

HAWKES BAY:
**A SURVEY OF EMPLOYMENT
POLICIES AND BUSINESS REQUIREMENTS**

Working Paper No. 1
Labour Market Dynamics Research Programme

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A number of people from Massey University have helped with this research. Ted Drawneek and Allen Bartley have tidied up and massaged the statistics generated by the survey. Viv McGuire has provided sterling administrative and secretarial help.

And finally, but far from least, we would like to thank all those who took the effort to complete the questionnaire, and to send it back. We hope that it has been, and will be, of some help to the people of Hawkes Bay.

Preface

A team at Massey University has been funded by the Foundation for Research, Science and Technology to examine labour market dynamics in three regional labour markets; Hawkes Bay, South Waikato and Waitakere. As an adjunct to that work, the Local Employment Committee in Hawkes Bay invited two from the Massey University team, Paul Spoonley and Philip Dewe, to conduct a further survey, funded by them, to research employer practices and requirements. A small proportion of that work is reviewed here. It also provides a first for the Massey University research team. It is the first in a series of working papers designed to provide an accessible publication that, hopefully, will be of interest to a variety of different groups. This, then, is freely available to whoever is interested. For more copies, or any further details, please contact Paul Spoonley, School of Sociology and Women's Studies, Massey University, Private Bag 102-904, North Shore, New Zealand.

Introduction

The following is a summary of the main results as they relate to the survey of nine hundred businesses in Hawkes Bay which was carried out in 1997. The survey was initiated by the Napier and Hastings Local Employment Co-Ordination Group who had been interested in finding out more about the views of employers regarding key issues and concerns surrounding the employment policies and requirements of businesses in the Napier-Hastings area. The Local Employment Co-Ordination Group was made up of the Napier City Council, the Eastern Institute of Technology, Education and Training Support Agency, Income Support, Accident Compensation Corporation, New Zealand Employment Service, Ministry of Maori Development and the Community Employment Group. The project was carried out in conjunction with Professor Paul Spoonley and Allen Bartley, College of Humanities and Social Sciences, Albany and Professor Philip Dewe, then of the College of Business, Palmerston North of Massey University, now of Birkbeck College, London.

The survey questionnaire was quite an extensive one with five major sections which looked at the details of the firms being surveyed, the recruitment of employees, employment practices, trends in Hawkes Bay and the future as employers saw it. The questionnaire was developed in conjunction with the members of the Napier and Hastings Local Employment Co-Ordination Group. The material generated by the survey produced statistical tables of more than six hundred pages. What follows is a brief overview which highlights some of the more significant findings or interesting trends.

Regional labour markets and economic areas are facing substantial challenges in the wake of the restructuring of the economy and of the labour market in the late 1980s and 1990s. Hawkes Bay, with its mix of primary producers, manufacturing and service industries, has experienced some significant setbacks with the closure of a number of large companies and the impact of environmental conditions, notably the drought of 1997-1998. In order to make decisions which benefit employers and employees in the Hawkes Bay area, and the communities of the area, information is required which helps profile the firms that currently exist and who have a very clear view about their requirements and respective futures. The information here is designed to contribute to the decision-making process in a way that will ultimately benefit all in Hawkes Bay.

The key points are summarised below, and a small selection of the comments offered by employers are included in bold italics.

The Sample

Lists of Hawkes Bay employers were primarily provided by Work and Income New Zealand from its employer database. Staff at WINZ provided a list of 5,700 addresses which provided an extensive, and mostly complete, coverage of employers and firms in all business sectors (Primary, Manufacturing, Services). It therefore constituted a census, and there was reasonable confidence that in excess of 90 percent of firms in a

range of sectors were sent a questionnaire. However, as with all postal surveys, the response rate was quite low. Of the 5700 questionnaires sent out, 1116 were returned. A number were discarded because they were completed inappropriately or could not be satisfactorily coded. In the end, 953 were successfully coded, and these provide the data that is described here. There was noticeably higher rates of return from certain sectors, noticeably “Wholesale/Retail, Restaurants and Hotels”, and “Community, Social and Personal Services”. These two categories provided 52 percent of the total respondents. This introduces a degree of statistical distortion, especially as the returns for the horticultural and farming sectors, still an important feature of the Hawkes Bay regional economy, were much lower. This caveat needs to be borne in mind as the material is presented. On a positive note, the quality of the responses, both to the questions with specific answer responses and to the open-ended questions towards the end of the survey, were high, and provided excellent information.

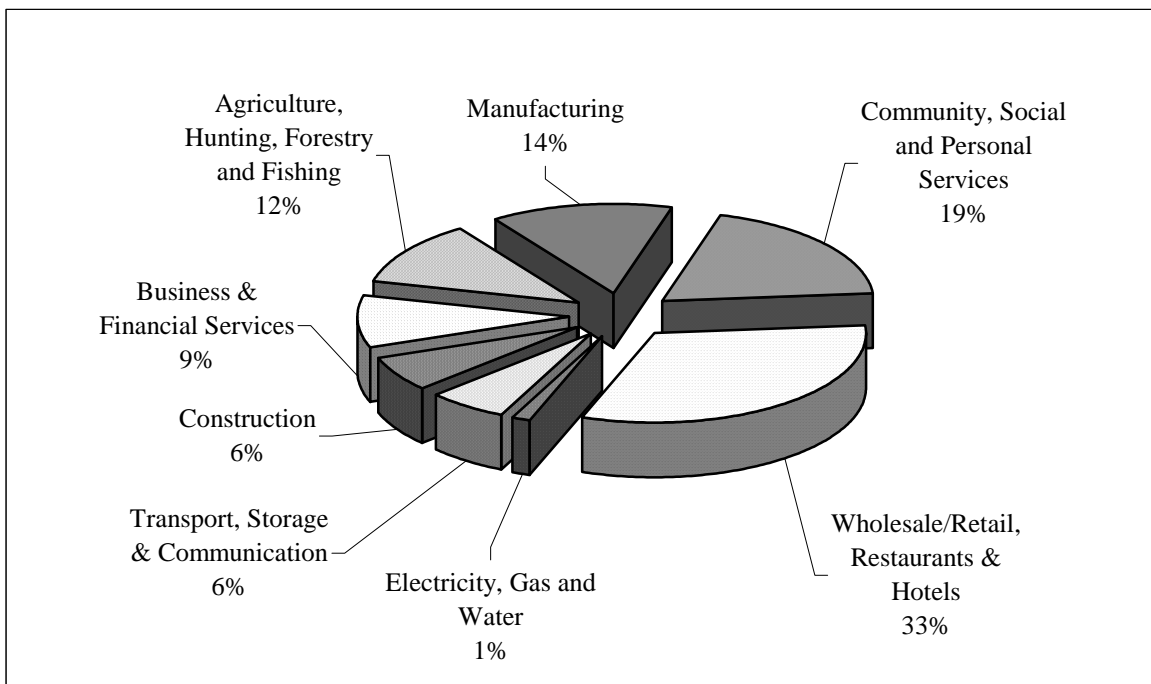
A full set of frequency tables are provided as an appendix to this working paper. Cross-tabulations are available on request. These are numerous, and could not be included here, but they do provide some interesting information on what particular employers and sectors do or require in the context of the Hawkes Bay labour market.

The Survey

Respondents

In total, 953 employers and firms answered the questionnaire. Each respondent was asked to identify that firm's business using Statistics New Zealand's *New Zealand Standard Industrial Classification* (NZSIC) categories. These were then consolidated into larger, related groupings for the purposes of analysis (see Appendix 1 for NZSIC categories and groupings). The largest business grouping represented was the Wholesale, Retail, Restaurants and Hotel sector who made up thirty-three percent of the respondents. The next largest group were in the Community, Social and Personal Services at nineteen percent, Manufacturing at fourteen percent, and Agriculture, Hunting, Fishing and Forestry at twelve percent (Figure 1; see also Appendix 2 for frequencies).

Figure 1: Business Sectors of Respondent Firms, Hawkes Bay



Those employers in the Service sector made up almost three-quarters of the respondents with employers from the Manufacturing sector providing 14% of the respondents and those from the Primary sector 12%. Given the nature of the Hawkes Bay regional economy, the Primary sector is under-represented.

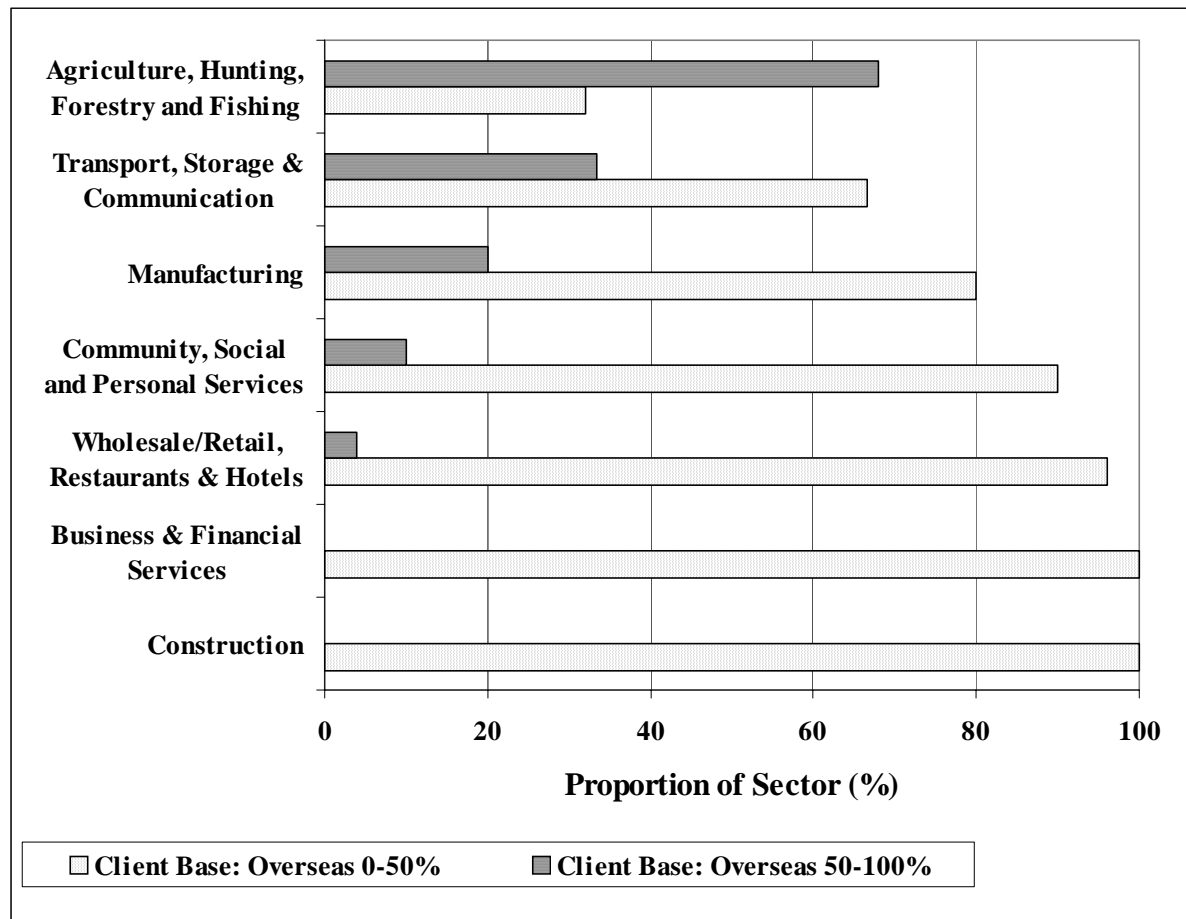
Client and Market Base

Most firms taking part in the survey had their main market or client base in Hawkes Bay. Of the 953 firms who responded, about ninety percent indicated that their market or client-base was primarily in Hawkes Bay. This is perhaps not surprising, given that over a third of the firms represented in the sample were in the 'Wholesale/Retail,

Restaurants and Hotels’ business category. While twenty percent of the firms represented indicated that some of their market or client base was overseas, and about the same proportion did the most of their business in other parts of New Zealand, the majority of the respondents (58%) did virtually all their business in Hawkes Bay.

In terms of the broadest possible groupings, the Primary sector was much more likely than the others to have an overseas client or market base, with nearly half of the responding firms from the Primary sector claiming an overseas focus. Those in the Primary sector who were exporters (53 of the 111 firms identified in that sector) were focused almost completely on overseas markets and domestic markets outside Hawkes Bay (see Figure 2). These export-focused firms were primarily in Agriculture and Hunting, Wood Processing and Wood Product Manufacture, and Forestry and Logging.

Figure 2: Business Sectors with Market/Client Base Overseas



In both Manufacturing and Service groupings, a large proportion of the client-base was in Hawkes Bay although manufacturers were more likely to have a client and market base elsewhere in New Zealand. Services are primarily Hawkes Bay-focused, although it is interesting that over twelve percent of firms identifying as providers of either Social and Related Community Services or Personal and Household Services indicated that a majority of their market or client base was located overseas, and

nearly 20 percent of social service providers had a significant client base elsewhere in New Zealand.

Those NZSIC business sectors in which a proportion of firms (over 40%) indicated that a majority of their market or client base was located in New Zealand, but outside Hawkes Bay, were:

- Manufacture of Chemicals, and of Chemical, Petroleum, Coal, Rubber and Plastic Products
- Construction Other Than Buildings
- Manufacture of Food, Beverage, Tobacco
- Other Manufacturing Industries
- Concrete, Clay, Glass, Plaster, Masonry, Asbestos and Related Mineral Product Manufacture

“Hawkes Bay is too dependent on the Primary land based industry. The ripple affect from the downturn in the primary sector impacts significantly on the entire Hawkes Bay [economy]” (Hawkes Bay Employer).

Who Is Employed?

Questions were asked of employers about the number of staff they had in permanent full-time positions, permanent part-time, temporary full-time, temporary part-time and casual positions. In addition, they were asked about the number of employees they had at their seasonal low and seasonal high points and how many they might have in various categories such as managerial, administrative, service and production, sales and marketing, as well as what their annual staff turnover is, where their employees lived, and the age, gender and ethnic composition of their employees.

What is obvious from the proportions of staff in the categories ranging from permanent full-time to casual is the reliance of employers in Hawkes Bay on temporary part-time and casual staff. It is very obvious in firms in areas such as agriculture and printing, forestry and logging, food beverages and tobacco, certain basic metal industries, construction services, restaurants and hotels and sanitary and cleaning services. In the agricultural sector, on average, three-quarters of the staff are employed on a part-time or casual basis. This is particularly high but many other employers in other sectors rely on casual, temporary and part-time labour, which confirms the reliance on a casualised work-force in Hawkes Bay. Half of all the firms rely on a third of their work-force being part-time, while 10% to 20% rely on a quarter of their work-force being temporary part-time or casual employees.

In addition to a substantial reliance on part-time and casual staff, the seasonal nature of employment in Hawkes Bay is obvious in the answers. The reality is that the demand for full-time employees increases by 20% between low and high periods, while part-time employees double. There also appears to be a very considerable seasonal movement of part-time employees across sectors. Respondent firms in the

Agriculture, Hunting, Forestry and Fishing sectors comprised, during seasonal high periods, nearly half of all employees represented in the survey. The respondents in the Manufacturing sector also showed a significant increase, while nearly all other sectors had a reduced proportion of the part-time employees accounted for in the sample. The figures are complicated by the fact that a single employer in the Community, Social and Personal Services reported having 2002 part-time employees during the low season, but vastly fewer part-timers in the peak season. If that single employer is removed from the analysis, then only Agriculture/ Forestry/Fishing and Manufacturing significantly increase their proportion of all the part-time employees accounted for in the sample during seasonal high periods. All other sectors (save for Construction) are reduced, most notably Wholesale/Retail/Restaurants and Hotels (see Table 1). This picture was reinforced by the numbers in the Primary sector who are employed at seasonal low periods in both the permanent and full-time categories. In terms of full-time employees, the seasonal low was doubled by the time of the seasonal high for the firm or business. The responses confirm the casualised and seasonal nature of the Hawkes Bay economy, and the significant shifts in labour demand depending on the time of the year.

Table 1: : Number of Part-time Employees at Low and High Seasons (as Proportion of All Employees Accounted for in the Sample), By Business Categories

	Part-time Employees at Seasonal Low Periods		Part-time Employees at Seasonal High Periods
	Proportion of All Part-time Employees in Sample (N=2676)		Proportion of All Part-time Employees in Sample (N=1241)
		<i>N=674</i>	
Community, Social & Personal Services	76.3 ¹	[5.9]	4.5
Wholesale/Retail, Restaurants & Hotels	10.5	[41.5]	26.5
Agriculture, Hunting, Forestry and Fishing	6.5	[26.0]	47.7
Transport, Storage & Communication	3.3	[13.2]	3.4
Manufacturing	2.5	[10.1]	15.5
Business & Financial Services	0.5	[1.9]	1.0
Construction	0.3	[1.2]	1.3
Electricity, Gas and Water	0.0	[0.1]	0.1
Total	100.0		100.0

¹A single respondent reported 2002 part-time employees during seasonal low periods. For the question on seasonal high periods, the Community, Social and Personal Services respondent with the greatest number of part-time employees listed only 44. To give a clearer picture of more general trends, that single firm has been removed and the revised proportions listed in brackets.

The numbers of staff required in various positions (management, administration, service, production, sales, marketing) within a firm did not alter significantly between normal and peak periods. This was apparent in management, administrative and service positions and marketing. If there was likely to be an increase, it tended to be in the number of staff employed in production and sales.

Employers were asked whether or not formal qualifications were required for various positions. In the case of managers, there was a much higher likelihood that they required formal qualifications, followed by those in service and administrative positions. In the case of production and sales, there were relatively few employers who indicated that they required formal qualifications for their employees.

*“Hawkes Bay needs a University offering full degrees and the region needs to provide career opportunities once the student has finished”
(Hawkes Bay Employer).*

Staff Turnover

Employers were asked about the estimated annual turnover. In terms of relatively high levels of staff turnover of 15% or more, three categories stood out: the Construction Industry, Restaurants and Hotels and Sanitary and Cleaning Services. A number of sectors had annual staff turnover rates of around 10% including Agriculture and Hunting, Food Beverage and Tobacco, Chemical Manufacture and Wholesale Trade, but given the reliance on part-time staff, this is to be anticipated.

In terms of broad sectors, the Primary sector generally had a much higher annual staff turnover (double that of the Manufacturing and Services sectors).

Age

The distribution by age in various sectors shows substantial variability. There is a significant correlation between those sectors that rely on casual and part-time staff and the employment of those under 19 years of age.

Those sectors which had considerable numbers in the 15-19 age group included Agriculture and Hunting, Food Beverage and Tobacco, Construction, Retail Trade, Restaurants and Hotels and Sanitary and Cleaning Services. However, there are others who do not appear to employ any from this age group, including Forestry and Logging, Chemical Manufacturers, basic Metal Industries, Communication Financing and Insurance.

It is also apparent that there are industries who regularly employ those aged over 60 including Agriculture and Hunting, Construction of Buildings, Recreation and Cultural Services and Personal and Household Services. Conversely, there are those that appeared not to employ any in the over 60s including Forestry and Logging, Fishing, Basic Metal Industries and Communication Industries.

There are those industries such as Fishing where there is a concentration of employees in particular age groups, in this case of those aged 30 and 49. Others, such as Recreation and Cultural Services, have a very broad spread with people in most age groups employed in the industry.

“Employers are hiring older employees because of their reliability, presentation and motivation to work” (Hawkes Bay Employer).

“Young people have a lack of direction and purpose. There is a big need for apprenticeships to provide a bridge for school leavers moving into the work force” (Hawkes Bay Employer).

Gender

In terms of gender, there were a number of sectors where the numbers of male and female employees were as broadly balanced. However, there were others with quite specific gender patterns.

Those sectors where employees were male-dominated include Forestry and Logging, Fishing, Wood Processing and Wood Product Manufacture, Manufacture of Chemicals, Basic Metal Industries and Construction Industries.

There were a number of sectors where there were more females including Food Beverage and Tobacco and Textile Apparel and Leather Goods, Retail Trade, Restaurants and Hotels, Financing, Insurance, Real Estate and Business Sector, Recreational and Cultural Services. There were two sectors where the number of female employees was very dominant and they include Social and Related Community Services and Personal and Household Services.

Those sectors that relied on casual or temporary staff, and who employed 15-19 year olds, were also much more likely to employ significant numbers of females.

Ethnicity

The ethnicity of employees tended to vary substantially. In most industries, the number of Pakeha was very dominant and in some industries, almost completely dominant. These included areas such as Financing, Insurance, Communication and Manufacture of Paper and Paper Products.

Maori were most likely to be found in Agriculture and Hunting, Food Beverages and Tobacco, certain Construction Industries, Public Administration and Defence and Sanitary and Cleaning Services.

Pacific Island employees were most likely to appear in Agriculture and Hunting, Food Beverage and Tobacco and certain Manufacturing Industries.

Asians were unlikely to be employees except in the Retail Trade and Restaurants and Hotels.

“Need training programme to educate unemployed about motivation, application and especially presentation (esp Maori)” (Hawkes Bay Employer).

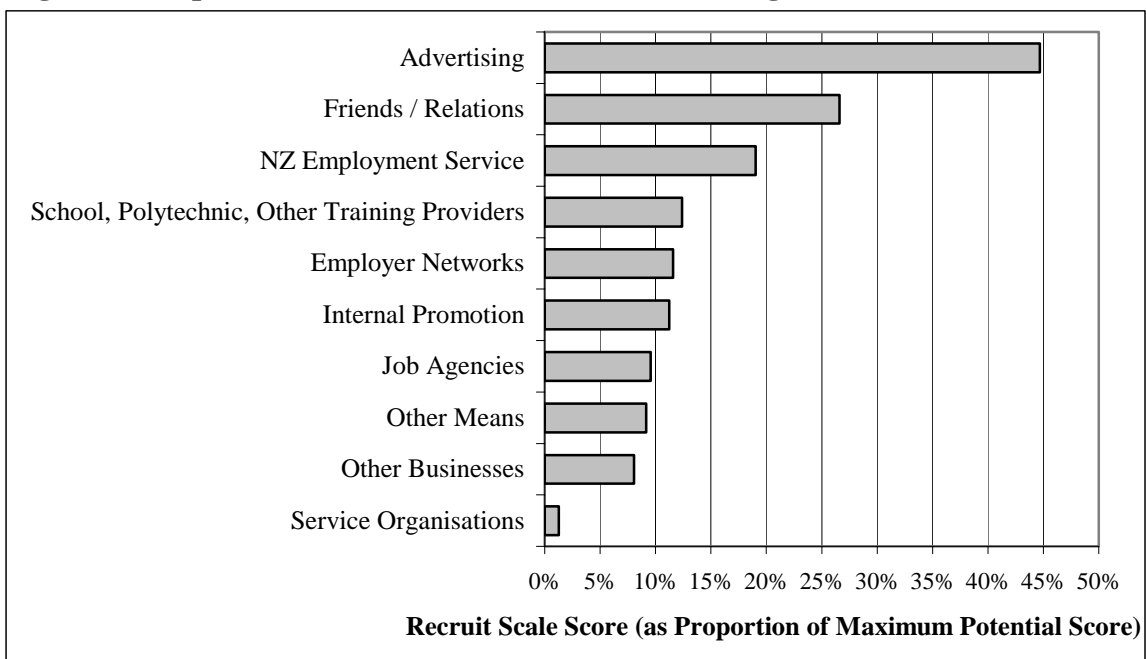
“It’s becoming easier for employers to hire overseas workers for seasonal work because they are more motivated and more reliable than the local work-force” (Hawkes Bay Employer).

Recruitment of Staff

Respondents were presented with a list of ten options and asked to specify, in order of priority, up to three options used to normally recruit staff. The responses were scored according to a simple scale: the option chosen as the third-ranked priority received a score of 1, the option ranked second scored 2, and the top-ranked option scored 3. The scores were added, then compared to the highest potential score, which is the score the option would have received if each respondent has ranked that option as their highest priority.

The recruiting option most preferred by respondents was advertising. It received a score 18 percent greater than the next highest option (recruiting staff via friends and relations), and more than double any other option (see Figure 3).

Figure 3: Respondents' Preferred Methods of Recruiting Staff



Interestingly, employers in different sectors used different strategies to recruit staff. For instance, while advertising was used by every sector, it was most heavily used by firms in the Community, Social and Personal Services, where it scored 60 percent of the maximum score. Employers in the Electricity, Gas and Water industries relied heavily on other businesses to recruit staff: this option scored over 86 percent, while the second-highest scoring option from this sector was advertising, with only 25% of the maximum possible score. Employers in the Business and Financial Service sectors relied more heavily than other employers on job agencies and schools, polytechs and other training providers, while Manufacturers recruited staff via the New Zealand Employment Service more readily than did other sectors. With the exception of the Electricity, Gas and Water firms, however, all sectors relied more heavily on advertising than any other recruiting option.

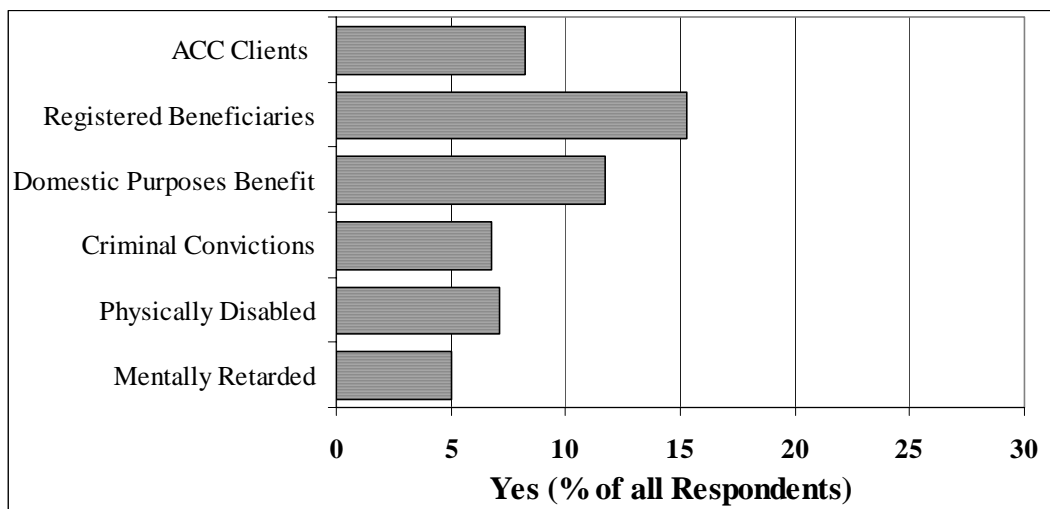
Employment of Disadvantaged Job-Seekers

The next series of questions asked people whether or not they employed a variety of disadvantaged job-seekers and what would have encouraged them to do so if they did not at the time of the survey. The categories of the disadvantaged included jobseekers who:

- were ACC clients;
- were registered beneficiaries;
- were recipients of the Domestic Purposes Benefit;
- had criminal convictions;
- were physically disabled; or
- were mentally retarded.

The results were reasonably consistent across all the categories of disadvantaged job-seekers, with most respondents currently employing almost none (see Figure 4).

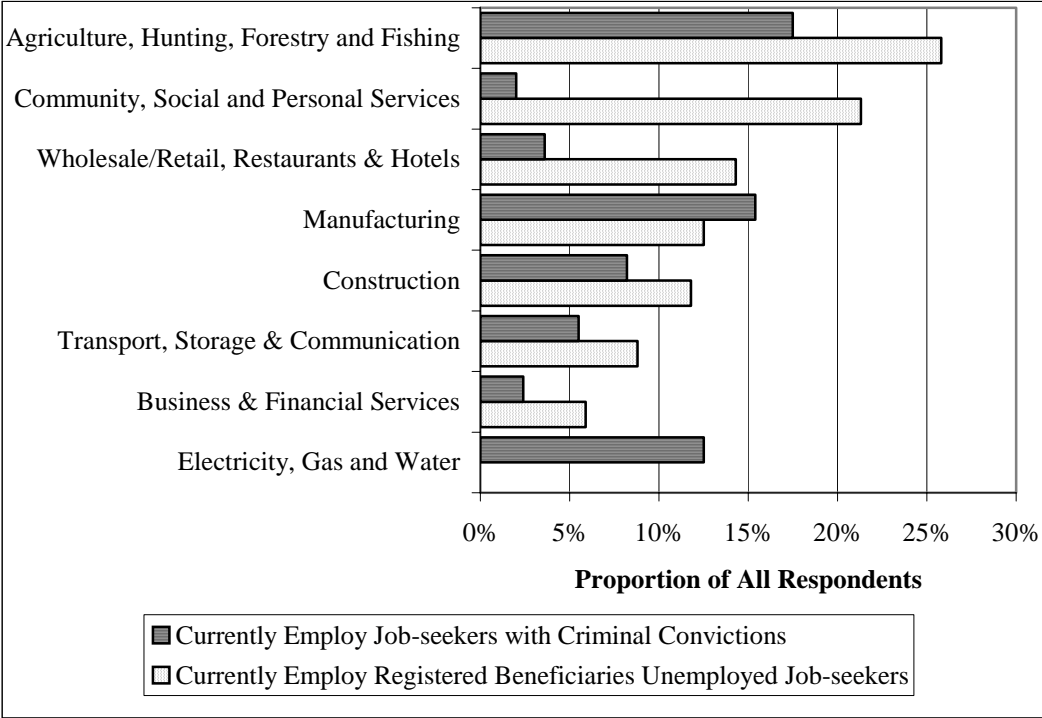
Figure 4: Do Firms Currently Employ Disadvantaged Job-Seekers?



There was little significant variance across business sectors with regard to employing most categories of disadvantaged job-seekers, with the exception of two, unemployment beneficiaries and those with criminal convictions (see Figure 5). Just over one in four of those respondents in the Agriculture, Hunting, Forestry and Fishing sectors currently employed those who were unemployment beneficiaries, as did about one in five of those in the Community, Social and Personal Services sectors. All other sectors appeared below 15 percent, while the Electricity, Gas and Water employers currently employed no job-seekers who were unemployment beneficiaries.

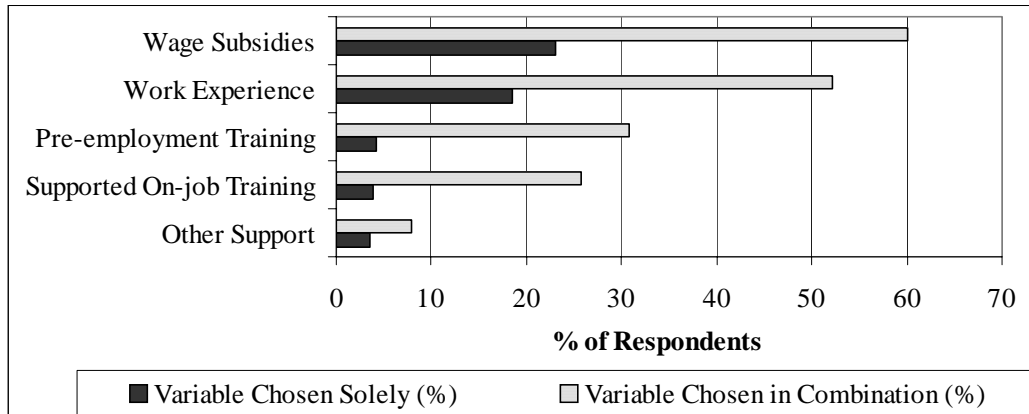
Unsurprisingly, the proportions who currently employed job-seekers with criminal convictions was unsurprisingly lower across all sectors, although all sectors reported employing some job-seekers with criminal convictions. Once more those employers in the Agriculture, Hunting, Forestry and Fishing sectors employed more of these job-seekers than any other sector (18%), followed closely by the Manufacturing sector and Electricity, Gas and Water, at 15 and 13 percent, respectively.

Figure 5: Firms Employing Disadvantaged Job-Seekers, by Sector



With regard to any incentives which might encourage firms to employ disadvantaged job-seekers, participants were presented with a variety of incentives and asked to choose all the options which would encourage them to hire disadvantaged job-seekers. The most frequently chosen incentive was wage subsidies followed by work experience, although respondents indicated that combinations of incentives were preferred to any single option (see Figure 6). Well over half the respondents indicated that a combination of wage subsidies *and* work experience – and, though less often, pre-employment training and/or on-the-job training as well – would encourage them to hire disadvantaged job-seekers. Exactly which categories of disadvantaged job-seekers were not specified.

Figure 6: Incentives Which Would Encourage Respondents to Employ Disadvantaged Job-Seekers



“The presentation and qualifications and training of the unemployed labour force is not acceptable” (Hawkes Bay Employer).

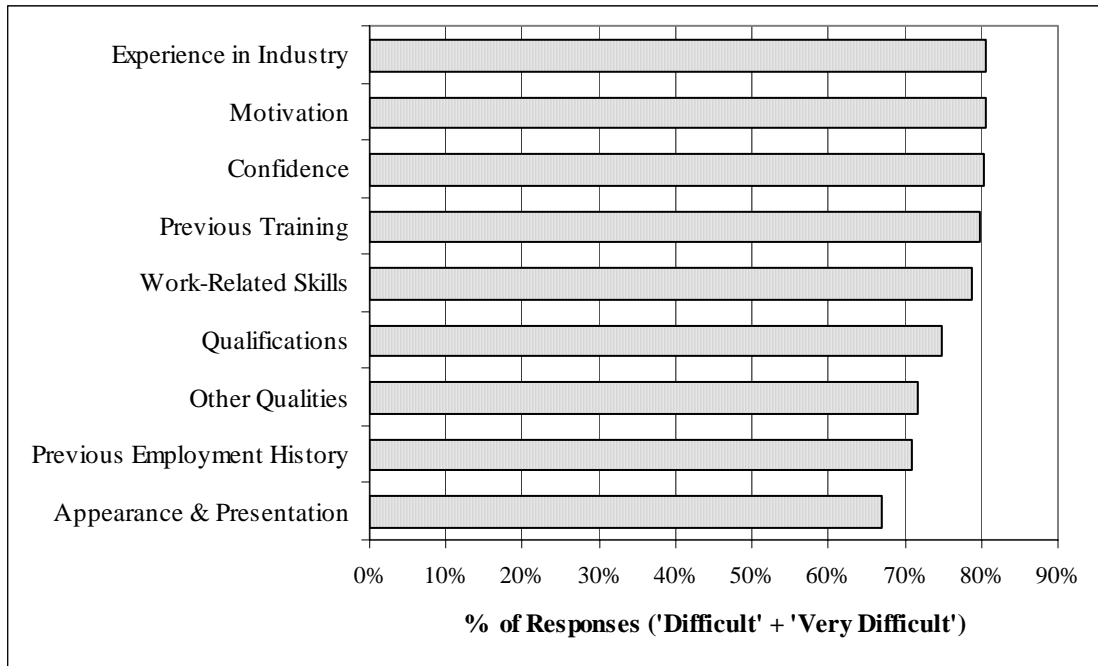
Qualities Sought in Employees

Participants were presented with a list of qualities and asked to identify, on a seven-point scale, the degree of difficulty in finding each quality when employing staff, from not at all difficult to very difficult. The listed qualities were:

- Motivation;
- Appearance and presentation;
- Confidence;
- Previous employment history;
- Work-related skills;
- Experience in industry;
- Previous training;
- Qualifications; and
- Other qualities to be specified by respondents.

More than half the survey respondents rated each of the listed qualities as being either difficult or very difficult to find in the context of the Hawkes Bay labour market, with responses ranging from 67 percent for appearance and presentation to 81 percent for the most-chosen option, industry experience (see Figure 7). None of the listed qualities received a majority of responses and thus indicated that characteristic was easy to find; in fact, for every listed quality, the most common response was ‘Difficult’.

Figure7: Difficult Qualities to Find When Employing Staff (“Difficult” + “Very Difficult”)



“Lack of motivation, application and reliability seem to be the key factors in their desire not to work” (Hawkes Bay Employer).

“A key motivational factor evident in this local unemployed is the lack of incentive to start paid work, because the difference between the UEB and the seasonal minimum wage is not great enough” (Hawkes Bay Employer).

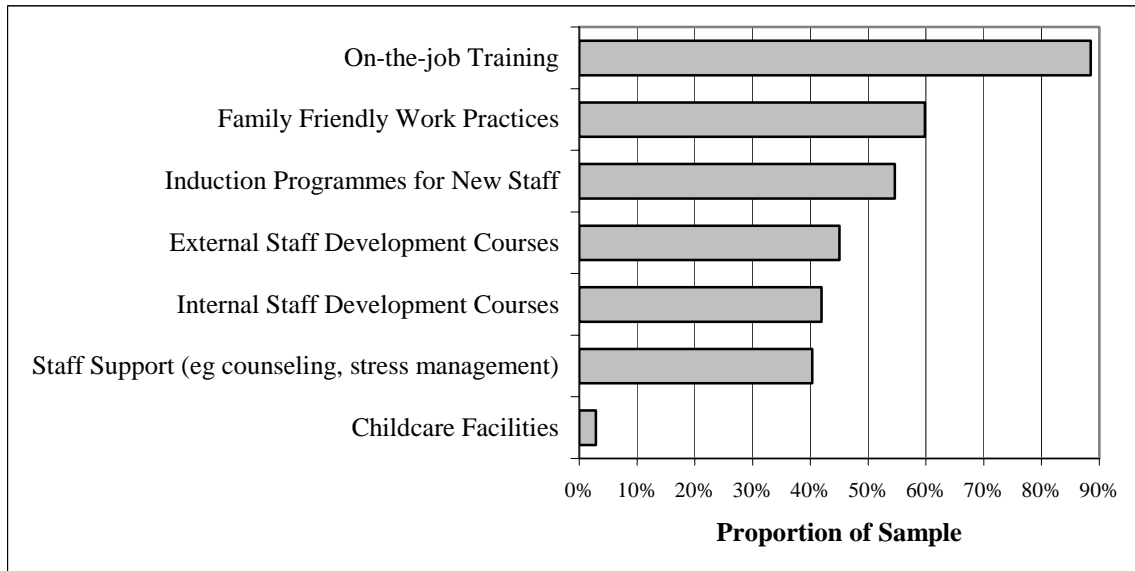
Work-Place Practices

Employers were asked about their work-place practices and what they provided for staff. Once again, they were provided with a list of options and asked to indicate whether they provided any of the following for staff:

- Induction programmes for new staff;
- On-the-job training;
- Internal staff development courses;
- External staff development courses;
- Childcare facilities;
- Family friendly work practices; and
- Staff support (e.g. counselling, stress management)

The vast majority of employers – 89 percent – provided on-the-job training, and greater than half indicated that they provided induction programmes for new staff and family-friendly workplaces. However, what each respondent actually meant by the latter response is unclear, given that ‘family friendly workplaces’ was not defined and also that only 3 percent of respondents provided childcare facilities (see Figure 8).

Figure 8: Services Provided to Staff by Employers



“Employers are hesitant to employ more people because of the costs enforced by ACC and OSH. Small businesses can’t afford the rise in costs, although more people could be employed” (Hawkes Bay Employer).

Training Needs

The employers were asked what their most important training needs were and they were asked to circle an appropriate number between 1 and 7 indicating “very important” to “not at all important”. The two very clear findings were the following:

- the training needs which were seen as unimportant included skills associated with exporting activities, market research, upskilling and computer and software training.
- the most unimportant training needs were identified as customer services, physical health and safety, quality management and interpersonal skills.

“Central/Local Government need to reintroduce an apprenticeship system and they must provide incentives and support for industries to give on the job training. Institutions such as the EIT need a closer working relationship with local industries when training is being provided” (Hawkes Bay Employer).

Bonuses, Incentives and Pay Rates

Employers were also asked about what incentives and rewards they offered to staff. The key results were that:

- 67% of employers offered staff bonuses, but only 27% were likely to offer performance-based pay rates.
- The most significant consideration in terms of determining pay rates was the skill of the employee, followed by the profitability of the firm. Market rates were still important but much less so than skills and profitability, and qualifications were the least important.

Trends

Firms were asked how many staff they had employed in 1994 (three years prior to the survey), and how many they expected to employ three years after the survey, in 2000.

Over half (55%) of respondents employed fewer than 5 people in 1994, and more than three-quarters employed fewer than 10. There were fewer responses to the question about staffing levels in 1994, presumably because a certain number of the firms had started up since that time. When asked about anticipated growth, there was a general modest upward trend reflected in the responses. Nearly half of the respondents in the smallest category expected to employ between one and ten more people, and over seventy percent of those expecting to employ between six and ten employees expected similar growth (see Figure 9). Those firms in the next two categories, 11-20 employees, and 21-50 employees, indicated similar levels of optimism (see Figure 10).

Figure 9: Anticipated Staffing Growth: Employers of 0-5 and 6-10 Employees

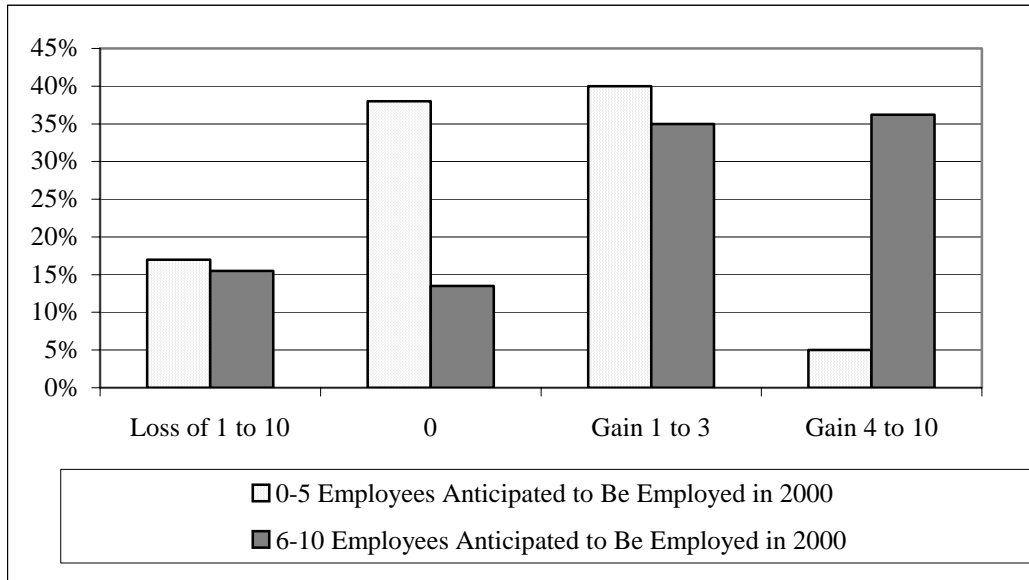
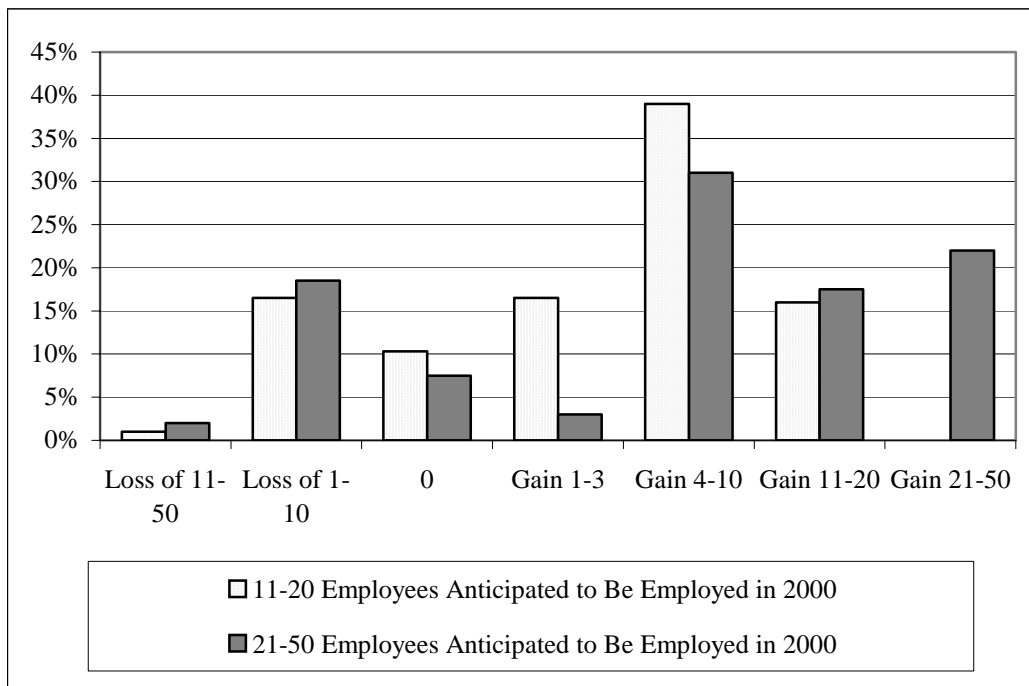
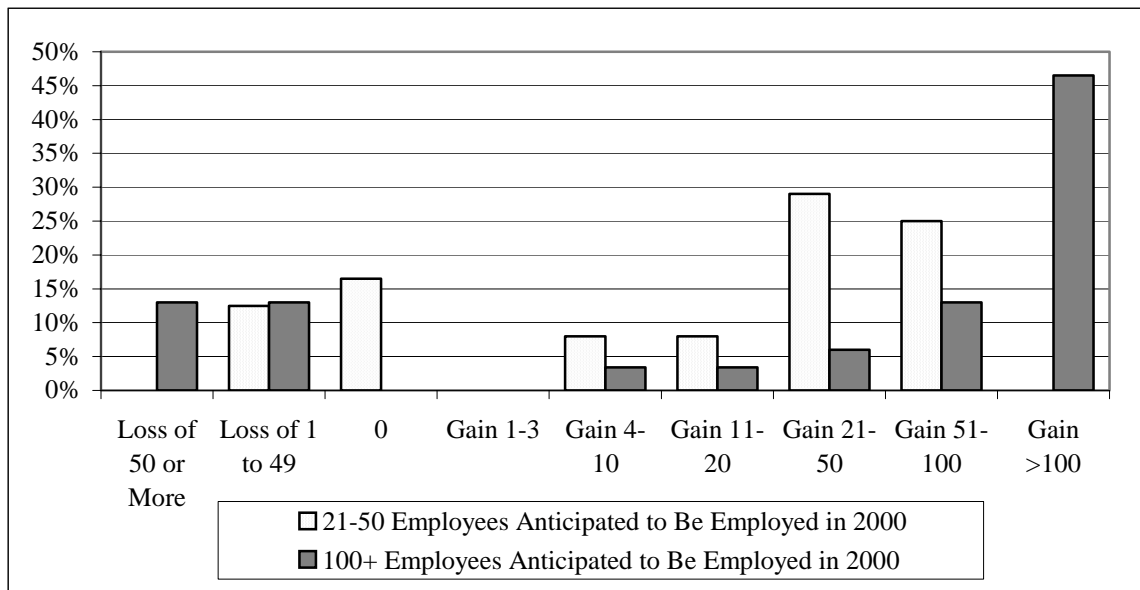


Figure 10: Anticipated Staffing Growth: Employers of 11-20 and 21-50 Employees



Perhaps most optimistic were the largest firms in the sample. Of those who had 51-100 staff, nearly a third anticipating adding twenty-one to fifty additional staff, and a full quarter expected to double their staff numbers. Still more optimistic were the firms in the largest category. Of those who had over 100 staff, nearly half expected to double their staff numbers (see Figure 11).

Figure 11: Anticipated Staffing Growth: Employers of 21-50 and 100+ Employees



“Employers have said that there will be no growth on tourism while we have two opposing local councils, trying to promote Napier and Hastings separately. Need to amalgamate both of the councils and promote Hawkes Bay as one region” (Hawkes Bay Employer).

Employers were also asked about the major influences on the numbers that they employed. Respondents were presented with a list of options and asked to indicate the importance of each factor on the numbers of staff they employed. Those options were:

- Climate (weather)
- Economic confidence
- Consumer confidence
- Exchange rates
- Overseas markets/international influences and trends
- Government policies – compliance costs
- Local Government/bureaucracy/interference/complication/difference
- Competition
- Political stability
- Labour costs
- Availability of labour (appropriateness)
- Capital replacement – technology
- Market size
- Skill levels
- Product development (R&D)
- Transport
- (there (to be specified by Respondent)

Labour costs was the factor most respondents – eight-four percent – indicated was either important or very important. Four other options were deemed to be important or very important by at least eighty percent of the respondents: market size, competition, and consumer and economic confidence. More than three-quarters of the respondents also placed importance on skill levels. On the other hand, factors such as transport, overseas markets and trends, the weather and exchange rates were deemed by most respondents to be unimportant (see Table 2).

Table 2: Important Influences on the Number of Staff Employed

Important Influences on the Number of Staff Employed	Proportion of Respondents			Total
	Unimportant (%)	Important (%)	Very Important (%)	
Climate (weather)	57.5	23.0	19.5	100%
Economic Confidence	20.4	39.2	40.3	100%
Consumer Confidence	20.1	37.1	42.8	100%
Exchange Rates	56.6	27.3	16.1	100%
Overseas Markets/ International Influences & Trends	57.5	24.5	18.0	100%
Government Policies – Compliance Costs	31.3	39.3	29.4	100%
Local Government/ Bureaucracy/ Interference/ Complication/ Difference	38.8	41.3	19.9	100%
Competition	16.7	35.3	48.1	100%
Political Stability	33.1	39.6	27.4	100%
Labour Costs	16.2	44.8	39	100%
Availability of Labour	32.4	41.6	26	100%
Capital Replacement – Technology	36.6	40.8	22.5	100%
Market Size	16.9	34.1	49.0	100%
Skill Levels	22.9	41.8	35.4	100%
Product Development (R&D)	48.2	35.8	16.0	100%
Transport	58.2	29.9	11.9	100%

While there is general agreement across most business sectors of the importance of many of these factors in determining staffing levels, some factors may have quite particular impacts on specific types of businesses. The proportions of all respondents, across all business sectors, therefore obscures significant differences *between* those sectors. For example, no one factor was singled out across every sector as being among the most important influences on staff numbers, although competition was mentioned as one of the top four factors in all but one of the business sectors, and labour costs in all but two. The Agriculture/Hunting/Forestry/Fishing sector was the only one in which over 80 percent of respondents mentioned the influence of overseas

markets, and the Electricity/Gas/Water and Community/Social/Personal Services sectors were the only ones in which government policy was an important factor in determining staff numbers (see Table 3).

Table 3: Most Important Factors Influencing Staff Numbers (as a Proportion of Each Business sector)

Agriculture, Hunting, Forestry & Fishing	Labour Costs 86%	Economic Confidence 85%	Availability of Labour 83%	Overseas Markets/ International Influences & Trends 81%
Manufacturing	Labour Costs 95%	Market Size 93%	Competition 92%	Consumer Confidence 91%
Electricity, Gas and Water	Consumer Confidence 100%	Competition 100%	Capital Replacement – Technology 100%	Govt. Policies – Compliance Costs 88%
Construction	Economic Confidence 91%	Competition 90%	Market Size 89%	Labour Costs 88%
Wholesale/Retail, Restaurants & Hotels	Competition 90%	Consumer Confidence 89%	Labour Costs 86%	Market Size 86%
Transport, Storage & Communication	Market Size 98%	Labour Costs 94%	Competition 89%	Skill Levels 89%
Business & Financial Services	Market Size 94%	Economic Confidence 94%	Competition 90%	Consumer Confidence 89%
Community, Social and Personal Services	Labour Costs 68%	Market Size 66%	Govt. Policies – Compliance Costs 65%	Competition 64%

“Need improvement of the profitability of the Primary land based industries. The profit margins aren’t great enough for any substantial growth” (Hawkes Bay Employer).

The Future

Participants were asked to anticipate any changes in the skills and qualifications their employees might need five years into the future, and also to speculate on the industries or business sectors that would bring employment growth to Hawkes Bay during that time.

Over a third (36%) of the respondents expected the skills and qualifications required of their employees to change significantly in the next five years. The most significant change by far was expected to be in the demand for computer skills, followed by customer, interpersonal, communication and sales skills and technical skills. There was, however, a reluctance amongst employers to provide the appropriate training to meet the demands for these extra skills.

Few employers also thought that better trained and qualified job seekers, with marketing and advertising and better attitudes (application, motivation, commitment and personal care) were likely to be more important.

With regard to the industry which could be expected to contribute to employment growth for the region, tourism was identified by a third of all those responding as the most obvious, with a little over a quarter specifying horticulture and agriculture. Significantly fewer said (in priority order) wine/viticulture, forestry, manufacturing and food processing.

Participants were also asked to identify what they felt were major barriers to generating work opportunities in Hawkes Bay, and several popular responses were:

- economic climate/lack of confidence;
- lack of government support/development/incentives;
- population size and an ageing population; and
- divisions between Napier and Hastings City Councils.

There were other, less cited, barriers as well, including Hawkes Bay's distance from major markets (e.g. Auckland), central government bureaucracy, lack of growth in Hawkes Bay and the poor economy for primary producers.

“Need to promote Hawkes Bay as one region not two opposing, bickering cities. Promote cheap cost of living, great climate, cheap rent” (Hawkes Bay Employer).

“Promote Hawkes Bay's great climate, good land, own power company, Port of Napier. Council should be actively seeking and attracting New Zealand industries to Hawkes Bay” (Hawkes Bay Employer).

Summary and Conclusions

The 1990s represent a decade of continued and significant structural adjustment to New Zealand's economy and society, with particular implications for regional economies such as Hawkes Bay. A considerably decreased level of state intervention and subsidy, for both the primary and manufacturing sectors, the deregulation of the labour market, significant changes to welfare, the increasing privatisation of health and education, financial deregulation and an emphasis on competing in a new global economy, all represent new opportunities and challenges for employers, disrupting and altering the way in which many things had traditionally been done. This survey took place 13 years after the reforming Labour Government came to power, followed by further reforms in the early 1990s by a National Government. It provides a snapshot of employer practices and policies, and where they see Hawkes Bay heading.

Some of the shape of the Hawkes Bay economy is confirmed by this survey: the seasonality of a lot of activity, the relatively narrow overseas client base in just a few sectors, the reliance on part-time and casual labour for a number of firms and industries, and the pressure on local employers to alter what they do to meet changed domestic and/or international circumstances.

In recruiting employees, what was most striking was the use of personal networks (friends and relations) and the search for certain personal characteristics (motivation, appearance and presentation, confidence). The reliance on informal recruitment networks and the emphasis on personal characteristics have been reported in other surveys, and it reaffirms the importance of personal aspects in the search for reliable and effective employees. Work-related experience and skills were also seen as important, especially when it came to employers identifying what was most difficult to find when employing staff.

The information age, with its reliance on information and communication technologies across a wide range of economic activities only gets passing acknowledgement by Hawkes Bay employers. Market research, upskilling and computer and software training employers for matters such as customer services, physical health and safety and interpersonal skills. Similarly, in terms of indicating the important influences or the number of staff that are employed, skill levels or research and development are ranked as unimportant by most respondents. The one exception was that a third expected the skills and qualifications to change over the next five years, and here computing skills did make an appearance. There are signs throughout the survey that employers have changed their approach through the 1980s and 1990s, but still little appreciation of the impact of the information age on their particular activities, either in terms of influencing what they do or what they look for in employees.

Finally, most, and especially the larger firms, did expect to employ more people in the future. The factors that were considered important – labour costs, market size, competition, and consumer/economic confidence – all signal the focus on costs and confidence that are essential to economy activity in a new type of economy. There is hope that tourism will be a growing activity, along with a continuing commitment to

horticulture and agriculture. The barriers identified included demographic issues (size, ageing population), lack of government support, confidence and divisions at a local authority level. We hope this survey reflects local realities and contributes, in a modest way, to a more prosperous future for all the people of Hawkes Bay.

Appendix 1: Major Categories Used By NZSIC

Agriculture, Hunting, Forestry and Fishing

- 11 Agriculture and Hunting
- 12 Forestry and Logging
- 13 Fishing

Mining and Quarrying

- 21 Coal Mining
- 22 Crude Petroleum and Natural Gas Production
- 23 Metal Ore Mining
- 24 Other Mining and Quarrying

Manufacturing

- 31 Food, Beverage, Tobacco
- 32 Textile, Apparel and Leathergoods
- 33 Wood Processing and Wood Product Manufacture
- 34 Manufacturing of Paper and Paper Products; Printing and Publishing
- 35 Manufacture of Chemicals, and of Chemical, Petroleum, Coal, Rubber and Plastic Products
- 36 Concrete, Clay, Glass, Plaster, Masonry, Asbestos and Related Mineral Product Manufacture
- 37 Basic Metal Industries
- 38 Manufacture of Fabricated Metal Products, Machinery and Equipment
- 39 Other Manufacturing Industries

Electricity, Gas and Water

- 41 Electricity, Gas and Steam
- 42 Water Works and Supply

Construction

- 51 Construction of Buildings
- 52 Construction Other Than Buildings
- 53 Ancillary Construction Services

Wholesale and Retail Trade and Restaurants and Hotels

- 61 Wholesale Trade
- 62 Retail Trade
- 63 Restaurants and Hotels

Transport, Storage and Communication

- 71 Transport and Storage
- 72 Communication

Business and Financial Services

- 81 Financing
- 82 Insurance
- 83 Real Estate and Business Services

Community, Social and Personal Services

- 91 Public Administration and Defence
- 92 Sanitary and Cleaning Services
- 93 Social and Related Community Services
- 94 Recreational and Cultural Services
- 95 Personal and Household Services
- 96 International and Extra-territorial Bodies

Appendix 2: Frequency Tables in Response to Specific Questions

NZSIC Categories

		Frequency	Percent	Valid Percent
Valid	Agriculture, Hunting, Forestry and Fishing	111	11.6	11.7
	Manufacturing	132	13.8	13.9
	Electricity, Gas and Water	12	1.3	1.3
	Construction	61	6.4	6.4
	Wholesale/Retail, Restaurants & Hotels	304	31.7	31.9
	Transport, Storage & Communication	60	6.3	6.3
	Business & Financial Services	89	9.3	9.3
	Community, Social and Personal Services	183	19.1	19.2
	Total	952	99.2	100
Missing	System	8	0.8	
Total		960	100	

Recruit Staff via School, Polytechnic, Other Training Providers

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	70	7.3	44	44
	Ranked Second	49	5.1	30.8	74.8
	Ranked Third	40	4.2	25.2	100
	Total	159	16.6	100	
Missing	System	801	83.4		
Total		960	100		

Recruit Staff via Other Businesses

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	45	4.7	41.7	41.7
	Ranked Second	34	3.5	31.5	73.1
	Ranked Third	29	3	26.9	100
	Total	108	11.3	100	
Missing	System	852	88.8		
Total		960	100		

Recruit Staff via Employer Networks

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	67	7	42.9	42.9
	Ranked Second	44	4.6	28.2	71.2
	Ranked Third	45	4.7	28.8	100
	Total	156	16.3	100	
Missing	System	804	83.8		
Total		960	100		

Recruit Staff via Service Organisations

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	6	0.6	33.3	33.3
	Ranked Second	7	0.7	38.9	72.2
	Ranked Third	5	0.5	27.8	100
	Total	18	1.9	100	
Missing	System	942	98.1		
Total		960	100		

Recruit Staff via Job Agencies

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	44	4.6	32.8	32.8
	Ranked Second	53	5.5	39.6	72.4
	Ranked Third	37	3.9	27.6	100
	Total	134	14	100	
Missing	System	826	86		
Total		960	100		

Recruit Staff via NZ Employment Service

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	95	9.9	35.7	35.7
	Ranked Second	92	9.6	34.6	70.3
	Ranked Third	79	8.2	29.7	100
	Total	266	27.7	100	
Missing	System	694	72.3		
Total		960	100		

Recruit Staff via Friends / Relations

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	165	17.2	49.8	49.8
	Ranked Second	105	10.9	31.7	81.6
	Ranked Third	61	6.4	18.4	100
	Total	331	34.5	100	
Missing	System	629	65.5		
Total		960	100		

Recruit Staff via Advertising

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	295	30.7	54.5	54.5
	Ranked Second	156	16.3	28.8	83.4
	Ranked Third	90	9.4	16.6	100
	Total	541	56.4	100	
Missing	System	419	43.6		
Total		960	100		

Recruit Staff via Internal Promotion

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	51	5.3	31.5	31.5
	Ranked Second	60	6.3	37	68.5
	Ranked Third	51	5.3	31.5	100
	Total	162	16.9	100	
Missing	System	798	83.1		
Total		960	100		

Recruit Staff via Other Means

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Ranked First	59	6.1	50	50
	Ranked Second	28	2.9	23.7	73.7
	Ranked Third	31	3.2	26.3	100
	Total	118	12.3	100	
Missing	System	842	87.7		
Total		960	100		

Currently Employ ACC Client Job-seekers

		Frequency	Percent	Valid Percent
Valid	Yes	68	7.1	8.2
	No	758	79	91.8
	Total	826	86	100
Missing	System	134	14	
Total		960	100	

Currently Employ Registered Beneficiaries Unemployed Job-seekers

		Frequency	Percent	Valid Percent
Valid	Yes	129	13.4	15.3
	No	712	74.2	84.7
	Total	841	87.6	100
Missing	System	119	12.4	
Total		960	100	

Currently Employ Domestic Purposes Benefit Job-seekers

		Frequency	Percent	Valid Percent
Valid	Yes	95	9.9	11.7
	No	717	74.7	88.3
	Total	812	84.6	100
Missing	System	148	15.4	
Total		960	100	

Currently Employ Job-seekers with Criminal Convictions

		Frequency	Percent	Valid Percent
Valid	Yes	55	5.7	6.8
	No	749	78	93.2
	Total	804	83.8	100
Missing	System	156	16.3	
Total		960	100	

Currently Employ Physically Disabled Job-seekers

		Frequency	Percent	Valid Percent
Valid	Yes	58	6	7.1
	No	754	78.5	92.9
	Total	812	84.6	100
Missing	System	148	15.4	
Total		960	100	

Currently Employ Mentally Retarded Job-seekers

		Frequency	Percent	Valid Percent
Valid	Yes	40	4.2	5
	No	759	79.1	95
	Total	799	83.2	100
Missing	System	161	16.8	
Total		960	100	

Would Wage Subsidies Encourage Employer to Hire Disadvantaged Job-seekers?

		Frequency	Percent	Valid Percent
Valid	No	614	64	64
	Yes	346	36	36
	Total	960	100	100

Would Work Experience Encourage Employer to Hire Disadvantaged Job-seekers?

		Frequency	Percent	Valid Percent
Valid	No	660	68.8	68.8
	Yes	300	31.3	31.3
	Total	960	100	100

Would Pre-employment Training Encourage Employer to Hire Disadvantaged Job-seekers?

		Frequency	Percent	Valid Percent
Valid	No	783	81.6	81.6
	Yes	177	18.4	18.4
	Total	960	100	100

Would Supported On-job Training Encourage Employer to Hire Disadvantaged Job-seekers?

		Frequency	Percent	Valid Percent
Valid	No	812	84.6	84.6
	Yes	148	15.4	15.4
	Total	960	100	100

Would Other Support Encourage Employer to Hire Disadvantaged Job-seekers?

		Frequency	Percent	Valid Percent
Valid	No	914	95.2	95.2
	Yes	46	4.8	4.8
	Total	960	100	100

Initiatives Which Would Encourage Employers to Hire Disadvantaged Job-seekers

	Frequency	Percent	Valid Percent
No Options Chosen	384	40	40
Other Support	20	2.1	2.1
Supported On-job Training	22	2.3	2.3
Pre-employment Training	24	2.5	2.5
Pre-employment Training + Other Support	1	0.1	0.1
Pre-employment Training + Supported On-job Training	13	1.4	1.4
Pre-employment Training + Supported on-job Training + Other	1	0.1	0.1
Work Experience	107	11.1	11.1
Work Experience + Other Support	2	0.2	0.2
Work Experience + Supported On-Job Training	6	0.6	0.6
Work Experience + Pre-employment Training	27	2.8	2.8
Work Exp. + Pre-empl. Training + Supported On-job Trng.	6	0.6	0.6
Work Exp. + Pre-emp.Trng. + Supported On-job Trng. + Other	1	0.1	0.1
Wage Subsidies	133	13.9	13.9
Wage Subsidies + Other Support	5	0.5	0.5
Wage Subsidies + Supported on-job Training	34	3.5	3.5
Wage Subsidies + Supported On-job Trng. + Other Support	1	0.1	0.1
Wage Subsidies + Pre-employment Training	17	1.8	1.8
Wage Subsidies + Pre-emp. Trng. + Supported On-job Trng.	5	0.5	0.5
Wage Subsidies + Work Experience	57	5.9	5.9
Wage Subsidies + Work Exp. + Other Support	1	0.1	0.1
Wage Subsidies + Work Experience + Supported On-job Training	10	1	1
Wage Subsidies + Work Exp. + Supported On-job Trng. + Other	1	0.1	0.1
Wage Subsidies + Work Experience + Pre-emp. Training	33	3.4	3.4
Wage Subsidies + Work Exp. + Pre-emp. Trng. + Other Support	1	0.1	0.1
Wage Subsidies + Work Exp. + Pre-emp. Trng. + Supp. On-job Training	36	3.8	3.8
All Options Chosen	12	1.3	1.3
Total	960	100	100

**Important Qualities When Employing Staff:
Motivation**

		Frequency	Percent	Valid Percent
Valid	Unimportant	6	0.6	0.7
	Important	39	4.1	4.3
	Very Important	857	89.3	95
	Total	902	94	100
Missing	System	58	6	
Total		960	100	

**Important Qualities When Employing Staff:
Appearance & Presentation**

		Frequency	Percent	Valid Percent
Valid	Unimportant	47	4.9	5.3
	Important	193	20.1	21.7
	Very Important	651	67.8	73.1
	Total	891	92.8	100
Missing	System	69	7.2	
Total		960	100	

**Important Qualities When Employing Staff:
Confidence**

		Frequency	Percent	Valid Percent
Valid	Unimportant	27	2.8	3.1
	Important	226	23.5	25.6
	Very Important	629	65.5	71.3
	Total	882	91.9	100
Missing	System	78	8.1	
Total		960	100	

Important Qualities When Employing Staff: Previous Employment History

		Frequency	Percent	Valid Percent
Valid	Unimportant	80	8.3	9.2
	Important	266	27.7	30.6
	Very Important	522	54.4	60.1
	Total	868	90.4	100
Missing	System	92	9.6	
Total		960	100	

Important Qualities When Employing Staff: Work-related Skills

		Frequency	Percent	Valid Percent
Valid	Unimportant	65	6.8	7.5
	Important	203	21.1	23.3
	Very Important	603	62.8	69.2
	Total	871	90.7	100
Missing	System	89	9.3	
Total		960	100	

Important Qualities When Employing Staff: Experience in Industry

		Frequency	Percent	Valid Percent
Valid	Unimportant	139	14.5	16.1
	Important	279	29.1	32.2
	Very Important	448	46.7	51.7
	Total	866	90.2	100
Missing	System	94	9.8	
Total		960	100	

Important Qualities When Employing Staff: Previous Training

		Frequency	Percent	Valid Percent
Valid	Unimportant	144	15	16.9
	Important	320	33.3	37.6
	Very Important	388	40.4	45.5
	Total	852	88.8	100
Missing	System	108	11.3	
Total		960	100	

Important Qualities When Employing Staff: Qualifications

		Frequency	Percent	Valid Percent
Valid	Unimportant	184	19.2	22.3
	Important	328	34.2	39.8
	Very Important	313	32.6	37.9
	Total	825	85.9	100
Missing	System	135	14.1	
Total		960	100	

Important Qualities When Employing Staff: Other

		Frequency	Percent	Valid Percent
Valid	Unimportant	18	1.9	12.9
	Important	20	2.1	14.3
	Very Important	102	10.6	72.9
	Total	140	14.6	100
Missing	System	820	85.4	
Total		960	100	

Difficult Qualities to Find When Employing Staff: Motivation

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	162	16.9	19.5	19.5
	Difficult	362	37.7	43.6	63.1
	Very Difficult	306	31.9	36.9	100
	Total	830	86.5	100	
Missing	System	130	13.5		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Appearance & Presentation

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	267	27.8	32.9	32.9
	Difficult	459	47.8	56.5	89.4
	Very Difficult	86	9	10.6	100
	Total	812	84.6	100	
Missing	System	148	15.4		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Confidence

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	159	16.6	19.7	19.7
	Difficult	533	55.5	66	85.7
	Very Difficult	115	12	14.3	100
	Total	807	84.1	100	
Missing	System	153	15.9		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Previous Employment History

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	228	23.8	29	29
	Difficult	438	45.6	55.7	84.7
	Very Difficult	120	12.5	15.3	100
	Total	786	81.9	100	
Missing	System	174	18.1		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Work-related Skills

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	147	15.3	18.2	18.2
	Difficult	432	45	53.6	71.8
	Very Difficult	227	23.6	28.2	100
	Total	806	84	100	
Missing	System	154	16		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Experience in Industry

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	155	16.1	19.4	19.4
	Difficult	365	38	45.7	65.1
	Very Difficult	279	29.1	34.9	100
	Total	799	83.2	100	
Missing	System	161	16.8		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Previous Training

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	159	16.6	20.1	20.1
	Difficult	398	41.5	50.4	70.5
	Very Difficult	233	24.3	29.5	100
	Total	790	82.3	100	
Missing	System	170	17.7		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Qualifications

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	186	19.4	25.1	25.1
	Difficult	365	38	49.2	74.3
	Very Difficult	191	19.9	25.7	100
	Total	742	77.3	100	
Missing	System	218	22.7		
Total		960	100		

Difficult Qualities to Find When Employing Staff: Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Difficult	21	2.2	28.4	28.4
	Difficult	19	2	25.7	54.1
	Very Difficult	34	3.5	45.9	100
	Total	74	7.7	100	
Missing	System	886	92.3		
Total		960	100		

Employer Provides Induction Programmes for New Staff

		Frequency	Percent	Valid Percent
Valid	Yes	525	54.6	62.6
	No	313	32.5	37.4
	Total	838	87.1	100
Missing	System	124	12.9	
Total		962	100	

Employer Provides On-the-job Training

		Frequency	Percent	Valid Percent
Valid	Yes	851	88.5	95.3
	No	42	4.4	4.7
	Total	893	92.8	100
Missing	System	69	7.2	
Total		962	100	

Employer Provides Internal Staff Development Courses

		Frequency	Percent	Valid Percent
Valid	Yes	403	41.9	49.7
	No	408	42.4	50.3
	Total	811	84.3	100
Missing	System	151	15.7	
Total		962	100	

Employer Provides External Staff Development Courses

		Frequency	Percent	Valid Percent
Valid	Yes	433	45	52.8
	No	387	40.2	47.2
	Total	820	85.2	100
Missing	System	142	14.8	
Total		962	100	

Employer Provides Childcare Facilities

		Frequency	Percent	Valid Percent
Valid	Yes	28	2.9	3.5
	No	778	80.5	96.5
	Total	806	83.4	100
Missing	System	160	16.6	
Total		966	100	

Employer Provides Family Friendly Work Practices

		Frequency	Percent	Valid Percent
Valid	Yes	575	59.5	68.5
	No	264	27.3	31.5
	Total	839	86.9	100
Missing	System	127	13.1	
Total		966	100	

Employer Provides Staff Support (eg counseling, stress management)

		Frequency	Percent	Valid Percent
Valid	Yes	388	40.2	48.8
	No	407	42.1	51.2
	Total	795	82.3	100
Missing	System	171	17.7	
Total		966	100	

Most Important Training Needs: Computer/Software Training

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	318	33.1	40.3	40.3
	Important	257	26.8	32.5	72.8
	Very Important	215	22.4	27.2	100
	Total	790	82.3	100	
Missing	System	170	17.7		
Total		960	100		

Most Important Training Needs: Customer Services

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	99	10.3	12	12
	Important	168	17.5	20.3	32.3
	Very Important	560	58.3	67.7	100
	Total	827	86.1	100	
Missing	System	133	13.9		
Total		960	100		

Most Important Training Needs: Time Management

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	95	9.9	11.8	11.8
	Important	350	36.5	43.5	55.3
	Very Important	360	37.5	44.7	100
	Total	805	83.9	100	
Missing	System	155	16.1		
Total		960	100		

Most Important Training Needs: Financial Management

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	278	29	35.3	35.3
	Important	354	36.9	45	80.3
	Very Important	155	16.1	19.7	100
	Total	787	82	100	
Missing	System	173	18		
Total		960	100		

Most Important Training Needs: Business Planning

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	288	30	37.1	37.1
	Important	308	32.1	39.6	76.7
	Very Important	181	18.9	23.3	100
	Total	777	80.9	100	
Missing	System	183	19.1		
Total		960	100		

Most Important Training Needs: Physical Health & Safety

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	84	8.8	10.4	10.4
	Important	269	28	33.4	43.8
	Very Important	453	47.2	56.2	100
	Total	806	84	100	
Missing	System	154	16		
Total		960	100		

Most Important Training Needs: Quality Management

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	118	12.3	15.2	15.2
	Important	266	27.7	34.2	49.4
	Very Important	393	40.9	50.6	100
	Total	777	80.9	100	
Missing	System	183	19.1		
Total		960	100		

Most Important Training Needs: Exporting

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	606	63.1	82.4	82.4
	Important	76	7.9	10.3	92.8
	Very Important	53	5.5	7.2	100
	Total	735	76.6	100	
Missing	System	225	23.4		
Total		960	100		

Most Important Training Needs: Marketing Research

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	429	44.7	57.1	57.1
	Important	212	22.1	28.2	85.4
	Very Important	110	11.5	14.6	100
	Total	751	78.2	100	
Missing	System	209	21.8		
Total		960	100		

Most Important Training Needs: Interpersonal Skills

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	95	9.9	12.1	12.1
	Important	251	26.1	32	44.1
	Very Important	439	45.7	55.9	100
	Total	785	81.8	100	
Missing	System	175	18.2		
Total		960	100		

Most Important Training Needs: Upskilling - Completing a Qualification

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	235	24.5	32.7	32.7
	Important	303	31.6	42.1	74.8
	Very Important	181	18.9	25.2	100
	Total	719	74.9	100	
Missing	System	241	25.1		
Total		960	100		

Most Important Training Needs: Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	39	4.1	46.4	46.4
	Important	14	1.5	16.7	63.1
	Very Important	31	3.2	36.9	100
	Total	84	8.8	100	
Missing	System	876	91.3		
Total		960	100		

Incentives & Rewards Offered to Staff

		Frequency	Percent	Valid Percent
Valid	Bonuses	419	43.6	67
	Performance Pay	170	17.7	27.2
	Other	36	3.8	5.8
	Total	625	65.1	100
Missing	System	335	34.9	
Total		960	100	

Significant Factors that Influence Pay Rates: Qualifications

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Significant	209	21.8	27.2	27.2
	Significant	360	37.5	46.9	74.2
	Very Significant	198	20.6	25.8	100
	Total	767	79.9	100	
Missing	System	193	20.1		
Total		960	100		

Significant Factors that Influence Pay Rates: Skills

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Significant	47	4.9	5.7	5.7
	Significant	187	19.5	22.8	28.6
	Very Significant	585	60.9	71.4	100
	Total	819	85.3	100	
Missing	System	141	14.7		
Total		960	100		

Significant Factors that Influence Pay Rates: Profitability

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Significant	113	11.8	14.7	14.7
	Significant	222	23.1	28.8	43.5
	Very Significant	435	45.3	56.5	100
	Total	770	80.2	100	
Missing	System	190	19.8		
Total		960	100		

Significant Factors that Influence Pay Rates: Market Rates

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Significant	134	14	18.2	18.2
	Significant	313	32.6	42.5	60.7
	Very Significant	290	30.2	39.3	100
	Total	737	76.8	100	
Missing	System	223	23.2		
Total		960	100		

Significant Factors that Influence Pay Rates: Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not at all Significant	28	2.9	22.4	22.4
	Significant	14	1.5	11.2	33.6
	Very Significant	83	8.6	66.4	100
	Total	125	13	100	
Missing	System	835	87		
Total		960	100		

Important Influences on the Number of Staff Employed: Climate (weather)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	480	50	57.5	57.5
	Important	192	20	23	80.5
	Very Important	163	17	19.5	100
	Total	835	87	100	
Missing	System	125	13		
Total		960	100		

Important Influences on the Number of Staff Employed: Economic Confidence

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	173	18	20.4	20.4
	Important	332	34.6	39.2	59.7
	Very Important	341	35.5	40.3	100
	Total	846	88.1	100	
Missing	System	114	11.9		
Total		960	100		

Important Influences on the Number of Staff Employed: Consumer Confidence

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	168	17.5	20.1	20.1
	Important	310	32.3	37.1	57.2
	Very Important	357	37.2	42.8	100
	Total	835	87	100	
Missing	System	125	13		
Total		960	100		

Important Influences on the Number of Staff Employed: Exchange Rates

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	462	48.1	56.6	56.6
	Important	223	23.2	27.3	83.9
	Very Important	131	13.6	16.1	100
	Total	816	85	100	
Missing	System	144	15		
Total		960	100		

Important Influences on the Number of Staff Employed: Overseas Markets/International Influences & Trends

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	469	48.9	57.5	57.5
	Important	200	20.8	24.5	82
	Very Important	147	15.3	18	100
	Total	816	85	100	
Missing	System	144	15		
Total		960	100		

Important Influences on the Number of Staff Employed: Government Policies - Compliance Costs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	258	26.9	31.3	31.3
	Important	324	33.8	39.3	70.6
	Very Important	242	25.2	29.4	100
	Total	824	85.8	100	
Missing	System	136	14.2		
Total		960	100		

Important Influences on the Number of Staff Employed: Local Government/ Bureaucracy/ Interference/ Complication/ Difference

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	316	32.9	38.8	38.8
	Important	337	35.1	41.3	80.1
	Very Important	162	16.9	19.9	100
	Total	815	84.9	100	
Missing	System	145	15.1		
Total		960	100		

Important Influences on the Number of Staff Employed: Competition

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	139	14.5	16.7	16.7
	Important	294	30.6	35.3	51.9
	Very Important	401	41.8	48.1	100
	Total	834	86.9	100	
Missing	System	126	13.1		
Total		960	100		

Important Influences on the Number of Staff Employed: Political Stability

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	271	28.2	33.1	33.1
	Important	324	33.8	39.6	72.6
	Very Important	224	23.3	27.4	100
	Total	819	85.3	100	
Missing	System	141	14.7		
Total		960	100		

Important Influences on the Number of Staff Employed: Labour Costs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	136	14.2	16.2	16.2
	Important	376	39.2	44.8	61
	Very Important	327	34.1	39	100
	Total	839	87.4	100	
Missing	System	121	12.6		
Total		960	100		

Important Influences on the Number of Staff Employed: Availability of Labour

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	258	26.9	32.4	32.4
	Important	331	34.5	41.6	74
	Very Important	207	21.6	26	100
	Total	796	82.9	100	
Missing	System	164	17.1		
Total		960	100		

Important Influences on the Number of Staff Employed: Capital Replacement - Technology

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	296	30.8	36.6	36.6
	Important	330	34.4	40.8	77.5
	Very Important	182	19	22.5	100
	Total	808	84.2	100	
Missing	System	152	15.8		
Total		960	100		

Important Influences on the Number of Staff Employed: Market Size

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	138	14.4	16.9	16.9
	Important	278	29	34.1	51
	Very Important	400	41.7	49	100
	Total	816	85	100	
Missing	System	144	15		
Total		960	100		

Important Influences on the Number of Staff Employed: Skill Levels

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	183	19.1	22.9	22.9
	Important	334	34.8	41.8	64.6
	Very Important	283	29.5	35.4	100
	Total	800	83.3	100	
Missing	System	160	16.7		
Total		960	100		

Important Influences on the Number of Staff Employed: Product Development (R&D)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	373	38.9	48.2	48.2
	Important	277	28.9	35.8	84
	Very Important	124	12.9	16	100
	Total	774	80.6	100	
Missing	System	186	19.4		
Total		960	100		

Important Influences on the Number of Staff Employed: Transport

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	416	43.3	58.2	58.2
	Important	214	22.3	29.9	88.1
	Very Important	85	8.9	11.9	100
	Total	715	74.5	100	
Missing	System	245	25.5		
Total		960	100		

Important Influences on the Number of Staff Employed: Other

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Unimportant	65	6.8	64.4	64.4
	Important	18	1.9	17.8	82.2
	Very Important	18	1.9	17.8	100
	Total	101	10.5	100	
Missing	System	859	89.5		
Total		960	100		

Number of Staff Employed in 1994

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	0-5	445	46.4	55	55
	6-10	172	17.9	21.3	76.3
	11-20	92	9.6	11.4	87.6
	21-50	60	6.3	7.4	95.1
	51-100	24	2.5	3	98
	101+	16	1.7	2	100
	Total	809	84.3	100	
Missing	System	151	15.7		
Total		960	100		

Number of Staff Anticipated To Be Employed in 2000 (as at 1987)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	0-5	374	39	43.2	43.2
	6-10	230	24	26.6	69.8
	11-20	132	13.8	15.3	85.1
	21-50	75	7.8	8.7	93.8
	51-100	24	2.5	2.8	96.5
	101+	30	3.1	3.5	100
	Total	865	90.1	100	
Missing	System	95	9.9		
Total		960	100		