

An aerial photograph of the Perth city skyline at sunset. The sun is low on the left, casting a warm orange glow over the city. The skyline features several prominent skyscrapers, including the Perth Mint and the Perth City Centre. The city is situated along a river, with a bridge visible in the foreground. The overall scene is a mix of modern architecture and natural elements like trees and water.

FUTURE OF WORK

Prepared for: The Committee for Perth

Prepared by: IPSOS



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Research approach

The research sampled two key audiences: 1) WA residents via the Community Survey and 2) Perth Businesses via the CfP Member Survey.



Interviews conducted



22 min survey



1009 Online Interviews with WA residents



41 Online Interviews with Senior Business Leaders



50,000+ data points in total

WA Community Sample



Sample stratification
(Age, gender & location)



Quota control
(Age, gender & location)



Weighting
To align with ABS 2016

Ensuring a representative set of views.

WA residents across the state working, seeking work or training for work.

IN PAID EMPLOYMENT (INCL. SELF EMPLOYED)

77%

UNEMPLOYED & SEEKING PAID EMPLOYMENT

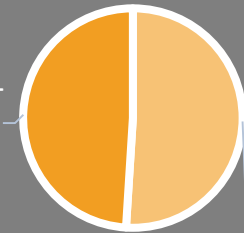
15%

IN TRAINING/EDUCATION FOR FUTURE EMPLOYMENT

8%

WA Business Sample

Senior & mid-level management
49%



CEO / GM or equivalent
51%

32% 1-100 employees

32% 101-500 employees

37% 501+ employees

ATTITUDES TOWARDS TECHNOLOGY



For most of us, life is better because of technology

What impact do you believe technology has had on life today?



■ Negative impact ■ Equally positive and negative impact ■ Positive impact

67%

Males more likely
to see technology
as positive

No difference
by age

56%

Females less likely
to see technology
as positive

No difference
metro vs. regional



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Source: Q19 Ipsos 2020 Future of Work & Study. WA community n=1,009



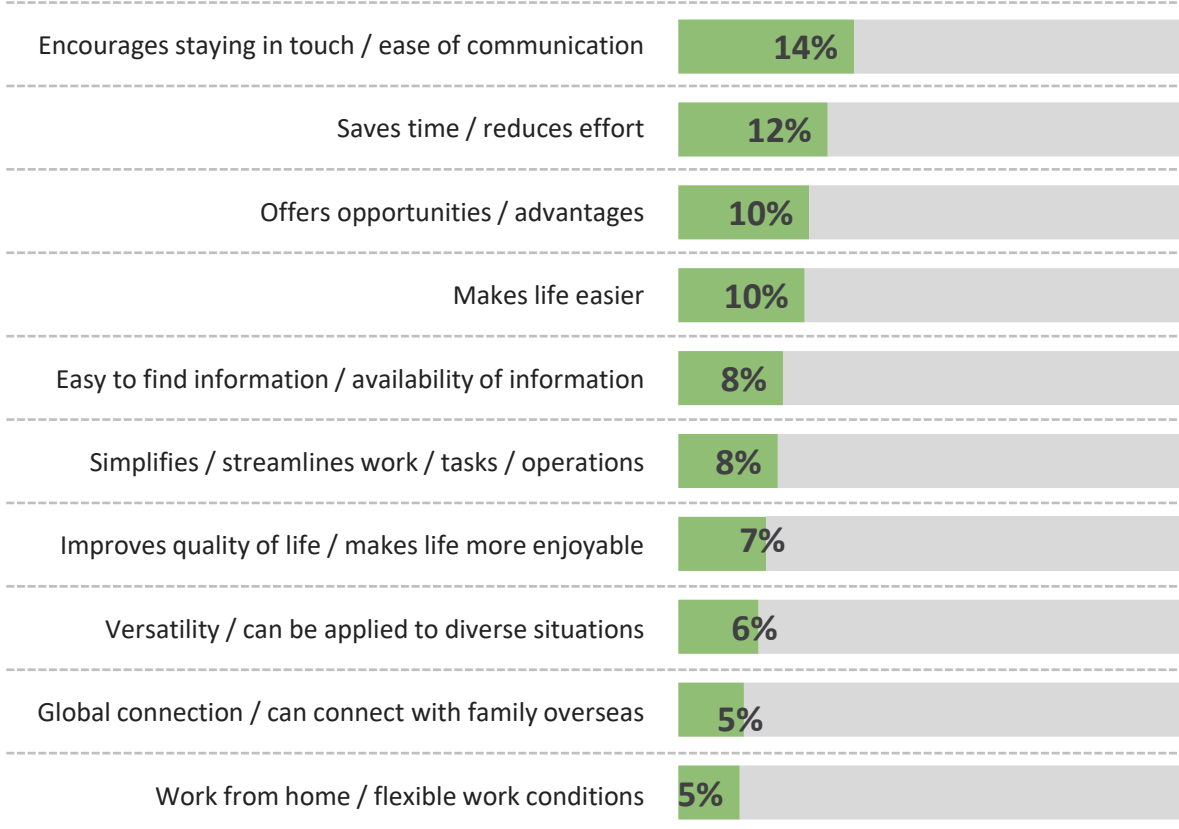
COMMUNITY

Technology keeps us connected and gives us time back

Why do you believe technology has had a positive impact on life today?



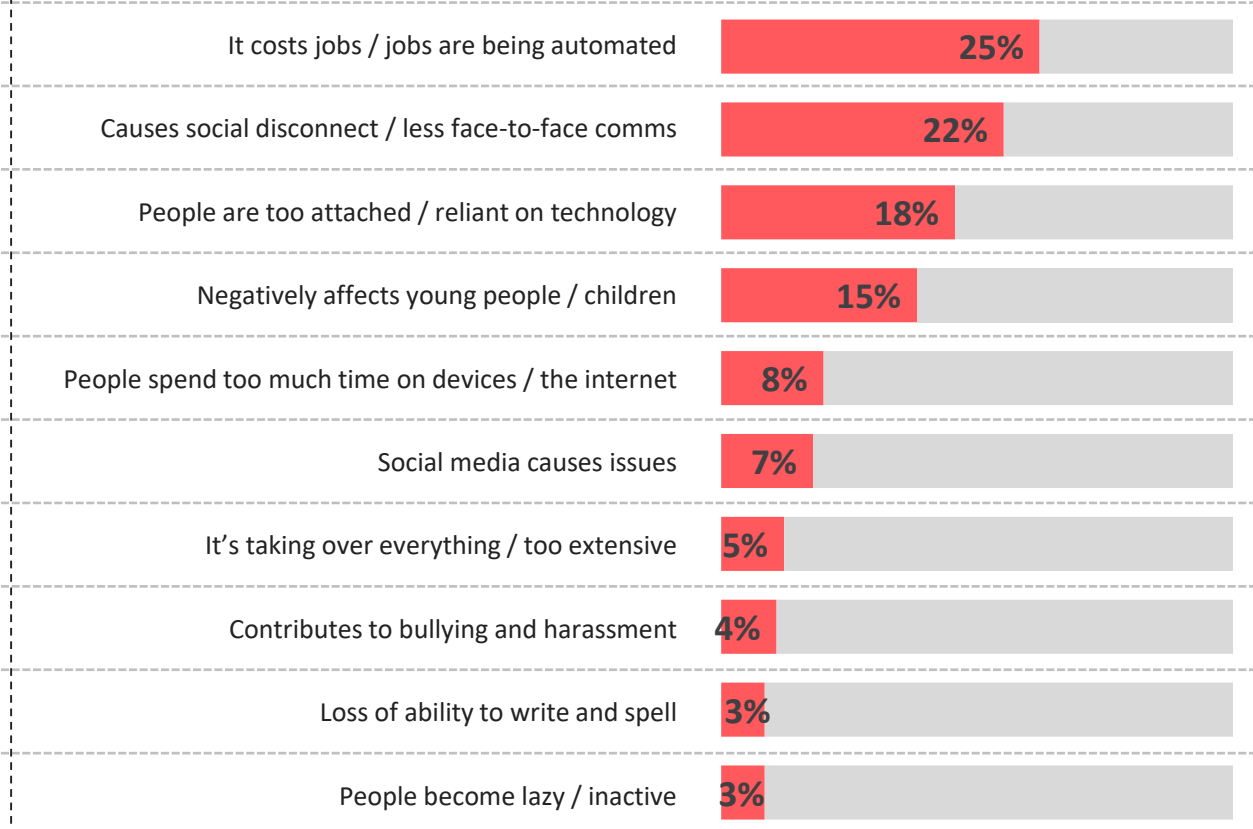
62%



Why do you believe technology has had a negative impact on life today?



8%



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Source: Q19|Q20 Ipsos 2020 Future of Work & Study. WA community n=1009; those who believe in positive impact n=600, negative impact n=90.



COMMUNITY

Jobs have been shaped by technology

But this has not necessarily been exacerbated by COVID; instead most of us see the impact of technology as declining over the last decade.

Impact technology has had on job(s)

IN THE LAST 9 MONTHS SINCE COVID-19



1-5 YEARS AGO

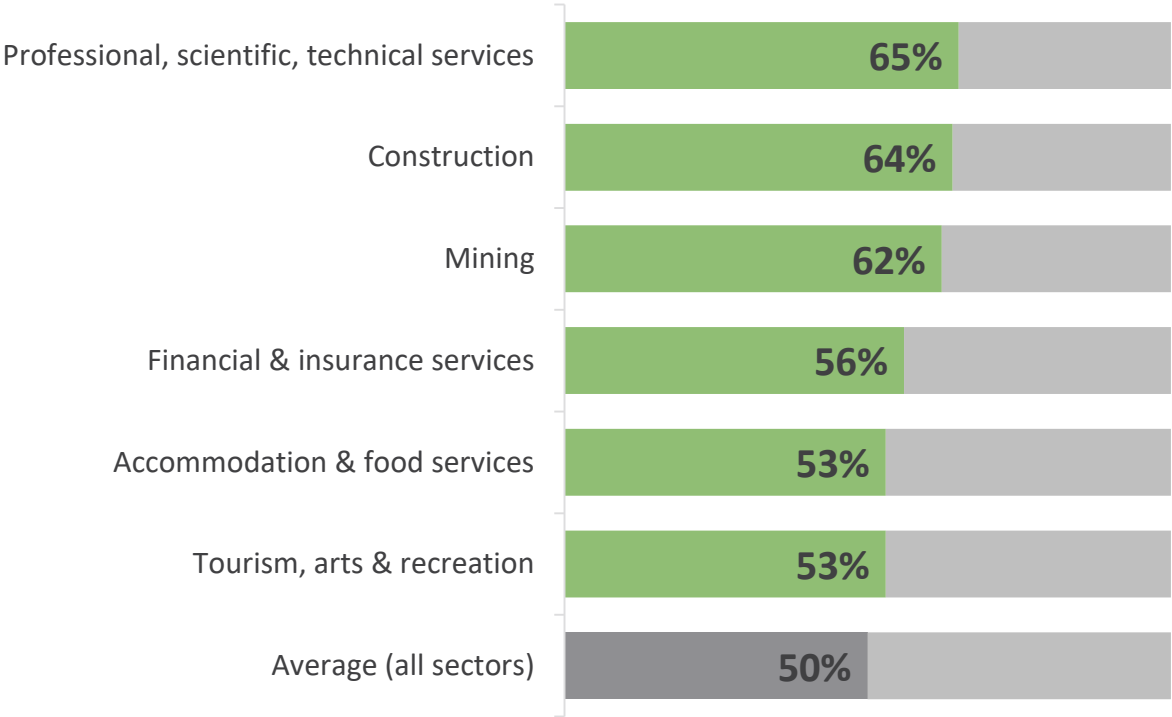


5-10 YEARS AGO



- Significantly or completely changed the way I perform my job
- Changed some of the ways I perform tasks
- No impact

Sectors most impacted over last 10 years



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Source: Q22 Ipsos 2020 Future of Work & Study. WA workforce n=796.



The perceived impact of technology on jobs is gendered

Men are more likely than women to report technology as having significantly or completely changed the way they do their jobs and the starkest difference between the genders is the impact since COVID.



IN THE LAST 9 MONTHS SINCE COVID-19



1-5 YEARS AGO



5-10 YEARS AGO



- Significantly or completely changed the way I perform my job
- Changed some of the ways I perform tasks
- No impact



IN THE LAST 9 MONTHS SINCE COVID-19



1-5 YEARS AGO



5-10 YEARS AGO



- Significantly or completely changed the way I perform my job
- Changed some of the ways I perform tasks
- No impact



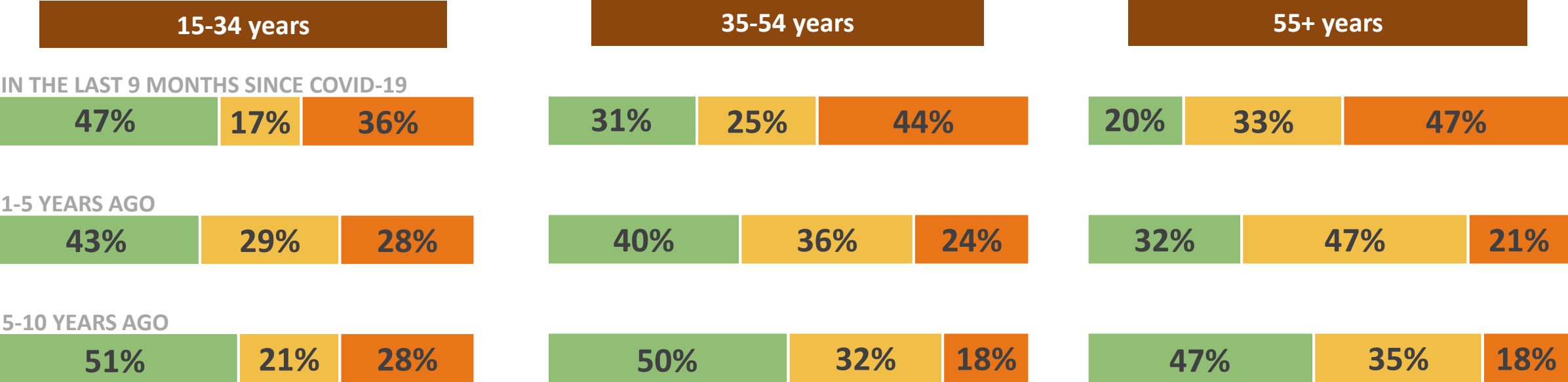
© 2020 Ipsos.

Source: Q22 Ipsos 2020 Future of Work & Study. WA Male workforce n=347; Female workforce n=449.



Digital natives are the most likely to feel the impact of technology

It is the oldest cohort of WA workers that is least likely to see technology as having significantly or completely changed how they do their job while the youngest cohort is the most likely.



- Significantly or completely changed the way I perform my job
- Changed some of the ways I perform tasks
- No impact



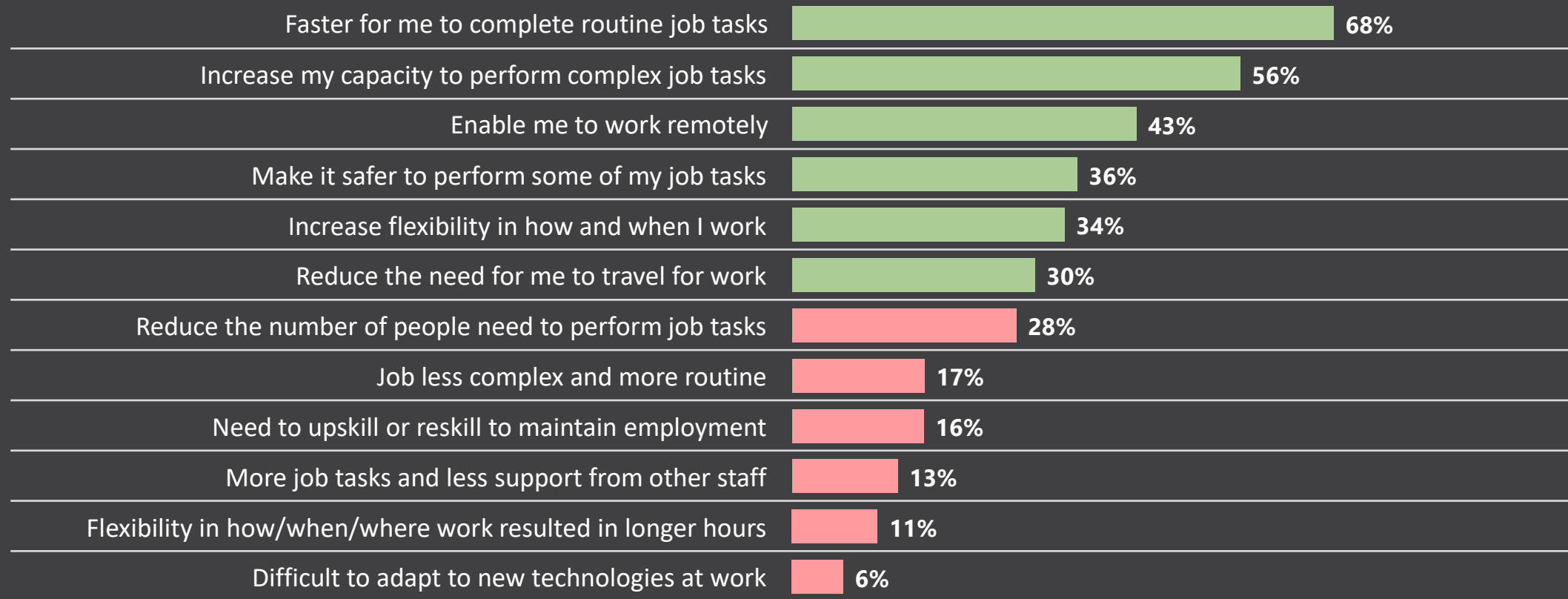
© 2020 Ipsos.

Source: Q22 Ipsos 2020 Future of Work & Study. WA workforce n=796.



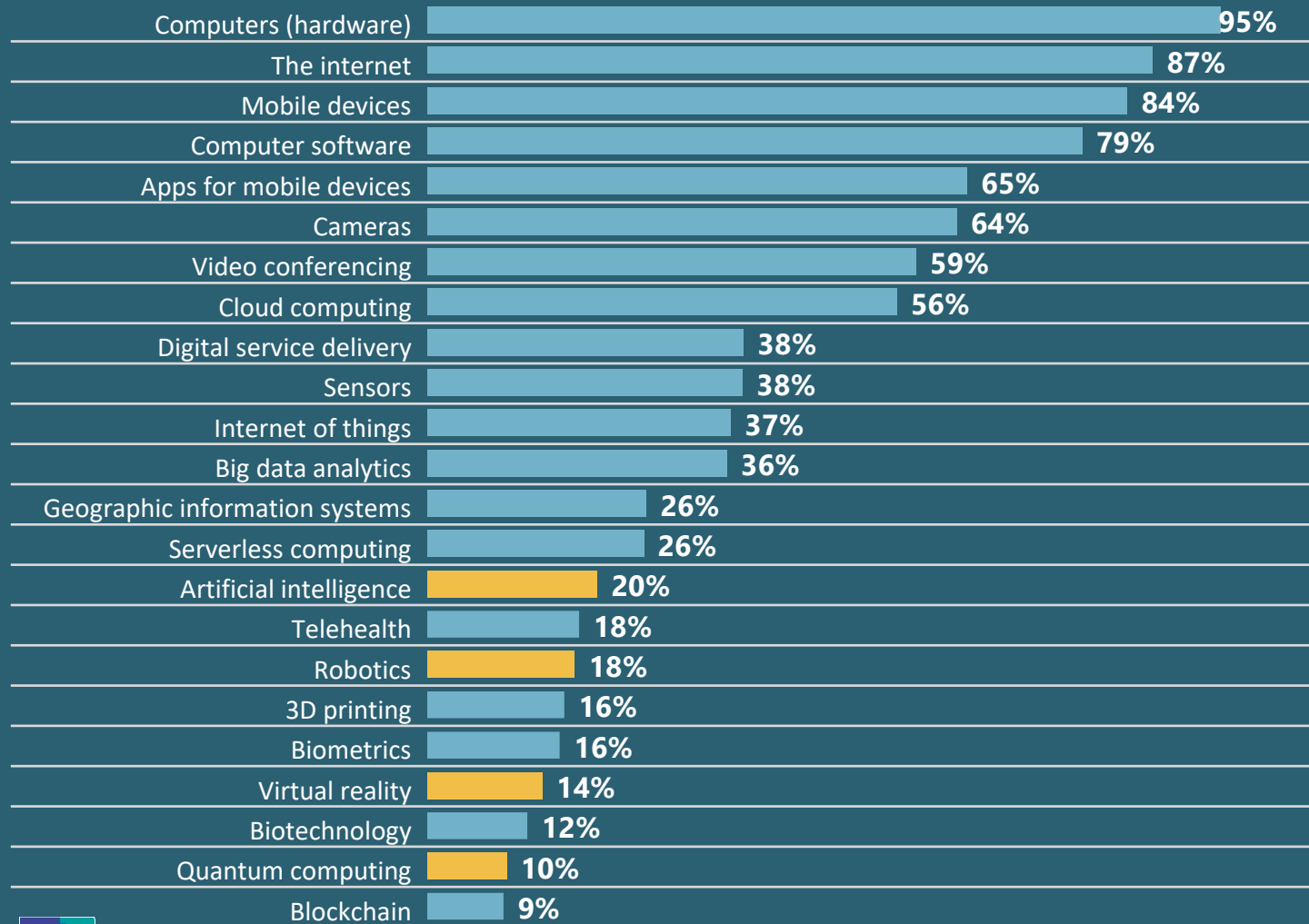
Like with life overall, technology has a mostly positive impact on work

Past impact of technology in the workplace



Reflecting the types of technology that have been adopted in WA to date

Adoption rates of more disruptive technology are relatively low in WA – or awareness is low among the WA workforce.



Mining

68%
Sensors

63%
Big data
analytics

57%
Geographic
info
systems

42%
Robotics



Health care & social assistance

61%
Tele-
health



Professional, scientific & technical services

74%
Cloud
computing

30%
Robotics

27%
Bio-
technology

25%
Quantum
computing



Education & training, and Manufacturing

28%
Robotics



© 2020 Ipsos.

Source: Q21 Ipsos 2020 Future of Work & Study. WA workforce n=796.

Technology helps men with the complex and women with the routine



TECHNOLOGY HAS MADE IT FASTER FOR ME TO COMPLETE ROUTINE JOB TASKS



TECHNOLOGY HAS INCREASED MY CAPACITY TO PERFORM COMPLEX JOB TASKS



While the older cohort is experiencing more of the negatives from technology



15-34 years



35-44 years



55+ years

Technology has reduced the number of people needed to perform job tasks

24%

25%

43%

I have more job tasks and less support from other staff as a result of technology

9%

14%

21%

Flexibility in how, when and where I work has resulted in me working longer hours

9%

10%

17%

THE IMPACT OF COVID-19



Casuals are most impacted by COVID-19

Nearly three-in-four casuals have had their job negatively impacted during the pandemic.



54%



of full-time and part-timers
were impacted



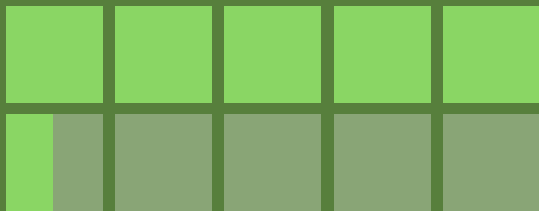
74%



of casuals were impacted



60%



of sole traders and SME owners
were impacted



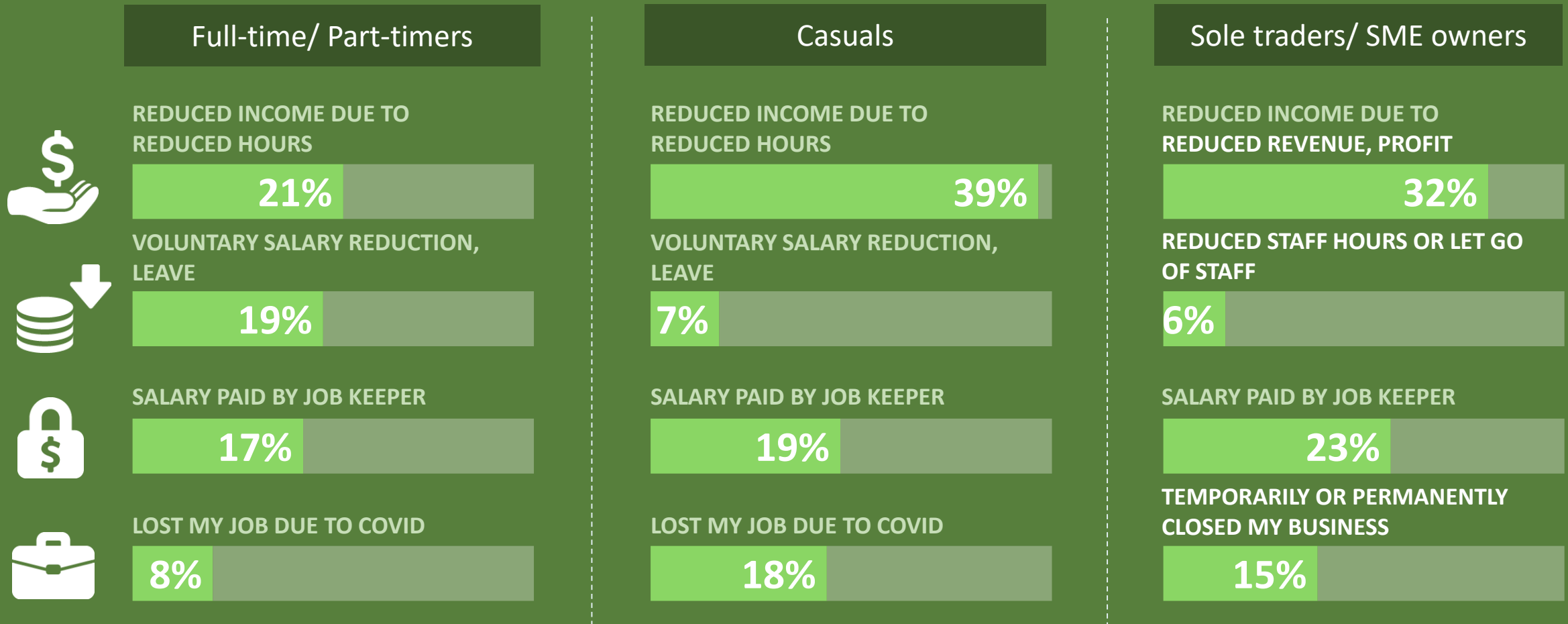
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Source: SQ6|SQ7 Ipsos 2020 Future of Work & Study. FT/PT n=651; Casual n=79, Sole traders/SMEs n=66.



FT/PT workers experienced more voluntary measures

While casuals experienced mostly reduced income/hours or total job loss.



Business also favoured voluntary measures and is optimistic about the future

How business managed the pandemic...

ENCOURAGED LEAVE, VOLUNTARY
SALARY REDUCTIONS



ACCESSED JOB KEEPER



REDUCED STAFF HOURS TO
MANAGE COSTS



LET GO OF STAFF TO MANAGE
COSTS



How businesses expect their FTE workforce to change in the future ...

THE NEXT 6 MONTHS



THE NEXT 1-5 YEARS



THE NEXT 5-10 YEARS



- Significantly decrease
- Somewhat decrease
- Stay the same
- Somewhat increase
- Significantly increase

And there is still a moderate appetite for risk

Despite the economic shock of COVID-19, there has only been a moderate decline in ratings from 2018.

"I would be happy to take risks to enhance my economic standing" - Agree

40% (2020)



45% (2018)

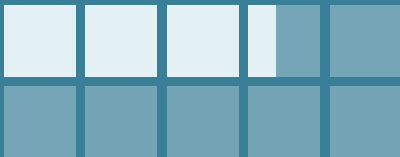


"The rewards of owning a business are higher than the risk" - Agree

28% (2020)



33% (2018)



Still, COVID brings a heightened sense of instability for the workforce

And this is exacerbated among casual workers.

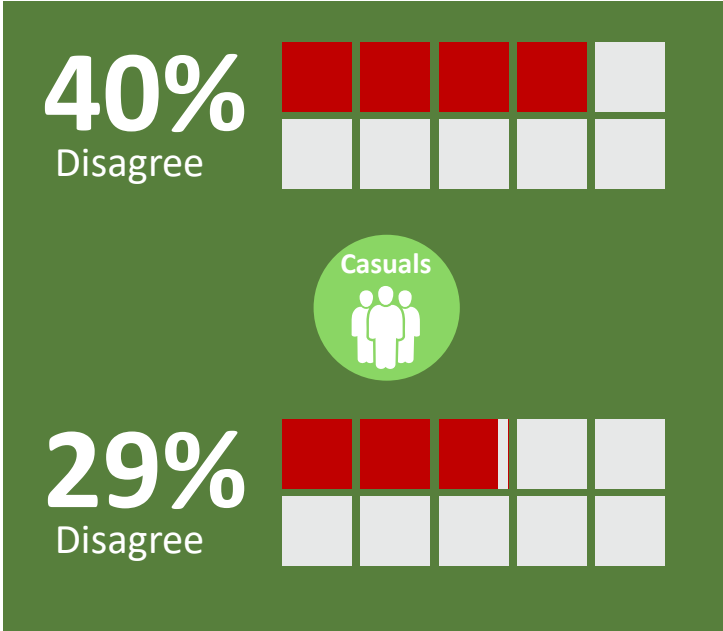
FEEL SECURE IN MY CURRENT JOB(S)



FELT SECURE IN MY JOB(S) 9 MONTHS AGO BEFORE COVID-19



■ Disagree ■ Neither agree nor disagree ■ Agree



The older cohort feels less secure since COVID

COVID-19 has reversed the trend where previously, job security increased with age.

15-34 years



Feel secure
in their
current job

77%

Felt secure
before
COVID

73%

35-44 years



66%

76%

55+ years



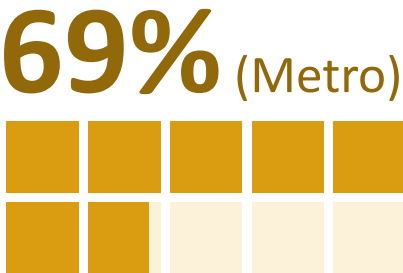
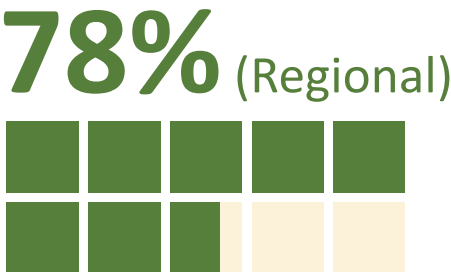
63%

81%

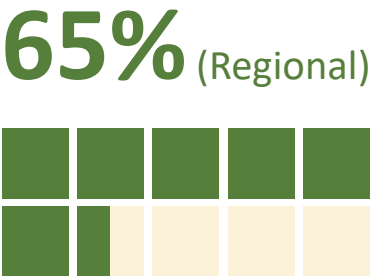
Regional workers feel more secure in their jobs

Because they feel more prepared and more confident they will be working in the same industry or a similar role in five years. And if not, they believe there are plenty of jobs available for people with their skills.

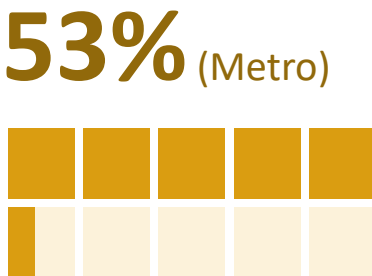
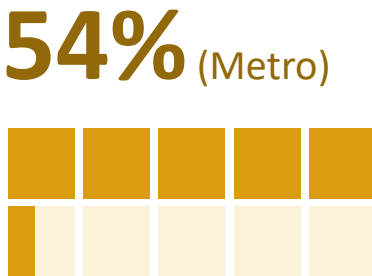
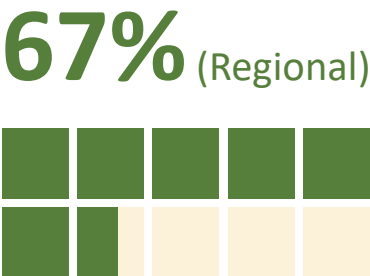
“Feel secure in my current job” - Agree



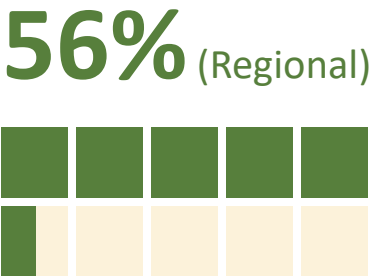
“I feel prepared for the changes happening in my industry” - Agree



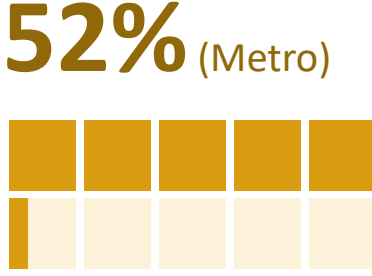
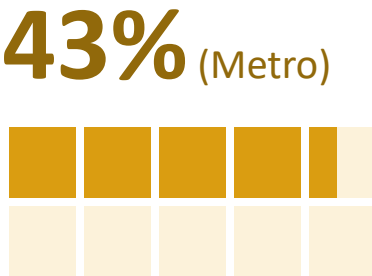
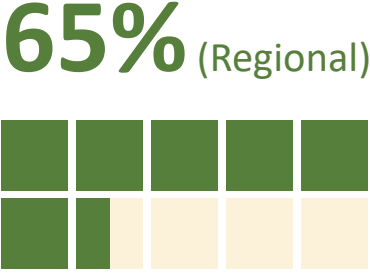
“I will be working in the same industry in 5 years” - Agree



“There are plenty of jobs available for people with my skills” - Agree



“I will be working in a similar role in 5 years” - Agree



The COVID-related increase in WFH brings pros and cons

WFH peaked during the height of the WA restrictions and things haven't returned to "normal" yet. For those who work from home, the impact is mixed but pros do outweigh cons.

How often did/do you work from home...

9 MONTHS AGO BEFORE COVID-19



DURING PHASE 1 TO 3 OF WA'S COVID-19 RESTRICTIONS



RIGHT NOW



■ Never ■ 1-2 days a week ■ 3-4 days a week ■ 5 or more days a week

Those who work from home believe that they...

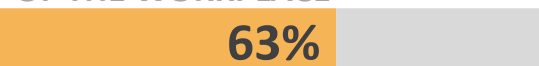
SAVE TIME BY NOT HAVING TO COMMUTE



CAN ACHIEVE A BETTER WORK-LIFE BALANCE



MISS THE SOCIAL INTERACTION OF THE WORKPLACE



MORE PRODUCTIVE AT HOME



FIND IT HARD TO "SWITCH OFF" FROM WORK



HARD TO MAKE NEW CONTACTS



HAVE LIMITED OR LESS ACCESS TO THE RESOURCES I NEED



HARD TO LEARN NEW SKILLS



FEWER DISTRACTIONS AT HOME



HAVE LIMITED OR SUBOPTIMAL SPACE TO WORK



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Source: Q14|Q15 Ipsos 2020 Future of Work & Study. WA workforce n=796; Those working from home n=408.



COMMUNITY

**BEING PREPARED FOR
FUTURE CHANGES:
THE WORKFORCE**



The impact of technology on work is expected to increase

Especially in the financial and insurance services, and professional, scientific and technical services sectors.

Expected impact of technology in the future

Sectors expected to be most impacted in the future

IN THE NEXT 6 MONTHS



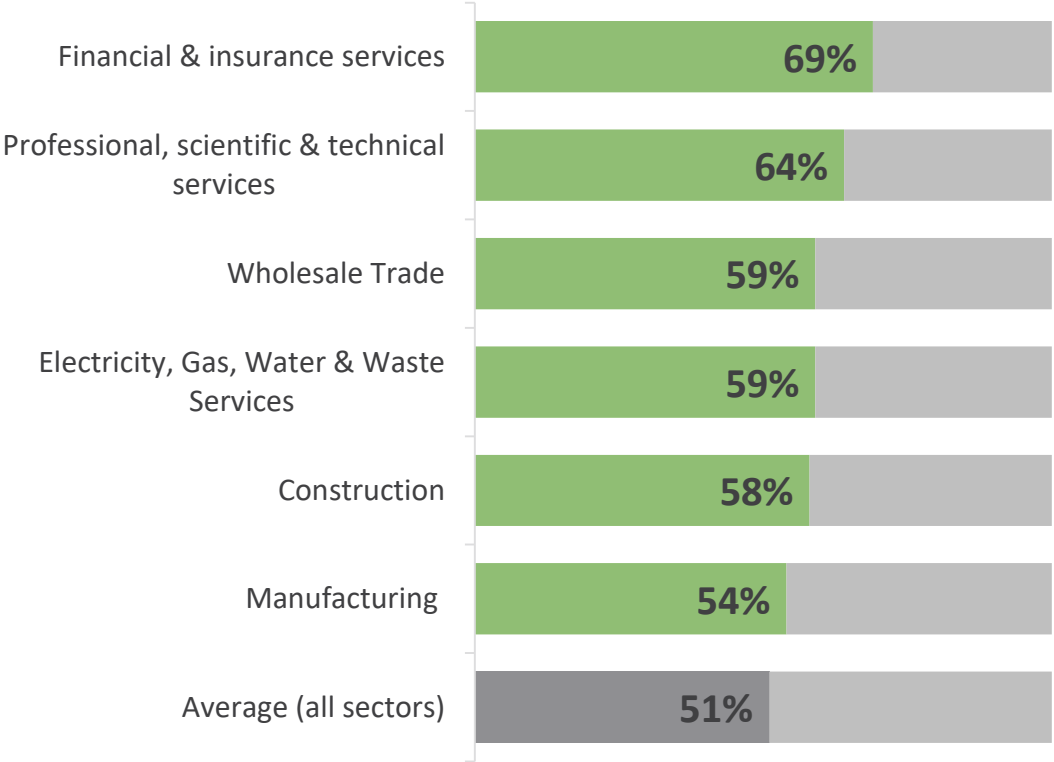
IN THE NEXT 1-5 YEARS



IN THE NEXT 5-10 YEARS



- Significantly or completely change the way I perform my job
- Change some of the way I perform some tasks
- No impact

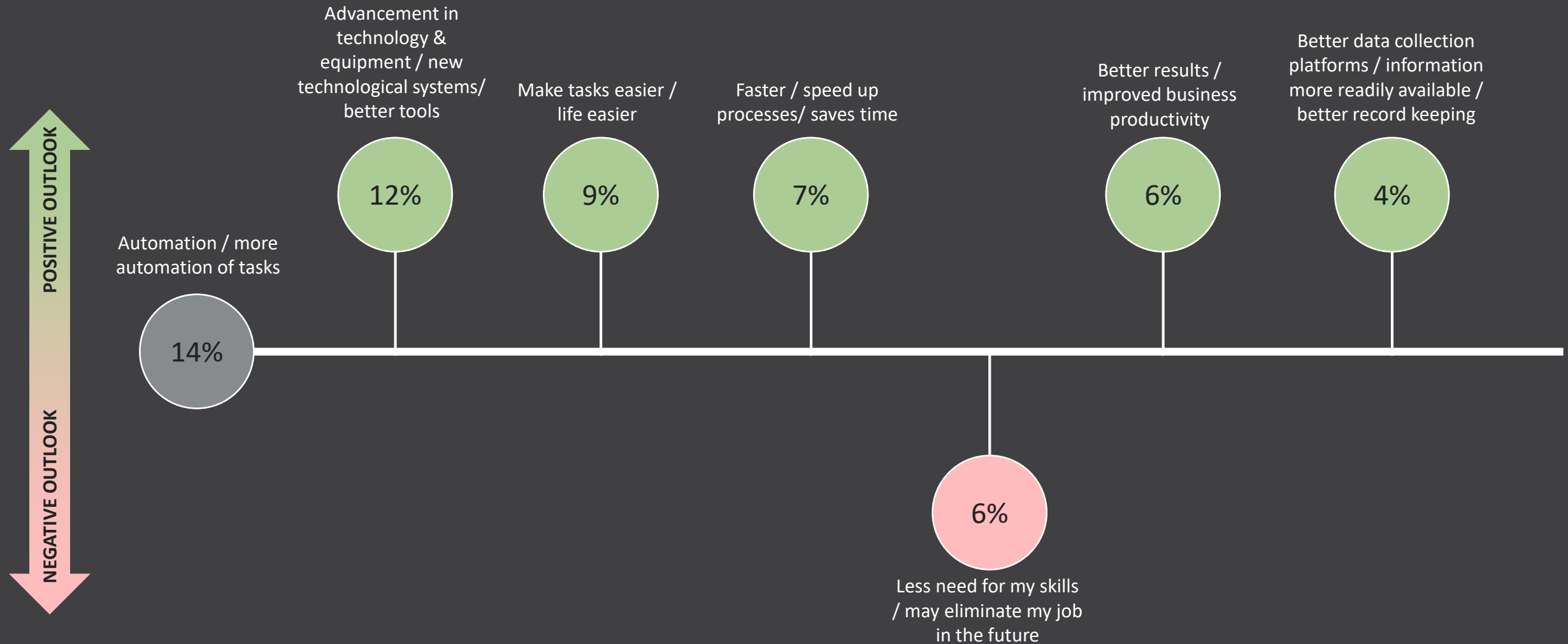


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Source: Q25 Ipsos 2020 Future of Work & Study. WA workforce n=796.



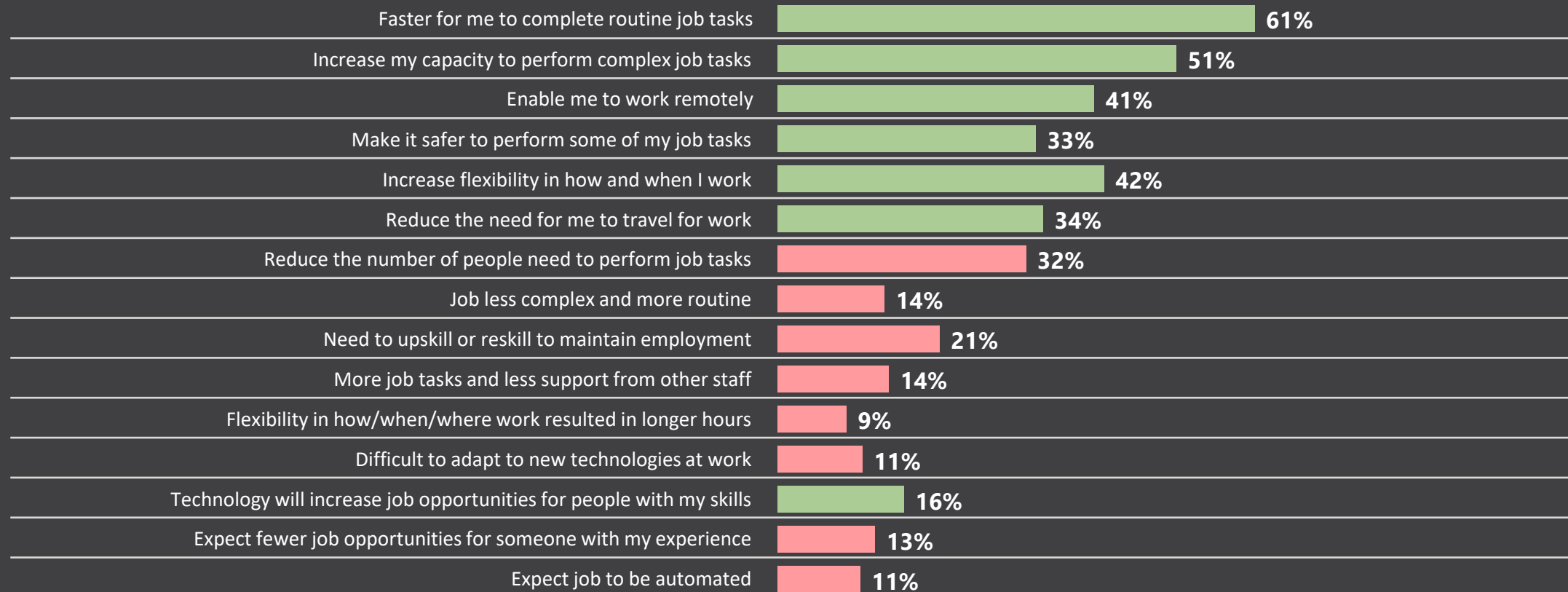
And top of mind, most of the anticipated impacts are positive



When prompted, more cons are recognised but still outweighed by pros

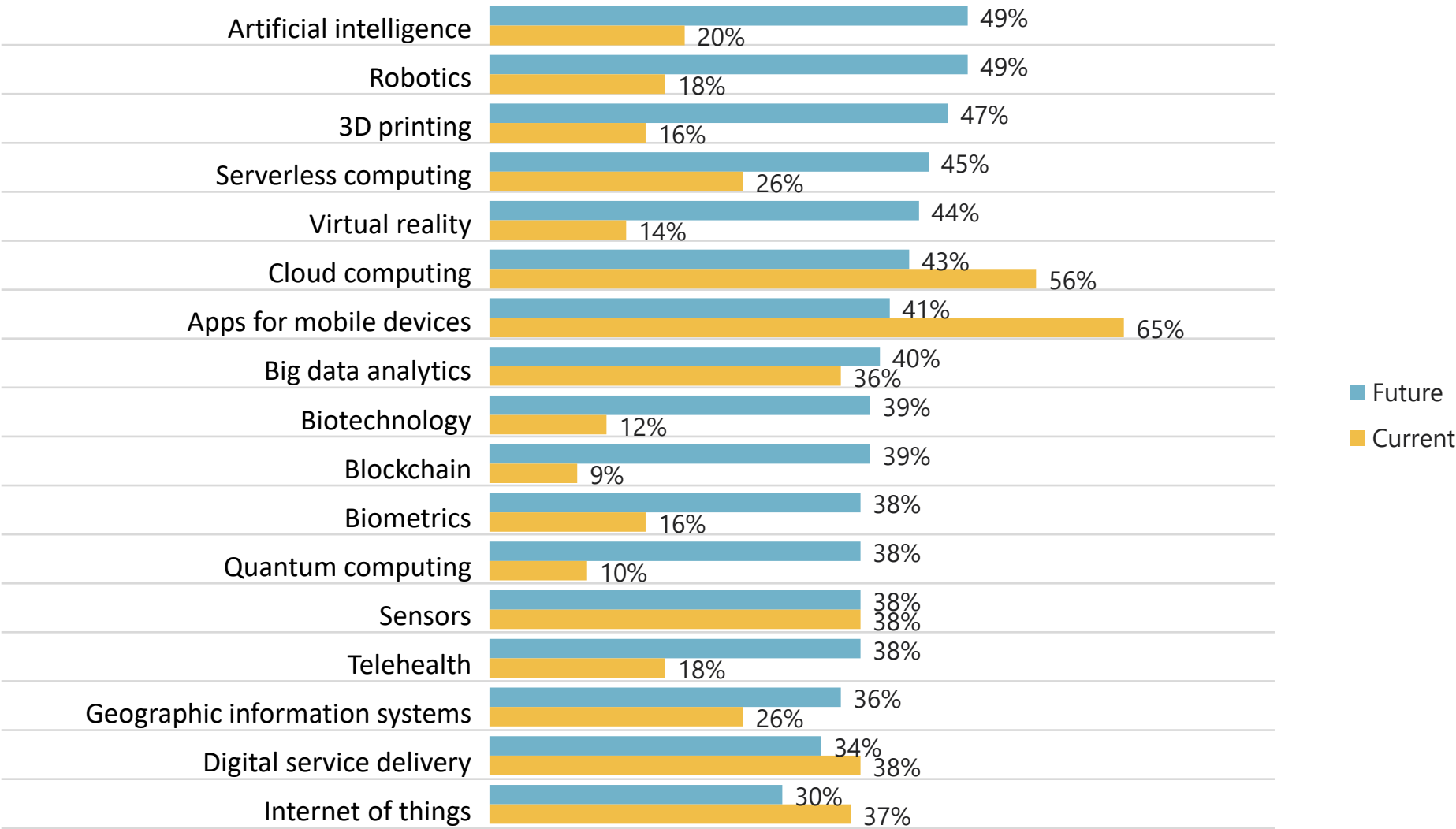
And our anticipation of the how technology will impact our jobs in the future is largely consistent irrespective of gender, age, location or occupation.

Anticipated future impact of technology in the workplace



Because the impact of the most disruptive technology may be yet to come

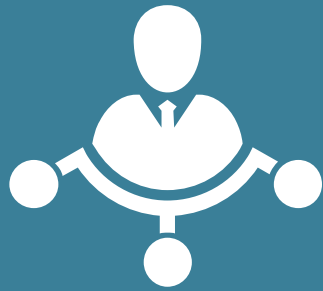
What technology is currently used in your workplace / is likely to be used in your industry over the coming decades?



The WA workforce is agile and adaptable

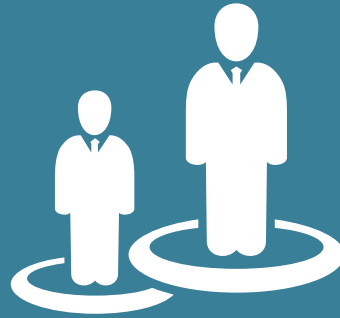
Most have changed occupations and over half have changed sectors over their working life.

Change is viewed largely positively with two-thirds who changed sectors reporting they are making the most of their experience, training and education.



55%

changed **sectors** over their
working life



69%

changed **occupations** over
their working life

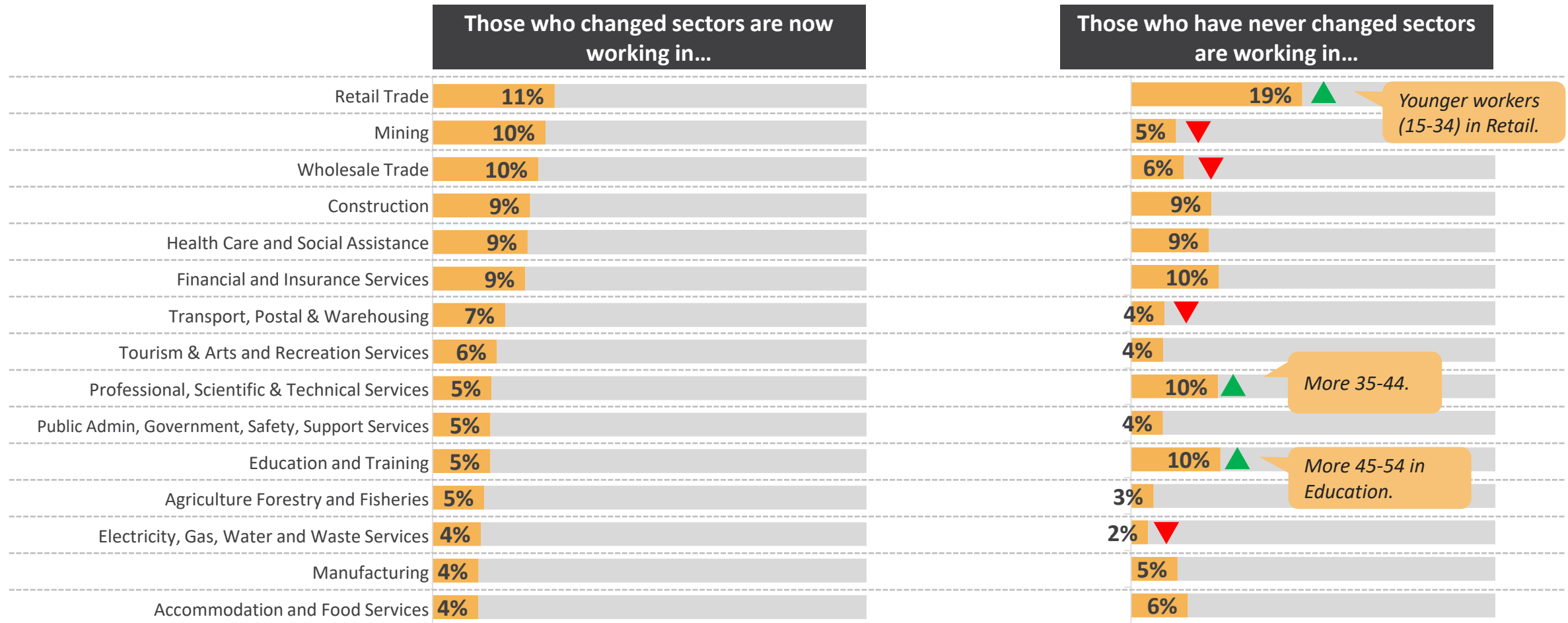


63%

of those who changed sectors
feel they are making the most of
their experience, training and
education

Education and professional services have a static workforce

Retail looks as if it's benefitting from a static workforce but this is more likely a product of the industry comprising a younger workforce that hasn't had the chance to change sectors. In contrast, mining and wholesale have benefited from those changing sector.



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Source: Q5 | Q8 Ipsos 2020 Future of Work & Study. WA workforce who changed sectors n=467; those who did not change sectors n=329.



COMMUNITY

Technology has not been a driver of past change

Despite more than half of the workforce having changed sector or role during their career, less than one-in-five have done so due to the impact of technology. However, the majority who did change due to technology had to undertake additional training to make the change.



18%

Changed roles within the same industry because original role no longer existed due to the impacts of technology



16%

Changed industries because prospects within that industry were reduced due to the impacts of technology



62%

required additional training to make the change

Training that they undertook...



Tertiary training

35%



Vocational training

22%



Technical training

22%



Professional development

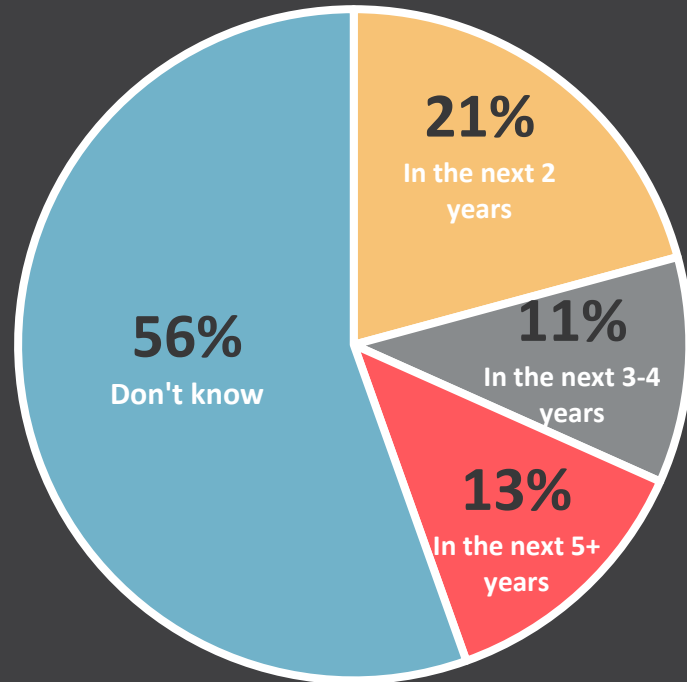
17%

Other

4%

We should expect more sector changes to come

I see myself changing sectors (44%)...



Industries more at risk:



of those working in **each industry** see themselves changing sectors in the next 2+ years

Because opportunities are perceived as limited in key sectors

Job opportunities are limited/ there are likely to be fewer jobs in my current sector in the near future (60% average)



83%

Professional, scientific
& technical services



77%

Financial &
insurance services



76%

Wholesale Trade



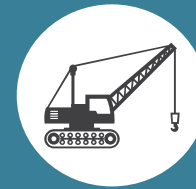
74%

Tourism, Arts &
Recreation



70%

Agriculture



64%

Construction

I would like to work in a new industry that is innovative and future-focused (37% average)



50%

Retail Trade



43%

Tourism, Arts &
Recreation



40%

Construction

And retraining should be funded by business

While those who have retrained in the past due to the impacts of technology relied on self-funding, most believe that employer is the main party to bear the responsibility to retrain the workers who are impacted by the rise of technology.

How was this training funded...

(Those undertook training in the past)



52%

Myself



39%

Employer



8%

Government

27%



Individual



51%

Employer



19%

Government

Who bears the responsibility to retrain those individuals impacted by the rise of technology in the future...



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Source: Q31|Q32 Ipsos 2020 Future of Work & Study. WA community n=1,009; Those undertook training n=134.



COMMUNITY

But again, technology is not seen as the key driver of change

The WA workforce believes that...

33%

they will **need to retrain** to stay in employment within their industry

22%

it is possible that their **job will be done by a machine** in the future

22%

it is possible that they will lose their job because it will be **outsourced**

22%

it is possible that they will lose their job because of the **rise in digital services**

These beliefs are strengthened amongst those planning to change sectors

45%

they will **need to retrain** to stay in employment within their industry

36%

it is possible that their **job will be done by a machine** in the future

34%

it is possible that they will lose their job because it will be **outsourced**

37%

it is possible that they will lose their job because of the **rise in digital services**

Women see far less impact from technology on the horizon

Women are more likely to work in healthcare and social assistance, and education and training, sectors recognised as being less under threat from major technological disruption. Still, a lack of preparation could leave these sectors vulnerable to the broad impacts of technology in the future.



Technology will significantly or completely change the way I perform my job in the next...

6 months

35%

18%

1-5 years

46%

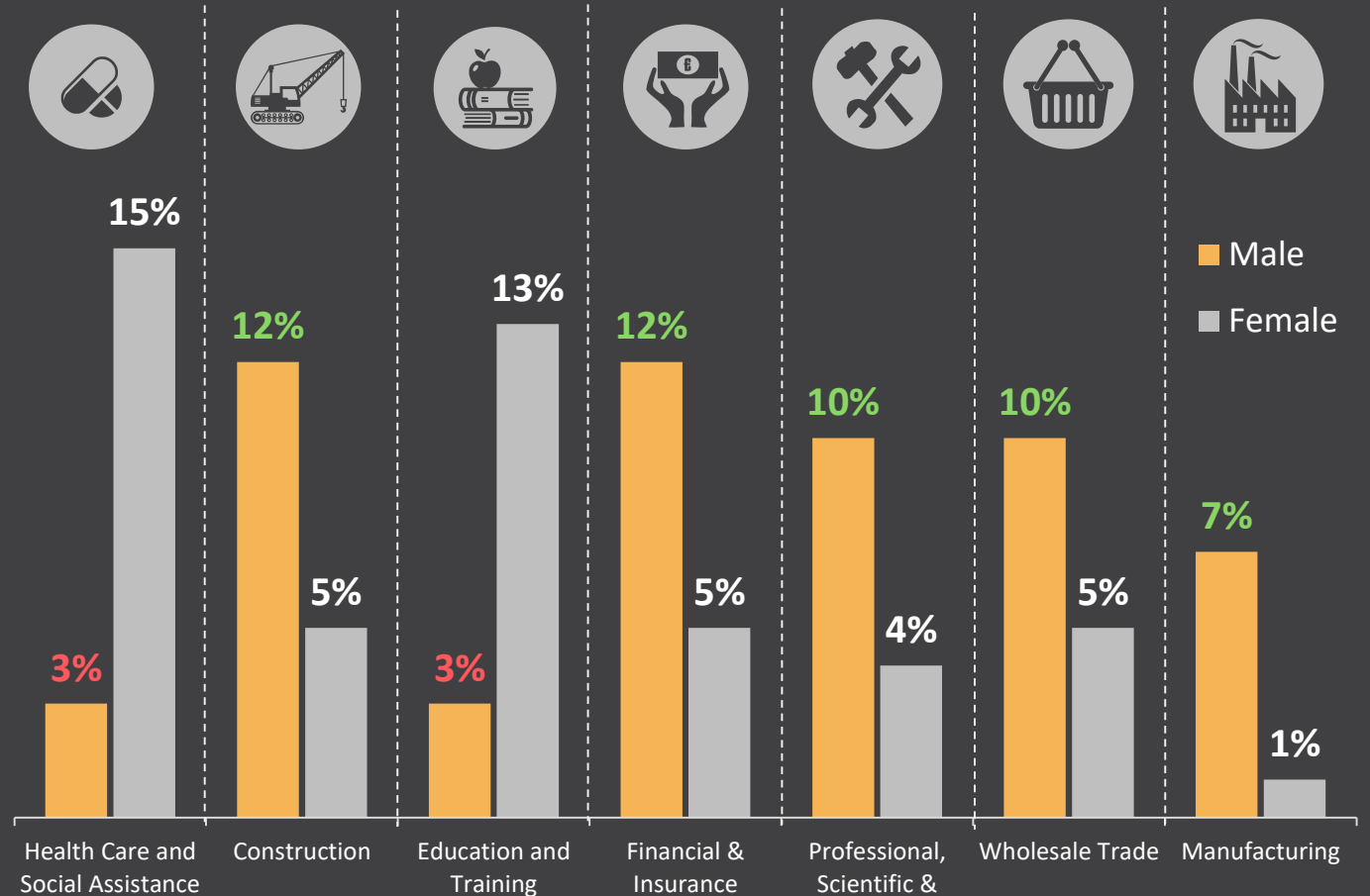
30%

5-10 years

60%

40%

Sector participation by gender



While men see a greater risk posed by technology



	Men agree that...	Women agree that...
I will need to retrain to stay in employment within my industry	41%	24%
It is possible that my job will be done by a machine in the future	26%	17%
It is possible that I will lose my job because it will be outsourced to a company elsewhere in Australia or overseas	28%	14%
It is possible that I will lose my job because of the rise in digital services (i.e. online retail)	26%	16%

But are no more likely to be undertaking training



ACTIVELY LOOKING FOR A NEW JOB TO REPLACE/ IN ADDITION TO THE CURRENT ONE

39%

ACTIVELY LOOKING FOR A JOB IN MY AREA OF TRAINING/EDUCATION

14%

ACTIVELY LOOKING OUTSIDE MY AREA OF TRAINING/EDUCATION

7%

UNDERTAKING TRAINING/EDUCATION IN A NEW FIELD TO IMPROVE MY EMPLOYABILITY

6%

NONE OF THE ABOVE

50%



30%

10%

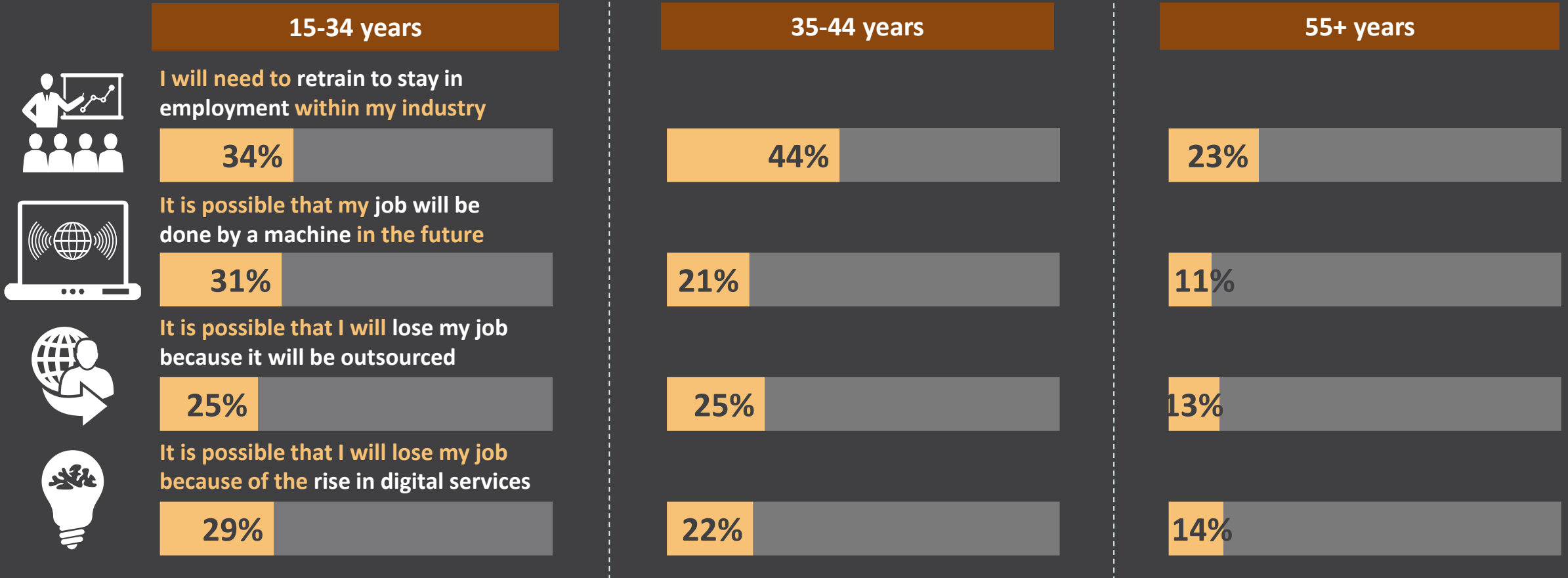
4%

7%

58%

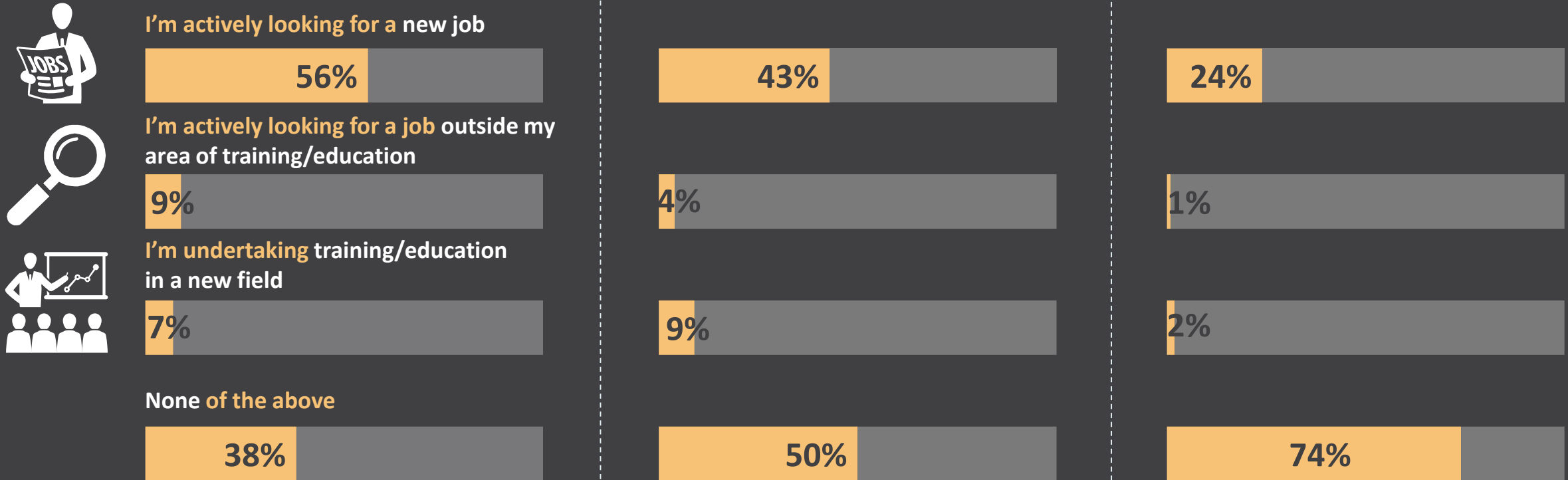
Younger cohorts are more likely to acknowledge the risks

Older people don't see the risk and are less inclined to retrain. Young people are more prepared and ahead of this issue.



They are also more likely to be preparing

Older people don't see the risks and less inclined to retrain. Young people are more prepared and ahead of this issue.

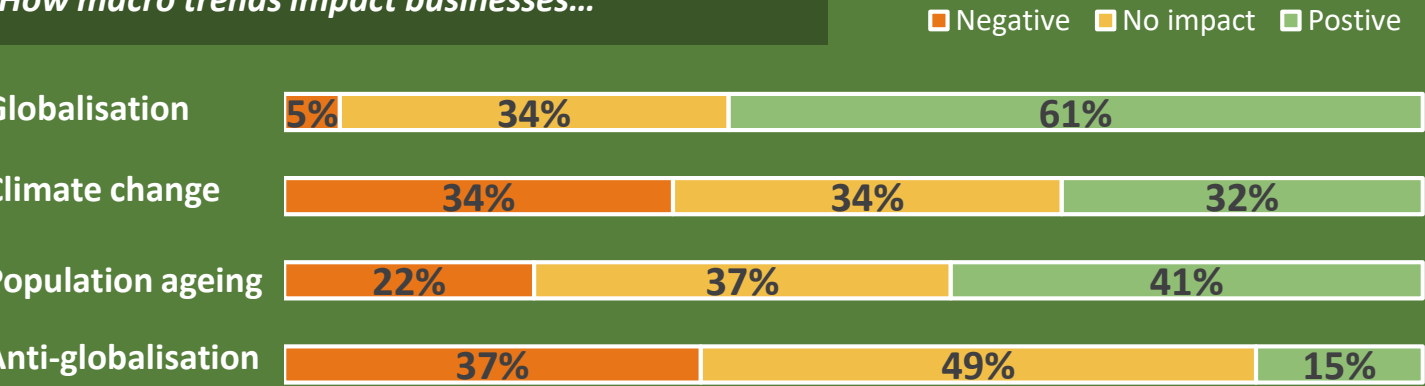


**BEING PREPARED FOR
FUTURE CHANGES:
BUSINESS**

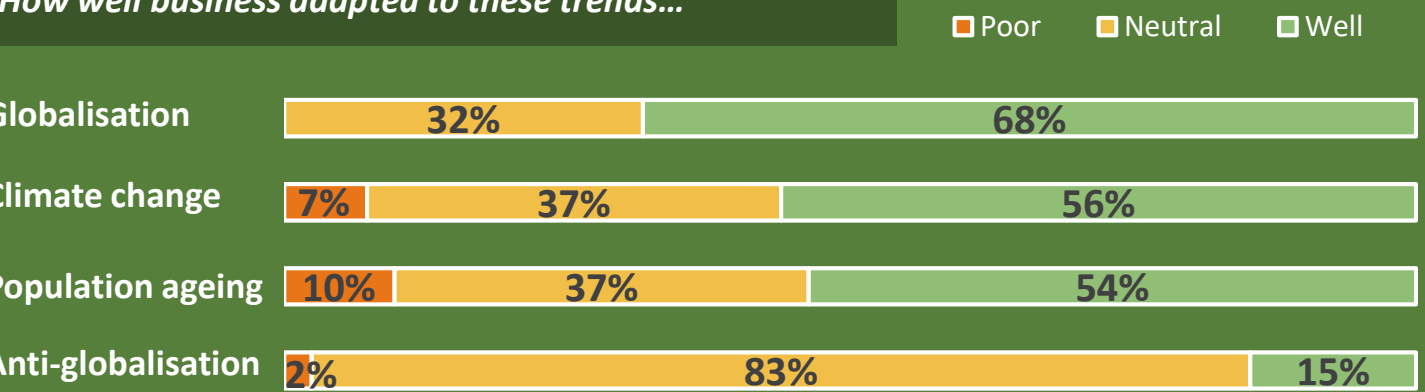


Business is planning for increased technology to manage macro trends

How macro trends impact businesses...



How well business adapted to these trends...



Priority action points to adapt to future trends...



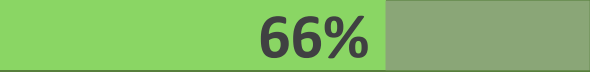
ADOPT NEW TECHNOLOGIES



INCREASE TRAINING FOR STAFF



SHIFT TOWARDS MORE FLEXIBLE EMPLOYMENT OPTIONS



MOVE INTO NEW MARKETS



CHANGE OUR BUSINESS MODEL



© 2020 Ipsos.

Source: Q28|Q29|Q30 Ipsos 2020 Future of Work & Study. WA businesses/organisations n=41.



MEMBER

And will be more focused locally in the short-term

Companies indicate a short-term retraction back to an ANZ focus, with a long-term view of expanding globally or within the region (Australia, Asia).

Past business strategy...

IN THE LAST 9 MONTHS SINCE COVID-19



1-5 YEARS AGO



5-10 YEARS AGO



- Mainly locally focused + Completely locally focussed
- Balanced between globally and locally focussed
- Completely globally focussed + Mainly globally focussed

Future business strategy...

“The pandemic has and is changing the global economy...”

“Short term retraction back to Australia and New Zealand, Asia will remain a part of the growth pathway...”

“Need to localise and adapt the global strategies to suit market conditions in WA.”

“We anticipate more nationally based projects.”

“Our key customer is Australian based.”

“Market expansion, new revenue streams impacted by global trade.”



51%

plan on being mainly or completely locally focussed



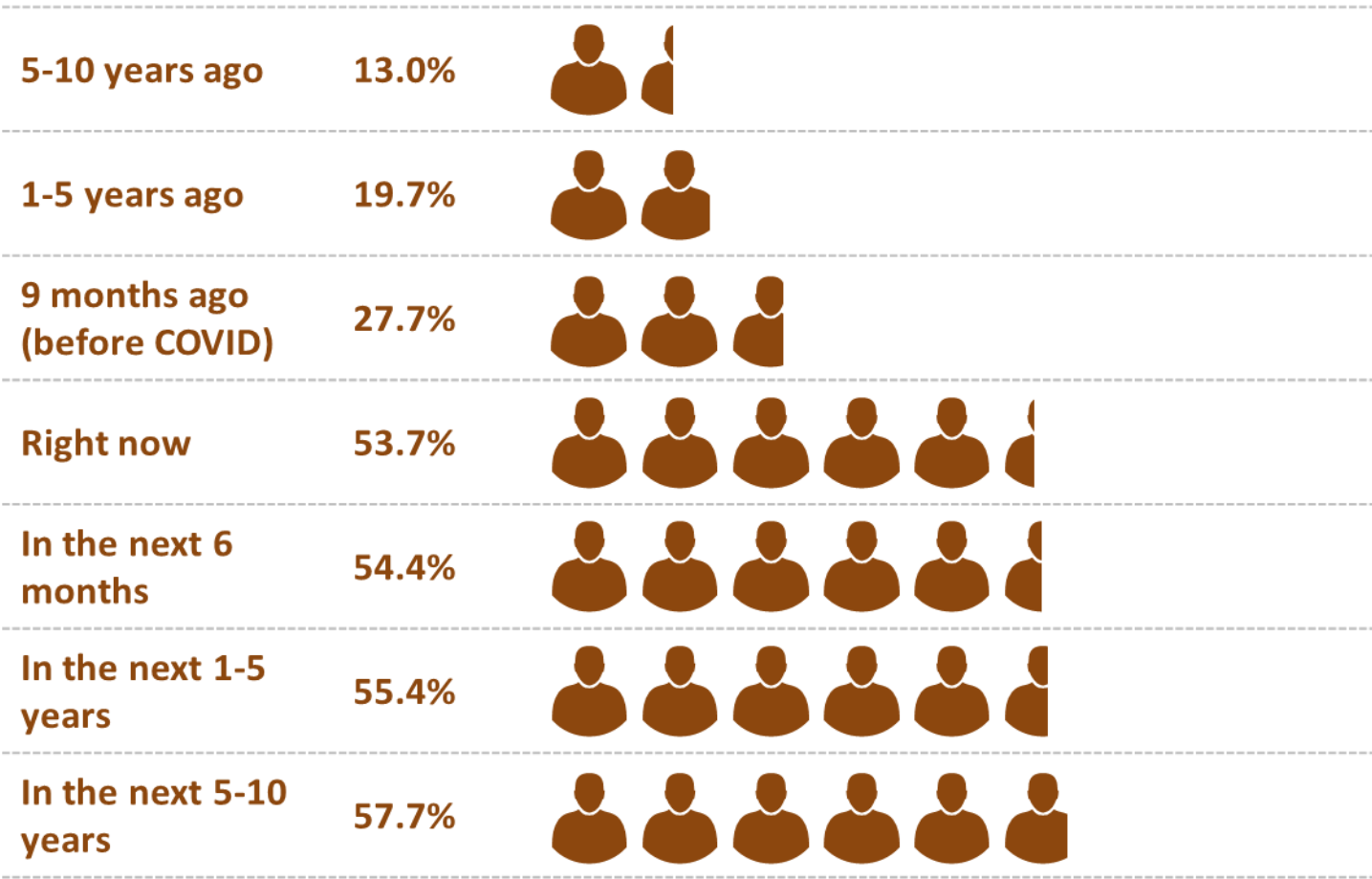
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Source: Q13|Q14|Q15 Ipsos 2020 Future of Work & Study. WA businesses/organisations n=41.



Business is increasingly shifting to agile working...

Proportion of workforce working in an agile way...

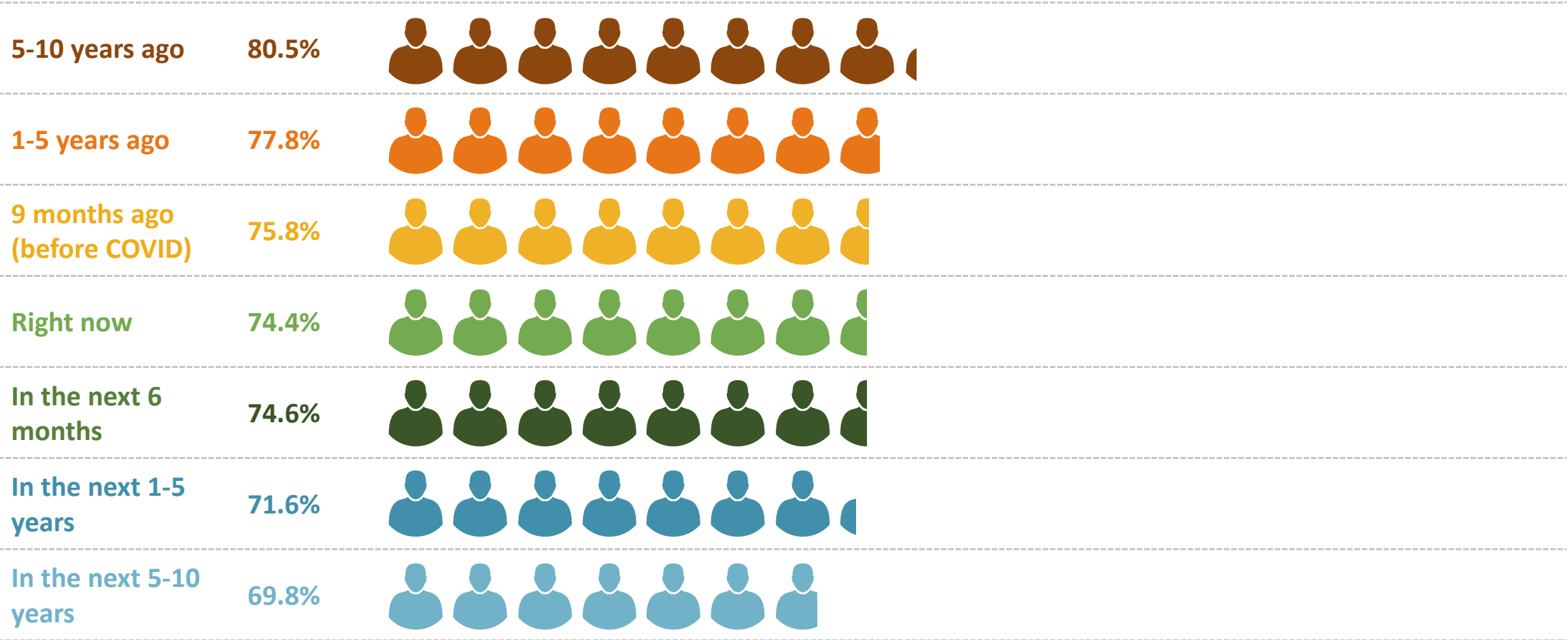


66%

of businesses plan to shift towards **more flexible employment** options to adapt to future trends and global changes.



With the proportion of full time workers decreasing...

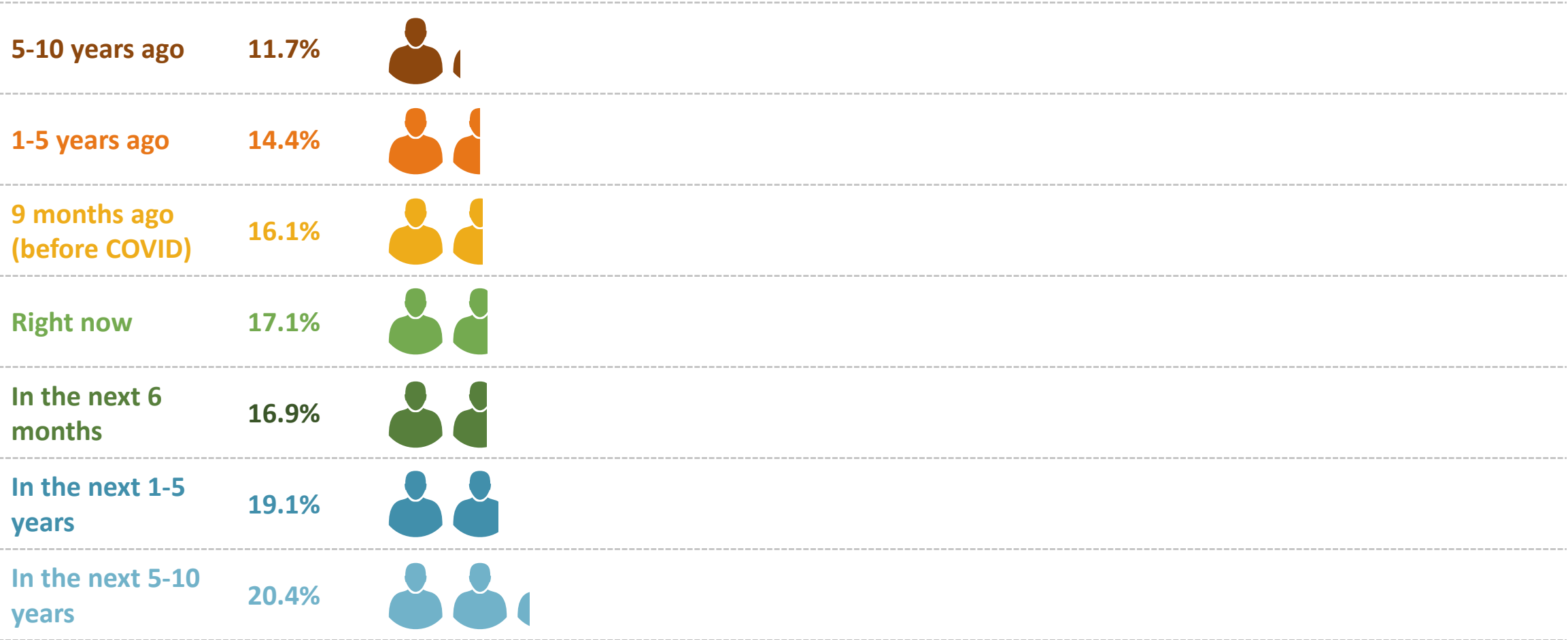


© 2020 Ipsos.

Source: SQ5|SQ6 Ipsos 2020 Future of Work & Study. WA businesses/organisations n=41.



And part time workers slowly increasing



Access to a skilled workforce will continue to be critical

How easy or difficult was it to access skilled workforce required for your company/organisation...



49%

felt it was **somewhat difficult** for them to access the skilled workforce required **before COVID-19**

Why....

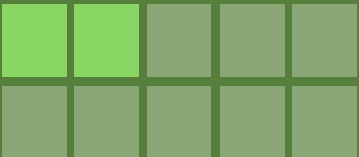
“High demand for required workforce”

70%



“Visa restrictions”

20%



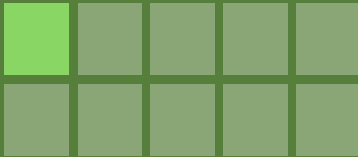
“Workforce not available in WA”

60%



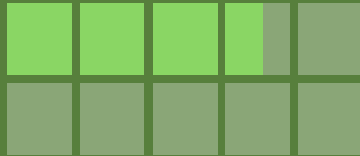
“Lack of training available”

10%



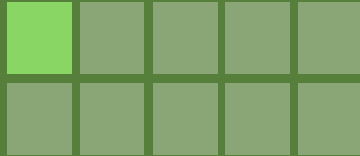
“Workforce not available in Australia”

35%



“Training available but insufficient uptake”

10%



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Source: Q16|Q17 Ipsos 2020 Future of Work & Study. WA businesses/organisations n=41; those have difficulty to access the skilled workforce required n=20.



MEMBER

An aerial photograph of the Perth city skyline at sunset. The sun is low on the left, casting a warm orange glow over the city. The skyline features several prominent skyscrapers, including the Perth Mint and the Bank of Western Australia. The city is situated along a river, with a bridge visible in the foreground. The overall scene is a mix of urban architecture and natural elements like trees and water.

Thank you.

Prepared for: The Committee For Perth

Prepared by: IPSOS



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