Australian Workplace Innovation and Social Research Centre

THE STRETTON CENTRE

Workplace Futures

Survey – Playford & Salisbury

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CITY OF Playford

THE UNIVERSITY of ADELAIDE
AUSTRALIAN WORKPLACE INNOVATION AND SOCIAL RESEARCH CENTRE

Workplace Futures

Survey – Playford & Salisbury

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The Australian Workplace Innovation and Social Research Centre (WISeR) *focuses on work and socio-economic change. WISeR is particularly interested in how organisational structure and practices, technology and economic systems, policy and institutions, environment and culture interact to influence the performance of workplaces and the wellbeing of individuals, households and communities.*

WISeR also specialises in socio-economic impact assessment including the distributional impacts and human dimensions of change on different population groups and localities. Our research plays a key role in informing policy and strategy development at a national, local and international level.

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EXECUTIVE SUMMARY

Adelaide's northern suburbs face significant challenges over the next five to ten years as they contend with high local unemployment and impending closures in regional manufacturing. At the 2011 Census, establishments located in the Cities of Playford and Salisbury employed 8.6% of South Australian workers and 16% of the state's manufacturing workers. It is, therefore, critical to understand the current and future employment and skill requirements of employers in the area to better support policy development and planning. The Australian Workplace Innovation and Social research Centre (WISeR) through the *Workplace Futures Survey (WFS) – Playford and Salisbury* is seeking to address some of these questions.

The first WFS survey[1] administered in November 2013 provides a baseline, having been conducted prior to the announcement of the 2017 closure of GM Holden. Respondents from 451 establishments (with over 12,500 employees participated in the survey) - a response rate of 12.5%.

EMPLOYMENT

The employer landscape[2] in the cities of Playford and Salisbury is dominated by small businesses (48%) employing 2 to 4 workers (including working proprietors). The manufacturing industry was the biggest employment provider, contributing around 20% of employment and accounting for almost 12,500 employees in the region. Staff numbers in more than half (58%) the establishments had remained stable from November 2012 to November 2013, while 26% of establishments experienced growth and 16% decline in the number of staff employed during the year.

EMPLOYER SENTIMENT

Central to business performance is employer sentiment, which was assessed across five indicators. Employers were relatively optimistic in their expectations for **growth** with one in two employers expecting moderate business growth and nearly 9% expecting strong growth to November 2014. Overall, employers were cautiously optimistic in their **intentions to invest** in the next 12 months (to November 2014) with 12% expecting a strong increase and a further 40% indicating a moderate increase in their expectation to invest. Eight percent of employers expected a strong increase in **sales** in the next 12 months, with an additional 45% indicating a moderate increase. One in four employers expected no change in sales, with a few (7%) expecting a moderate or strong decrease. Half the employers expected either a strong or moderate increase in business **profits,** with more than one third (37%) expecting no change. Employers were generally cautious in their **recruitment intentions** with the majority (61%) indicating no change in recruitment in the 12 months to November 2014 and only one-third indicating an intention to recruit during this time.

ORGANISATIONAL PLANNING AND PERFORMANCE

More than one in four employers did not conduct an annual performance review or have a formal written job description for any of their workers. More than two-thirds of employers had a business plan, while only 29% had a workforce plan. Employers identified tax burden, customer demand, competition in the market place, availability of capital and skills shortage as primary factors that affect performance. Attracting qualified staff, skills development for employees and managers, application of new technology, improving leadership skills within the organisation and employee participation in decision making emerged as dominant factors that were seen to improve organisational performance.

Organisational collaboration occurred in the region, but there was some room for growth. Around four in ten (41%) establishments always or often collaborated through the exchange of skills. One quarter (24%) always or often exchanged knowledge, one in five (20%) shared equipment, while organisational sharing of staff (7%) was uncommon.

[1] Subsequent surveys will be conducted six monthly.

[2] Note that approximately 68% of Playford and 65% of Salisbury establishments were sole owner-operated or did not employ two persons and are not included in this survey. All reported data and results refer to enterprises with two or more employees.

VACANCIES

In terms of vacancies there were an estimated[3] 1,000 vacancies in the region at November 2013 with around 3,500 vacancies expected from November 2013 to November 2014.[4] Vacancies (46%) were usually advertised via the internet with a significant proportion using informal methods (36%) to promote vacancies such as word of mouth, friends and colleagues. There was a high level of demand – both current and future - for technicians and tradespersons, with one in 5 employers with a vacancy reporting an opening in these roles. The highest demand for these occupations came from the construction industry.

Attracting experienced and qualified staff was a major issue for employers in the area (reported by 37% and 38% of employers, respectively). Just over one in ten employers reported a hard-to-fill vacancy usually related to higher skilled occupations (most commonly technicians and tradespersons, professionals, and machinery operators).

EMPLOYING LOCALLY

Nearly 70% of employers indicated that hiring local people was desirable or very desirable. However, almost one half of employers had no staff living within 5km of the workplace. Decisions about hiring local people were influenced by perspectives that local people did not have the skills needed (39%) or lacked experience (36%).

WORKFORCE DEVELOPMENT

The majority of employers reported that they followed good workforce development and training practices. Most (85%) supported training and development, while three-quarters (75%) recognised prior learning. Sixty percent of employers formally assessed skill gaps which were then addressed through training, mentoring and staff supervision. Training methods most commonly applied include on the job learning, formal training programs and in-house training courses.

Occupations requiring up-skilling in the next 12 months reflected the occupations identified as hard-to-fill including skilled trades, technical/associate professionals and professionals, while specific skills needing improvement in the next 12 months include technical, practical or job-specific skills, general IT user skills and problem solving skills.

Three quarters (73%) of employers reported that they had arranged or funded training for staff in the last 12 months, although up-skilling was clearly recognised as a continual process as six in ten employers also indicated the need for updates before November 2014. Cost was the most commonly reported barrier to training, identified as an issue by one-third of employers.

[3] Note that regional estimates are based on survey responses and extrapolated to the Playford and Salisbury employer and employee populations (as described in Section 2.2).
[4] Noting that the survey responses pre-dated the GM Holden closure announcement.

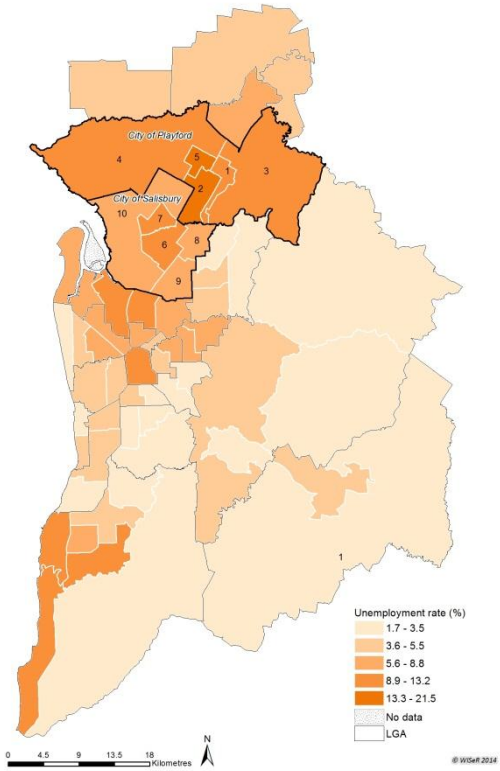
1 The Cities of Playford and Salisbury

Adelaide's northern suburbs face significant challenges over the next five to ten years as the impact of the closure of GM Holden in 2017 are felt alongside the closure of Ford and Toyota in Australia. These closures are set to impact downstream on the supply chain with flow-on effects reverberating through the local and state economy (Burgan & Spoehr, 2013). While the impacts are widespread, the most direct impact in South Australia will be in the City of Playford, where GM Holden is situated, and in the City of Salisbury which together have 2,300 residents engaged in motor vehicle and motor vehicle parts manufacturing (Australian Bureau of Statistics, 2011).

Encompassing 35 suburbs and spanning 346 km^2, the City of Playford is situated approximately 30 km from the Adelaide CBD. In the northernmost fringes of the city, urban development provides opportunities and affordable housing, while open spaces still make up around one-fifth of the area. Neighbouring Playford, the City of Salisbury is around 25 km north of the Adelaide CBD with 31 suburbs. Spanning 158 km^2, it is less than half the size of Playford but contains a population approximately 40% higher.

Many of the residents in these northern urban local government areas (LGAs) are already facing hardship with high unemployment (see Figure 1) and extreme social disadvantage (see Box 1). Youth unemployment (15 to 24 year old) is particularly high across Playford (18.3%) and Salisbury (14.6%). In addition, proficiencies in literacy, numeracy and problem solving in technology-rich environments are also at the lower end of the spectrum in these areas (Australian Bureau of Statistics, 2014a).

Figure 1: Unemployment rate, Greater Adelaide, September 2013



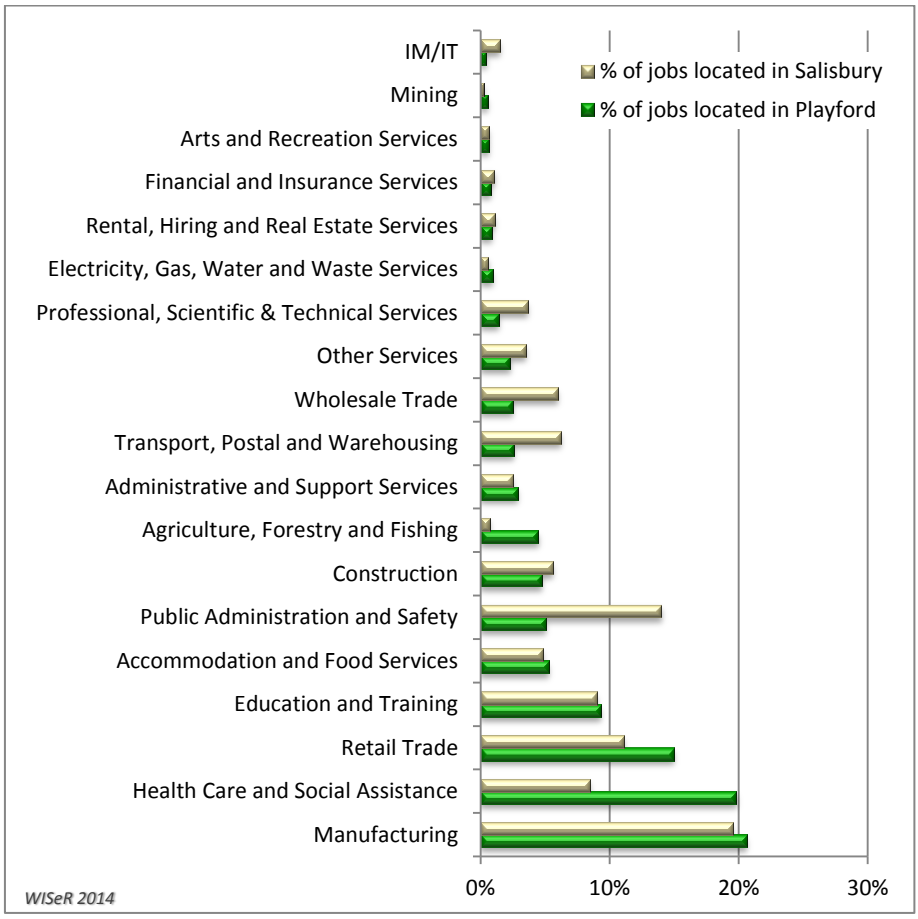
Box 1: Socio-Economic Indexes for Areas (SEIFA) – Index of Relative Disadvantage

The SEIFA provides a ranking of socio-economic wellbeing for areas across Australia. It is derived from measures including low income, low educational attainment, unemployment and dwellings without motor vehicles. SEIFA scores are standardised to a distribution where 1000 is the average (mean) with a standard deviation (SD) of 100. Just over two-thirds of the population will have a score between 900 and 1100 (ie one SD above and below the mean). Only 2% of any population will have a SEIFA score of 800 or lower.

Calculations based on data provided in the last Census rated the ***City of Playford*** *the most disadvantaged LGA in Greater Adelaide and one of the most disadvantaged urban areas in Australia with a rating of 871. There were considerable variations at the smaller area level where the statistical area (SA2) of* Elizabeth *in Playford rated as an outlier with A SEIFA score of 720, while* Smithfield – Elizabeth North *(SA2) rated 775 indicating that many of the almost 22,000 residents in these areas are living in extremely deprived circumstances. The SEIFA disadvantage rating for the* ***City of Salisbury*** *was comparatively higher at 937.However, the* Salisbury – Central *area ranked 11th lowest in the state, but third lowest in metropolitan Adelaide with a score of 874. Although not as extreme or pervasive as in some areas of Playford, Salisbury has pockets of extreme disadvantage.*

At the 2011 Census, establishments located in the Cities of Playford and Salisbury employed 8.6% of South Australian workers and 16% of the state's manufacturing workers with manufacturing providing 20% of employment in both LGAs (see Figure 2). With the forthcoming departure of GM Holden from the area, it is critical to understand the current and future employment and skill requirements of employers in the area to better support policy development and planning. Both employers and employees recognise the need to continually improve skills to take advantage of job opportunities and to ensure they keep pace with new technologies. Around one-quarter of working age South Australians (aged 15 to 74 years) reported participating in training to increase their skills for their current job in the year to April 2013 (Australian Bureau of Statistics, 2013a). However, information about the skill needs of industries in specific regions has not been readily available to date.

FIGURE 2: EMPLOYMENT BY INDUSTRY (% OF JOBS IN PLAYFORD AND SALISBURY), 2011



Source: Australian Bureau of Statistics 2011 (Count method: Place of Work)

In South Australia, the four year survival rate for businesses existing at June 2009 was 66%, while the survival rate for new businesses commencing in 2009 to 2010 was only 51% to June 2013 (Australian Bureau of Statistics, 2014b)[5]. WISeR are engaged in an ongoing program to better understand business conditions, the perspectives of employers, workforce conditions, worker skills and employment opportunities in the northern metropolitan area. This work aims to inform policy and program provider ability to better identify and target the right services and training to support employers to locate the right employees and workers to find sustainable jobs.

[5] Although it should be noted that South Australian businesses had the highest survival rates on the mainland.

2 Workplace Futures Survey

The *Workplace Futures Survey (WFS) – Playford and Salisbury* is a series of longitudinal workplaces surveys implemented in the Cities of Playford and Salisbury in the northern Adelaide region. The WFS is managed by the Australian Workplace Innovation and Social Research Centre (WISeR) for the Stretton Centre with funding from the federal government Suburban Jobs Program. The surveys are designed to capture workplace and business intelligence to inform industry and workforce development in the region. It was developed in consultation with a number of key stakeholders including the City of Playford, DFEEST, and DEEWR. The first wave of the survey[6] was completed in November 2013, and incorporates responses from 451 employers across the Cities of Playford and Salisbury.

2.1 Aims and objectives

A primary aim of the WFS is to provide in-depth information on a range of workplace issues and trends to help inform and better evaluate industry, workforce and workplace development policy and programs. In this context, the WFS has been designed to provide robust measures of:

- Employer confidence measured along five indicators including intentions to invest and recruit, expectations of profits, sales and business growth for the next 12 months;
- Factors that affect organisational performance;
- Recruitment issues, including hard to fill occupations and skills, and reasons for having hard to fill vacancies;
- Issues related to employing local residents;
- Skill deficiencies among the workforce, and the nature of skills gaps;
- Workforce training and development; and
- Barriers to training.

Based on extensive consultations with key stakeholders, it was determined that surveys be conducted no more than twice a year in order to minimise respondent burden, increase response rates, enable wider employer coverage and capture in-depth information on a range of workplace related aspects.

Surveys at four points in time are planned for implementation between November 2013 and May 2015[7]. Of the four surveys, two are comprehensive business and workplace surveys measuring business confidence, innovation and occupational and skills demand. They will be administered in November of each year (and repeated annually).

The two short format employer surveys conducted in May each year will supplement the larger surveys and have been designed to capture change in employer sentiment. Data obtained from these will be used to construct a Workplace Futures Index (WFI) to be updated every six months.

The surveys will primarily be implemented as Computer Assisted Telephone Interviews (CATI), conducted for the University of Adelaide by Harrison Research Inc., a professional market research company.

Wave 1 of the survey was completed in November 2013. Notification about the survey was sent to selected organisations prior to the telephone interviews. This provided relevant information including the purpose of the survey, who was conducting the

[6] It should be noted that the first wave of the WFS was implemented just prior to the announcement (on 12 December 2013) that GM Holden will cease operations in Elizabeth in 2017. Modelling of the impact of closure on the region and wider State economy indicates that in excess of 12,000 jobs and 700 business establishments are dependent upon the GMH operations (Burgan and Spoehr 2013).
[7] The current Stretton Centre program is due for completion at end of June 2015.

research, who would conduct the interviews and privacy issues. The notification also stated that participation was voluntary and provided a means for organisations to opt out of the survey.

2.1.1 Survey instruments

The main survey instrument is comprised of two broad modules;

- *Workplace Futures Index module*: administered every 6 months
- *Long format workplace futures module*: administered annually

Workplace futures index module

This module is specifically designed to capture overall business confidence and future outlook as well as factors that affect organisational performance and propensity to innovate. The topics covered include:

- Organisational details;
- Business confidence;
- Factors affecting business performance;
- Improving organisational performance; and
- Innovation and response to change.

Long Format Workplace Futures module

This module gathers detailed information on recruitment, training and demand for skills by employers within the region. The topics in this section include:

- Vacancies and recruitment;
- Employing locally;
- Skill gaps and up-skilling;
- Workforce training and development; and
- Barriers to training.

2.2 Sample framework

2.2.1 Sample design

The sample of establishments in the Cities of Playford and Salisbury was drawn from the *Sensis Business Database* which is a comprehensive directory of registered businesses across Australia. The database included a number of establishments (approximately 34% of the total) which had no industry classification. These observations were retained in the sampling framework and were classified under the 'other' industry category.

The primary sampling unit for the surveys is the 'establishment'[8] which will form a panel of workplaces over a two year period from November 2013 to May 2015. The reference population includes any establishment or organisation employing two or more workers located in the Cities of Playford and Salisbury equating to around one-third of businesses in the region[9]. Note that approximately 68% of Playford and 65% of Salisbury establishments were sole owner-operated or did not employ two persons and were therefore not included in this survey.

The sample is selected using a two-staged stratified random sampling approach based on industry (according to ANZSIC codes)[10] and size of establishment in the region. Within each city, the sample is selected in proportion to the number of businesses operating in each industry, and the size of the establishment determined by the number of people

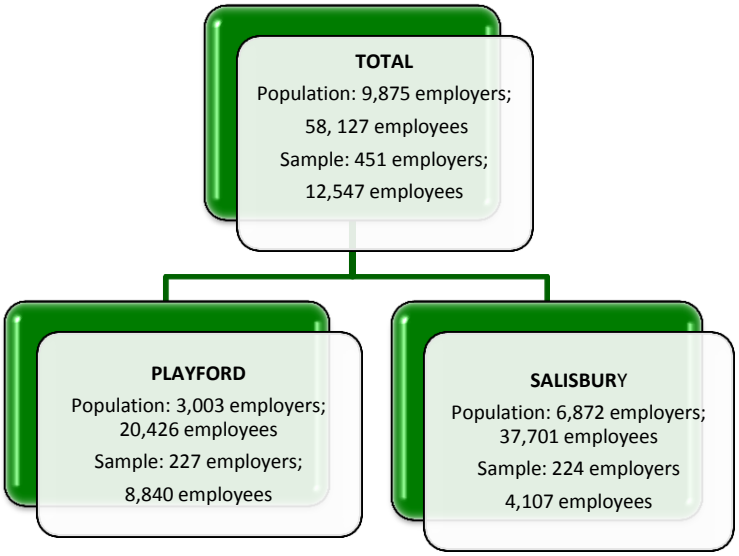
[8] Throughout the report, the terms establishment, organisation and employer are used interchangeably to minimise repetition and improve readability.
[9] All reported data and results in this report refer to enterprises with two or more employees.
[10] Australia and New Zealand Standard Industrial Classification (ANZSIC) codes (Australian Bureau of Statistics, 2013b)

working in them. Hence the sample is intended to be representative of employers within the two local government areas[11]. The sample design also incorporates over-sampling of the manufacturing and health care and social assistance[12] industries, as sectors of special interest within this region. Relevant industry weights are calculated and applied in the analysis[13].

The WFS is designed to assess employer sentiment, recruitment and training and workforce practices of establishments in Playford and Salisbury with at least two people employed. Wave 1 of the WFS comprised 451 establishments in the Cities of Playford and Salisbury with a response rate of 12.5%. A total of 12,547 people worked within surveyed establishments. Figure 3 below illustrates the distribution of the population and sample within each location[14].

While the number of employers interviewed in each location is similar (227 in Playford and 224 in Salisbury), the Playford sample has more than twice the number of employees within these establishments than in Salisbury. This is explained by the inclusion of two large organisations (a hospital and a tertiary education institute) in the Playford sample which together account for approximately 3,000 employees.

FIGURE 3: POPULATION AND SAMPLE DISTRIBUTION



[11] Note, that some findings are extrapolated from the sample to the population and presented in the report. These are shown to provide a regional context, and should be interpreted with caution.
[12] Health care and social assistance is referred to as 'health care' in this report.
[13] Employment weights are based on ABS Census (2011), and establishment weights are based on the *Sensis* business data for Playford and Salisbury. While all reasonable care has been in their calculation, the figures presented should be interpreted only as indicative.
[14] The reference employee population is based on employment by industry data from the ABS Census of 2011.

2.3 Survey time-frame

The surveys will be implemented between November 2013 and May 2015 as described in Figure 4. There will be two waves of the Workplace Futures Survey and four waves of the Workplace Futures Index Survey.

Figure 4: Survey components and proposed time-frame

3 Employers and employees

- Almost one half of establishments were small businesses (those employing 2-4 workers), accounting for around 4,700 businesses in the region.
- Around 60% of employers (approximately 5,600 in the region) experienced no change in the size of their workforce over the 12 months to November 2013.
- Approximately 64% of total employees were employed full-time (accounting for 36,500 workers).
- Apprentices accounted for only 1% of employees.

This section will explore the different aspects of establishments and their employees including:

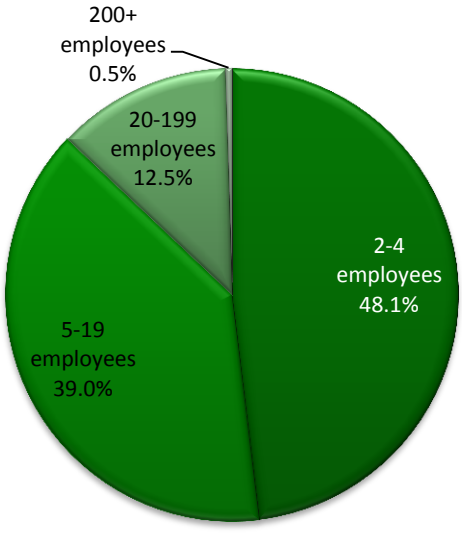
- Size of establishments (number of employees – at November 2013 and November 2012)
- Employment types within organisations (full-time/part-time, casual, apprentices)
- Employing locally

3.1 Size of establishments

Number of employees at November 2013

The employer landscape in the region is dominated by small establishments. This is reflected in the sample with 48% of establishments being very small having 2 to 4 people on the payroll including working proprietors. A further 39% have between 5 and 19 staff, and 13% employ 20 to 199 staff. Less than one percent (0.5%) of responding establishments had more than 200 employees (see Figure 5, also see Table 1 in Appendix A).

FIGURE 5: DISTRIBUTION OF ESTABLISHMENTS (%) BY NUMBER OF EMPLOYEES AT NOVEMBER 2013

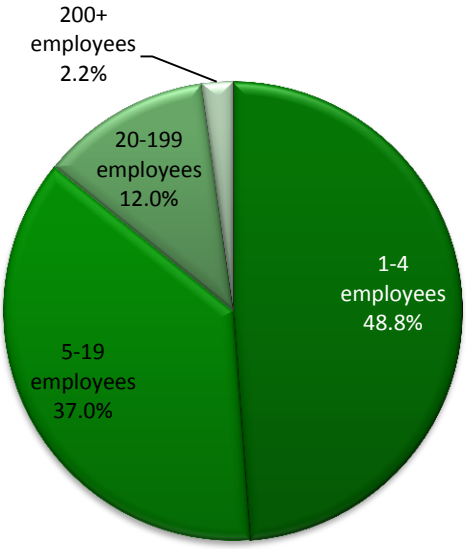


Weighted base=9,875 employers; unweighted base =451employers

NUMBER OF EMPLOYEES AT NOVEMBER 2012

Employers were asked to report on the number of staff employed at November 2012 (ie twelve months earlier; see Figure 6, also see Table 2 in Appendix A). Approximately 4% of establishments did not know the number of employees 12 months ago. Nearly one half of establishments had between one and four employees at November 2012. The proportion of employers with 5 to 19 employees at this time was 37% (compared to 39% when completing the survey). The proportion of employers with 20 to 199 employees remained at 12% over the year.

FIGURE 6: NUMBER OF EMPLOYEES AT NOVEMBER 2012 (% OF EMPLOYERS REPORTING EMPLOYEES AT NOVEMBER 2012)

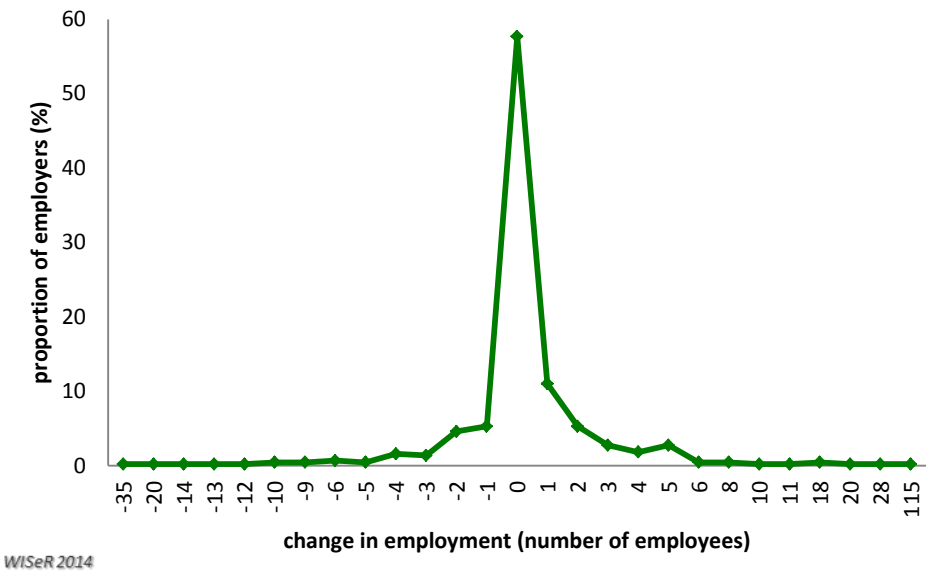


Weighted base=5,812 employers; unweighted base =435employers

The patterns of change in the number of employees within organisations are illustrated in Figure 7. The large majority of establishments (58%) did not experience any change in the number of employees during the 12 months leading up to November 2013. Sixteen

percent reported a decrease in the number of employees, while the remaining 26% experienced growth in the number of staff employed during the year.

FIGURE 7: CHANGE IN EMPLOYMENT OVER 12 MONTHS



Weighted base=9,703 employers; unweighted base =435employers

3.2 EMPLOYMENT TYPES

The nature of employment types within organisations is explored in this section, including the distribution of full-time/part-time, casual and apprentice employees.

Approximately 63% of total employees were employed full-time (accounting for more than 36,500 staff in Playford and Salisbury). Eighteen percent of employees were part-time (almost 11,000 employees in the region), with a similar proportion employed on a casual basis (18% of total employment, accounting for another 11,000 employees). Only 1% of total employees were apprentices.[15]

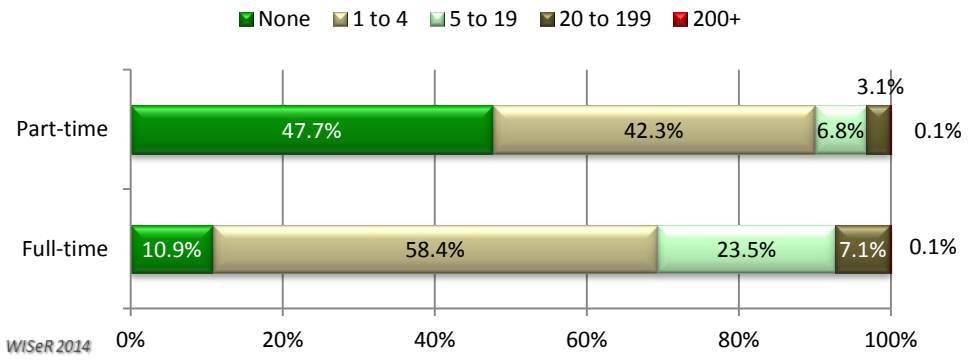
FULL-TIME AND PART-TIME EMPLOYEES

Figure 8 illustrates the distribution of full-time and part-time employees in organisations. Nearly 60% of establishments had between 1 to 4 full-time employees, while almost a quarter had between 5 and 19 full-time employees. Only 7% had more than 20 full-time employees in their organisations. Just over one in ten employers (11%) had no full-time employees at the time of the survey. For more information see Table 3 in Appendix A.

In terms of part-time employment, almost one half of establishments (48%) did not employ part-time workers. Another large proportion (42%) had between 1 to 4 part-time employees. Around 7% of employers had between 5 to 19 part-time employees, while just over 3% had more than 20 staff.

[15] These employment types are not mutually exclusive as some employees may be on multiple employment types. Therefore the proportions do not add up to 100.

FIGURE 8: FULL-TIME AND PART-TIME EMPLOYEES IN ORGANISATIONS (% OF EMPLOYERS)

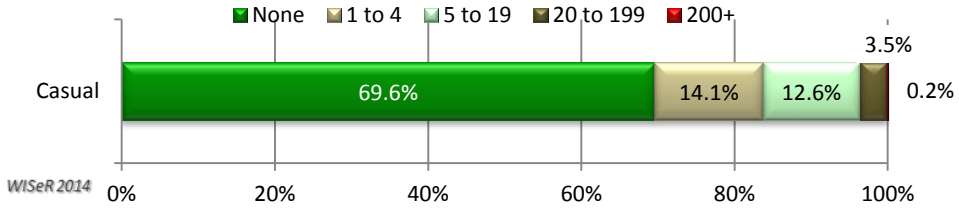


Weighted base=9,868 employers; unweighted base =449employers

CASUAL EMPLOYEES

As Figure 9 shows the vast majority (70%) of employers did not employ any casual staff at the time of the survey. Fourteen percent of employers had between 1 to 4 casual staff, while a further 13% had between 5 to 19 casual staff employed. Almost 4% had more than 20 employed on casual contracts.

FIGURE 9: DISTRIBUTION OF CASUAL EMPLOYEES WITHIN ESTABLISHMENTS (% OF EMPLOYERS)

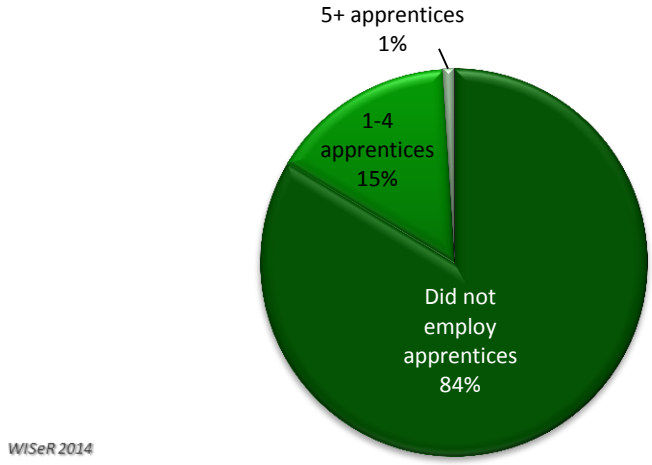


Weighted base=8,801 employers; unweighted base =408 employers

APPRENTICES

The employment of apprentices by establishments in Playford and Salisbury is minimal with the majority (84%) not employing any apprentices (see Figure 10). Around 15% employed between 1-4 apprentices, while only 1% of establishments employed more than 5 apprentices.

FIGURE 10: DISTRIBUTION OF APPRENTICES WITHIN ESTABLISHMENTS (% OF EMPLOYERS)



Weighted base=9,875 employers; unweighted base =451employers

3.3 EMPLOYING LOCALLY

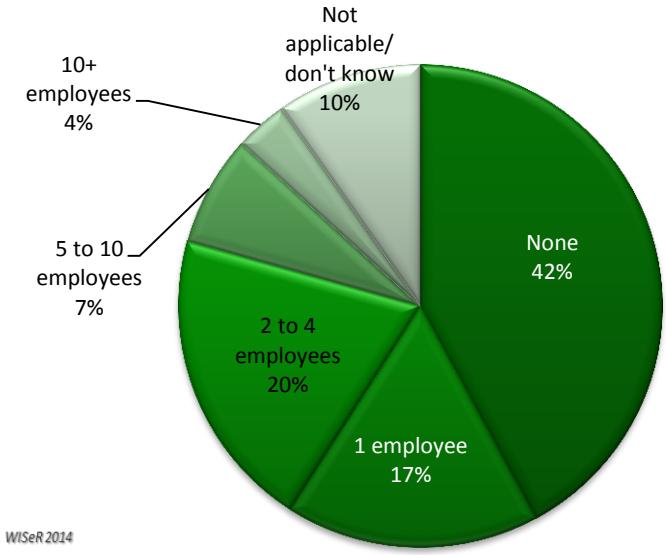
- The employment of local people by local establishments was low.
- Nearly 70% of employers indicated that hiring local people was desirable or very desirable. However, nearly one half of employers had no staff living within 5km of the workplace at the time of the survey.
- Approximately 40% of small to medium size establishments (with 2 to 19 employees) employed between 1 and 4 locals.
- One in five employers did not think that local people had the skills they needed, while 36% indicated that local people did not have sufficient work experience.

Given the high unemployment levels in the northern Adelaide region, it is particularly important to ascertain the role of local employers in hiring local labour. This section examines the distribution of people working and living locally and employer perceptions about hiring local people.

NUMBER OF EMPLOYEES LIVING WITHIN 5 KM OF WORKPLACE

As Figure 11 illustrates, a large proportion of establishments (42%) had no local employees (ie those living within 5 km of the workplace). Seventeen percent of employers had one local employee, while a further 20% had between 2 to 4 employees living within 5 km of their workplace. Seven percent of employers reported between 5 and 10 local employees, while only 4% had more than 10 living within the local area. Also see Table 4 in Appendix A.

FIGURE 11: NUMBER OF EMPLOYEES LIVING WITHIN 5KM OF WORKPLACE (% OF EMPLOYERS)

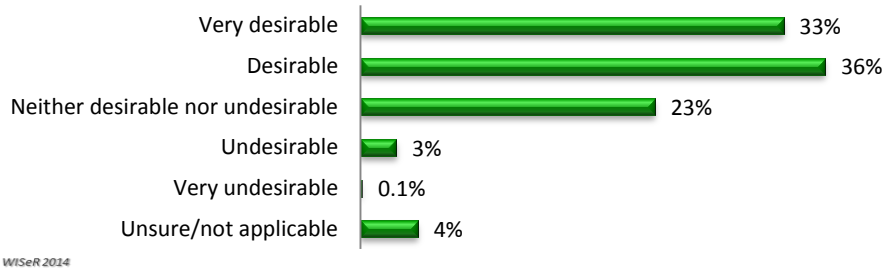


Weighted base=9,875 employers; unweighted base =451employers

EMPLOYING LOCAL PEOPLE

Employer perspectives about hiring local people are presented in Figure 12 (also see Table 5 in Appendix A). Over two-thirds of employers reported that hiring local people was desirable or very desirable (36% and 33%, respectively). Almost one quarter (23%) were indifferent to hiring local people, while very few (3%) indicated it as undesirable or very undesirable.

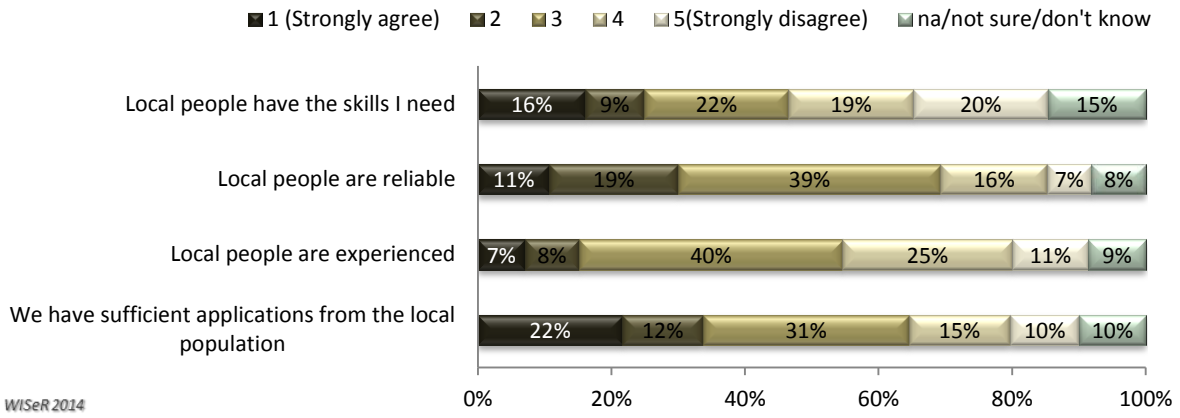
FIGURE 12: EMPLOYER RATING OF HIRING LOCAL PEOPLE (% OF EMPLOYERS)



Weighted base=9,875 employers; unweighted base =451employers

Employer decision factors relating to hiring local people are rated in Figure 13 (also see Table 6 in Appendix A), where ratings range from 1 (strongly agree) to 5 (strongly disagree). Although employing locally was seen to be desirable, more than a third of employers (39%) indicated that local people did not have the skills they needed, or lacked experience (36%). Many employers were also uncertain that local people were appropriately experienced (40%). Lack of local applicants did not appear to be an issue for a third of employers (34%), with only a quarter of employers (25%) indicating the number of local applicants were insufficient. Local people were considered reliable by 30% of employers, although almost a quarter (23%) indicated they were not.

FIGURE 13: HIRING LOCALLY: EMPLOYER DECISION FACTORS (% OF EMPLOYERS)



Weighted base=9,875 employers; unweighted base =451employers

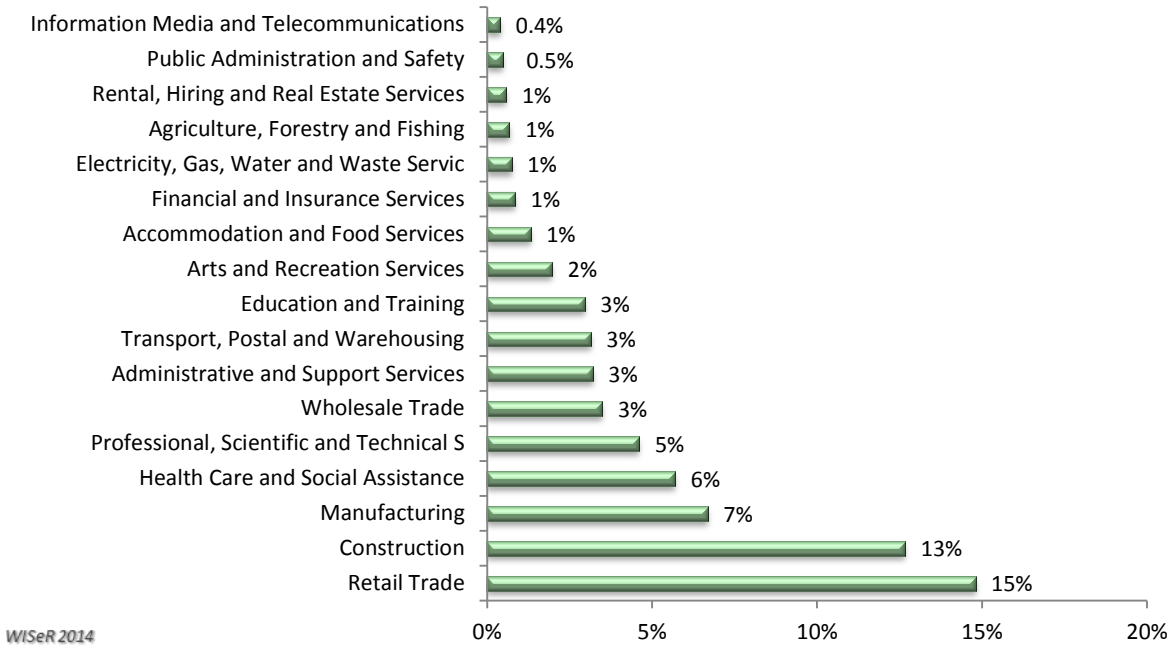
3.4 INDUSTRY DISTRIBUTION

- Retail and construction were the dominant industries in the cities of Playford and Salisbury in terms of the number of establishments.
- Manufacturing industry was the biggest employment provider, contributing around 20% of employment (accounting for almost 12,500 employees) in the region.
- Around 30% of manufacturing establishments were very small, employing between 2 to 4 employees, while 46% employ between 5 and 19 staff.
- The retail trade sector employed 13% of the workforce in the region.

As previously indicated, establishments are classified based on their main activity using the Australia and New Zealand Standard Industrial Classification (ANZSIC) codes. Figure 14 illustrates the distribution of industries[16] within the cities of Playford and Salisbury at the time of the survey (also see Table 7 in Appendix A). Retail trade (15%) and construction (13%) were the most prevalent industries within this region, followed by manufacturing (7%), health care (6%) and professional services (5%). As noted in Section 2.2, approximately 34% of establishments in the population framework had no industry classification. The 'other' services category which also contains those that are not defined is not included in the figure for clarity of presentation.

[16] The distribution of industries presented here is based on listings available in the *Sensis* database.

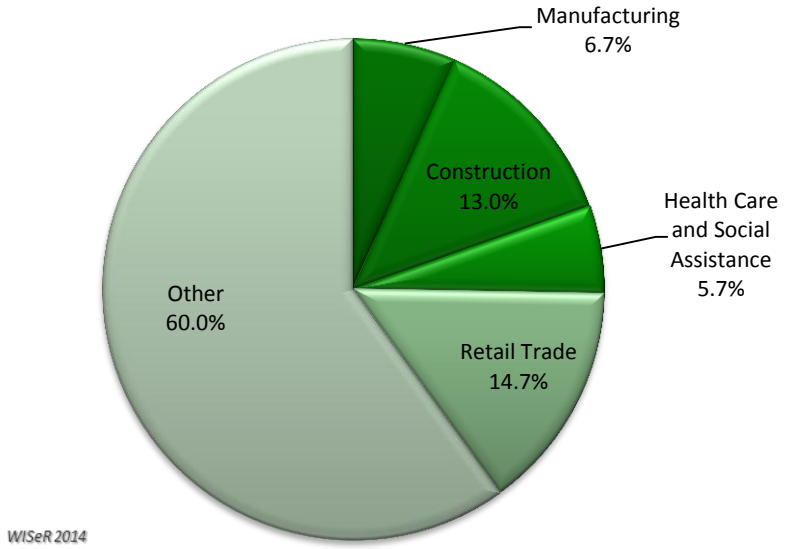
FIGURE 14: INDUSTRY DISTRIBUTION – ALL INDUSTRIES (% OF EMPLOYERS)



Base: All employers (weighted=9,875; unweighted=451)
Note, does not include 'other services'.

For analytical purposes, industries have been classified into five broad categories (see Figure 15, also see Table 8 in Appendix A) to capture the 'industries of interest' in the region. Manufacturing, construction, healthcare and social assistance and retail trade – are presented in the figure, with all other industries combined into the 'other' category.

FIGURE 15: INDUSTRY DISTRIBUTION – GROUPED (% OF EMPLOYERS)



Base: All employers (weighted=9,875; unweighted=451)

4 Organisational planning and performance

- Approximately one in two employers reported having an annual performance review as well as a formal written job description for all of their workers.
- More than one in four employers did not conduct an annual performance review or have a formal written job description for any of their workers.
- While 70% of employers had a business plan, only 29% had a workforce plan.

The WFS includes questions that capture a range of organisational characteristics including business and workforce planning and training and development. They include:

- Proportion of employees with a formal written job description
- Proportion of employees with an annual performance review
- Employers with a business plan
- Employers with a workforce plan
- Employers who are part of an industry network

These are key factors in enhancing skills and staff development within organisations, and provide an understanding of the extent to which training and business planning is embedded within the culture of the establishment.

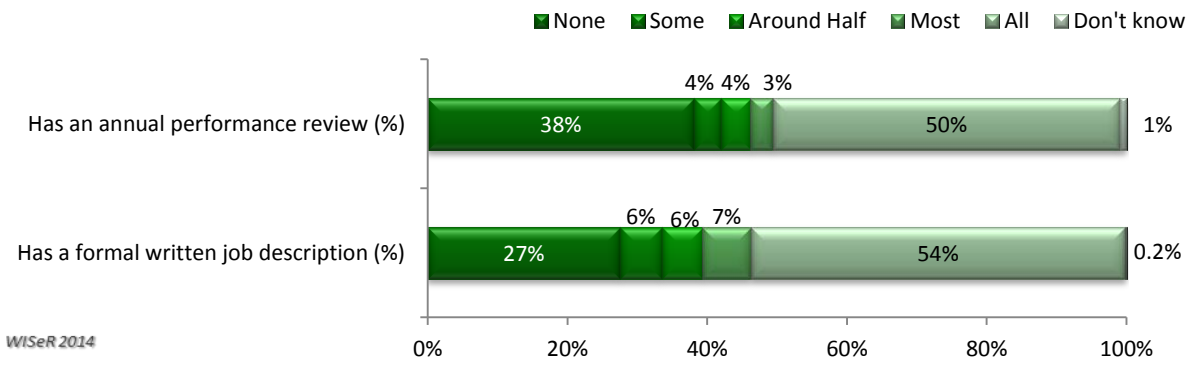
In addition, employers were asked to rate both market and staff factors that would potentially affect their performance.

Job description/ annual performance review

The extent to which employees in establishments have a formal written job description or an annual performance review is shown in Figure 16 (also see Table 9 in Appendix A). Annual performance reviews of employees provide an opportunity to track and monitor staff training, development and skills. While one in two employers in the region undertook annual performance reviews for all of their employees, more than one-third (38%) did none. Four percent of establishments had an annual performance review for most of their employees, with the remaining indicating that some or around half of their employees had a performance review.

Just over half (54%) the employers had a formal written job description for all of their staff, while 7% of establishments had a formal written job description for most of their workers. However, just over one in four (27%) establishments did not have a formal written job description for any employees.

Figure 16: Establishments with job descriptions or performance review (% of employers)

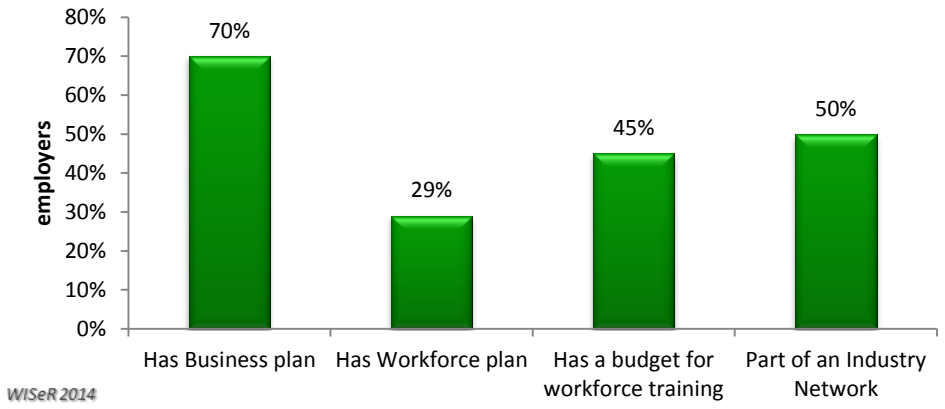


Base: All employers (weighted: 9875; unweighted=451)

Business and workforce planning and industry networking

The majority of responding establishments had a business plan (70%) as illustrated in Figure 17, but less than one third (29%) had a workforce plan. One in two establishments in the region were part of an industry network, and 45% reported they had a budget for workforce training.

Figure 17: Organisational planning (% of employers)



Base: All employers (weighted: 9875; unweighted=451)

Organisational performance factors

Top 5 factors that affect organisational performance:

- ✓ Tax burden
- ✓ Customer demand
- ✓ Competition in the market place
- ✓ Availability of capital
- ✓ Skills shortage

Top 5 factors that improve organisational performance:

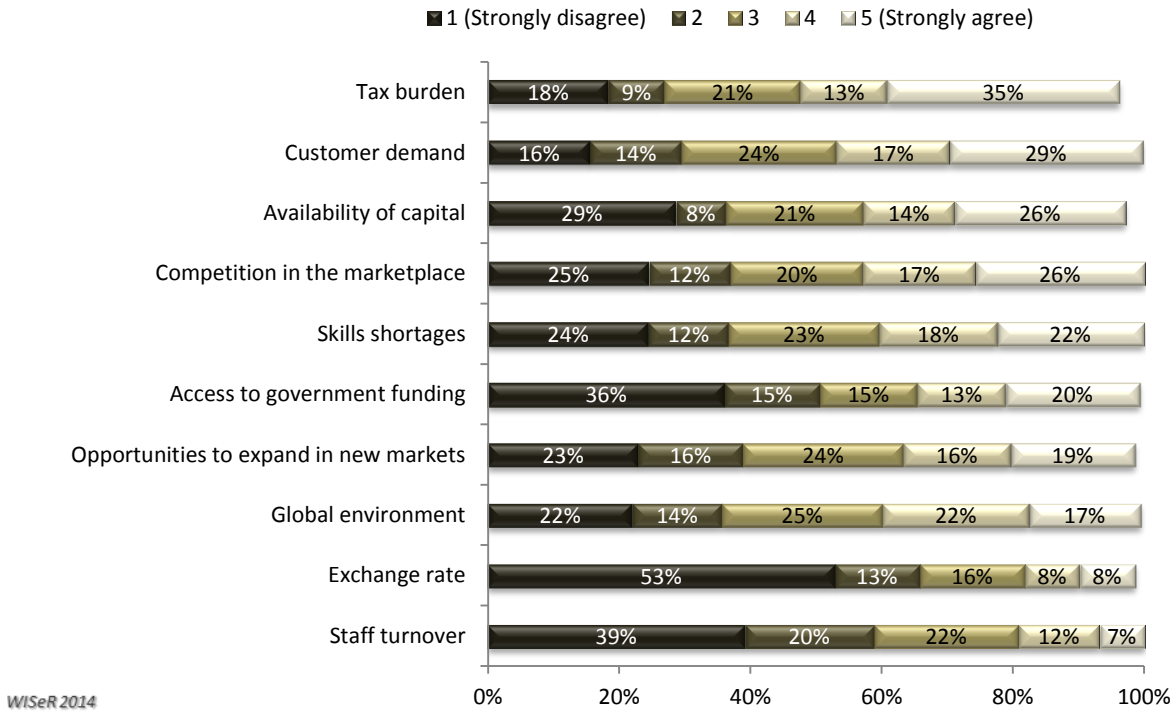
- ✓ Attracting qualified staff
- ✓ Skills development for employees and managers
- ✓ Application of new technology
- ✓ Improving leadership skills within the organisation
- ✓ Employee participation in decision making

Employers were asked to rate a range of market and organisational factors that potentially affect their establishment's performance on a five point scale (see Figure 18). The ratings range from 1 being strongly disagree to 5 being strongly agree. For clarity of presentation, those who were unsure or were not applicable (up to 4%) are not included in the figure. These details are available in Table 10 in Appendix A.

Almost half the employers (48%) agreed that tax burden affected the performance of their enterprise (with 35% strongly agreeing this was an issue), making this the most critical of the listed issues. However, a number of other issues were highly rated by more than 40% of employers – customer demand, availability of capital, competition in the marketplace and skills shortages.

Two-thirds of employers (66%) indicated that the exchange rate did not affect organisational performance (53% strongly agreeing with the statement), while more than half disagreed that staff turnover (59%) or access to government funding (51%) affected their business performance. Responses were fairly mixed with regard to the impact of the global environment and opportunities to expand in new markets.

FIGURE 18: FACTORS THAT AFFECT PERFORMANCE (% OF EMPLOYERS)

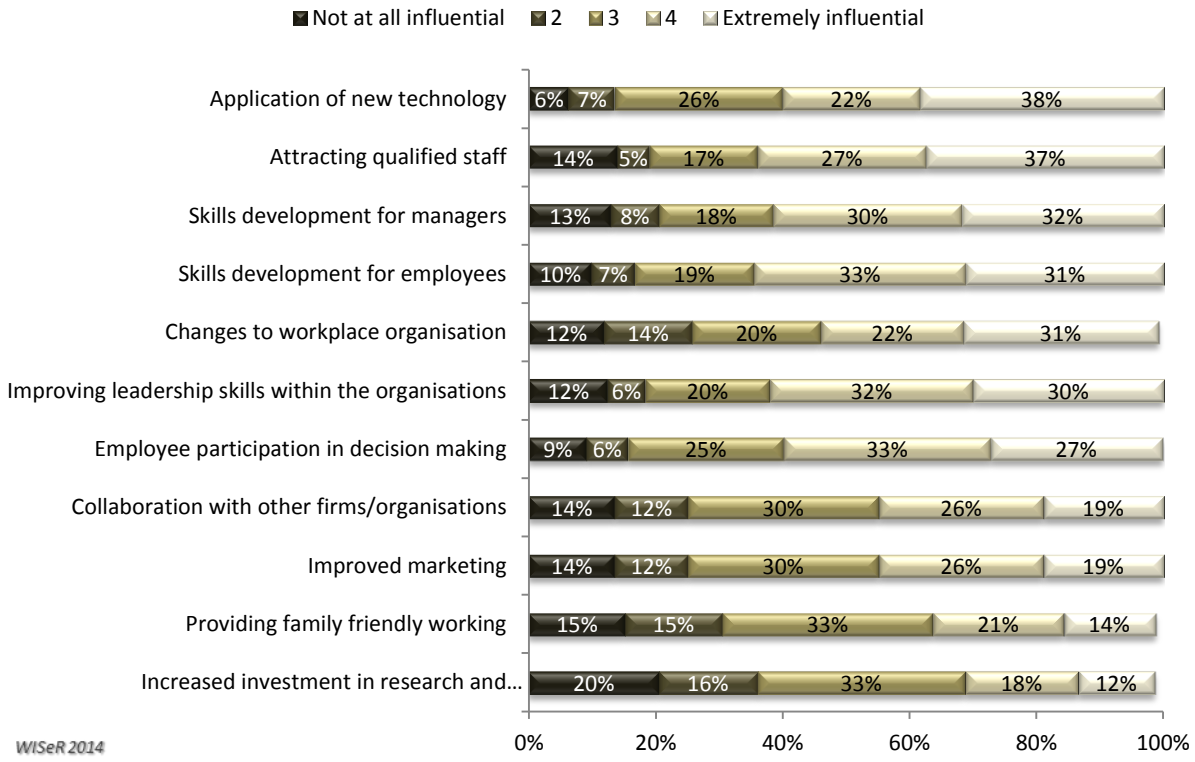


Base: All employers (weighted: 9875; unweighted=451)
Note, not applicable/unsure responses are not shown.

Figure 19 presents employer ratings of factors that influence organisational performance (also see Table 11 in Appendix A). Application of new technology and attracting qualified staff were seen as most influential with 38% and 37% of employers, respectively, rating them as *extremely* influential on their organisation's performance. More than 60% of enterprises indicated skills development for managers and for employees, changes to workplace organisation, improving leadership skills and employee participation in decision making was either extremely or very influential.

Although not endorsed to the same extent as some other activities the positive influence of collaboration with other firms and improved marketing was identified by 45% of organisations, with a third indicating little or no influence from these strategies. Increased investment in research and development and providing a family friendly working environment were considered the least influential activities, with 20% and 15% or employers indicating these were not at all influential. Despite this, one in three employers indicated that increased investment in research and development was extremely or very influential in improving performance.

FIGURE 19: FACTORS THAT ARE INFLUENTIAL IN IMPROVING ORGANISATIONAL PERFORMANCE (% OF EMPLOYERS)



Base: All employers (weighted: 9875; unweighted=451)
Note, not applicable/unsure responses are not shown.

5 COLLABORATION WITH OTHER ORGANISATIONS

The extent to which establishments collaborate with other organisations is captured in Figure 20 where four specific aspects of collaboration are examined (also see Table 12 in Appendix A). They are:

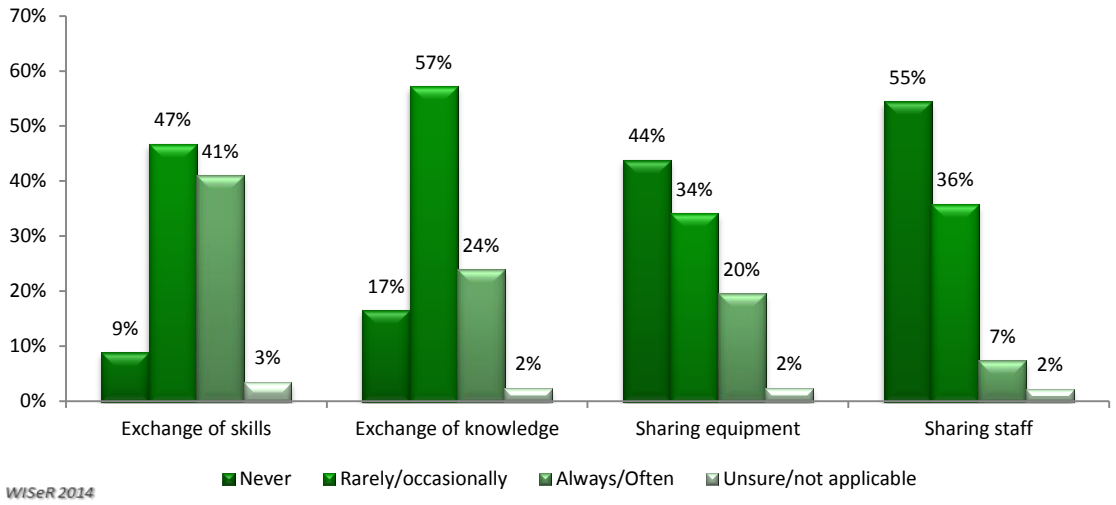
- Exchange of skills
- Exchange of knowledge
- Sharing of equipment
- Sharing of staff

Around four in ten (41%) establishments always or often collaborate through the exchange of skills. Almost one half of establishments (47%) indicated they rarely or occassionaly exchanged skills with other organisations (Figure 20). Nearly one in ten (9%) of establishments reported that they never exhange skills with other organistions.

In terms of exchanging knowledge between organisations, the majority (57%) indicated that this practice was rare or occassional, with a further 17% never exchanging knowledge with other organisations. However, a quarter (24%) reported they often or always exchanged knowledge.

Sharing of equipment or staff is considerably less common, with around half the establishments never sharing equipment or staff (44% and 55% respectively). Approximately one third rarely or occassionally shared equipment or staff. While 20% of all employers often shared equipment, only 7% reported sharing staff to the same extent.

FIGURE 20: COLLABORATION WITH OTHER ORGANISATIONS BY INDUSTRY (% OF EMPLOYERS)



Base: All employers (weighted: 9875; unweighted=451)

6 EMPLOYER SENTIMENT INDICATORS

Business sentiment indicators –industry summary

In most cases business sentiment for employers in the Cities of Playford and Salisbury was optimistic – with more than half expecting increases in investment, business profits, sales and growth in the next 12 months, where more than 60% of:

- **Health care** establishments expected an increase in **intentions to invest** in the next 12 months
- **Retail trade** establishments expected an increase in **business profits** in the next 12 months
- **Retail trade** establishments expected an increase in **sales** in the next 12 months
- **Manufacturing, construction, health care** and **retail trade** establishments expected an increase in **growth** in the next 12 months

Around one-fifth to a third of employers reported no change in their expectations regarding investment, business profits, sales and growth in the next 12 months. However, considerably more – one half to two-thirds – expected recruitment to remain stable over this period.

Few employers were pessimistic expecting a decrease across the five indicators. However, more than 10% of:

- **Construction** and **health care** establishments expected a decrease in **intentions to invest** in the next 12 months
- **Manufacturing** and **construction** establishments expected a decrease in **business profits** in the next 12 months
- **Manufacturing** establishments expected a decrease in **sales** in the next 12 months
- **Manufacturing** establishments expected a decrease in **growth** in the next 12 months

Central to business performance is employer sentiment. The WFS captures five specific dimensions of sentiment which are used to derive a composite Workplace Futures Index (WFI) which will be discussed in a forthcoming report. Employers were asked to rate on a five-point scale[17] their expectations in relation to the following:

- Intentions to invest in the next 12 months
- Intentions to recruit in the next 12 months

[17] The scale ranges from a high of 'strong increase' to a low of 'strong decrease'.

- Expectations for business profits in the next 12 months
- Expectations for sales in the next 12 months
- Expectations for growth in the next 12 months

These indicators[18] are presented in Figure 21 (also see Table 13 in Appendix A). Overall, employers were cautiously optimistic in their intentions to invest in the next 12 months (to November 2014) with 12% expressing a strong increase and a further 40% indicating a moderate increase in their expectation to invest. Approximately 6% of employers expected a moderate decrease while a further 3% expected a strong decrease in their expectation to invest. A little over one third (37%) see no change in the coming year.

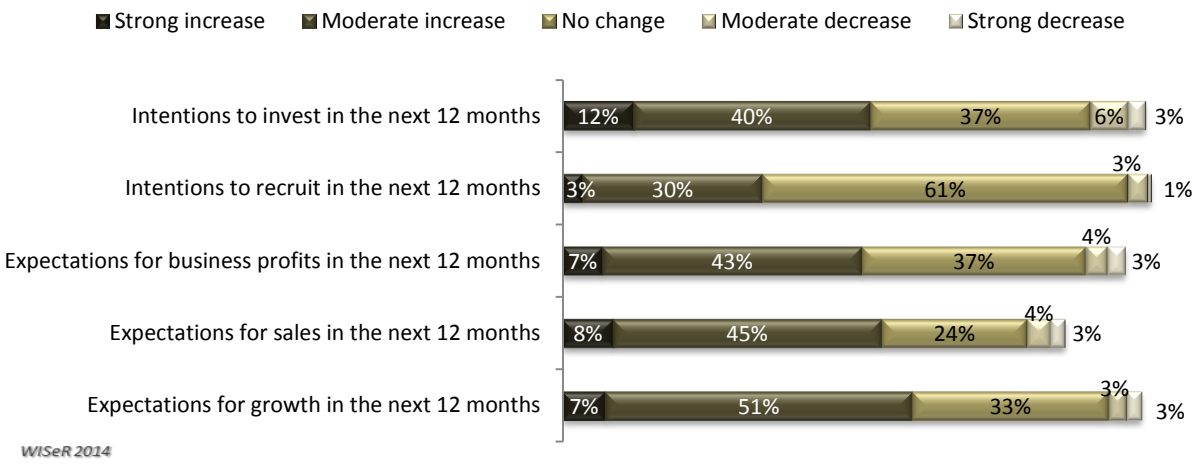
Employers were generally cautious in their recruitment intentions with the majority (61%) indicating no change in recruitment in the 12 months to November 2014. One in three employers see a moderate increase in recruitment, while only 3% of employers see a strong increase.

One half of establishments expected an increase in profits in the following 12 months. Most of them expected a moderate increase in profits (43%), while 7% expected a strong increase. More than one third (37%) of employers were not expecting a change in profits. However, a further 7% expected a moderate or strong decrease in profits in the next year.

In terms of expectations for sales, only 8% of employers expected a strong increase in the next 12 months, while 45% indicated a moderate increase. One in four employers expected no change in sales, while 7% expected a moderate or strong decrease[19]

Employers were relatively optimistic in their expectations for growth with one in two employers expecting moderate business growth and nearly 9% expecting strong growth to November 2014. On the other hand 6% expect a moderate or strong decrease in growth during this period. One in three employers does not expect any change.

FIGURE 21: BUSINESS SENTIMENT INDICATORS AT NOVEMBER 2013 (% OF EMPLOYERS)



Weighted base: 8,613 employers; unweighted base: 399 employers
Note, not applicable/unsure responses are not shown.

[18] For clarity of presentation, those who were unsure/not applicable are not included in the figure. Detailed figures for each category are available in the appendix.
[19] Note that 12% indicated that this question was not applicable to them.

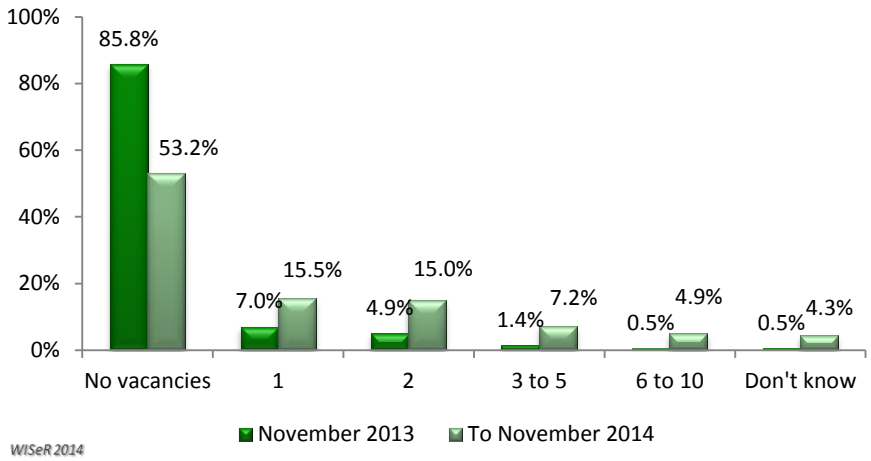
7 VACANCIES AND RECRUITMENT

- The majority of establishments in Playford and Salisbury were *not* intending to recruit new staff, with only 14% reporting a vacancy at the time of the survey.
- Employer reported vacancies in Playford and Salisbury in November 2013 were extrapolated to be almost 1,000.
- Employment density (employment to vacancy ratio) was 1.6%.
- The incidence of vacancies was higher among smaller firms (2 to 20 employees).
- By industry sector, the proportion of establishments reporting vacancies ranges from 1% in electricity, water and gas works to 20% in retail trade.
- More than half of employers anticipated having no vacancies to November 2014.
- Extrapolating from survey responses, around 3,500 vacancies could be expected in Playford and Salisbury during the period November 2013 to November 2014.

This section examines the trends in vacancies and recruitment issues faced by employers. Overall approximately 14% of employers reported having a current vacancy at the time of the survey (see Figure 22, also see Table 14 in Appendix A). Employment density, which reflects the total current vacancies to employment ratio in the sample was 1.6%, equating to almost 1,000 vacancies in Playford and Salisbury in November 2013.[20]

More than half (53%) the enterprises anticipated having *no* vacancies to November 2014. Seven percent of employers expected one vacancy while another 7% expected two or more vacancies in the next year. This would account for approximately 3,500 vacancies expected in Playford and Salisbury from November 2013 to November 2014.

FIGURE 22 : VACANCIES BY ESTABLISHMENT, NOVEMBER 2013 TO NOVEMBER 2014 (%)



Base: All employers (weighted: 9875; unweighted=451)

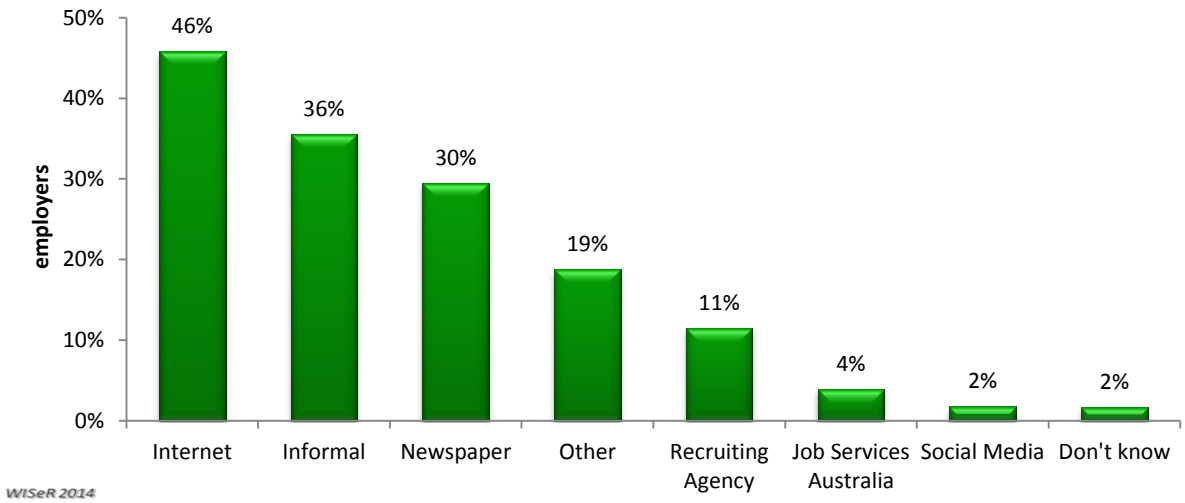
7.1 ADVERTISING PATTERNS

Advertising of employment opportunities by employers provides the first signal of demand for specific skills and occupations. Figure 23 presents the different methods of advertising reported by employers in November 2013 (also see Table 15 in Appendix A). Almost half (46%) used the internet, while one-third (36%) engaged with informal methods (such as word of mouth, friends and colleagues). Just under one-third of employers used newspapers as their usual method of advertising. Other key methods of

[20] Noting that regional estimates are based on survey responses and extrapolated to the Playford and Salisbury employer and employee populations as described in Section 2.2).

advertising utilised by employers in the region include, recruitment agencies (11%), Job Services Australia (4%) and social media (2%). Nearly one in five (19%) used other methods.

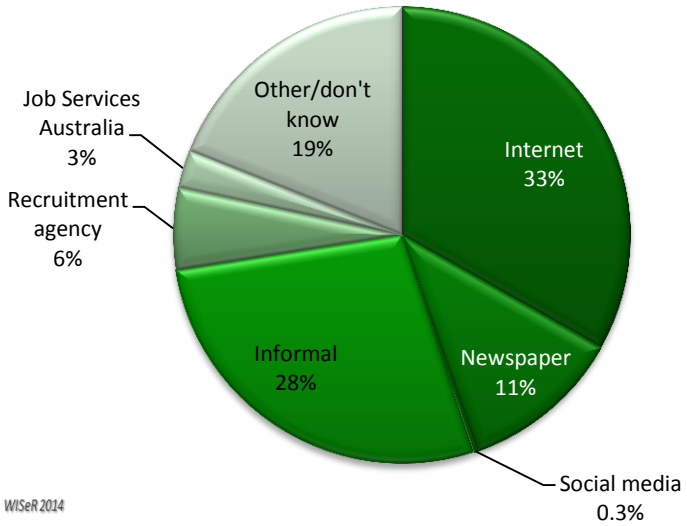
FIGURE 23: USUAL METHODS OF ADVERTISING (% OF EMPLOYERS)



Base: All employers (weighted: 9875; unweighted=451)
Note, multiple responses were possible.

As Figure 24 shows, the internet was the most successful method of advertising among employers (33%) followed by informal methods (28%). The traditional newspaper was the most successful method for 11% of employers (also see Table 16 in Appendix A).

FIGURE 24: MOST SUCCESSFUL METHODS OF ADVERTISING (% OF EMPLOYERS)



Base: All employers (weighted: 9875; unweighted=451)

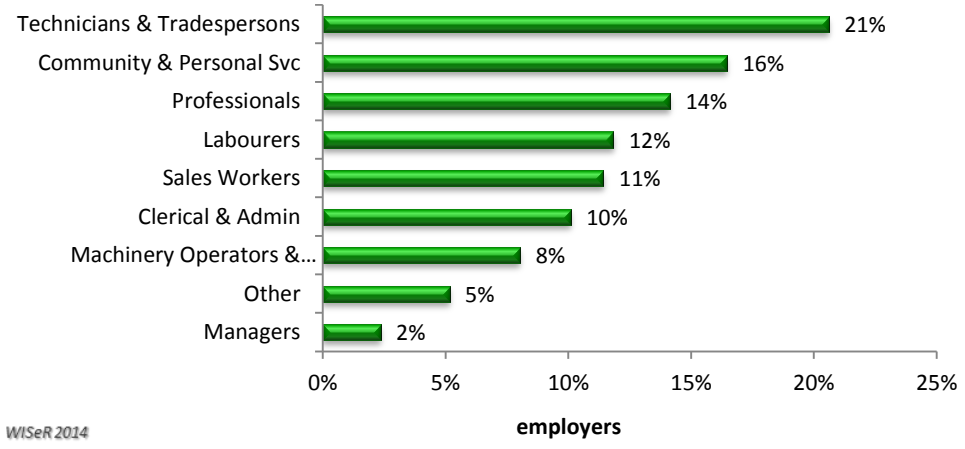
8 Occupational skills demand

- There was a high level of demand – both current and future - for technicians and tradespersons, with around one in 5 employers with a vacancy reporting an opening in these roles.
- The highest demand for these occupations was from small establishments (2-4 employees). By industry sector, the highest demand for them stemmed from the construction industry.
- Eleven percent of employers reported a hard-to-fill vacancy.
- Employers experienced a greater difficulty in filling higher skilled occupations (technicians and tradespersons, professionals, and machinery operators being the top three occupations).
- Attracting experienced and qualified staff was a major issue for employers in the area (reported by 37% and 38% of employers, respectively).
- Low number of applicants with the required skills was the top reason for having a hard-to-fill vacancy.

Occupational skill demand is an important indicator of future demand for specific types of skills and occupations, and serves as a signal for guiding current training and education initiatives. This also provides a means of matching the supply of skills with employer demand in the labour market. Matching the supply and demand of skills is particularly important in the current economic and employment climate in the northern Adelaide region where the impending closure of the GM Holden manufacturing facility is expected to have a significant impact across the labour market.

Fourteen percent of employers indicated they had at least one vacant position in November 2013. Of those employers with a current vacancy, one in five (21%) indicated that they had vacant occupations for technicians and tradespersons (see Figure 25, also see Table 17 in Appendix A). Community and personal services followed with 16% of these employers having a vacancy. Professional occupations were vacant in 14% of these establishments. Vacancies for labourers, sales workers and clerical workers were reported by 12%, 11% and 10%, respectively. However, only 2% of vacancies were in a managerial role.

Figure 25: Vacant occupations at November 2013 (% of employers with vacancies)

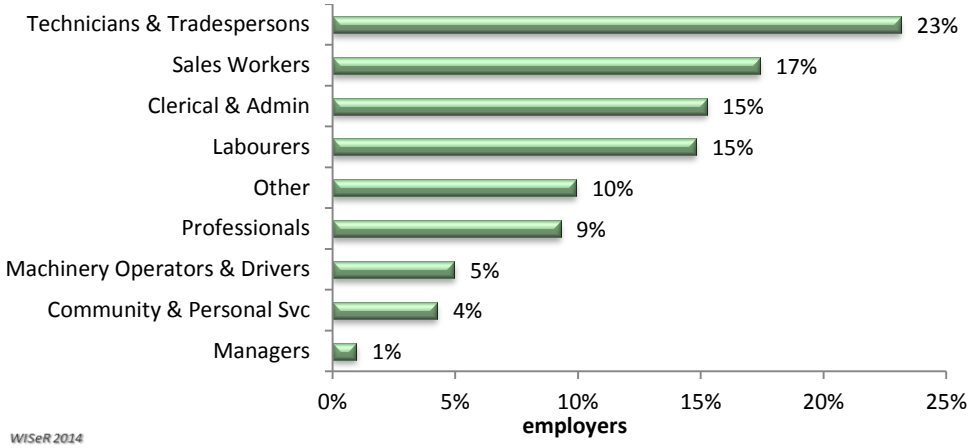


Weighted base: 1,342 employers; unweighted base; 86 employers

Close to one half (43%) of employers anticipated they would have a vacancy in the 12 months to November 2014. Technicians and tradespersons were expected to be the most in demand, with 23% of employers who were expecting a vacancy indicating these occupations would be required (see Figure 26). Seventeen percent of employers indicated a requirement for sales workers in the 12 months to November 2014. Additionally, 15% expected to require clerical and administrative workers and another 15% labourers. Nine percent indicated they would have professional level vacancies in the next 12 months.

There was a relatively low demand for managerial level occupations with only 1% expecting to need managers.

FIGURE 26: OCCUPATIONS REQUIRED TO NOVEMBER 2014 (% OF EMPLOYERS EXPECTING A VACANCY WITHIN 12 MONTHS)

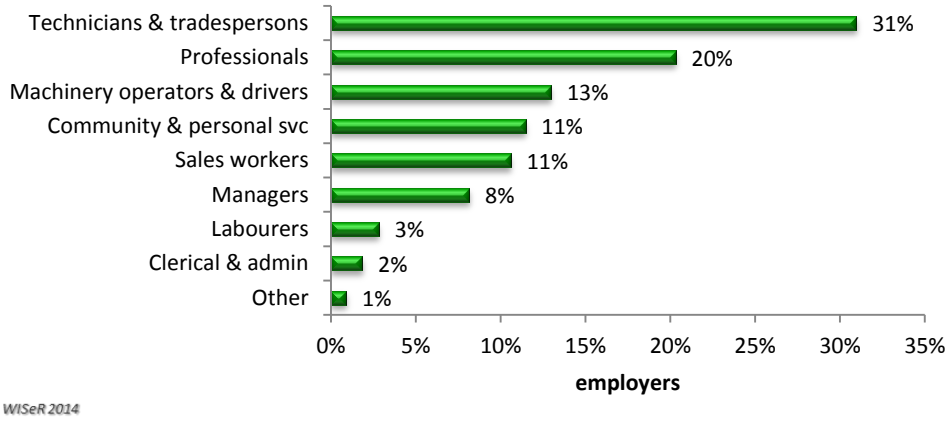


Weighted base: 4,203 employers; unweighted base: 214 employers

8.1 HARD TO FILL VACANCIES

Approximately one in ten employers reported recruitment difficulties in the last year with employers experiencing a greater difficulty in filling higher skilled occupations. As illustrated in Figure 27, technicians and tradespersons were the hardest to fill occupation with nearly one-third of employers with hard to fill vacancies reporting a position in that occupation (also see Table 18 in Appendix A). Professional occupations (20%) were the next hardest to fill. In comparison, there were relatively few hard to fill vacancies in low-skill occupations such as clerical and administrative workers (2%) and labourers (3%). Just over one in ten employers with hard to fill vacancies (11%) reported having recruiting difficulties in sales, managers and community and personal services occupations.

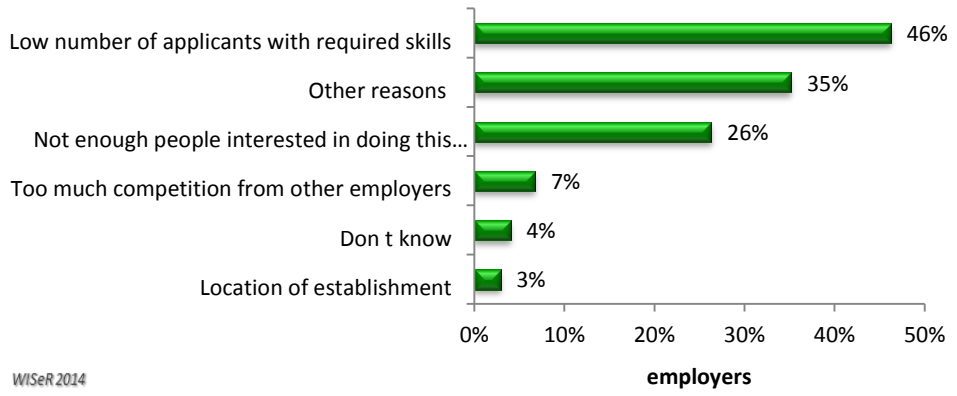
FIGURE 27: HARD TO FILL OCCUPATIONS, NOVEMBER 2013 (% OF EMPLOYERS WITH HARD TO FILL VACANCIES)



Weighted base: 794 employers; unweighted base: 50 employers

Almost half (46%) of employers with hard to fill vacancies cited the low number of applicants with required skills and lack of interest in available work (26%) as the reason for these vacancies (see Figure 28, also see Table 19 in Appendix A). Seven percent reported competition from other employers, while only 3% cited the location of establishment as a factor.

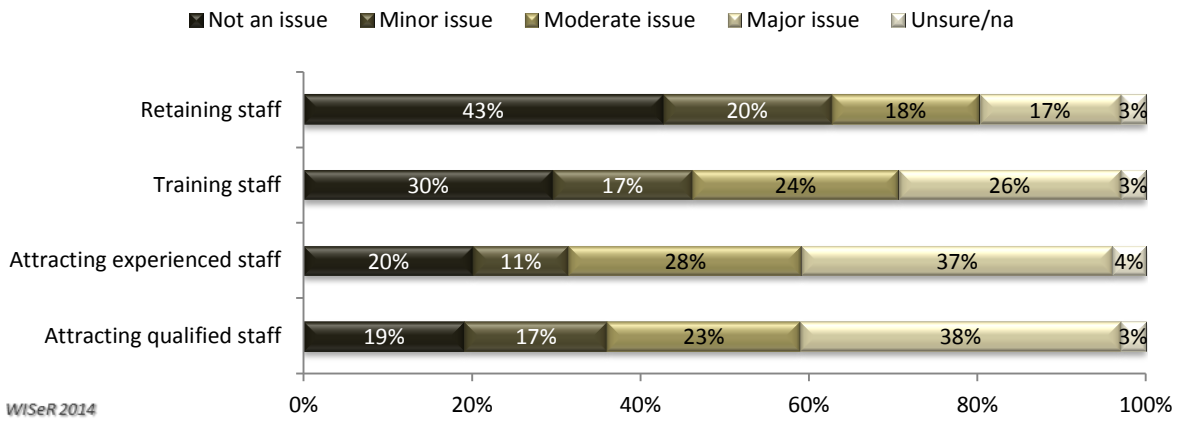
FIGURE 28: REASONS FOR HAVING A HARD-FILL VACANCY (% OF EMPLOYERS WITH HARD TO FILL VACANCIES)



Weighted base: 794 employers; unweighted base: 50 employers
Note, multiple responses were possible

Related to hard-to-fill vacancies is the attraction and retention of qualified and experienced staff (Figure 29, also see Table 20 in Appendix A). Almost two-thirds of employers in the area reported that attracting experienced or qualified staff was a moderate to major issue for them, with 37% and 38%, respectively, indicating this was of major concern. Although attracting the right staff was of some concern, employers had considerably less issue with their ability to retain staff – with this being a minor issue at most for two-thirds (63%) of employers and only 17% indicating it was a major issue. Around half indicated that there were few issues with training staff, although it was identified as a major issue for a quarter (26%).

FIGURE 29: ATTRACTING AND RETAINING STAFF: EMPLOYER RATINGS (%)



Base: All employers (weighted: 9875; unweighted=451)

9 Skill gaps and workforce training and development

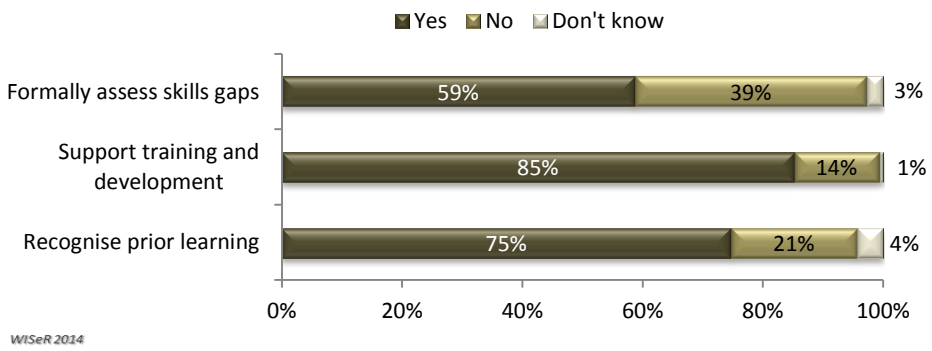
- The majority of employers report that they follow good workforce development and training practices.
- Sixty percent of employers formally assess skill gaps; 85% support training and development, while 75% recognise prior learning.
- The top methods of addressing skill gaps:
  - ✓ Increased training
  - ✓ Mentoring
  - ✓ Staff supervision
- The top usual methods of training:
  - ✓ Learning on the job
  - ✓ Formal training programs
  - ✓ In-house training courses

A range of factors related to workforce training and development were examined in the WFS including:

- Identifying and addressing skill gaps
- Nature and extent of training and development within establishments
- Barriers to training.

Approximately 60% of establishments formally assess skill gaps, 85% support training and development and 75% recognise prior learning (see Figure 30, also see Table 21 in Appendix A).

Figure 30: Identifying skill gaps and up-skilling within organisations (% of employers)

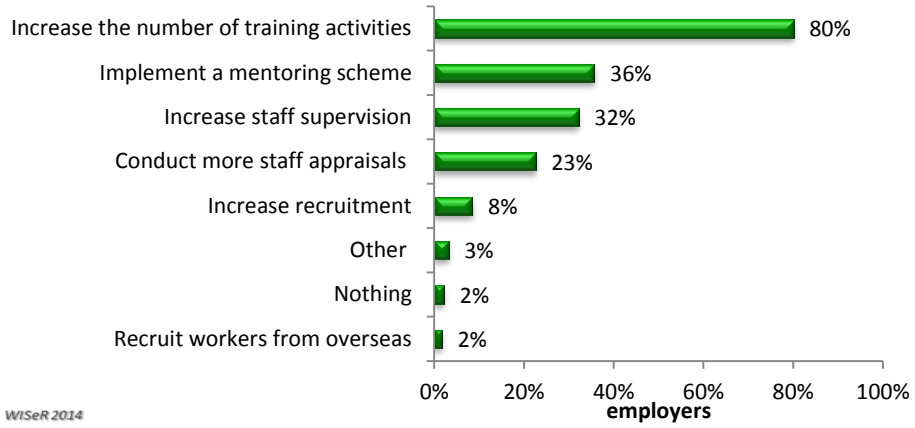


Base: All employers (weighted: 9875; unweighted=451)

9.1 Addressing skills gaps

For those organisations that assess existing skill gaps, methods of addressing these gaps are presented in Figure 31 (also see Table 22 in Appendix A). A large proportion (80%) reported using increased training activities to manage skill gaps. Around one-third (36%) implemented a mentoring scheme or increased staff supervision (32%). Just under one quarter (23%) of these employers conducted more staff appraisals. A small proportion (8%) increased recruitment and 2% reported recruiting workers from overseas – while 2% did nothing.

FIGURE 31: METHODS OF ADDRESSING EXISTING SKILL GAPS BY EMPLOYERS (% OF EMPLOYERS ASSESSING SKILLS GAPS)



Weighted base: 5,800 employers; unweighted base: 265 employers

9.2 TRAINING AND DEVELOPMENT

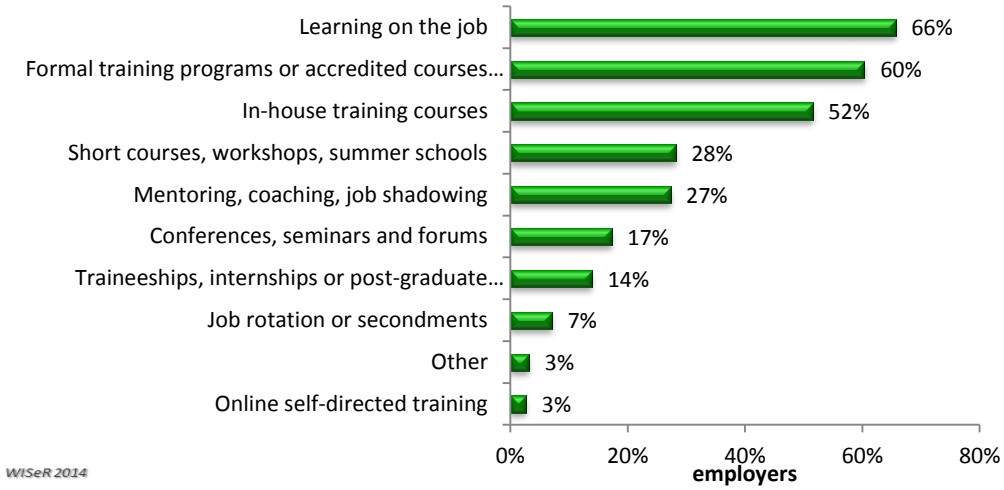
- Six in ten employers reported staff needed to update their skills.
- Overall, 73% of employers reported that they had arranged or funded training for staff in the last 12 months
- Learning on the job and formal training programs are the most used methods of training for the majority of establishments.
- Occupations that will require up-skilling in the next 12 months include:
  - ✓ Skilled trades
  - ✓ Technical/associate professionals
  - ✓ professional
- Specific skills needing improvement in the next 12 months include:
  - ✓ Technical, practical or job-specific skills
  - ✓ General IT user skills
  - ✓ Problem solving skills
- Around one half of employers stated that their employees are fully proficient.
- Training not being available locally was a barrier for more than one quarter of employers.

The extent and nature of employer investment in staff training and development are explored in this section. Overall, 73% of employers[21] claimed that they either arranged or funded a training and development program for their employees in the 12 months to November 2013.

Employer approaches to staff training and development are illustrated in Figure 32 (also see Table 23 in Appendix A). The most prevalent approach is learning on the job (66%), followed by formal training programs (60%) and in-house training (52%). Only 3% of employers used online self-directed training.

[21] Representing approximately 8,500 employers in the area providing training and development from November 2012 to November 2013.

FIGURE 32: USUAL METHODS OF TRAINING (% OF EMPLOYERS ENGAGED IN TRAINING)

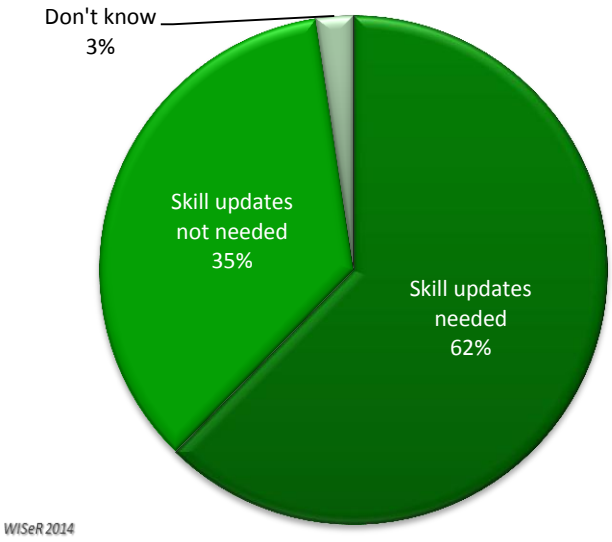


Weighted base: 8,413 employers; unweighted base: 388 employers

9.3 UP-SKILLING

Requirements for skill updates and up-skilling are discussed in this section. Almost two-thirds (62%) of employers indicated they expected staff to require up-skilling before November 2014 (Figure 33).

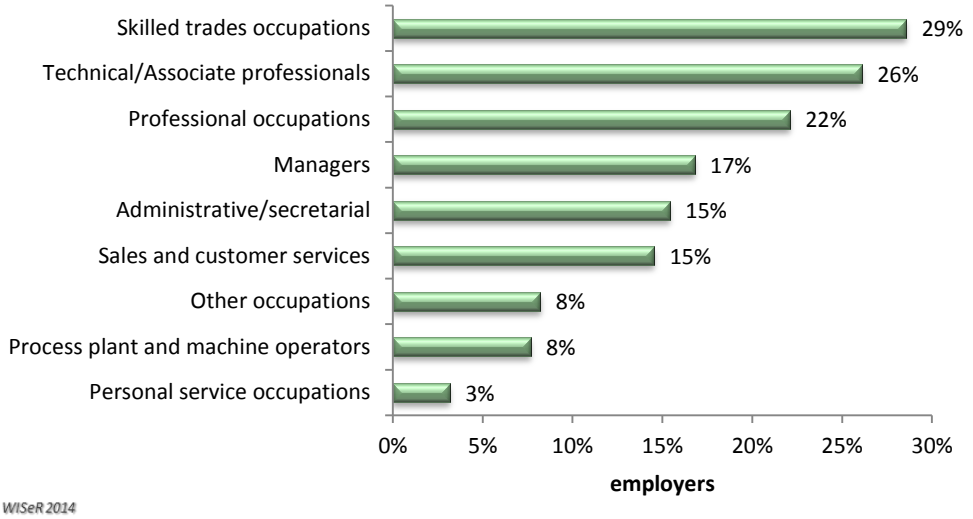
FIGURE 33: EMPLOYEE UP-SKILLING REQUIREMENTS TO NOVEMBER 2014 (% EMPLOYERS)



Base: All employers (weighted: 9875; unweighted=451)

All listed occupations were identified by at least some employers as requiring up-skilling in the next year (Figure 34, also see Table 24 in Appendix A). Skilled-trades occupations were the most in need of up-skilling, with 29% of employers who needed skill-updates indicating that their staff in these occupations required up-skilling. Other occupations with significant up-skilling needs were technical and associate professional (26%), professionals (22%) and managers (17%).

FIGURE 34: OCCUPATIONS THAT WILL REQUIRE UP-SKILLING TO NOVEMBER 2014 (% OF EMPLOYERS WITH STAFF REQUIRING UP-SKILLING)

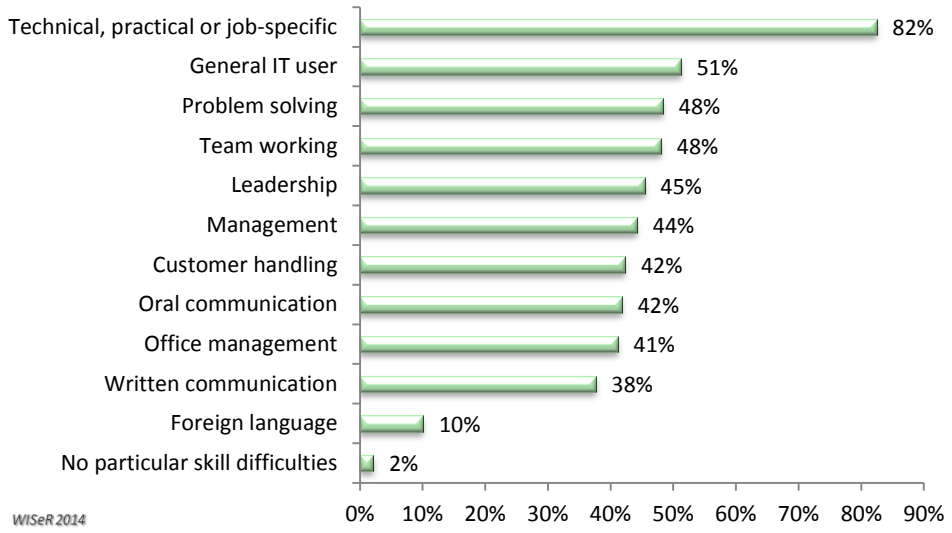


Weighted base: 6,155 employers; unweighted base: 290 employers

In terms of specifc skills that need improving, as Figure 35 illustrates, 82% of employers with staff requiring up-skilling indicated a need for improvement in technical or practical skills (also see Table 25 in Appendix A). Just over one in two (51%) employers reported a need for improvement in general IT user skills.

In addition, skills in problem solving (48%), team working (48%), leadership (45%), management (44%), customer handling (42%), oral communication (42%) and office management (41%) were also identified as requiring improvement in the coming year. Only 2% of employers reported having no skill difficulties.

FIGURE 35: SKILLS THAT NEED IMPROVING IN THE NEXT 12 MONTHS (% OF EMPLOYERS WITH STAFF REQUIRING UP-SKILLING)



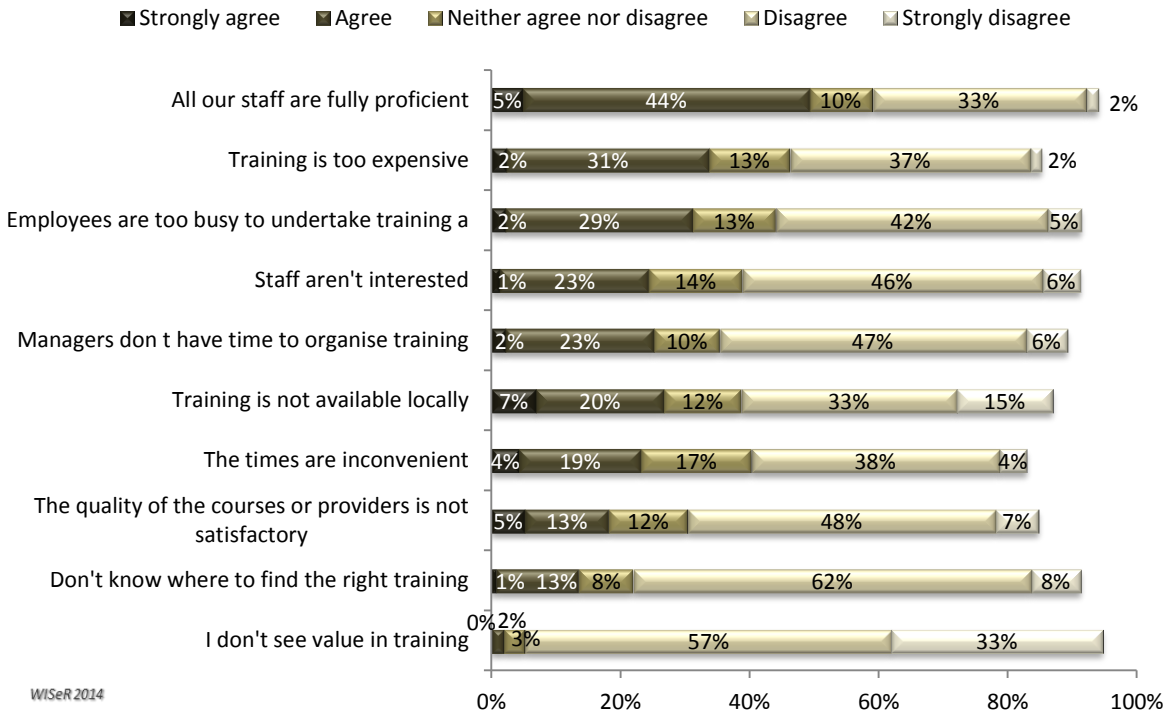
Weighted base: 6,155 employers; unweighted base: 290 employers

9.4 Barriers to training

Employer attitudes and approach to training are captured in Figure 36 which illustrates barriers to training (also see Table 26 in Appendix A). The overwhelming majority (90% of employers) see value in training their employees. Just around one half (49%) reported that their staff were fully proficient (and therefore did not need training).

Training was felt to be too expensive for one-third (33%) of employers, with a similar proportion feeling their employees were too busy for training (31%). In most cases, employers reported that staff were interested in training (52%) and managers did have time to organise it (53%) – although one quarter disagreed. More than half also felt the quality of the courses was satisfactory (55%), with only 18% disagreeing. Most employers (70%) indicated they knew where to find the right training, although the lack of local training was seen as a barrier for a quarter (27%).

Figure 36: Barriers to training (% of employers)



Base: All employers (weighted: 9875; unweighted=451)
Note: Figures do not add up to 100% as employers who were unsure or not applicable are not included in the figure for clarity. They are available in the appendix.

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Appendix A. Data tables

Table 1: Distribution of establishments (%) by number of current employees

Number of employees	Percent
2-4 employees	48.1
5-19 employees	39.0
20-199 employees	12.4
200+ employees	0.5
Total	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 2: Distribution of establishments (%) by number of employees November 2012

Number of employees November 2012	Percent
1-4 employees	48.8
5-19 employees	37.0
20-199 employees	12.0
200+ employees	2.2
Total	**100**

Base: All employers (weighted=5,812; unweighted=435)

Table 3: Employment type distribution (% of establishments)

Unweighted base (employers)		*451*		*410*
Weighted base (employers)		*9,875*		*8,809*
	Full-time	**Part-time**	**Apprentice**	**Casual**
None	10.9	47.7	83.6	69.6
1 to 4	58.4	42.3	15.5	14.1
5 to 19	23.5	6.8	0.9	12.6
20 to 199	7.1	3.1	0.0	3.5
200+	0.1	0.1	0.0	0.2
Total	**100**	**100**	**100**	**100**

Table 4: Number of employees living within 5kms of workplace (% of establishments)

Number of employees	Percent
None	42.1
1 employee	17.0
2 to 4 employees	20.3
5 to 10 employees	7.4
10+ employees	3.5
Not applicable/don't know	9.7
Total	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 5: Employer rating of hiring local people (% of employers)

Employing staff locally	Percent
Very desirable	33.1
Desirable	36.4
Neither desirable nor undesirable	23.1
Undesirable	2.8
Very undesirable	0.1
Unsure/not applicable	4.4
Total	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 6 Hiring locally: Employment decision factors (% of employers)

	1 (Strongly agree)	2	3	4	5 (Strongly disagree)	Not sure/ na/ don't know
Local people have the skills I need	16	9	22	19	20	15
Local people are reliable	11	19	39	16	7	8
Local people are experienced	7	8	40	25	11	9
We have sufficient applications from the local population	22	12	31	15	10	10

Base: All employers (weighted=9,875; unweighted=451)

Table 7: Industry distribution by city (% of establishments)

Industry	Playford	Salisbury	Total
Agriculture, Forestry and Fishing	1.8	0.2	0.7
Manufacturing	4.6	7.6	6.7
Electricity, Gas, Water and Waste Services	0.7	0.8	0.7
Construction	10.8	13.5	12.7
Wholesale Trade	1.9	4.2	3.5
Retail Trade	16.9	13.9	14.8
Accommodation and Food Services	4.3	0.0	1.3
Transport, Postal and Warehousing	2.4	3.5	3.1
Information Media and Telecommunications	0.3	0.4	0.4
Financial and Insurance Services	0.6	0.9	0.8
Rental, Hiring and Real Estate Services	1.9	0.0	0.6
Professional, Scientific and Technical S	3.9	4.9	4.6
Administrative and Support Services	3.4	3.1	3.2
Public Administration and Safety	0.0	0.7	0.5
Education and Training	2.9	3.0	3.0
Health Care and Social Assistance	6.5	5.3	5.7
Arts and Recreation Services	1.8	2.1	2.0
Other Services	35.3	36.1	35.9
Total	**100**	**100**	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 8: Industry distribution – grouped (% of employers)

Industry	Playford	Salisbury	Total
Manufacturing	4.6	7.6	7
Construction	10.8	13.5	13
Health Care and Social Assistance	6.5	5.3	6
Retail Trade	16.9	13.9	15
Other	61.2	59.7	60
Total	**100**	**100**	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 9: Job description and performance review (% of employers)

Proportion of employees	Has a formal written job description (%)	Has an annual performance review (%)
None	27.5	38.1
Some	6.0	3.9
Around Half	5.8	4.2
Most	6.9	3.3
All	53.6	49.7
Don't know	0.2	1.0
Total	**100**	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 10: Factors that affect organisational performance (% of employers)

	1 (strongly agree)	2	3	4	5 (strongly disagree)	Unsure/ na/ don't know
Tax burden	18	9	21	13	35	4
Customer demand	16	14	24	17	29	0
Competition in the marketplace	25	12	20	17	26	0
Opportunities to expand in new markets	23	16	24	16	19	1
Exchange rate	53	13	16	8	8	1
Availability of capital	29	8	21	14	26	3
Skills shortages	24	12	23	18	22	0
Staff turnover	39	20	22	12	7	0
Global environment	22	14	25	22	17	1
Access to government funding	36	15	15	13	20	1

Base: All employers (weighted=9,875; unweighted=451)

TABLE 11: FACTORS THAT ARE INFLUENTIAL IN IMPROVING ORGANISATIONAL PERFORMANCE (% OF EMPLOYERS)

	1 (not at all influential)	2	3	4	5 (extremely influential)	Unsure/ na/ don't know
Employee participation in decision making	9	6	25	33	27	0
Attracting qualified staff	14	5	17	27	37	0
Skills development for employees	10	7	19	33	31	0
Skills development for managers	13	8	18	30	32	0
Providing family friendly working	15	15	33	21	14	1
Changes to workplace organisation	12	14	20	22	31	1
Improved marketing	14	12	30	26	19	0
Collaboration with other firms/organisations	14	12	30	26	19	0
Improving leadership skills within the organisations	12	6	20	32	30	0
Application of new technology	6	7	26	22	38	0
Increased investment in research and development	20	16	33	18	12	1

Base: All employers (weighted=9,875; unweighted=451)

TABLE 12: COLLABORATION WITH OTHER ORGANISATIONS (% OF EMPLOYERS)

	Exchange of skills	Exchange of knowledge	Sharing equipment	Sharing staff
Never	8.8	16.5	43.9	54.5
Rarely	14.5	22.5	18.7	20.2
Occasionally	32.3	34.6	15.4	15.6
Often	24.5	16.2	12.7	2.9
Always	16.5	7.8	6.9	4.5
Unsure	3.3	0.1	0.0	2.3
Not applicable	0.2	2.3	2.3	
Total	**100**	**100**	**100**	**100**

Base: All employers (weighted=9,875; unweighted=451)

TABLE 13: EMPLOYER SENTIMENT INDICATORS – TO NOVEMBER 2014 (% OF EMPLOYERS)

	Intentions to invest	Intentions to recruit	Expectations for business profits	Expectations for sales	Expectations for growth
Strong increase	11.6	3.3	6.5	8.3	7.0
Moderate increase	39.6	30.0	43.3	44.8	51.2
No change	36.6	60.8	37.3	24.2	32.7
Moderate decrease	6.2	3.3	3.6	3.9	2.9
Strong decrease	2.9	0.6	3.0	2.5	2.6
Unsure	2.9	2.0	6.3	4.5	3.0
Not applicable	0.1	-	-	11.7	0.6
Total	**100**	**100**	**100**	**100**	**100**

Base: All employers (weighted=8,613; unweighted=399)

Table 14: Number of vacancies – current and next 12 months (% of employers)

Number of vacancies	Current (November 2013)	Next 12 months (to November 2014)
No vacancies	85.8	53.2
1 vacancy	7.0	15.5
2 vacancies	4.9	15.0
3 to 5 vacancies	1.4	7.2
6 to 10 vacancies	0.5	4.9
Don't know	0.5	4.3
Total	100	100

Base: All employers (weighted=9,875; unweighted=451)

Table 15: Usual methods of advertising (% of employers)

Method of advertising	Percent
Internet	45.8
Informal	35.5
Newspaper	29.5
Other	18.8
Recruiting Agency	11.4
Job Services Australia	3.9
Social Media	1.8
Don't know	1.7

Base: All employers (weighted=9,875; unweighted=451)

Table 16: Most Successful methods of advertising (% of employers)

Method of advertising	Percent
Internet	33.2
Newspaper	11.4
Social media	0.3
Informal	27.6
Recruitment agency	5.8
Job Services Australia	2.7
Other/don't know	19.0
Total	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 17: Occupational skills demand: current and next 12 months (% of employers)

Unweighted base (employers)	*86*	*214*
Weighted base (employers)	*1,341*	*4203*
Occupation	**Vacant at November 2013**	**Required to November 2014s**
Managers	2.3	1.0
Other	5.2	9.9
Machinery Operators & Drivers	8.0	5.0
Clerical & Admin	10.1	15.2
Sales Workers	11.4	17.4
Labourers	11.8	14.8
Professionals	14.1	9.3
Community & Personal Svc	16.5	4.3
Technicians & Tradespersons	20.6	23.2
Total	100	100

Table 18: Hard-to-fill occupations, November 2013 (% of employers with hard to fill vacancies)

Hard to fill occupations	Percent
Technicians & tradespersons	31.0
Professionals	20.3
Machinery operators & drivers	13.0
Community & personal services	11.5
Sales workers	10.6
Managers	8.2
Labourers	2.8
Clerical & admin workers	1.8
Other	0.9
Total	**100**

Weighted base: 794 employers; unweighted base50 employers

Table 19: Reason for having a hard-to-fill occupation, November 2013 (% of employers with hard to fill vacancies)

Reason	Percent
Too much competition from other employers	6.8
Not enough people interested in doing this type	26.3
Low number of applicants with required skills	46.2
Location of establishment	2.9
Other reasons	35.2
Don t know	4.0

Weighted base: 794 employers; unweighted base:50 employers

Table 20: Attracting and retaining staff (% of employers)

	Attracting qualified staff	Attracting experienced staff	Training staff	Retaining staff
Not an issue	19.0	20.2	29.5	42.7
Minor issue	16.9	11.4	16.6	20.1
Moderate issue	22.8	27.8	24.4	17.6
Major issue	37.8	37.0	26.3	16.8
Unsure/na	3.55	3.57	3.18	2.96
Total	**100**	**100**	**100**	**100**

Base: All employers (weighted=9,875; unweighted=451)

Table 21: Identifying skill gaps and up-skilling within organisations (% of employers)

	Yes	No	Don't know
Recognise prior learning	74.7	21.0	4.3
Support training & development	85.2	14.1	0.7
Formally assess skills gaps	58.7	38.5	2.8

Base: All employers (weighted=9,875; unweighted=451)

Table 22: Methods of addressing skill-gaps (% of employers)

Activity	Percent
Increase the number of training activities	80.1
Implement a mentoring scheme	35.7
Increase staff supervision	32.1
Conduct more staff appraisals	22.6
Increase recruitment	8.5
Other	3.1
Nothing	2.2
Recruit workers from overseas	1.7

Weighted base: 5,800 employers; unweighted base: 265 employers

Table 23: Usual methods of training (% of employers)

	Percent
Learning on the job	65.6
Formal training programs or accredited courses delivered	60.4
In-house training courses	51.5
Short courses, workshops, summer schools	28.1
Mentoring, coaching, job shadowing	27.3
Conferences, seminars and forums	17.3
Traineeships, internships or post-graduate programs	13.9
Job rotation or secondments	7.1
Other	3.2
Online self-directed training	2.7

Weighted base: 8,413 employers; unweighted base: 388 employers

Table 24: Occupations that will need up-skilling in the next 12 months (% of employers with staff requiring upskilling)

	Percent
Skilled trades occupations	28.5
Technical/associate professionals	26.1
Professional occupations	22.1
Managers	16.8
Administrative/secretarial	15.4
Sales and customer services	14.5
Other occupations	8.2
Process plant and machine operators	7.7
Personal service occupations	3.2
Don't know	0.4

Weighted base: 6,155 employers; unweighted base: 290 employers

Table 25: Skills that will need improving in the next 12 months (% of employers with staff requiring upskilling)

	Percent
Technical, practical or job-specific skills	82.4
General IT user skills	51.2
Problem solving skills	48.3
Team working skills	48.0
Leadership skills	45.4
Management skills	44.2
Customer handling skills	42.3
Oral communication skills	41.8
Office management skills	41.1
Written communication skills	37.6
Foreign language skills	10.1
No particular skill difficulties	2.1

Weighted base: 6,155 employers; unweighted base: 290 employers

Table 26: Barriers to training (% of employers)

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Unsure/na
Training is not available locally	6.9	19.8	11.9	33.4	14.9	13.1
The quality of the courses or providers is not satisfactory	5.2	13.0	12.2	47.7	6.7	15.3
The times are inconvenient	4.3	18.9	17.1	38.4	4.3	17.1
Training is too expensive	2.4	31.3	12.5	37.2	1.8	14.8
Managers don t have time to organise training	2.3	22.9	10.2	47.4	6.4	10.8
Employees are too busy to undertake training a	2.3	28.9	12.9	42.0	5.3	8.7
Don't know where to find the right training	0.8	12.8	8.4	61.6	7.7	8.7
Staff aren't interested	1.4	23.0	14.4	46.5	5.9	8.8
All our staff are fully proficient	4.9	44.3	9.8	33.0	2.0	6.0
I don't see value in training	0.2	1.9	3.3	56.7	32.7	5.3

Base: All employers (weighted=9,875; unweighted=451)