



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HIKINA WHAKATUTUKI

A Snapshot of the Key Trends in the Workforce, Workplace, and Nature of Work

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Approach

Methodology

Method:

- Desk-top research
- Analyses of administrative/survey data
- Undertaken during April-May 2016

Limitations:

- Point-in-time
- Non-exhaustive compilation



Background



Global Megatrends



Technological change



Globalisation



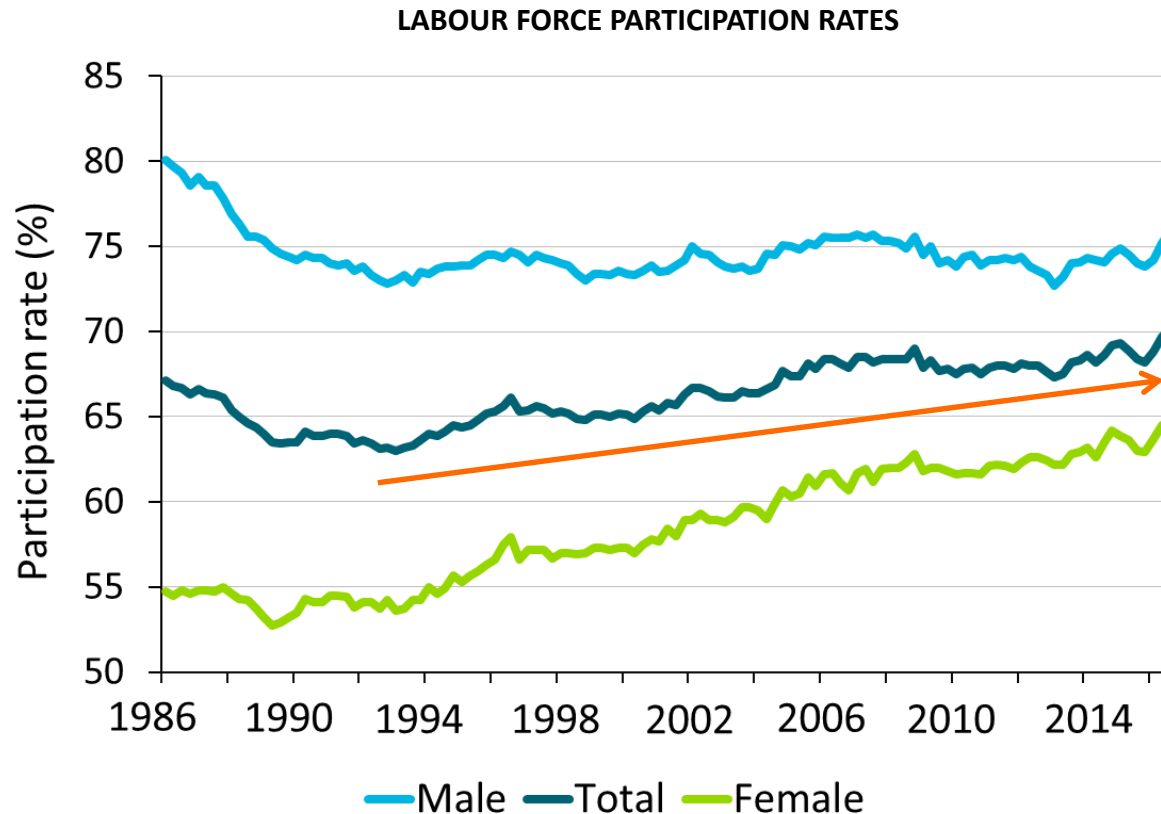
Demographic change



Workforce



The Workforce: Participation

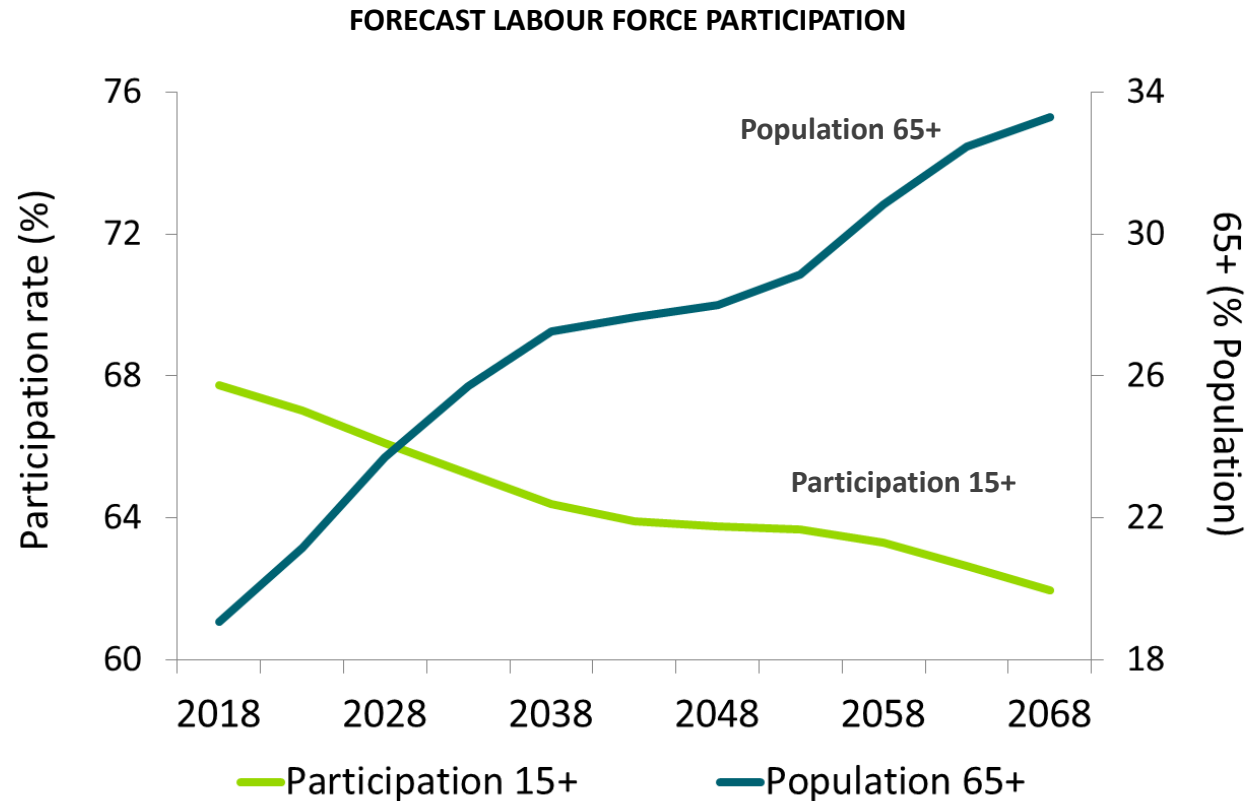


New Zealand was ranked **5th** in labour force participation in the OECD in 2015 (behind Iceland, Switzerland, Sweden, Netherlands).

Data source: Statistics NZ Household Labour Force Survey (2016). Mar 1986 to September 2016, seasonally adjusted.

Labour force participation has been increasing, driven by increasing participation of women.

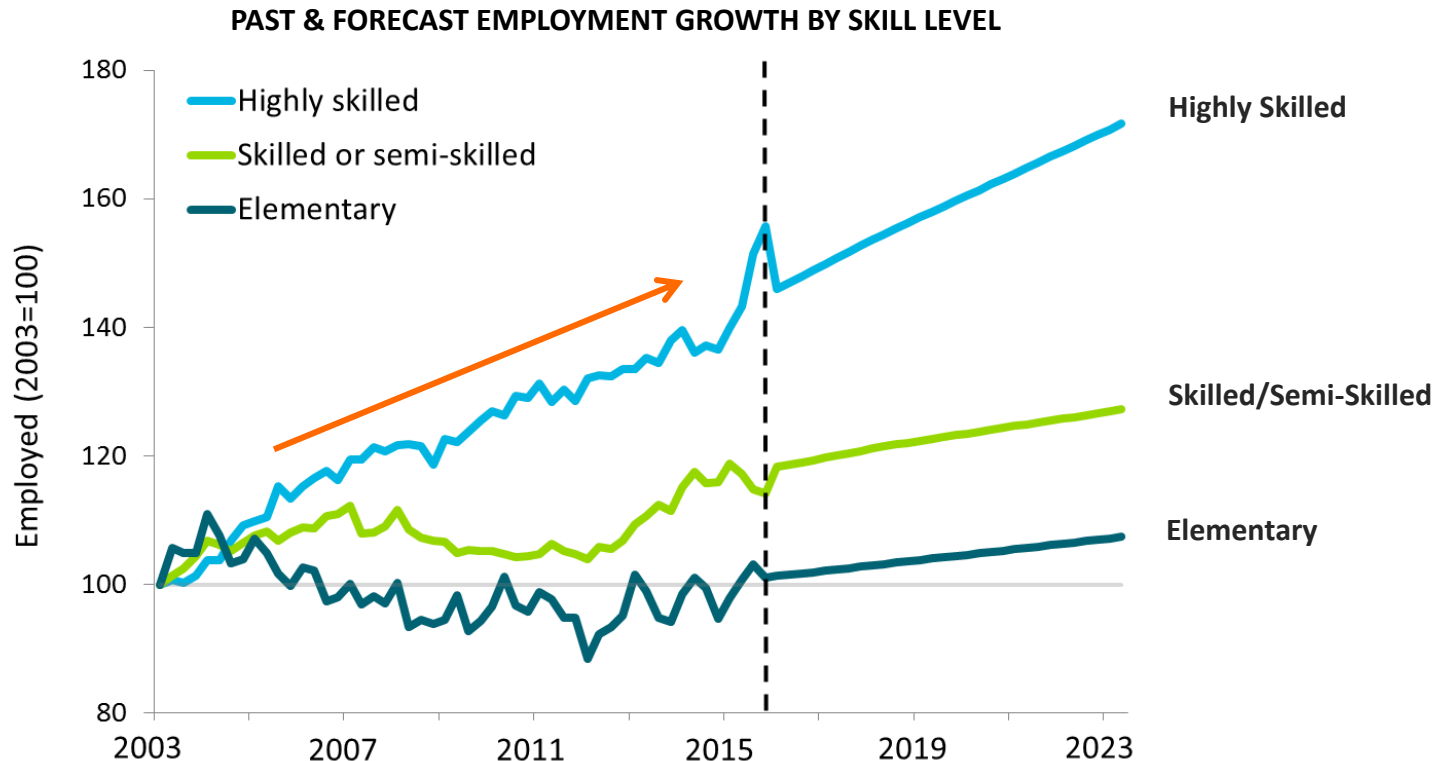
The Workforce: Participation *Forecast*



Data source: Statistics NZ National Labour Force Projections (Dec 2015).

Labour force participation is expected to decline, mostly due to a rising proportion of the population aged 65+.

The Workforce: Skills



Highly skilled = managers, professionals. (ANZSCO 1-2)

Skilled or semi-skilled = technicians & trade workers, community & personal service workers, clerical & administrative workers, sales workers. (ANZSCO 3-6)

Elementary = machine operators & drivers, labourers. (ANZSCO 7-8)

Data source: Historical data: Statistics NZ Household Labour Force Survey (2016). 2003 to September 2016. Forecast: MBIE Medium-Long Term Employment Outlook (Dec 2015). 2014 to 2024.

Employment in highly skilled jobs (professionals and managers) continues to grow strongly.

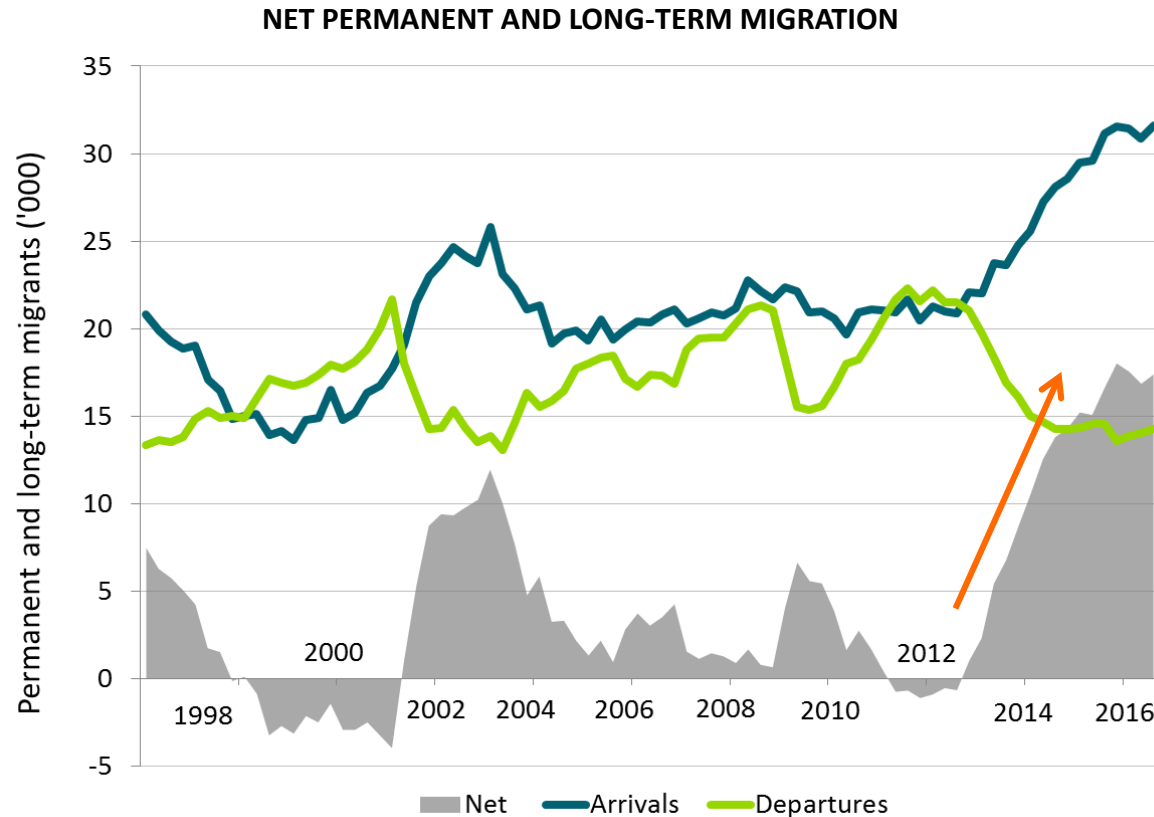
The Workforce: Ethnicity



Data source: Statistics NZ Household Labour Force Survey, September 2016 quarter.

Younger working age New Zealanders are more diverse.

The Workforce: Migrants



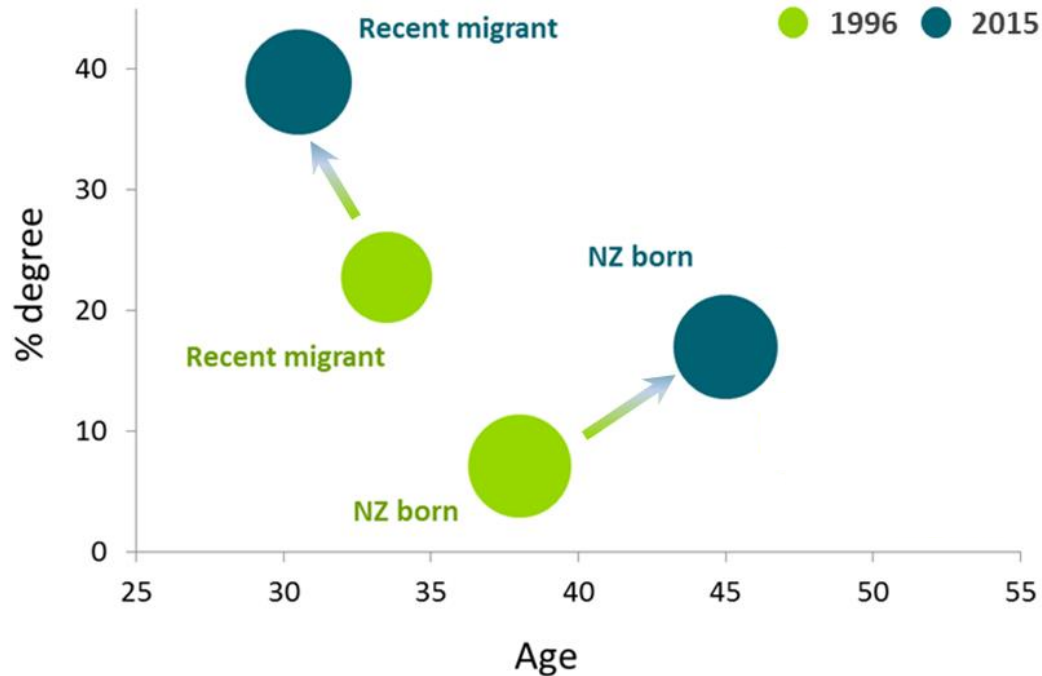
Data source: Statistics NZ Permanent and Long-Term(PLT) Migration Series (2016), March 1996 to September 2016 quarterly, seasonally adjusted.

New Zealand had net migration of 69,800 in the year to September 2016, and has been breaking net migration records for over two years.



The Workforce: Migrants

WORKING AGE MIGRANTS AND NZ-BORN BY DEGREE HOLDER & AGE



Results averaged over 4 quarters. Circle size is proportional to the employment rate (larger circle = higher employment). Recent migrants are those who have been in New Zealand for less than 5 years.

Data source: Statistics NZ Household Labour Force Survey (2016).

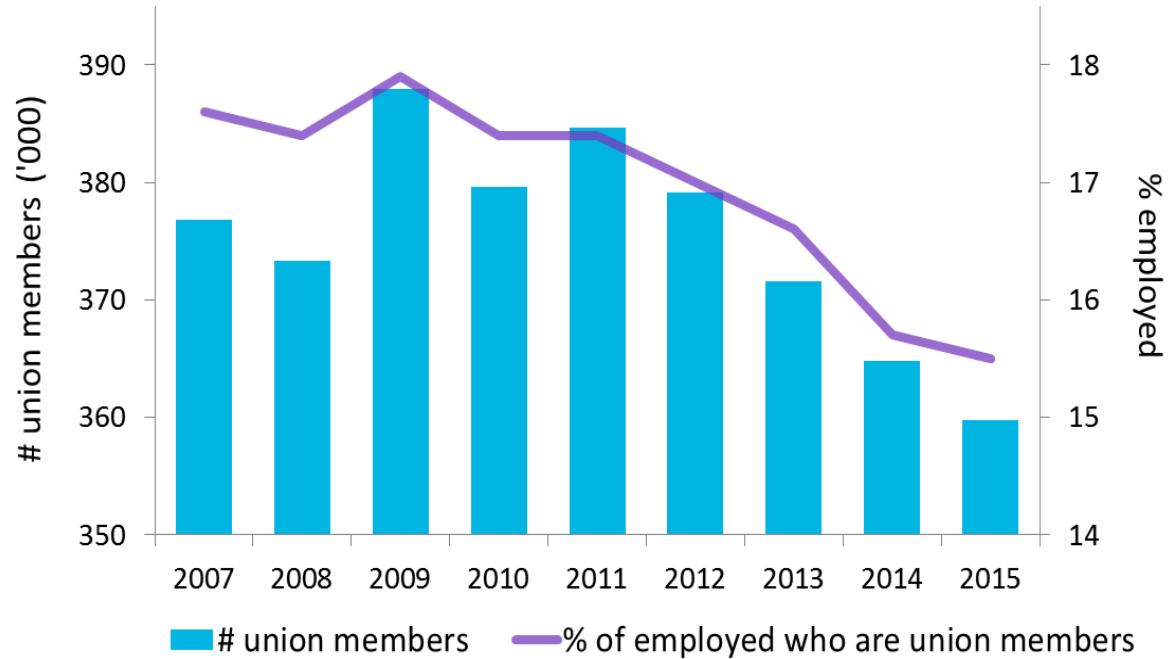
Recent working age migrants (less than 5 years in NZ) are generally younger and more educated than NZ born.

Workplace



The Workplace: Union Membership

TOTAL UNION MEMBERS AND AS PERCENTAGE OF EMPLOYED LABOUR FORCE



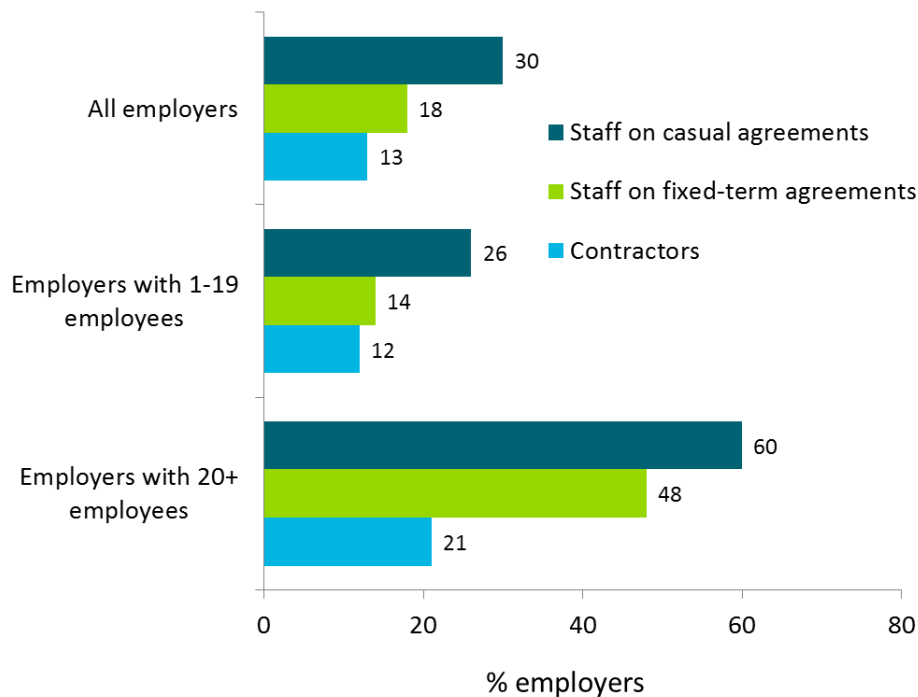
Union membership as of March 1 each year. Employed labour force includes managers and self-employed.

Data source: NZ Companies Office Annual Return Membership Reports (2015).

Continued decline in union membership since 2011.

The Workplace: Non-Standard Working Arrangements

PROPORTION OF BUSINESSES USING CASUAL AND FIXED-TERM WORKERS AND DEPENDENT CONTRACTORS



Of the two million paid employees:

4.9%

(96,800)

Casual employees

3.0%

(59,000)

Fixed-term employees

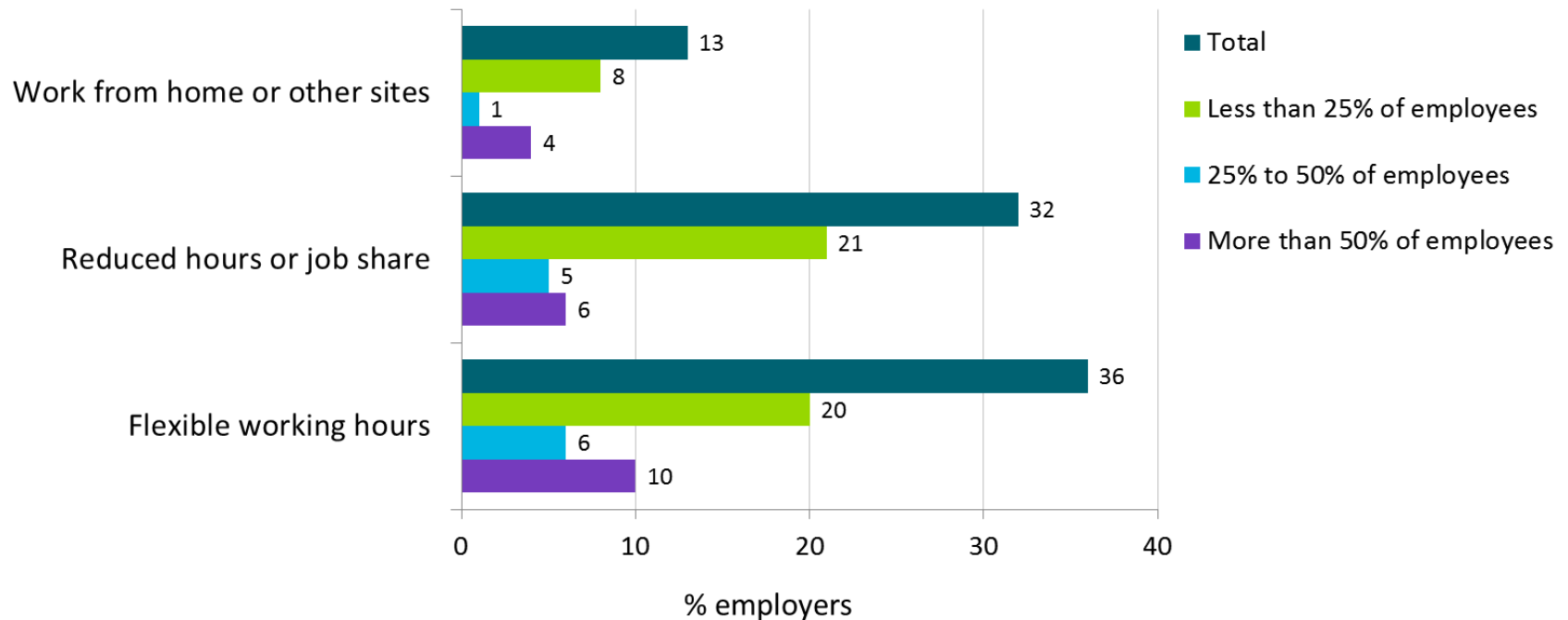
(HLFS, Sep 2016)

Data source: MBIE National Survey of Employers 2014/15.

Employers used non-standard working arrangements.

The Workplace: Flexible Working Arrangements

PROPORTION OF BUSINESSES WITH EMPLOYEES WHO HAVE NEGOTIATED TO USE FLEXIBLE WORKING ARRANGEMENTS

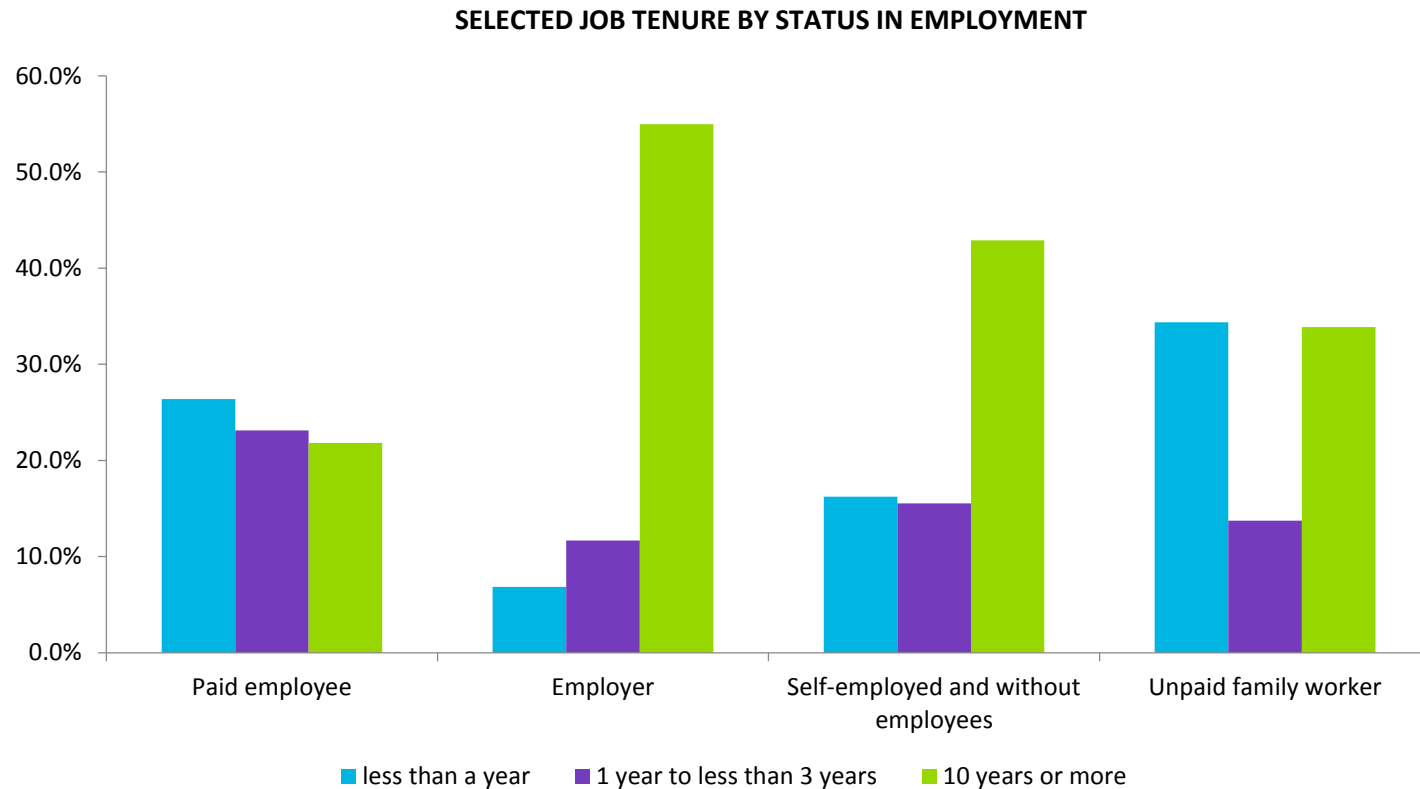


The NSE 2014/15 asked employers about the use of the following types of flexible working arrangements by employees: working reduced hours or job sharing, working flexible hours, and working from home or other sites.

Source: MBIE National Survey of Employers 2014/15.

Employees who had negotiated to use each of the three flexible working arrangements.

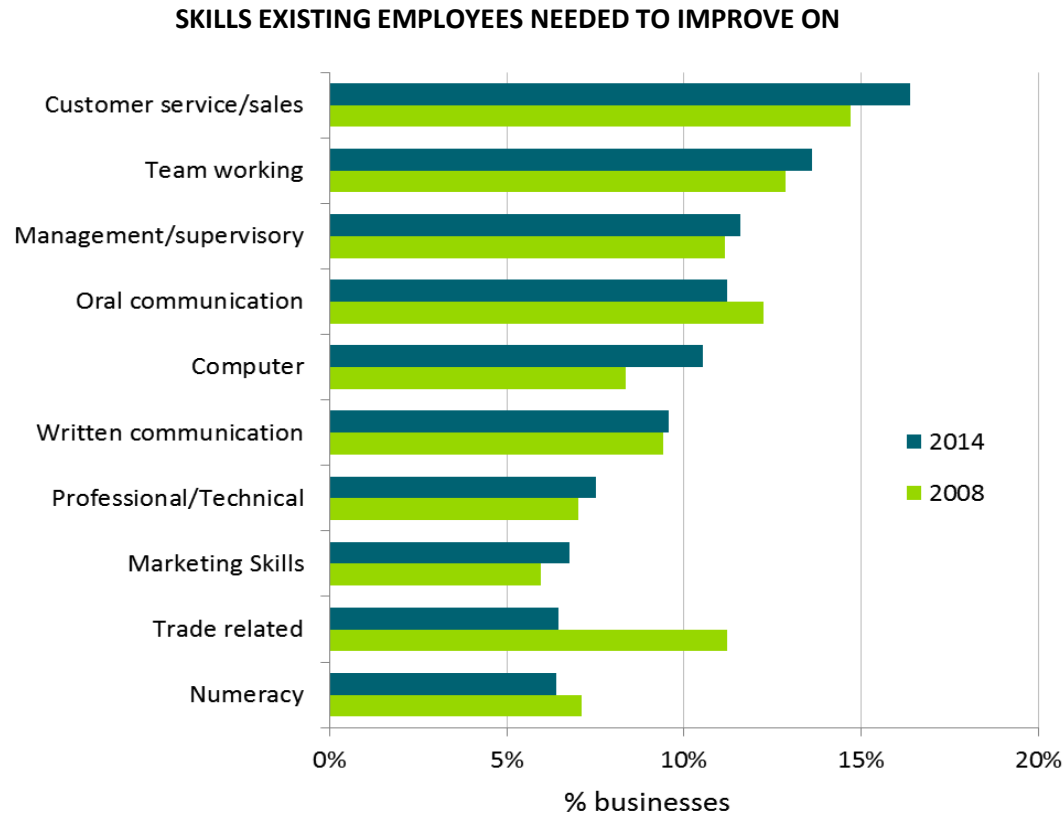
The Workplace: Job Tenure



Data source: Household Labour Force Survey September 2016.

Median job tenure within paid employees varied depending on the employment status.

The Workplace: Internal Skills Gap



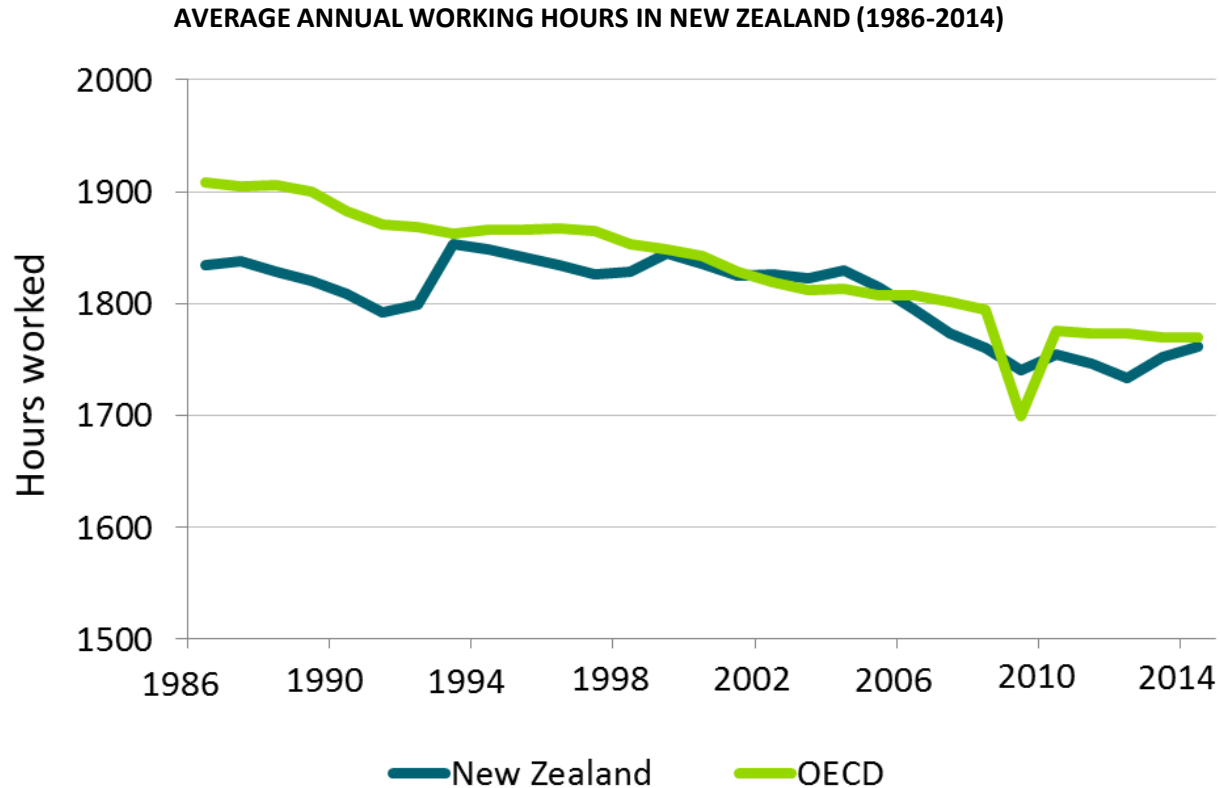
Data source: Statistics NZ Business Operations Survey (2014).

Potential skills gap is an increasing concern particularly with the ageing population.

Nature of Work



The Nature of Work: Hours Worked

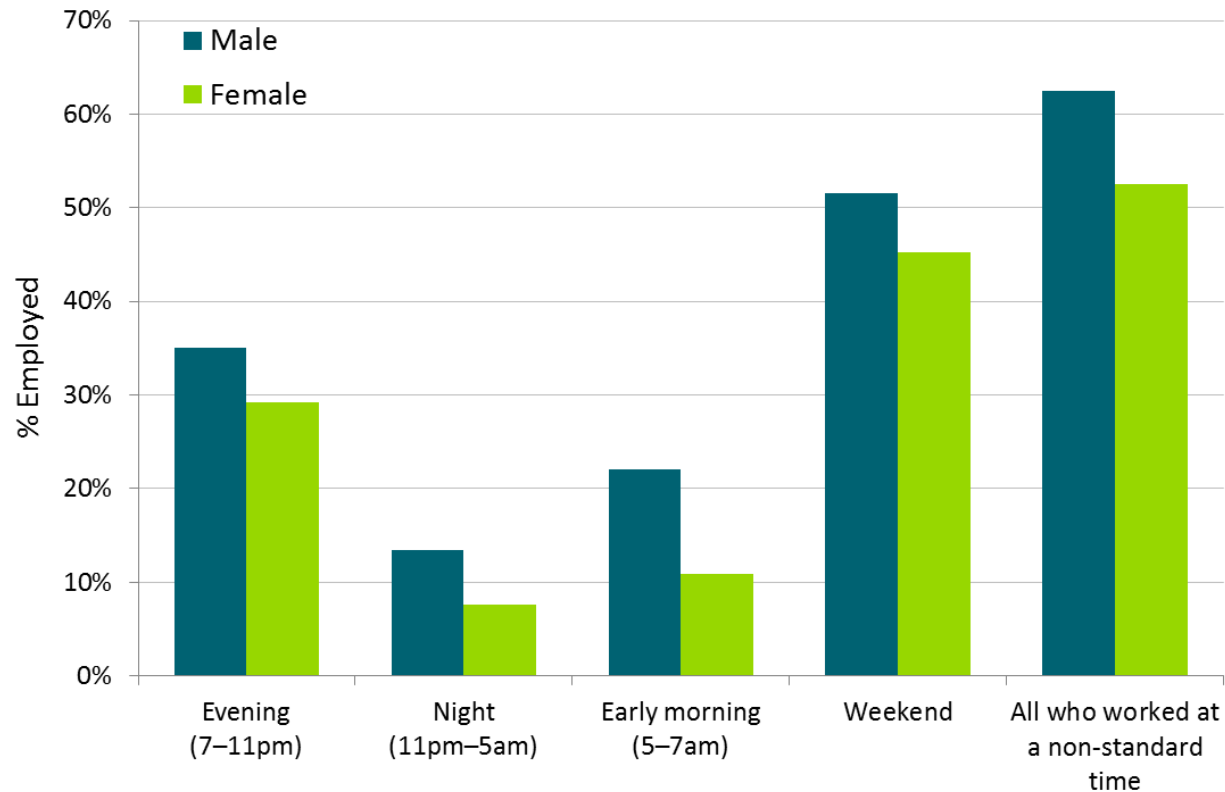


Data source: OECD.Stat (2016).

The average annual working hours continues to decline.

The Nature of Work: Hours Worked

PROPORTION OF EMPLOYEES WHO WORKED AT NON STANDARD TIMES IN THE LAST FOUR WEEKS



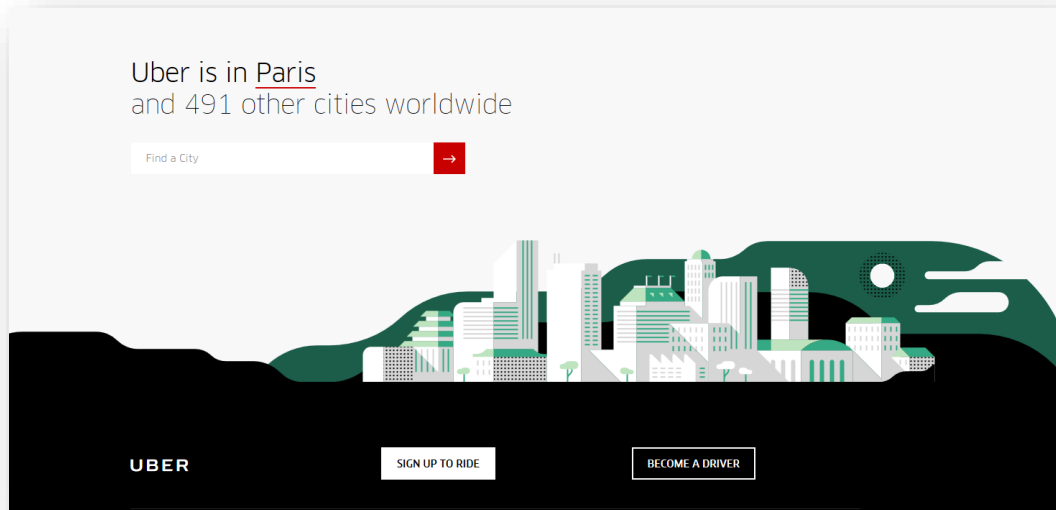
Data source: Statistics NZ Survey of Working Life (2012).

Four in ten did some or all of their work outside of “standard hours” (7am–7pm weekdays).



The Nature of Work: “Other” Work

How people access opportunities for work, and how they participate in work is changing



We have changed names – **NZexperts.co.nz** is now:

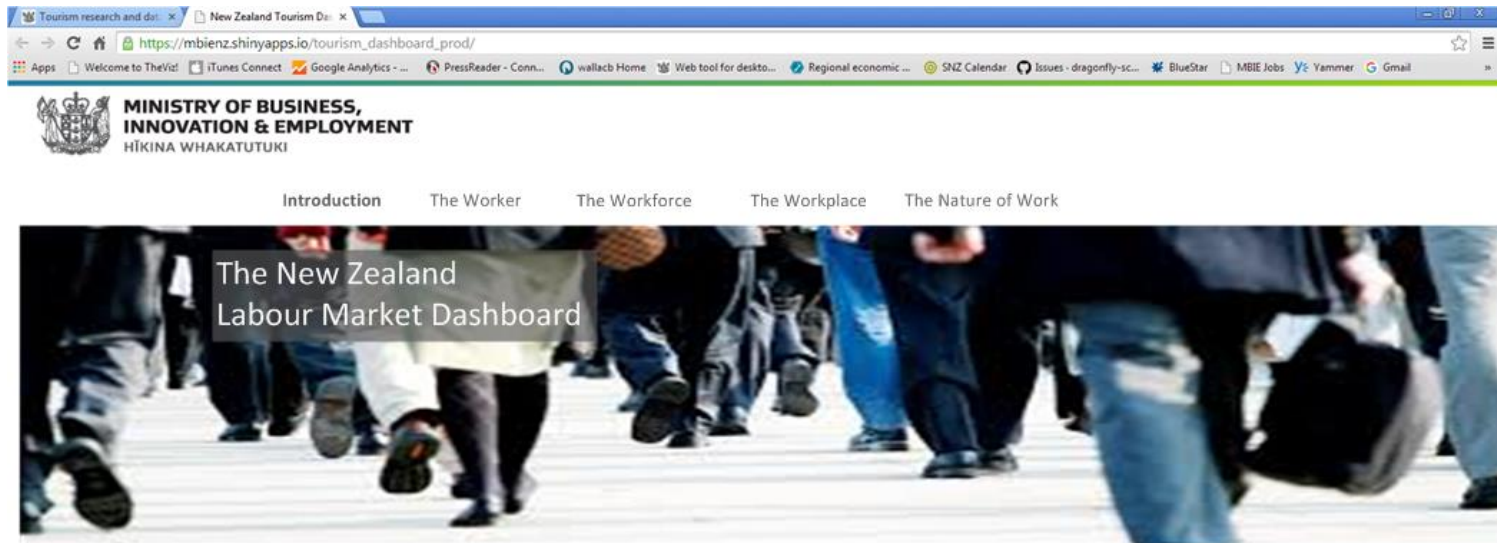
Zealancer.nz
New Zealand's most transparent marketplace for all contractors



Next Steps



Labour Market Interactive Dashboard



The New Zealand Labour Market Dashboard is an experimental tool displaying labour market information from many different sources in one place. The tabs designate different topics that display their contents in interactive charts for easy analysis.

The Worker

Data at the detailed level of occupation (ANZSCO Level 5) according to all the attributes that can be identified for these roles (age, gender, ethnicity, employment type, education, income, industry, region, etc). This uses mainly Census data.

The Workforce

A macro look at the workforce as a whole, and the attributes of the working age population (WAP), employed, unemployed, and not in the workforce (NILF), by the same sort of breakdowns as above (age, gender, ethnicity, employment type, etc) but at broader levels. This uses mainly Household Labour Force Survey (HLFS) data.

The Workplace

The firm, employer, organisation perspective on work. This section provides data on working from home, workplace health and safety, team work, union representation, use of sick leave, and staff training and study.

Further Research....



Conclusion



Is this the Future of Work?

