FUTURE OF WORK

Social Research Report
June 2019

Research conducted for Jobs Queensland

ENHANCE research

EXECUTIVE SUMMARY: HIGH-LEVEL INSIGHTS

Enhance Research conducted a social research study into the Future of Work in Queensland on behalf of Jobs Queensland. This study is part of a broader project investigating the changing nature of work and its impact on jobs and skills in Queensland. Insight was sought to provide a robust and Queensland-specific understanding of this complex and evolving area. The social research project involved a two-phase approach covering Employers and Workers.

Phase 1: Qualitative Exploration (Feb – Mar '19)
- 10 x face-to-face focus groups across Queensland with Employers and Workers
- 1 x online community forum with Digital Nomad Workers

Phase 2: Quantitative Validation (Apr – May '19)
- n=2,017 online surveys across Queensland
  - n=502 Employers
  - n=1,515 Workers

The research focused on four (4) key areas identified through literature analysis as likely to shape The Future of Work.

1. Technology Adoption
- Adopting new major technology in recent years is common among Employers surveyed (84%), with communication and efficiency technologies being the most noted.
- Initial challenges in adopting new technologies centre around cost but also hinge on selecting the right technology and integrating these into existing systems. This is particularly true for small and medium Employers.
- Once implemented, training staff in using the new technology is also a challenge. Finding the time, and ensuring all staff are adequately trained to reap the efficiency benefits that are expected are challenges. Training is mainly undertaken inhouse.

2. Working Arrangements: The Experience of Alternative Workers
- One-fifth (18%) of Queensland Workers surveyed are considered Alternative Workers. However, the research found that within this broader category, there is a complicated and diverse range of alternative work arrangements beyond the existing ideas of Gig Economy Workers and Digital Nomad Workers.
- While working in an Alternative arrangement is beneficial to work-life balance in many ways, the unpredictability of work and income, and how these work arrangements are regarded by organisations (e.g. financial institutions for securing loans or insurance) are challenges. Normalisation and acceptance of these arrangements is still evolving.

3. Skills & Training
- Employers and Workers are in agreement that communication skills will be the most important to possess in the next 10 years. Beyond this, other 'soft skills' such as adaptivity and self-management, coupled with specific skills relating to digital, analytical and technical capabilities are considered important.
- A disparity exists amongst Workers and Employers, in views on whether current skills will be sufficient for perceived future changes in industries. Workers mostly feel well equipped and that their current skills will see them through what they regard as minor shifts in requirements. This differs from Employers, who find it difficult to get the right Workers now, and feel their industry will change to a greater degree than what Workers believe.

4. Future Support: A Focus on the Future
- The research suggests that most Employers and Workers are present-focused and are unlikely to look too far into the future and consider how this may look. This is partly driven by a lack of understanding on how the future of work will evolve and what may be required to meet its needs.
- A crucial role for the Queensland Government is seen to exist in providing guidance and information to better direct Workers and Employers on how work will change and evolve.

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INSIGHT SUMMARY

INSIGHT SUMMARY: TECHNOLOGY ADOPTION

The vast majority (84%) of Employers surveyed **have adopted new major technology** in the past three years. Employer size plays a significant role in both the types of new technology adopted, and the drivers behind this adoption.

Communication and efficiency technology are the main types of technology being adopted overall, across all industries and Employer sizes.

The perceived impact of this technology aligns strongly with the key motivations for adoption of increasing efficiency, reducing and saving costs and improving communications.

Additional benefits of adoption are performing tasks to a higher standard, better use of data to inform strategy and new market opportunities.

It was found that less than one in five Employers have reduced Worker's hours due to automation.

One of the key challenges of adopting new technology centres around the cost.

> *"Everyone needs a laptop. Everyone needs a tablet. Everyone needs this software, this license. It all adds up when you've got all these different platforms."* Brisbane, Large Employer

> *"All these new programs come along. You've got to buy them on subscription. In the old days I'd just buy a program, it was mine for years."* Brisbane, Small-Medium Employer

Another key challenge is the need to train staff to use the new technology.

The training across all levels of staff required for the efficient implementation and utilisation of workplace technology was seen as a key frustration and challenge across both Workers and Employers within the qualitative research.

> *"I know that if I spend that, I've got to spend weeks and weeks of my time learning it."* Cairns, Small-Medium Employer

In-house training on new technology and processes is one of the most common types of training that Employers provide to their Workers (61%). In-house training on new technology and processes is also the most common type of training undertaken by Workers in the past three years (32%).

Beyond cost and staff training, the **selection of the right technology for the business and the effective integration of the new technology with existing systems and processes** are also challenges faced within the adoption of any new technology.

> *"Sometimes the systems don't always show a true reflection of how things work. The system might record that the first transactions of the day were at 9:30am, so the boss suggests opening the shop later but the first transaction of the day doesn't mean people weren't in the shop before then."* Bundaberg, Small-Medium Employer

The size of Employers appears to influence the nature of challenges faced in technology adoption.

INSIGHT SUMMARY:
THE EXPERIENCE OF ALTERNATIVE WORKERS

Over three fifths (67%) of Employers surveyed have hired an Alternative Worker within the last three years. Around one fifth (18%) of Queensland Workers surveyed have at least one job that is an alternative working arrangement. The majority of Alternative Workers (68%) surveyed have a single alternative job.

TYPES OF ALTERNATIVE WORKERS
Five sub-categories of Alternative Workers were identified within the quantitative data. These unique sub-categorisations, beyond ‘Gig Economy Workers’, ‘Digital Nomad Workers’, and the large proportion of non-categorised Alternative Workers, reveal that this landscape is more complicated and diverse than previously expected. This presents an additional area for future research studies.

MOTIVATIONS
Key motivators for having an alternative working arrangement **include flexible hours, a greater work-life balance** and more **autonomy** that allows for easier integration of personal needs into one’s day.

“To work freely is the main motivation of why I participate in this type of work.” Digital Nomad Worker

Another key motivator is the **additional income**. The reasons behind this vary, from saving up for a specific financial goal (e.g. a trip to Europe) to paying off the mortgage faster.

“I use the income to pay extra on the mortgage.” Brisbane, Gig Economy Worker

CHALLENGES
The **unpredictable and fluctuating income** is by far the greatest challenge experienced by these Workers.

> *“I work from project to project and rely on contracts with my clients that can be terminated with little notice. That can impact levels of anxiety if a job is not going smoothly and you're not sure if a contract will be renewed and you won't have more work/income in two weeks.”* Digital Nomad Worker

Many Alternative Workers expressed within the qualitative research that the financial unpredictability of their working arrangements lead to anxiety about managing income and expenses.

> *“There are also periods when I don’t have enough work and therefore don’t receive regular pay, making things a bit more stressful financially.”* Digital Nomad Worker

The unpredictable nature of their work can often create further challenges such as accessing loans and insurance, access and acceptance from government services, such as Centrelink and the ATO and even acknowledgement of their skill and experience from traditional Employers.

FUTURE OUTLOOK
Only one-fifth of Alternative Workers (20%) surveyed consider their alternative working arrangement as a long term career.

Within the qualitative research, many Alternative Workers said they struggled to **envisage how long they would continue in their current working arrangement**. The quantitative research supports this, with half of Alternative Workers (52%) surveyed stating they envisage themselves working in their Alternative arrangement for the foreseeable future.

INSIGHT SUMMARY:
THE EXPERIENCE OF REMOTE WORKERS

Six in ten (59%) Employers offer remote working arrangements to their employees. Remote Workers are most likely to be employed by Large Employers, Government departments and Employers in South East Queensland compared to other parts of the State.

Three in ten (31%) Queensland Workers utilise remote working arrangements in some form, with two in five (37%) Remote Workers surveyed regularly working remotely and the remaining three in five (63%) sometimes working remotely.

MOTIVATIONS
The reasons and benefits behind why Employers offer remote working arrangements are well aligned to the reasons why Workers participate in remote working arrangements.

Employers are motivated to offer and hire Remote Workers in order to accommodate family and caring duties, ensure better employee retention and satisfaction, as well as to address Workers not being available in their local area.

Remote Workers choose to work remotely as it allows better work-life balance, a flexible working environment and more flexible hours.

SKILLS AND ATTRIBUTES
Important skills and attributes identified for remote working by Remote Workers are self discipline, good communication skills, self motivation and organisational skills.

CHALLENGES
Remote Working arrangements offer distinct and new challenges for Employers when it comes to managing remote staff in regards to: tracking their productivity, creating a unified team culture, communication challenges and performance management.

Similarly, remote working arrangements also create distinct challenges for Remote Workers, with the most common challenges identified **centring around workplace and team dynamics**. In particular, missing internal conversations, reduced visibility and working longer hours.

Both Employer and Worker challenges suggest that both parties are struggling to adjust to the reality and practicality of remote working arrangements despite the clear and united benefits.

INSIGHT SUMMARY: SKILLS & TRAINING

Around two-thirds of Workers (60%) surveyed have undertaken training or education for their current or future employment in the past 3 years. Just under half (44%) plan to undertake significant work-related training or education in the next three years.

The most common types of training provided by Employers and undertaken by Workers is centred on building skills within current roles, such as in-house training on new technology and processes, paid attendance to conferences and workshops, as well as classes and webinars.

The key barriers to training for both Employers and Workers are financially focused, in regard to the cost and funding of the training as well as finding the time to undertake the training.

MOST IMPORTANT SKILLS
Both Employers and Workers feel that **communication skills will be the most important skills for Workers to have in the next 10 years**. Skills felt to be of secondary importance include 'soft skills' such as adaptivity and self-management. skills, coupled with what are considered hard skills, comprised of digital, analytical and technical skills specific to industry.

Employers and Workers identified that there was a gap in institutions that address these important 'soft skill' requirements, with many considering Vocational Education and Training as a means of filling this gap.

> *"[At university] the focus isn't building emotional intelligence and stuff like that. I think there is a gap"* Brisbane, Large Employer

FUTURE TRAINING EXPECTATIONS
There is a **disparity between Workers' and Employers' expectations in regard to future training.** While two fifths (44%) of Workers expect to undertake significant levels of training in the next three years, just over half of Employers (55%) expect to provide the same levels of training to their employees.

WHO INITIATES THE TRAINING?
Two-fifths of Workers (40%) surveyed initiate their own training, while one-quarter (26%) of the training they undertake is directed solely by their employer.

"They've got so many employees, they're not going to come to me 'Hey, do you want to do this training'. So it's up to me, individually, if I want to learn something new" Brisbane, Standard Worker

This suggests that the **responsibility of training falls on the worker, with the role of the employer being one of financial support**, with almost half of Workers (46%) having their recent training wholly funded by their employer.

If Employers are seen as offerors of financial support for training, and the key challenges for Employers providing training are financial, then addressing the issue of cost for training provides an opportunity for action.

INSIGHT SUMMARY: FOCUS ON THE FUTURE

FUTURE SKILL EXPECTATIONS

There is a **disparity among Workers' and Employers' expectations in regard to future skill changes** in the next 10 years. While Workers think the skills required in their profession will only change slightly to moderately, Employers believe the skills required will change moderately to a lot.

WORKERS' MINDSET

Workers generally appear to have an immediate needs-based mindset when it comes to developing and up-skilling themselves for work. Their main motivators for training centre around, remaining current, gaining skills for their current role, and meeting compliance requirements. These motivators suggest that **Workers have a mentality of maintaining their skills rather than looking ahead at what skills they may require in the future.**

"10 years ago is so far away! I honestly don't picture that far in advance." Digital Nomad Worker

EMPLOYERS' MINDSET

The majority (59%) of Employers feel largely well prepared for the future and where their industry is heading.

However, half (56%) of Employers currently find it challenging finding the right employees with the right skills and have similar levels of confidence in this area for the future.

In addition, more than six in ten (66%) Employers expect that skills will change moderately to a lot in the next 10 years.

These discrepancies in Employers' future perceptions between expectations highlight a disconnect of Employers' current experiences and future outlook.

GUIDANCE IS NEEDED

While individuals and Employers are considered to share the responsibility for ensuring future skills. The discrepancies between these groups and lack of foresight suggests that they are not well placed to provide overall direction and guidance on what the future of work will entail. **There is a need for a third party who can keep an eye on the big picture and the future.**

"I'd love to be able to go to a career counsellor for adults, to help guide me on what's available and the steps needed to get there." Brisbane, Large Employer

"Because we don't know what skills or employment is going to be available" Brisbane, Standard Worker

The crucial role of providing guidance to Employers and Workers on what the future of work will entail is where the Queensland Government can be of the greatest support.

PROJECT OVERVIEW AND APPROACH

PROJECT OVERVIEW

This Future of Work social research project falls within the context of the broader Future of Work project conducted by Jobs Queensland into the changing nature of work and its impact on jobs and skills in Queensland.

As such, this social research has been designed to further explore what Employers and Workers perceive the future of work will look like, how they are planning for it and if it is impacting the nature of business.

Another focus for this project is with the recently seen changes in both working arrangements (rise in short “Gig Economy” work) and locations (increases in the different ways of working enabled by digital technology e.g. remote working and Digital Nomad Workers).

OVERALL OBJECTIVE

The objective of this social research project is to obtain empirical data in relation to the future/changing nature of work and skills for both Employers and Workers in Queensland, with a particular focus on the occurrence and frequency of engagement with alternate work arrangements (e.g. platform-based ‘gig’ employment arrangements; self-employment; contract).

The categorisation of ‘Alternative Work’ used in this Social Research project differs slightly from that used by Jobs Queensland in their Future of Work project.

DETAILED SOCIAL RESEARCH OBJECTIVES

RESEARCH PRIMARY AREAS OF FOCUS

- The adoption/uptake (or lack thereof) of any new major technology by Employers (both recent and planned) and the reason for such actions (technology may include both hardware and software).
- The extent of work facilitated by digital platforms (i.e. 'gig' and ‘task-based’ economies) in Queensland and the extent of access to, and reasons for, participation in platform-mediated work arrangements.
- The extent of self-employment and any emerging changes within it, including the phenomena of Digital Nomad Workers and Entrepreneurs in Queensland.
- The emergence and extent of remote work teams, and other non-standard working arrangements in Queensland.
- Reasons/rationale/motivations/incentives behind these developments.
- The extent to which Employers and Workers have prepared/are preparing for these developments.

RESEARCH SECONDARY AREAS OF FOCUS

- The degree to which definitions (or lack of clarity around such) have and are impacting measurement and understanding of the impacts and outcomes of research on the future of work.
- Employers’ understanding of the meaning of “leadership and management” in relation to changing work processes and business models.
- The nature of new major technology adopted by Employers (e.g. labour substituting, saving, augmenting).
- The extent to which the content of jobs, and the skills manifested within those jobs have changed over the past five years as a result of the adoption of new technologies and the extent to which jobs and the tasks within them are expected to change over the next five to 10 years.
- How these developments will affect the future skill needs of Workers, Employers, and industry in Queensland.
- The extent and type of training undertaken by Workers in the last five to 10 years; the likelihood of undertaking further training; Employers’ engagement in the provision of training.
- The role and capacity of the Vocational Education and Training (VET) sector in meeting future training and skill needs.
- The opportunities for Queensland and what/where we are uniquely placed to take advantage.
- The role of institutions (government, Vocational Education and Training, etc.) in the process of transition.

OVERVIEW OF THE RESEARCH APPROACH

In order to achieve the depth and breadth of insight required for this social research project, a two phase research approach was implemented.

The first phase was **qualitative** in nature and was designed to **explore** the current understanding of Employers' and Workers' beliefs, behaviour and outlook toward the future of work.

The second phase was **quantitative** in nature and was designed to **measure** our understanding of the target audience.

RESEARCH APPROACH OVERVIEW			
PLANNING & ESTABLISHMENT	PHASE 1: QUALITATIVE EXPLORATION	PHASE 2: QUANTITATIVE VALIDATION	ANALYSIS & REPORTING

TARGET AUDIENCES

TARGET EMPLOYER AUDIENCE

- Employers with some presence/Workers in Queensland
- A mix of Employer types including various employee sizes, revenues and locations across the state
- Seeking to speak to owner/CEO/HR Manager or Senior Decision Maker regarding business workforce strategy and changes

TARGET WORKER AUDIENCE

- Workers located in Queensland
- A mix of industry, skills and locations across the state
- A range of different working arrangements (e.g. part-time, casual, self-employed, contract, task-based, Gig Economy Workers), as well as Workers where their work is enabled by technology (Digital Nomad Workers and Remote Workers are also represented)

QUALITATIVE OVERVIEW + SAMPLE

The qualitative stage of this social research project was designed to identify the key topics of concern and relevance amongst the two target audiences; Employers and Workers and their sub-groups.

Ten focus groups and an online community were conducted with Employers and Workers from the 18th of February to the 19th of March 2019.

EMPLOYER SAMPLE:
Aligning with ABS definitions of small, medium and large business, the Employer focus groups were split based on employee size. It was anticipated that knowledge and understanding of changes to the future of work, as well as adoption of new technologies, are different between these groups.

FOCUS GROUP OVERVIEW

36

EMPLOYERS
5 focus groups

Large Qld Employers
(2 focus groups with Employers from Employers sized 200+ employees)

Small – Medium Queensland Employers
(3* focus groups were conducted with Employers
**As Small/Medium employer make up more than 97% of Employers an additional group was included for this audience*.

Employers were selected to ensure they met specific criteria and represented a range based on a:

- Mix of industries
- Mix of management levels (Owner, CEO, HR Management, Senior Decision Makers)
- Employers must have an office in Queensland
- Consideration to use 'Alternative Workers'
- Mix of ages and genders

WORKERS SAMPLE:
Based on the different working arrangements of interest to this research project, a total of six focus groups were conducted with Workers comprising the different working arrangements of interest.

FOCUS GROUP OVERVIEW

50

WORKERS
5 focus groups + 1 online community

Three types of Workers were focused on:

Standard Permanent Workers
(2 focus groups in total one conducted in Brisbane and the other in Cairns)

Gig Economy Workers
(3 focus groups in total, two conducted in Brisbane and the third conducted on the Gold Coast)

Digital Nomad Workers
(1 online community with 10 Digital Nomad Workers was conducted)

An online community was run for Digital Nomad Workers due to their travelling and nomadic nature.

Workers were selected to ensure they met specific criteria and represented a range of differences that were based on:

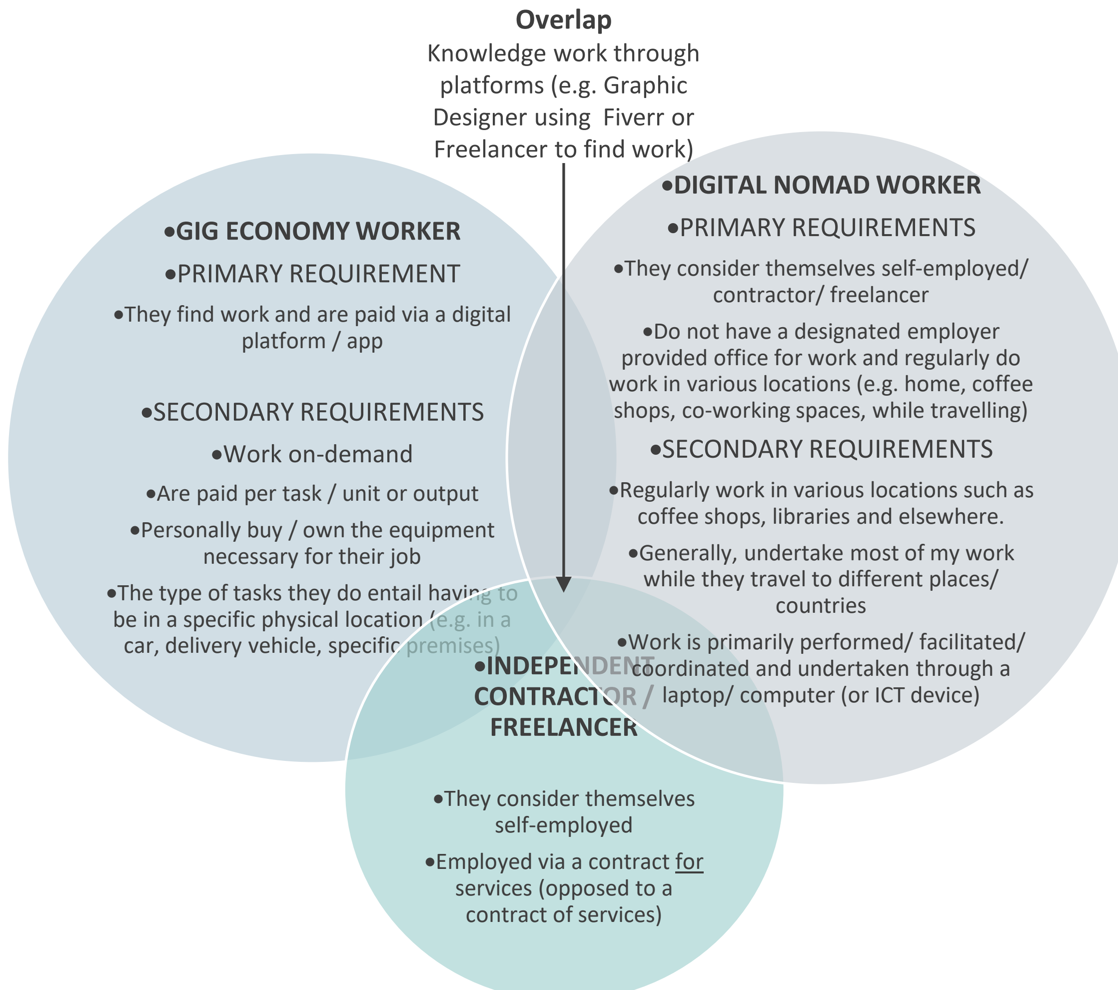
- Matching specific Worker group criteria
- Mixture of small, medium and large Employers
- Mixture of industries & employment types
- Mixture of age and gender
- Residents of Queensland.

DEFINING GIG ECONOMY WORKERS & DIGITAL NOMAD WORKERS

The following characteristics developed from the Future of Work literature review and discussion paper were utilised throughout the this research project in defining and Gig Economy Workers and Digital Nomad Workers.

From the outset an overlap of these defining characteristics was identified amongst those fitting into the Gig Economy, Digital Nomad Workers, and Independent Contractors/ Freelancers. *E.g. An independent graphic designer who doesn't have a designated workspace and sources work and receives payment via an online platform such as Fiverr.*

As a result of the overlap in Gig Economy Workers and Digital Nomad Workers, characteristics were split into primary and secondary requirements to assist in the identification of these worker types for the qualitative research.
To qualify as someone working in the Gig Economy or as a Digital Nomad within the qualitative research, participants must have identified with the primary requirement/s, as well as two of the secondary requirements.



QUANTITATIVE OVERVIEW + SAMPLE

The **quantitative measurement** stage of this social research project was informed by the earlier qualitative research. It was then designed to quantify the qualitative insights by measuring the behaviour, perceptions and attitudes of both Queensland Employers and Workers in regard to the Future of Work.

Two online surveys were conducted, one with Queensland Employers and the other with Queensland Workers.

METHOD:

2x 15min
ONLINE SURVEY

DATA COLLECTION
15 April – 6 May 2019

2,017 **TOTAL PARTICIPANTS**

502

EMPLOYERS
The Employer sample was sourced from Research Profile's dedicated business-to-business online panel. No quotas were set, however a representative mix of organisational size, decision making responsibilities, management levels, industries, ages, genders and regions were obtained.

1,515

WORKERS
The Worker sample was sourced from Dynata (formerly Research Now / SSI) online panel. Again no quotas were set, however a representative mix of employment types (full time/part time/contract/Gig etc.), industries, employment roles, employment types (Remote, Alternative etc.) ages, genders and regions were obtained.

OVERVIEW OF THE QUESTIONNAIRES
In order to capture both the Employer and Worker perspectives of the research objectives, two online questionnaires were developed.

Employers were requested to complete the online questionnaire as a representative of their business, while Workers were asked to complete the questionnaire based on their personal experiences.

While each questionnaire differed slightly, both followed a similar structure by covering the following topic areas:

- **Technology Adoption**
- **Working Arrangements**
    - Remote Workers
    - Alternative Workers
- **Skills & Training**
- **Future Support**

QUANTITATIVE: EMPLOYER SAMPLE

SOLE TRADER	SMALL EMPLOYER	MEDIUM EMPLOYER	LARGE EMPLOYER
28%	29%	18%	25%

DECISION MAKING RESPONSIBILITIES

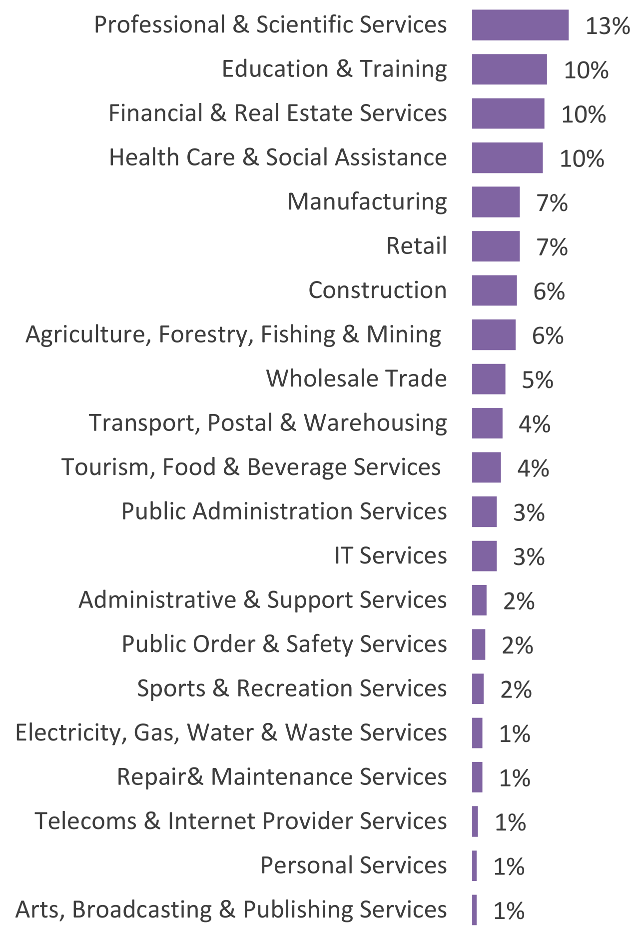
HIRING/ RECRUITING	BUSINESS DEVELOPMENT
100%	65%

MANAGEMENT LEVELS

UPPER MGMT	MIDDLE MGMT	LOWER MGMT
43%	36%	21%

SEQ	ROQ	INTERSTATE
78%	19%	2%

INDUSTRY



QUANTITATIVE: WORKER SAMPLE

STANDARD WORKER	REMOTE WORKER	ALTERNATIVE WORKER	SEQ	ROQ
51%	31%	18%	78%	22%

FULL TIME	PART TIME	CASUAL	ON-DEMAND / AD HOC
58%	26%	12%	5%

GENDER

41% | 59%

AGE

Under 25	25 to 34	35 to 44	45 to 54	55 to 64	65+
6%	16%	23%	23%	23%	9%

ALTERNATIVE WORKERS SUB-CATEGORISATION*

GIG ECONOMY APP WORKER	DIGITAL NOMAD WORKER	STATIONARY NON-DIGITAL WORKER	STATIONARY DIGITAL WORKER	ROAMERS	NON-CATEGORISED WORKERS
15%	3%	12%	19%	21%	30%

INDUSTRY

Health Care & Social Assistance	13%
Education & Training	12%
Retail	10%
Administrative & Support Services	7%
Professional & Scientific Services	7%
Public Administration Services	6%
Transport, Postal & Warehousing	6%
Financial & Real Estate Services	6%
Tourism, Food & Beverage Services	6%
Construction	5%
Manufacturing	3%
Agriculture, Forestry, Fishing & Mining	3%
Public Order & Safety Services	3%
Wholesale Trade	2%
IT Services	2%
Arts, Broadcasting & Publishing Services	2%
Repair & Maintenance Services	1%
Sports & Recreation Services	1%
Electricity, Gas, Water & Waste Services	1%
Personal Services	1%
Telecoms & Internet Provider Services	1%

** See Page 87 for definitions of Alternative Workers sub-categorisations*

CATEGORISING ALTERNATIVE & STANDARD WORKERS

Within the Workers survey, respondents were categorised as either standard Workers or Alternative Workers. For the purposes of this social research project, the following factors were used to define each group.

ALTERNATIVE WORKERS	STANDARD WORKERS
Do **not** work for the same employer year-round Do **not** have a salary *All self-employed respondents were classed as Alternative Workers due to the fact that self-employment is a key feature of our Gig Economy Worker and Digital Nomad Worker definitions	Work for the same employer year-round and/or Are on a salary

REPORT INTERPRETATION

REPORT INTERPRETATION

This report is an full interpretive report encompassing both qualitative (phase 1) and quantitative (phase 2) findings of the Future of Work Social Research Project.

While this report focuses predominantly on the quantitative results (phase 2), qualitative insights have been utilised throughout to give context and insight where required.

Due to the extent of data collected, an approach of reporting exceptions rather than confirming already known beliefs and behaviour has been taken. This reporting approach ensures that key insights are not lost within the volume of data.

This report follows the delivery of a qualitative research debrief as well as the delivery of a quantitative result topline to Jobs Queensland. This topline contains all the results in excel format, making all information readily accessible if it is not explicitly mentioned in the report.

REPORTING STRUCTURE

Due to the similar structure of the questionnaires, the findings of both Employer and Worker questionnaires have been compiled into a single report.

Having the findings for both Employers and Workers within one report is not designed to directly compare results, rather to explore the perspectives of each group with the aim of identifying differences.

GENERAL INTERPRETATION

Please note the following when interpreting this report.

- **The results presented are based on robust sample sizes of Employers and Workers in Queensland. The results are a reflection of the experiences and perceptions expressed by participants participating in the qualitative phase, and surveyed in the quantitative phase.**
- Where questions do not sum to 100%, this is due either to rounding or multiple responses.
- In some cases, results <5% have been excluded from charts to assist in emphasising the important information.
- Please be cautious in interpreting data with base sizes of n<=30.
- The base note included in the bottom left corner of each slide represents the sample size (the number of participants who have answered the relevant question) as well as the question/s asked.
- For respondents who have multiple jobs, their answers are based upon their **primary job** in which they work the most hours.
- For respondents classified as Alternative Workers with multiple jobs, their answers to questions about their alternative job are based upon their **primary alternative job** in which they work the most hours.
- For the purpose of this report the following job roles have been combined into one segment titled ‘Blue Collar Workers’:
    - Technician or tradesperson
    - Machinery operator or driver
    - Labourer

REPORT INTERPRETATION CONT'D

SIGNIFICANT DIFFERENCES
A statistically significant difference is where the difference is large enough that it is a "real" difference and not just a by-product of the margin of error associated with the sample size of surveys completed.

In this report, data is shown at a combined overall level, with key statistically significant differences between groups shown where applicable and meaningful.

Please note that two different types of significance testing have been used.

For differences between 2 or 3 segments (e.g. employer size), column comparisons have been used to show which groups are significantly different relative to other groups (e.g. Compared to large Employers, small Employers are more likely to have less resources).

Significant differences, where they occur, have been outlined on the relevant charts and are indicated as shown below:

Figures in GREEN are significantly greater than figures in RED

Where significant differences occur between three segments the differences have been outlined on the relevant charts and are indicated as shown below:

GREEN, ORANGE and RED figures are significantly different from each other

For differences between four or more segments (e.g. industries), figures from each segment have been compared to the net, in order to determine significant differences. This means that certain segments will be significantly higher or lower than the overall score (e.g. Workers in the Retail industry are the least likely to have a home office. Workers in the Professional & Scientific Services industry are the most likely to have a home office).

Significant differences, where they occur, have been outlined using directional arrows and are indicated as shown below:

Figures are significantly higher ↑ or lower ↓ than the average

REPORT INTERPRETATION CONT'D

HOW RANK QUESTIONS ARE CALCULATED

	Self-motivation	258
Total		**798**
Rank Score	Self-motivation	32

1. Weighted scores are calculated by reversing Respondents' scores:

Respondents' Score		Weighted Score Equivalent
Most Important - 1	=	3
2nd most important - 2	=	2
3rd most important - 3	=	1

2. Sum of weighted scores for each option

3. The number of respondents, multiplied by the Perfect Score.

   E.g. $266 \times 3 = \mathbf{798}$

4. The Rank Score is calculated by: $(2) \div (3)$

   E.g. $258 \div 798 = 32\%$ x 100

HOW MEAN SCORES ARE CALCULATED

1. Mean rating scores are calculated by first excluding any respondents where 'don't know' was their response rather than a specific rating

2. Ratings are summed together using the weighted data

3. The mean rating is calculated by the:

   sum of ratings ÷ number of respondents

TECHNOLOGY ADOPTION

TECHNOLOGY ADOPTION
Summary of Findings

ADOPTION OF NEW TECHNOLOGY
The vast majority (84%) of Employers surveyed with offices in Queensland have adopted new major technology in the past 3 years.

Communication and efficiency technology are the main types of technology being adopted overall, across all industries.

Reflecting this, the key organisational impacts of adopting new technology are easier and more effective communication and more efficient performance of tasks.

THE MOTIVATIONS & CHALLENGES OF TECHNOLOGY ADOPTION
The primary drivers for adopting new technologies are increasing efficiency, reducing costs, improving communication and staying up to date.

The **key challenges of adopting new technology centre around the cost, the need to train staff to use the new technology,** and integrating the new technology with existing technology and processes.

Employer size plays a significant role in both the types of new technology adopted, and the drivers behind this adoption.

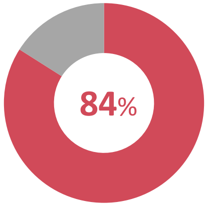
SPECIFIC INTERPRETATION FOR THIS SECTION
Please note the following when interpreting the Technology Adoption section of the report:

- This section was asked to Employers and Sole Traders
- Sole Traders are defined as individuals who are a sole business operator or are part of a partnership/cooperative.
- In this section of the report Sole Traders' responses were combined with Employer responses to give a wholistic understanding of technology adoption amongst all business sizes.
- Workers were not asked questions about the technology adopted within their Employer's business.

TECHNOLOGY ADOPTED

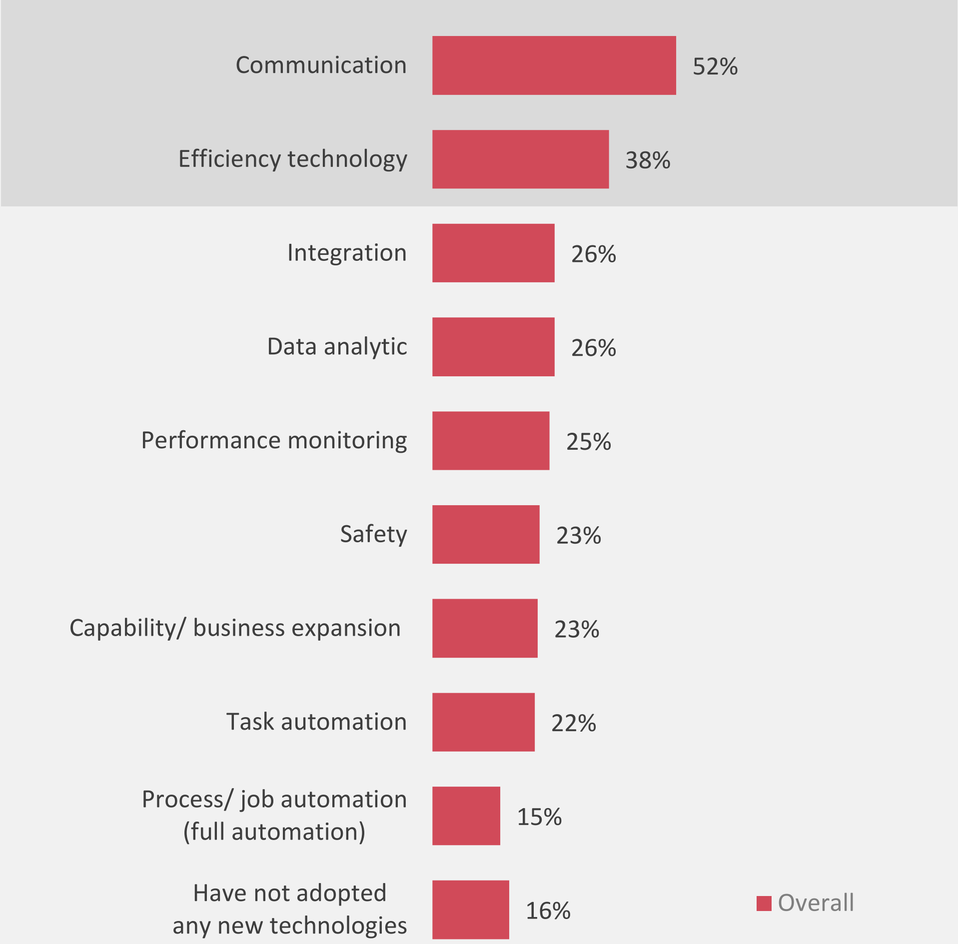
In the past 3 years, most Employers surveyed have adopted new technology, with communication and efficiency technology being the main types introduced.

- Communication technology is defined as when technology is utilised to make communicating or knowledge sharing easier, more efficient and more effective.
- Efficiency technology is defined as when technology saves time, reduces costs, reduces the effort involved in completing a task or process.
- Further definitions on technology types can be found in the appendix.



have adopted new technologies in past 3 years

MAJOR TECHNOLOGIES ADOPTED IN PAST 3 YEARS



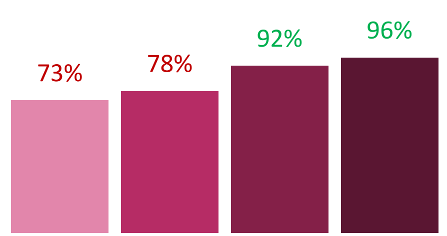
Base: All Employers and Sole Traders (n=746)
T1. What types of new major technologies have been adopted within your organisation in the past 3 years?

TECHNOLOGY ADOPTED

BY EMPLOYER SIZE

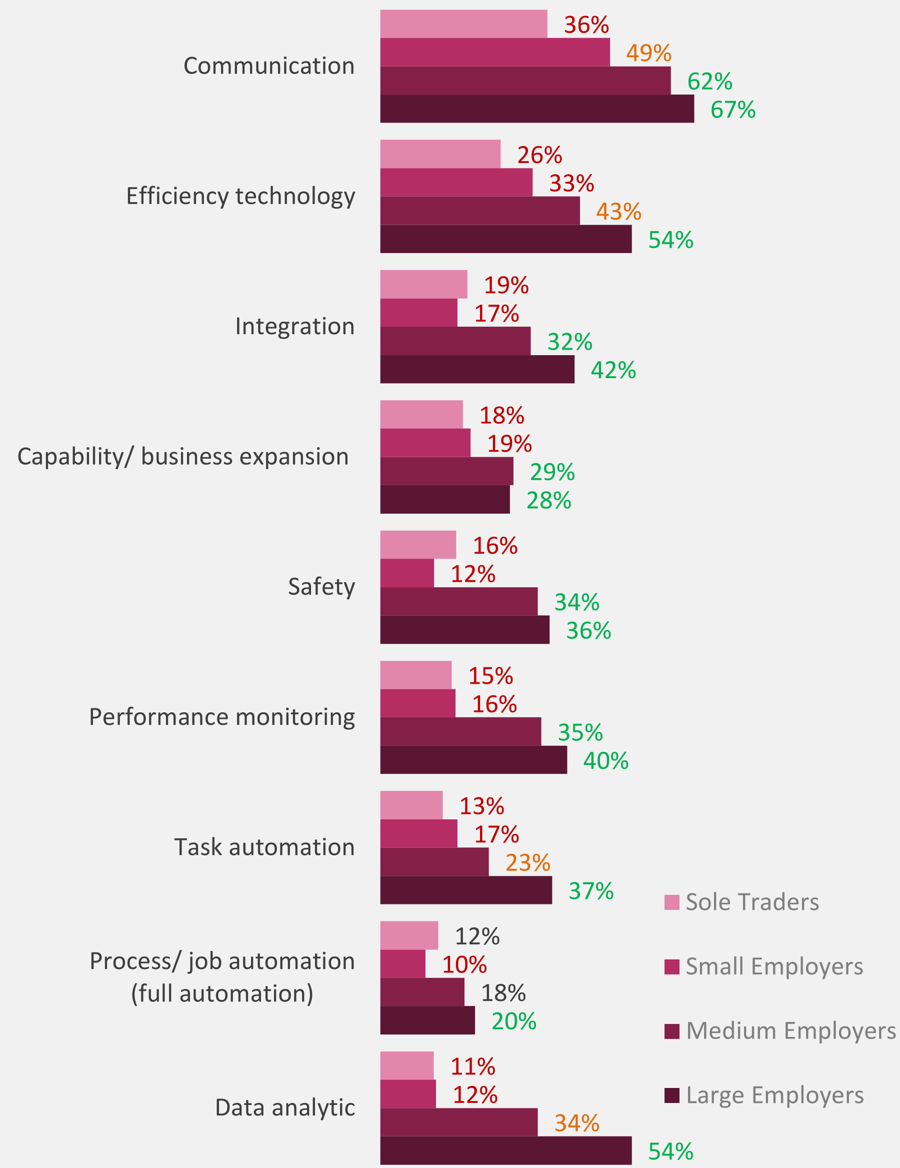
Large Employers surveyed are significantly more likely to have adopted major technologies in the past 3 years compared to smaller sized Employers. Communication, efficiency, task automation and data analytic technologies in particular are all adopted significantly more by large Employers.

ADOPTED NEW TECH IN LAST 3 YEARS



Base: All Employers and Sole Traders (Sole Traders n= 209, Small Employer n=217, Medium Employer n=133, Large Employer n=187)
T1. What types of new major technologies have been adopted within your organisation in the past 3 years?

MAJOR TECHNOLOGIES ADOPTED IN PAST 3 YEARS



GREEN, ORANGE and RED figures are significantly different from each other

TECHNOLOGY ADOPTED

BY INDUSTRY

Communication technology is the main type of technology adopted across industries in the past 3 years. The Manufacturing, and combined Agriculture, Forestry, Fishing & Mining industries are the most likely to have adopted safety technology.

	Health Care & Social Assistance	Education & Training	Financial Services & Real Estate	Professional & Scientific Services	Retail	Construction	Manufacturing	Agriculture, Forestry, Fishing & Mining
	n=68	n=67	n=63	n=88	n=63	n=45	n=40	n=34
Communication	53%	61%	59%	52%	46%	47%	63%	71%
Efficiency	40%	39%	41%	47%	43%	31%	38%	47%
Integration	26%	25%	30%	28%	29%	22%	23%	41%
Data analytic	37%	36%	30%	22%	29%	7% ↓	33%	26%
Performance monitoring	29%	21%	22%	22%	33%	29%	20%	32%
Safety	16%	27%	10% ↓	16%	24%	36%	43% ↑	56% ↑
Capability/ business expansion	19%	18%	24%	24%	25%	20%	20%	21%
Task automation	19%	22%	33%	23%	24%	13%	33%	32%
Process / job automation (full automation)	12%	16%	14%	19%	13%	11%	18%	18%

Top % in each segment are shaded

Figures are significantly higher ↑ or lower ↓ than the average

Base: All Employers and Sole Traders

T1. What types of new major technologies have been adopted within your organisation in the past 3 years?

REASONS FOR ADOPTION

Employers surveyed adopt new technology primarily to increase efficiency, reduce costs, improve communication and to stay up to date.

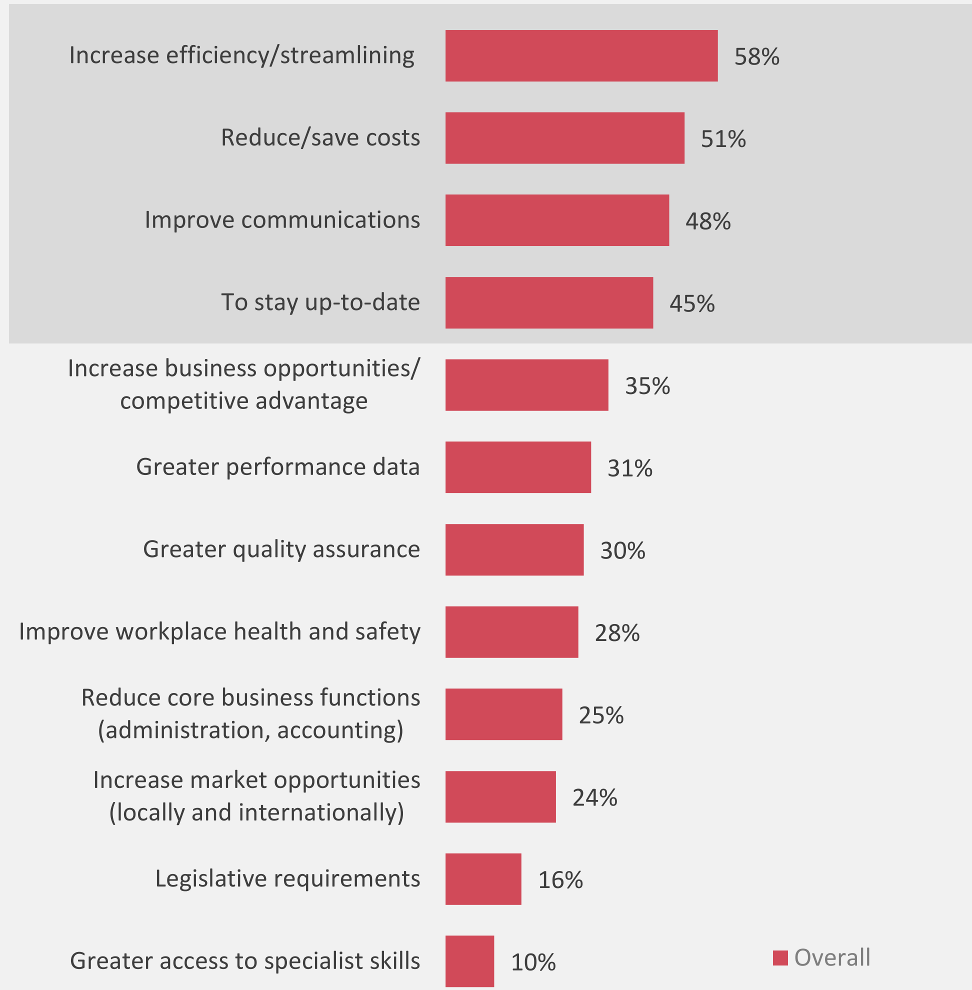
Within the qualitative research, Employers identified communication technology, such as smart devices and video conferencing software, as well as efficiency technologies leading to easier, faster and more meaningful communications and practises within their businesses.

“Yeah, we're doing online communication now. We have a lot of meetings that are video conference meetings with people working remotely, or in satellite offices” Brisbane, Small-Medium Employer

“Yeah. I've found with our POS system it's far easier to do your stock take because it automatically does it everything for you. It even notifies you when you need to order something”
Bundaberg, Small-Medium Employer

“Technology certainly for me and my team's perspective, allows us to be equally as productive or more productive for less effort”
Brisbane, Large Employer

REASON FOR ADOPTING NEW TECHNOLOGIES



Base: Employers and Sole Traders who have adopted new technologies (n=583)
T2. What are the reasons for your organisation adopting these new technologies?

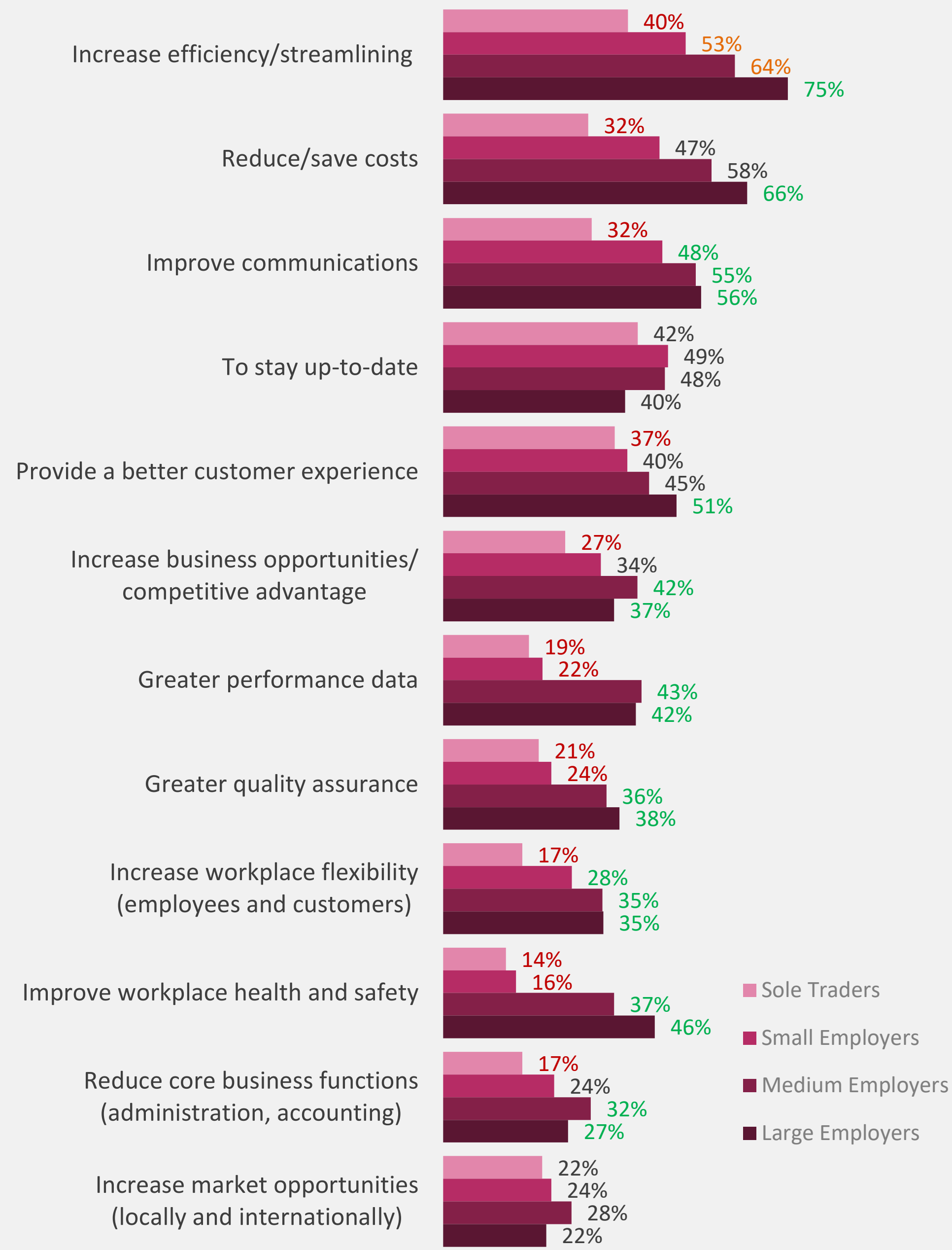
REASON FOR ADOPTION

BY EMPLOYER SIZE

Large Employers surveyed are significantly more likely to have adopted new technologies to increase business opportunities, have greater quality assurance and performance data and improve workplace health and safety.

> *"We can draw data from those systems much more effectively. I mean, there's a much greater interest in being able to evaluate, assess outcomes from what we're doing rather than just trusting what we're doing is right"* Brisbane, Large Employer
>
> *"We've had a lot of safety improvements from technology. Automation of bots or drones has been a massive one for us. Instead of having a physical person to have a climb a tower and have to check something or carry something out, we use drones a lot for that now and do you a lot more so you have the efficiency gain to it"* Brisbane, Large Employer

REASON FOR ADOPTING NEW TECHNOLOGIES



GREEN, ORANGE and RED figures are significantly different from each other

Base: Employers and Sole Traders who have adopted new technologies (Sole Traders n=139, Small Employer n=157, Medium Employer n=118, Large Employer n=169)
T2. What are the reasons for adopting these new technologies?

REASON FOR ADOPTION

BY INDUSTRY

Reasons for adopting new technologies are similar across most industries, with increasing efficiency, saving costs and improving communication being the main drivers. The Manufacturing and combined Agriculture, Forestry, Fishing & Mining industries are the most likely to have adopted new technology to improve workplace health and safety.

	Health Care & Social Assistance	Education & Training	Financial Services & Real Estate	Professional & Scientific Services	Retail	Construction	Manufacturing	Agriculture, Forestry, Fishing & Mining
	n=51	n=57	n=52	n=70	n=48	n=33	n=31	n=30
Increase efficiency / streamlining	57%	61%	67%	66%	48%	61%	58%	73%
Save costs	47%	40%	42%	57%	50%	42%	71%	73%
Improve communications	61%	44%	46%	59%	40%	36%	48%	53%
To stay up-to-date	43%	46%	42%	40%	56%	33%	35%	37%
Better experience	51%	33%	46%	36%	54%	33%	45%	27%
Increase opportunities /competitive advantage	27%	26%	44%	40%	38%	30%	45%	33%
Greater performance data	41%	39%	25%	26%	33%	18%	32%	30%
Greater quality assurance	41%	33%	25%	33%	23%	27%	26%	37%
Improve workplace health and safety	41%	25%	10% ↓	10% ↓	31%	42%	55% ↑	57% ↑

Top 3% in each segment are shaded

Figures are significantly higher ↑ or lower ↓ than the average

Base: Employers and Sole Traders who have adopted new technologies
T2. What are the reasons for your organisation adopting these new technologies?

CHALLENGES WITH ADOPTION

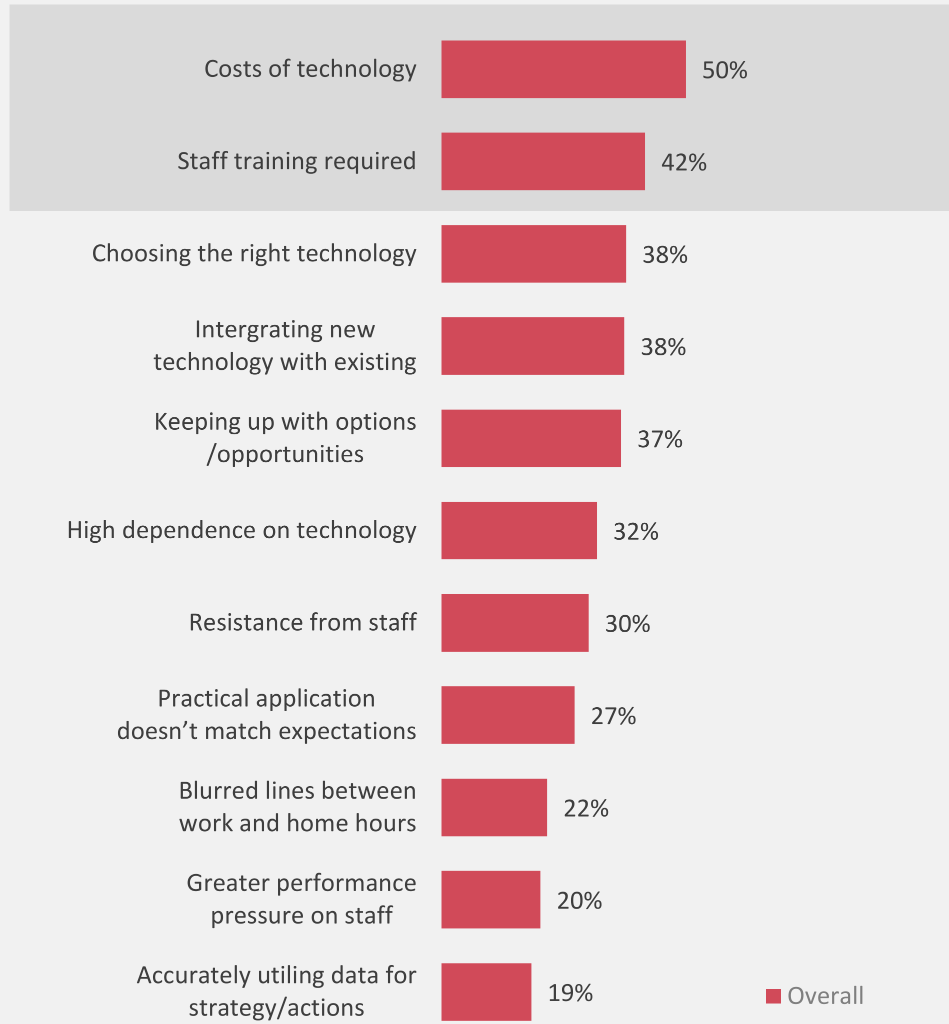
Costs and required staff training are the primary challenges that the Employers surveyed face when adopting new technologies. Choosing the right technology, and integrating with existing technology are also challenges.

The cost of new technology was a common concern also expressed within the qualitative research.

> *“Cost. Everyone needs a laptop. Everyone needs this software, this license. It all adds up when you've got all these different platforms”*
> Brisbane Large Employer
>
> *“All these new programs come along. You've got to buy them on subscription. In the old days I'd just buy a program, it was mine for years”*
> Brisbane, Small-Medium Employer

Base: Employers and Sole Traders who have adopted new technologies (n=583)
T3. What are some of the challenges for your organisation when adopting these new technologies?

CHALLENGES WITH ADOPTING NEW TECHNOLOGIES



CHALLENGES WITH ADOPTION CONT'D

Within the qualitative research, the **training across all levels of staff required** for the efficient implementation and utilisation of workplace technology was seen as a key challenge across both Workers and Employers surveyed. The key barrier to this training was finding the time to train within already busy days.

"But I know that if I spend that, I've got to spend weeks and weeks of my time learning it, trying to implement it. Will it work? Will it not work? It's a big risk"
Cairns, Small-Medium Employer

"I would add onto that training and then retraining because this week we're told the process is like this, oh hang on a minute no, the thing's had an upgrade so now what you learnt last week doesn't work anymore so now you've got to learn" Bundaberg, Small-Medium Employer

"I'm always worried. It might give me an efficiency down the track, but how much time is it now going to take me. Is it going to be such a headache"
Cairns Small-Medium Employer

Building upon the challenges of staff training for new technology, another challenge identified within the qualitative research was **effectively integrating the technology within the business**.

"Sometimes the systems don't always show a true reflection of how things work. The system might record that the first transactions of the day were at 9:30am, so the boss suggests opening the shop later but the first transaction of the day doesn't mean people weren't in the shop before then" Bundaberg, Small-Medium Employer

"[Technology freeing up time] If it's implemented well, yes" Brisbane, Large Employer

CHALLENGES WITH ADOPTION

BY EMPLOYER SIZE

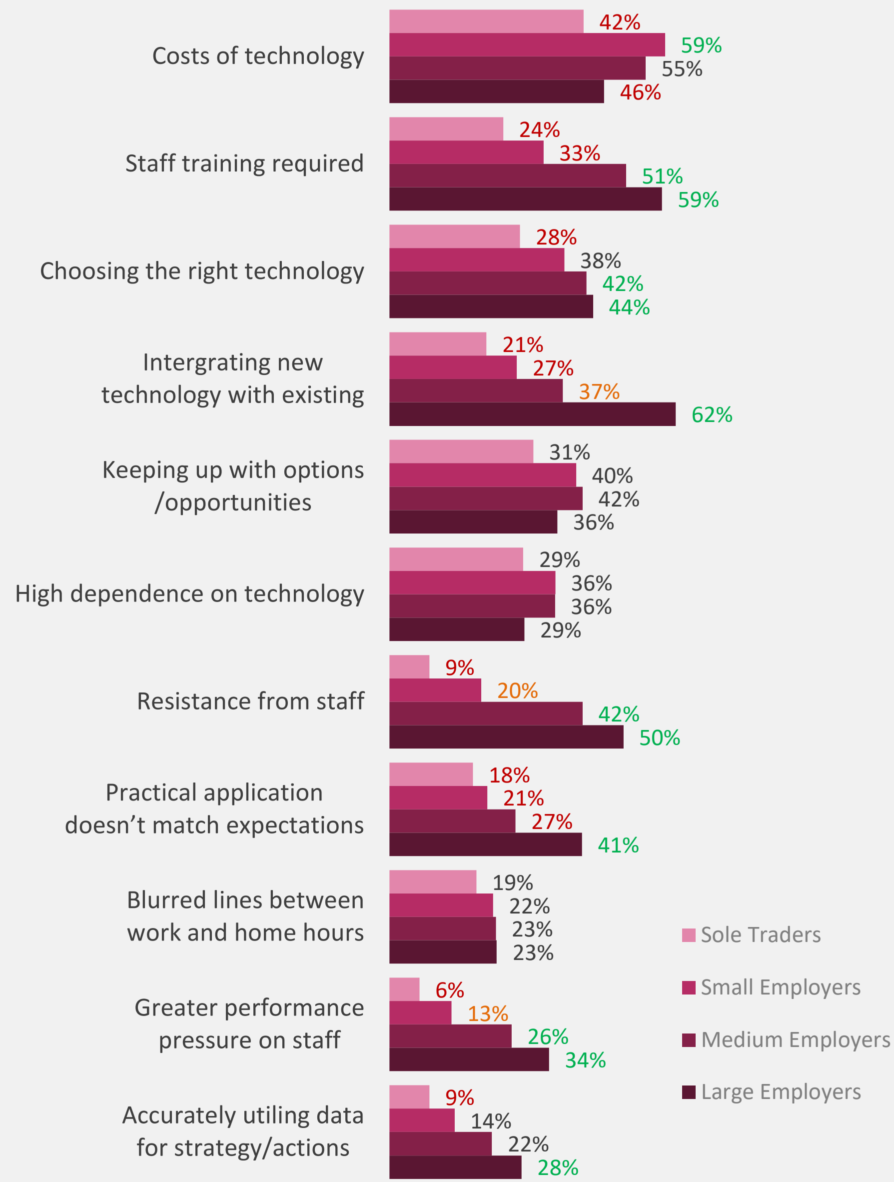
The cost of technology is more likely to be a challenge for small Employers.

> *"But they don't tell you is how much more it's going to cost. And as you become more efficient, the bottom line doesn't necessarily increase. Because the technology takes it all [the profits]"*
> Cairns, Small-Medium Employer

Resistance from staff, training and the greater performance pressure on staff, are significantly more likely to be challenges faced by larger Employers than smaller ones.

For large Employers, the integration of new technology with existing technologies is an issue that is more pronounced due to their size.

CHALLENGES WITH ADOPTING NEW TECHNOLOGIES



Base: Employers and Sole Traders who have adopted new technologies (Sole Traders n=139, Small Employer n=157, Medium Employer n=118, Large Employer n=169)
T3. What are some of the challenges for your organisation when adopting these new technologies?

GREEN, ORANGE and RED figures are significantly different from each other

CHALLENGES WITH ADOPTION

BY INDUSTRY

The challenges faced when adopting new technologies are similar across most industries, with the costs of technology, staff training and integrating new technology with existing technology being common issues.

	Health Care & Social Assistance	Education & Training	Financial Services & Real Estate	Professional & Scientific Services	Retail	Construction	Manufacturing	Agriculture, Forestry, Fishing & Mining
	n=51	n=57	n=52	n=70	n=48	n=33	n=31	n=30
Costs of technology	43%	54%	**54%**	44%	**50%**	**58%**	**55%**	43%
Staff training required for new technology	**57%**	**58%**	37%	34%	40%	42%	45%	40%
Choosing the right technology	31%	37%	35%	**47%**	27%	39%	32%	33%
Integrating new technology with existing	45%	46%	40%	31%	31%	**55%**	42%	**57%**
Keeping up with options/opportunities	37%	42%	35%	36%	33%	30%	42%	43%
High dependence on technology	37%	26%	35%	39%	21%	21%	32%	37%
Resistance from staff	45%	32%	19%	21%	29%	30%	32%	40%
Application doesn't match expectations	37%	26%	25%	33%	17%	24%	29%	43%

Top 3% in each segment are shaded

Figures are significantly higher ↑ or lower ↓ than the average

Base: Employers and Sole Traders who have adopted new technologies

T3. What are some of the challenges for your organisation when adopting these new technologies?

IMPACT OF ADOPTION

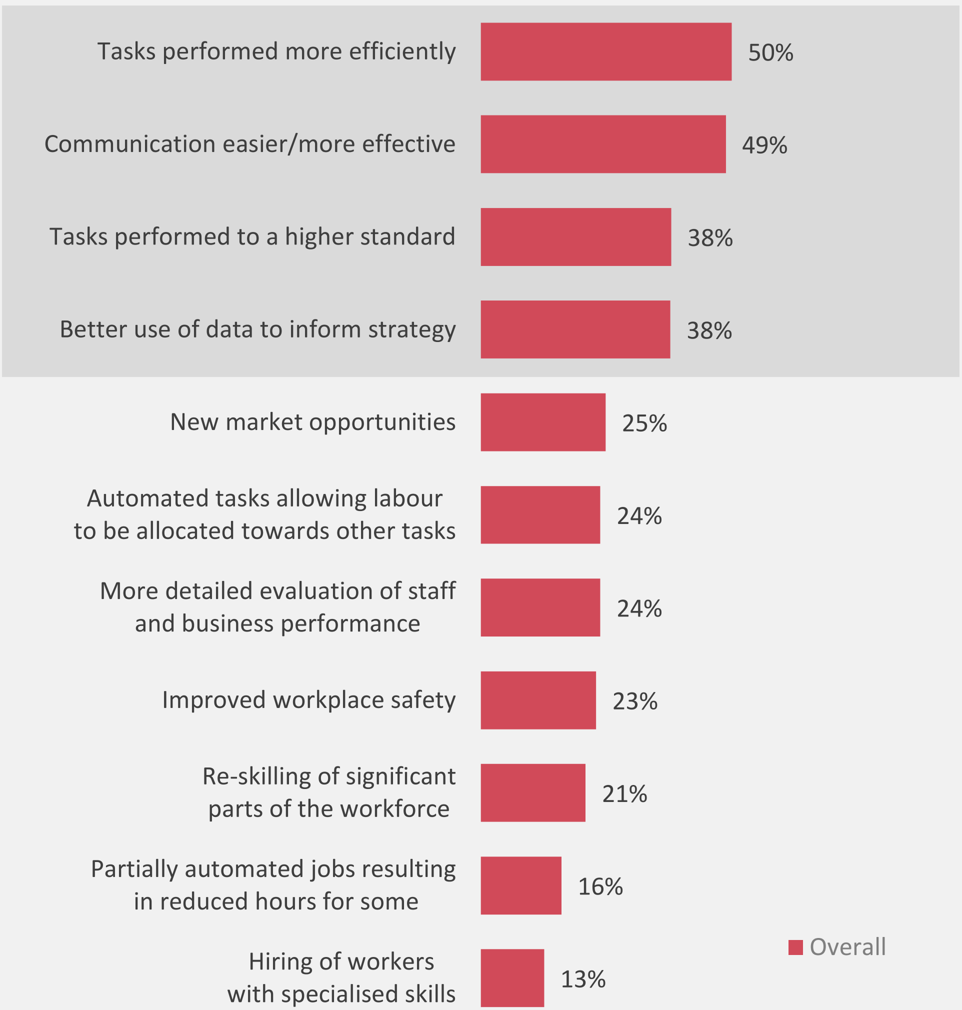
The introduction of new technology has positively impacted surveyed Employers primarily by **allowing tasks to be performed more efficiently and making communication easier and more effective**.

Technology has also allowed tasks to be performed to a higher standard and enabled data to be used to better inform strategy.

For one quarter (24%) of Employers surveyed, new technology has automated certain tasks allowing labour to be allocated towards other tasks.

Less than 1 in 5 (16%) Employers surveyed have reduced hours due to technology partially automating jobs.

IMPACT OF NEW TECHNOLOGY ON ORGANISATION



Base: Employers and Sole Traders who have adopted new technologies (n=583)
T4. How has the introduction of these new technologies impacted your organisation?

REMOTE WORKING ARRANGEMENTS

REMOTE WORKING ARRANGEMENTS
Summary of Findings

EXTENT & EMERGENCE
Around two-thirds (59%) of Employers surveyed offer remote working arrangements and around one third (31%) of Workers surveyed work remotely at least some of the time.

MOTIVES FOR REMOTE WORKING ARRANGEMENTS
The primary reasons that Employers offer remote working arrangements centre around **employee satisfaction**, such as accommodating Workers' family and caring duties, as well as to improve employee retention.

Similarly, the main reasons Workers work remotely centre around **personal lifestyle** benefits, including a better work-life balance, more flexible working hours and to have a more flexible working environment/workspace.

CHALLENGES OF REMOTE WORKING ARRANGEMENTS
The main challenges for Employers in regard to employing Remote Workers centre around **team dynamics:** creating a unified team and the greater effort it takes to coordinate staff, as well as **staff productivity:** the tracking of Remote Worker productivity and performance management.

The main challenges Remote Workers experience also centre around team dynamics: missing internal organisational conversations/debriefs, isolation and less visibility in the workplace and with colleagues.

In contrast to Employers' difficulties with monitoring their Remote Workers' productivity, Remote Workers identify **working longer hours** as a key challenge of their working arrangement.

SPECIFIC INTERPRETATION FOR THIS SECTION
Please note the following when interpreting the Remote Working Arrangements section of the report:

- For the purpose of this report Remote Workers are defined as:
  - Standard Workers who have the same employer year-round and/or have a salary
  - Workers who work at a different location to worksites/offices/ operation sites but are part of the same business.
- Alternative Workers are not included in this section of the report.

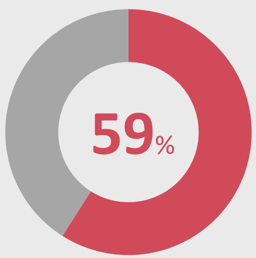
REMOTE WORKING ARRANGEMENTS

Employer Perspective

WHO OFFERS REMOTE WORKING ARRANGEMENTS?

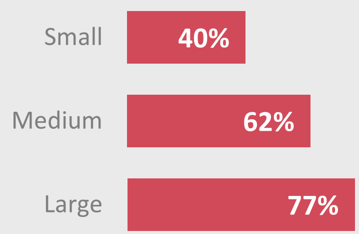
This snap shot shows the prevalence of Employers who offer remote working arrangements within the workforce. Around two-thirds (59%) of Employers surveyed offer remote working arrangements. **Large Employers, governments departments, Employers in SEQ and Employers in the Agriculture, Forestry, Fishing & Mining industries are the most likely to offer remote working arrangements.** A profile of Employers who offer remote working arrangements is available in the appendix.

EXTENT OF REMOTE WORKING

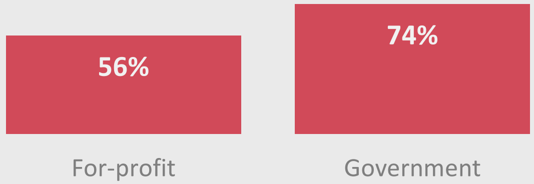


of Employers offer remote working arrangements

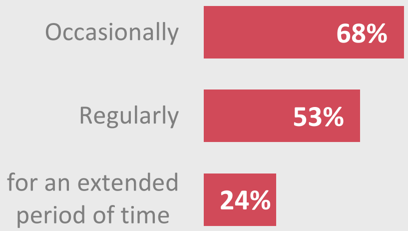
BUSINESS SIZE



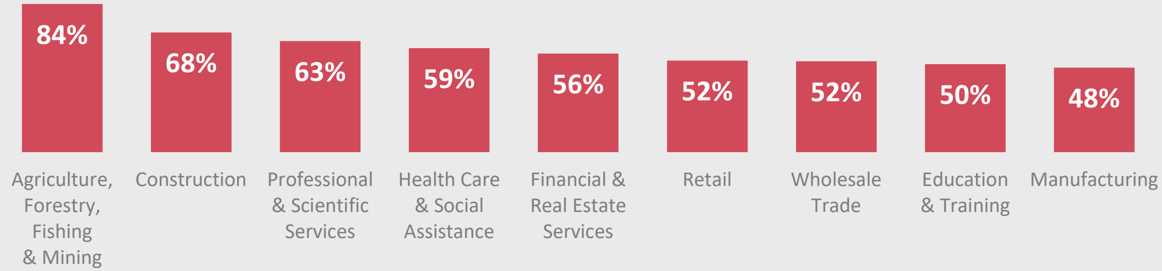
BUSINESS TYPE



Have employees who work remotely…



INDUSTRY



Base: Employers who offer remote working arrangements (n=298)

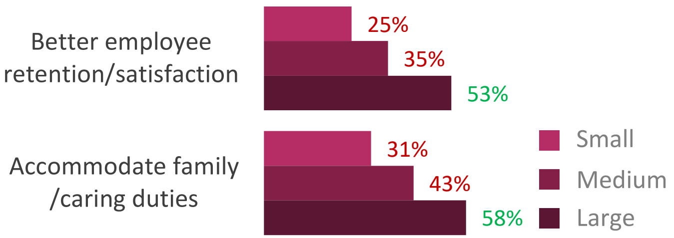
REASONS FOR REMOTE WORKING ARRANGEMENTS

Employers and in particularly large Employers surveyed, offer remote working arrangements primarily to **accommodate family/caring duties and to ensure better employee retention** and satisfaction.

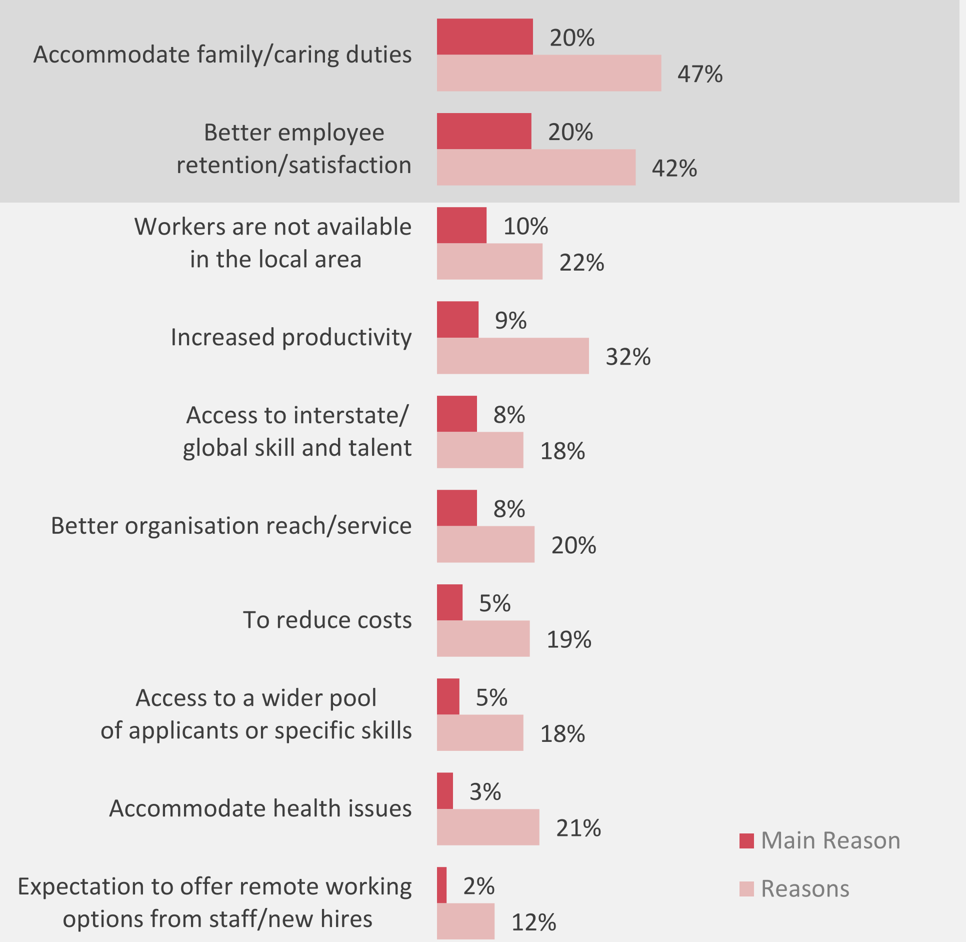
While not exclusively linked to remote working arrangements, some large Employers within the qualitative research identified strategies that involved actively encouraging working from home to reduce organisational floor space and rent.

> *"At the moment, we've got a big strategy to reduce floor space, so we've actively encouraging people to work from home"* Brisbane, Large Employer

DIFFERENCES BY EMPLOYER SIZE



REASONS FOR OFFERING REMOTE WORKING ARRANGEMENTS



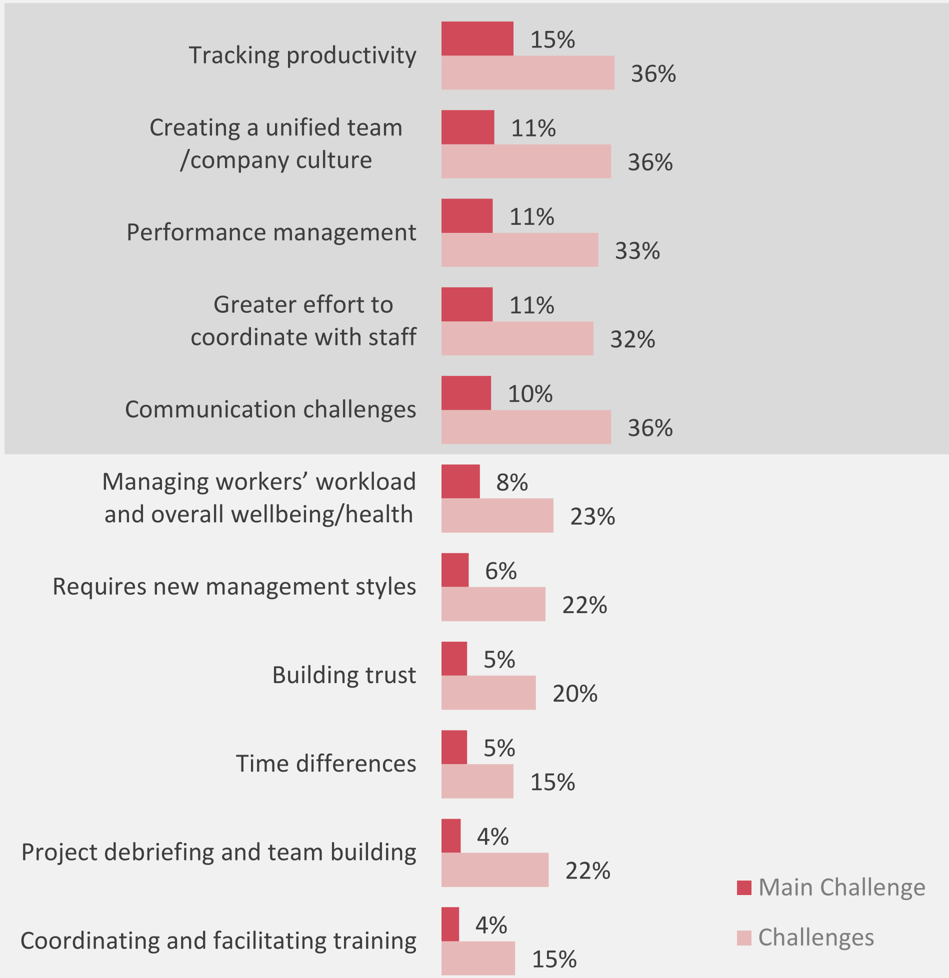
Base: Employers who offer remote working arrangements (n=298)
R3a. Why does your organisation offer remote working arrangements?
R3b. What is the MAIN reason your organisation offers remote working arrangements?

CHALLENGES WITH REMOTE WORKING ARRANGEMENTS

Challenges for surveyed Employers offering remote working arrangements include **tracking productivity and performance management, creating a unified team culture, greater effort required to coordinate staff** and communication challenges.

> *"That'd be the biggest challenge, when you're leading diverse and dispersed teams. Making sure it feels inclusive"* Brisbane, Large Employer
>
> *"I think it's actually harder for managers to manage remotely. We have 200 staff in 41 sites and so trying to keep those people engaged on teams, it's not easy. You spend a lot more time doing it instead of just walking past and saying hi, you're calling them every day, you're Skyping them"* Brisbane, Large Employer

CHALLENGES WITH OFFERING REMOTE WORKING ARRANGEMENTS



Base: Employers who offer remote working arrangements (n=298)
R4a. What are the challenges when offering remote working arrangements?
R4b. What is the MAIN challenge when offering remote working arrangements?

CHALLENGES WITH REMOTE WORKING ARRANGEMENTS

BY EMPLOYER SIZE

Medium and large Employers surveyed who offer remote working arrangements are significantly more likely to have issues with **tracking productivity, coordinating with staff and managing Remote Workers workload/wellbeing**.

Communication and performance management is a challenge regardless of business size.

CHALLENGES WITH OFFERING REMOTE WORKING ARRANGEMENTS
BY EMPLOYER SIZE

Base: Employers who offer remote working arrangements (Small Employer n=72, Medium Employer n=82, Large Employer n=144)
R4a. What are the challenges when offering remote working arrangements?

GREEN figures are significantly greater than RED figures

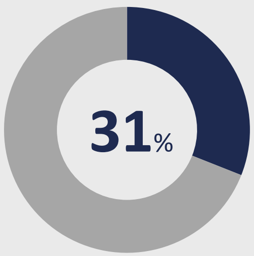
REMOTE WORKING ARRANGEMENTS

Worker Perspective

WHO WORKS REMOTELY?

This snap shot shows the prevalence of Remote Workers within the workforce. Around one third (31%) of Workers surveyed work remotely at least some of the time. **Workers in the Professional & Scientific Services and Financial & Real Estate Services Workers are the most likely to work remotely** at least some of the time. A profile of Remote Workers is available in the appendix.

EXTENT OF REMOTE WORKING



of Workers work remotely at least some of the time

FREQUENCY

Regularly work remotely	37%
Sometimes work remotely	63%

JOB TYPE

Management	48%
Professional	34%
Community or personal service	24%
Clerical or admin	19%
Blue collar	27%
Sales	19%

GENDER & KIDS

38% (male)

27% (female)

38% have children at home

WORK HOURS

Full-time	36%
Part-time	22%
On a casual basis	20%

AGE

Under 25	26%
25 to 34	34%
35 to 44	37%
45 to 54	25%
55 to 64	31%
65+	29%

INDUSTRY

Professional & Scientific Services	47%
Financial & Real Estate Services	46%
Construction	45%
Agriculture, Forestry, Fishing & Mining	45%
Public Order & Safety Services	36%
Transport, Postal and Warehousing	33%
Public Administration Services	31%
Education & Training	29%

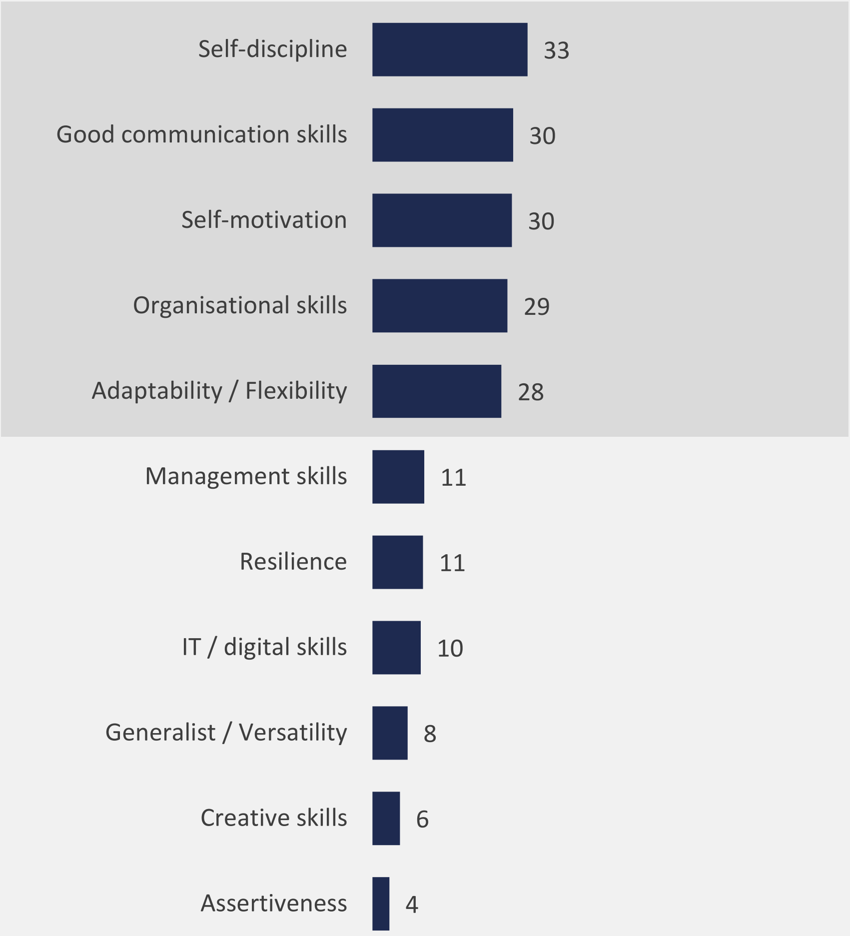
Base: All Remote Workers (n=388)

REMOTE WORKER SKILLS AND ATTRIBUTES

Remote Workers surveyed perceive **self-discipline, good communication skills, self-motivation, organisational skills and adaptability/flexibility as all essential skills** and attributes required for remote work.

PERCEIVED SKILLS AND ATTRIBUTES REQUIRED

RANK SCORE SHOWN



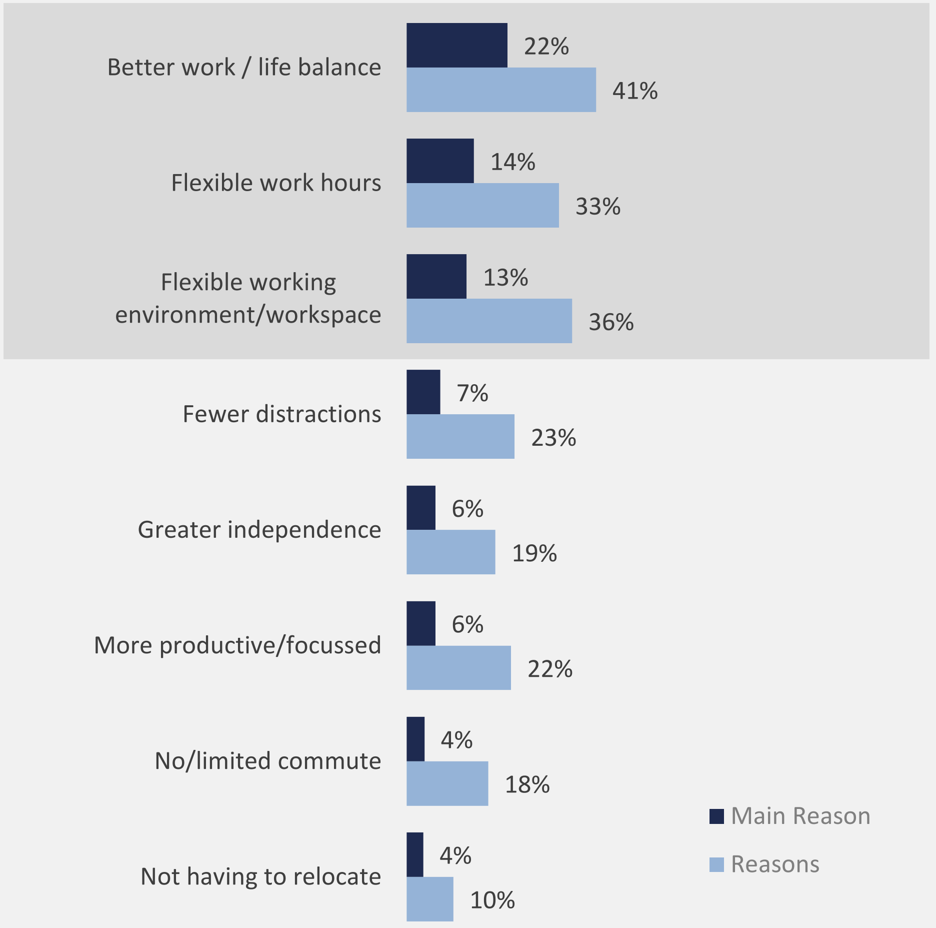
Base: Remote Workers (n=388)
R3. What are the main attributes and skills required to be a Remote Worker? Rank 1, 2, 3, with 1 being the most important

REASONS FOR WORKING REMOTELY

The primary reasons for working remotely include a **better work-life balance, flexible working hours and flexible working environment/workspace**.

The motives for working remotely are consistent across industries.

REASONS FOR WORKING REMOTELY

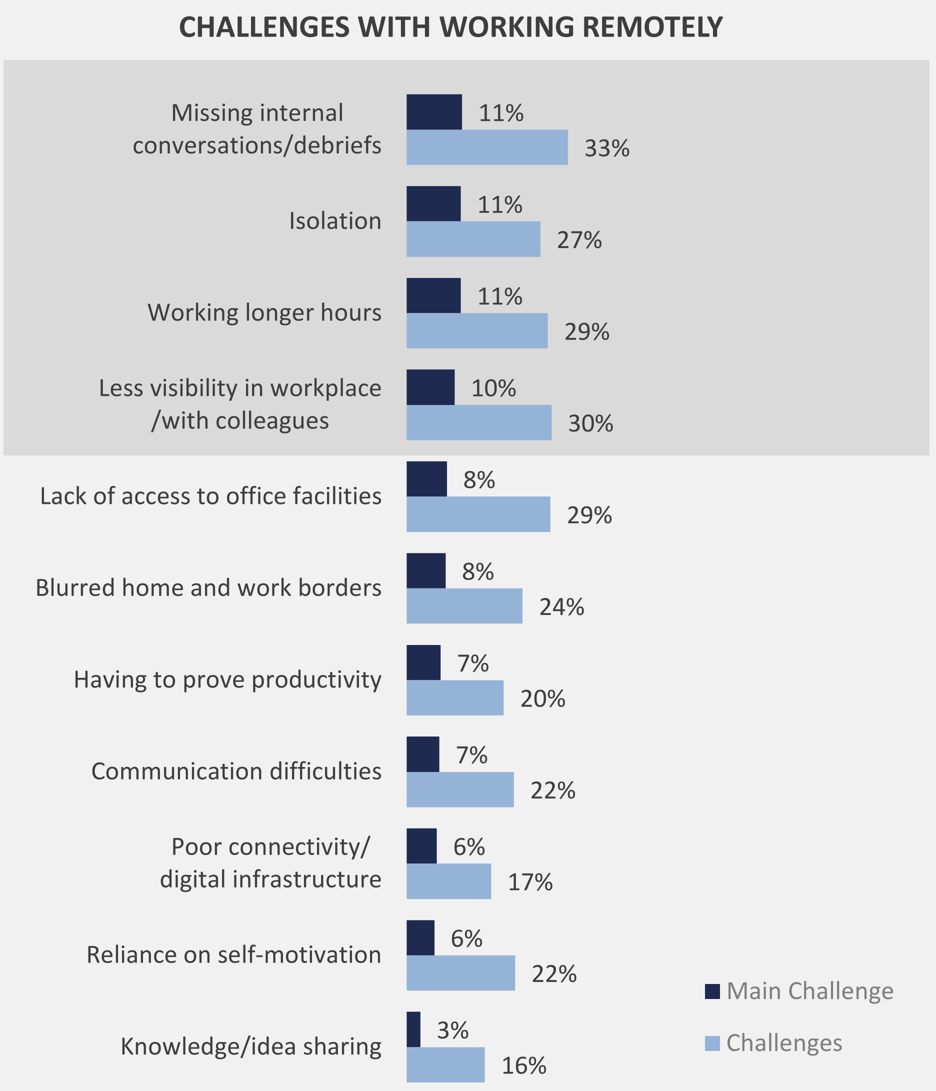


Base: Remote Workers(n=388)
R4a. What are the reasons you work remotely?
R4b. What is the MAIN reason you work remotely?

CHALLENGES WITH WORKING REMOTELY

Remote working presents **challenges due to isolation, missing internal conversations and due to reduced visibility in the workplace** and with colleagues.

The challenges of working remotely are consistent across industries.



Base: Remote Workers(n=388)
R5a. What are the challenges with working remotely?
R5b. What is the MAIN challenge of working remotely?

ALTERNATIVE WORKING ARRANGEMENTS

ALTERNATIVE WORKING ARRANGEMENTS
Summary of Findings

EXTENT & EMERGENCE
Two thirds (67%) of Employers surveyed have hired Alternative Workers in the past three years. Of these Employers, half (55%) are hiring these Workers at the same frequency and almost a third (28%) are hiring more Alternative Workers compared to 3 years ago.

Projecting ahead, two thirds (66%) of these Employers expect to be hiring Alternative Workers at the same frequency in the next three years.

About one in ten Employers (8%) who have never employed Alternative Workers are very likely to employ Alternative Workers in the next three years while the majority (61%) do not expect to employ from this pool of Workers.

MOTIVES FOR ALTERNATIVE WORKING ARRANGEMENTS
The primary reasons that surveyed Employers hire Alternative Workers is to gain access to specialist skills and expertise, followed by greater workforce flexibility and convenience, as well as fixing temporary overcapacity issues.

From the Alternative Worker perspective, more flexible hours, additional income and a greater work-life balance are the main drivers for their alternative work arrangements.

CHALLENGES OF ALTERNATIVE WORKING ARRANGEMENTS
From a business perspective, **the main challenges of employing Alternative Workers is retaining and sharing knowledge within the business** and performance and quality control of work.

The **main challenges of working as an Alternative Worker centre around the instability of their work:** the unpredictable and fluctuating income, lack of job security and irregular hours.

SPECIFIC INTERPRETATION FOR THIS SECTION
Please note the following when interpreting this section of the report.

- For respondents who have multiple jobs, their answers are based on their primary alternative job, i.e. the job which they work the most hours.
- The categorisation of ‘alternative work’ used in this Social Research Project differs slightly from that used by Jobs Queensland in their Future of Work project.

ALTERNATIVE WORKING ARRANGEMENTS
Summary of Findings CONT'D

DIFFERENT TYPES OF ALTERNATIVE WORKERS
Certain challenges were faced in trying to identify sub-categories of Alternative Workers such as Gig Economy Workers and Digital Nomad Workers. Using the available data, six sub-categories of Alternative Workers were identified.

Of Alternative Workers Surveyed

- ***15%** were identified as **Gig Economy Workers***
  Source their work via 'traditional' Gig Economy platforms and apps (largely self employed and task- based on on-demand Workers)
- ***3%** were identified as **Digital Nomad Workers***
  Self employed Workers who primarily performed on a computer and have no permanent office location, conducting their work while they travel or move about in multiple areas)
- ***19%** were identified as **Digital & Stationary Workers***
  Self employed Workers who primarily perform their work on a computer however, conduct their work from a single location (e.g. home office or co-working space)
- ***12%** were identified as **Stationary Non-Digital Workers***
  Self employed Workers whose work is not primarily performed on a computer and conduct their work from a single location (e.g. home office or co-working space)
- ***21%** were identified as **Roamers***
  Self employed Workers whose work is not primarily performed on a computer and either requires them to be in a vehicle or at specific locations
- ***30%** were identified as **Non-categorised Alternative Workers***
  These Workers have a mixture of characteristics however, do not align with previous sub-categorisations and lack consistent characteristics large enough to be unique identifiers

Due to the self identification challenges (explored within this report) these six sub-categorisations of Alternative Workers are not a complete representation of Alternative Workers. However these multiple sub-categorisations and high proportion of Non-categorised Alternative Workers (30%) provide a unique snap shot of Alternative Workers and their working arrangements revealing that these Workers are more complex and diverse than previous considered.

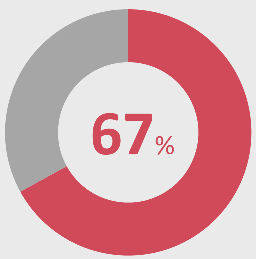
ALTERNATIVE WORKER ARRANGEMENT

Employer Perspective

WHO EMPLOYS ALTERNATIVE WORKERS?

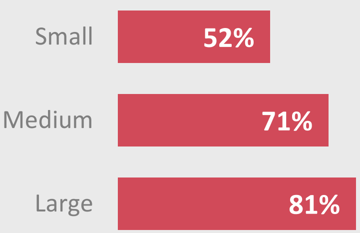
This snap shot shows the prevalence of Employers who hire Alternative Workers within the workforce. Two-thirds (67%) of Employers surveyed have hired Alternative Workers in the past 3 years. **Large Employers, government departments and business in the Agriculture, Forestry, Fishing & Mining, Education & Training and Construction industries are the most likely to have hired Alternative Workers in the past 3 years.** A profile of Employers who hire Alternative Workers is available in the appendix.

EXTENT OF ALTERNATIVE WORK

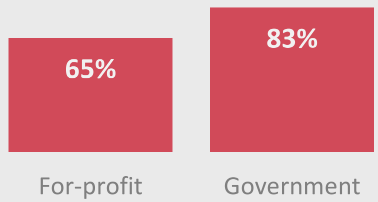


of Employers have hired an Alternative Worker in the past 3 years

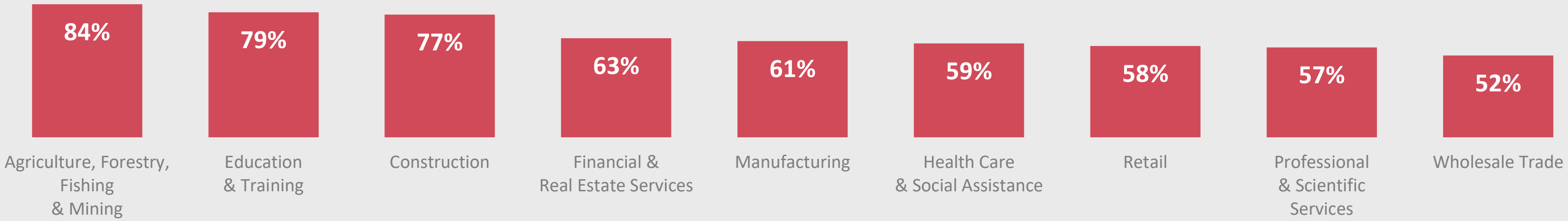
BUSINESS SIZE



BUSINESS TYPE



INDUSTRY



Base: Employers who hire Alternative Workers (n=340)

CHANNELS USED FOR HIRING EMPLOYEES

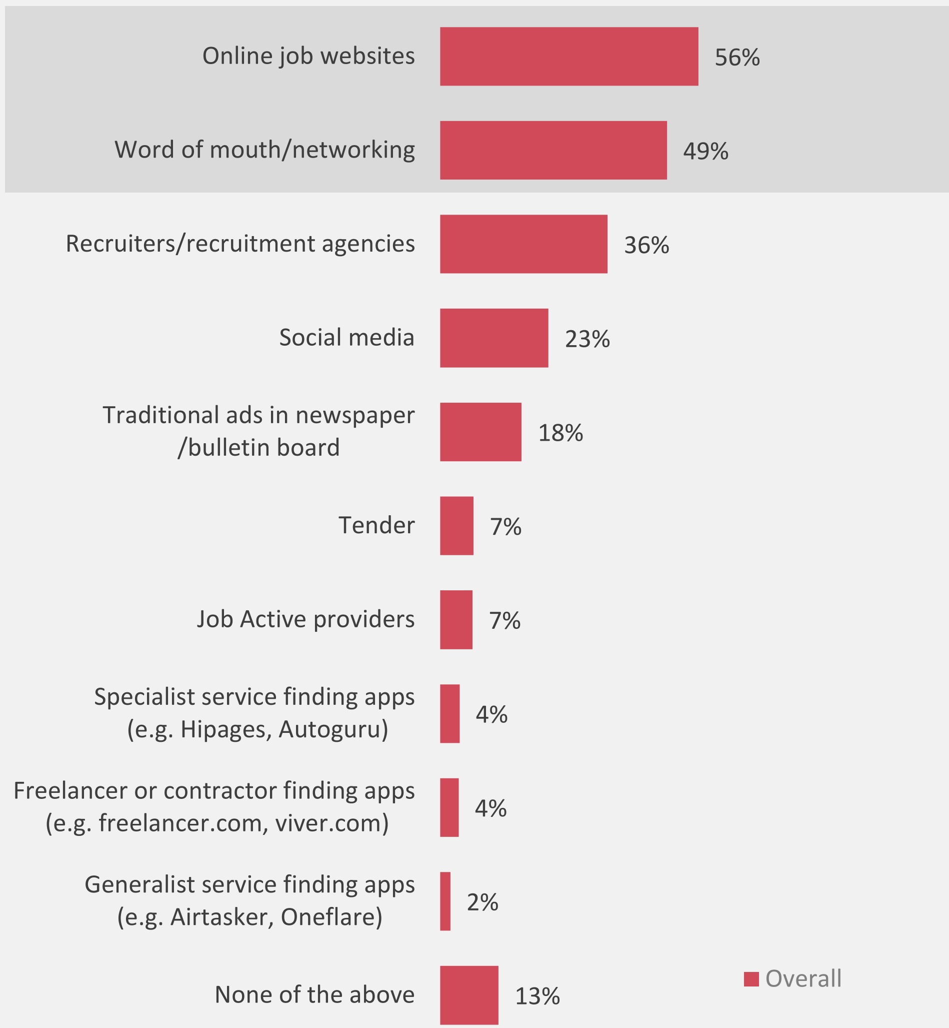
Over the past 3 years most Employers surveyed have hired Workers through **online job websites and word of mouth**.

While Employers are aware that they can access Workers/Alternative Workers through a number of services, many still prefer sourcing work through recruiters.

For time-poor Employers, **recruiters make it easier to find the right Workers and handle the time consuming and mundane tasks of checking off applicants obligatory qualification criteria**.

> *"We traditionally go to recruiters, because there are always 100 applicants for one job, and it's time management. Recruiters, you pay them to weed it down to five people, so all these other platforms, still, you're having to weed through that with people"* Brisbane, Large Employer

SOURCES USED TO HIRE WORKERS

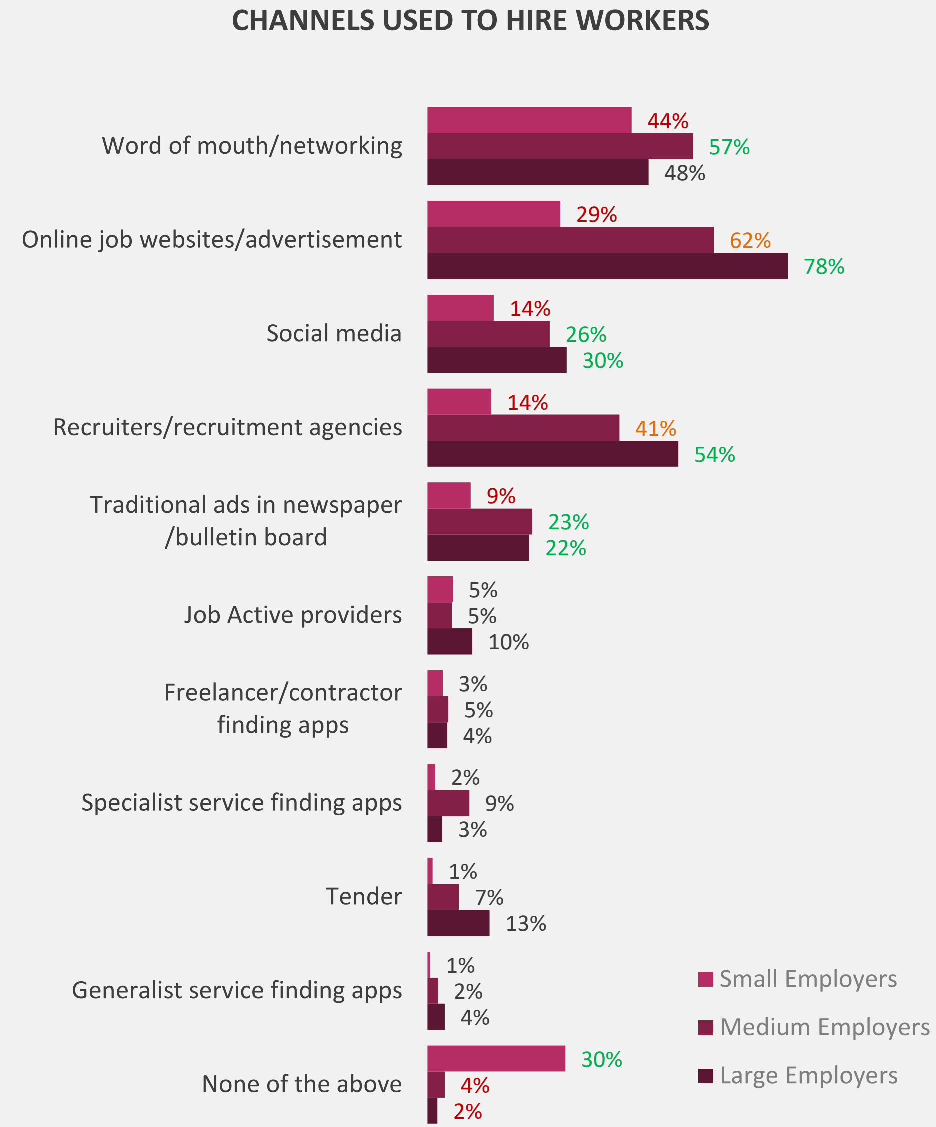


Base: All Employers (n=502)
W2. In the past 3 years, has your organisation hired Workers through any of the following channels?

CHANNELS USED FOR HIRING EMPLOYEES

BY EMPLOYER SIZE

Large Employers surveyed are significantly more likely to use online job websites and recruitment agencies. Word of mouth is the main channel used by small Employers to hire Workers.



GREEN, ORANGE and RED figures are significantly different from each other

Base: All Employers (Small Employer n=182, Medium Employer n=133, Large Employer n=187)
W2. In the past 3 years, has your organisation hired Workers through any of the following channels?

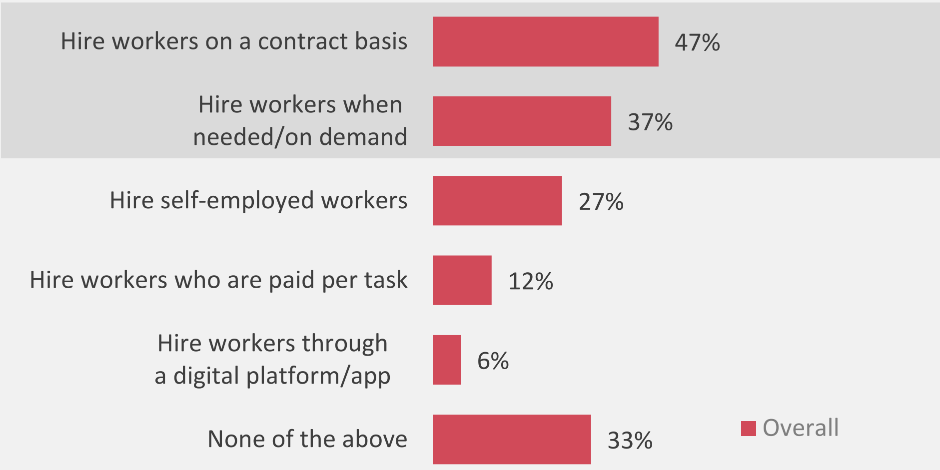
TYPES OF WORKERS EMPLOYED

Half (47%) of Employers surveyed hired Workers on a contract basis in the past 3 years.

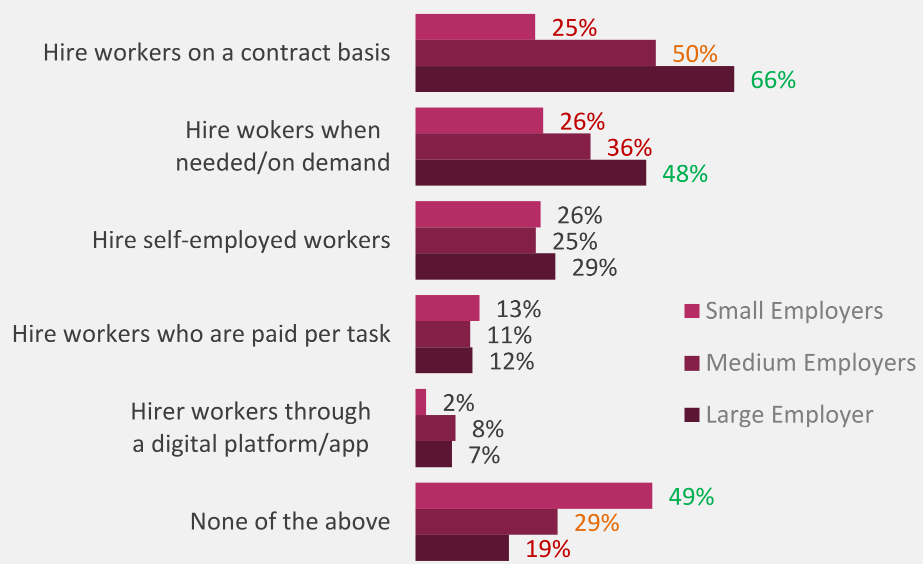
Four in ten (37%) Employers self-report that they have hired Workers on-demand and 12% reported hiring Workers who are paid per task.

This discrepancy between Workers being hired on-demand and Workers being paid per task, suggests that there is some confusion with this terminology which may need to be addressed.

TYPES OF WORKERS EMPLOYED IN PAST 3 YEARS



TYPES OF WORKERS EMPLOYED IN PAST 3 YEARS
BY EMPLOYER SIZE



GREEN, ORANGE and RED figures are significantly different from each other

Base: All Employers (n=502, Small Employer n=182, Medium Employer n=133, Large Employer n=187)
W1a. Within the past 3 years has your organisation hired any of the following types of Workers?

ALTERNATIVE WORKER TASKS

The majority of surveyed Employers who hire Alternative Workers do so to **fill specialist roles** within the business.

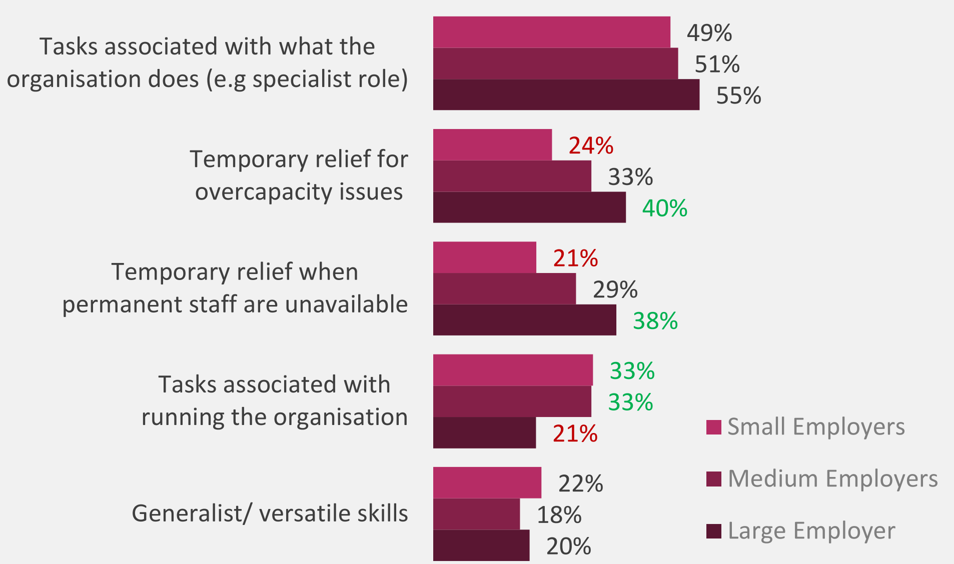
One third utilise Alternative Workers **to relieve temporary overcapacity issues and/or temporary permanent staff unavailability.**

Large Employers are significantly more likely to hire Alternative Workers to address overcapacity or staff unavailability issues.

Small and medium Employers are significantly more likely to hire Alternative Workers for general tasks associated with the running of the business.

TASKS ALLOCATED TO ALTERNATIVE WORKERS

TASKS ALLOCATED TO ALTERNATIVE WORKERS
BY EMPLOYER SIZE



GREEN figures are significantly greater than RED figures

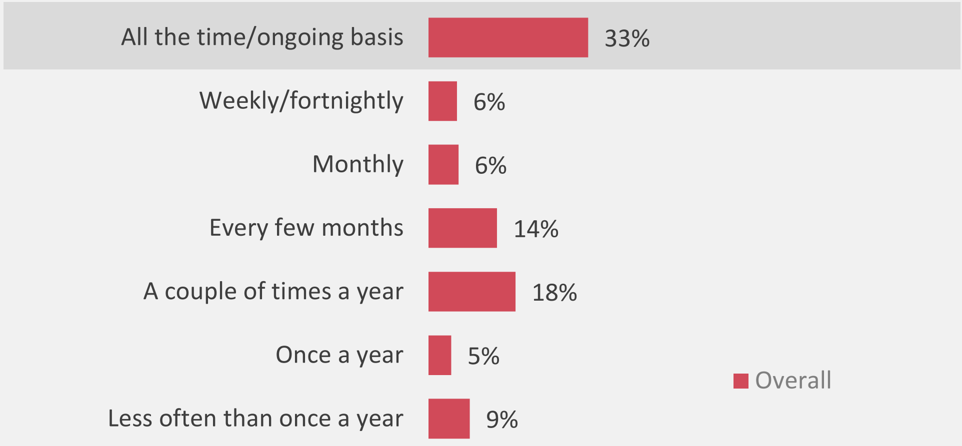
Base: Employers who hire Alternative Workers (n=340, Small Employer n=94, Medium Employer n=95, Large Employer n=151)
AW2. Within your organisation, for what tasks do you typically employ Alternative Workers?

FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS

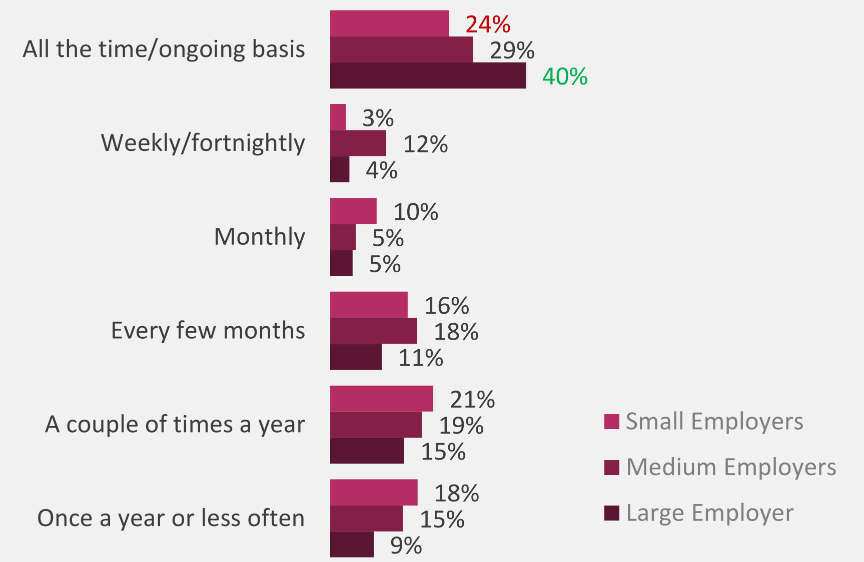
One third (33%) of Employers surveyed who hire Alternative Workers do so on an ongoing basis, while another third (32%) hire these Workers a couple times a year or every few months.

Large Employers are significantly more likely to hire Alternative Workers on an on-going basis.

FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS



FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS BY EMPLOYER SIZE



GREEN figures are significantly greater than RED figures

Base: Employers who hire Alternative Workers (n=340, Small Employer n=94, Medium Employer n=95, Large Employer n=151)
AW3. How often does your organisation employ Alternative Workers?

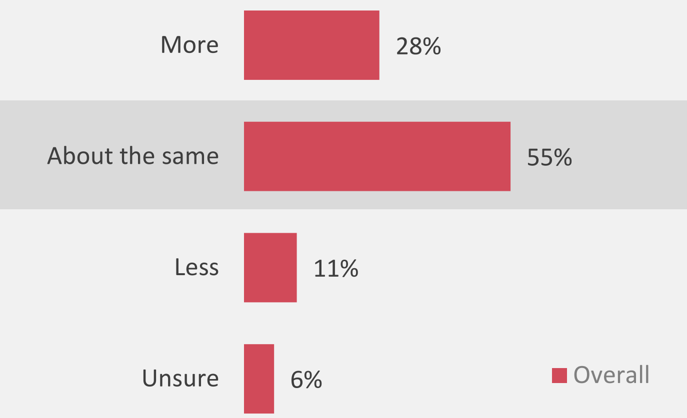
FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS COMPARED TO 3 YEARS AGO

Of the Employers who currently hire Alternative Workers, **around half are employing these Workers at the same frequency as they did 3 years ago.**

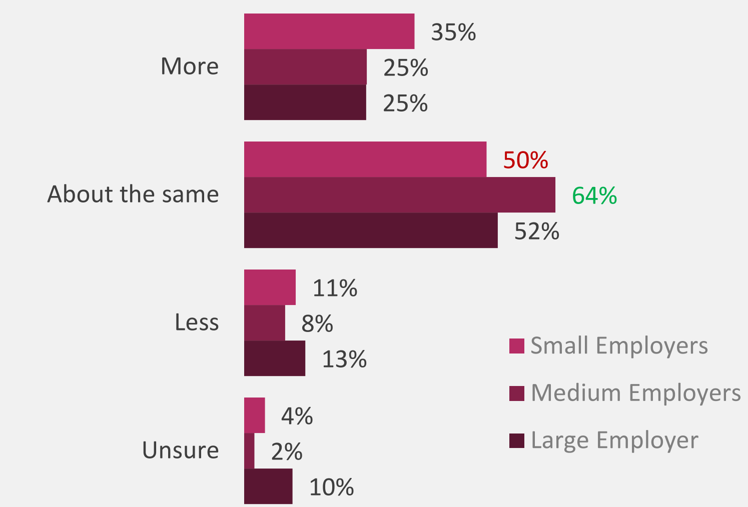
Just under one third of Employers who currently employ Alternative Workers are doing so more often than they did 3 years ago.

Base: Employers who hire Alternative Workers (n=340, Small Employer n=94, Medium Employer n=95, Large Employer n=151)
AW4. Compared to 3 years ago, is your organisation employing Alternative Workers?

FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS COMPARED TO 3 YEARS AGO



FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS COMPARED TO 3 YEARS AGO
BY EMPLOYER SIZE



GREEN figures are significantly greater than RED figures

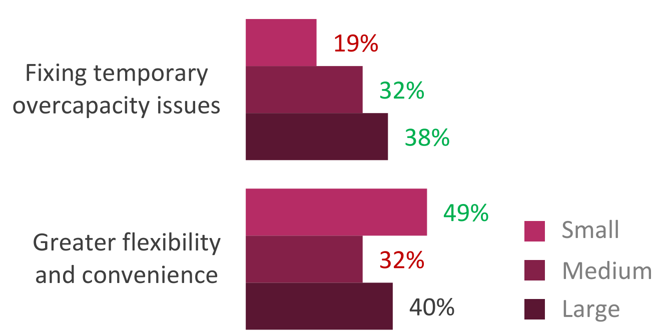
REASONS FOR EMPLOYING ALTERNATIVE WORKERS

The primary motive for hiring Alternative Workers is **to gain access to specialist skills and expertise**. Secondary reasons include greater flexibility and convenience, fixing temporary overcapacity issues and cost efficiencies.

Small Employers surveyed are significantly more likely to hire Alternative Workers for greater flexibility and convenience and significantly less likely to hire them to fix overcapacity issues.

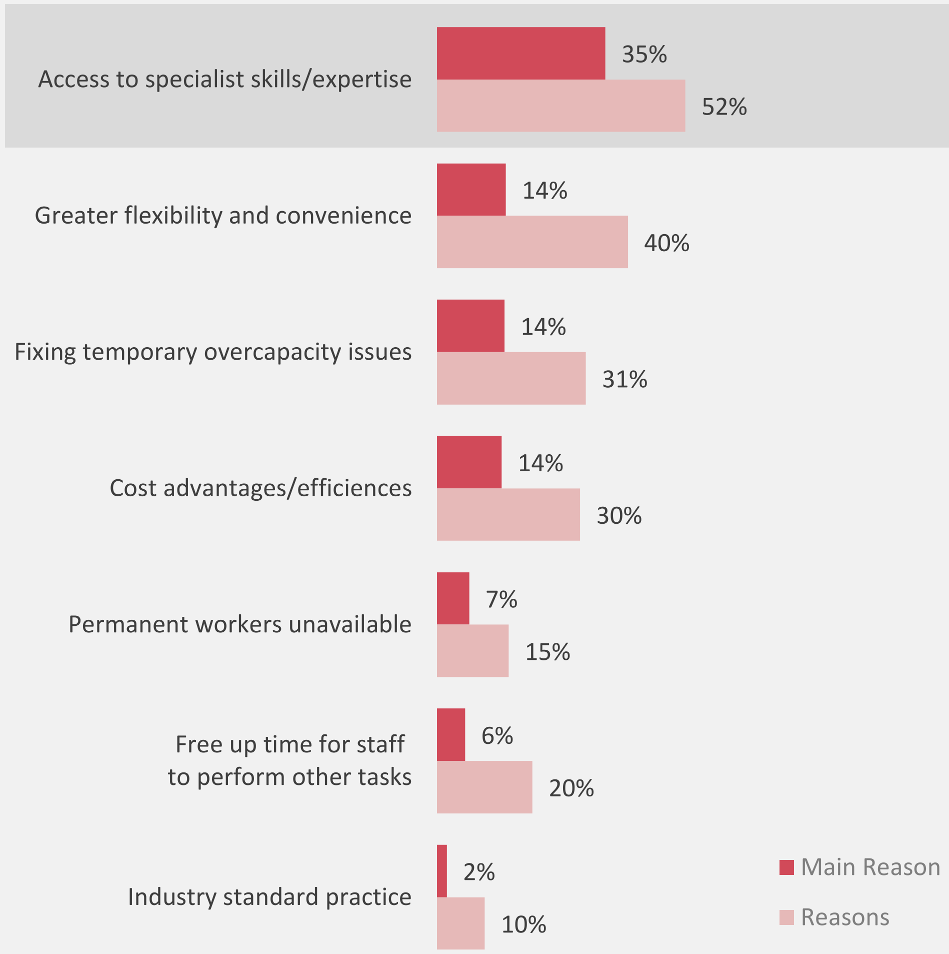
The reasons for employing Alternative Workers are the same across industries.

REASON BY EMPLOYER SIZE



Base: Employers who hire Alternative Workers (n=340)
AW5a. What are the reasons your organisation employs Alternative Workers?
AW5b. What is the MAIN reason your organisation employs Alternative Workers?

REASON FOR EMPLOYING ALTERNATIVE WORKERS



GREEN figures are significantly greater than RED figures

REASONS FOR EMPLOYING ALTERNATIVE WORKERS

WORKFORCE FLEXIBILITY

Within the qualitative research the motivation of hiring Alternative Workers for greater workforce flexibility and convenience tended to differ amongst small-medium Employers and large Employers.

Some large Employers identified Alternative Workers as a cheaper and more convenient Alternative to permanent staff. Alternative Workers due to their contract nature make it easier to balance organisational workflow and capacity by ending or extending contracts. This simplifies and reduces the costs of redundancies and hiring requirements.

Some large Employers within the qualitive focus groups acknowledge that a non-permanent and contract based workforce was a deliberate organisational strategy to reduce costs and increase workforce convenience and flexibility.

> *"A lot of the organisations that are in the human service sector are moving from block funded to user pay fee for service type model, so that you have to be really flexible with that, which means it's good, for those who want casual work, but the permanent 9:00 to 5:00 work is becoming less so"* Brisbane, Large Employer

Small-medium Employers differed in this regard, as they tended to consider Alternative Workers as a way to either access additional or specialist skills and capabilities of these Workers for their business when workload hours were not sufficient to support a permanent role.

> *"In a smaller business I could never afford to have somebody to spend 10 hours a week doing that in my business. We should be looking at utilising those external services. Just shopping around until we can find somebody that we like that understands our industry"* Cairns, Small-Medium Employer

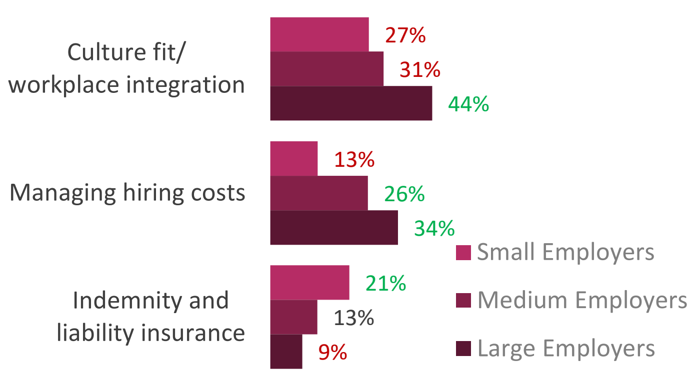
CHALLENGES OF EMPLOYING ALTERNATIVE WORKERS

The primary challenges with employing Alternative Workers are **knowledge retention and sharing as well as performance management and/or quality control**.

Large Employers surveyed are significantly more likely to have issues with culture fit and managing hiring costs than small Employers.

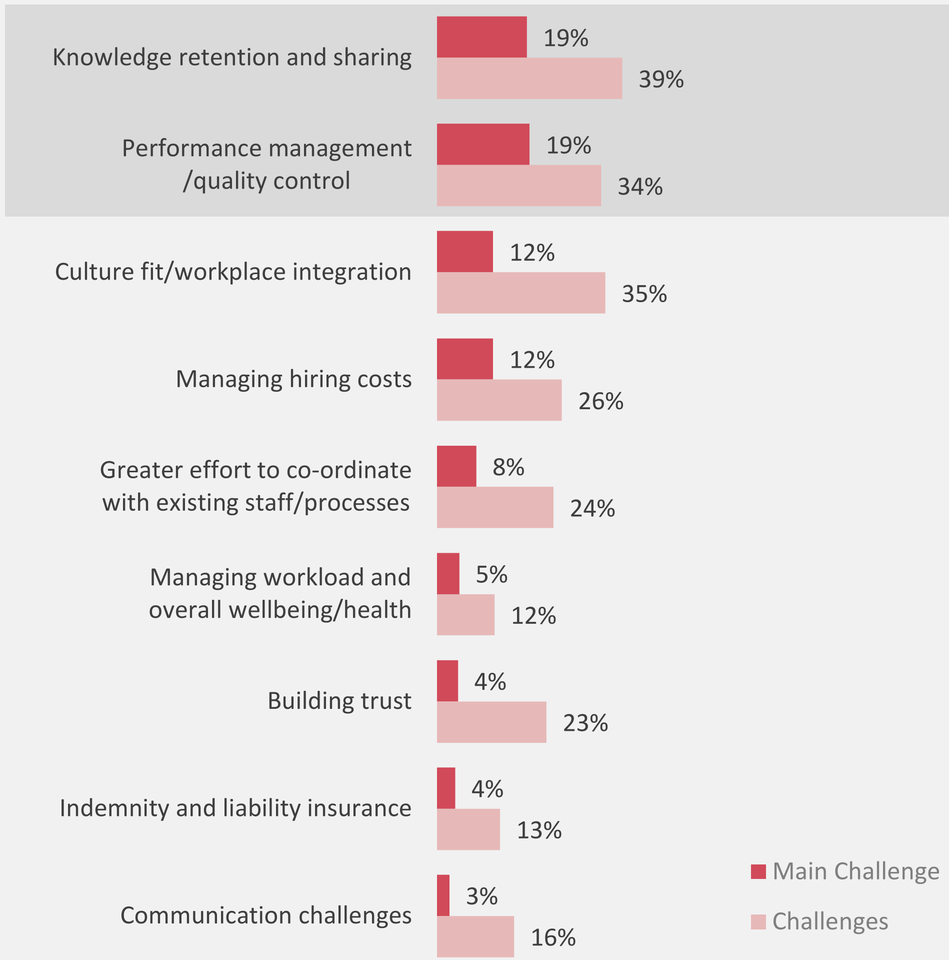
The challenges with employing Alternative Workers are the same across industries.

CHALLENGES BY EMPLOYER SIZE



Base: Employers who hire Alternative Workers (n=340)
AW6a. What are the challenges when employing Alternative Workers?
AW6b. What is the MAIN challenge when employing Alternative Workers?

CHALLENGES WITH EMPLOYING ALTERNATIVE WORKERS



GREEN figures are significantly greater than RED figures

CHALLENGES OF EMPLOYING ALTERNATIVE WORKERS CONT'D

KNOWLEDGE RETENTION

Within the qualitative research large Employers identified the temporary nature of Alternative Workers **created a challenge of knowledge sharing within their business**, as these Workers often moved on quickly and lessons learnt from a project are not integrated into the business for future usage.

> *"There's a lot of missed shared learnings, particularly in our space, where things are changing rapidly"* Brisbane, Large Employer

> *"We're losing a lot of knowledge and we're not really replacing it and we've got to sort of tap into what we can do to make those people stay, because it's with that time that you get those specialist knowledge built up. It's a big problem"* Brisbane, Large Employer

> *"There's less ability to come back and reflect, debrief"* Brisbane, Large Employer

TRUST

Within the qualitative research, finding **the right Alternative Worker and trusting them** with an aspect of their business was a key concern of employing these types of Workers.

Concern and trust of the Alternative Worker was expressed slightly more amongst small Employers, than large ones.

> *"But it's scary. Its like giving someone else that control the right stuff on your Facebook page"* Cairns, Small-Medium Employer

> *"Security in terms of access to organisation's information"* Brisbane, Small-Medium Employer

> *"I think it's trust. I have tonnes of staff that work from home. Call Centre staff, tonnes, no issues. It's just trust"* Brisbane, Large Employer

CHALLENGES OF EMPLOYING ALTERNATIVE WORKERS CONT'D

TEAM INTEGRATION & MORAL

Large Employers also identified that having temporary and sometimes remote team members created challenges for them in regards to **ensuring team integration and dynamics**.

They acknowledge that the changing nature of their team members' working arrangements was leading to shifts in their management practises.

> *"I think it's actually harder for managers to manage remotely. We have 200 staff in 41 sites and so trying to keep those people engaged on teams, it's not easy. You spend a lot more time doing it instead of just walking past and saying hi, you're calling them every day, you're Skyping them"* Brisbane, Large Employer

> *"Communication can break down at sites if you don't have that relationship, so certainly having things like Skype, where you can actually have the face to face contact, has helped make our remote team members feel more included"* Brisbane, Large Employer

WORKFORCE CO-ORDINATION

While workforce flexibility is considered an advantage of employing Alternative Workers, some large Employers within the qualitative research identified that **the flexibility of their Alternative Workforce has led to their business needing to develop new practices** and even departments to assist in the management of their flexible workforce.

> *"Our organisation has had to create a subsidiary to co-ordinate the work of flexible [contract] Workers"*
> *Brisbane, Large Employer*

Some other large Employers identified that the flexibility of their new Alternative Workforce was actually **costing more than a permanent workforce**, so measures were being taken to hire more permanent staff.

> *"We've just changed organisational structure, and then we've gotten rid of some roles, and then we've outsourced it, and then we've realised, actually, that's costing us a lot more money doing it that way, so now we're trying to weave things back in"* Brisbane, Large Employer

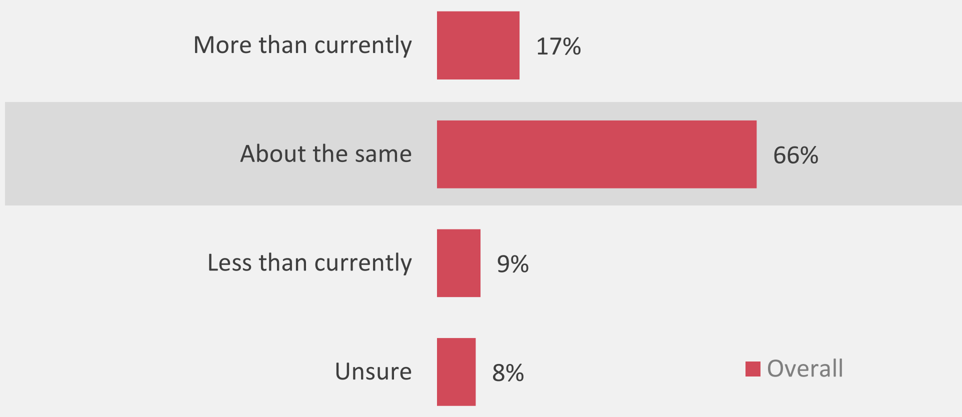
FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS IN NEXT 3 YEARS

Of those Employers who employ Alternative Workers, **two-thirds expect to continue to hire them at the same frequency in the next 3 years**.

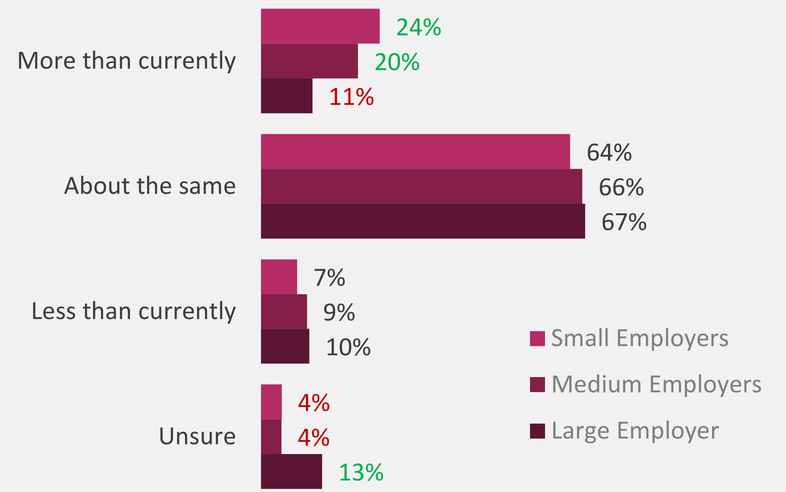
Around one fifth expect to increase their employment of Alterative Workers in the next 3 years.

Around one quarter of small Employers and one fifth of medium Employers who currently hire Alternative Workers, expect to utilise them more often in the next 3 years.

FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS IN NEXT 3 YEARS



FREQUENCY OF EMPLOYING ALTERNATIVE WORKERS IN NEXT 3 YEARS
BY EMPLOYER SIZE



Base: Employers who hire Alternative Workers (n=340, Small Employer n=94, Medium Employer n=95, Large Employer n=151)
AW7. In the next 3 years, is your organisation likely to employ Alternative Workers?

GREEN figures are significantly greater than RED figures

LIKELIHOOD OF EMPLOYING ALTERNATIVE WORKERS IN THE NEXT 3 YEARS

Of those Employers surveyed who do not currently employ Alternative Workers, two-thirds do not expect to hire them in the next 3 years.

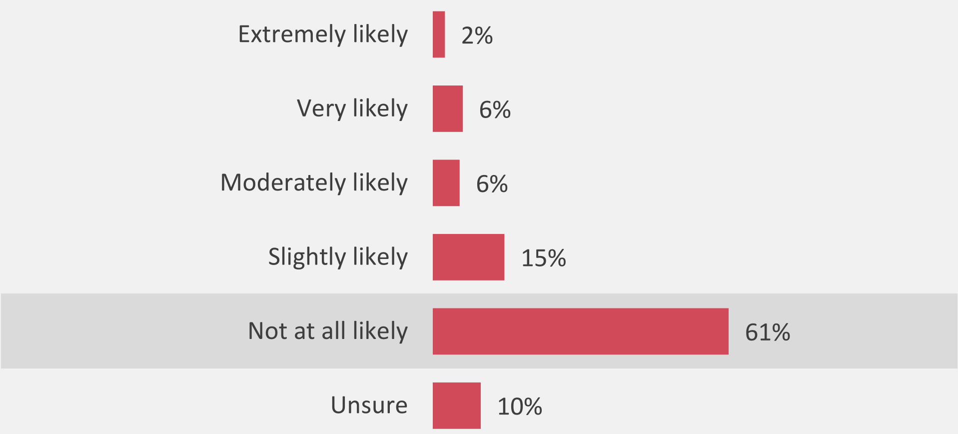
Around 1 in 10 of these Employers are very to extremely likely to hire Alternative Workers in the near future. This will most likely be due to an increase in demand, needing access to specialised skills and/or to save on costs.

Within the qualitative research both Employers and Workers expected Employers to continue to provide more flexible working arrangements, in the form of remote working to their employees.

However, **if these more flexible working arrangements take on a more temporary nature (in the form of contract work) concern was expressed about job security.**

Base: Employers who do not employ Alternative Workers (n=162)
AW8. Is your organisation likely to employ Alternative Workers over the next 3 years?
AW9. Why is your organisation likely to employ Alternative Workers over the next 3 years?

LIKELIHOOD OF EMPLOYING ALTERNATIVE WORKERS IN NEXT 3 YEARS
EMPLOYERS WHO HAVE NEVER EMPLOYED ALTERNATIVE WORKERS



REASON FOR BEING LIKELY TO HIRE ALTERNATIVE WORKERS
QUANTITATIVE OPEN RESPONSE

“Too expensive and too much compliance to employ permanent Workers”

“We will require flexibility in the work force”

“Outsource non-core business to specialist”

“Requiring access to high level skillsets without having fulltime opportunities”

“Sometimes we need specialist skills for a short period of time”

“To meet seasonal demand”

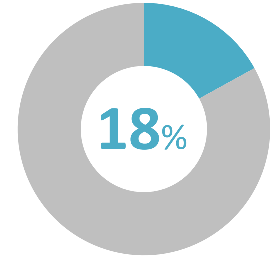
“Unexpected increase in demand”

ALTERNATIVE WORKING ARRANGEMENTS

Worker Perspective

Alternative Workers

This segment reflects almost one fifth of Workers surveyed. The majority identify as self employed and work across a range of industries. The majority have a single alternative job while one fifth have more than one job (standard or an additional alternative job). They undertake their work in a variety of locations.



% OF WORKERS SURVEYED

NUMBER & TYPE OF JOBS

68% have one job and it's an alternative job

11% have a standard main job and a second alternative job

9% have two alternative jobs

FUTURE OUTLOOK

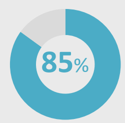
14% Temporary

52% Foreseeable future

20% Long term career

14% Unsure

TENURE



describe themselves as self-employed

Less than 3 months	8%
3 - 6 months	7%
7 - 12 months	10%
1 to 2 years	16%
3 to 5 years	17%
6 to 10 years	11%
More than 10 years	23%

WORK LOCATION

Home office	48%
Require in a specific location	29%
No permanent location	16%
Space provided by employer	13%
Required to be in a vehicle	12%
Co-working spaces	9%
Work while on personal travel	8%
At a coffee shop/library etc	5%

WORK HOURS

Full-time	33%	**40hrs** Full-time
Part-time	22%	**20hrs** Part-time
On a casual basis	21%	**14hrs** Casual
On demand/ad hoc	24%	**18hrs** ad hoc

AGE & GENDER

45% (male)

55% (female)

Under 25	5%
25 to 34	11% ↓
35 to 44	18%
45 to 54	23%
55 to 64	26%
65+	17% ↑

INDUSTRY

Administrative & Support Services	11%
Professional & Scientific Services	10%
Retail	10%
Health Care & Social Assistance	8%
Transport, Postal & Warehousing	8%
Education & Training	6%
Personal Services	5%
Construction	5%
Arts, Broadcasting & Publishing	5%

Base: All Alternative Workers (n=266)

Figures are significantly higher ↑ or lower ↓ than Standard Workers

HOW ALTERNATIVE WORKERS DESCRIBE THEMSELVES

Various terms are used by surveyed Alternative Workers to describe their work, **the most common being freelancers, contractors and consultants**.

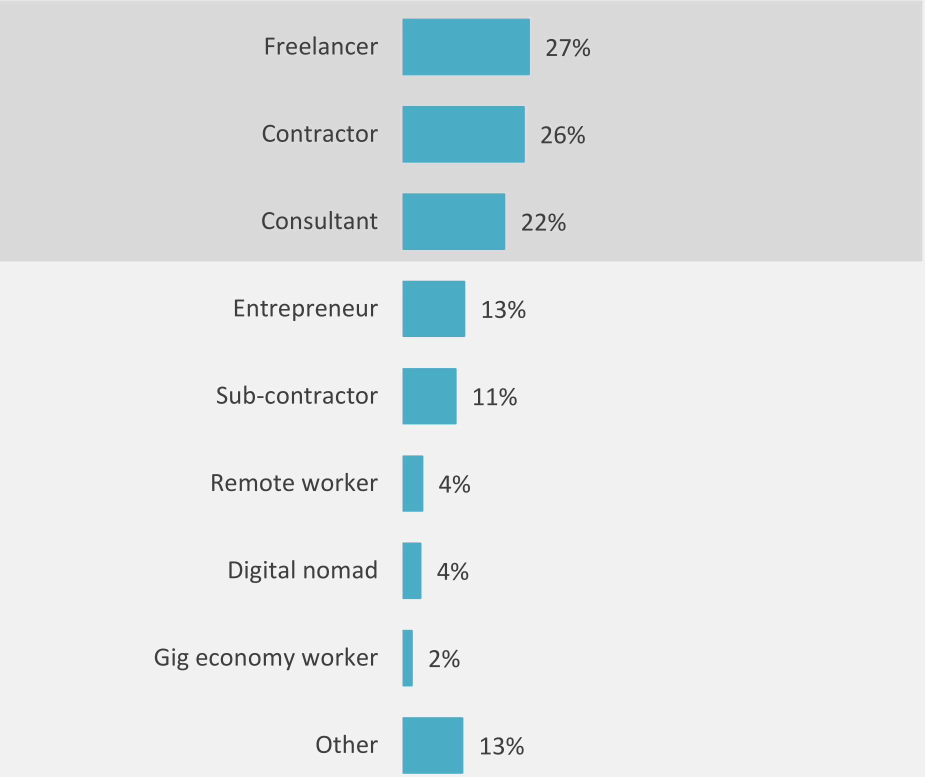
The **terms "Digital Nomad" and "Gig Economy" Worker are not common terms used by Alternative Workers** to describe themselves or the type of work they do.

This finding reflects the qualitative research which also found that Alternative Workers do not strongly identify with the terms "Digital Nomad Workers" or "Gig Economy Workers" within their professional context.

This was especially the case for those classified as Digital Nomad Workers.

The majority of Digital Nomad Workers personally identified as freelancers and contractors, with some suggesting the term Digital Nomad could have a negative impact on their business as it carries with it connotations of not being reliable or serious about work.

TERMS ALTERNATIVE WORKERS USE TO DESCRIBE THE TYPE OF WORK THEY DO



Base: All Alternative Workers (n=266)
AW5. Which of the following terms would you use to describe the type of work you do as an Alternative Worker?

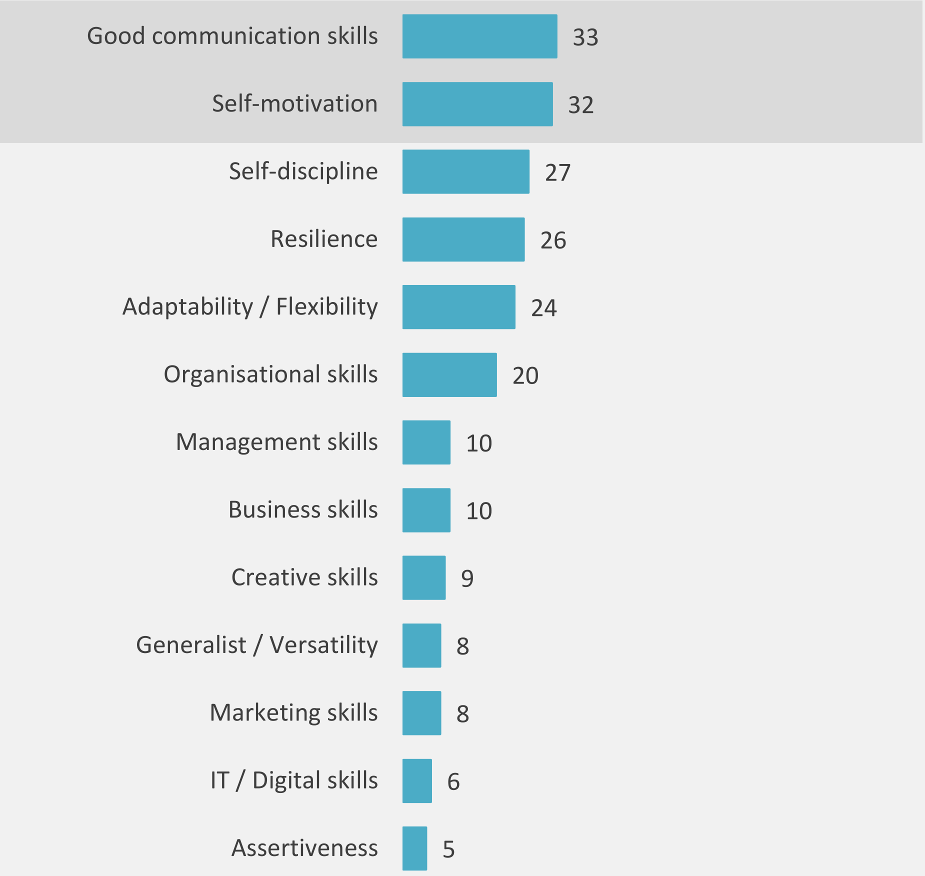
ALTERNATIVE WORKER SKILLS AND ATTRIBUTES

Alternative Workers surveyed perceive **good communication skills, self-motivation, self-discipline and resilience as the most important** skills and attributes to have as an Alternative Worker.

"My #1 has always been communication skills, followed by the ability to fix things relatively quickly and stay on the pulse with new tools/new methods of doing things" Digital Nomad Worker

"Flexibility, resilience, confidence, self-belief, drive" Digital Nomad Worker

ATTRIBUTES AND SKILLS ALTERNATIVE WORKERS FEEL ARE MOST IMPORTANT



Base: All Alternative Workers (n=266)
AW6. Which of the following attributes and skills do you feel are the most important to be an Alternative Worker?
Rank 1, 2, 3 with 1 being the most important

HOW ALTERNATIVE WORKERS SOURCE WORK

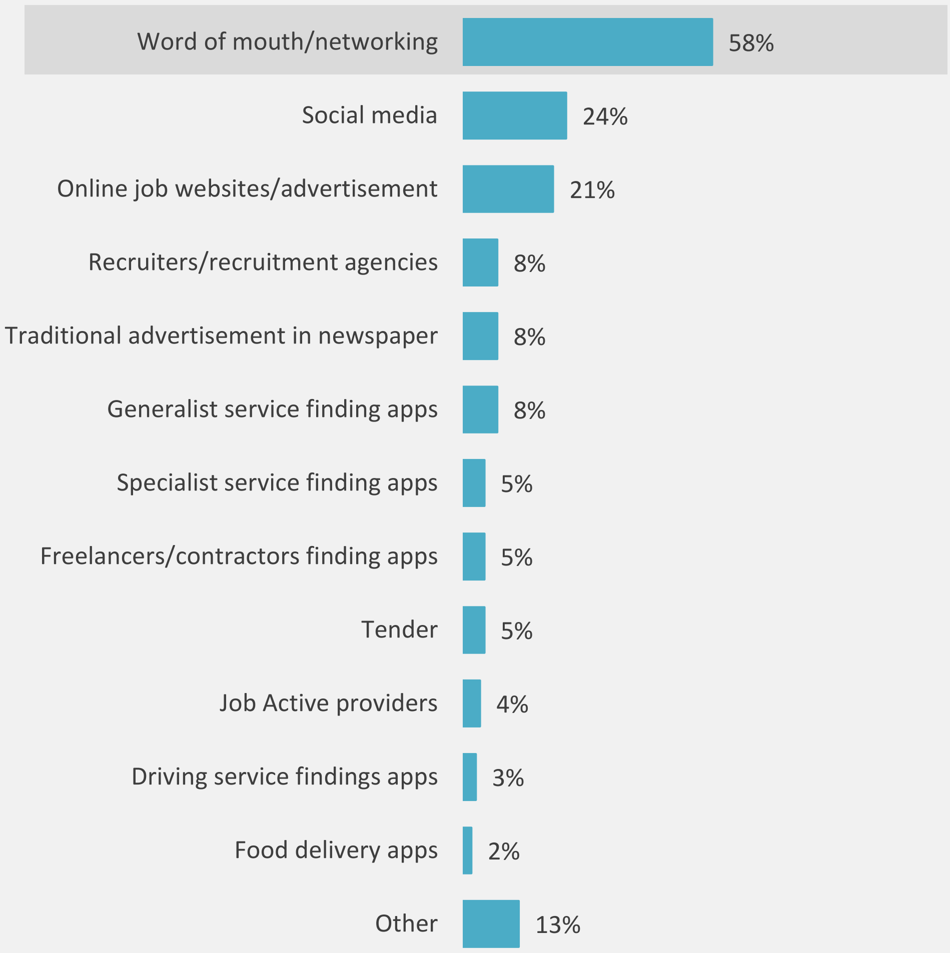
Alternative Workers surveyed reported using various sources for their work, the most common being **word of mouth** followed by **social media, and online job websites**.

Within the qualitative research, **social media platforms** such as Instagram and Facebook were considered both marketing as well as job sourcing platforms.

"It's really just Airtasker, Facebook, and Facebook groups that I can pick up some work. In business type groups as well" Gold Coast, Gig Economy Worker

"I use Instagram and Facebook to both promote myself but also find work" Digital Nomad Worker

ALTERNATIVE WORKERS METHODS OF SOURCING WORK



Base: All Alternative Workers (n=266)
AW2. How do you usually find or source work?

REASON FOR ALTERNATIVE WORKING ARRANGEMENTS

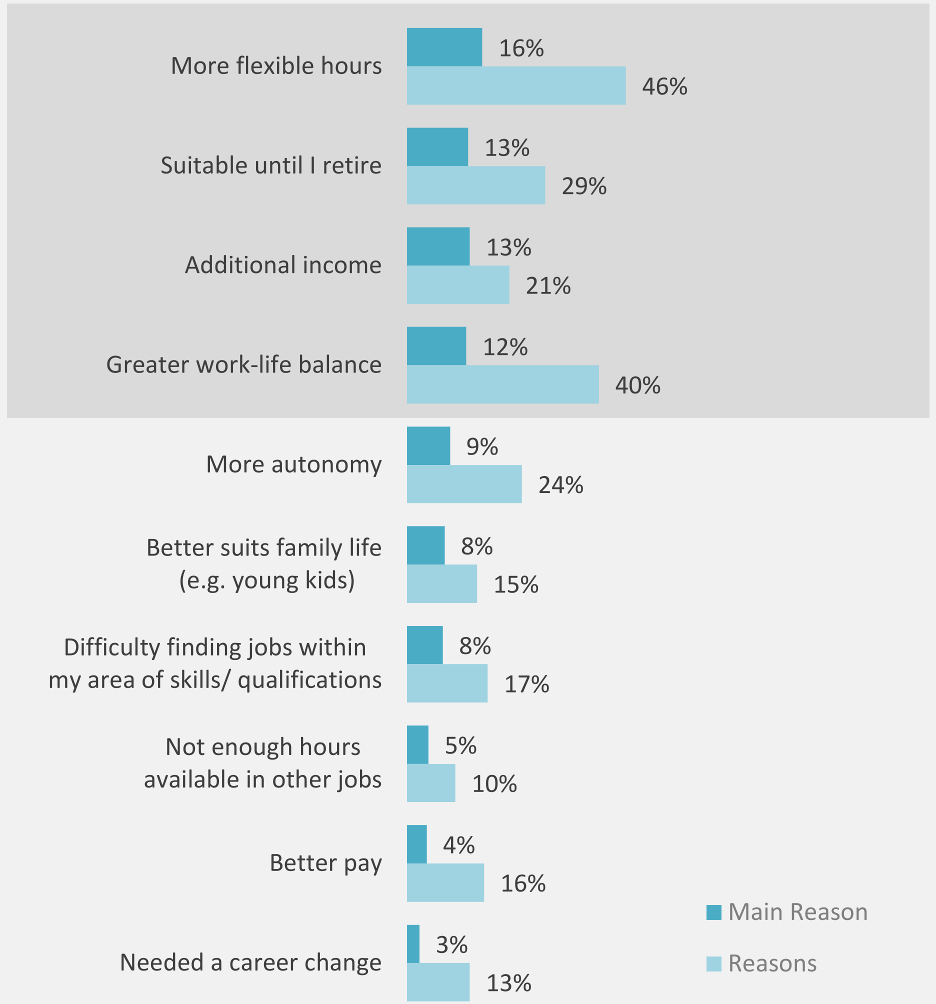
More flexible hours, additional income and a greater work-life balance are the main reasons Workers have an alternative work arrangement.

For mature aged Alternative Workers, the nature of the work arrangement suits them until they decide to stop working for good.

The ability to choose when and where they work was seen as a key benefit of alternative work within the qualitative research. This flexibility allows easier integration of personal needs, such as caring for children or other dependents and errands into one's day, rather than finding time to do these outside of standard 9am – 5pm work hours.

> *"The positives is the hours you work. You can work around things, you know, I've also got a child who's got a chronic health condition so this jobs helps me work around him"* Gold Coast, Gig Economy Worker
>
> *"To work freely is the main motivation of why I participate in this type of work"* Digital Nomad Worker

REASON FOR HAVING AN ALTERNATIVE WORK ARRANGEMENT



Base: Alternative Workers (n=266)
AW7a. What are the reasons you have this type of work arrangement?
AW7b. What is your MAIN reason for having this type of work arrangement?

REASON FOR ALTERNATIVE WORKING ARRANGEMENTS CONT'D

ADDITIONAL INCOME

Within the qualitative research a portion of Alternative Workers, particularly Gig Economy Workers, are undertaking their alternative work to **supplement their main income**. The motivations behind this varied from saving up for a specific financial goal (e.g. a trip to Europe) or simply paying off the mortgage faster.

> *"It's just an opportunity that we have. I use the income to pay extra on the mortgage. The goal is just to use the extra money while we've got the opportunity"* Brisbane, Gig Economy Worker

> *"He's got the ideal thing going, because he's using it as a top up of cash"* Gold Coast, Gig Economy Worker

> *"[Uber driving] so this is just literally propped me up to go to Europe to travel"* Brisbane, Gig Economy Worker

GREATER AUTONOMY

The **greater autonomy and control was also mentioned as key draw and benefit of alternative work**, both across Gig Economy Workers and Digital Nomad Workers.

Gig Economy Workers stated that the daily control of when and where they work in their work **makes them feel like they're their own boss.**

> *"In a way, I work for Uber but I'm technically my own boss"* Gold Coast, Gig Economy Worker

> *"I think it's flexibility, and it's freedom of choice. You can do it when you want"* Gold Coast, Gig Economy Worker

Digital Nomad Workers' sense of autonomy and control is also contributed to by the flexibility and greater work-life balance of their work, often a result of primarily being a sole traders and the independent nature of their work.

> *"The control and autonomy you have over your work is a huge benefit"* Digital Nomad Worker

CHALLENGES OF ALTERNATIVE WORKING ARRANGEMENTS CONT'D

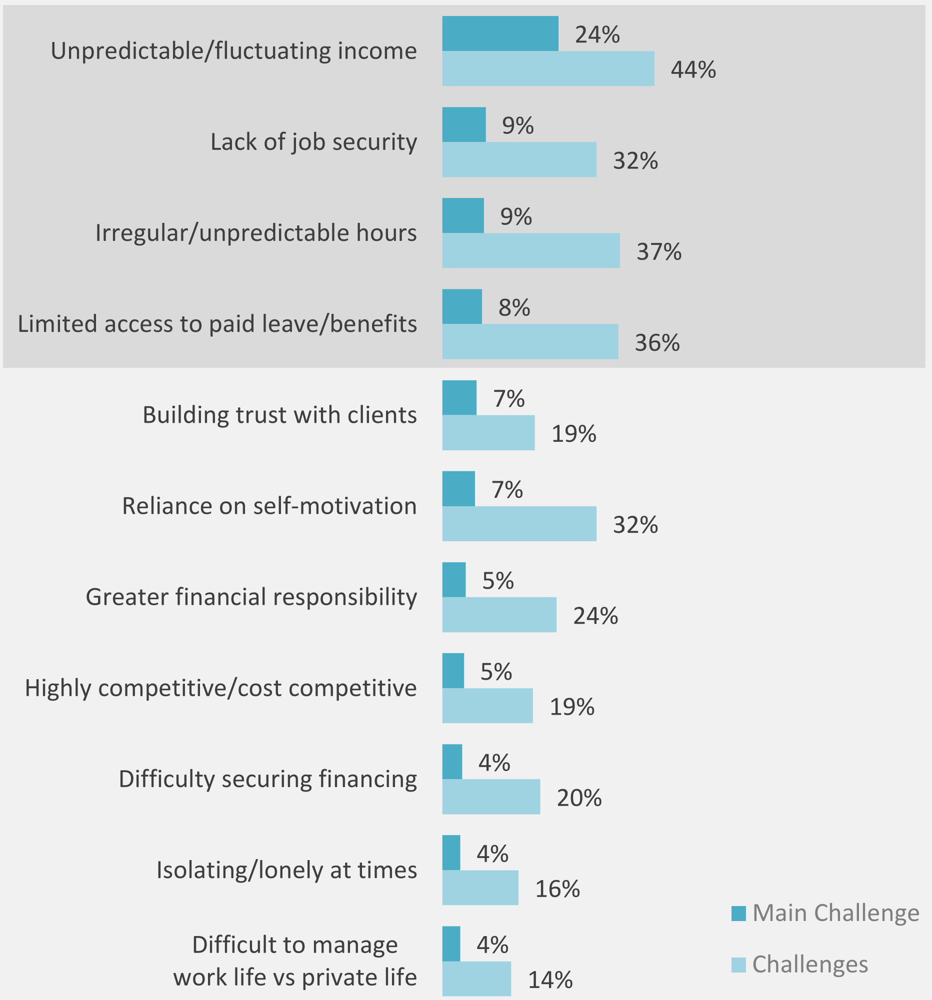
The primary challenge of having an alternative working arrangement is mainly due to its **instability**. Sub-challenges include having an **unpredictable or fluctuating income and work hours**, as well as having less job security and paid benefits.

Unpredictable work hours and income were the key counterpoints Alternative Workers expressed within the qualitative research to the flexibility they enjoyed from their working arrangements.

"They [client] say 'oh this is great' and then I'm like 'oh great I'll complete the task' and they might not release payment. It's very hard to chase down my money" Gold Coast, Gig Economy Worker

"I work from project to project and rely on contracts with my clients that can be terminated with little notice. That can impact levels of anxiety if a job is not going smoothly and you're not sure if a contract will be renewed and you won't have more work/income in 2 weeks" Digital Nomad Worker

CHALLENGES WITH HAVING AN ALTERNATIVE ARRANGEMENT



Base: Alternative Workers (n=266)
AW8a. What are some of the challenges with this type of work arrangement?
AW8b. What is the MAIN challenge with this type of work arrangement?

CHALLENGES OF ALTERNATIVE WORKING ARRANGEMENTS CONT'D

SMALL BUSINESS SKILLS

The unpredictability of their work and income further exacerbates the small business challenges Alternative Workers experience of needing to master and **balance generalist business skills** (finances, marketing, administration) **as well as their specialist skills**. This is especially in regard to income and finance management due to the unpredictability of their revenue streams.

> *"How to market yourself as a freelancer, as an entrepreneur, as someone who works for themselves. Learning how to do that properly, and then yeah business skills"* Brisbane, Gig Economy Worker

The **lack of leave and personal benefits** within their job also adds a further level of complexity for Alternative Workers as they must financially plan for personal care leave (illness, parental, bereavement).

> *"Maybe with budgeting. Out of every paycheck put this much away for tax. Put this much away for saving for when you don't have work"* Brisbane, Gig Economy Worker

PERSONAL WELLBEING

Other key challenges experienced by Alternative Workers centred around their personal wellbeing. Many Alternative Workers expressed within the qualitative research that the **unpredictability of their working arrangements lead to anxiety about managing workflow, income and expenses**.

> *"There are also periods when I don't have enough work and therefore don't receive regular pay, making things a bit more stressful financially"* Digital Nomad Worker

Other challenges of Alternative Worker wellbeing centred around **managing their work / life balance**, due to their non-traditional working hours and lacking a common 9am – 5pm work structure.

> *"Sometimes work spills into my private time as I work from home and can't just leave it all "at the office"*
> Digital Nomad Worker

As the majority of Alternative Workers work independently, it was commonly mentioned within the qualitative research how their work can lead to **feelings of loneliness and isolation** which can be difficult to manage.

> *"The ability to find locations outside my home so I can see other human beings is very important"*
> Digital Nomad Worker

CHALLENGES OF ALTERNATIVE WORKING ARRANGEMENTS CONT'D

EMERGING MARKET

Many Alternative Workers identified the **increasing competitiveness of online sourcing platforms and general task-based work** to be a key challenge they were facing.

With more Alternative Workers entering the market, this was driving up cost competition, with many mentioning having to drop prices to remain competitive, adding more financial pressure to an already stressful financial situation, especially when competing with overseas Alternative Workers.

This was **leading some Alternative Workers to stay away from these work sourcing platforms due to their overly competitive and price competitive nature**.

> *"As competition grows in the industry, both photography and yoga, it's harder to find regular work. People can now pick up a camera and become freelancers without the need to do courses or study, which also means they can charge less"* Digital Nomad Worker

Another aspect of competition within the Alternative Worker market was the **constantly growing number of work sourcing platforms and keeping up with them**.

NOT FITTING THE SYSTEM

Many Alternative Workers within the qualitative research mentioned **difficulty accessing bank loans**, (such as housing, car loans or business equipment loans) and even getting rental approval due to their 'non-traditional' form of work not matching work expectations and loan requirements.

> *"Because this kind of work is still considered unusual, it can also impact our ability to get a house mortgage or commit to long-term goals"* Digital Nomad Worker

> *"I had a bit of trouble applying for rental properties because I can't really prove what my income is"* Brisbane, Gig Economy Worker

Gaining access and support to government services, such as Newstart Allowance when work was unsustainably slow or impacted by illness, due to the services not being designed to expect or accommodate Alternative Working arrangements.

> *"I spent three days talking to Centrelink about how I report a task? This money goes here, this money goes there. Which part do I report as my own?* Brisbane, Gig Economy Worker

CHALLENGES OF ALTERNATIVE WORKING ARRANGEMENTS CONT'D

REVIEW SYSTEMS

While reviews are a common and often necessary feature within the "Gig Economy", **many Gig Economy Workers within the qualitative research mentioned how seriously a bad review can impact business**, especially when they can't be challenged by the organisation.

> *"Sometimes I get a bad review at the end of the day, no matter how hard I try. Airtasker doesn't really look out for your ability to be able to fight for your reputation on there"* Gold Coast, Gig Economy Worker

> *"It feeds back to the reviews. So much of that actually is hinging on the relationship that you've built during that very small period of time you've got with them. It certainly effects your business"* Brisbane, Gig Economy Worker

> *"That's what can kill all contract Workers, all the Airtaskers. Even Uber drivers say one bad review, and can crash the system. Technically the review system is biased. One kills the many hundreds of good ones you've got"* Brisbane, Gig Economy Worker

SEASONALITY

Many Alternative Workers within the qualitative research mentioned a level of **seasonality to their work, making income more unreliable and financial planning very difficult**.

> *"What I usually do is work for seven days, for nine months, because you can expect at least three months of slower period. So, to actually keep your funds ready for those three months"* Brisbane, Gig Economy Worker

> *"The amount of work can fluctuate a lot depending on the time of year or what is happening with the business"* Digital Nomad Worker

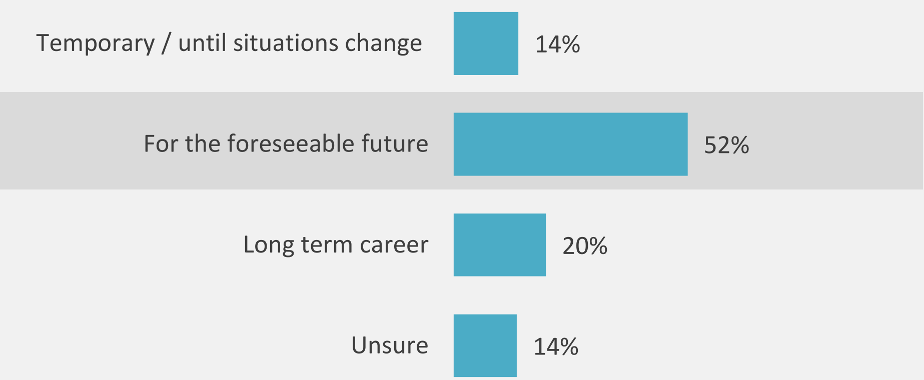
EXPECTED TENURE AS AN ALTERNATIVE WORKER

Half (52%) of Alternative Workers surveyed expect to continue with their alternative working arrangement for the foreseeable future. Only one-fifth consider their alternative working arrangement as a long term career.

In the qualitative research, **many Alternative Workers struggled to envisage how long they would continue in their current working arrangement**. This was due to their motivations being highly dependent on a desired lifestyle (to be around for the kids, to facilitate work and travel) or to earn additional income. Therefore the tenure of their working arrangement is dependent on lifestyle preferences which are likely to change as time passes.

> *"I see a mix of attitudes among other people [how long they will engage with alternative work], often depending on other life circumstances (if they have a partner, if they own a home, how old their parents are, if they are thinking of having kids, etc.). I think it changes over time with life events and milestones"* Digital Nomad Worker

How long do you think you will work as an Alternative Worker?



Base: All Alternative Workers (n=266)
AW9. How long do you think you will work in this type of alternative work arrangement?

EXPECTED TENURE AS AN ALTERNATIVE WORKER CONT'D

In the qualitative research, while Alternative Workers often struggled to pin point how long they would be working as an Alternative Worker their motivations for participating in alternative work often reflected and suggested a general time period for their participation. As the motivations for participating in alternative work are quite varied so too were the suggested time periods, spanning short term 'interim' time periods to 'the foreseeable future' as well as long term career paths.

TIME PERIODS			
IN THE INTERIM	**MEANS TO AN END**	**FOR THE FORESEEABLE FUTURE**	**CAREER**
MOTIVATIONS			
In-between jobs	**While studying or re-training** **To reach a financial goal**	**Better suited for lifestyle (travel, caring roles)** **Relatively easy additional income**	**Career path**
"Yeah, I think of this more of a temporary solution. You couldn't do it as a career because you'd just lose too much money while you're here" Brisbane, Gig Economy Worker *"It's a lot of hours. For the pay. Some days you could be getting less than minimum wage"* Gold Coast, Gig Economy Worker	*"Like I was just doing this while I did uni, but I also found there's obviously no career progression. Like, it's always going to be the same thing"* Brisbane, Gig Economy Worker	*"Mine's like change of life experience now. I want to get out of that office 9-5 work and look for work I can fit around my family, school hours and holidays"* Gold Coast, Gig Economy Worker *"I think in the future I will be looking for a more stable, secure 9-5 job. I enjoy this job at the moment because I am young and traveling but I can't see my job progressing or growing to be a bigger position"* Digital Nomad Worker	*"Well its something I've just started in the last few months, but I'm hoping to build it to a point where I can leave my full time role"* Brisbane, Gig Economy Worker *"Yeah, this is my career. I've got a couple little sidelines. I've got a website that I've been building"* Brisbane, Gig Economy Worker

SUB-CATEGORISING ALTERNATIVE WORKERS

Worker Perspective

CHALLENGES SUB-CATEGORISING ALTERNATIVE WORKERS

Respondents classified as Alternative Workers, completed a specialised section of the survey about their alternative working arrangements. These questions were designed to allow for further categorisation, including identifying Gig Economy Workers and Digital Nomad Workers. The characteristics for segmenting Alternative Workers were designed in line with the characteristics of Gig Economy Workers and Digital Nomad Workers proposed in the earlier qualitative stage (phase 1) of this research and the literature review.

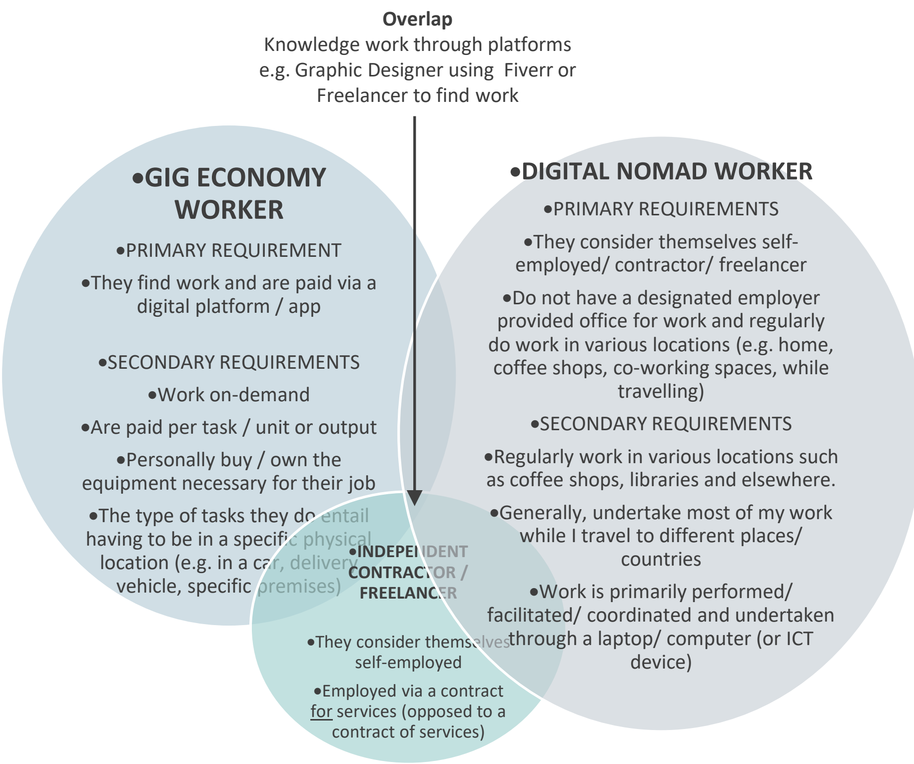
From the outset and during the qualitative research, an **overlap within the definitions** of Gig Economy Workers, Digital Nomad Workers and Independent Contractors/Freelancers was identified. Within the quantitative phase this overlap created challenges in identifying sub-categories of Alternative Workers.

A second issue with the proposed characteristics was identified when examining the data from the quantitative (phase 2) research. It became evident some respondents had **different interpretations of the characteristics** than the way they were intended.

Both of these issues resulted in a high level of crossover between the various characteristics. This meant that these characteristics could not be used as the primary requirement to segment Alternative Workers into sub-categories, including Gig Economy Workers and Digital Nomad Workers.

The problematic characteristics include:

- Working on-demand
- Paid per task
- Working on a contract basis
- Personally buy/own necessary equipment



PROBLEMATIC CHARACTERISTIC: ON DEMAND

The characteristic "*work is not ongoing and is performed on demand"* was proposed as a secondary requirement used to define Gig Economy Workers.

It was suggested that the 'on demand' characteristic could be used as the opposite of 'on a contract basis', which would assist in separating Gig Economy Workers and Digital Nomad Workers. However, it is evident when looking at the data that these characteristics are not counterpoints but instead can go hand in hand, depending on how they are interpreted.

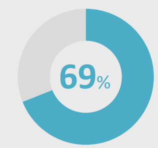
It is possible that the term 'on demand' could be interpreted several ways, such as:

- Providing a short-term job when needed, such as driving a person to a specific destination.
- Workers who are on a contract may consider their work 'on demand' regardless of the length of the contract.

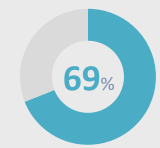
If their work is not ongoing with the same employer, then Workers may consider themselves 'on demand'. This could apply to almost all Alternative Workers.

Work is not ongoing and is performed on demand

Gig Economy Worker



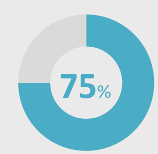
Other Alternative Worker



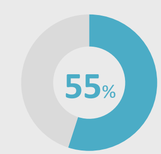
69% of Gig Economy Workers and 69% of Other Alternative Workers identifying their work as being performed 'on demand'

Work is not ongoing and is performed on demand

I am paid per task



I work on a contract basis



Of those who identify their work as 'on demand', 75% also identifying their work as 'paid per task' and 55% identify their work as on a 'contract basis'.

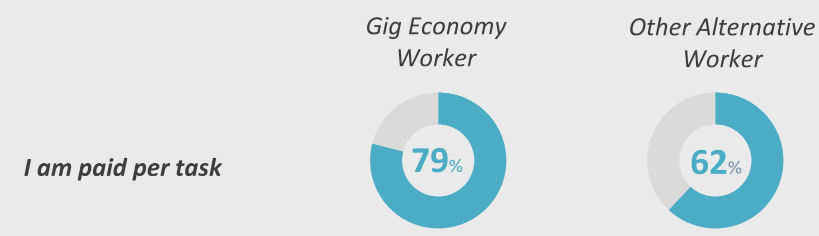
PROBLEMATIC CHARACTERISTIC: PAID PER TASK

The characteristic *"I am paid per task"* was proposed as a secondary requirement used to define Gig Economy Workers.

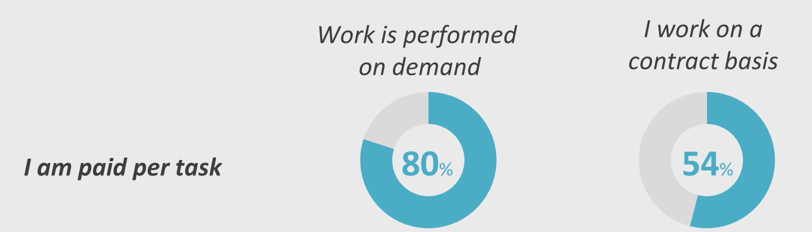
Again however, high levels of crossover amongst Alternative Worker are present. This crossover is possibly due to people having a different interpretation of 'task'.

A 'task' could be interpreted as anything from driving someone to their destination, to completing a 5-month contract undertaking an environmental impact assessment for a building.

This is possibly a reason for many people who said they work on a contract basis also stating that they are paid per task.



79% of Gig Economy Workers and 62% of Other Alternative Workers identifying their work as being 'paid per task'.



Of those who identify as being 'paid per task', 80% also identified as performing work on demand and 54% also identified as working on a contract basis.

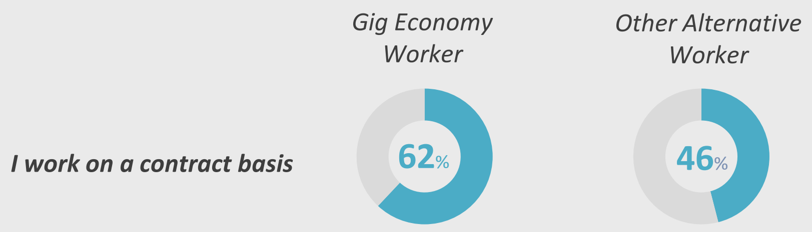
PROBLEMATIC CHARACTERISTIC: ON A CONTRACT

The characteristic "*I work on a contract basis*" was proposed as a primary requirement used to define Gig Economy Workers.

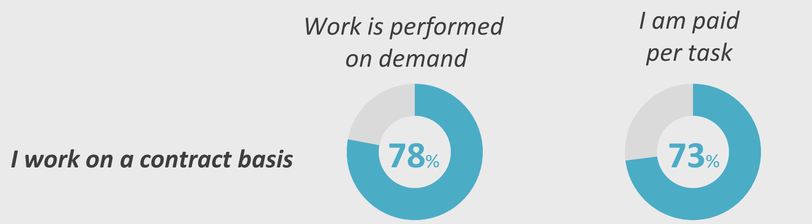
Once again, high levels of crossover is present, possibly also the result of people having a different interpretation of 'on contract basis'.

The possible point of confusion is that many employment scenarios involve a contract or terms and conditions on some level (e.g. Uber drivers need to sign a contract and terms and conditions when they start working as a driver).

Therefore all Alternative Workers and even Standard Workers could perceive themselves as working on a contract basis.



62% of Gig Economy Workers and 45% of Other Alternative Workers considering their work as 'contract' work.



Of those who are self-identified 'Contract Workers', 78% also identifying as working 'on-demand', and 73% identify as being 'paid per task'.

PROBLEMATIC CHARACTERISTIC: PERSONAL OWNERSHIP OF EQUIPMENT

The characteristic *"I personally buy/own the equipment necessary for my job"* was proposed as a secondary requirement used to define Gig Economy Workers.

Looking at the data, this characteristic is not especially unique to Alternative Workers with 1 in 5 Standard Workers also identifying with this characteristic.

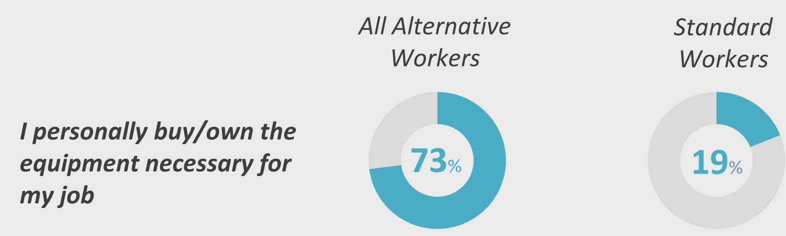
The data also suggests that this characteristic is not unique to a particular sub-segment of Alternative Workers.

Due to the crossover, this characteristic was not utilised in the sub-categorisation of Alternative Workers.

LEARNINGS

The crossover of defining factors among Alternative Workers are important findings in themselves. It suggests that the current defining characteristics used for Gig Economy Workers and Digital Nomad Workers are not unique to each group and that these characteristics require further distilling.

For example, it may be beneficial to further define the length or duration (days/weeks/months) and scale of 'task-based work', 'on demand work' and 'contract basis work' for these types of Alternative Workers.



19% of Standard Workers also identifying with this characteristic.

87% of Gig Economy Workers and 75% of other Alternative Workers identify with this characteristic.

FURTHER CHALLENGES WITH SUB-CATEGORISING DIGITAL NOMAD WORKERS

The characteristic *"do not have a designated employer provided office for work and regularly do work in various locations (e.g. home, coffee shops, co-working spaces, while travelling)* was proposed as a primary requirement used to define Digital Nomad Workers.

This requirement is problematic in a number of ways. Firstly, the nomadic nature of those Workers addressed within this definition is very broad, spanning those who work in local coffee shops and libraries to those who work while on personal travel interstate or overseas.

Secondly, from the qualitative research, it was learnt that despite their work enabling a nomadic lifestyle, many Digital Nomad Workers desire routine and stability when it comes to their work. This leads some Digital Nomad Workers to shift away from nomadic behaviour of traveling and moving around a lot, to creating 'home offices' and work routines.

Some Digital Nomad Workers stated the ability to do their job from anywhere and while they travel, while appealing at first, developed into a challenge and frustration, as it makes it difficult to balance their work and personal life.

> *"Now that I am back home and travelling less frequently, I find the cons to be outweighing the pros for me personally"*
> *Digital Nomad Worker*

> *"I normally work at home but occasionally to break things up I will go to a cafe or library - anywhere with an internet connection"*
> *Digital Nomad Worker*

> *"I had previously had a separate room as a home office space, though if I didn't have any evening plans I'd just keep working until bed time. It was difficult to switch off. It also became quite isolating - there was no one to bounce ideas off, chat to over lunch etc. And alternately, home distractions can creep into the workday - dishes, washing, elaborate cooked lunches!"*
> *Digital Nomad Worker*

Based on these findings two sub-categorisations of Alternative Workers were identified, the more traditional Digital Nomad Worker who are digitally enabled and nomadic, and a more stationary sub-group (mostly working from a home office) who are still digitally enabled, Digital and Stationary Workers.

FURTHER CHALLENGES WITH SUB-CATEGORISING GIG ECONOMY WORKERS

Based on the problematic identification of 'task based' and 'on-demand' Workers within the quantitative research, it was decided that the most reliable method of identifying Gig Economy Workers was whether they sourced their work through traditional Gig Economy job sourcing platforms and apps (*specialist service finding apps (e.g. Hipages, Autoguru); Generalist service finding apps (e.g. Airtasker, Oneflare); Driving service finding apps (e.g. Uber, Ola, GoCatch); Food delivery apps (e.g. Foodora, Deliveroo, UberEATS).*

Within the qualitative research it was identified that Gig Economy Workers do not solely source their work and payments via digital platforms and apps. Some Gig Economy Workers utilise these platforms to source initial jobs and then once a relationship has been established they try to take these jobs offline to maximise their savings by avoiding platform costs.

> *"I've already got them lined up. If you get the right person. And you know the right person once you've done the work. You've spent some time driving, chatting while taking them to the airport. I've got regulars Sunday morning, Monday morning, Friday night, and Saturday morning pick-ups"* Brisbane, Gig Economy Worker

It was also noted that there are many business models that these job/task sourcing platforms utilise, with not all mandating payment via the app or platform, allowing other methods of payment as well.

Payment via these job sourcing platforms and apps was not used as a key defining characteristic due to the variances in payment methods across platforms identified within the qualitative research.

NOTE: While it's understood from the qualitative findings that not all Gig Economy Workers source their work via these typical Gig Economy platforms, unfortunately Enhance Research are unable to identify these Workers within the quantitative data due to the cross over in 'on demand' and 'task based work' results explained previously.

PROPOSED SUB-CATEGORISING ALTERNATIVE WORKERS

Due to the challenges outlined, the following characteristics were not used as primary factors in sub-categorising Alternative Workers:

- *Work is performed on demand*
- *I am paid per task*
- *I work on a contract basis*

Instead, they were taken into consideration as secondary and tertiary factors.

Using the available data, six sub-categories of Alternative Workers were identified. While these six sub-categories may not entirely capture Gig Economy Workers and Digital Nomad Workers, they do identify distinctive sub-groups of Alternative Workers.

Sub-Categorisation of Alternative Workers					
Gig Economy Workers	Digital Nomad Workers	Digital & Stationary Workers	Stationary Non-Digital Workers	Roamers	Non-categorised Alternative Workers
Brief descriptor of Sub-Category Alternative Worker traits					
Source their work via 'traditional' Gig Economy platforms and apps (largely self employed and task-based on on-demand Workers)	Self employed Workers who primarily performed on a computer and have no permanent office location (work while they travel or conducted their work in multiple locations)	Self employed Workers who primarily perform their work on a computer however, conduct their work from a single location (e.g. home office or co-working space)	Self employed Workers whose work is not primarily performed on a computer and conduct their work from a single location (e.g home office or co-working space)	Self employed Workers whose work is not primarily performed on a computer and either requires them to be in a vehicle or at specific locations	These Workers have a mixture of characteristics however, do not align with previous sub-categorisations and lack consistent characteristics large enough to be unique identifiers

These unique sub-categorisations beyond 'Gig Economy Workers' and 'Digital Nomad Workers' and large proportion of non-categorisation Alternative Workers suggests that the Alternative Worker landscape is more complicated and diverse then previous anticipated.

The following section of the report examines these six sub-categories of Alternative Workers.

Gig Economy Workers

This sub-category are primarily identified by how they source their work. All of these Workers use at least one of the following Gig Economy Apps: Specialist service finding apps (e.g. Hipages, Autoguru); Generalist service finding apps (e.g. Airtasker, Oneflare); Driving service finding apps (e.g. Uber, Ola, GoCatch); Food delivery apps (e.g. Foodora, Deliveroo, UberEATS).

15% % OF ALTERNATIVE WORKERS SURVEYED

AGE & GENDER

56% (male)

44% (female)

Under 25	8%
25 to 34	31% ↑
35 to 44	21%
45 to 54	15%
55 to 64	13%
65+	13%

NUMBER & TYPE OF JOBS

54% Have one job and it is an alternative job

33% ↑ Have a standard main job and a second alternative job

10% Have two alternative jobs

TENURE

Less than 3 months	18%
3 - 6 months	8%
7 - 12 months	13%
1 to 2 years	33% ↑
3 to 5 years	8%
6 to 10 years	18%
More than 10 years	3% ↓

KIDS & SELF-EMPLOYMENT STATUS

46% have children at home

90% describe themselves as self employed

WORK HOURS

Full-time	33%
Part-time	26%
On a casual basis	15%
On demand/ad hoc	26%

22hr Average hours per week

PERSONAL INCOME

Under $40k	24%
$40k to $80k	39%
$80k to $120k	26%
$120k +	11%

INDUSTRY

Administrative & Support Services	35%
Financial & Real Estate Services	20%
Construction	15%
Health Care & Social Assistance	10%
Professional & Scientific Services	10%
Retail	5%
Manufacturing	5%

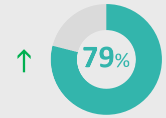
Base: Gig Economy Workers (n=39)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

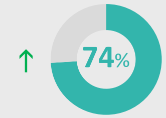
Gig Economy Workers

These Alternative Workers are the most likely to have undertaken training or education in the past 3 years and the most likely to undertake training or education in the near future. For these Workers, alternative arrangements are more temporary and less of a long term career. These Workers are also typically younger than other Alternative Workers and have only been in this type of work arrangement for 2 years or less.

PAST & FUTURE TRAINING

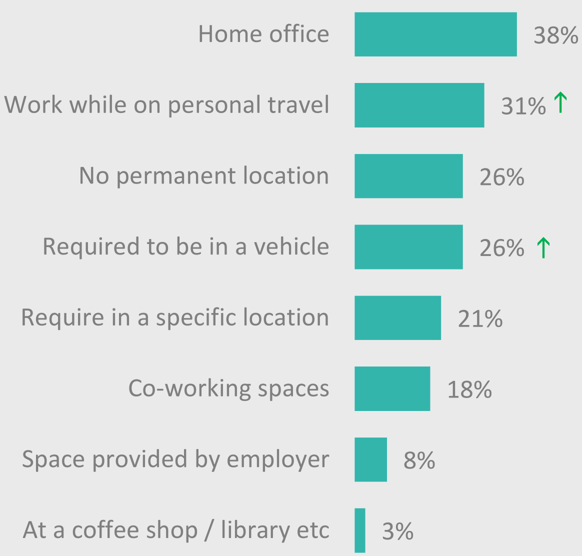


Have undertaken training or education In the past 3 years

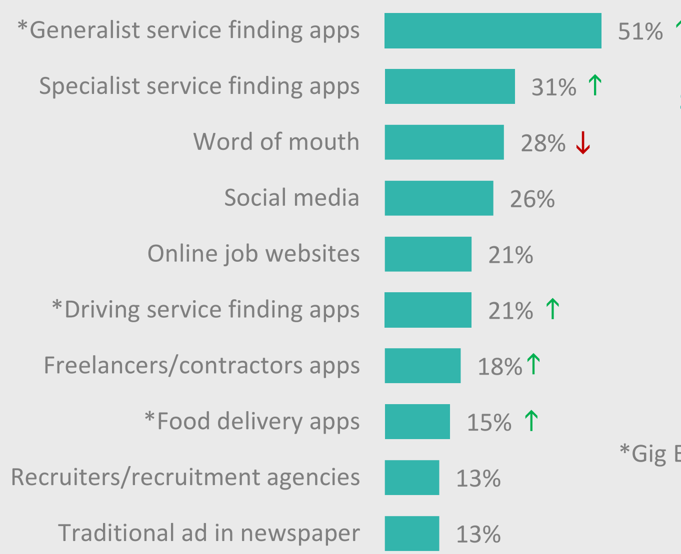


Plan to undertake training or education In the next 3 years

WORK LOCATION

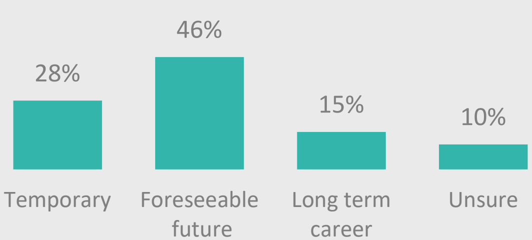


SOURCING WORK



*Gig Economy Apps

FUTURE OUTLOOK



MOTIVES

64% More flexible hours

33% Suitable until I retire

33% More autonomy

CHALLENGES

51% Unpredictable/ fluctuating income

46% Irregular and unpredictable working hours

41% Reliance on self-motivation

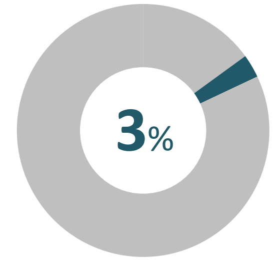
Base: Gig Economy Workers (n=39)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

Digital Nomad Workers

This sub-category is identified by being self-employed, primarily performing their work on a computer, not using Gig Economy Apps to source their work and having either a non-permanent office location or work while they are on personal travel.

Due to the limited number of Digital Nomad Workers in the quantitative research a description of this sub-group has been provided based on the qualitative research.



% OF ALTERNATIVE WORKERS SURVEYED

MOTIVATIONS

To support caring roles through flexible hours and workplaces

To support a desired lifestyle (e.g. travel, non-9am-5pm)

WHEN/WHERE THEY WORK

Personal travel

Work related travel

Cafes, libraries etc
Lack of a workspace

BENEFITS

- Greater autonomy with work
- Flexible working hours
- The ability to work and travel
- Flexibility of work aligns well with creative processes

SKILLS

Ambition and drive

All round small business skills

Industry knowledge & connections

SOURCING WORK

Recruiters

Social media channels

Specialist apps were trialled but are not the preferred method

SHORT TERM vs LONG TERM

Key motivators for this working arrangements centre around a providing a certain lifestyle.

Therefore, many Digital Nomad Workers have a 'for the **foreseeable future**' mentally to their working arrangement.

CHALLENGES

- Developing small business skills
- Difficulty in mainstream services not accommodating 'alternative work' (e.g. financial services & loans)
- Increasingly competitive and price competitive market
- Difficulty managing work-life balance due to always being 'on' and non-typical working hours
- Loneliness/ isolation

Base: Digital Nomad Workers: Online Forum (n=10)

Digital & Stationary

This sub-category is identified by being self-employed, primarily performing their work on a computer, not using Gig Economy Apps to source their work and having a single work location.

While these Alternative Workers possess many of the characteristics of Digital Nomad Workers (all identifying as self-employed and digitally enabled) they lack the nomadic lifestyle, instead choosing a single location to work, predominantly a home office.

19% % OF ALTERNATIVE WORKERS SURVEYED

AGE & GENDER

45% (male)

55% (female)

Under 25	1%
25 to 34	8%
35 to 44	18%
45 to 54	22%
55 to 64	27%
65+	25%

NUMBER & TYPE OF JOBS

82% Have one job and it is an alternative job

10% Have two alternative jobs

TENURE

Less than 3 months	10%
3 - 6 months	1%
7 - 12 months	10%
1 to 2 years	12%
3 to 5 years	20%
6 to 10 years	10%
More than 10 years	33%

KIDS & SELF-EMPLOYMENT STATUS

37% have children at home

100% describe themselves as self employed

WORK HOURS

Full-time	45%
Part-time	25%
On a casual basis	12%
On demand/ad hoc	18%

29hr Average hours per week

PERSONAL INCOME

Under $40k	35%
$40k to $80k	26%
$80k to $120k	15%
$120k +	24% ↑

INDUSTRY

Retail	26%
Professional & Scientific Services	24%
Financial & Real Estate Services	16%
Education & Training	8%
Health Care & Social Assistance	8%
Administrative & Support Services	5%
Manufacturing	5%
Construction	5%

Base: Digital and Stationary Workers (n=51)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

Digital & Stationary

In contrast to Gig Economy Workers, these Alternative Workers are older, have had this type of arrangement for a longer period of time and see it as a more long term proposition. The personal income of these Workers is more likely to be higher than other Alternative Workers.

PAST & FUTURE TRAINING

49% Have undertaken training or education In the past 3 years

47% Plan to undertake training or education In the next 3 years

WORK LOCATION

Home office	96% ↑
Co-working spaces	2%
At a coffee shop / library etc	2%

SOURCING WORK

Word of mouth	53%
Social media	22%
Online job websites	20%
Job Active providers	8%
Tender	8%
Traditional ad in newspaper	6%
Recruiters/recruitment agencies	4%
Freelancers/contractors apps	2%

FUTURE OUTLOOK

Temporary	Foreseeable future	Long term career	Unsure
10%	51%	29%	10%

MOTIVES

53% Greater work-life balance

49% More flexible hours

35% Suitable until I retire

CHALLENGES

45% Reliance on self-motivation

43% Unpredictable/ fluctuating income

33% Limited or no access to paid leave and benefits

Base: Digital and Stationary Workers (n=51)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

ENHANCE research

Stationary Non-Digital

This sub-category is identified by being self-employed, not using Gig Economy Apps to source their work, having a single work location and not primarily performing their work on a computer.

These Workers are very similar to Digital Stationary Workers in that they predominantly work from a single non-employer provided workspace (again principally a home office). However, where this segment differs is that their work is not primarily performed on a computer.

12% % OF ALTERNATIVE WORKERS SURVEYED

AGE & GENDER

41% (male)

59% (female)

Under 25	6%
25 to 34	1%
35 to 44	16%
45 to 54	31%
55 to 64	28%
65+	19%

NUMBER & TYPE OF JOBS

78% Have one job and it is an alternative job

16% Have two alternative jobs

TENURE

Less than 3 months	6%
3 - 6 months	6%
7 - 12 months	6%
1 to 2 years	9%
3 to 5 years	13%
6 to 10 years	16%
More than 10 years	25%

TYPE OF WORK & SELF-EMPLOYMENT STATUS

22% ↑ work in sales

100% describe themselves as self employed

WORK HOURS

Full-time	41%
Part-time	13%
On a casual basis	13%
On demand / ad hoc	34%

25hr Average hours per week

PERSONAL INCOME

Under $40k	34%
$40k to $80k	34%
$80k to $120k	10%
$120k +	17%

INDUSTRY

Retail	25%
Health Care & Social Assistance	21%
Professional & Scientific Services	17%
Financial & Real Estate Services	13%
Manufacturing	8%
Agriculture, Forestry & Fishing & Mining	8%
Education & Training	4%
Administrative & Support Services	4%

Base: Stationary Non-Digital Workers (n=32)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

Stationary Non-Digital

Again, in contrast to Gig Economy Workers, these Alternative Workers have had this type of arrangement for a longer period of time. Unlike Digital & Stationary Workers, these Workers have a lower personal income and are less inclined to see this as a long term career.

PAST & FUTURE TRAINING

53% Have undertaken training or education In the past 3 years

44% Plan to undertake training or education In the next 3 years

WORK LOCATION

Home office	84% ↑
Co-working spaces	13%
At a coffee shop / library etc	3%

SOURCING WORK

Word of mouth	59%
Social media	25%
Online job websites	19%
Traditional ad in a newspaper	9%
Job Active providers	6%
Tender	3%

FUTURE OUTLOOK

Temporary	Foreseeable future	Long term career	Unsure
13%	53%	19%	16%

MOTIVES

34% Greater work-life balance

34% More autonomy

28% Suitable until I retire

CHALLENGES

38% Unpredictable/ fluctuating income

38% Reliance on self-motivation

34% Lack of job security

Base: Stationary Non-Digital Workers (n=32)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

ENHANCE research

Roamers

This sub-category is identified by not using Gig Economy Apps to source their work and having to perform their work in a required specific location or in a vehicle.

These Alternative Workers are mostly self-employed and their work is primarily performed via other means than a computer. Similar to Digital Nomad Workers these Workers are nomadic, however their nomadic characteristics are a requirement of their work, rather than a lifestyle preference.

21% % OF ALTERNATIVE WORKERS SURVEYED

AGE & GENDER

51% (male)

49% (female)

Under 25	7%
25 to 34	7%
35 to 44	15%
45 to 54	20%
55 to 64	35%
65+	16%

NUMBER & TYPE OF JOBS

65% Have one job and it is an alternative job

11% Have a standard main job and a second alternative job

9% Have two alternative jobs

TENURE

Less than 3 months	9%
3 - 6 months	7%
7 - 12 months	13%
1 to 2 years	11%
3 to 5 years	20%
6 to 10 years	7%
More than 10 years	29%

TYPE OF WORK & SELF-EMPLOYMENT STATUS

42% ↑ are blue collar Workers

85% describe themselves as self employed

WORK HOURS

Full-time	24%
Part-time	18%
On a casual basis	25%
On demand / ad hoc	33%

24hr Average hours per week

PERSONAL INCOME

Under $40k	47%
$40k to $80k	43%
$80k to $120k	8%
$120k +	2%

INDUSTRY

Administrative & Support Services	26%
Education & Training	22%
Retail	15%
Health Care & Social Assistance	7%
Manufacturing	7%
Construction	7%
Agriculture, Forestry & Fishing & Mining	7%
Professional & Scientific Services	4%
Financial & Real Estate Services	4%

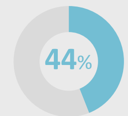
Base: Roamers (n=55)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

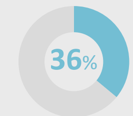
Roamers

Examples of these Workers include mobile hairdressers, driving instructors and personal carers who travellers to patients/clients locations.

PAST & FUTURE TRAINING

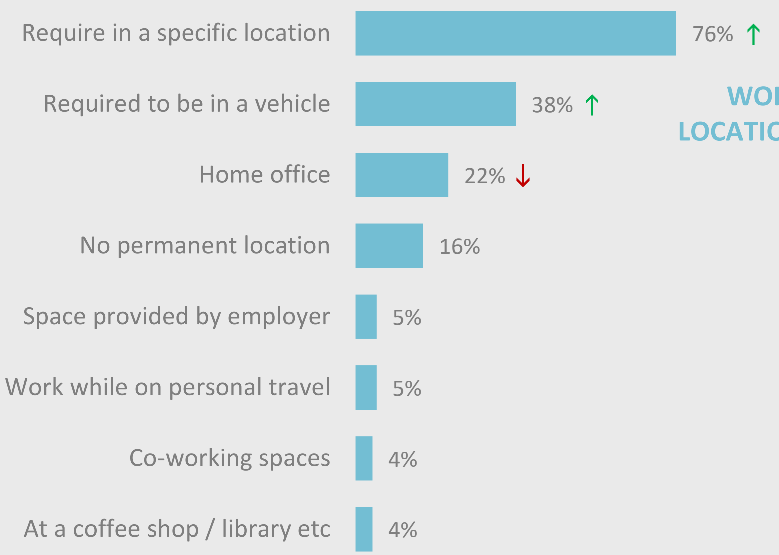


Have undertaken training or education In the past 3 years

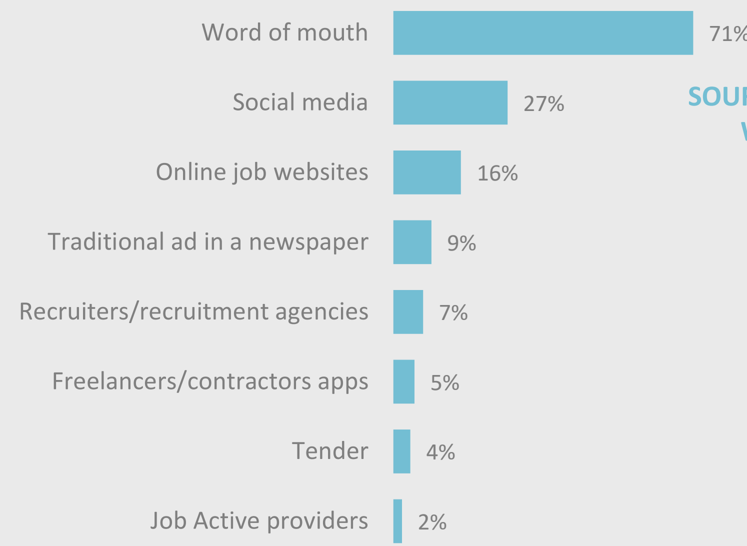


Plan to undertake training or education In the next 3 years

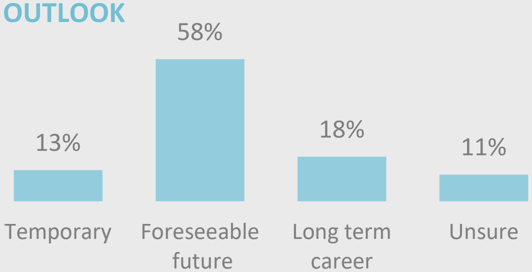
WORK LOCATION



SOURCING WORK



FUTURE OUTLOOK



MOTIVES

49% Greater work-life balance

42% More flexible hours

35% Suitable until I retire

CHALLENGES

55% Unpredictable/ fluctuating income

51% Limited or no access to paid leave and benefits

49% Irregular and unpredictable working hours

Base: Roamers (n=55)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

Non-Categorised Alternative Workers

This non-categorised sub-segment are those who do not source work via traditional Gig Economy digital platforms or apps, but do not neatly fall into any of the previous sub-segments of Alternative Workers.

30% % OF ALTERNATIVE WORKERS SURVEYED

AGE & GENDER

37% (male)

63% (female)

Under 25	4%
25 to 34	10%
35 to 44	21%
45 to 54	27%
55 to 64	25%
65+	14%

KIDS & SELF-EMPLOYMENT STATUS

21% have children at home

↓ **65%** describe themselves as self employed

NUMBER & TYPE OF JOBS

64% Have one job and it is an alternative job

10% Have a standard main job and a second alternative job

10% ↑ Have an alternative main job and a second standard job

TENURE

Tenure	%
Less than 3 months	4%
3 - 6 months	10%
7 - 12 months	6%
1 to 2 years	15%
3 to 5 years	21%
6 to 10 years	10%
More than 10 years	22%

WORK HOURS

Work hours	%
Full-time	28%
Part-time	25%
On a casual basis	31%
On demand / ad hoc	16%

24hr Average hours per week

PERSONAL INCOME

Under $40k	40%
$40k to $80k	27%
$80k to $120k	21%
$120k +	10%

INDUSTRY

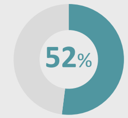
Industry	%
Administrative & Support Services	21%
Professional & Scientific Services	21%
Health Care & Social Assistance	19%
Retail	11%
Education & Training	11%
Construction	11%
Financial & Real Estate Services	4%

Base: Non-Categorised Alternative Workers (n=81)

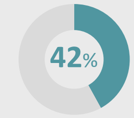
Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

Non-Categorised Alternative Workers

PAST & FUTURE TRAINING

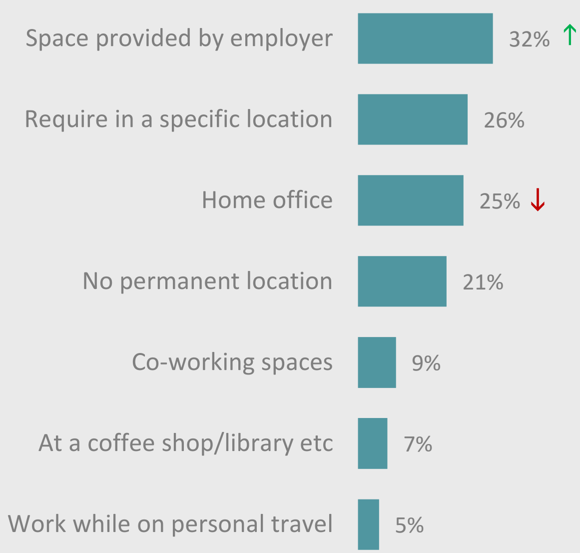


Have undertaken training or education In the past 3 years

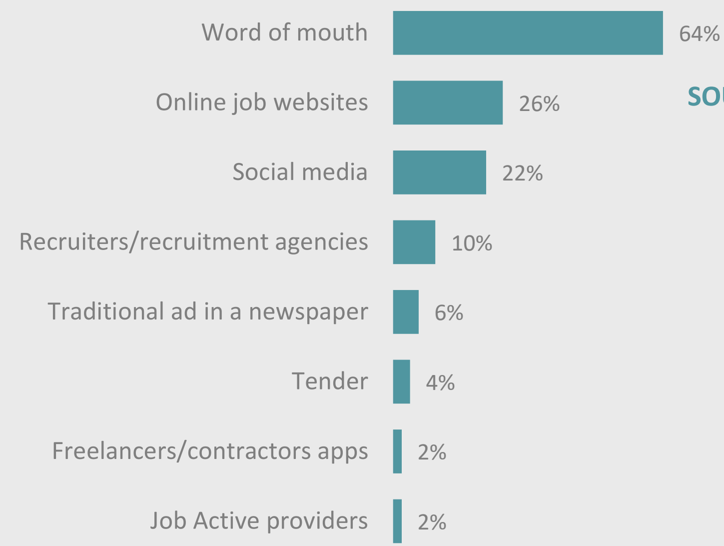


Plan to undertake training or education In the next 3 years

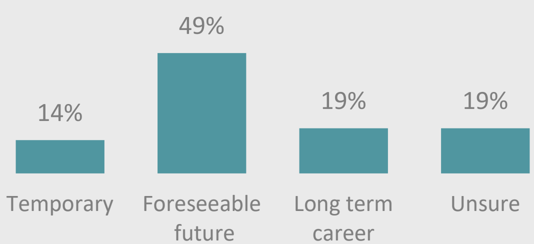
WORK LOCATION



SOURCING WORK



FUTURE OUTLOOK



MOTIVES

44% More flexible hours

33% Greater work-life balance

19% Suitable until I retire

CHALLENGES

36% Limited or no access to paid leave and benefits

33% Lack of job security

32% Unpredictable/ Fluctuating income

Base: Non-Categorised Alternative Workers (n=81)

Figures are significantly higher ↑ or lower ↓ than Alternative Workers overall

SKILLS & TRAINING

SKILLS & TRAINING
Summary of Findings

THE EXTENT & TYPES OF TRAINING UNDERTAKEN
Around two-thirds of Workers (60%) have undertaken formalised training or education for their current or future employment in the past 3 years.

Overall, **Workers surveyed appear to have a mindset that is focused on the present**. When it comes to the motivations for undertaking work related training or education, the **main drivers centre around short term benefits such as wanting to remain current and up to date, to gain skills for their current role and to meet compliance requirements**.

ORGANISATIONAL INVOLVEMENT
Employers primarily provide short timeframe training to employees, such as classes, workshops, events and conferences.

The **main barriers Employers face in providing training centre around costs**, both financial and in regards to organisational time.

One fifth of Employers fully fund training or education solely initiated by Workers. These findings **possibly suggest that Workers, rather than Employers are more likely to be the instigators of training with Employers playing a more financially supportive role**.

FUTURE TRAINING
Just under half of Workers (44%) plan to undertake significant work related training in the next three years.
Of the Employers that provide training, about half (55%) expect the amount of training provided to remain the same in the next 3 years and a third expect training amounts to increase.

MOST IMPORTANT SKILLS FOR THE FUTURE
Both Employers and Workers feel that communication skills will be the most important skills for Workers to have in the next 10 years. Skills seen to be of secondary importance are adaptive skills, self-management skills, digital skills, analytical skills and technical skills specific to an industry.

SPECIFIC INTERPRETATION FOR THIS SECTION
Within this section of the report, the types of training undertaken by both Standard Workers and Alternative Workers is explored.

SKILLS & TRAINING

Employer Perspective

TRAINING PROVIDED

The **most common forms of training provided by Employers are on the job training followed by in-house training on new technology/processes** and paid attendance to conferences, workshops etc.

Just under half of Employers surveyed provide training to support compliance.

Only 4% of Employers do not provide some type of training or training resources.

Employers placed great value on staff training throughout the qualitative research. All Employers were eager for their Workers to undertake whatever training was within the Employers' means.

Most Employers tended to expect any training beyond mandatory and compliance training to be initiated by the Worker themselves and supported by the Employer by whatever means it could.

> *"If you've got a massive team then you can't [give personalised training advice]. You don't have the time to be doing it for everyone, so very much individually based, or driven"* Brisbane, Large Employer

TRAINING AND TRAINING RESOURCES PROVIDED

Base: All Employers (n=502)
ST3. Does your organisation provide employees with any training or training resources?

TRAINING & RESOURCES PROVIDED

BY EMPLOYER SIZE

Large Employers surveyed are significantly more likely to provide Workers with most types of training.

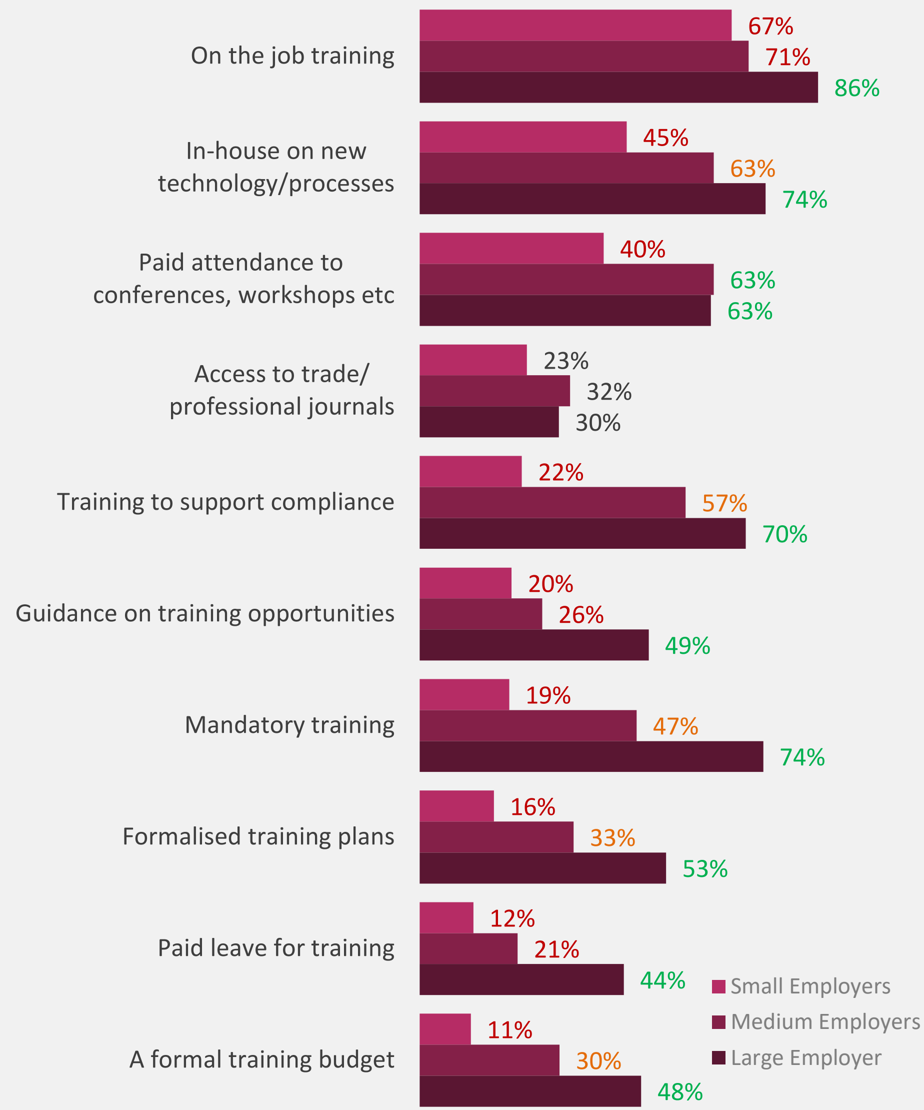
With access to more resources, it is understandable that large Employers are significantly more likely to provide mandatory training, compliance training, guidance on training opportunities, formalised training plans and budgets, as well as paid leave for training.

Large Employers tended to offer more types of training opportunities than small Employers within the qualitative research. This was often due to the greater resources available to them and greater means to support their Workers further training.

"Yes. Super important. We have in house training, learning and development teams who offer various things throughout the year. I put the word out and say you can do any sort of training you want. Just let me know how much it is, when you want to do it, and do this, and get, and we approve it. There's no hesitation" Brisbane, Large Employer

Base: All Employers (Small Employer n=182, Medium Employer n=133, Large Employer n=187)
ST3. Does your organisation provide employees with any training or training resources?

TRAINING AND TRAINING RESOURCES PROVIDED

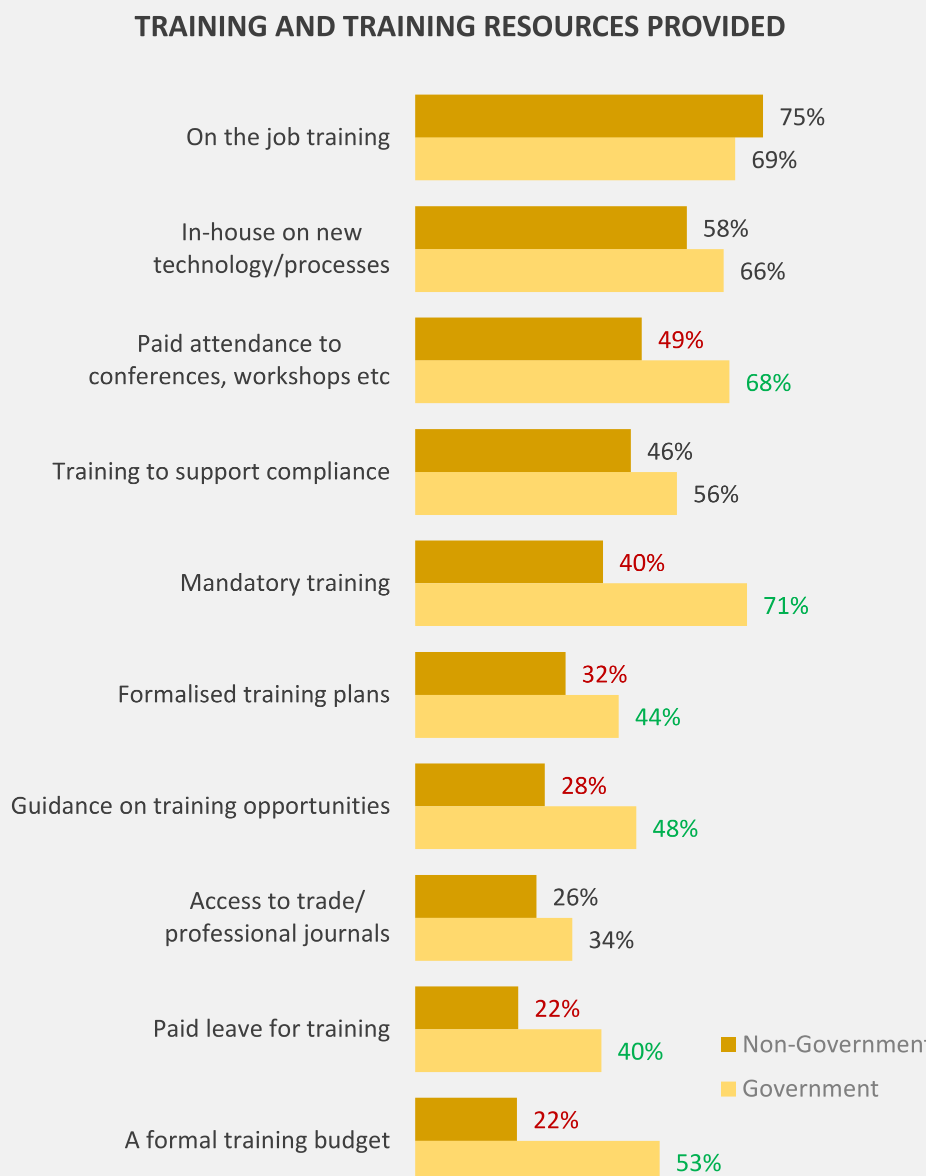


GREEN, ORANGE and RED figures are significantly different from each other

TRAINING PROVIDED

BY EMPLOYER TYPE

As well as being more likely to provide training overall, government department Employers are significantly more likely to provide mandatory training, formalised training plans, guidance on training opportunities, paid leave for training and paid attendance to conferences or workshops.



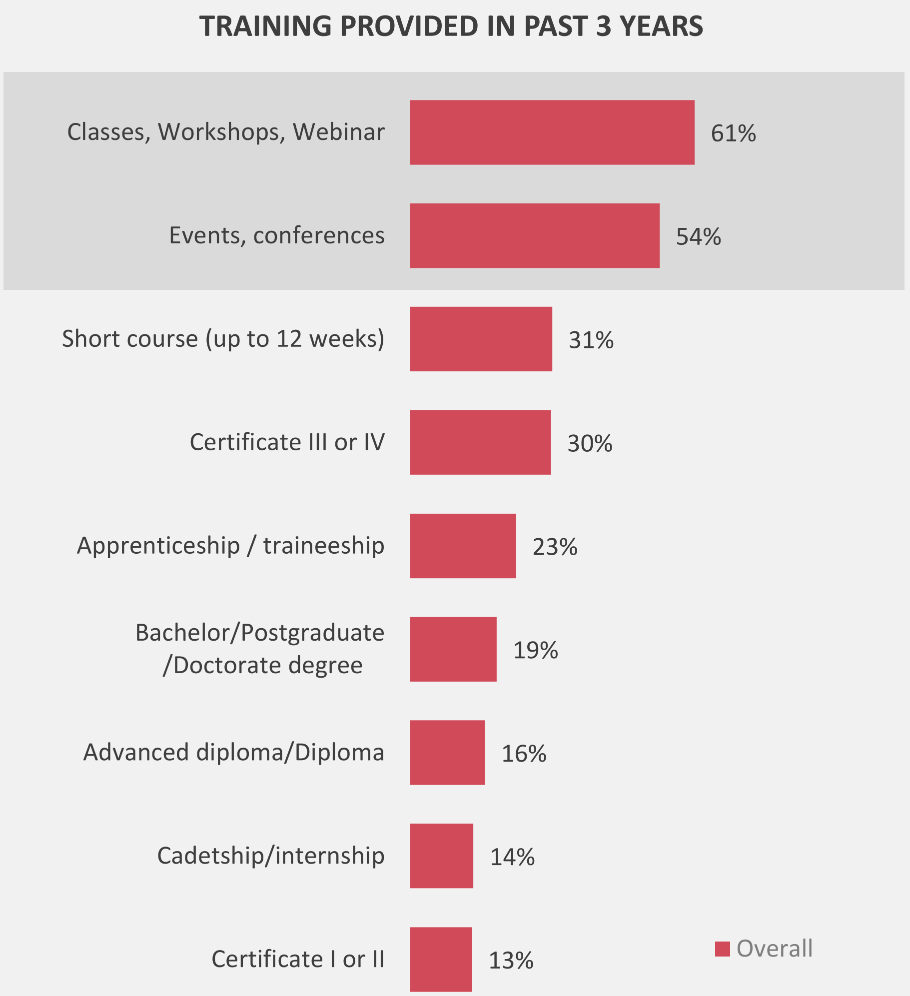
Base: All Employers (Non-Government n=384, Government n=80)
ST3. Does your organisation provide employees with training or training resources?

GREEN figures are significantly greater than RED figures

RECENT TRAINING PROVIDED

In the past 3 years, Employers surveyed have primarily provided Workers with training through **classes, workshops, webinars, events and conferences**.

One third of Employers have provided short courses and Certificate III or IV training.



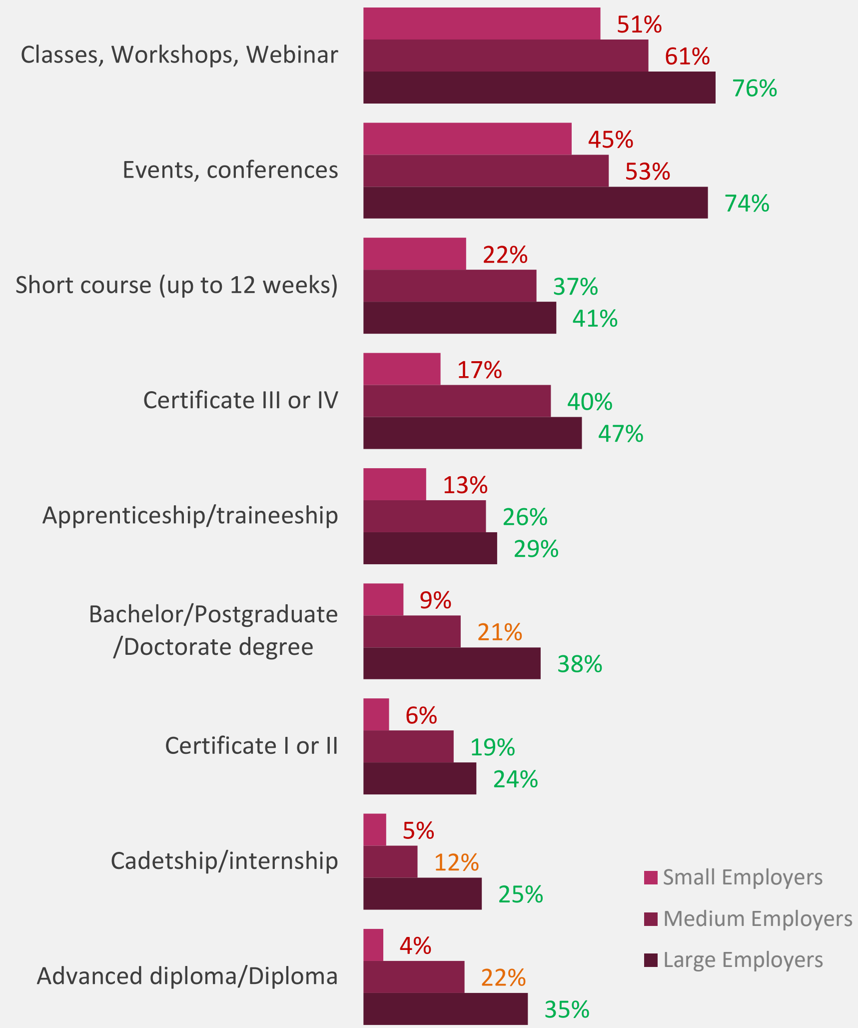
Base: Employers who provide training (n=473)
ST4. What type of training has your organisation provided or supported within the last 3 years?

RECENT TRAINING PROVIDED

BY EMPLOYER SIZE

Medium and large Employers surveyed are significantly more likely to provide training through longer term education such as certificates, diplomas and university degrees.

TRAINING PROVIDED IN PAST 3 YEARS



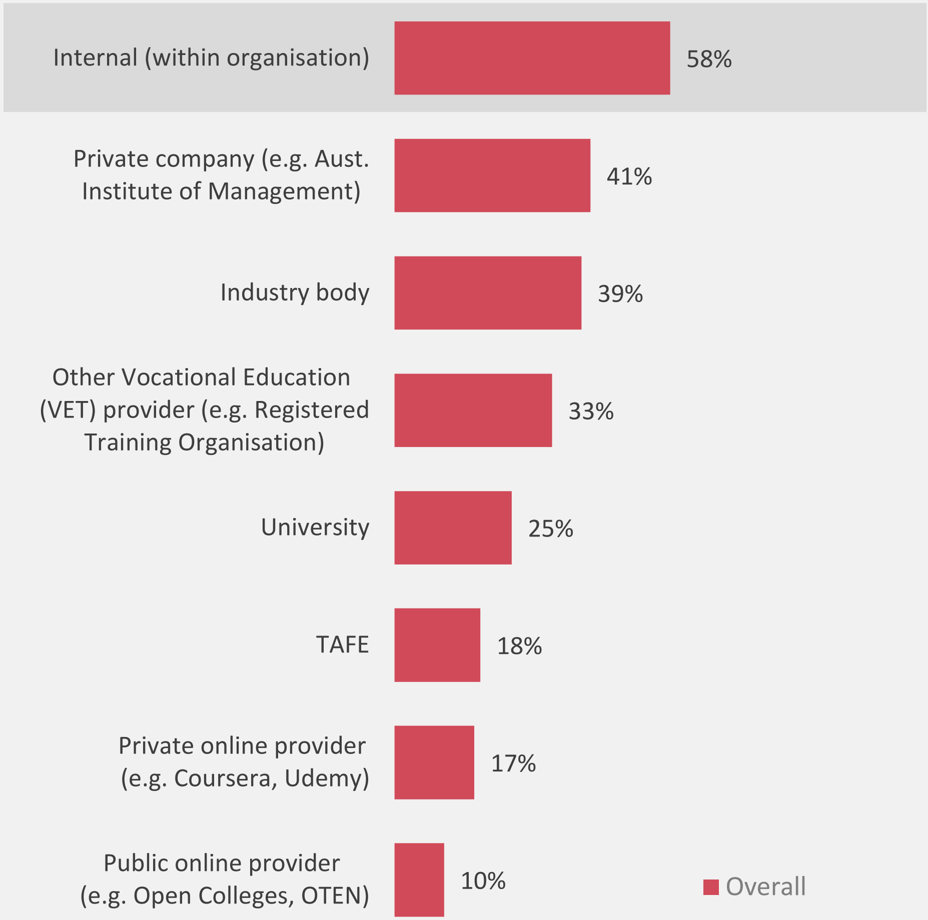
Base: Employers who provide training (Small Employer n=163, Medium Employer n=129, Large Employer n=181)
ST4. What type of training has your organisation provided or supported within the last 3 years?

GREEN, ORANGE and RED figures are significantly different from each other

TRAINING PROVIDER

The majority of Employers surveyed who provide training do so internally. The main external Employers accessed to provide training include private companies, industry bodies and other Vocational Education and Training (VET) providers.

WHO PROVIDES THE TRAINING?



Base: Employers who provide training (n=473)
ST5. Who provided the training?

HOW TRAINING IS PROVIDED

Training is typically provided through a **combination of online and face-to-face interaction**.

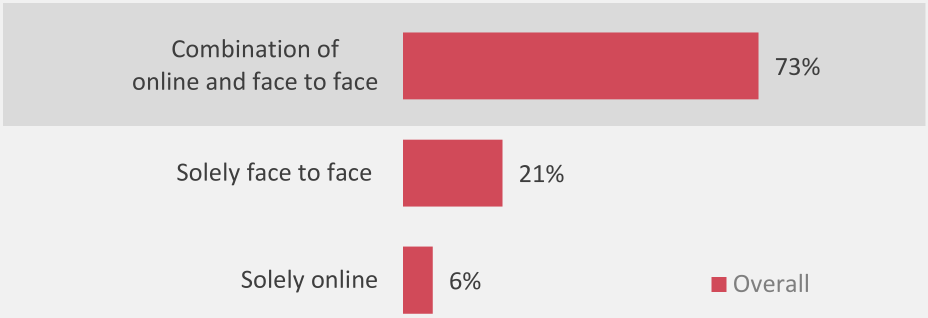
Surveyed small Employers are significantly more likely to use solely face to face training methods.

There are no differences in the way training is provided across industries.

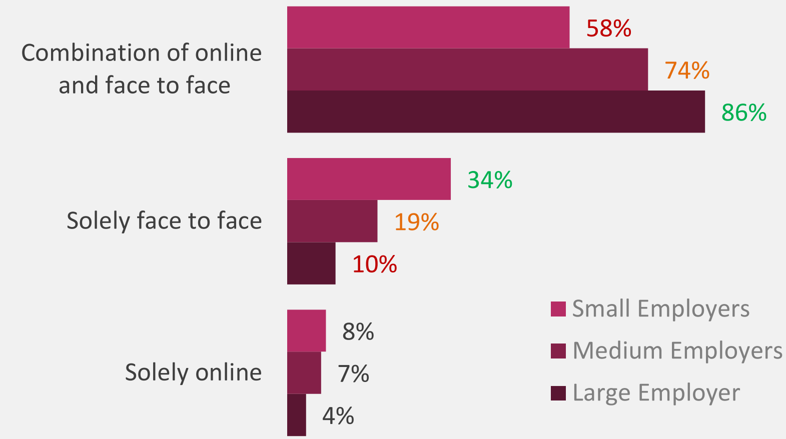
Small Employers and regional Employers within the qualitative research tended to mention online training as more frequently utilised than other options, due to the cheaper costs and greater availability of training via this medium.

"Unfortunately, regionally in our industry, there's very little available face to face. It's all done online now" Cairns, Small-Medium Employer

HOW IS THE TRAINING PROVIDED?



HOW IS THE TRAINING PROVIDED?
BY EMPLOYER SIZE



Base: Employers who provide training (n=473, Small Employer n=163, Medium Employer n=129, Large Employer n=181)
ST6. How is the training provided?

GREEN, ORANGE and RED figures are significantly different from each other

LEVELS OF ACCREDITATION

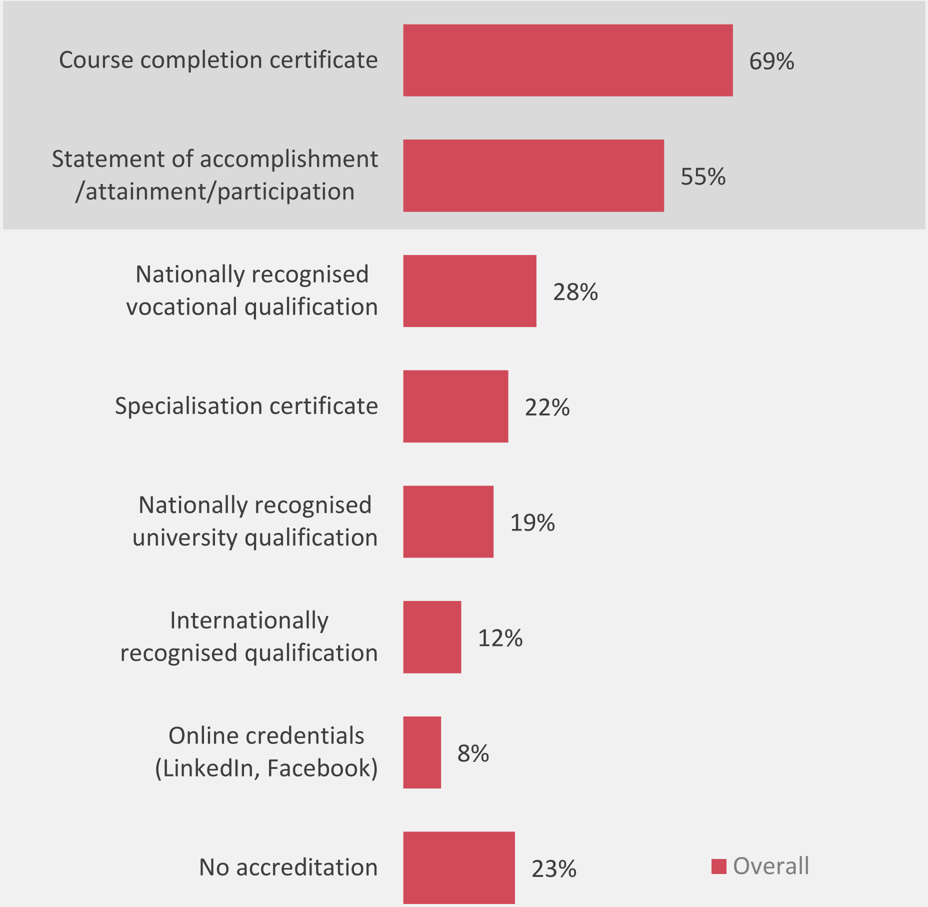
Of the training provided by Employers through short courses, classes, events, workshops and conferences, the main types of accreditation Workers receive are course completion certificates and/or statements of accomplishment/attainment/participation.

Around one third receive nationally recognised vocational qualifications.

One quarter do not receive any accreditation.

LEVELS OF ACCREDITATION ACHIEVED THROUGH TRAINING

For short course, classes, events, workshops/conferences



Base: Employers who provide short course, classes, events, workshops/ conferences (n=355)
ST7. Thinking about the short course, classes, events, workshops and / or conferences your organisation provides, what levels of accreditation were achieved through the training?

LEVELS OF ACCREDITATION

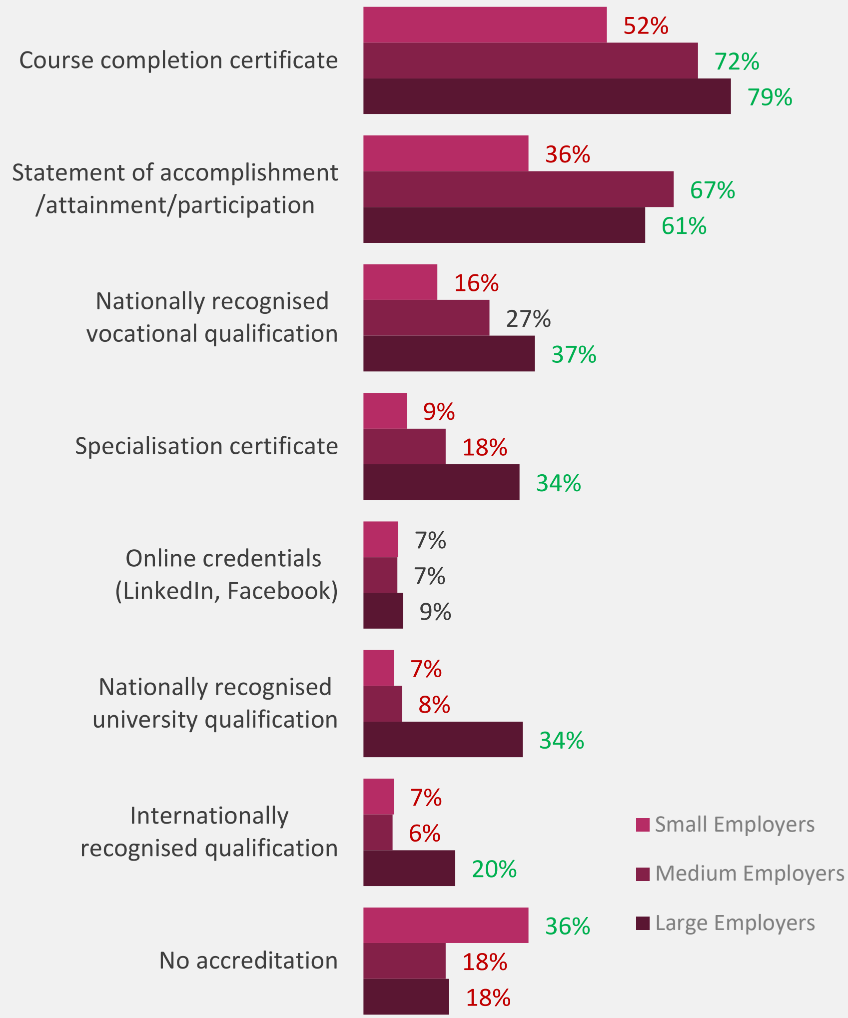
BY EMPLOYER SIZE

Around one third of large Employers surveyed provide training with accreditations that include nationally recognised vocational qualifications, nationally recognised university qualifications and/or specialisation certificates.

Small Employers are most likely to provide training through short course, classes, events, workshops and conferences that have no accreditations.

LEVELS OF ACCREDITATION ACHIEVED THROUGH TRAINING

For short course, classes, events, workshops/conferences



Base: Employers who provide short course, classes, events, workshops/conferences (Small Employer n=107, Medium Employer n=96, Large Employer n=152}
ST7. Thinking about the short course, classes, events, workshops/conferences your organisation provides, what levels of accreditation were achieved?

GREEN figures are significantly greater than RED figures

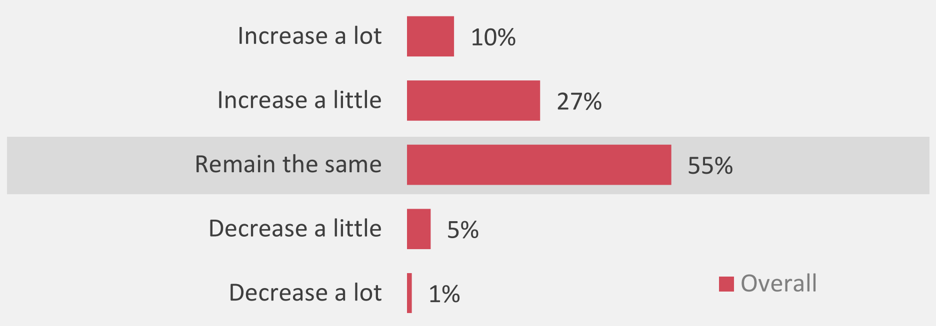
FUTURE TRAINING

Of surveyed Employers who provide training, around half expect the amount provided to remain the same over the next 3 years.

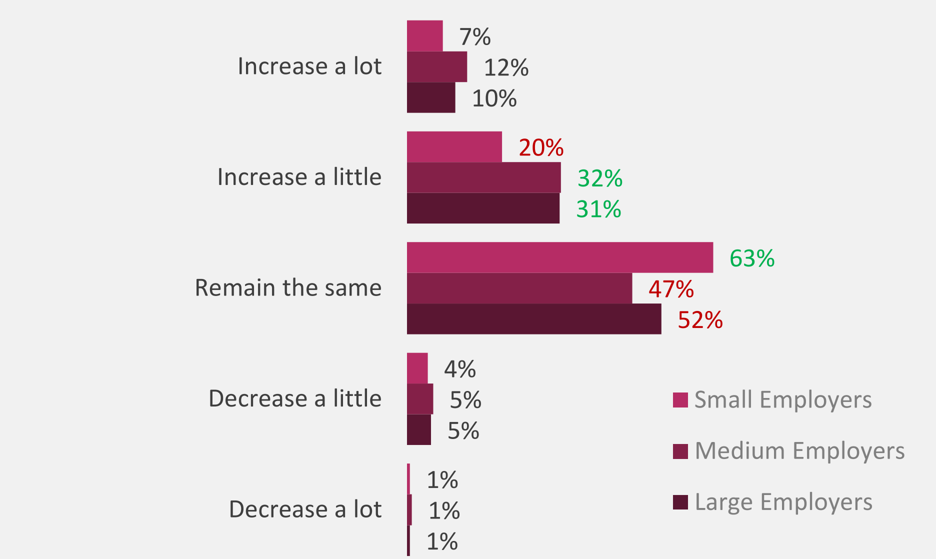
Around one third of Employers, (primarily medium and large Employers) expect to increase the amount of training they provide over the next 3 years.

These findings are consistent across industries.

EXPECTED AMOUNT OF TRAINING PROVIDED OVER THE NEXT 3 YEARS



EXPECTED AMOUNT OF TRAINING PROVIDED OVER THE NEXT 3 YEARS
BY EMPLOYER SIZE



Base: Employers who provide training (n=473, Small Employer n=163, Medium Employer n=129, Large Employer n=181}
ST8. Over the next 3 years do you expect the amount of training your organisation provides employees to…?

GREEN figures are significantly greater than RED figures

BARRIERS TO PROVIDING TRAINING

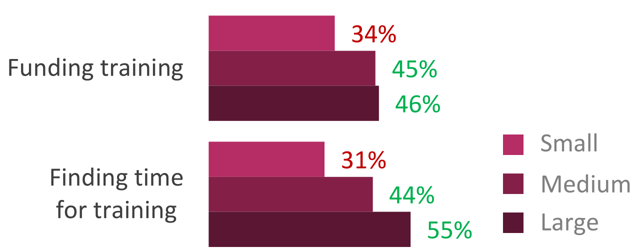
Overall, **funding and time taken are the primary obstacles to providing training or training** resources.

Finding the time amongst busy work schedules for training was a common barrier and frustration of training mentioned within the qualitative research.

Even managers within the Employer groups admitted that finding the time to prioritise and undertake training can be a frustrating pressure on Workers at times.

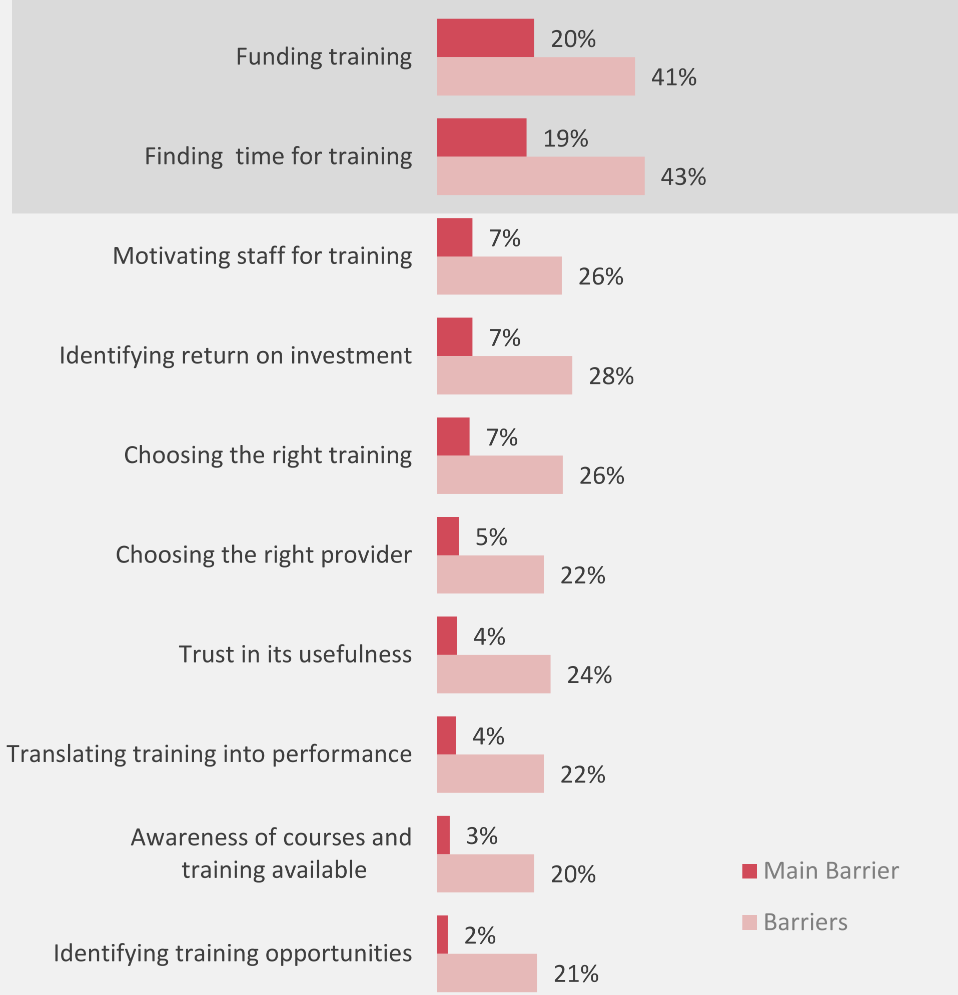
> *"Sometimes I think we're barely getting by with certain things as a team that really need to get done and prioritised, and upper management continue to expect training in new areas from us, but we don't have capacity"* Bundaberg, Small-Medium Employer

BARRIERS BY EMPLOYER SIZE



Base: All Employers (n=502)
ST9a. What are the barriers to providing training or training resources?
ST9b. What is the MAIN barrier to providing training or training resources?

BARRIERS TO PROVIDING TRAINING OR TRAINING RESOURCES



REGIONAL BARRIERS TO PROVIDING TRAINING

Within the qualitative research the cost of training and unavailability of training in regional areas was a large challenge and barrier for smaller regional Employers.

> *"It's very expensive for training if you want to actually go to do it face to face. It's ludicrously expensive to send staff down there"*
> Cairns, Small-Medium Employer

Other concerns mentioned by regional Employers was about the long term usefulness of the training due to high numbers of transient staff in their regional areas. They can hesitate to invest in staff training as they are unsure if the staff will stick around long enough for the business to reap the benefits of the training.

> *"I'm happy to train my staff but there isn't much loyalty with staff, so its hard to balance the investment of training and be able to reap the rewards"* Cairns, Small-Medium Employer

SKILLS & TRAINING

Worker Perspective

WHO HAS UNDERTAKEN TRAINING IN PAST 3 YEARS?

This snap shot shows the prevalence of Workers who have undertaken training in the last three years within the workforce. Around two-thirds of Workers surveyed have undertaken formalised training or education for their current or future employment in the past 3 years. **Managers, professionals and community and personal service Workers, as well as Workers in the Health Care & Social Assistance and Education & Training industries are the most likely to have undertaken training in the past 3 years.** A profile of Workers who have undertaken training in the past three years is available in the appendix.

UNDERTAKEN TRAINING

60% of Workers have undertaken formalised training in the past 3 years

GENDER

54% (male) 64% (female)

WORK HOURS

Full-time	65%
Part-time	56%
On a casual basis	52%

JOB TYPE

Management	69%
Professional	74%
Community or personal service	74%
Clerical or admin	44%
Blue collar	44%
Sales	49%

AGE

Under 25	77%
25 to 34	72%
35 to 44	65%
45 to 54	59%
55 to 64	49%
65+	45%

INDUSTRY

Health Care & Social Assistance	78%
Education & Training	77%
Public Order & Safety Services	69%
Professional & Scientific Services	65%
Tourism, Food & Beverage Services	62%
Financial & Real Estate Services	62%
Public Administration Services	59%
IT Services	56%
Construction	53%

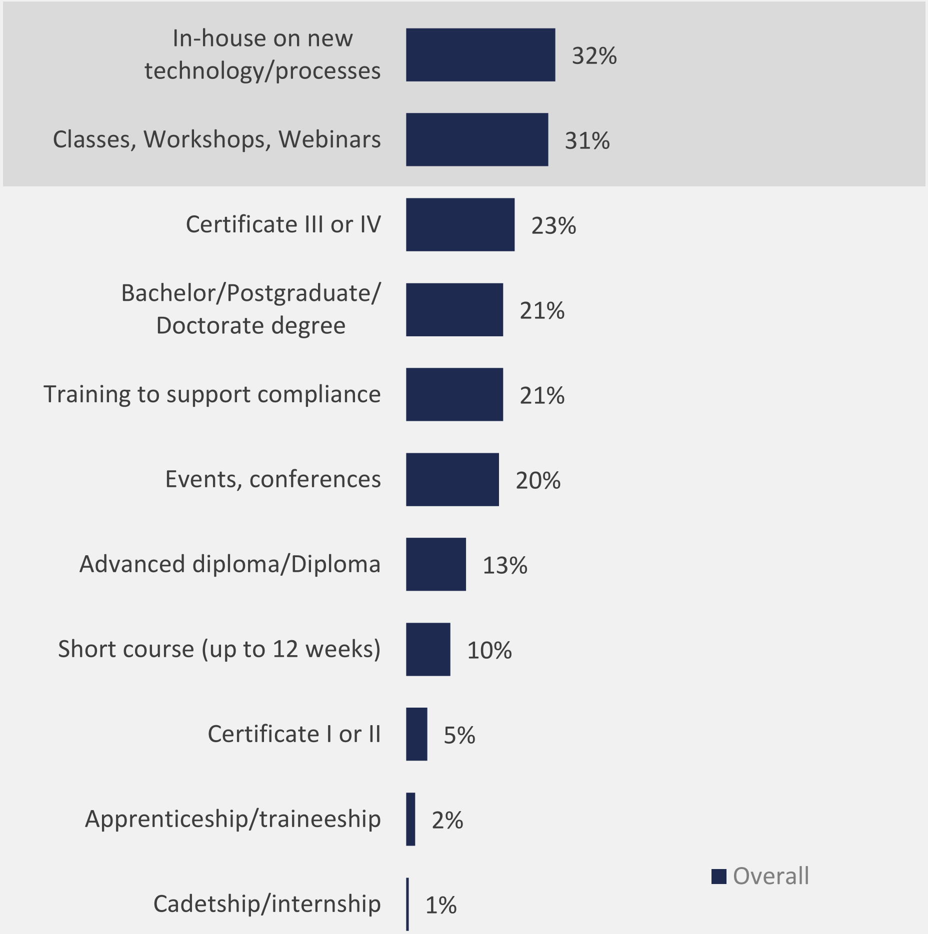
Base: Workers who have undertaken training in the past 3 years (n=904)

UNDERTAKEN TRAINING

Of those Workers surveyed who have undertaken training in the last 3 years, around one third have done in-house training on new technology/processes and one third have attended classes, workshops or webinars.

Around one quarter have done a Certificate III or IV course and one fifth have done a university degree.

UNDERTAKEN FORMALISED TRAINING OR EDUCATION FOR CURRENT OR FUTURE EMPLOYMENT IN THE PAST 3 YEARS



Base: Workers who have undertaken training in the past 3 years (n=861)
ST3. Are you currently, or have you in the past 3 years undertaken any formalised training or education for your current or future employment?

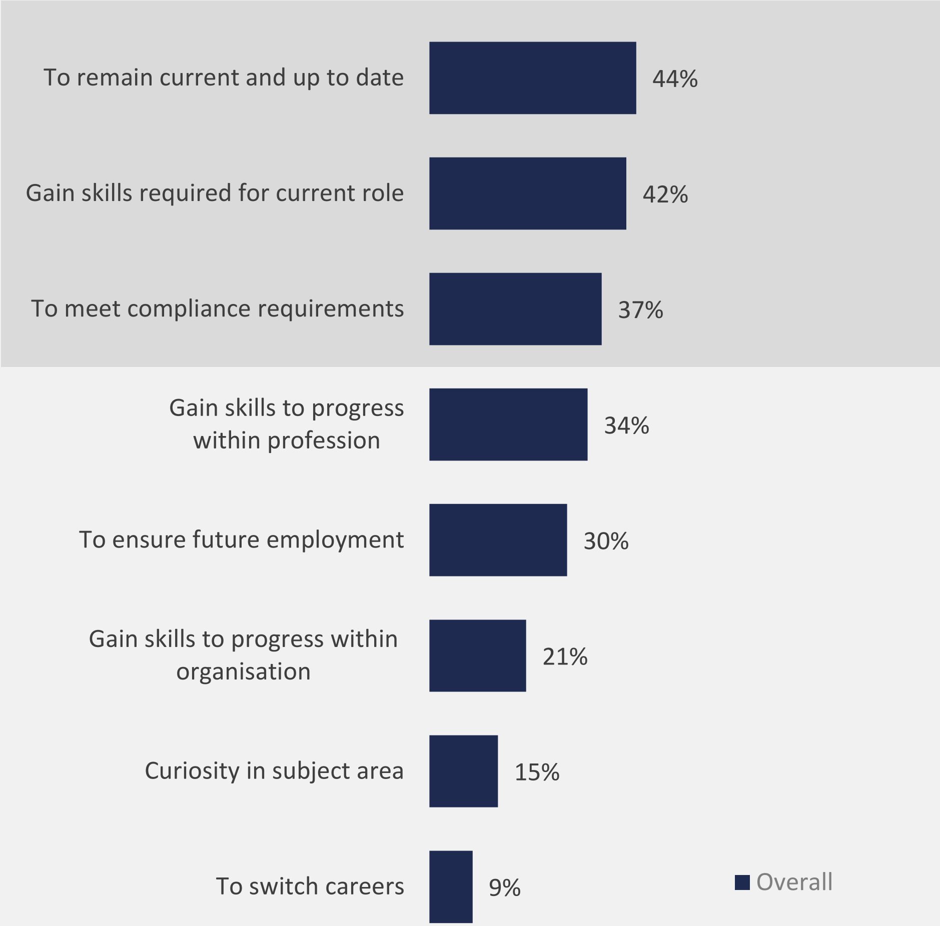
REASON FOR UNDERTAKING TRAINING

The primary reasons for undertaking training or education are to **remain current and up-to-date, to gain skills required for their current role and to meet compliance requirements**.

Around one third or fewer undertook training or education to gain skills to progress within their profession and/or business or to ensure future employment.

This suggests that when it comes to training, for most Workers, the primary focus is maintaining their skills rather than looking ahead at what skills they may require in the future.

REASON FOR UNDERTAKING TRAINING OR EDUCATION



Base: Workers who have undertaken training in the past 3 years (n=861)
ST5. Why did you undertake this particular training or education?

REASON FOR UNDERTAKING TRAINING

BY TYPE OF TRAINING

The motives for undertaking training or education differ depending on the type of training. Classes, workshops, webinars are more likely to be attended to gain skills required for their current roles and to remain up to date, while a University degree or a diploma is undertaken to ensure future employment.

	Bachelor/ Postgraduate/ Doctorate degree	Advanced diploma/ Diploma	Certificate III or IV	Short course	Classes, Workshops, Webinars	Events, conferences	In-house training on new technology/ processes	Training to support compliance
	n=181	n=94	n=170	n=36	n=112	n=38	n=142	n=52
Gain skills required for current role	25% ↓	33% ↓	**35%**	**44%**	**61% ↑**	34%	**64% ↑**	**44%**
Gain skills to progress within organisation	23%	16%	19%	31%	18%	18%	29%	13%
Gain skills to progress within profession	32%	41%	**32%**	**64% ↑**	39%	**42%**	29%	15% ↓
To remain current and up to date	27% ↓	32%	30% ↓	**47%**	**63% ↑**	**87% ↑**	**73% ↑**	**50%**
To switch careers	17% ↑	16%	16% ↑	8%	1% ↓	1%	1% ↓	1%
To avoid redundancy within current role	6%	6%	8%	6%	4%	1%	8%	10%
To meet compliance requirements	18% ↓	18% ↓	**32%**	33%	**50%**	**37%**	**58% ↑**	**83% ↑**
To ensure future employment	**40% ↑**	**48% ↑**	**38%**	17%	13% ↓	8% ↓	22%	25%
Curiosity in subject area	23% ↑	14%	10%	19%	26% ↑	16%	6% ↓	4%

Top % in each segment are shaded

Figures are significantly higher ↑ or lower ↓ than the average

Base: Workers who have undertaken training in the past 3 years
ST5. Why did you undertake this particular training or education?

FUNDING & SUPPORT

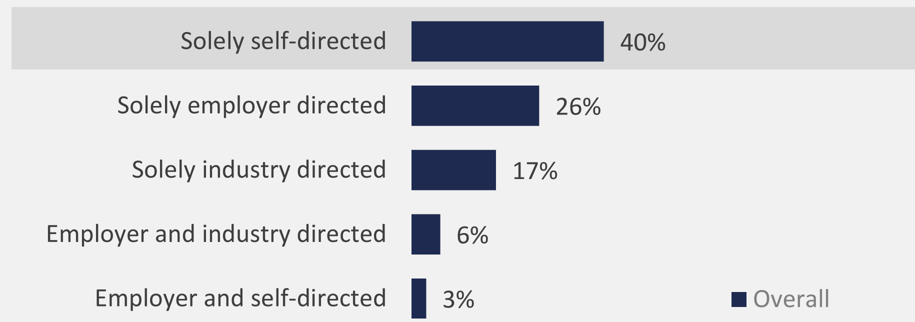
Two in five Workers surveyed initiate their own training, while one quarter of training is solely Employer directed.

Of the training solely initiated by Workers themselves, around half is fully funded personally. One fifth of Employers fully fund training or education solely initiated by Workers.

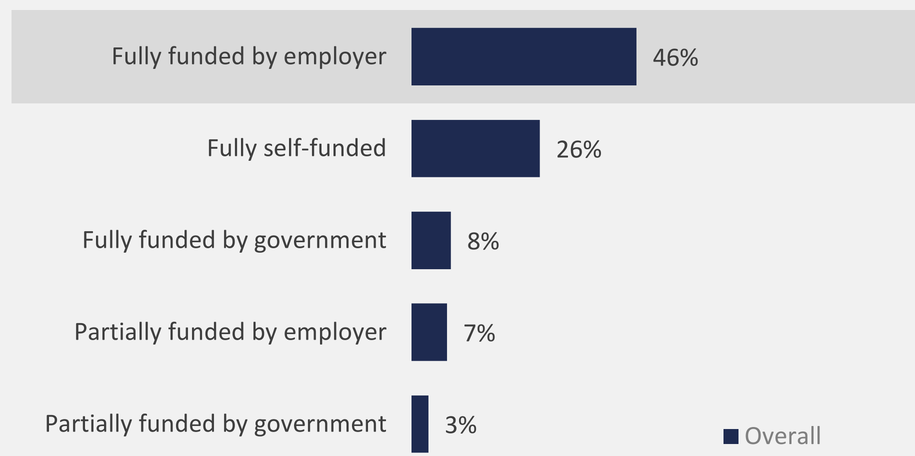
These findings may suggest that **Workers, rather than Employers, are more likely to be instigators of training, with Employers playing a more financially supportive role.**

"They've got so many employees, they're not going to come to me 'Hey, do you want to do this training'. So It's up to me, individually, if I want to learn something new" Brisbane, Standard Worker

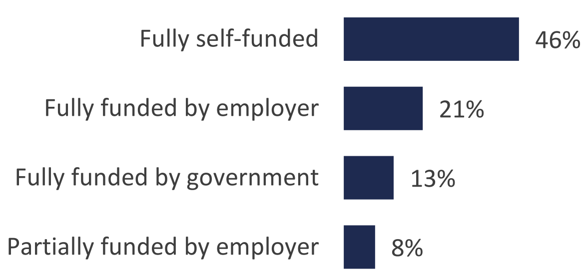
TRAINING OR EDUCATION WAS INITIATED BY…



SOURCE OF FUNDING FOR TRAINING OR EDUCATION



FUNDING FOR SOLELY SELF-DIRECTED TRAINING OR EDUCATION



Base: Workers who have undertaken training in the past 3 years (n=861)
ST6. Was this training or education…<response codes>?
ST7. How was this training or education funded / supported?

RESPONSIBILITY FOR TRAINING

RESPONSIBILITY FOR TRAINING

Within the qualitative research the majority of **Workers expected Employers to support their training, however expected that they be proactive themselves to drive this training**.

> *"If I want to get somewhere different in the workplace I'm not just going to sit back and wait for the department to show me and teach me something new"* Cairns, Standard Worker

> *"They've got so many employees, they're not going to come to me and say, 'Hey, do you want to do this training?' . So it's up to me, individually, if I want to learn something different"* Brisbane, Standard Worker

Due to the contract nature of their work and lack of an permanent employer to support and guide training, Alternative Workers often expressed a greater sense of proactive individual responsibility when it came to their training.

> *"I'm doing very little training unfortunately. Because I am not at the physical work I am often late on the uptake of new things at work so I have to learn about it on my own terms. I upskill myself when necessary"* Digital Nomad Worker

> *"I mean, I guess it's like, you don't have higher ups. So, if you need training, or you need advice, you have to go find it yourself"* Brisbane, Gig Economy Worker

FUNDING & SUPPORT

BY TYPE OF TRAINING

Surveyed Workers are significantly more likely to undertake university degrees and diplomas based on their own initiative.

Employers are more likely to fully fund classes, workshops and webinars. One third of Employers fully fund Workers who are studying for a diploma or a Certificate III or IV.

TRAINING OR EDUCATION WAS INITIATED BY…

	Bachelor/ Postgraduate/ Doctorate degree	Advanced diploma/ Diploma	Certificate III or IV	Short course	Classes, Workshops, Webinars	Events, conferences	In-house training on new technology/ processes	Training to support compliance
	n=181	n=94	n=170	n=36	n=112	n=38	n=142	n=52
Solely self-directed	**59%** ↑	**62%**↑	**49%**	**53%**	26% ↓	**42%**	12% ↓	6% ↓
Solely employer directed	12% ↓	13% ↓	20%	22%	**30%**	16%	**55%**↑	**44%**
Solely industry directed	15%	15%	19%	17%	20%	24%	9%	33%↑

SOURCE OF FUNDING FOR TRAINING OR EDUCATION

	Bachelor/ Postgraduate/ Doctorate degree	Advanced diploma/ Diploma	Certificate III or IV	Short course	Classes, Workshops, Webinars	Events, conferences	In-house training on new technology/ processes	Training to support compliance
Fully self-funded	**41%**↑	**38%**	**32%**	**42%**	13% ↓	**34%**	1% ↓	23%
Fully funded by employer	19% ↓	29% ↓	**32%** ↓	**36%**	**76%**↑	**47%**	**86%**↑	**62%**
Fully funded by government	13%	11%	12%	8%	3%	3%	2%	1%
Partially funded by employer	12%	10%	6%	6%	1% ↓	8%	6%	6%

Top % for each training type are shaded

Figures are significantly higher ↑ or lower ↓ than the average

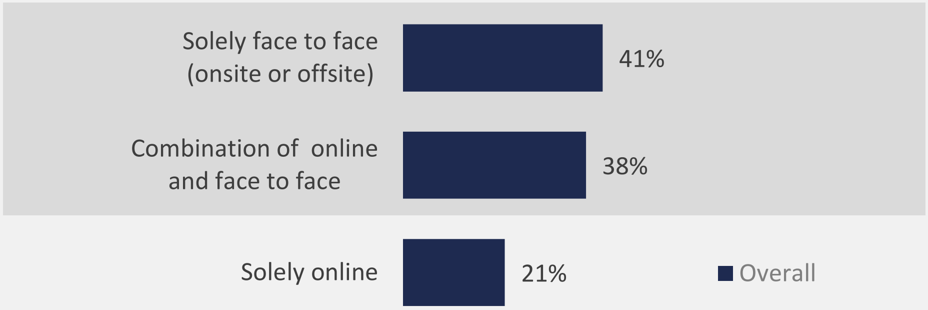
Base: Workers who have undertaken training in the past 3 years
ST6. Was this training or education…?
ST7. How was this training or education funded / supported?

TRAINING PROVIDER

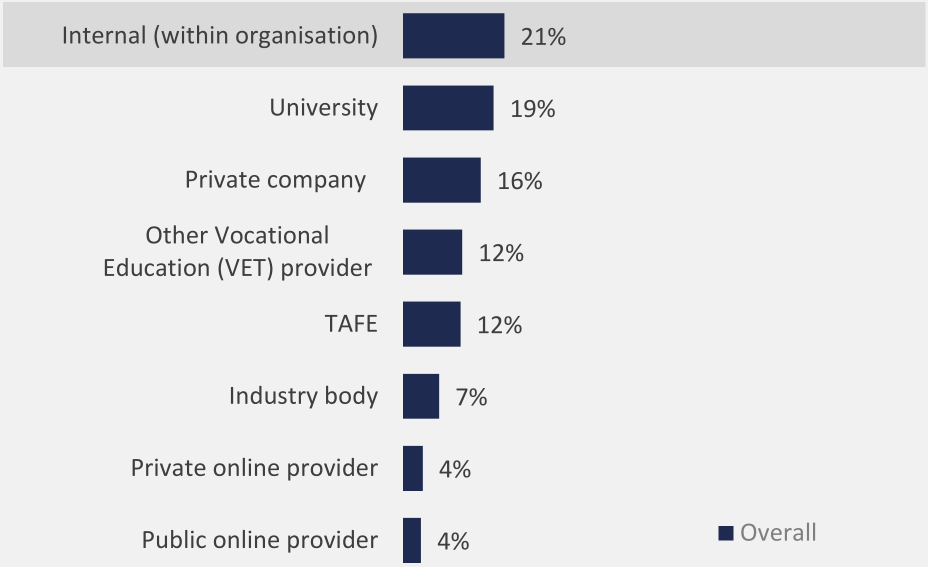
Overall, training or education is either solely face to face or a combination of face to face and online.

Aside from having internal training, surveyed Workers participate in training facilitated by universities and private companies.

HOW IS THE TRAINING PROVIDED?



WHO IS THE PROVIDER?



Base: Workers who have undertaken training in the past 3 years (n=861)
st8 Who was the provider of this training or education?
st9 How was this training or education provided?

TRAINING PROVIDER

BY TYPE OF TRAINING

The events and conferences attended by surveyed Workers are primarily provided by industry bodies and private companies. Short courses are also primarily provided by private companies. Both TAFE and other VET providers are the primary providers of Certificate III or IV training and diplomas.

HOW THE TRAINING OR EDUCATION WAS PROVIDED

	Bachelor/ Postgraduate/ Doctorate degree	Advanced diploma/ Diploma	Certificate III or IV	Short course	Classes, Workshops, Webinars	Events, conferences	In-house training on new technology/ processes	Training to support compliance
	n=181	n=94	n=170	n=36	n=112	n=38	n=142	n=52
Solely online	28%	31%	25%	25%	12%	5%	11% ↓	25%
Solely face to face (onsite or offsite)	35%	27%	**38%**	**47%**	**48%**	**68%** ↑	42%	**48%**
Combination of online and face to face	**37%**	**43%**	**38%**	28%	40%	26%	**48%**	27%

TRAINING OR EDUCATION PROVIDER

	Bachelor/ Postgraduate/ Doctorate degree	Advanced diploma/ Diploma	Certificate III or IV	Short course	Classes, Workshops, Webinars	Events, conferences	In-house training on new technology/ processes	Training to support compliance
University	**74%** ↑	10%	2% ↓	8%	4% ↓	5%	1% ↓	2% ↓
TAFE	3% ↓	**29%** ↑	**32%** ↑	8%	1% ↓	1%	2% ↓	1%
Other Vocational Education (VET) provider	2% ↓	**20%**	**23%** ↑	17%	13%	1%	5%	17%
Public online provider	3%	5%	8%	3%	1%	1%	1%	2%
Private online provider	2%	3%	4%	8%	9%	3%	2%	4%
Private company that provides training	8% ↓	**20%**	**18%**	**36%** ↑	**16%**	**32%**	9%	**25%**
Industry body	2% ↓	4%	2%	3%	**18%** ↑	**42%** ↑	8%	6%
Internal (within organisation)	2% ↓	6% ↓	4% ↓	14%	**30%**	18%	**66%** ↑	**37%**

Top % in each segment are shaded

Figures are significantly higher ↑ or lower ↓ than the average

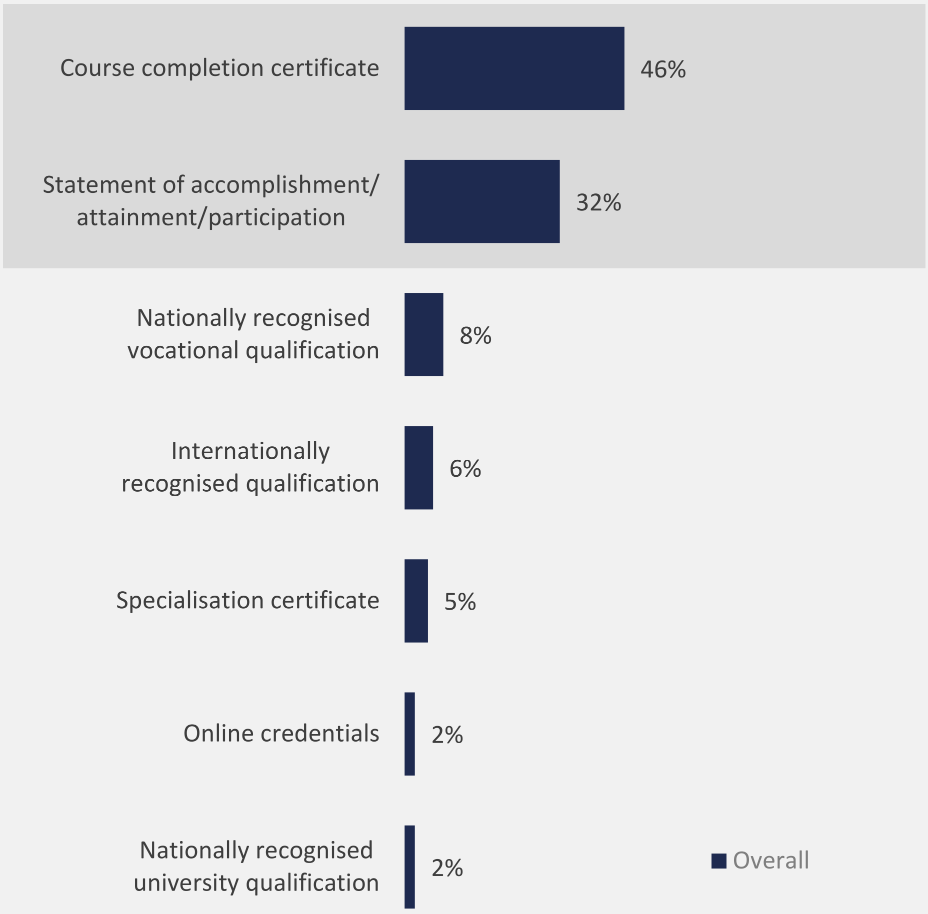
Base: Workers who have undertaken training in the past 3 years
ST8 Who was the provider of this training or education?
ST9 How was this training or education provided?

LEVELS OF ACCREDITATION

Among Workers surveyed whose most significant training is a short course, classes, events, workshops and/or conferences, the main types of accreditation received are course completion certificates and/or statements of accomplishment/attainment/participation.

LEVELS OF ACCREDITATION ACHIEVED THROUGH TRAINING

For short course, classes, events, workshops/conferences



Base: Workers whose most significant training was a short course, classes, events, workshops and/or conferences (n=186)
ST10. What level of accreditation will/have you achieved through this training or education?

BARRIERS TO TRAINING

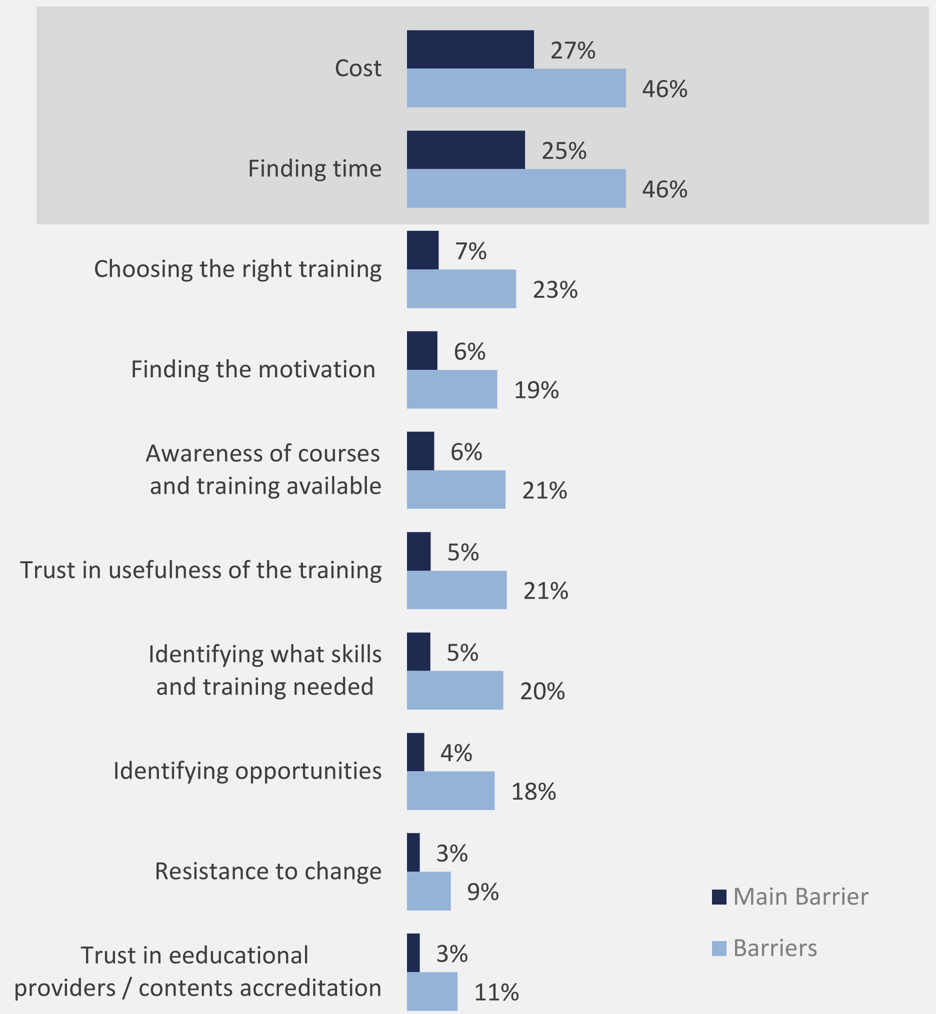
Much like with Employers, **cost and time are the main barriers to undertaking training or education for Workers.**

Alternative Workers are presented unique challenges when it comes to completing training.

Some concern was expressed in the qualitative research about Alternative Workers' ability to self-fund compulsory industry training and the financial pressure this would put on these types of Workers.

"It does depend on the industry though. Any industry where you have to licensing, you have to do compulsory and continuing education. If you did that in a gig economy. You would be responsible for all of that continuing training to keep your license, and so that could become a problem. Whereas normally the job would send you for all that kind of training in older times" Brisbane, Gig Economy Worker

BARRIERS TO UNDERTAKING TRAINING OR EDUCATION



Base: Workers undertaking training or education (n=861)
ST12a. What are the barriers to undertaking training or education?
ST12b. What is the MAIN barrier to undertaking training or education?

WHO IS PLANNING TO UNDERTAKEN TRAINING IN NEXT 3 YEARS?

This snap shot shows the prevalence of Workers who plan to undertake training in the next three years within the Workforce. **Just under half of Workers surveyed plan to undertake significant training or education in regard to their current or future employment within the next 3 years.** A profile of Workers who are planning to undertaken training in the next three years is available in the appendix.

PLANNING TO TRAIN

44% of Workers plan to undertake significant training in the next 3 years

WORK HOURS

Full-time	46%
Part-time	41%
On a casual basis	43%

JOB TYPE

Management	51%
Professional	55%
Community or personal service	52%
Clerical or admin	33%
Blue collar	30%
Sales	39%

GENDER

39% (male) 48% (female)

62% Of those who are currently or have undertaken training in the past 3 years, plan to undertake training in the next 3 years

AGE

Under 25	62%
25 to 34	59%
35 to 44	49%
45 to 54	46%
55 to 64	29%
65+	28%

INDUSTRY

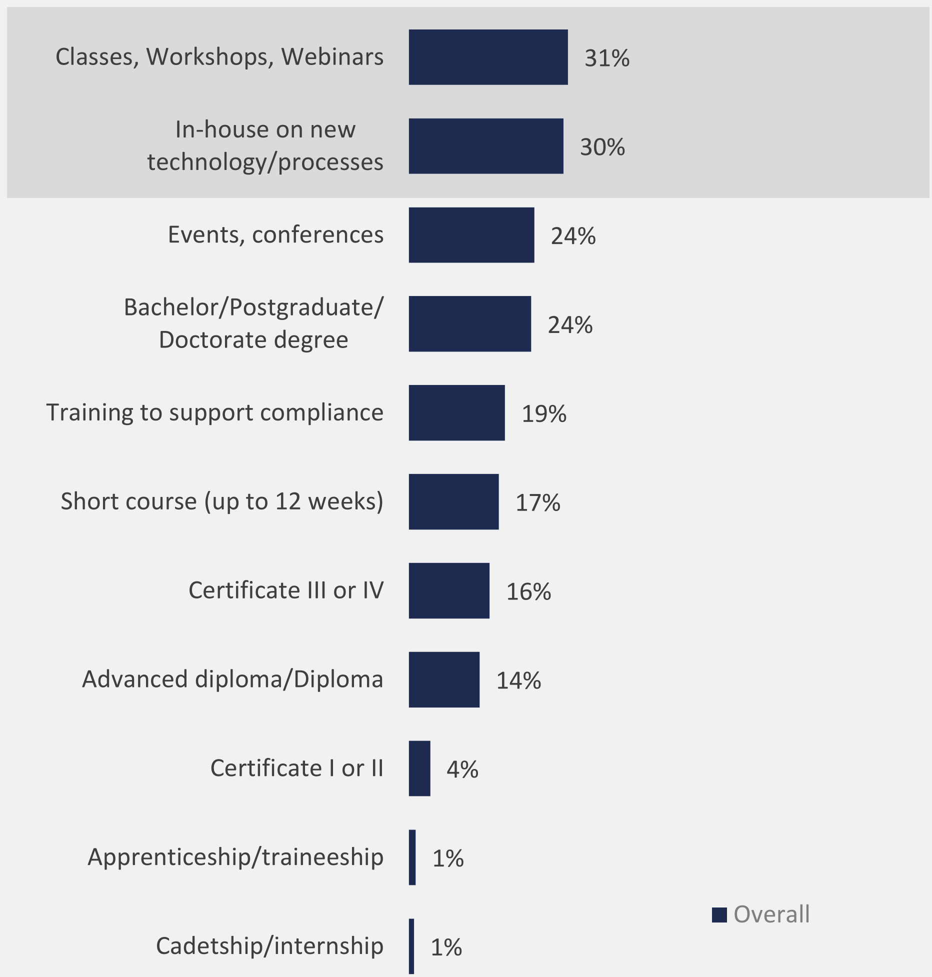
Professional & Scientific Servicess	58%
Education & Training	56%
Public Order & Safety Services	52%
Health Care & Social Assistance	52%
IT Services	47%
Public Services	43%
Retail	43%
Tourism & Food & Beverage Services	43%

Base: Workers who plan to undertake significant training or education in regards to their or future employment within the next 3 years? (n=669)

FUTURE TRAINING

Among Workers surveyed who plan to undertake significant training or education regarding their current or future employment within the next 3 years, most intended to participate in both in-house and external training in the form of classes, workshops, and webinars.

PLAN TO UNDERTAKE TRAINING OR EDUCATION IN THE NEXT 3 YEARS



Base: Workers who are plan to undertake training within the next 3 years (n=669)
ST13. Do you plan on undertaking any significant training or education in regards to your current or future employment within the next 3 years?

MOST IMPORTANT SKILLS IN THE NEXT DECADE

Both Employers and Workers surveyed feel that **communication skills will be the most important skills for Workers to have in the next 10 years.**

Skills also seen to be of **importance are adaptive skills, self-management skills, digital skills, analytical skills and technical skills** specific to an industry.

Management skills and leaderships are also a secondary focus, as noted in particular among Gig Economy Workers researched.

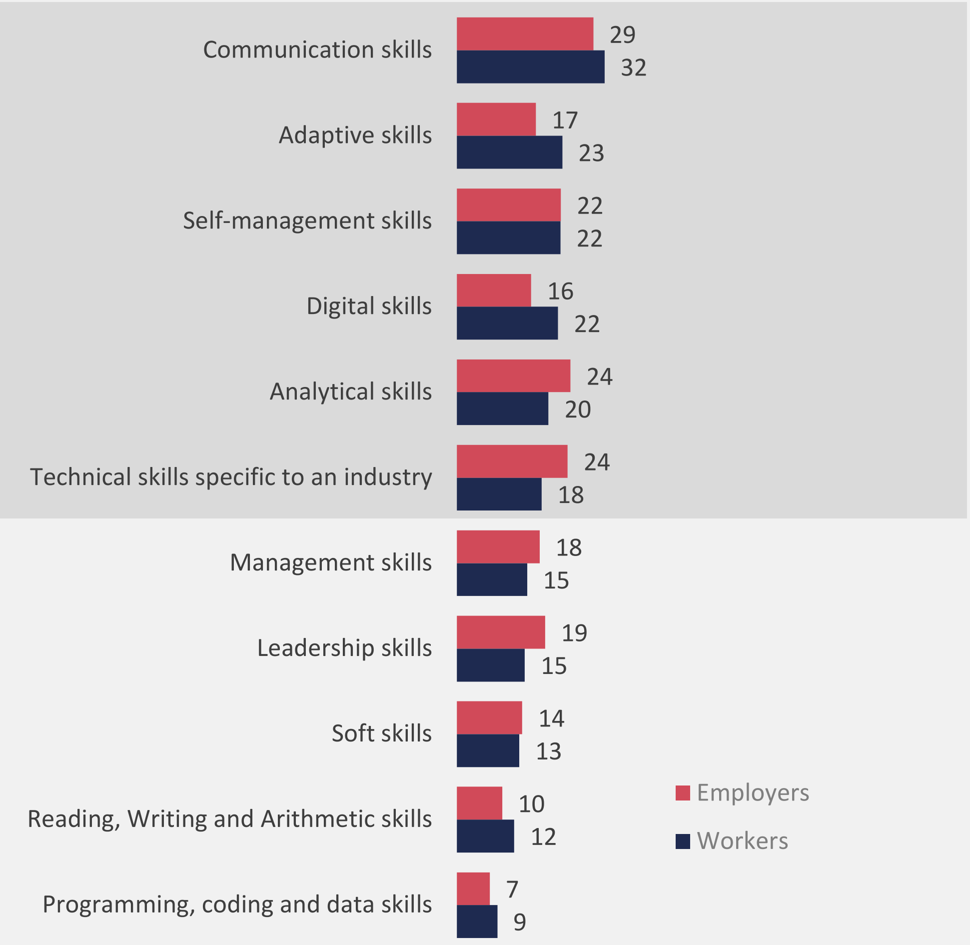
Reading, writing, and arithmetic skills, and programming, coding and data skills are considered to be of lesser importance in the next decade.

"I think proven skills and communication skills is going to be a big role always in the future. In our industry, because we're dealing with tourism, you've got to have great communication skills"
Cairns, Small-Medium Employer

"I think communication/clarity is the most important skill to have when working in a job like mine and that will only increase" Digital Nomad Workers

Base: All respondents (Workers n=1515, Employers n=502)
ST10/ST14. Which of the following skills do you think will be the most important for Workers in your industry to have in the next 10 years?
Rank 1, 2, 3, with 1 being the most responsible

MOST IMPORTANT SKILLS FOR WORKERS IN THE NEXT 10 YEARS
RANK SCORE SHOWN



VET AND FUTURE SKILLS

SOFT SKILLS

There is some scepticism about the capability of VET to tackle future skill needs.

However, **in the future VET is seen to be an potential vehicle to fill the gaps in regard to soft skills, such as communication, adaptive and self management skills** especially when these skills aren't addressed in tertiary university education programs.

> *"[At university] the focus is off building emotional intelligence and stuff like that. I think there is a gap"* Brisbane, Large Employer

> *"I think it needs to be less theory and more hands on. More practical"* Bundaberg, Small-Medium Employer

> *"Perhaps around learning new technologies, it's not really a fast changing enough environment to keep up with the changes e.g. probably better to run short courses on a demand basis to learn some of the more rapidly changing apps and platforms etc"* Digital Nomad Worker

SMALL BUSINESS SKILLS

Alternative Workers see VET as a viable platform to teach them small business skills **specific to their irregular income and fluctuating nature of their work**.

> *"How to market yourself and digital commerce. That stuff is really hard. I've done a lot of that with no training. It's intense" Brisbane, Gig Economy Worker*

> *"You need to have a fund for this and a fund for that as well as a sick day fund and how to contribute to super" Brisbane, Gig Economy Worker*

FOCUS ON THE FUTURE

FOCUS ON THE FUTURE
Summary of Findings

EXPECTATION OF FUTURE SKILL REQUIREMENTS
Some disparity appears among Worker's and Employer's expectations in regard to future skill changes in the next 10 years. **The majority of Workers think the skills required in their profession will change slightly to moderately. Employers, on the other hand, believe the skills required in their industry will change moderately to a lot over the next 10 years.**

CONFIDENCE IN FUTURE USEFULNESS OF CURRENT SKILLS
The majority of Workers believe their current skills and experience will equip them well for the changes in their profession or industry within the next 10 years. However, their positivity is relative to their expectation that there will only be a moderate change to the skills required in the future. Confidence in current skills significantly decreases as the amount of change expected increases.

PERCEIVED PREPAREDNESS FOR THE FUTURE
Just over half of Employers consider themselves prepared for where their industries and the required skills are heading in the next 10 years. However, as with Workers, an Employers' preparedness is relative to the degree to which they feel the skills required will change in the next 10 years. Organisational preparedness significantly decreases as the amount of change expected increases.

FUTURE CONFIDENCE IN AVAILABILITY OF SKILLS
Employers' confidence that in 10 years they will be able to find employees who have the right skills for their organisation and where the industry is heading, is moderate and strikingly similar to their current levels of confidence. The similarity between current and future outlooks is suggestive that Employers are looking to the future with the same mindset as the present

THE EMPLOYER DILEMMA
The majority of Employers (59%) feel prepared for the future and where their industry is heading. However, half of Employers (56%) currently have challenges finding the employees with the right skills and have similar levels of confidence for the future. In addition, two-thirds of Employers (66%) expect that skills **will** change moderately to a lot in the next 10 years. These discrepancies in Employers' future perceptions and expectations highlight a disconnect between Employers' current experiences and future outlook.

EXPECTATION OF FUTURE SKILL REQUIREMENTS

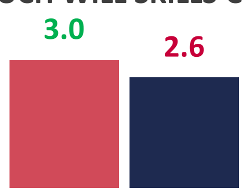
The majority of Workers surveyed think the skills required in their profession will change slightly to moderately.

The majority of Employers believe the skills required in their industry will change moderately to a lot over the next ten years.

Significantly more Employers think the skills required will change a lot, when compared to Workers.

This finding highlights that Workers and Employers are not aligned when it comes to their future skill outlook for the next 10 years.

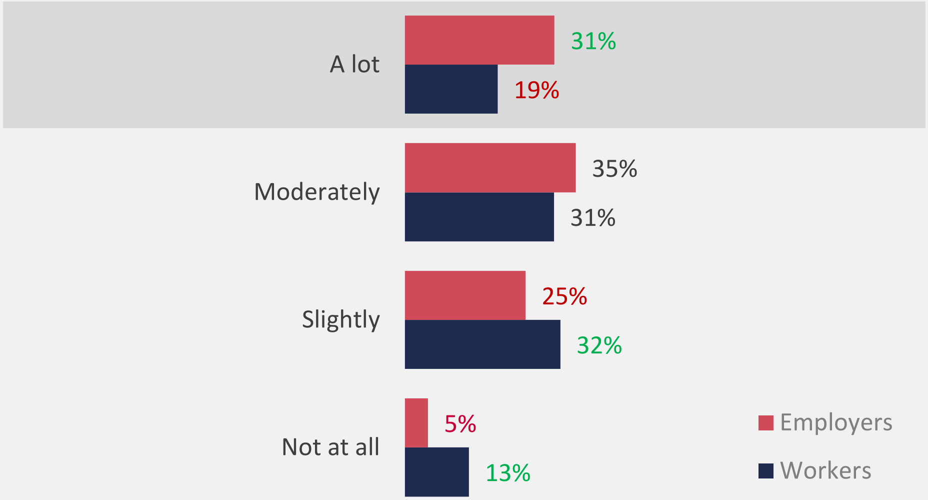
EMPLOYERS v WORKERS
HOW MUCH WILL SKILLS CHANGE?



MEAN CHANGE OUT OF 4

Base: All respondents (Workers n=1515, Employers n=502)
ST1. How much do you think the skills required in your profession/ industry will change in the next 10 years?

How much will the skills required in your profession/industry change in the next 10 years?

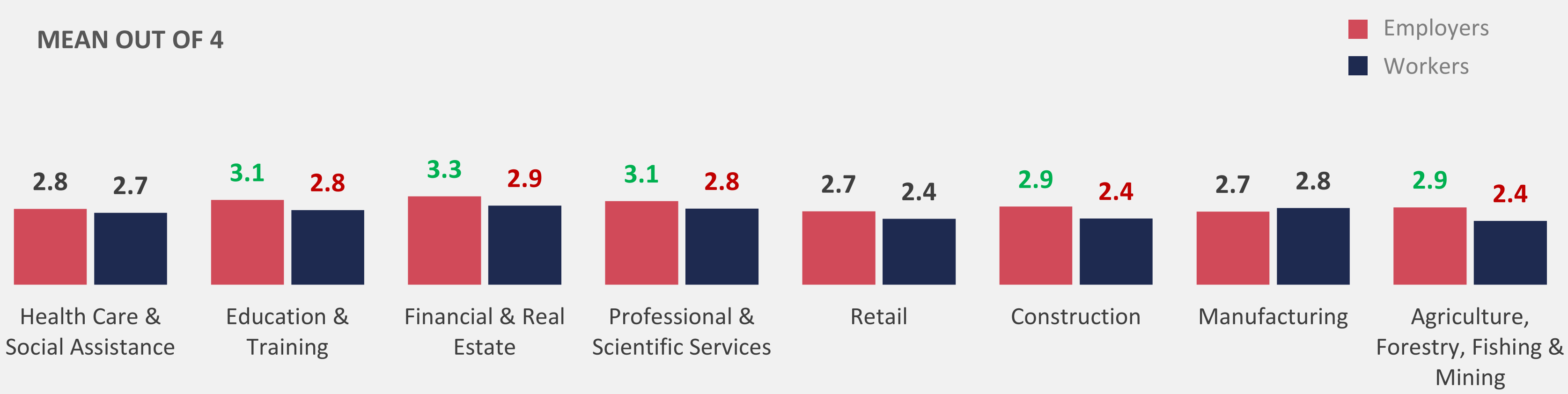


GREEN figures are significantly greater than RED figures

PERCEPTION OF FUTURE SKILL CHANGES

BY INDUSTRY

There are significant differences between Employers and Workers surveyed in regard to how much they feel the skills required within their industry will change in the next decade. Employers in the Education & Training, Financial & Real Estate, Professional & Scientific Services, Construction and the Agriculture, Forestry & Fishing & Mining industries feel that the required skills will change significantly more than the Workers in the same industry.



Base: All respondents (Workers n=1515, Employers n=502)
ST1. How much do you think the skills required in your profession/ industry will change in the next 10 years?

GREEN figures are significantly greater than RED figures

ATTITUDES TO LIFE LONG LEARNING

ATTITUDE TO LEARNING

There was a spectrum of concern about training and future skill requirement for the future amongst the Workers that participated in the qualitative phase. All saw the value in continuing to learn and build their work related skills. Below is an overview of the spectrum of attitudes expressed within the qualitative research.

The majority of attitudes

SPECTRUM OF ATTITUDES

GRADUAL SKILLS WILL BE SUFFICIENT	ACTIVELY LEARNING IN SOME WAY	RE-SKILLING FOR THE FUTURE
Some Workers have a casual attitude when it comes to futureproofing their skill set, considering the on the job skills they are developing and general life skills to be sufficient.	Others consider that the right mindset, and a drive and willingness to learn to be sufficient to give them the skills required to succeed now and into the future.	Within the groups there were a few Workers who consider substantial change to skill sets and their profession is required to futureproof themselves
"Whether you've got a job or not got a job, you don't just stop learning. You are still learning every day, by asking 'What app you using Lisa', or Lisa sends you a link to an app" Cairns, Standard Worker *"I think so. I don't think anything's going to change all that much"* Bundaberg, Small-Medium Employer	*"My goal every year is I make sure I do something, whether it's a course or whatever. I must do something every year"* Brisbane, Large Employer *"Each opportunity is different and requires new skills, that's why everyday YouTube is constantly playing in the background as I teach my self new skills to meet the requirements of the job"* Digital Nomad Worker	*"I've had to watch technology take over the property space so I'm just going to keep upskilling so that I can stay ahead of technology. Yeah I've started doing beauty training. I'm choosing to do things that I know are safe from computers"* Gold Coast, Gig Economy Worker

CONFIDENCE IN FUTURE USEFULNESS OF CURRENT SKILLS

The majority of Workers surveyed **believe their current skills and experience will equip them well** for the changes in their profession or industry within the next 10 years.

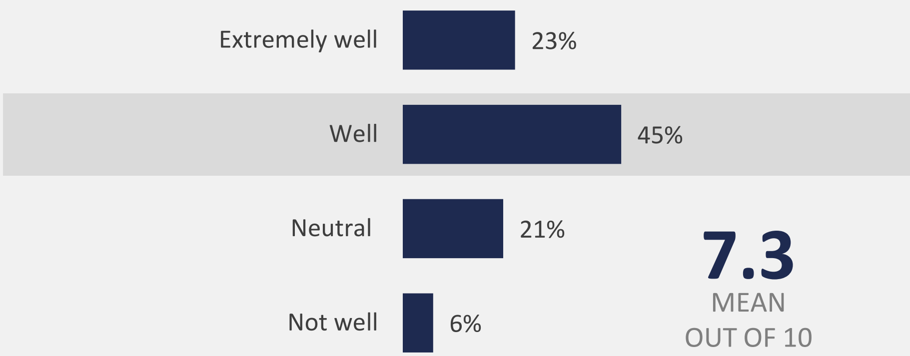
It must be noted that, as shown on the previous slides, that Workers feel the skills required in the next 10 years are only likely to change slightly to moderately. Therefore, **their positivity about their current skills being equipped for change, is relative to the moderate change they expect**.

The bottom chart shows that the more change Workers expect, the less confident they are about their current skills being sufficient for the future.

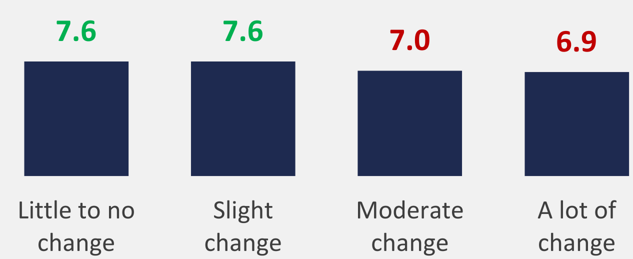
This coupled with Workers' focus on training for their current job, suggests that Workers are not thinking in depth about the future and are grounded in the now.

Base: All Workers (n=1515)
ST2. How well do you think the skills and experience you currently have will equip you for the changes your profession or industry is likely to experience in the next 10 years?

How well will your current skills and experience equip you for the changes in your profession/industry in the next 10 years?



EXPECTED CHANGE BY CONFIDENCE IN SKILLS (MEAN CONFIDENCE OUT OF 10)



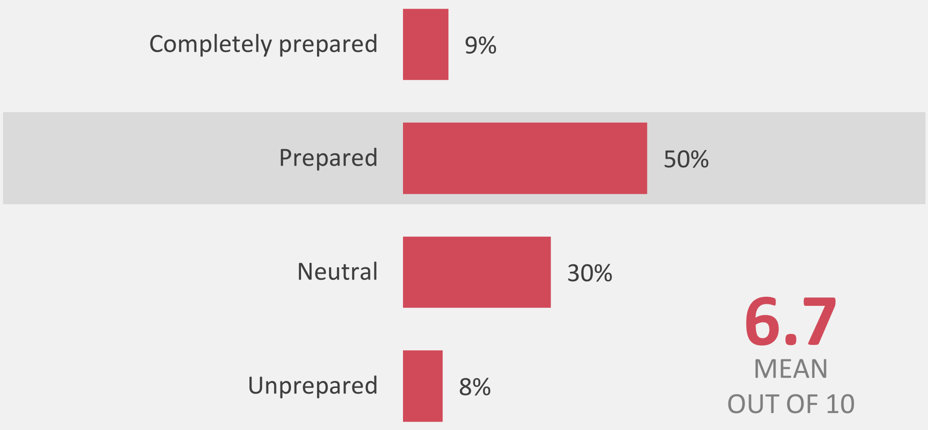
GREEN figures are significantly greater than RED figures

PERCEIVED PREPAREDNESS FOR THE FUTURE

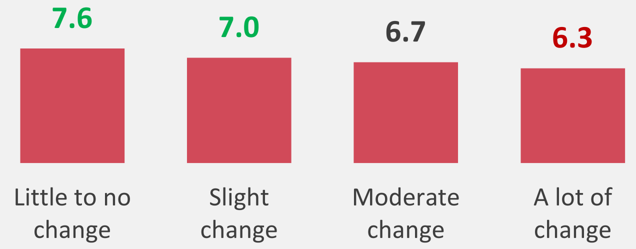
Just over half of surveyed Employers (59%) consider themselves prepared for where their industries and the required skills are heading in the next 10 years.

As with Workers, **an Employers' preparedness is relative to the degree to which they feel the skills required will change in the next 10 years.**

How prepared is your organisation for where your industry and the skills required to succeed are heading in the next 10 years?



EXPECTED CHANGE BY CONFIDENCE IN SKILLS (MEAN CONFIDENCE OUT OF 10)



Base: All Employers (n=502)
ST2a. How prepared is your organisation for where your industry and the skills required to succeed are heading in the next 10 years?

GREEN figures are significantly greater than RED figures

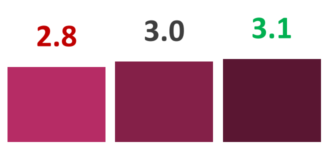
PERCEIVED PREPAREDNESS FOR THE FUTURE

BY EMPLOYER SIZE

Small and medium Employers surveyed are significantly more likely to feel prepared. Again, this is in relation to how much these Employers believe the skills required in their industry will change in the next 10 years.

Smaller Employers are significantly more likely to feel that there will be less change, and therefore are more likely to feel they are prepared for this minimal change. Large Employers expect more change and therefore feel less prepared.

HOW MUCH WILL SKILLS REQUIRED CHANGE?

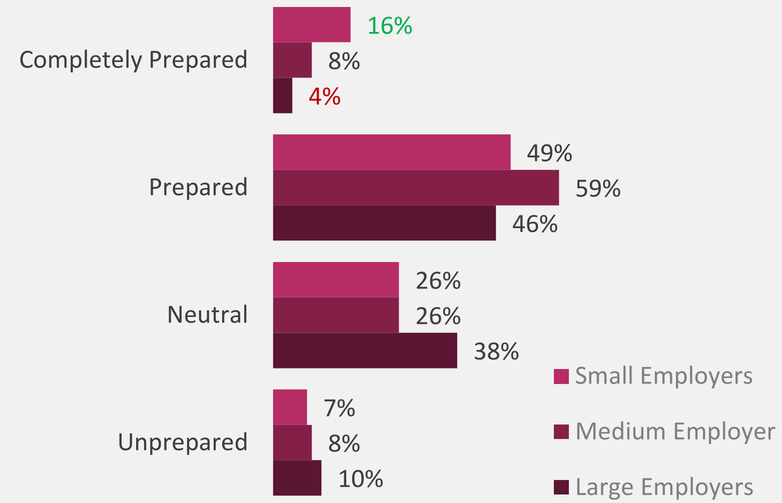


MEAN CHANGE OUT OF 4

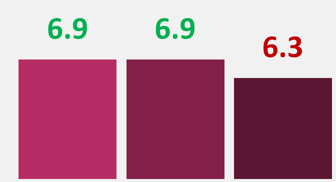
How much do you think the skills required in your industry will change in the next 10 years?

Base: Base: All Employers (Small Employer n=182, Medium Employer n=133, Large Employer n=187)
ST2a. How prepared is your organisation for where your industry and the skills required to succeed are heading in the next 10 years?

How prepared is your organisation for where your industry and the skills required to succeed are heading in the next 10 years?



PERCEIVED PREPAREDNESS



MEAN OUT OF 10

GREEN figures are significantly greater than RED figures

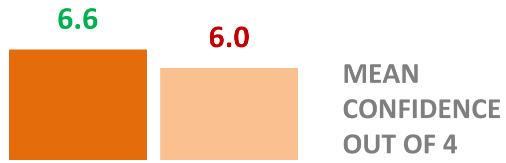
CONFIDENCE IN AVAILABILITY OF SKILLS

Currently, half of surveyed Employers (56%) feel confident that they will be able to find Workers with the right skills to help their business succeed.

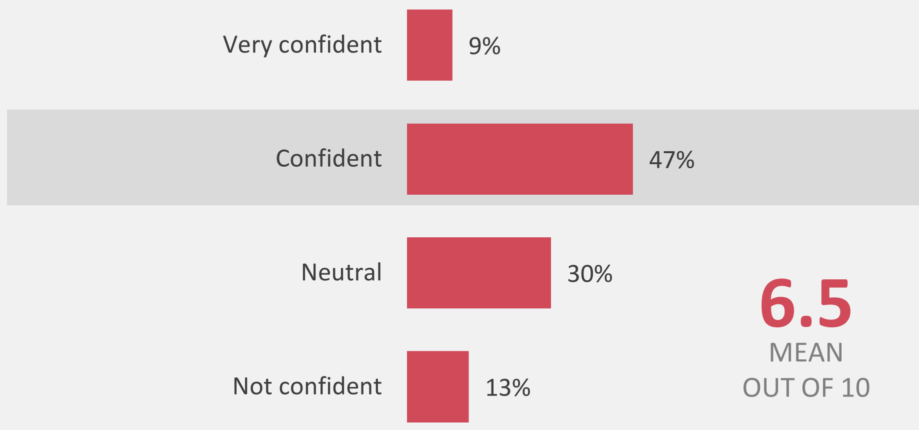
Employers outside SEQ are significantly less confident that they will be able to find employees with the right skills.

Confidence in finding employees with the right skills is similar across industries.

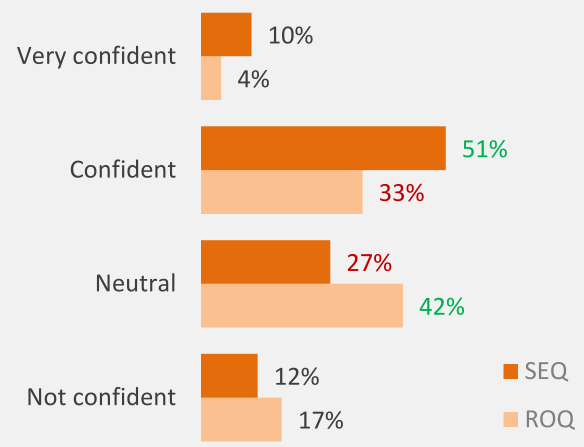
CONFIDENCE TO FIND THE RIGHT SKILLS?
BY REGION



CONFIDENCE IN ABILITY TO FIND EMPLOYEES WITH THE RIGHT SKILLS



CONFIDENCE IN ABILITY TO FIND EMPLOYEES WITH THE RIGHT SKILLS
BY REGION



Base: All Employers (n=502)
ST2b. When hiring, how confident are you that you will be able to find employees who have the right skills to help your organisation succeed?

FUTURE CONFIDENCE IN AVAILABILITY OF SKILLS

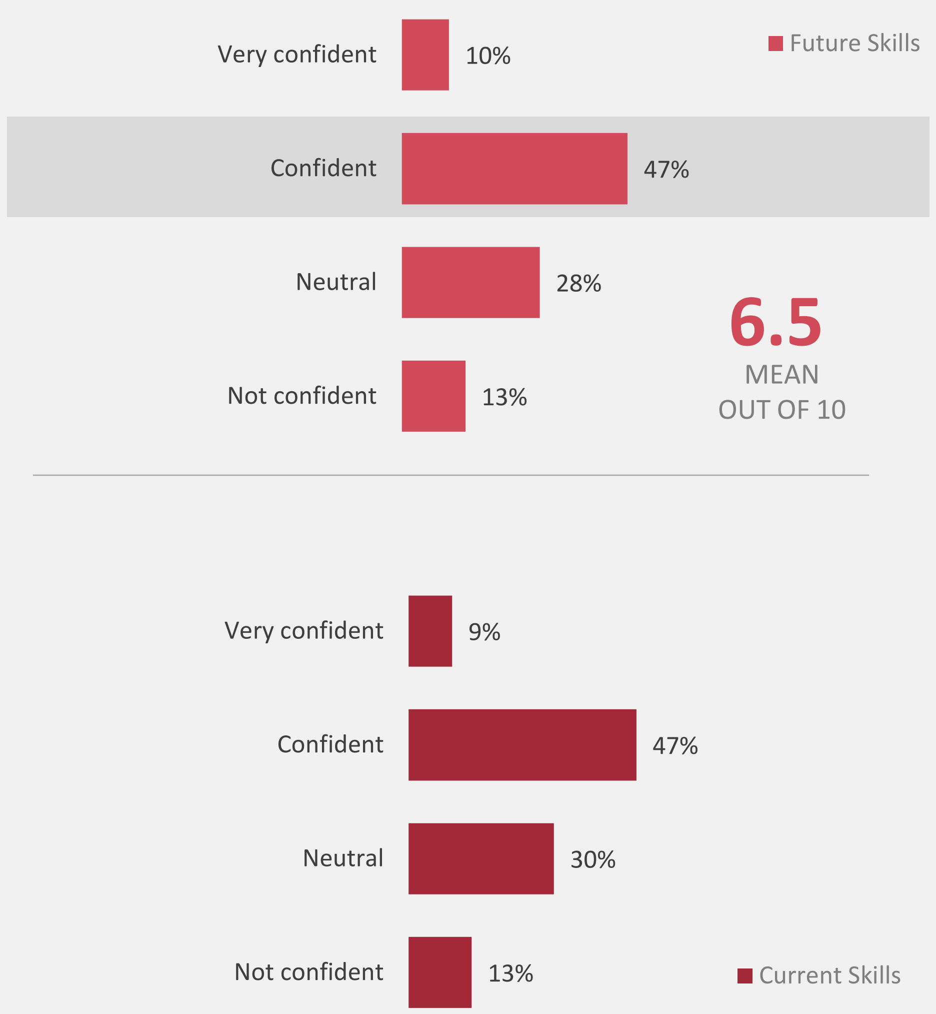
Surveyed Employers' confidence that in 10 years they will be able to find employees who have the right skills for their business and where the industry is heading, is **highly similar** to their current levels of confidence.

From the qualitative research it was evident that both Employers and especially Workers struggled to envisage their future needs and behaviour when it came to the future of work.

"10 years is so far away! I honestly don't picture that far in advance" Digital Nomad Worker

Suggesting that Employers are not thinking in depth about the future and are grounded in the now.

CONFIDENCE IN ABILITY TO FIND EMPLOYEES WITH THE RIGHT SKILLS IN THE NEXT 10 YEARS



Base: All Employers (n=502)
ST2c. How confident are you that in the next 10 years you will be able to find employees who have the right skills for your organisation and where the industry is heading?
ST2b. When hiring, how confident are you that you will be able to find employees who have the right skills to help your organisation succeed?

THE EMPLOYER DILEMMA

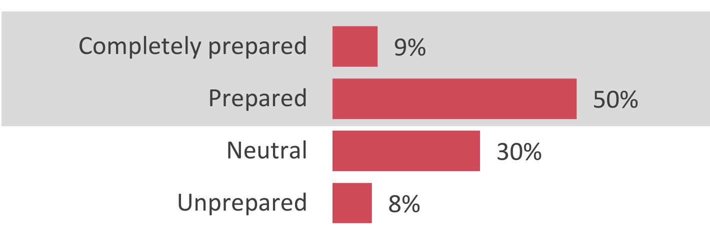
The majority (59%) of Employers feel largely well prepared for the future and where their industry is heading.

However, half (56%) of Employers currently find it challenging finding employees with the right skills and have similar levels of confidence for the future.

In addition, more than six in ten (66%) Employers expect that skills will change moderately to a lot in the next 10 years.

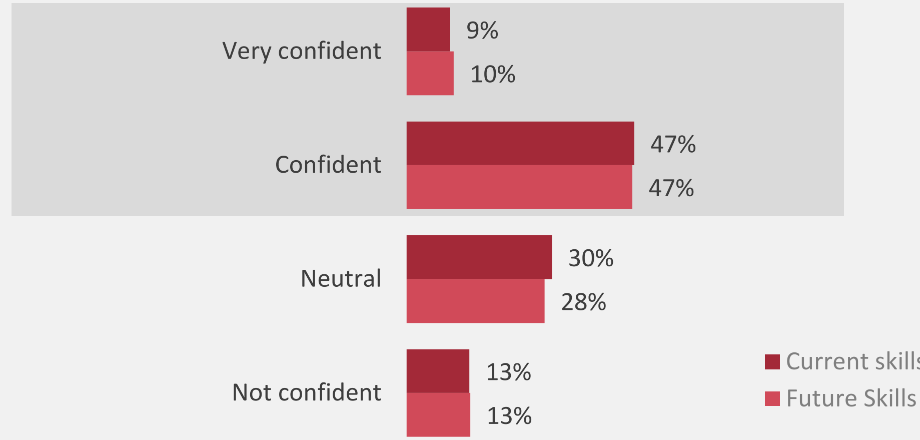
These discrepancies in Employers' future perceptions and expectations highlight a disconnect between Employers' current experiences and future outlook.

How prepared is your organisation for where your industry and the skills required to succeed are heading in the next 10 years?

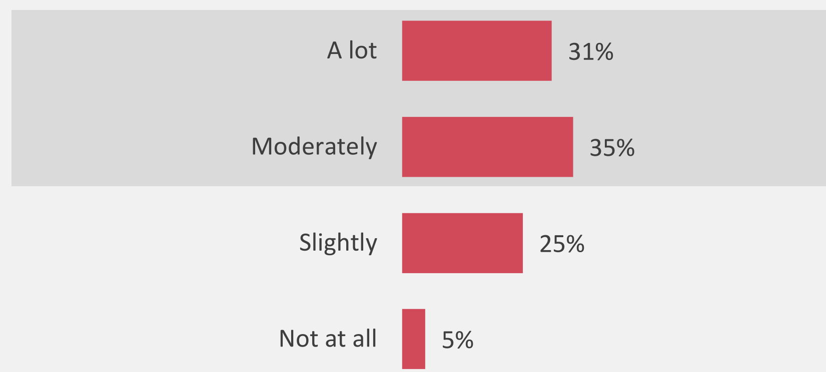


Base: All Employers (n=502)
ST2a. How prepared is your organisation for where your industry and the skills required to succeed are heading in the next 10 years?
ST1. How much do you think the skills required in your profession/ industry will change in the next 10 years?

Confidence in ability to find employees With the right skills in the next 10 years



How much will the skills required in your industries change in the next 10 years?



ST2c. How confident are you that in the next 10 years you will be able to find employees who have the right skills for your organisation and where the industry is heading?
ST2b. When hiring, how confident are you that you will be able to find employees who have the right skills to help your organisation succeed?

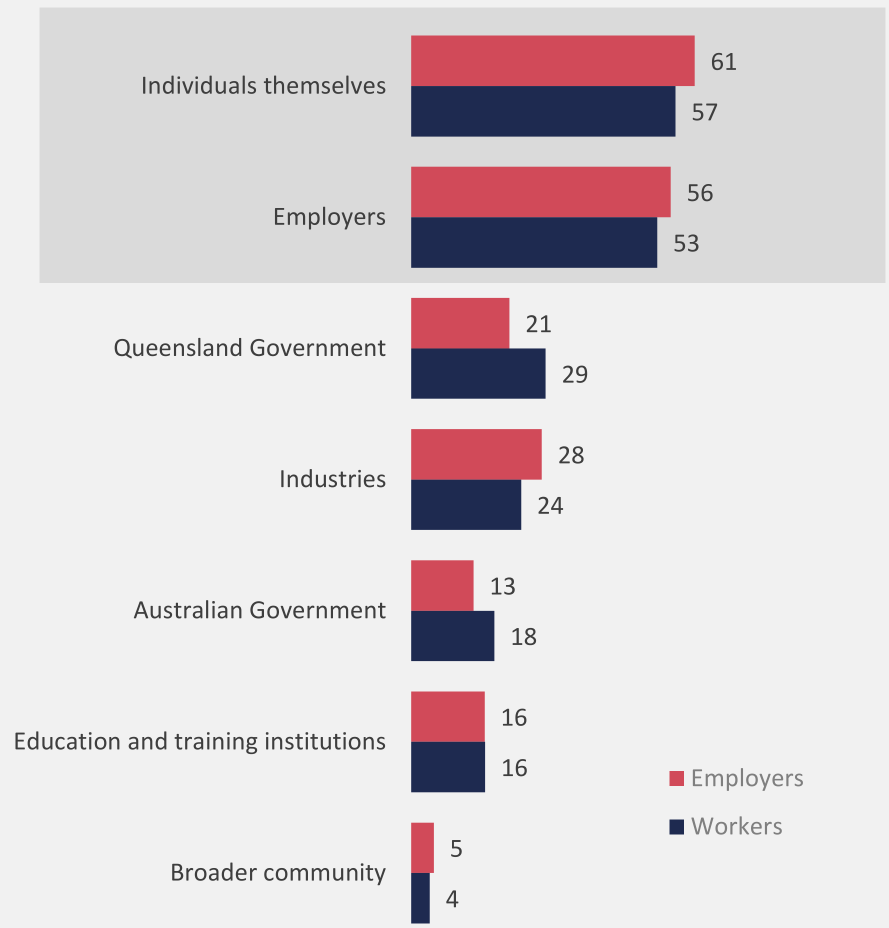
SUPPORTING QUEENSLAND WORKERS

Both Employers and Workers surveyed feel that it is Workers themselves as well as Employer's responsibility in ensuring Queenslanders have the skills and training needed for employment in the future. These findings are similar across industries.

While both Employers and Workers place the responsibility on themselves for ensuring future skills, the contradictions, misalignments and their focus on the present (explored earlier within this report) suggest that these groups are not united in what they think the Future of Work will entail. Therefore **guidance is needed from a third party to *inform* what the future of work will entail in regards to the skills and training needed, in order to ensure future success.**

This crucial role of providing guidance to Employers and Workers is where the Queensland Government can be of the greatest support.

RESPONSIBLE FOR SUPPORTING WORKERS IN HAVING THE SKILLS AND TRAINING NEEDED FOR FUTURE EMPLOYMENT
RANK SCORE SHOWN



Base: All respondents (Workers n=1515, Employers n=502)
SUP1/ST11. Who do you feel should be responsible for supporting Queenslanders in having the skills and training needed for employment in the future?
Rank 1, 2, 3, with 1 being the most responsible

OPPORTUNITIES FOR THE QUEENSLAND GOVERNMENT

The disparity between Employers and Workers outlook and preparedness for the future also suggests that guidance is needed.

When it comes to the changing nature or work, both Workers and small and medium Employers want to be able to look to the Queensland Government for **guidance**.

In particular they desire guidance on the **job and work opportunities** that will be growing and available in the next 10 years, and guidance on **what skills will be required** for future workplace and employment success.

> *"Because we don't know what skills or employment is going to be available or even needed in 10+ years time"*
> *Brisbane, Standard Worker*

Workers also seek guidance on **how to navigate the changeable and uncertain landscape** of the future of work, and support in transitioning and coping with this change.

> *"It's really just about preparing people and making sure that people are adaptable" Bundaberg, Small – Medium Employer*

> *"Ultimately, there needs to be more funding, there needs to be more research and strategy into things like artificial intelligence" Brisbane, Large Employer*

OPPORTUNITIES FOR THE QUEENSLAND GOVERNMENT CONT'D

ALTERNATIVE WORKERS

From the qualitative research it was identified that Alternative Workers desire assistance in building **recognition for their working arrangements** among more traditional business institutions.

> *"In the interviews, they always say, 'We want people who worked at Woolworth's, or McDonald's.' Show that you can work in a team. And I've successfully sort of run my own business, but that's seen as irrelevant experience … people will value people who have had a boss and been in a hierarchy."* Brisbane, Gig Economy Worker

Alternative Workers want **support in 'normalising' their working arrangements** among financial institutions (to reduce their current challenge of securing mortgages and other 'typical' financial services).

> *"We went to St George Bank, and said this is what we earn … why can't we get a car loan? They said no it's not going to happen … eventually the four of us were able to get loans, but under conditions. They never considered Uber as an income."* Brisbane, Gig Economy Worker

Normalisation within government services is also desired, as many **struggle with government services** such as Newstart and Centrelink accepting their working arrangements and income patterns.

> *"The Australian tax office even stated publicly, and through the media, that Uber will never be considered a stable income, and will never be considered a serious income by the Australian tax office."* Gold Coast, Gig Economy Worker

On a more broad scale, Alternative Workers want greater acceptance and recognition within Employers and industries. Some younger Alternative Workers commented that they were struggling to enter more 'standard' working arrangements due to Employers not recognising their experience.

> *"What would be of great help is to have access to apprenticeships and internships that aren't just reserved for the more commonly accepted occupations."* Digital Nomad Worker

OPPORTUNITIES FOR THE QUEENSLAND GOVERNMENT CONT'D

ALTERNATIVE WORKERS

Alternative Workers also desired support from the Queensland Government in **navigating emerging working arrangements**, in regard to:

- Support in developing **generalist small business skills**
- **Greater regulatory protection** in regard to payment terms and periods to assist contract/freelancers and Gig Economy Workers receiving payment for their work.
- **Greater infrastructure** to support alternative work in the form of fast internet as well as creative skills, technology and innovation hubs across the state.

"It would be great if the Queensland Government developed a universal contract for companies to use when using outside consultants. That would protect the freelancers against late payments and overworking" Digital Nomad Worker

"Making sure that internet access is available state wide, in public spaces, buses, trains etc so the formality of sitting behind a desk to do work is broken. Even provide work stations in suburban areas where those that don't operate from an office can have some sort of commercial interaction with people" Digital Nomad Worker

"I know the state government has been running some subsidized marketing courses for small Employers. I haven't seen anything from small business about inspiring and coaching people to take that leap into small business. I think there's a gap there" Gold Coast, Gig Economy Worker

"I feel legislation wise, more protections for people in Gig Economies, and for people in a field that is transitioning to a Gig Economy, like I know with transcription, sometimes you can make way less than minimum wage because of the way the company pays the person by line, and they give you short reports you are not going to be earning enough by hour" Brisbane, Gig Economy Worker

APPENDIX

DEFINING INDUSTRY

Industry classifications captured in this social research project are based on the ANZSIC classifications.

The questionnaires used the full ANZSIC classifications of industries, however for analysis purposes certain industry classifications were combined to provide sufficient sample size.

The decision on industries to combine was determined by the similar nature of the industries.

The following industries were combined:

Financial & Insurance Services	+	Rental, Hiring & Real Estate Services	=	Financial & Real Estate Services
Tourism	+	Food & Beverage Services	=	Tourism, Food & Beverage Services
Agriculture, Forestry & Fishing	+	Mining	=	Agriculture, Forestry, Fishing & Mining

TECHNOLOGY TYPES DEFINED

Performance monitoring technology
When business or staff performance is monitored / measured by technology

Integration technology
When different parts / functions of a business are streamlined into one or more systems

Efficiency technology
When technology saves time / reduces costs / reduces the effort involves in completing task / processes

Task automation technology
When a task/ element of a job has been replaced by technology

Process / job automation technology (full automation)
When a whole process, which was previously a job is replaced by technology

Safety technology
When technology reduces risk of injury therefore making the workplace / worksite safer

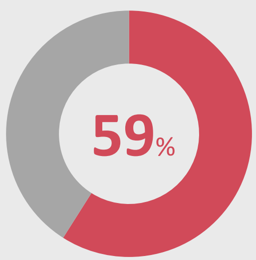
Communication technology
When technology is utilised to make communicating or knowledge sharing easier / more efficient / more effective

Data analytic technology
The utilisation of large data sets to inform organisational actions / strategy (e.g. big data, data mining)

Capability / business expansion technology
Technology which introduces new capabilities and market opportunities to your business

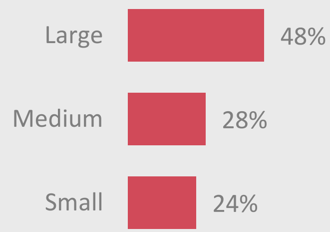
PROFILE OF EMPLOYERS WHO OFFER REMOTE WORKING ARRANGEMENTS

EXTENT OF REMOTE WORKING

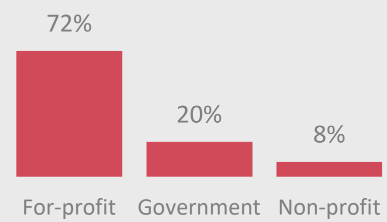


of Employers offer remote working arrangements

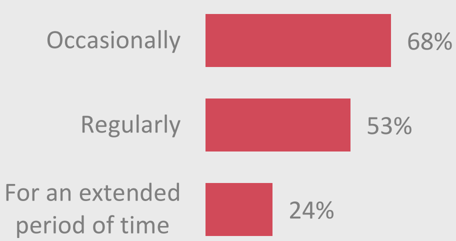
BUSINESS SIZE



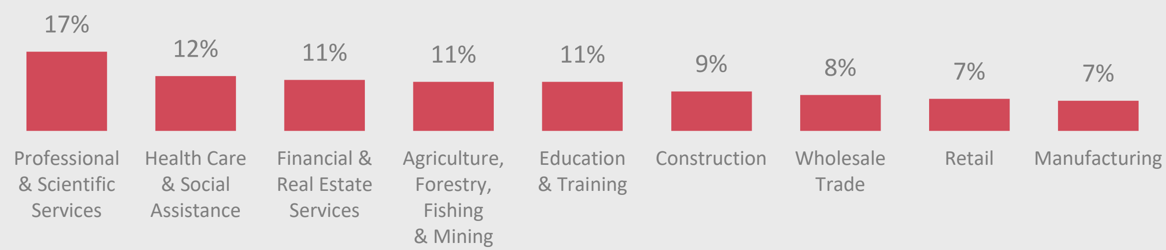
BUSINESS TYPE



Have employees who work remotely…



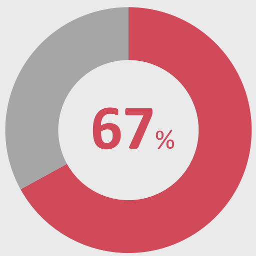
INDUSTRY



Base: Employers who offer remote working arrangements (n=298)

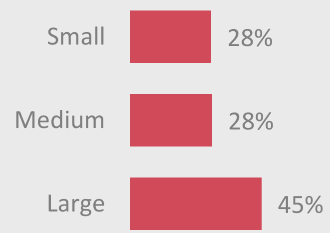
PROFILE OF EMPLOYERS WHO HIRE ALTERNATIVE WORKERS

EXTENT OF ALTERNATIVE WORK

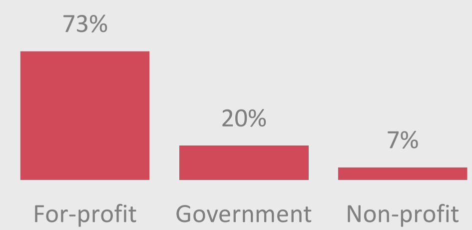


of Employers have hired an Alternative Worker in the past 3 years

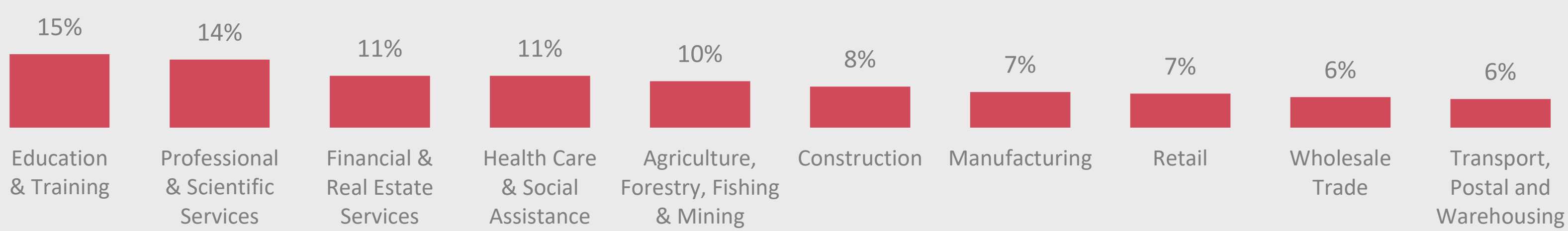
BUSINESS SIZE



BUSINESS TYPE



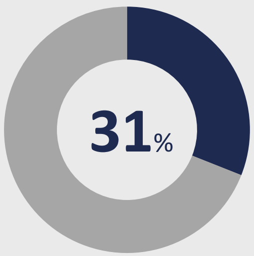
INDUSTRY



Base: Employers who hire Alternative Workers (n=340)

PROFILE OF REMOTE WORKERS

EXTENT OF REMOTE WORKING



of Workers work remotely at least some of the time

FREQUENCY

Regularly work remotely	37%
Sometimes work remotely	63%

JOB TYPE

Management	36%
Professional	26%
Blue collar	16%
Clerical or admin	13%
Sales	6%
Community or personal service	4%

GENDER & KIDS

48% (male)

52% (female)

38% have children at home

WORK HOURS

Full-time	73%
Part-time	19%
On a casual basis	7%

AGE

Under 25	5%
25 to 34	19%
35 to 44	28%
45 to 54	18%
55 to 64	23%
65+	7%

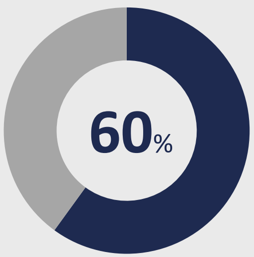
INDUSTRY

Education & Training	14%
Health Care & Social Assistance	13%
Professional & Scientific Services	10%
Financial & Real Estate Services	9%
Public Administration Services	8%
Retail	8%
Construction	8%
Transport, Postal and Warehousing	7%

Base: All Remote Workers (n=388)

PROFILE OF WORKERS WHO HAVE UNDERTAKEN TRAINING IN PAST 3 YEARS

EXTENT OF PREVIOUS TRAINING

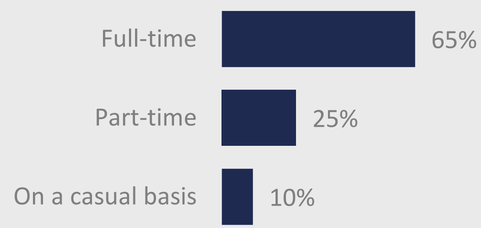


of Workers have undertaken formalised training in the past 3 years

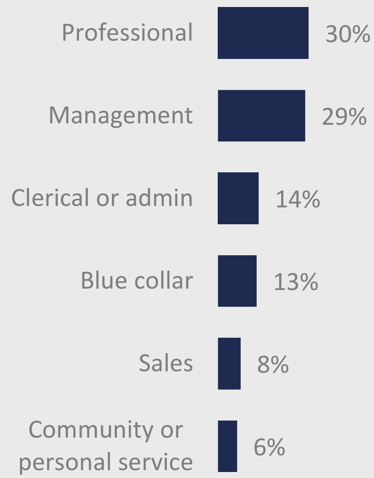
GENDER

37% 63%

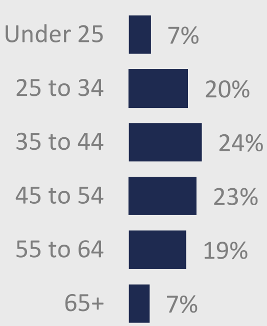
WORK HOURS



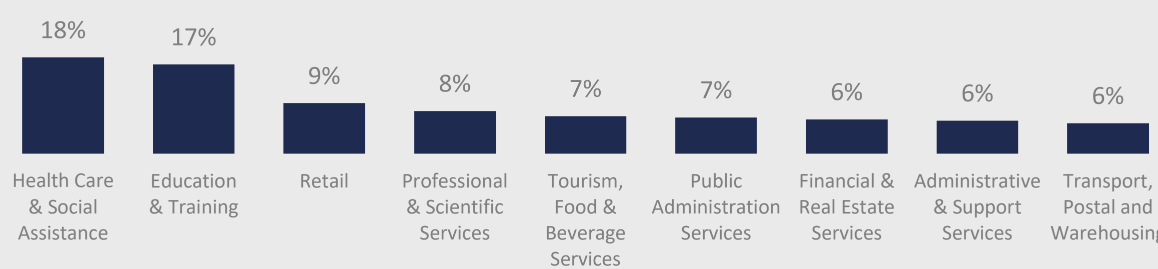
JOB TYPE



AGE



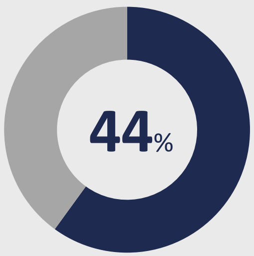
INDUSTRY



Base: Workers who have undertaken training in the past 3 years (n=904)

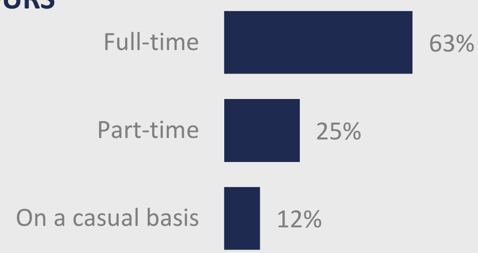
PROFILE OF WORKERS WHO PLAN TO UNDERTAKE TRAINING IN NEXT 3 YEARS

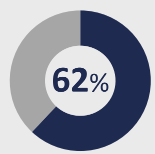
EXTENT OF FUTURE TRAINING



of Workers plan to undertake significant training in the next 3 years

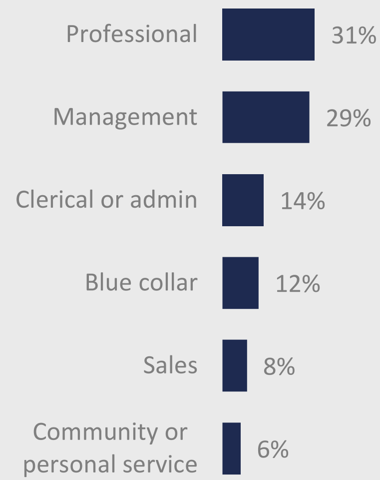
WORK HOURS





Of those who are currently or have undertaken training in the past 3 years, plan to undertake training in the next 3 years

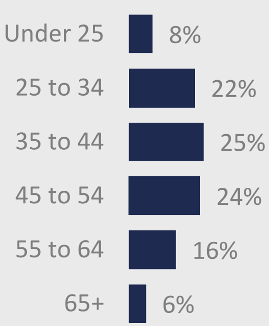
JOB TYPE



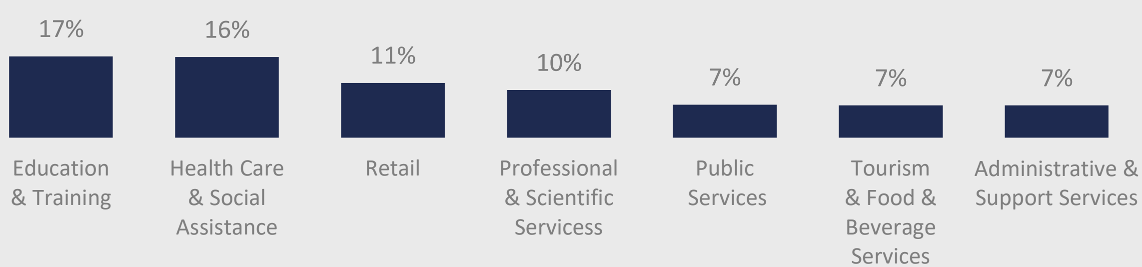
GENDER

35% 65%

AGE



INDUSTRY



Base: Workers who plan to undertake significant training or education in regards to their or future employment within the next 3 years? (n=669)

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