

RCSA Web Survey

Round 4 - July 2002

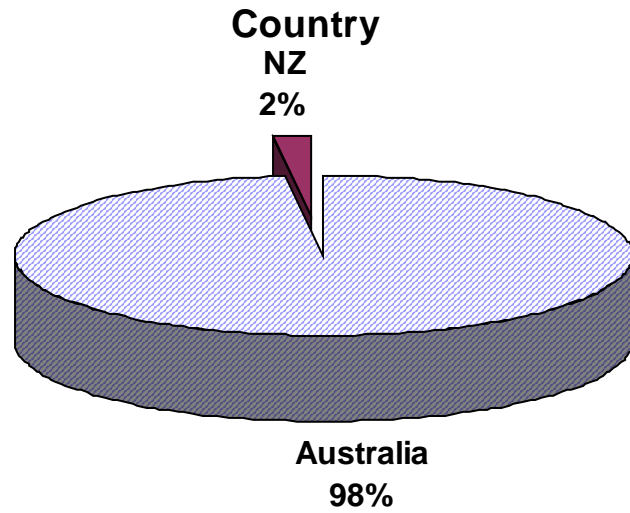
Executive Summary

- Overall, the survey showed slight easing in optimism for the immediate future
 - Members are:
 - Still expecting business to increase. 81% agree that it will increase in the next six months, compared to 85% for the last survey. This gives a –2.6% change in the RCSA Member Confidence Score
 - Expecting business volumes to rise by 6.6% similar to 6.7%
 - Finding it harder to locate suitable candidates (down 14%) and are much slightly less positive about the quality of the candidates
 - Continuing to experience a reduction in their own staff levels (down 4.4%) the same as the last survey
 - Members greatest concerns for the future are the same as last survey:
 - Price undercutting in their industry
 - Maintaining profitability/fee levels
 - Lack of hiring intentions by clients
 - Deteriorating economy
- 44% of white collar on-hired workers and 35% of blue collar on-hired workers are working under awards
- The age of on-hired workers, permanent staff, blue collar and white collar workers are similar at 35 years
- It is more difficult to find permanent positions for over 45s (53%) than on-hire positions (32%)
 - The biggest issue is employer attitudes followed by computer skills and work culture fit

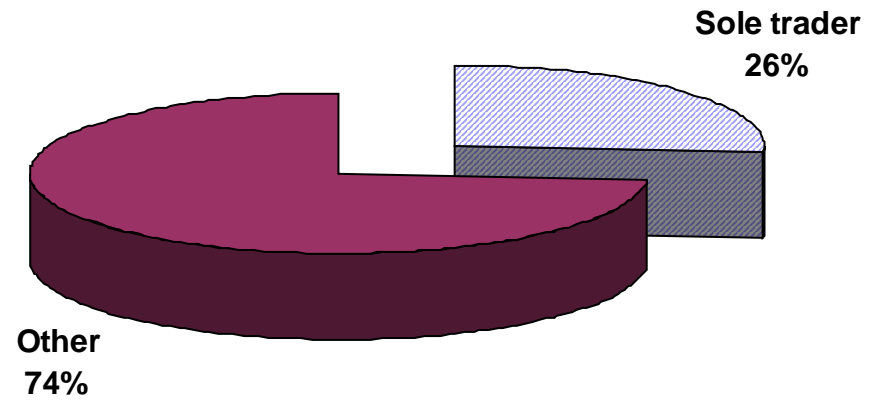
Process

- Web survey
 - E-mail business heads in both NZ and Australia
 - 125 responses

Demographics of sample

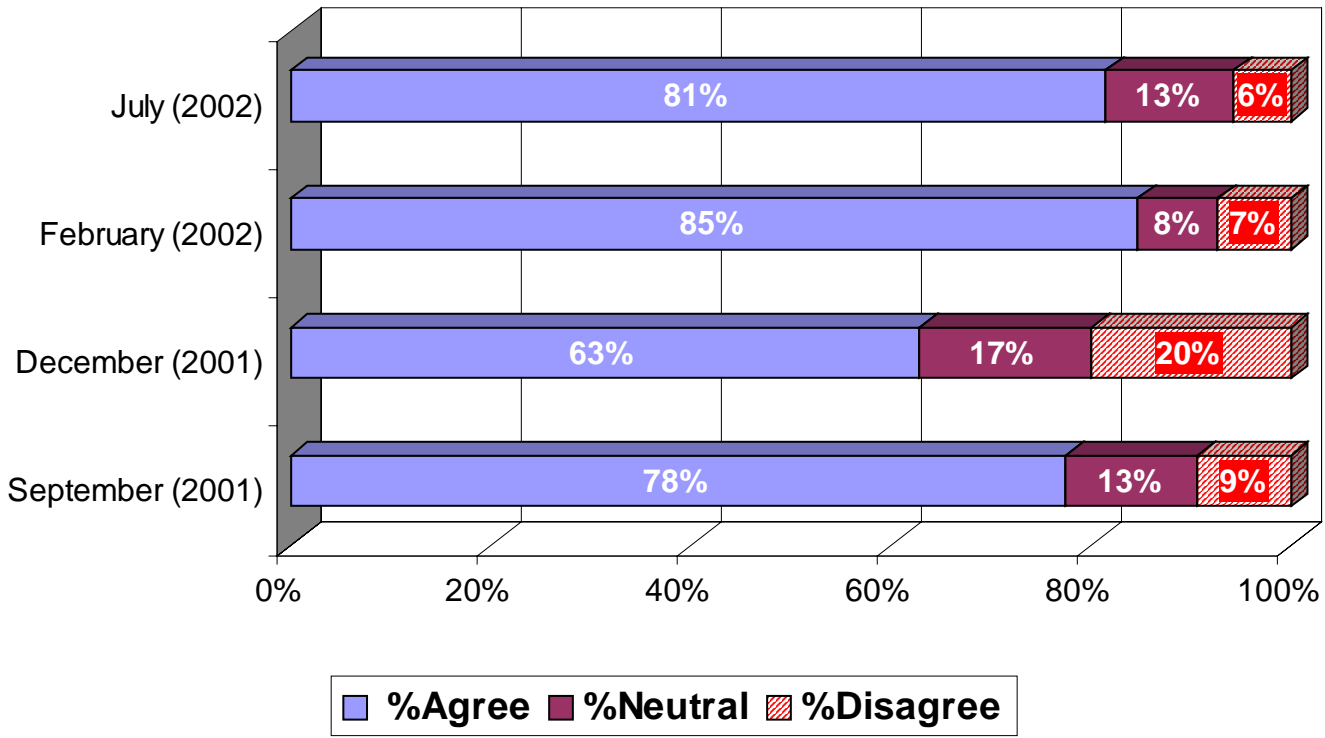


Trader status



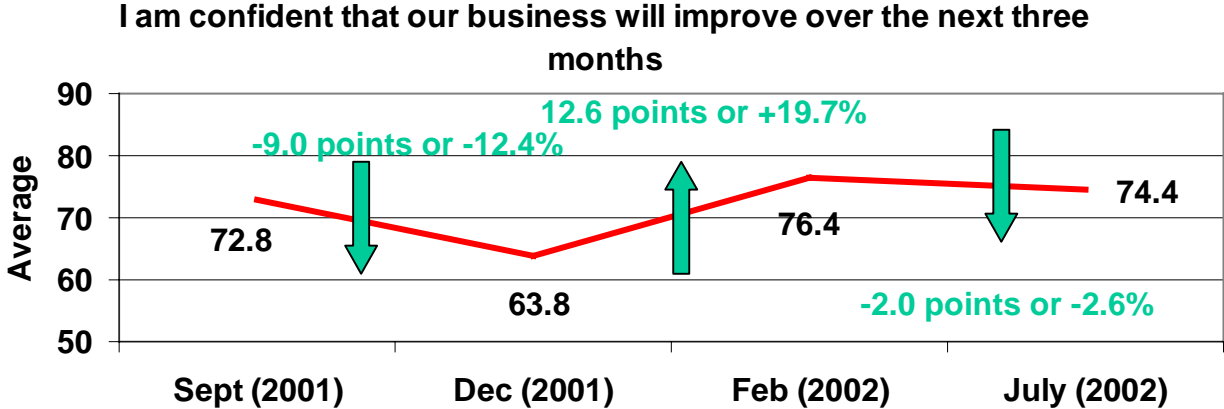
RCSA members are confident their business will improve in the next three months remains high.

Confidence that business will improve in the next 3 months

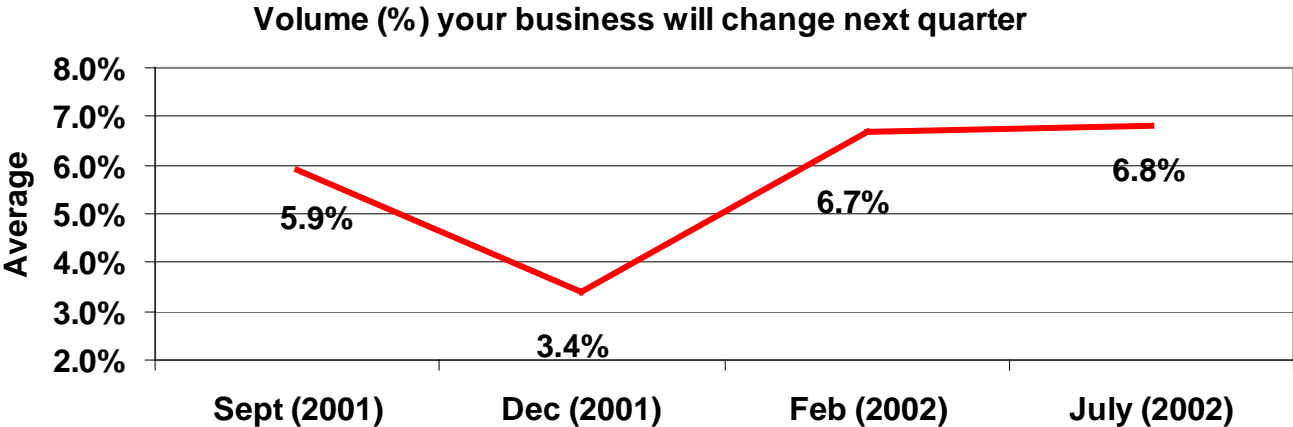


Expected volume of business increase in the next quarter =6.8% up from 5.8% last round

Business confidence remains high but has fallen slightly (by 2 points) since February. The expected growth in volume remains strong



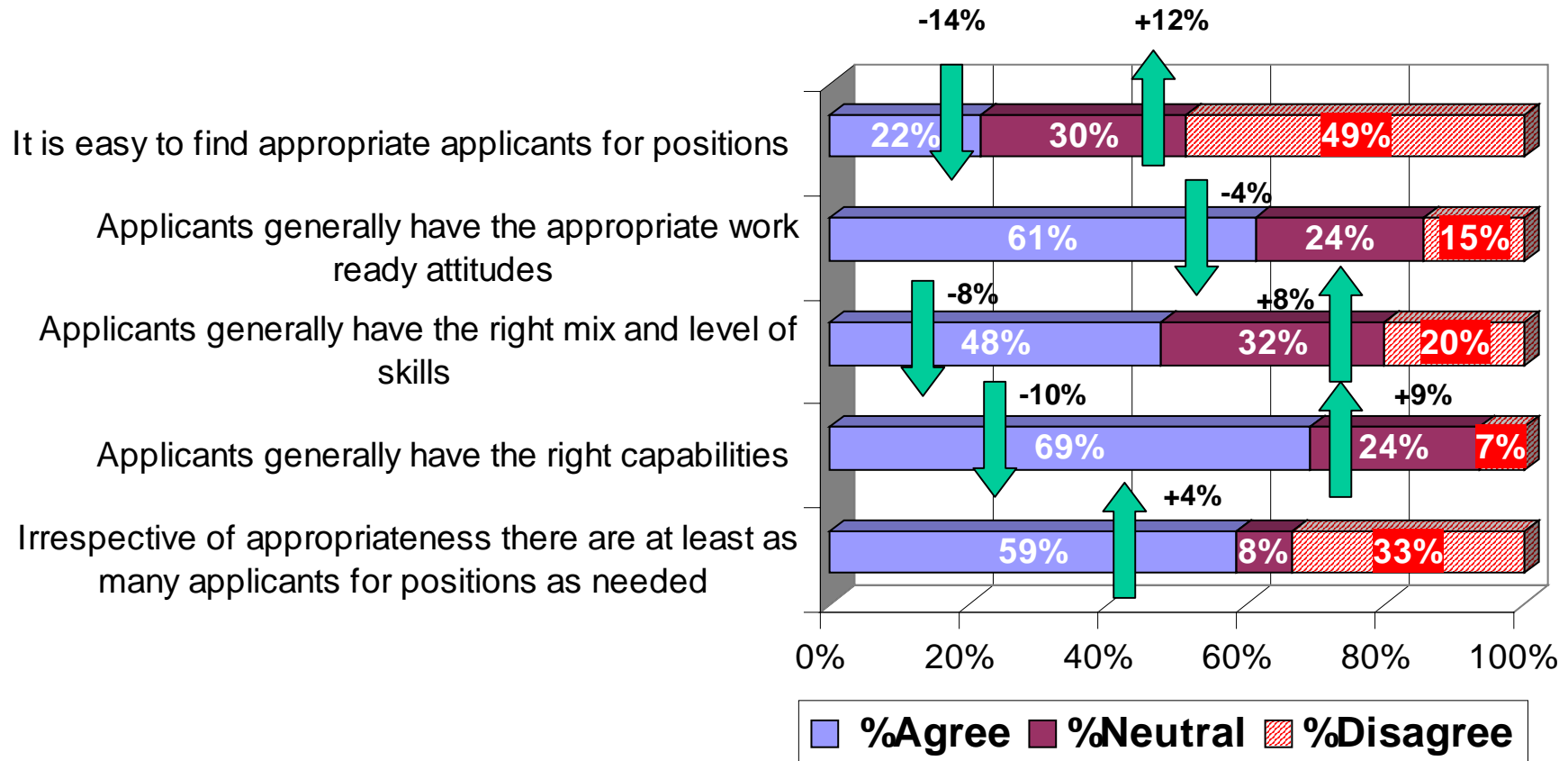
Scale:
 0=strongly disagree
 50=neutral
 100=strongly agree



Confidence in the labour market has reduced slightly since the last survey

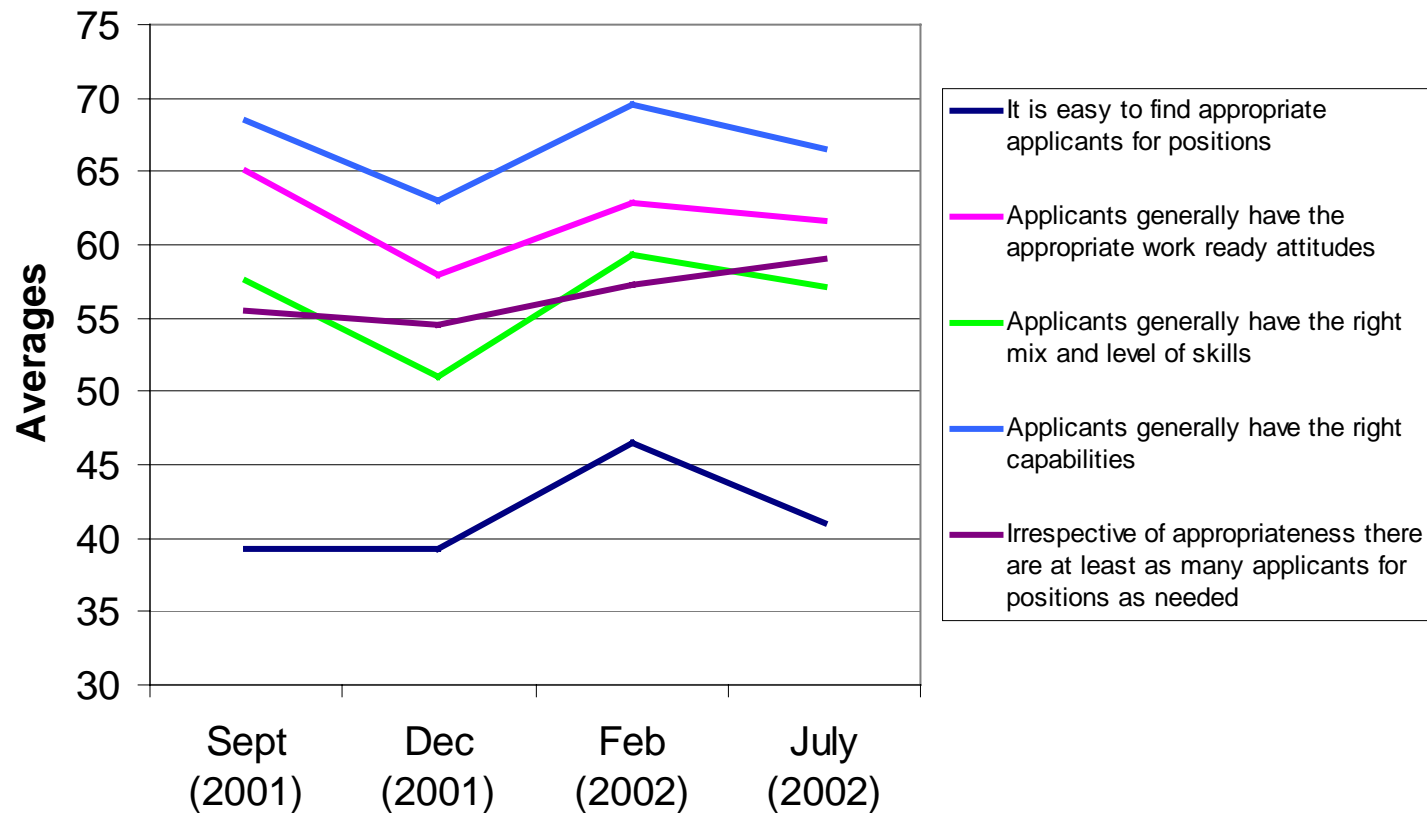
It is becoming harder to find appropriate applicants

Labour market



Labour market scores have eased slightly

Labour market scores



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

RCSA member staff turnover remains very high and staff levels shrank for the fourth survey in a row

There is extreme variability in the rate of staff turnover. RCSA members have similar levels of turnover as last quarter and are replacing fewer exiting staff

July 2002

	Mean	Minimum	Maximum
Equivalent full time internal positions in your business (include yourself)	16.35	1	338
Internal employees who left your business in the last six	2.82	0	96
Staff turnover 6 months - %	23.65	0	450
Internal employees who joined your business in the last six	2.24	0	33
Staff growth 6 months - %	-4.75	-450	100

February 2002

	Mean	Minimum	Maximum
Equivalent full time internal positions in your business (include yourself)	19.20	1	500
Internal employees who left your business in the last six	1.90	0	15
Staff turnover 6 months - %	23.50	0	150
Internal employees who joined your business in the last six months	1.40	0	10
Staff growth 6 months - %	-4.40	-150	100

Industry sectors the greatest number of people placed in the last month are in Trades & Services followed by Logistics and Supply

	Mean	Minimum	Maximum
Total number Placed	47	0	489
Trade & services - total placed	17.86	0	429
Logistics & supply - total placed	8.23	0	269
General Management - total placed	6.24	0	48
Marketing & advert - total placed	4.09	0	140
Logistics & supply - total placed	3.42	0	96
Banking & Finance - total placed	1.94	0	44
Legal - total placed	1.42	0	48
IT & Telecoms - total placed	0.9	0	15
Bldg & Engineering - total placed	0.87	0	25
Health & medical - total placed	0.82	0	68
Hosp & Travel - total placed	0.58	0	25
Education - total placed	0.39	0	24
Scientific - total placed	0.24	0	8

The top 30 occupations are:

Process workers again achieve the top position

	Mean	Minimum	Maximum
Trade & services - Process workers	7.04	0	300
Trade & services - Other manufacturing workers	2.66	0	100
Trade & services - Labourers	2.58	0	110
Logistics & supply - Stores people	2.35	0	75
General management – Secretary/PAs	1.94	0	48
General management – Clerks	1.7	0	22
Trade & services - Mining workers	1.24	0	150
General management – Receptionists	1.23	0	12
Marketing & advertising - Call centre staff	1.19	0	60
Trade & services - Metal trades	1.14	0	35
Banking & Finance - Accountants	1.08	0	30
Legal - Legal secretaries	1.06	0	45
Marketing & advertising - Advertising (eg copy writer account executive)	1.06	0	120
General management – Senior management	1.04	0	20
Trade & services - Nannies	1.02	0	126
Logistics & supply - Driver	0.84	0	36
Health & medical - Nurses – for local employment	0.81	0	68
Marketing & advertising - Telemarketers	0.78	0	75
Other 3_number	0.78	0	90
Trade & services - Trades assistants	0.68	0	25
Marketing & advertising - Data entry staff	0.58	0	25
Banking & Finance - Bookkeepers	0.39	0	8
Building & Engineering - Civil/structural engineers	0.34	0	10
Education - Teachers (kindergarten primary secondary)	0.31	0	24
IT & T – Computer software developers	0.31	0	8
Legal - Solicitors	0.3	0	12
Marketing & advertising - Marketing consultants	0.3	0	20
Trade & services - Electricians	0.29	0	15
Trade & services - Sales consultants	0.28	0	15
IT & T – IT Project managers	0.25	0	5
Building & Engineering - Drafts people	0.24	0	12
Banking & Finance - Business analysts	0.21	0	6

Staff placed and on-hired workers

July 2002

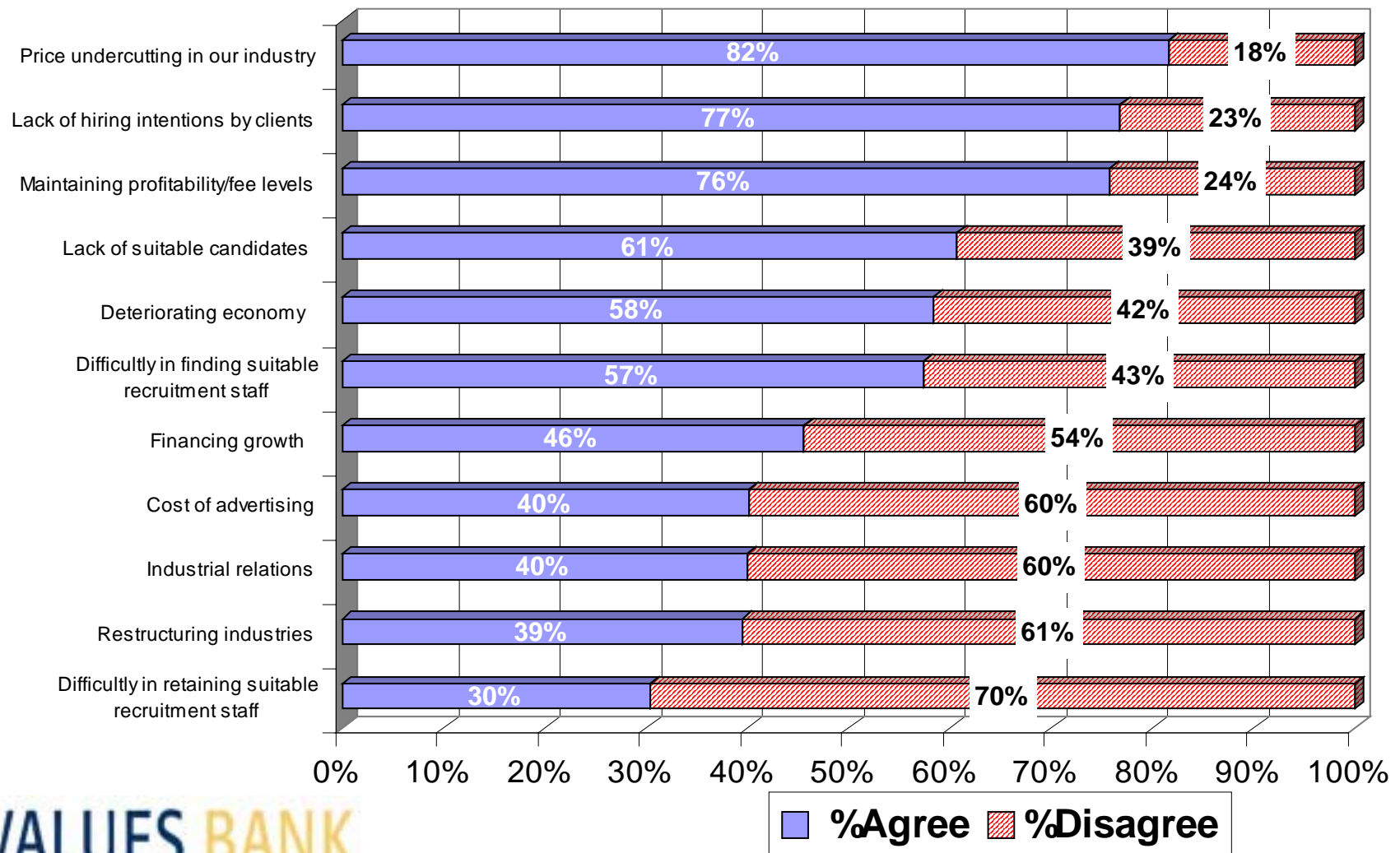
	Mean	Minimum	Maximum
Number of staff placed on client payrolls by your business	198.97	0	20,000
Total number of on-hired workers you manage	336.67	0	20,000
Number of hours billed for on-hired workers by your business	52,353	0	5,000,000

February 2002

	Mean	Minimum	Maximum
Number of staff placed on client payrolls by your business	65.40	0	6,000
Total number of on-hired workers you manage	168.10	0	5,824
Number of hours billed for on-hired workers by your business	22,153.10	0	2,000,000

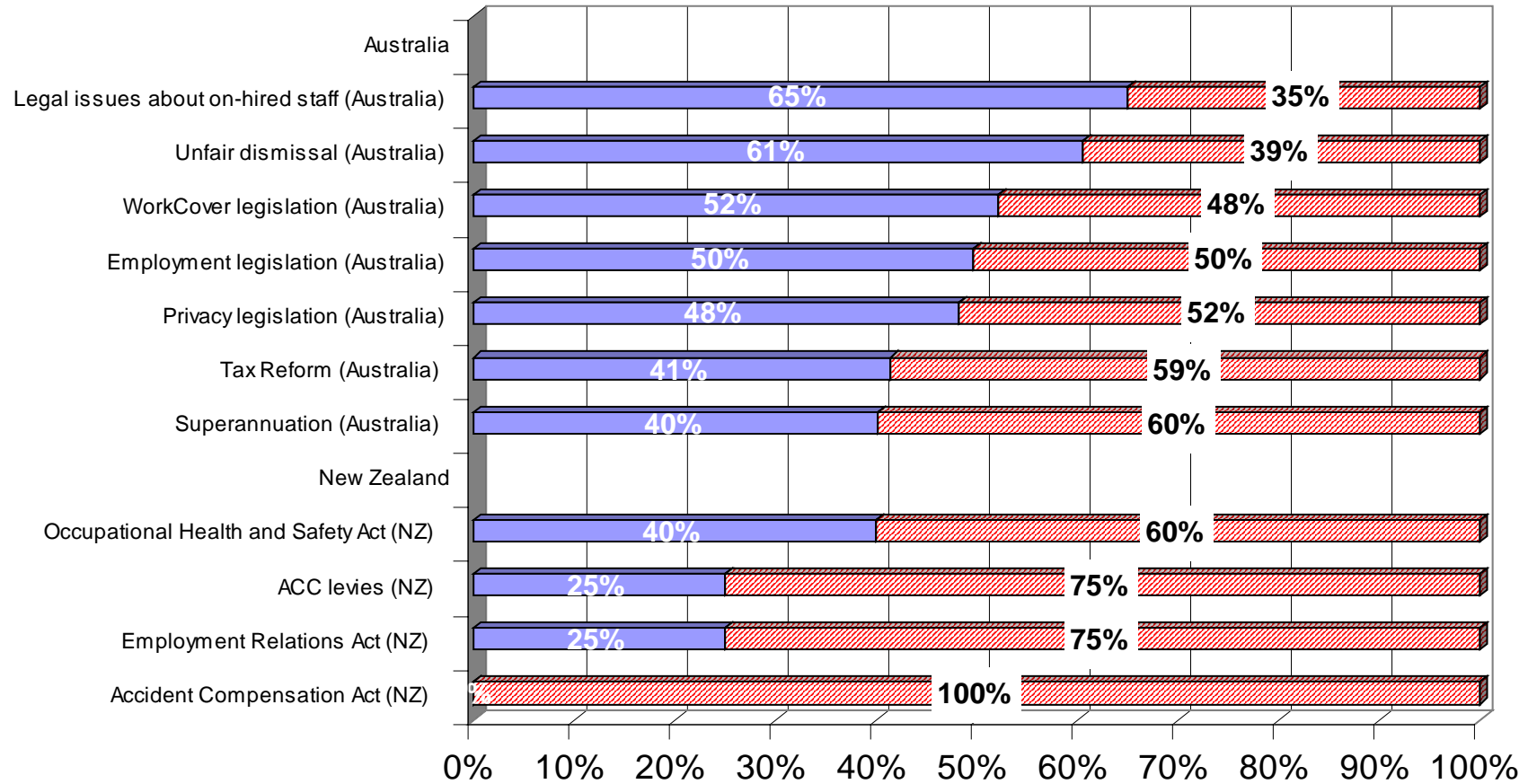
Concerns for the present and near future (all respondents)

Concerns about price undercutting is still the top concern and has increased 3%.
Concerns about lack of hiring intentions by clients has increased 4% and remains in third place.
The deteriorating economy remains constant in 2nd place.



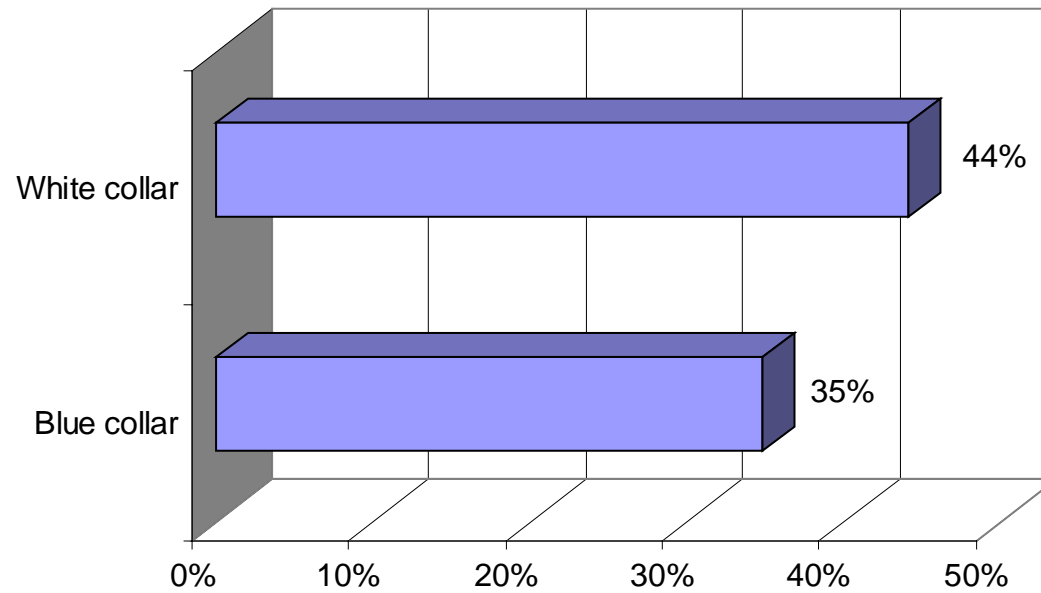
Concerns for the present and near future (National issues)

Legal issues have increased 3% in Australia. NZ sample too small to comment.



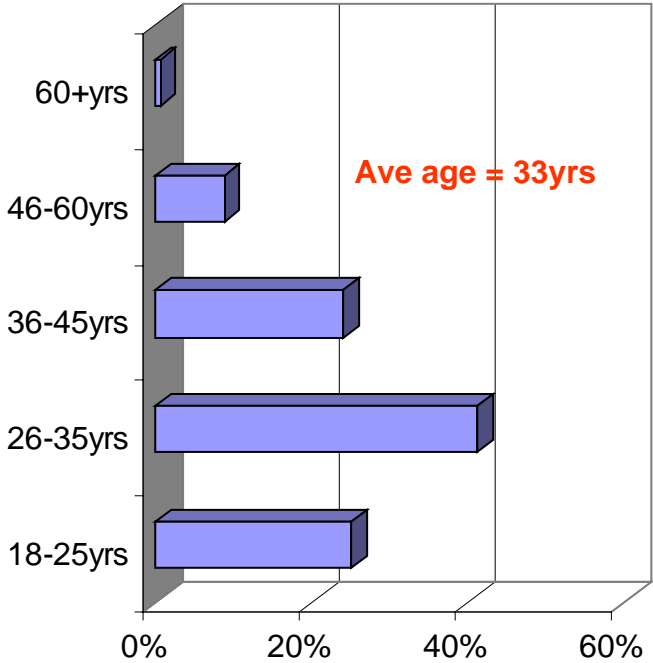
Special section

On-hired employees – working under awards

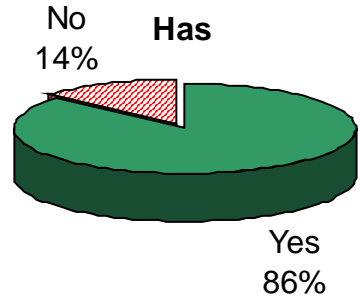
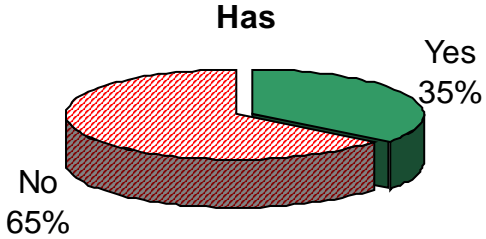
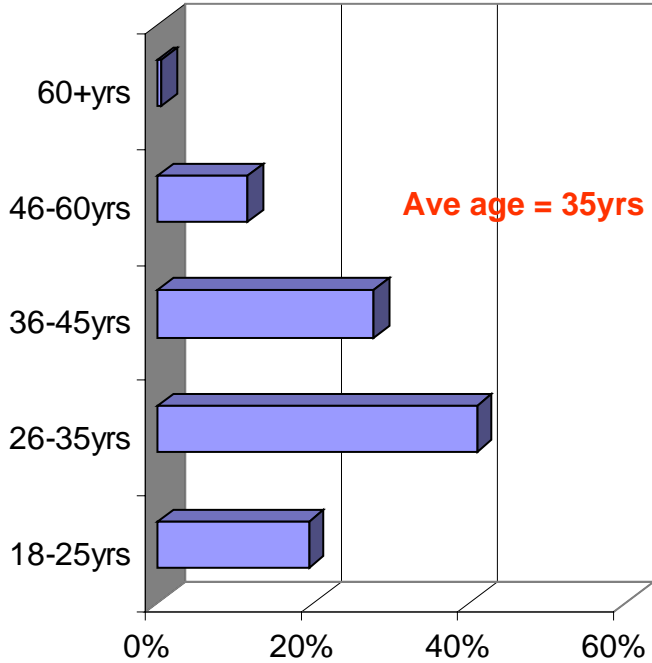


On-hired employees - age

Blue Collar

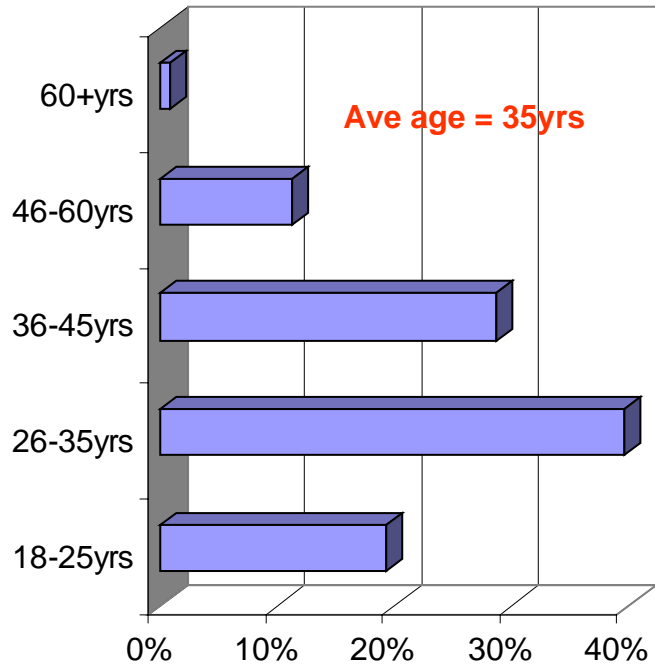


White Collar

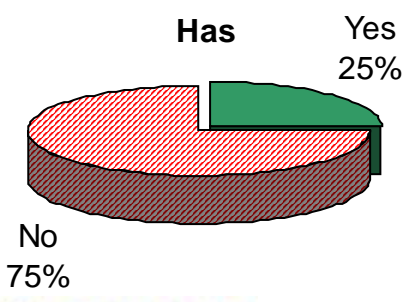


Permanent employees - age

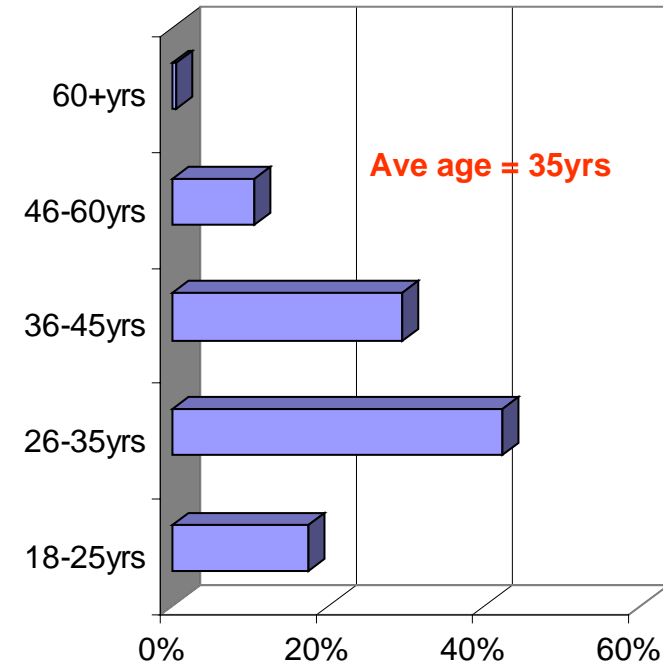
Blue Collar



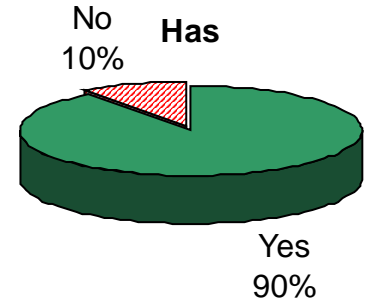
Ave age = 35yrs



White Collar



Ave age = 35yrs



Over 45s

