

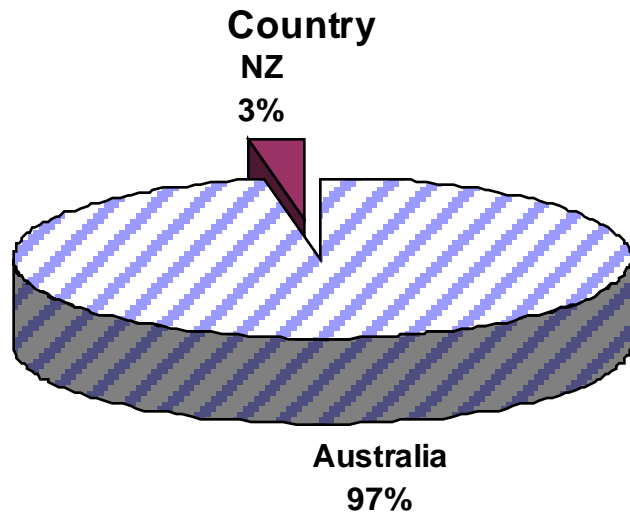
# RCSA Web Survey

Round 5 - September 2002

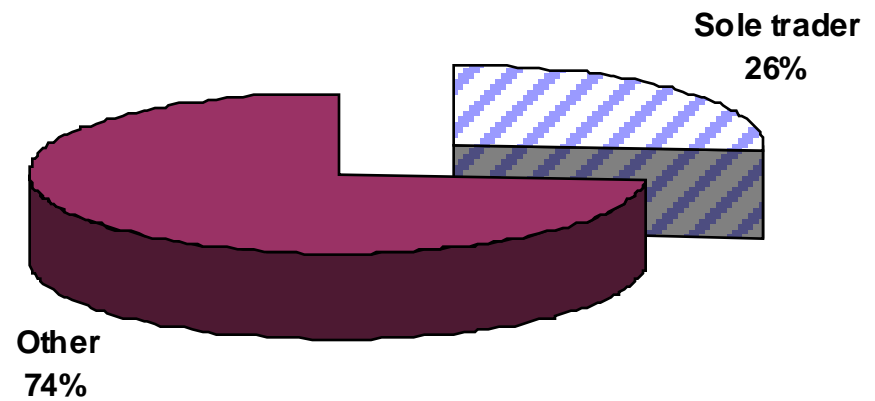
# Executive Summary

- Overall, the survey showed a marked easing in optimism for the immediate future
  - Members are:
    - Less confident - 67% agree that business will increase in the next three months, compared to 81% for the last survey. This gives a –9.2% change in the RCSA Member Confidence Score
    - Still expecting business to increase at a lower rate. They are expecting business volumes to rise by 4.6% compared to 6.6%
    - Finding it slightly harder to locate suitable candidates
    - Experiencing an increase in their own staff levels (up 2%) since the last survey. This is the first time the survey has recorded a rise in staff levels
  - 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
  - In Australia the greatest concerns for the future are:
    - Legal issues about on-hired staff (up 10%)
    - Unfair dismissal

# Demographics of sample

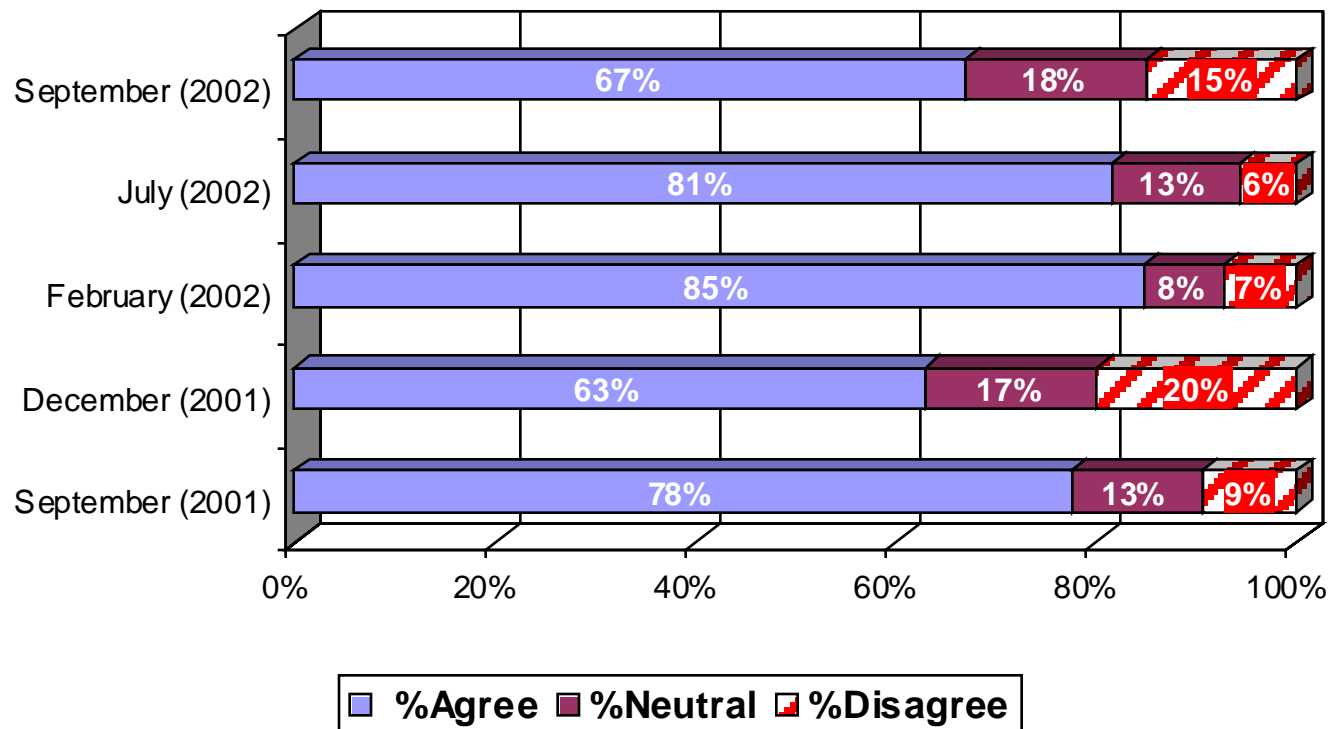


**Trader status**



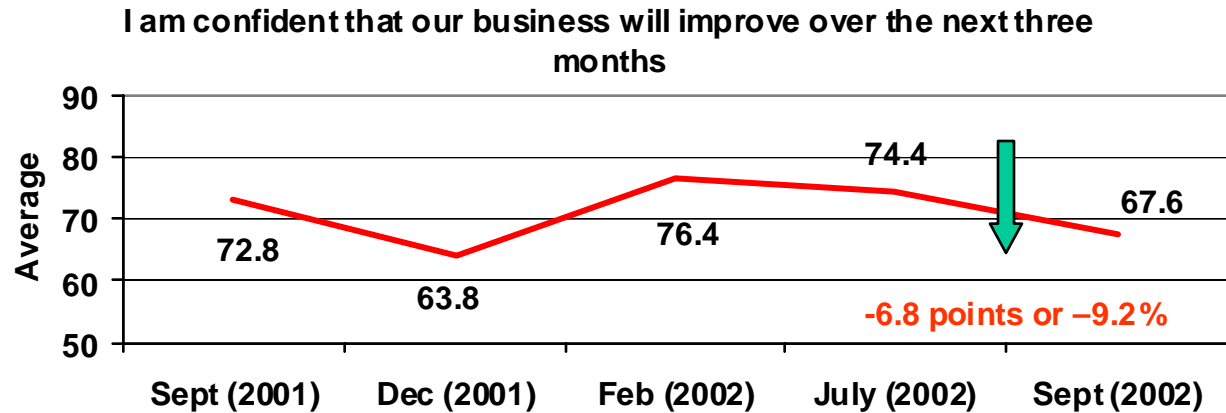
RCSA members are less confident their business will improve in the next three months.

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

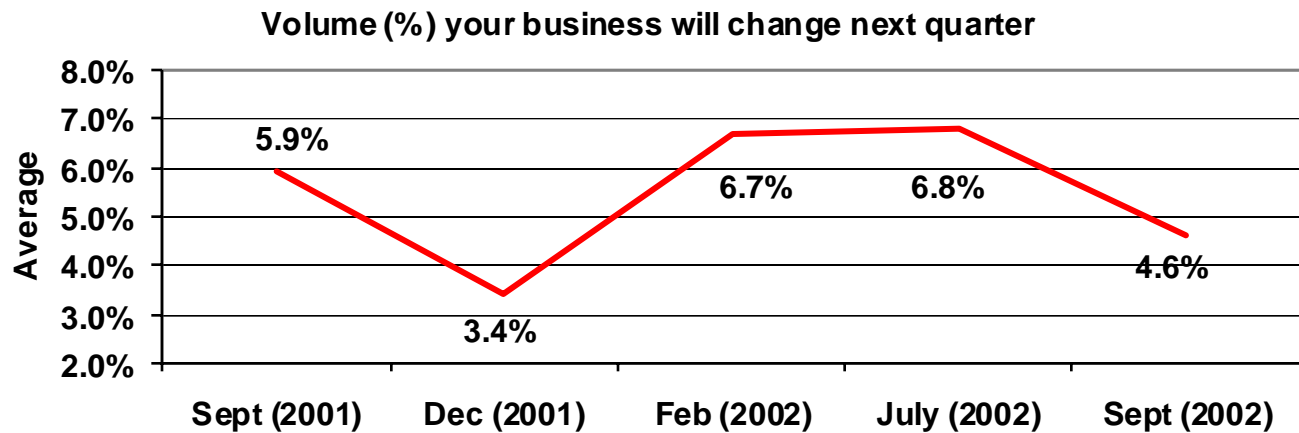


Expected volume of business increase in the next quarter =4.6% down from 6.8% last round

Business confidence has fallen since July but remains in the 'zone' between 60 and 80. The expected growth in volume has declined but still remains positive



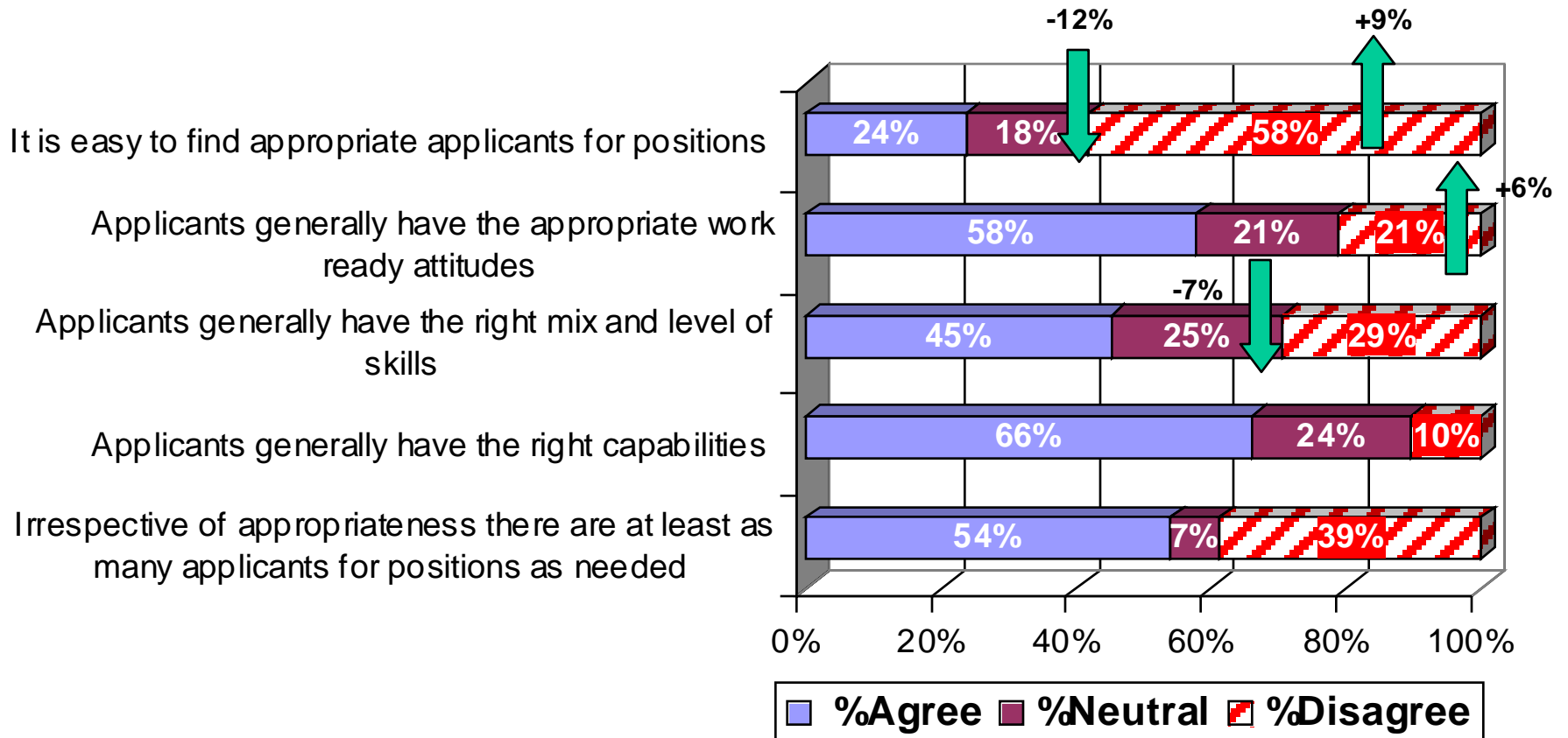
Scale:  
0=strongly disagree  
50=neutral  
100=strongly agree



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

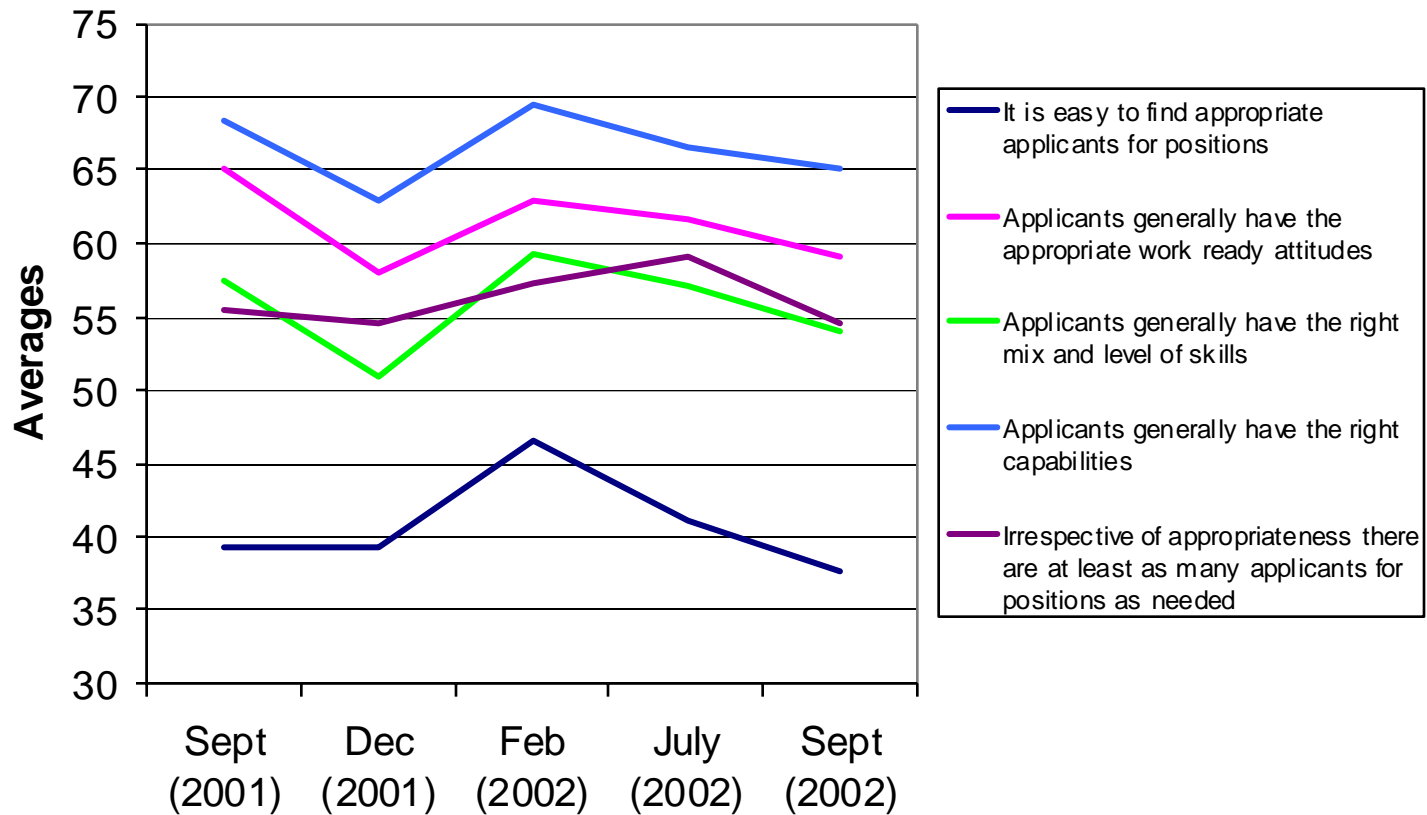
It is becoming harder to find appropriate applicants

## Labour market



# Labour market scores have eased again

## Labour market scores



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

## RCSA member staff turnover remains high but has eased and staff levels risen for the first time since Sept 2002

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

### Sept 2002

	Mean	Minimum	Maximum
Equivalent full time internal positions in your business (include yourself)	17.29	1	300
Internal employees who left your business in the last six months	2.04	0	31
Staff turnover 6 months - %	17.13	0	200
Internal employees who joined your business in the last six months	2.52	0	40
Staff growth 6 months - %	1.98	-150	150

### 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



Industry sectors the greatest number of people placed in the last month are in Trades & Services followed by Health & Medical (up from 10<sup>th</sup> position last time)

	Mean	Minimum	Maximum
Total number Placed	116	0	4108
Trade & services - total placed	50.69	0	2806
Health & medical - total placed	26.28	0	1810
Logistics & supply - total placed	12.55	0	1234
General Management - total placed	6.83	0	105
Logistics & supply - total placed	4.44	0	268
Hosp & Travel - total placed	3.97	0	489
Education - total placed	3.21	0	380
Marketing & advert - total placed	3.13	0	100
Bldg & Engineering - total placed	1.40	0	37
Banking & Finance - total placed	1.00	0	15
Scientific - total placed	0.98	0	86
IT & Telecoms - total placed	0.75	0	24
Legal - total placed	0.43	0	14

# The top 30 occupations are:

Nurses for local employment achieve top position while process workers have fallen from first to 4<sup>th</sup> position

	Mean
Health & medical - Nurses – for local employment	25.70
Trade & services - Labourers	13.48
Trade & services - Other manufacturing workers	12.39
Trade & services - Process workers	8.90
Logistics & supply - Stores people	6.72
Logistics & supply - Driver	5.66
Trade & services - Nannies	4.89
Hospitality & Travel - Cleaners	3.12
Education - Child care workers	2.70
Trade & services - Wine industry workers	2.50
Trade & services - Metal trades	2.48
General management – Clerks	2.31
Trade & services - Trades assistants	1.86
General management – Secretary/PAs	1.72
General management – Receptionists	1.65
Marketing & advertising - Call centre staff	1.65
Trade & services - Mining workers	1.37
Trade & services - Cabinet makers	1.19
Marketing & advertising - Data entry staff	0.88
General management – Senior management	0.83
Scientific - Laboratory technicians	0.79
Banking & Finance - Accountants	0.49
Marketing & advertising - Telemarketers	0.48
Education - Teachers (kindergarten primary secondary)	0.48
Building & Engineering - Civil/structural engineers	0.43
Hospitality & Travel - Waiters/waitresses	0.41
Trade & services - Electricians	0.40
Building & Engineering - Builders	0.38
Building & Engineering - Drafts people	0.35
Legal - Legal secretaries	0.34

# Staff placed and on-hired workers

## September 2002

	Mean	Minimum	Maximum
Number of staff placed on client payrolls by your business	49.21	0.00	2,300.00
Total number of on-hired workers you manage	230.34	0.00	4,239.00
Number of hours billed for on-hired workers by your business	18,257	0	600,000

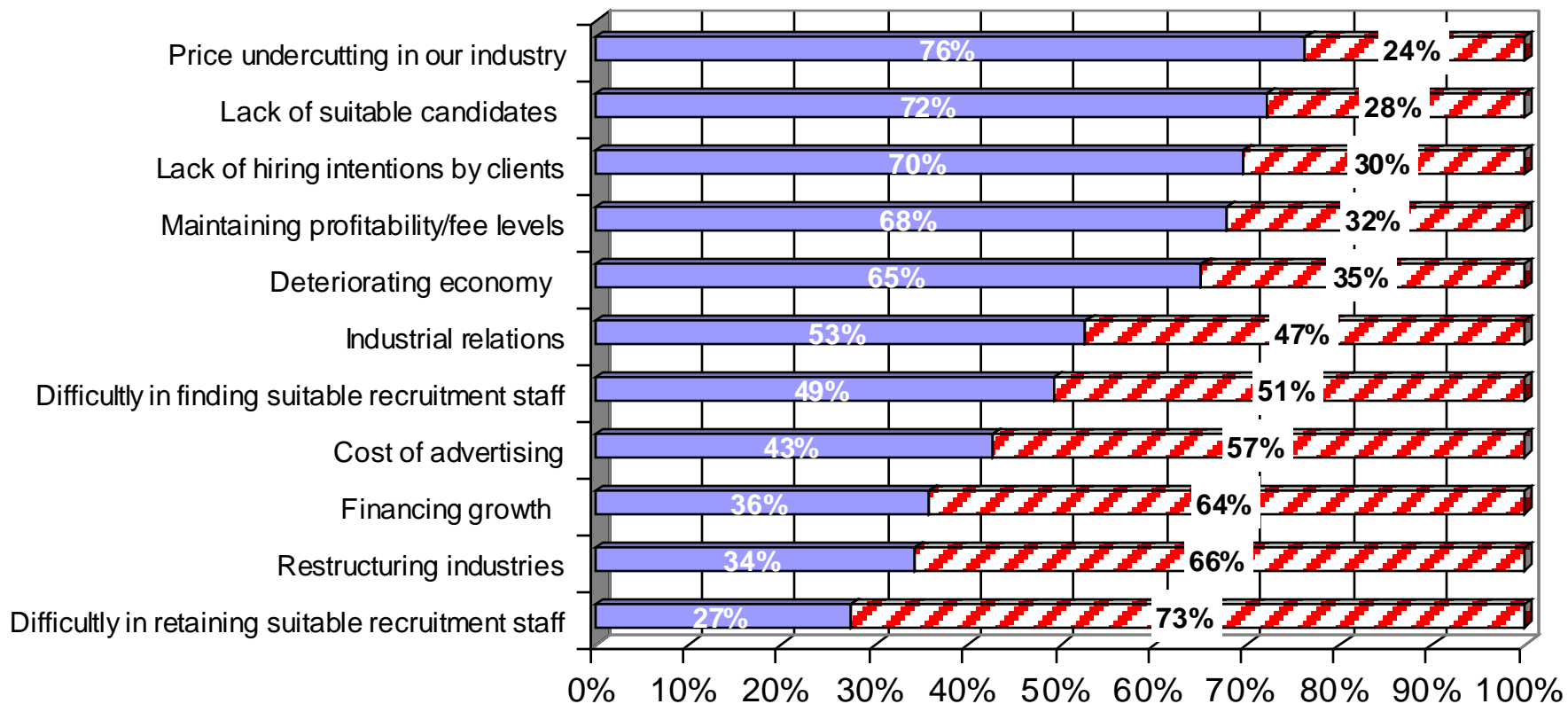
## July 2002

	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

# Concerns for the present and near future

(all respondents)

Price undercutting is still the top concern but has decreased 6%. Concerns about lack of hiring intentions by clients has decreased 7% and remains in third place. Lack of suitable candidates has increased by 10% and risen to 2<sup>nd</sup> place from 4<sup>th</sup>.



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

Legal issues about on-hired staff have increased again this time by 10% in Australia. NZ sample too small to comment.

