



December 2024

01. Research Questions

During the pandemic, many businesses – from different industries and locations – complained about worker shortages. Although the economy is now free from pandemic-related restrictions, the issue of worker shortages has barely improved in many NSW regions. This has prompted the question of where workers have gone. This research note sets out to examine this issue by answering the following questions using labour force data from the Australian Bureau of Statistics:

1. Has NSW lost workers to other states and territories? If so, what are the affected industries?
2. What has been the net change of workers in each NSW region? What are the industries most affected?
3. How do pre-pandemic and post-pandemic employment growth rates compare in each region and industry?

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Key Findings

- NSW has achieved solid employment growth of 43% over the last two decades. Although this is below the national employment growth of 52% during the same period, it is higher than the NSW population growth of 27%. The employment-to-population ratio for NSW has also had a steady increase to 63.3% by October 2024 (from 58.9% two decades ago).
- Overall, NSW does not appear to have lost workers to other states and territories. The fall in employment numbers in certain sectors (Manufacturing and Information Media and Telecommunications) is more likely attributed to structural factors, as similar trends are observed in other states and territories.
- All regions of NSW recorded employment growth over the two decades to 2024. However, the employment growth rates vary from 1% in Far West and Orana to 48% in Sydney. The industry breakdown shows mixed results across different regions.
- Nine out of 15 regions in NSW have experienced faster average annual employment growth since the start of COVID. Only one region has experienced a decline in jobs since COVID.
- In NSW, the industries that have experienced a decline in job numbers since COVID are Accommodation and Food Services; Administrative and Support Services; Agriculture, Forestry and Fishing; Mining; Other Services; and Wholesale Trade. Jobs in Information Media and Technology have been falling since before COVID.
- In NSW, the industries that have experienced faster employment growth since COVID are Construction; Education and Training; Electricity, Gas, Water and Waste Services; Health Care and Social Assistance; and Rental, Hiring and Real Estates Services. Manufacturing jobs had been in decline prior to COVID, but have rebounded and recorded modest growth since COVID.

Implications

- Whilst employment growth (for both NSW and Australia) has been solid in the last two decades, productivity growth has been lacklustre. Using the ABS measure of 'GDP per hour worked', productivity at a national level has increased by an average of 0.7% a year since 2004. However, data for the September quarter 2024 show that productivity is 5.7% below its peak recorded in the March quarter of 2022. The ongoing challenge of 'worker shortages' is more likely attributed to productivity issues than the size of the workforce. This has policy implications for skills development.
- Business NSW has a range of policy recommendations in the recently published **State of Skills 2024** report. The recommendations cover the following areas:
 - Strengthening investment in vocational education and training (VET)
 - Ensuring industry engagement
 - Widening participation in education and work
 - Enhancing skilled migration pathways
 - Meeting regional skill needs.

02. Employment by state

The 'Health Care and Social Assistance' industry is the largest employer in all states and territories, except the ACT. In NSW, there are 685,700 people working in this industry, making up about 15% of total employment in the state. The next most significant employing industries in NSW are Professional, Scientific and Technical Services (with 456,100 workers), Retail Trade (415,700 workers), Education and Training (399,200 workers) and Construction (385,200 workers).

Table 1: Number of employed persons (thousands, August quarter 2024)

	NSW	ACT	NT	QLD	SA	TAS	VIC	WA	AUS
Accommodation and Food Services	306.2	15.9	8.3	232.9	58.9	22.0	218.5	102.1	964.9
Administrative and Support Services	125.5	6.3	4.3	90.3	35.5	7.7	118.5	54.3	442.4
Agriculture, Forestry and Fishing	94.9	0.2	3.4	64.4	33.8	13.4	81.0	32.4	323.4
Arts and Recreation Services	78.8	5.3	4.5	57.2	16.8	5.8	75.4	27.4	271.1
Construction	385.2	18.6	11.3	270.1	81.8	27.5	354.4	152.8	1,301.7
Education and Training	399.2	25.1	13.4	249.0	77.4	23.7	339.8	139.1	1,266.7
Electricity, Gas, Water and Waste Services	46.1	2.4	3.0	55.3	12.8	4.8	57.9	25.7	208.1
Financial and Insurance Services	232.0	5.3	1.3	69.2	23.1	4.5	164.6	26.4	526.4
Health Care and Social Assistance	685.7	35.4	28.7	443.2	173.7	47.7	598.1	237.9	2,250.4
Information Media and Telecommunications	72.9	2.9	0.9	24.7	9.6	4.1	57.3	12.3	184.7
Manufacturing	228.4	4.7	3.5	180.5	72.7	19.1	292.5	77.0	878.4
Mining	34.1	0.2	3.5	71.1	13.2	3.1	13.0	155.0	293.1
Other Services	146.5	8.3	5.3	117.5	36.5	9.9	139.2	55.7	518.9
Professional, Scientific and Technical Services	456.1	31.4	8.3	220.1	68.3	17.4	369.2	135.3	1,306.2
Public Administration and Safety	291.6	78.5	20.5	215.2	55.8	22.7	191.8	101.5	977.5
Rental, Hiring and Real Estate Services	90.0	4.7	1.6	58.1	16.1	3.4	60.6	22.5	256.9
Retail Trade	415.7	16.0	9.7	300.6	93.3	26.3	338.7	135.4	1,335.6
Transport, Postal and Warehousing	237.2	5.1	6.0	143.9	37.9	8.7	186.3	79.8	705.0
Wholesale Trade	121.6	2.0	1.7	78.0	24.6	6.0	109.3	42.1	385.4
Total	4,447.6	268.3	139.2	2,941.3	941.7	277.7	3,766.2	1,614.9	14,396.8

Source: ABS

Note: Cells are shaded in each column with the largest employing industry having the darkest shade.

Over the last two decades, NSW has experienced a 43% growth in employment, which is below the national average of 52% and also the third slowest pace compared to other states and territories. However, employment growth (43%) has nevertheless outpaced population growth (27%). The employment-to-population ratio for NSW has moved from 58.9% in October 2004 to 63.3% in October 2024 (compared to a shift from 60.4% to 64.4% at the national level).

The magnitude of change in employment numbers differs across industries. The industries with the largest employment growth rate in NSW are Health Care and Social Assistance (122%), Professional, Scientific and Technical Services (97%) and Arts and Recreation Services (90%). On the other hand, the employment numbers in three industries have shrunk compared to 20 years ago, with the Manufacturing industry having the largest decline (-26%), followed by Information Media and Telecommunications (-11%) and Wholesale Trade (-5%).

These trends in NSW are broadly in line with other states and territories, especially as overall employment in Manufacturing and Information Media and Telecommunication fell at a national level. Whilst the NT is the only state/territory to have recorded an increase in Manufacturing jobs, its still-low number of Manufacturing jobs (3,500 from Table 1) means that it is not the reason behind the decline in Manufacturing jobs in other states and territories.

Table 2: Change in the number of employed persons from 2004 to 2024

	NSW	ACT	NT	QLD	SA	TAS	VIC	WA	AUS
Accommodation and Food Services	32%	31%	42%	75%	34%	39%	43%	83%	48%
Administrative and Support Services	12%	-1%	32%	47%	24%	9%	41%	44%	30%
Agriculture, Forestry and Fishing	7%	-62%	69%	-22%	-23%	-18%	0%	-30%	-10%
Arts and Recreation Services	90%	41%	154%	75%	58%	72%	77%	79%	79%
Construction	44%	90%	48%	65%	72%	97%	94%	84%	67%
Education and Training	75%	51%	69%	84%	53%	45%	85%	86%	78%
Electricity, Gas, Water and Waste Services	51%	45%	91%	230%	102%	58%	197%	187%	135%
Financial and Insurance Services	53%	100%	-9%	42%	14%	-10%	88%	-4%	53%
Health Care and Social Assistance	122%	138%	205%	150%	106%	103%	152%	157%	137%
Information Media and Telecommunications	-11%	-41%	-49%	-28%	-29%	3%	-2%	-23%	-14%
Manufacturing	-26%	-8%	20%	-1%	-25%	-14%	-9%	-12%	-15%
Mining	84%	226%	59%	214%	117%	48%	96%	288%	198%
Other Services	5%	24%	42%	48%	14%	11%	42%	17%	24%
Professional, Scientific and Technical Services	97%	88%	100%	111%	93%	89%	126%	127%	109%
Public Administration and Safety	70%	61%	-12%	89%	31%	41%	63%	93%	67%
Rental, Hiring and Real Estate Services	57%	65%	36%	41%	37%	18%	67%	9%	48%
Retail Trade	20%	-8%	-7%	33%	20%	6%	26%	16%	23%
Transport, Postal and Warehousing	44%	-1%	11%	43%	21%	-15%	62%	72%	47%
Wholesale Trade	-5%	-14%	-4%	8%	-15%	-10%	14%	2%	2%
Total	43%	50%	43%	61%	32%	31%	60%	66%	52%
Population growth	27%	44%	25%	44%	22%	19%	41%	49%	36%

Source: ABS

Note: Population growth refers to the change in population from October 2004 to March 2024.

Has the pandemic affected the employment growth trajectory? Table 3 shows the annual employment growth rates for Australia and also each state and territory before and since the pandemic. (Note: “Pre-COVID” covers the period of August 2004 to November 2019 and “Post-COVID” covers the period of November 2019 to August 2024.)

At a national level, employment growth averaged 2.0% a year before the pandemic and accelerated to 2.4% a year since the start of the pandemic. However, there are mixed results across the industries. Of the 19 key industries, only seven industries have recorded stronger employment growth since the pandemic and these industries are Education and Training; Financial and Insurance Services; Health Care and Social Assistance; Manufacturing; Public Administration and Safety; Rental, Hiring and Real Estate Services; and Transport, Postal and Warehousing. On the other hand, four industries have had shrinking employment numbers and these industries are Administrative and Support Services; Agriculture, Forestry and Fishing; Information Media and Telecommunications; and Wholesale Trade.

In NSW, average annual employment growth has been steady at 1.8% both before and since the pandemic. However, the industry breakdown shows a mixed picture. Seven industries have had faster employment growth since the pandemic and these industries are Construction; Education and Training; Electricity, Gas, Water and Waste Services; Financial and Insurance Services; Health Care and Social Assistance; Manufacturing; and Rental, Hiring and Real Estate Services. Seven industries have seen a decline in employment numbers since the pandemic and they are Accommodation and Food Services; Administrative and Support Services; Agriculture, Forestry and Fishing; Information Media and Telecommunications; Mining; Other Services; and Wholesale Trade.

Table 3: Average annual employment growth rates^

	NSW		ACT		NT		QLD		SA		TAS		VIC		WA		AUS	
	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID
Accommodation and Food Services	1.9%	-1.2%	0.9%	3.2%	2.8%	-1.6%	2.6%	1.6%	2.1%	-2.0%	2.1%	0.3%	2.0%	1.7%	2.9%	3.2%	2.2%	0.6%
Administrative and Support Services	1.6%	-2.3%	1.9%	-4.4%	3.0%	-6.3%	2.5%	1.6%	1.0%	0.6%	-0.5%	5.1%	2.6%	-1.9%	1.0%	2.4%	1.9%	-0.7%
Agriculture, Forestry and Fishing	0.0%	-2.2%	-5.8%	26.5%	3.4%	-1.8%	-0.9%	-0.4%	-1.9%	3.0%	-0.7%	-1.3%	-0.1%	1.8%	-1.6%	-3.5%	-0.6%	-0.3%
Arts and Recreation Services	3.8%	3.4%	1.0%	6.1%	4.7%	5.1%	2.7%	0.8%	0.9%	7.3%	4.8%	-7.4%	3.7%	1.7%	3.2%	3.0%	3.3%	2.4%
Construction	1.9%	2.7%	4.6%	-2.2%	1.9%	1.2%	2.7%	2.3%	3.0%	1.8%	2.9%	5.4%	3.6%	3.0%	2.8%	3.7%	2.7%	2.7%
Education and Training	2.2%	4.0%	2.4%	0.6%	2.9%	3.1%	3.0%	2.9%	2.9%	-0.4%	2.4%	1.0%	3.1%	2.7%	2.6%	4.6%	2.7%	3.0%
Electricity, Gas, Water and Waste Services	1.5%	1.7%	-0.6%	11.1%	2.4%	1.0%	4.1%	9.1%	4.5%	2.7%	0.6%	10.8%	6.2%	1.6%	5.7%	2.8%	3.9%	3.8%
Financial and Insurance Services	1.6%	4.4%	1.6%	7.3%	-0.2%	-1.3%	1.6%	2.0%	-0.1%	4.2%	-0.4%	-0.1%	2.5%	5.4%	0.4%	2.3%	1.7%	4.2%
Health Care and Social Assistance	3.8%	4.7%	3.5%	5.3%	4.9%	6.2%	4.8%	4.7%	2.9%	6.4%	3.7%	3.7%	4.0%	6.8%	3.7%	9.2%	4.0%	5.8%
Information Media and Telecommunications	-0.5%	-1.3%	-2.0%	0.2%	-1.4%	-4.5%	-0.2%	-2.1%	-0.7%	-5.8%	-1.9%	3.7%	0.7%	-1.6%	-1.7%	1.8%	-0.3%	-1.5%
Manufacturing	-1.2%	0.4%	-1.4%	3.0%	1.3%	-0.9%	-0.7%	2.8%	-2.1%	-0.2%	-1.1%	1.0%	-1.0%	0.0%	-0.1%	-1.8%	-1.0%	0.5%
Mining	4.2%	-0.3%	-13.8%	57.2%	3.1%	2.2%	7.8%	1.8%	4.7%	5.3%	2.0%	6.5%	6.0%	-2.8%	7.6%	4.3%	6.6%	2.7%
Other Services	1.0%	-1.1%	1.1%	-3.2%	4.0%	-1.7%	2.2%	0.5%	0.5%	2.3%	0.4%	0.8%	1.6%	1.0%	1.0%	2.4%	1.4%	0.4%
Professional, Scientific and Technical Services	3.8%	2.8%	3.0%	5.6%	3.3%	3.5%	3.6%	5.8%	3.4%	3.1%	3.2%	3.0%	4.7%	2.1%	4.3%	3.4%	4.0%	3.3%
Public Administration and Safety	2.5%	2.3%	2.1%	3.8%	-1.0%	1.7%	2.3%	4.7%	1.5%	1.9%	1.3%	4.0%	3.0%	0.5%	3.3%	1.8%	2.4%	2.5%
Rental, Hiring and Real Estate Services	0.8%	3.5%	0.4%	3.0%	3.6%	-2.1%	1.0%	2.6%	-0.2%	2.3%	0.4%	6.7%	2.8%	0.1%	0.6%	-1.2%	1.2%	1.9%
Retail Trade	1.0%	0.1%	-0.6%	0.2%	0.4%	-1.0%	0.5%	3.9%	0.9%	0.9%	0.4%	-0.1%	1.6%	0.2%	0.7%	1.0%	1.0%	1.0%
Transport, Postal and Warehousing	2.0%	1.6%	0.9%	0.1%	0.8%	-0.2%	1.9%	3.5%	1.3%	1.0%	0.3%	-0.3%	2.8%	1.5%	2.4%	4.4%	2.1%	2.2%
Wholesale Trade	0.2%	-1.3%	2.6%	-8.4%	3.0%	-6.1%	0.0%	0.0%	-0.8%	1.1%	-0.9%	-1.8%	1.0%	-0.2%	0.0%	1.6%	0.3%	-0.4%
Total	1.8%	1.8%	1.9%	2.6%	1.9%	1.3%	2.2%	3.1%	1.2%	2.0%	1.3%	2.0%	2.4%	2.1%	2.3%	3.4%	2.0%	2.4%

Source: ABS

Note: "Pre-COVID" is from August 2004 to November 2019; and "Post-COVID" is from November 2019 to August 2024.

^Growth rates are calculated on a compound basis.

03. Employment by region (NSW)

This section shows the employment numbers by NSW region. Almost every region currently counts Health Care and Social Assistance as the largest employing industry. The only two exceptions are Capital Region, which has Public Administration and Safety with the highest number of jobs; and New England North West, which has Agriculture, Forestry and Fishing.

Table 4: Number of employed persons (thousands, four-quarter average, August 2024)

	Sydney	Capital Region	Central Coast	Central West	Coffs Harbour - Grafton	Far West and Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
Accommodation and Food Services	185.8	7.0	12.5	7.9	5.2	2.9	12.3	9.7	5.0	3.4	3.1	18.8	8.5	5.3	6.2
Administrative and Support Services	86.1	2.5	6.7	2.4	1.7	2.0	3.3	3.3	3.2	0.7	1.1	3.4	4.5	2.3	3.3
Agriculture, Forestry and Fishing	10.8	5.9	0.3	7.2	5.9	2.7	1.4	0.4	5.5	4.4	21.2	0.4	3.0	9.7	1.3
Arts and Recreation Services	58.7	2.6	2.7	2.1	0.7	1.0	2.5	3.3	2.1	0.3	0.4	3.5	1.5	1.8	2.5
Construction	252.6	17.7	20.4	10.3	6.8	5.1	15.7	16.6	7.8	7.8	5.0	18.1	12.2	3.8	6.8
Education and Training	235.1	8.4	11.9	8.9	7.1	7.2	10.1	16.4	10.3	7.2	13.7	18.6	10.3	8.8	6.5
Electricity, Gas, Water and Waste Services	24.5	0.9	2.0	2.1	0.9	0.5	1.4	2.1	0.8	1.3	1.0	1.8	1.3	0.4	0.4
Financial and Insurance Services	205.1	1.1	5.6	2.7	0.2	1.1	3.3	4.2	0.2	0.9	1.5	7.3	2.2	0.7	2.3
Health Care and Social Assistance	389.8	15.4	33.1	19.6	13.0	9.5	23.5	32.6	24.4	12.2	13.5	46.4	24.3	10.8	9.0
Information Media and Telecommunications	58.8	0.8	2.7	0.9	0.0	0.2	0.3	1.5	1.1	0.5	1.3	0.5	1.9	0.7	0.3
Manufacturing	167.0	7.0	10.8	8.4	1.6	1.5	11.0	13.6	6.1	4.9	2.9	11.5	5.7	8.1	3.6
Mining	2.9	1.1	0.3	10.7	0.2	0.8	8.4	1.4	1.3	0.0	1.6	4.4	0.1	0.0	1.0
Other Services	92.5	5.6	6.4	3.0	0.8	2.7	7.9	4.0	4.7	4.4	3.4	9.4	4.7	4.1	1.4
Professional, Scientific and Technical Services	367.0	10.7	12.5	3.2	3.8	0.8	8.1	11.5	3.5	2.8	4.9	16.2	11.6	2.6	7.2
Public Administration and Safety	159.3	20.6	9.6	10.6	4.9	5.9	8.6	11.8	6.3	5.1	6.7	11.9	4.4	5.7	5.6
Rental, Hiring and Real Estate Services	54.6	2.2	2.7	0.7	0.2	0.9	2.4	1.7	1.9	1.8	1.4	2.5	2.2	0.7	0.7
Retail Trade	244.6	13.5	18.8	11.3	5.7	4.9	14.1	15.3	10.9	5.5	14.0	19.8	15.1	6.2	4.0
Transport, Postal and Warehousing	173.6	4.9	6.4	4.9	0.9	2.6	5.8	9.8	3.5	3.9	3.2	9.0	6.0	3.0	3.7
Wholesale Trade	83.8	2.6	3.6	1.7	1.9	1.8	4.4	2.8	2.8	2.1	4.2	4.8	2.2	3.0	2.3
Total	2852.5	130.4	169.0	118.7	61.5	54.2	144.5	162.1	101.4	69.3	104.2	208.4	121.8	77.8	68.1

Source: ABS

Note: Cells are shaded in each column with the largest employing industry having the darkest shade.

Compared to 20 years ago, most regions have experienced an overall increase in employment numbers by at least 20%. Sydney has recorded the highest rate of employment growth (48%), followed closely by Hunter Valley (47%), Central West (46%) and Southern Highlands and Shoalhaven (46%). The two regions that have only modest employment growth over the 20-year period are Far West and Orana (1%) and Riverina (5%).

In the case of Far West and Orana, 11 out of 19 industries have had a decline in job numbers. The steepest job losses (in percentage terms) were seen in Information Media and Telecommunications, and Agriculture, Forestry and Fishing.

Similarly for Riverina, job numbers in nine out of 19 industries have shrunk.

Table 5: Change in the number of employed persons from 2004 to 2024

	Sydney	Capital Region	Central Coast	Central West	Coffs Harbour - Grafton	Far West and Orana	Hunter Valley exc Newcastle	Illawarra	Mid North Coast	Murray	New England and North West	Newcastle and Lake Macquarie	Richmond - Tweed	Riverina	Southern Highlands and Shoalhaven
Accommodation and Food Services	42%	0%	45%	31%	28%	-34%	-7%	14%	-33%	-28%	-49%	110%	-22%	-6%	31%
Administrative and Support Services	9%	33%	68%	-11%	51%	191%	3%	1%	114%	-62%	-12%	-35%	24%	78%	146%
Agriculture, Forestry and Fishing	9%	-7%	21%	-45%	125%	-71%	-58%	102%	45%	115%	64%	-44%	-60%	-34%	-24%
Arts and Recreation Services	119%	203%	265%	385%	-37%	-45%	269%	278%	274%	-61%	-44%	25%	-9%	217%	230%
Construction	62%	56%	44%	67%	9%	75%	81%	69%	-7%	66%	0%	16%	78%	-29%	-5%
Education and Training	78%	95%	56%	49%	64%	69%	100%	26%	102%	103%	75%	46%	-10%	19%	102%
Electricity, Gas, Water and Waste Services	40%	-15%	27%	326%	41%	-6%	27%	54%	-37%	277%	48%	-33%	4362%	-65%	209%
Financial and Insurance Services	66%	9%	11%	305%	-74%	32%	69%	-13%	-79%	-41%	-14%	96%	-34%	-37%	65%
Health Care and Social Assistance	119%	83%	116%	136%	509%	52%	144%	169%	198%	49%	26%	146%	101%	78%	85%
Information Media and Telecommunications	-8%	-61%	0%	3289%	-99%	-74%	-60%	-1%	77%	-45%	69%	-80%	19%	-37%	-77%
Manufacturing	-14%	13%	-23%	2%	-62%	-18%	19%	-7%	-14%	-42%	-60%	-34%	18%	-3%	-21%
Mining	15%	993%	2%	235%	*	-20%	31%	-12%	*	*	*	117%	-85%	-84%	29%
Other Services	8%	12%	12%	-20%	-75%	-3%	119%	0%	91%	149%	1%	18%	-7%	24%	-36%
Professional, Scientific and Technical Services	100%	95%	104%	49%	180%	-33%	205%	69%	39%	43%	41%	124%	176%	78%	323%
Public Administration and Safety	64%	75%	0%	138%	67%	111%	89%	67%	29%	47%	70%	57%	23%	9%	174%
Rental, Hiring and Real Estate Services	41%	41%	2%	-19%	-85%	154%	32%	-30%	318%	78%	1408%	34%	1%	35%	-58%
Retail Trade	23%	37%	-2%	22%	-36%	-26%	-4%	28%	-7%	6%	56%	-7%	40%	-4%	18%
Transport, Postal and Warehousing	51%	-6%	58%	89%	-8%	-25%	22%	59%	7%	97%	-15%	38%	131%	20%	56%
Wholesale Trade	-9%	-7%	-40%	-40%	75%	1%	40%	31%	55%	-4%	71%	2%	52%	60%	75%
Total	48%	41%	32%	46%	28%	1%	47%	44%	41%	27%	28%	38%	29%	5%	46%

Source: ABS

Note: * Analysis cannot be performed as the employment count at August 2004 is unavailable

Table 6 shows the employment growth rates before and since COVID:

- Nine regions have experienced faster employment growth since COVID - Capital Region, Central Coast, Central West, Far West and Orana, Illawarra, Mid North Coast, Murray, New England North West, and Southern Highlands and Shoalhaven;
- Four regions have experienced slower employment growth since COVID - Coffs Harbour-Grafton, Hunter Valley, Newcastle and Lake Macquarie, and Richmond-Tweed;
- One region (Sydney) has the same employment growth rate before and since COVID;
- One region (Riverina) has experienced a decline in jobs since COVID.

Table 6: Average annual employment growth rates^

	Sydney		Capital Region		Central Coast		Central West		Coffs Harbour - Grafton		Far West and Orana		Hunter Valley exc Newcastle	
	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID
Accommodation and Food Services	2.5%	-0.4%	4.2%	-12.3%	1.6%	2.7%	-0.1%	6.3%	3.8%	-6.5%	0.3%	-9.1%	-0.7%	0.9%
Administrative and Support Services	1.0%	-1.2%	4.6%	-8.1%	5.0%	-4.5%	0.0%	-2.3%	-0.6%	11.0%	8.7%	-4.3%	3.2%	-9.1%
Agriculture, Forestry and Fishing	-0.3%	2.9%	2.5%	-9.1%	4.2%	-8.8%	0.9%	-14.5%	-0.2%	19.5%	-5.9%	-6.4%	1.8%	-21.4%
Arts and Recreation Services	4.3%	2.9%	3.2%	14.0%	9.5%	-1.8%	3.0%	26.9%	-2.1%	-2.8%	-3.4%	-1.5%	3.8%	16.7%
Construction	2.1%	3.6%	-0.1%	10.0%	1.0%	4.6%	1.8%	5.2%	1.6%	-3.2%	3.0%	2.3%	3.3%	2.0%
Education and Training	2.6%	4.0%	5.0%	-1.6%	5.2%	-6.6%	1.5%	3.7%	0.3%	10.0%	1.0%	8.1%	4.7%	-0.3%
Electricity, Gas, Water and Waste Services	1.0%	3.9%	4.6%	-16.4%	1.6%	-0.1%	2.5%	25.1%	-3.6%	21.0%	-2.9%	8.4%	-2.8%	15.0%
Financial and Insurance Services	2.0%	4.4%	0.6%	-0.2%	-1.0%	5.5%	-0.6%	36.8%	5.0%	-35.6%	-6.0%	29.5%	0.9%	8.4%
Health Care and Social Assistance	3.8%	4.8%	2.5%	5.0%	2.8%	7.6%	4.0%	5.7%	11.4%	3.5%	0.5%	7.5%	4.6%	4.3%
Information Media and Telecommunications	-0.3%	-0.9%	-2.3%	-11.8%	-1.5%	5.0%	23.0%	8.1%	-4.1%	-62.4%	-1.2%	-21.9%	-5.0%	-2.6%
Manufacturing	-1.2%	0.8%	-1.3%	7.1%	-1.4%	-0.8%	0.3%	-0.5%	-5.0%	-4.1%	-1.6%	0.9%	-0.4%	5.2%
Mining	4.4%	-10.3%	18.4%	-3.7%	7.6%	-20.5%	0.5%	27.0%	*	-5.8%	5.5%	-19.6%	2.3%	-1.5%
Other Services	0.7%	-0.8%	0.4%	1.1%	2.5%	-5.3%	1.3%	-8.6%	-1.1%	-22.4%	0.2%	-1.3%	5.2%	0.1%
Professional, Scientific and Technical Services	3.8%	2.6%	2.0%	7.9%	3.2%	5.1%	3.3%	-1.8%	6.9%	0.1%	-4.0%	4.9%	7.6%	-0.1%
Public Administration and Safety	2.7%	1.8%	2.7%	3.1%	-0.2%	0.7%	3.2%	8.5%	-0.1%	11.8%	4.3%	2.1%	6.0%	-5.3%
Rental, Hiring and Real Estate Services	1.3%	3.3%	-25.8%	180.2%	1.5%	-4.1%	1.0%	-7.4%	-4.7%	-21.4%	-3.7%	37.5%	1.6%	0.9%
Retail Trade	1.6%	-0.9%	0.7%	4.5%	-1.4%	4.2%	0.5%	2.5%	-0.8%	-6.3%	-1.4%	-1.6%	-2.1%	6.0%
Transport, Postal and Warehousing	2.1%	2.0%	-1.5%	3.7%	4.5%	-4.3%	4.3%	-0.2%	4.5%	-14.9%	-0.3%	-4.9%	1.1%	0.5%
Wholesale Trade	0.2%	-2.7%	-4.8%	15.2%	-3.6%	1.0%	2.1%	-16.0%	-4.0%	28.1%	-8.7%	34.3%	0.1%	6.9%
Total	2.0%	2.0%	1.6%	2.1%	1.4%	1.5%	1.7%	2.8%	1.5%	0.5%	-0.3%	1.1%	2.2%	1.2%

Table 6: Average annual employment growth rates (continued)

	Illawarra		Mid North Coast		Murray		New England and North West		Newcastle and Lake Macquarie		Richmond - Tweed		Riverina		Southern Highlands and Shoalhaven	
	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID	Pre-COVID	Post-COVID
Accommodation and Food Services	2.7%	-5.8%	-0.6%	-6.3%	0.9%	-9.4%	-1.1%	-10.1%	3.4%	5.0%	1.2%	-8.6%	-3.0%	9.0%	1.1%	2.1%
Administrative and Support Services	2.3%	-6.7%	4.9%	0.6%	1.2%	-21.5%	4.3%	-15.0%	0.8%	-11.0%	0.0%	4.6%	3.7%	0.6%	4.8%	3.8%
Agriculture, Forestry and Fishing	7.6%	-8.4%	-1.8%	14.7%	7.8%	-7.5%	2.1%	3.8%	-2.4%	-4.4%	-2.2%	-11.5%	-2.4%	-0.8%	-8.6%	26.1%
Arts and Recreation Services	8.6%	1.4%	6.0%	9.4%	-4.0%	-6.5%	-3.2%	-1.7%	-1.3%	9.4%	4.2%	-14.0%	3.4%	14.7%	7.2%	3.0%
Construction	2.5%	3.2%	0.7%	-3.8%	-0.4%	12.8%	-0.7%	2.1%	2.6%	-5.1%	4.9%	-3.1%	2.5%	-14.1%	-2.4%	7.0%
Education and Training	0.5%	3.4%	0.9%	12.7%	-0.7%	18.7%	-0.2%	13.2%	1.3%	4.0%	-0.5%	-0.6%	0.5%	2.1%	1.8%	9.7%
Electricity, Gas, Water and Waste Services	-1.3%	14.3%	2.9%	-17.4%	-3.8%	49.8%	-9.7%	50.9%	-0.6%	-6.3%	31.3%	-7.1%	6.6%	-34.7%	10.2%	-7.2%
Financial and Insurance Services	-0.3%	-2.0%	-0.3%	-27.0%	-3.7%	1.1%	1.0%	-6.3%	4.0%	1.4%	-10.7%	32.0%	0.2%	-10.0%	-14.0%	80.2%
Health Care and Social Assistance	4.2%	8.0%	5.7%	5.4%	1.7%	2.9%	0.2%	4.4%	5.4%	2.3%	2.3%	7.6%	6.4%	-7.4%	1.9%	7.2%
Information Media and Telecommunications	1.8%	-5.6%	-23.4%	166.1%	-10.5%	25.9%	2.8%	2.2%	2.9%	-35.1%	-2.1%	10.9%	-25.8%	135.9%	-6.9%	-7.6%
Manufacturing	-2.0%	5.0%	-2.6%	5.4%	-3.1%	-1.2%	0.0%	-17.7%	-2.7%	-0.1%	5.4%	-12.6%	-1.1%	3.0%	-1.0%	-1.6%
Mining	3.1%	-11.9%	*	35.2%	*	-27.9%	*	-4.1%	7.7%	-7.3%	-1.8%	-29.3%	-13.2%	7.7%	0.7%	3.2%
Other Services	3.5%	-10.4%	2.0%	7.4%	3.1%	9.7%	1.3%	-3.7%	-0.1%	3.8%	-1.2%	2.6%	0.3%	3.7%	2.9%	-17.0%
Professional, Scientific and Technical Services	3.7%	-0.6%	3.8%	-4.9%	0.7%	5.5%	2.5%	-0.6%	4.8%	1.9%	1.1%	19.5%	3.1%	2.3%	5.4%	14.4%
Public Administration and Safety	2.0%	4.5%	-0.1%	5.7%	0.8%	5.8%	1.2%	7.6%	1.3%	5.7%	3.6%	-6.6%	0.8%	-0.8%	4.8%	6.4%
Rental, Hiring and Real Estate Services	0.1%	-7.5%	6.2%	11.4%	-0.4%	14.4%	5.0%	51.2%	1.1%	2.6%	-0.4%	1.5%	-1.1%	10.5%	-1.2%	-13.2%
Retail Trade	1.1%	1.7%	-1.2%	2.5%	3.1%	-8.2%	-2.1%	17.6%	-0.2%	-1.0%	1.6%	1.9%	-0.1%	-0.5%	4.6%	-10.3%
Transport, Postal and Warehousing	1.4%	5.6%	1.3%	-2.8%	1.5%	9.9%	3.7%	-13.9%	0.8%	4.1%	1.5%	13.8%	1.8%	-1.8%	1.3%	5.4%
Wholesale Trade	1.5%	0.9%	0.3%	8.5%	2.0%	-7.0%	3.4%	0.5%	1.0%	-2.6%	3.5%	-2.2%	0.8%	7.6%	3.1%	2.1%
Total	1.8%	1.9%	1.1%	3.7%	0.9%	2.1%	0.9%	2.5%	2.0%	0.6%	1.5%	0.5%	0.8%	-1.5%	1.3%	3.9%

Source: ABS

Note: "Pre-COVID" is from August 2004 to November 2019; and "Post-COVID" is from November 2019 to August 2024.

* Analysis cannot be performed as the employment count at August 2004 is unavailable

^Growth rates are calculated on a compound basis.