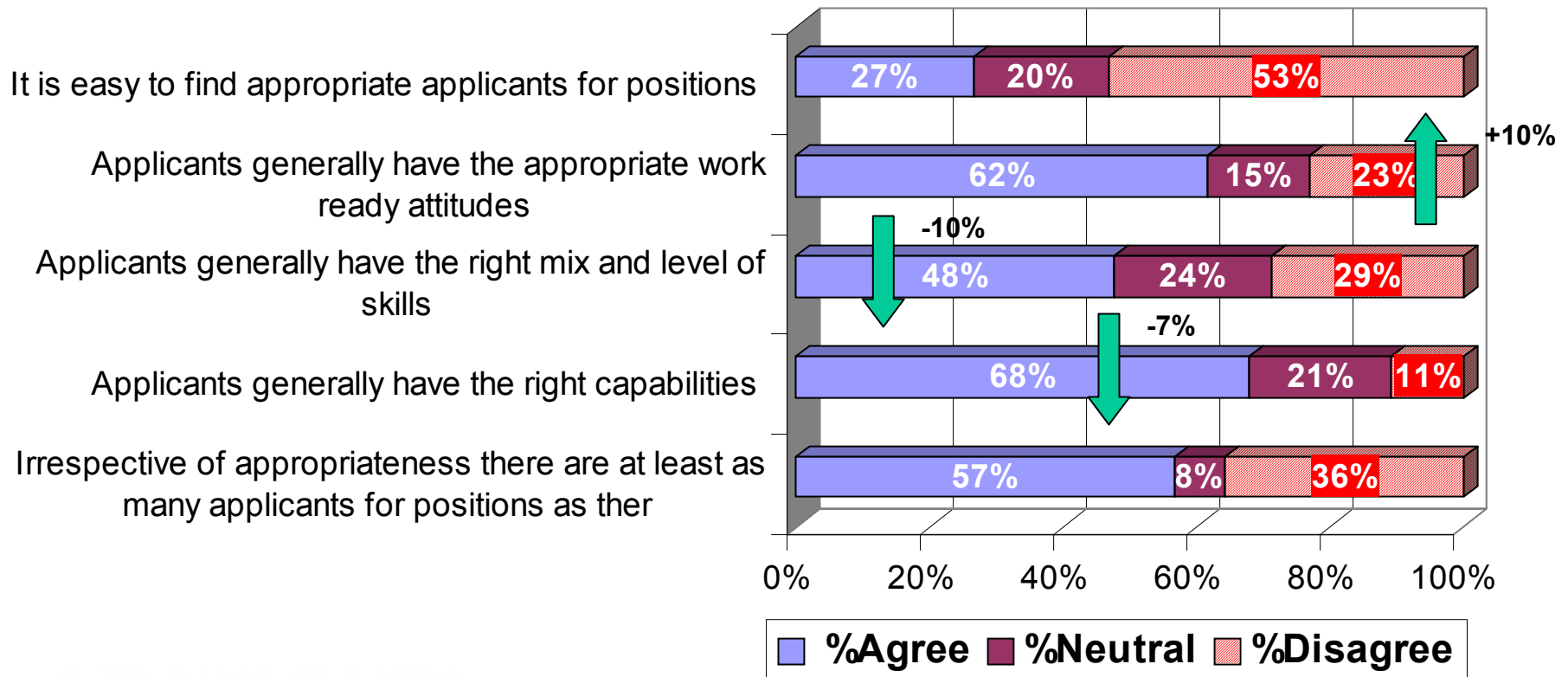
Volume (%) your business will change next quarter



# Confidence in the labour market has eased since the last survey

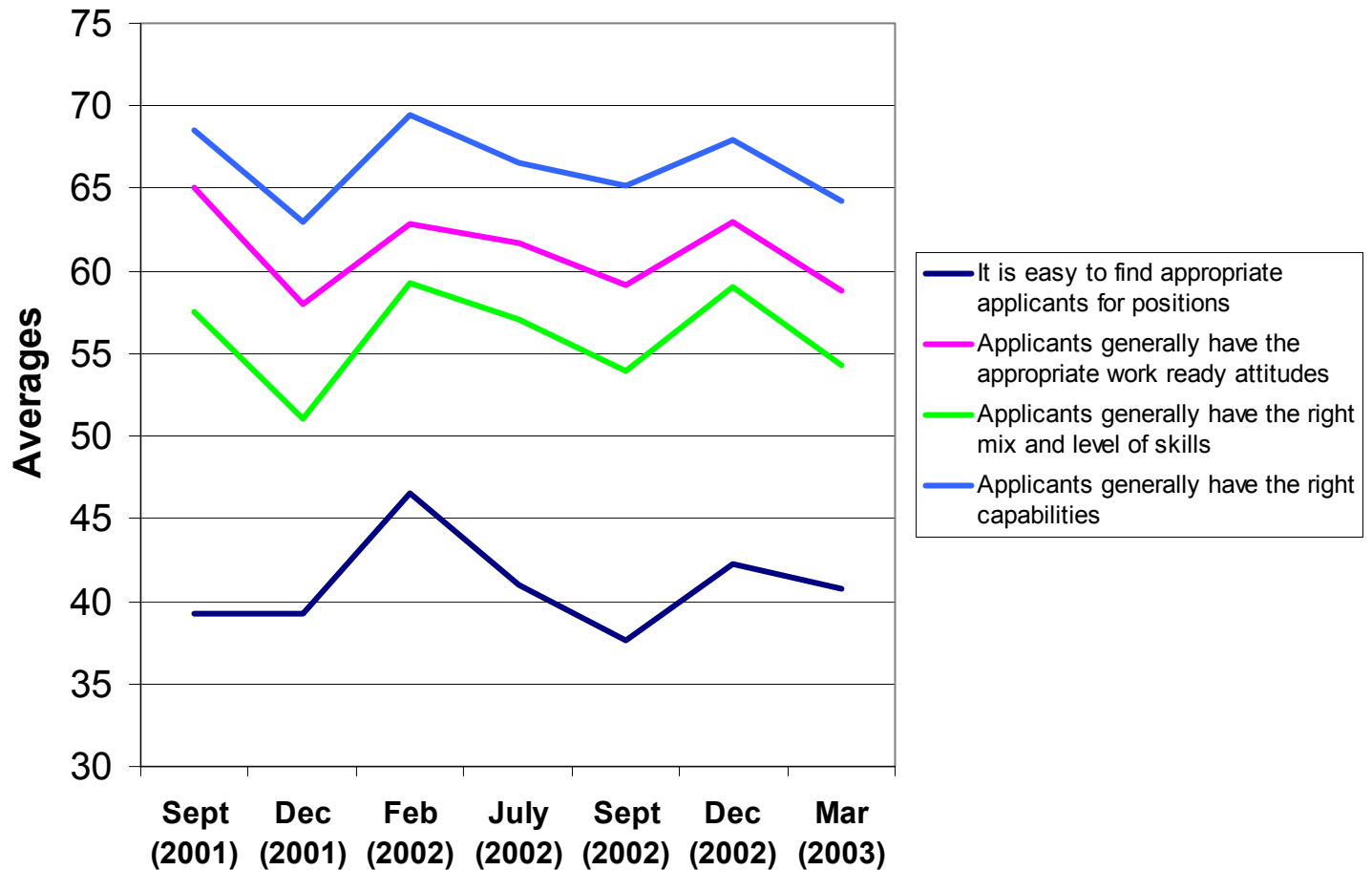
It is becoming harder to find applicants with the right level and mix of skills

## Labour market



# Labour market scores have eased

## Labour market scores



Scale:  
0=strongly disagree  
50=neutral  
100=strongly agree



## RCSA member staff turnover remains high.

There is extreme variability in the rate of staff turnover. RCSA members have lower levels of staff turnover compared to last quarter and are recruiting less

### December 2002

	Mean	Minimum	Maximum
Equivalent full time internal positions in your business (include yourself)	14.26	1	450
Internal employees who left your business in the last six months	1.62	0	22
Staff turnover 6 months - %	18.66	0	300
Internal employees who joined your business in the last six months	3.63	0	200
Staff growth 6 months - %	7.38	-300	750

### March 2003

	Mean	Minimum	Maximum
Equivalent full time internal positions in your business (include yourself)	17.72	1	611
Internal employees who left your business in the last six months	2.02	0	50
Staff turnover 6 months - %	15.77	0	104.55
Internal employees who joined your business in the last six months	2.86	0	121
Staff growth 6 months - %	5.34	-90.91	100



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Industry sectors the greatest number of people placed in the last month are in Trades & Services followed by Health & Medical. Overall placements have remained stable since last round

	<b>Mean</b>
Total number Placed	60.36
Trade & services – total placed	18.21
Health & medical – total placed	12.49
General Management – total placed	8.78
Marketing & advert – total placed	8.3
Logistics & supply – total placed	3.91
Education – total placed	1.99
Banking & Finance – total placed	1.66
IT & Telecoms – total placed	1.25
Logistics & supply – total placed	1.23
Bldg & Engineering – total placed	1.14
Legal – total placed	0.78
Hosp & Travel – total placed	0.33
Scientific – total placed	0.28



# The top 30 occupations are:

Nurses for local employment achieve top position. Numbers of people in each occupation have generally remained stable since last round.

	<b>Mean</b>
Health & medical - Nurses – for local employment	11.44
Trade & services - Process workers	6.80
Marketing & advertising - Call centre staff	4.06
Trade & services - Other manufacturing workers	3.21
Trade & services - Labourers	3.07
General management – Clerks	3.04
Marketing & advertising - Data entry staff	2.57
Logistics & supply - Stores people	2.42
General management – Secretary/PAs	2.13
General management – Receptionists	2.08
Trade & services - Metal trades	1.75
Education - Child care workers	1.65
Trade & services - Trades assistants	1.41
Marketing & advertising - Telemarketers	1.37
Logistics & supply - Driver	1.34
Banking & Finance - Accountants	0.83
General management – Senior management	0.73
Building & Engineering - Drafts people	0.55
Banking & Finance - Bookkeepers	0.54
General management – Recruitment consultants	0.51
IT & T – Computer systems engineers	0.51
Legal - Legal secretaries	0.49
Health & medical - Social workers	0.42
Trade & services - Electricians	0.40
Trade & services - Postal workers	0.40
Health & medical - Nurses – for export	0.35
IT & T – Programmers	0.27
Education - Teachers (kindergarten primary secondary)	0.27
IT & T – Computer software developers	0.25
Health & medical - Doctors	0.23
Building & Engineering - Civil/structural engineers	0.23

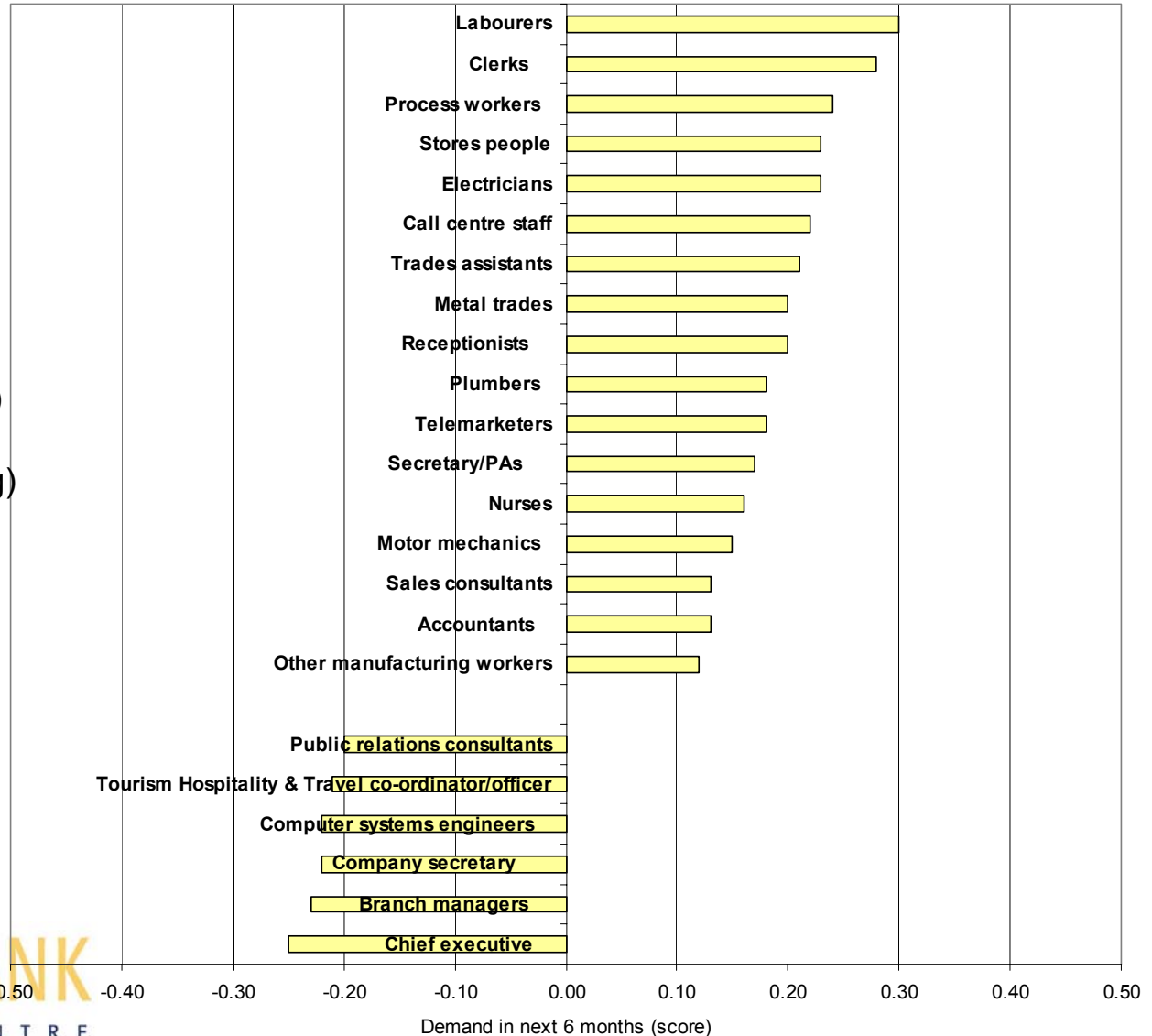




# Demand by occupation

Labourers, clerks, process workers and stores people are expected to be in most demand, while chief executives, branch managers and company secretaries are likely to be in least demand.

Scale:  
 -1 = Less demand (strong)  
 0 = Neutral  
 +1 = More demand (strong)



# Staff placed and on-hired workers

## March 2003

	Mean	Minimum	Maximum
Number of staff placed on client payrolls by your business	56.68	0.00	2,750.00
Total number of on-hired workers you manage	195.73	0.00	7,000.00
Number of hours billed for on-hired workers by your business	22,309.58	0.00	2,000,000.00

## December 2002

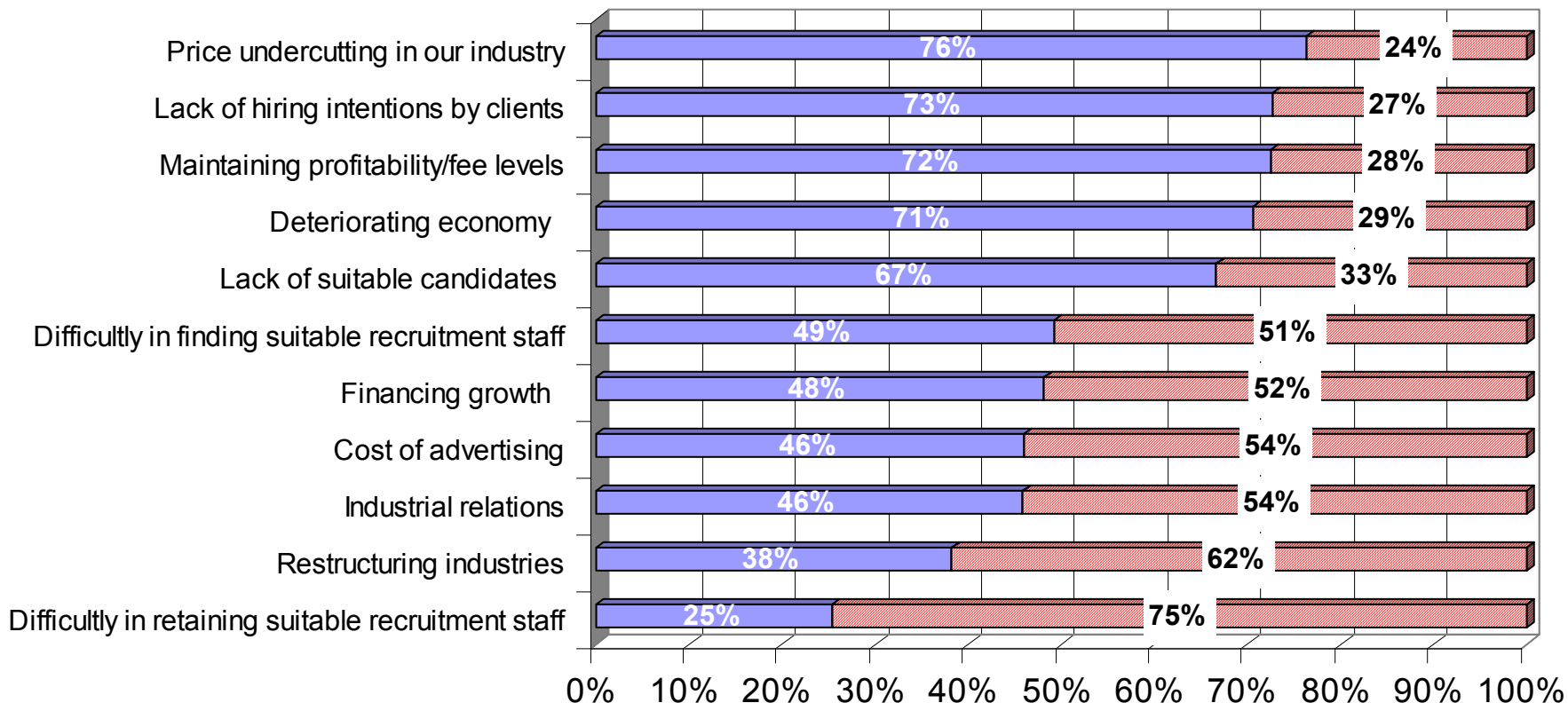
	Mean	Minimum	Maximum
Number of staff placed on client payrolls by your business	40.08	0	1,200
Total number of on-hired workers you manage	144.46	0	2,200
Number of hours billed for on-hired workers by your business	17,471	0	950,000



# Concerns for the present and near future

(all respondents)

Price undercutting remains the top concern but has decreased 3%. Concerns about lack of hiring intentions by clients is a greater concern (+10%) while concerns about the lack of suitable candidates has dropped by 5%.



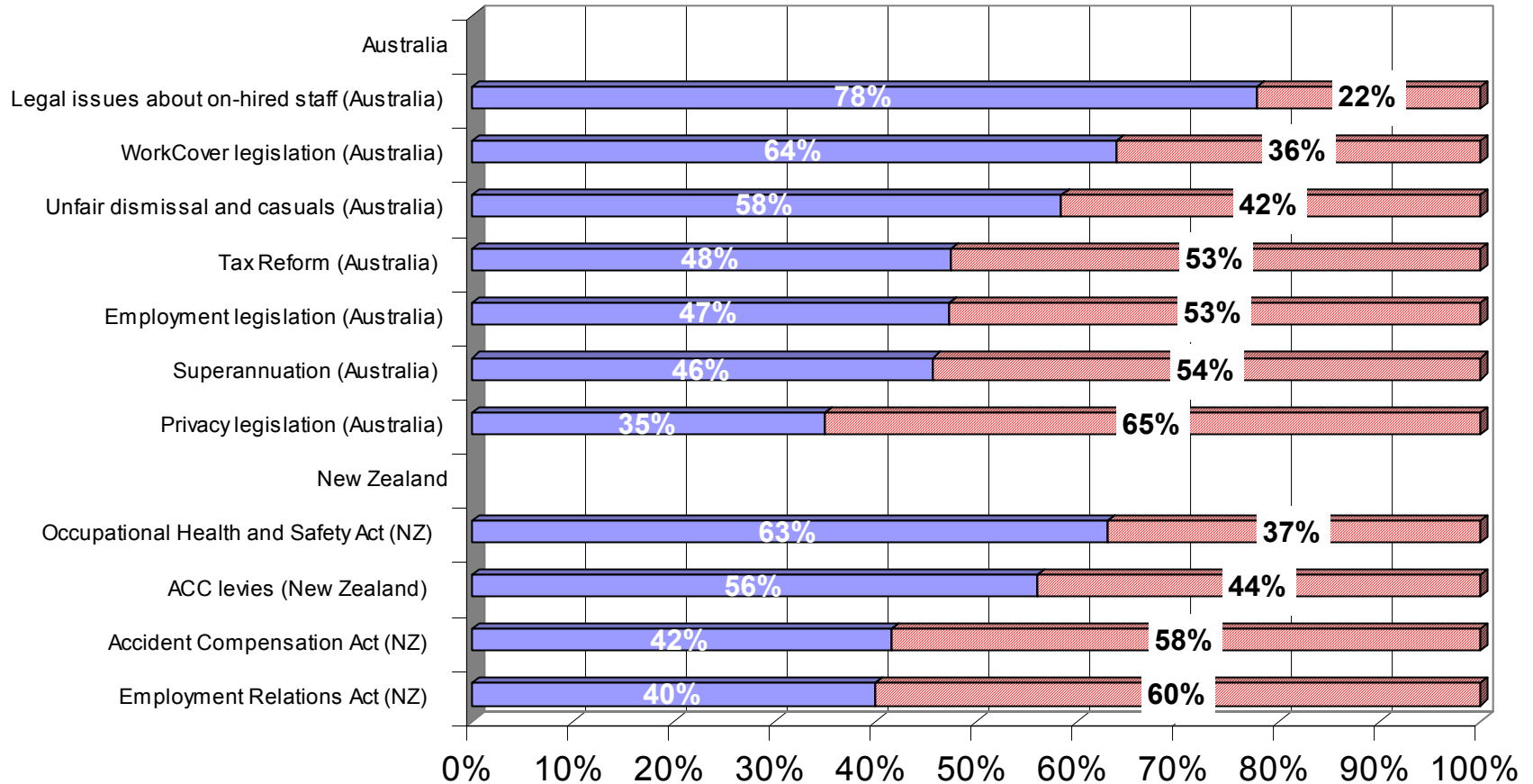
**VALUES BANK**

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**%Agree** **%Disagree**

# Concerns for the present and near future (National issues)

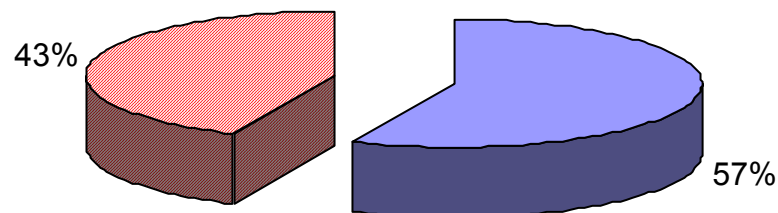
There is increasing concern about all issues (generally increased by around 4%). Legal issues about on-hired staff remain the strongest concern in Australia. OH&S is the most serious concern in NZ.



# Special section

# More than half of the respondents have recruited a candidate with disabilities

**On-hired or recruited a candidate with a disability for your clients?**



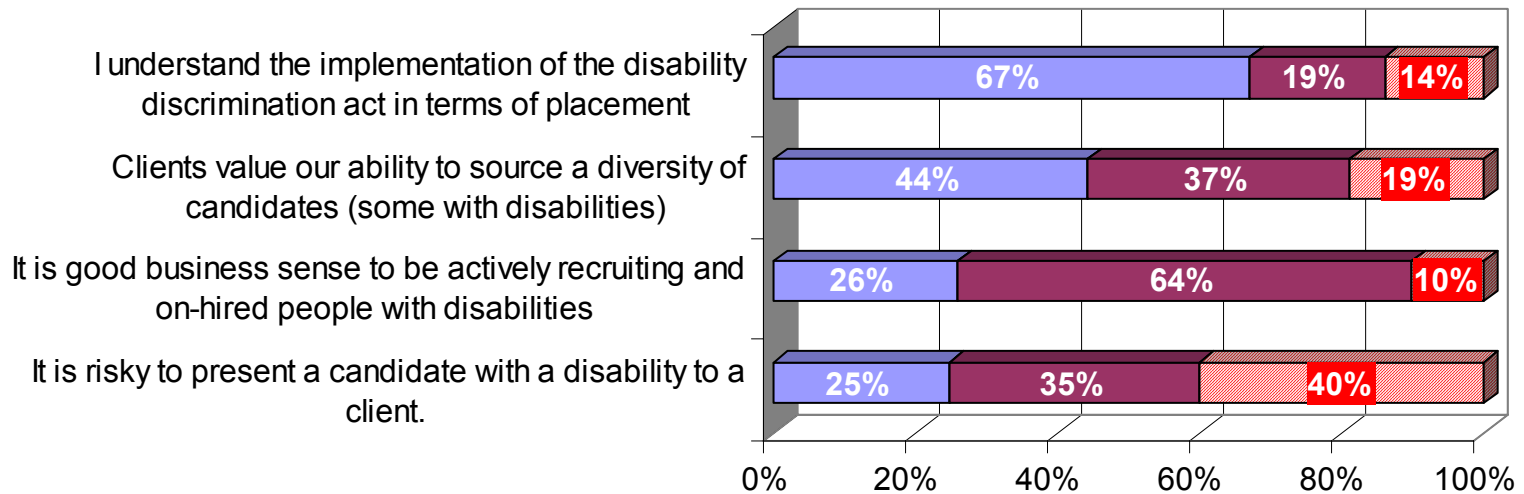
■ %Agree ■ %Disagree



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# Disability in business



■ %Agree ■ %Neutral ■ %Disagree



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# Changes to workplace and public awareness campaigns would increase disability placement by at least 5%

## Options to increase disability placement by 5%

