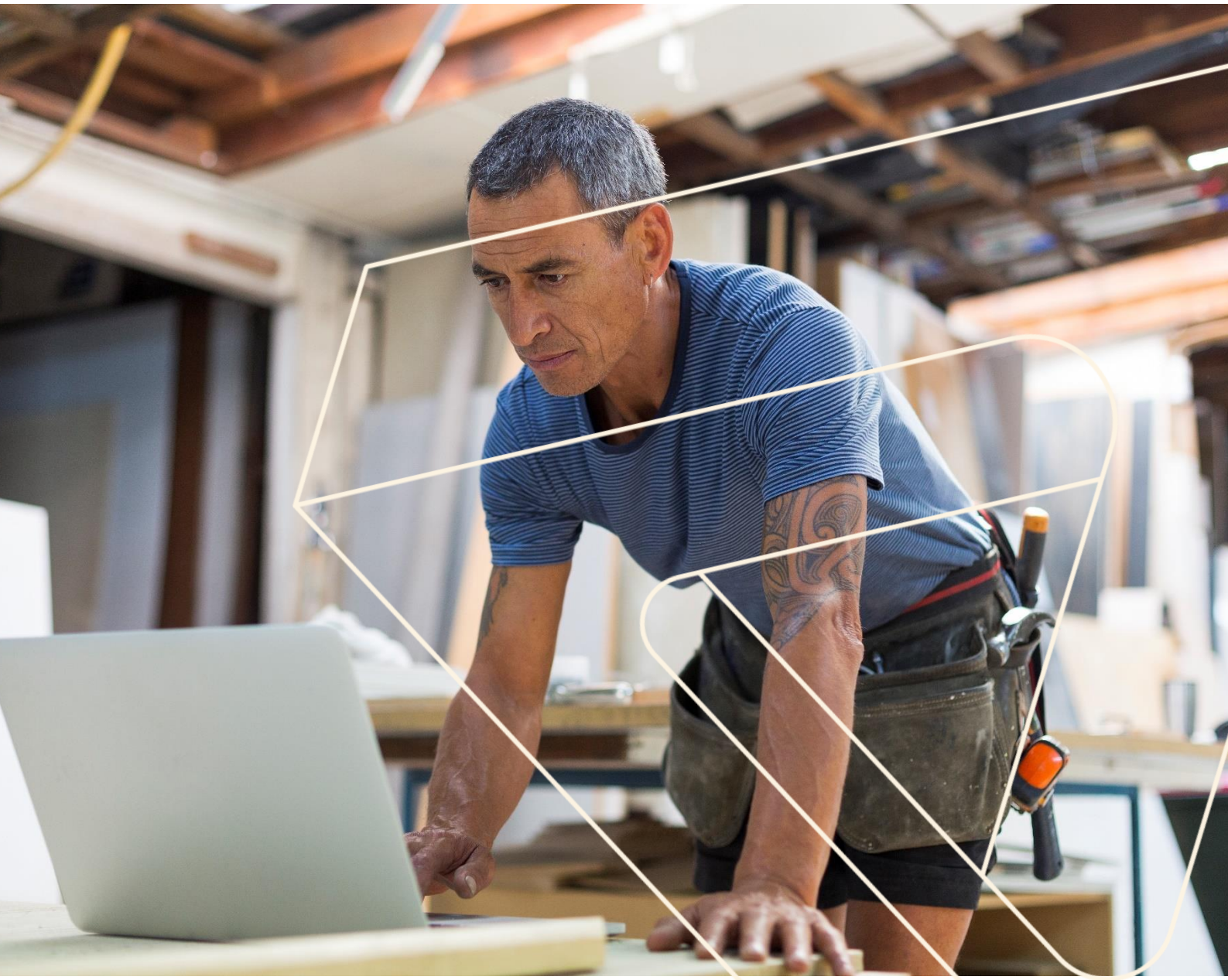
verian

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

Future of Jobs Report (Stage 2): The Worker Survey

Topline report

15 August 2024



Contents

1. Background and objectives

Broad global megatrends are shaping the future of work: technology change, demographic change, globalisation, climate change, and the COVID-19 pandemic. Labour markets are undergoing major transformations, new categories of jobs are emerging, others are partly or wholly being displaced.

The former Future of Work Tripartite Forum (the Forum) was a Forum between the Government, Business New Zealand and the New Zealand Council of Trade Unions. In March 2022, the Forum agreed on a shared definition of a Just Transition. It set out the principles of a just transition for the specific purpose of enabling the Forum to scope a national strategy and programme of work that meets these principles and works towards a Just Transition within the Future of Work Tripartite Forum framework.

Information is key to understanding what resources and assistance is needed to enable a just transition as well as knowing where to target and prioritise efforts. For a variety of factors, workers and employers from certain regions, towns, communities, employment type, ethnicities, genders, sectors, or industries could be less resilient to economic shocks and therefore less able to weather the impacts of a transition.

In 2022 the "Future of Jobs" research was scoped as a two-part research project. The first part of the research, which was completed in 2023, is a survey of large employers and is published here: Future of Work Tripartite Forum | Ministry of Business, Innovation & Employment (mbie.govt.nz).

The second part of the research is a worker survey, which builds on and enriches the findings of Stage 1. The worker survey focuses on four main areas:

- Workers' perceived employment security
- Workers' capacity to cope with disruption and change, including an in-depth focus on AI
- Education and skills training needs
- Impact of future of work trends on job quality.

This report presents topline findings of the worker survey. MBIE and the social partners hold the data for further sub-group analysis. Together the insights from Stage 1 and 2 reports can be used by government, industry and unions to inform proactive planning and policy for the future of work.

2. Research method

An online survey of 1,504 workers in New Zealand was conducted from 30 May to 21 June 2024.

The primary population of interest is all workers in New Zealand excluding self-employed workers.

The questionnaire was primarily developed by the Future of Work Forum partners with input from Verian. Many of the questions were sourced and adapted from the (now defunct) Statistics New Zealand Survey of Working Life, the OECD Worker Survey on AI, the EU Skills and Jobs Survey, and the PIACC Adult Skills Survey. Verian pre-tested and piloted the questionnaire with a small number of respondents.

Survey respondents were sourced from the Kantar and Dynata online panels. Quotas were set on age by gender, ethnicity, and industry.

The maximum margin of error on the total sample size of 1,504 is +/-2.5% at the 95% confidence level (and assuming simple random sampling). Subgroup analysis commented on in the text is statistically significant at the 95% confidence level unless otherwise stated.

Data were weighted using Census population data to reflect worker population characteristics on industry, age by gender, and ethnicity. A demographic profile of the total sample is appended.

Many of the charts in this report provide net response categories (e.g. total agreement). Due to rounding, the net response percentage may not exactly match the sum of the individual categories.

2.1. Research limitations

Limitations are inherent with all surveys. The key limitations relevant to this survey are listed below:

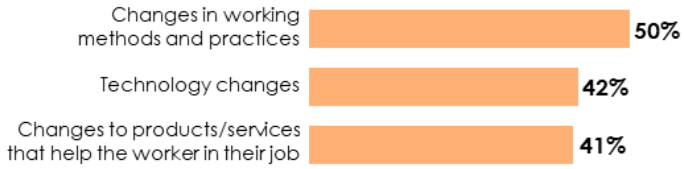
- Issues related to coverage, non-response and margins of error mean that compared with a census the findings from a sample may not exactly represent the actual perceptions and behaviour of the survey's target population – workers in New Zealand. The use of online panels to source respondents means that workers who are less digitally experienced are likely to be under-represented in the survey.
- Subgroup analysis (including industry analysis) carries higher margins of error than at the total sample level. This also applies to subsets based on how a respondent answered a question (e.g. current users of AI in their work).
- The data in this report are based on self-reported information. There may therefore be some differences between what is reported and reality, for example, worker perceptions of whether their employer uses AI.
- Survey results on current job quality may be impacted by question order bias – this is explained on page 34.
- The survey results in this report represent worker views at a point in time (mid 2024). Views may change quickly over time as AI rapidly evolves and economic conditions change. This survey was conducted during major public sector cuts.
- The results described in this report reflect an initial topline analysis of the survey data. More detailed analyses will be undertaken by MBIE and its social partners.

SUMMARY OF INSIGHTS: This section presents topline insights from an online survey of over 1,500 workers in New Zealand to understand their work outlook and capacity to meet the challenges of future working contexts.

Changes to jobs and the impact of future work trends

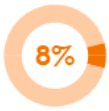
Workers are no strangers to change.

Around **seven in ten (69%)** workers experienced one or more of these changes in their main job in the last five years.



Workers expect AI to play an increasing role in their work, but it's not all positive.

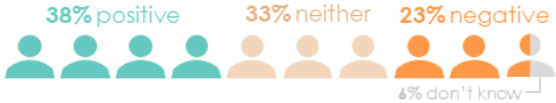
of all workers interact with AI in some way at work (in an AI-enabled organisation).



of all workers have personally been affected by AI automation of tasks.

Two in every three workers think it's likely they will work with AI or interact with AI in their work in the next five years.

Workers are more positive than negative about the overall impact of AI in their sector in the next five years.

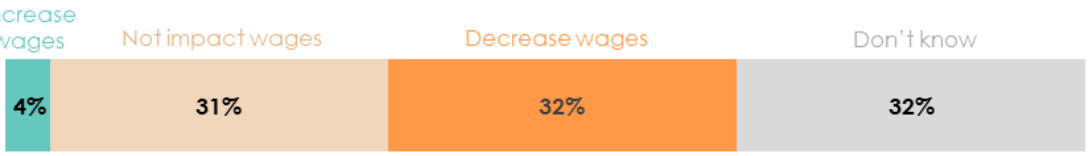


Agriculture, forestry and fishing is the only sector where workers are more negative than positive about the likely sector impact of AI.

of AI-enabled workers feel AI has increased their job performance.

of AI-enabled workers feel AI has increased their job enjoyment (just 9% felt this decreased).

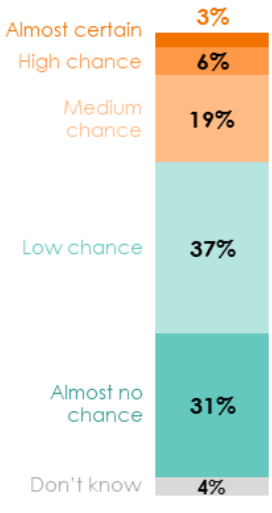
The expected impact of AI on wages is **largely negative**, with workers feeling that AI will…



Workers in the transport, postal and warehousing sector are most likely to think AI will decrease wages (51%).

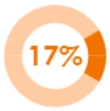
Workers' perceived employment security

Around one in four NZ workers lack job security.



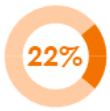
28% of workers believe they have at least a medium chance of losing their main job for a reason beyond their control in the next 12 months.

Other worker worries:



are not confident they will be able to financially support themselves and their family over the next 5 years.

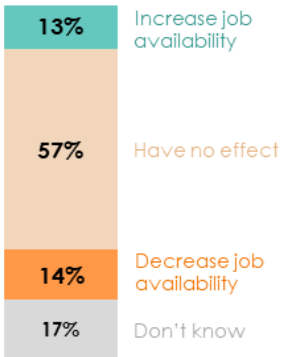
of workers worry new technologies will diminish the value of their existing skills.



are worried about losing their job because of AI.

The anticipated impact of climate change on job availability in a worker's sector is neutral.

Climate change will…

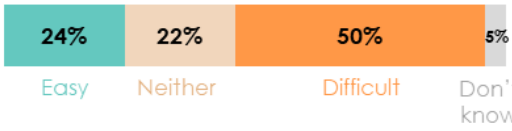


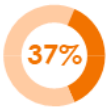
Workers' capacity to cope with disruption and change

Worker capacity to cope with disruption and change is limited for some.

Half of workers would need a job either immediately or within a month of losing their main job.

Half of workers would find it difficult to get another job with comparable conditions in their region.



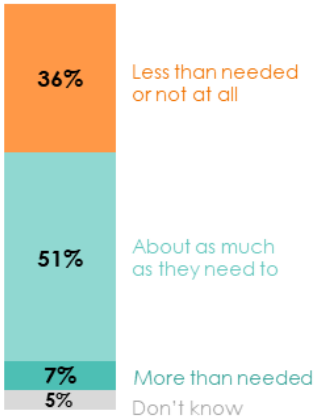


of workers are eligible for redundancy payments.

15% of workers are eligible for redundancy payments equivalent to at least three months' wages.

There is an opportunity to improve employer-worker consultation on job changes.

Employers consult workers about changes affecting the workplace…

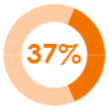


Education and skills training needs

Workers are largely confident in their skills and training is common.

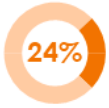
When asked how well their skills match what the job requires, workers say their skills are…

of workers who experienced a technology, method or product/service change in their job in the last five years received training for some or all of the changes.



of workers have done training courses or study paid by their employer in the last 12 months.

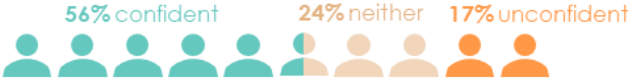
But demand exists for more training.



of workers say there were training or professional development activities in the last 12 months they wanted to participate in, but didn't.

worry they do not have the skills to work with new technologies.

A little over half of workers are confident they could access training to develop their careers.

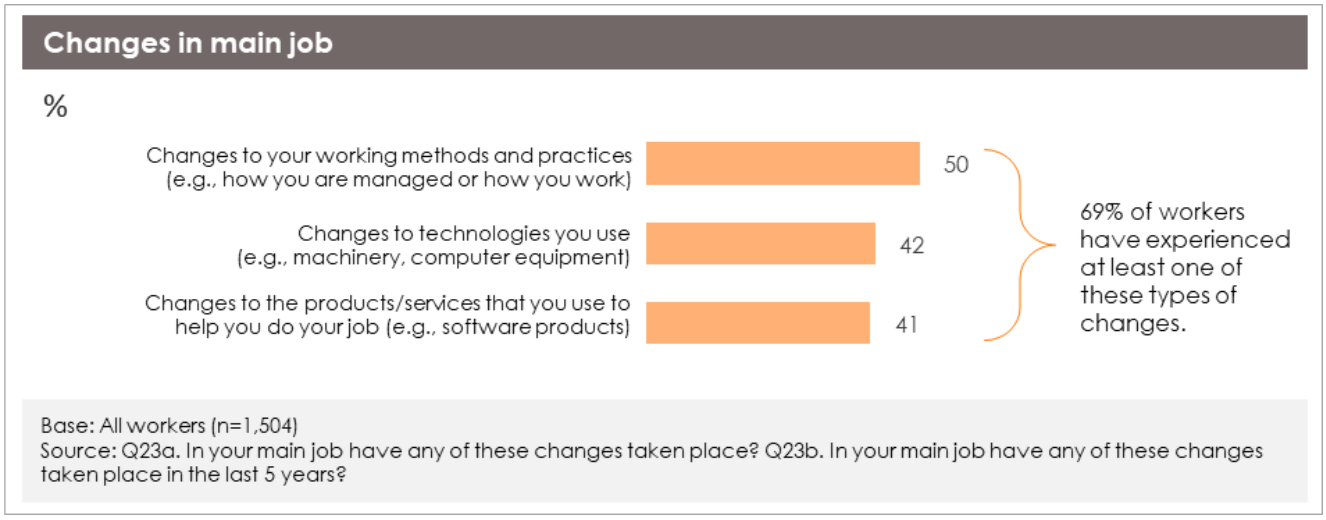


3. Changes to jobs and the impact of future work trends

This section covers changes workers have faced in their main job and their perceptions of the potential employment impacts of new technologies. This includes an in-depth focus on AI.

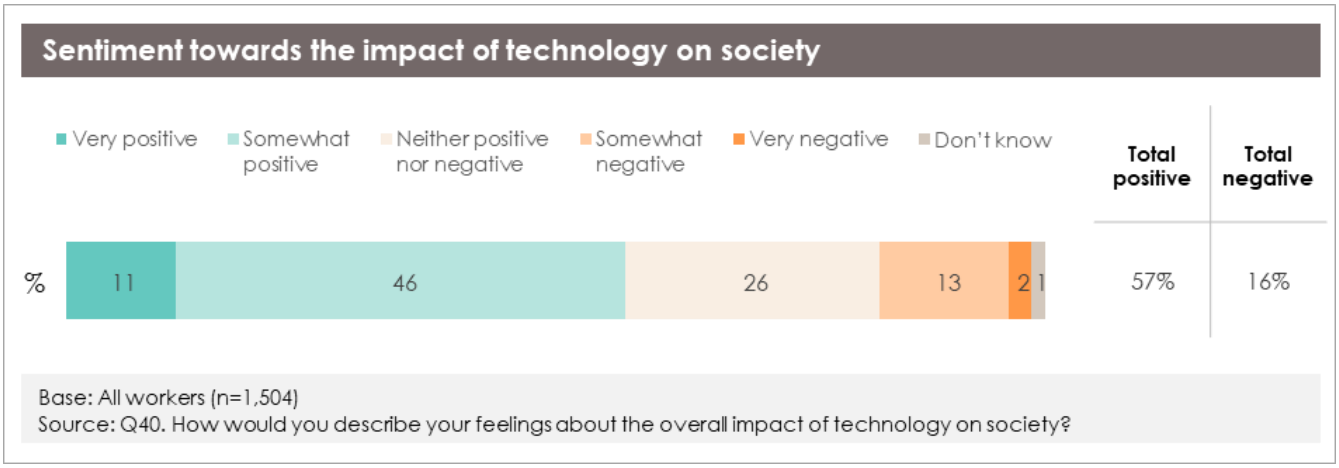
3.1. Changes in main job

Over two thirds (69%) of workers have experienced method, technological or product/service-related changes in their main job in the last five years.



3.2. Sentiment towards the impact of technology in society

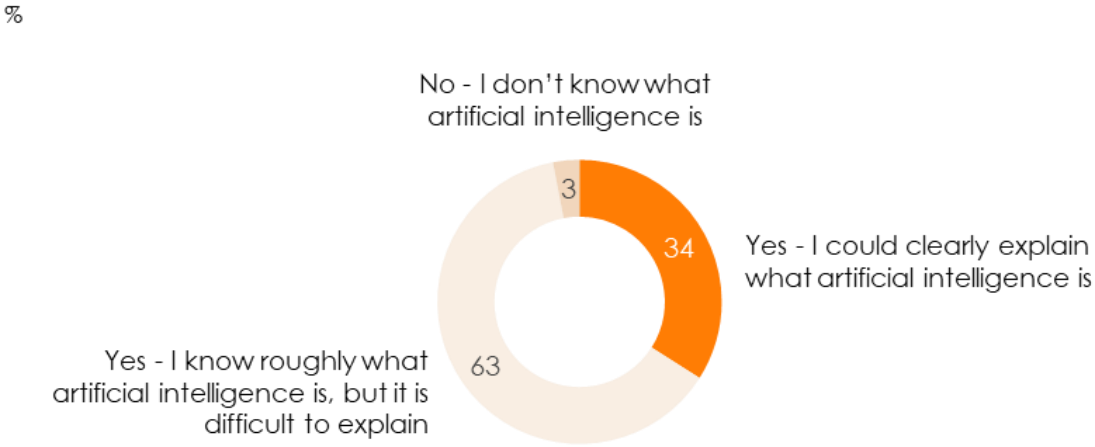
Worker sentiment towards the impact that technology has on society is more positive than negative, with just over half (57%) taking a positive view and 16% viewing it as negative. The remainder are largely neutral.



3.3. Awareness and use of AI

While almost all (97%) workers have heard of artificial intelligence (AI), only a third (34%) could clearly explain what it is. Respondents were not provided with a definition of AI for this initial survey question.

Unprompted awareness of AI



Base: All workers (n=1,504)
Source: Q41. Have you heard of artificial intelligence (AI)?

The following charts display workers' and worker perceptions of employers' current use of AI. The following explanation was given to survey respondents before they answered the survey questions underpinning these results.

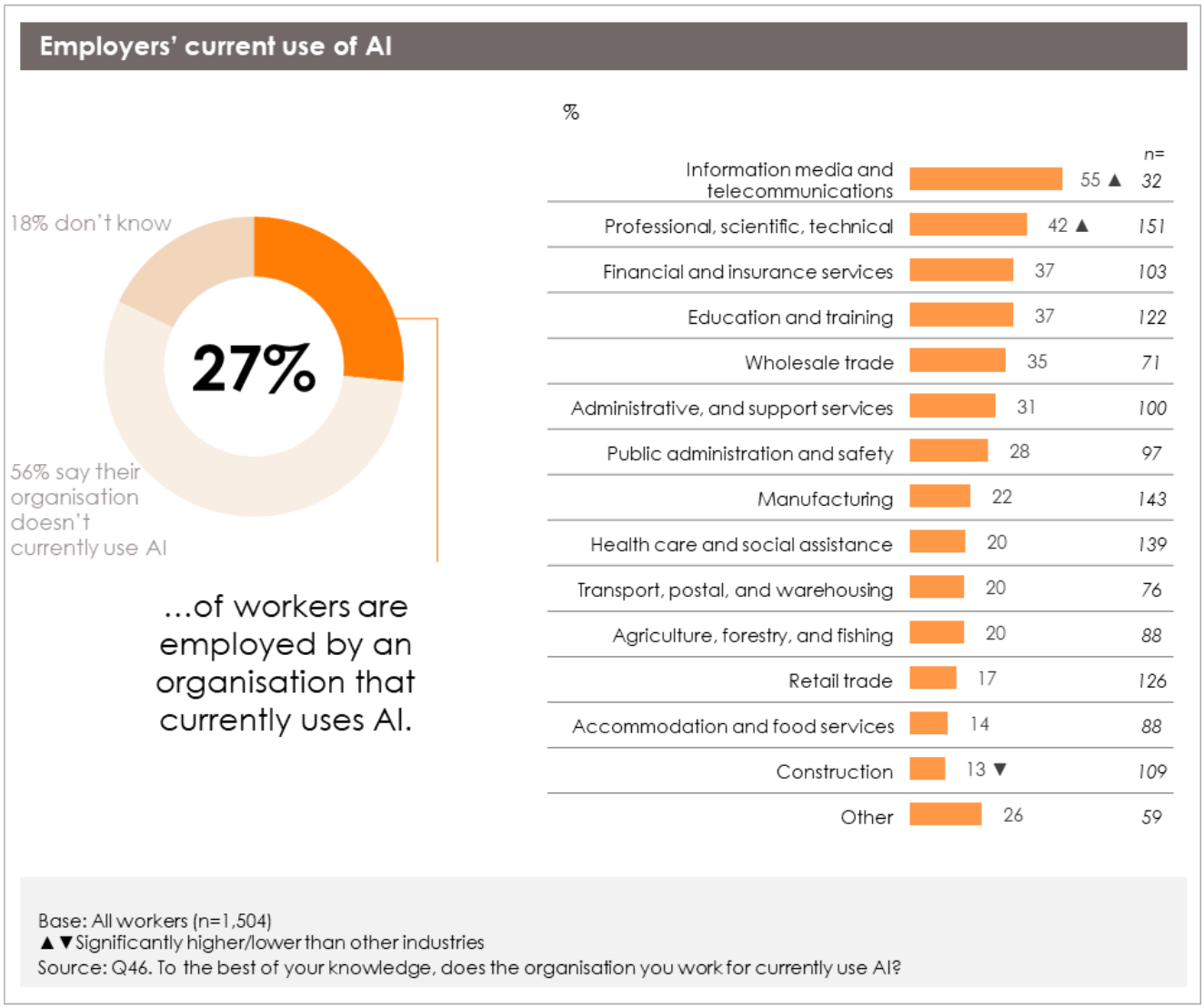
"No matter how familiar you are with the term, please have the following definition in mind when answering the subsequent questions:

Artificial intelligence – or AI – is what enables smart computer programs and machines to carry out tasks that would typically require human intelligence. Some examples of common AI technology are:

- Siri, Alexa, and other smart assistants
- Chat GPT and other large language models
- Netflix or YouTube recommendations
- Self-driving cars
- Algorithmic management systems (e.g., where workload is organised by algorithms)."

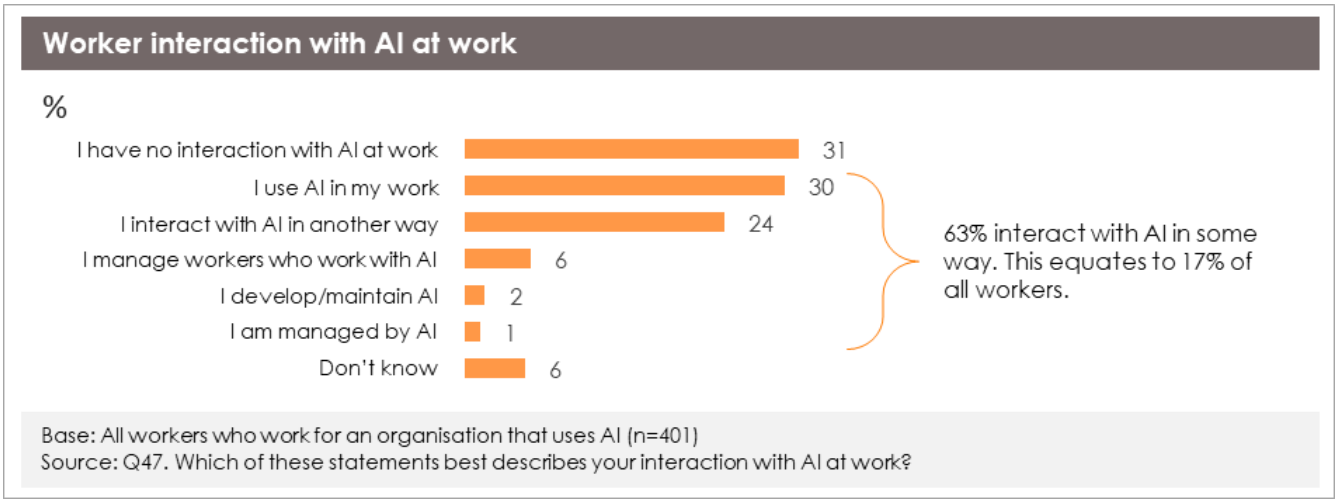
3.3.1. Prevalence of workers working in AI enabled organisations

Around one quarter (27%) of workers are employed by an organisation that currently uses AI. Use is highest in the information, media and telecommunications sector, as well as the professional, scientific, technical sectors.



3.3.2. Worker interaction with AI in AI enabled organisations

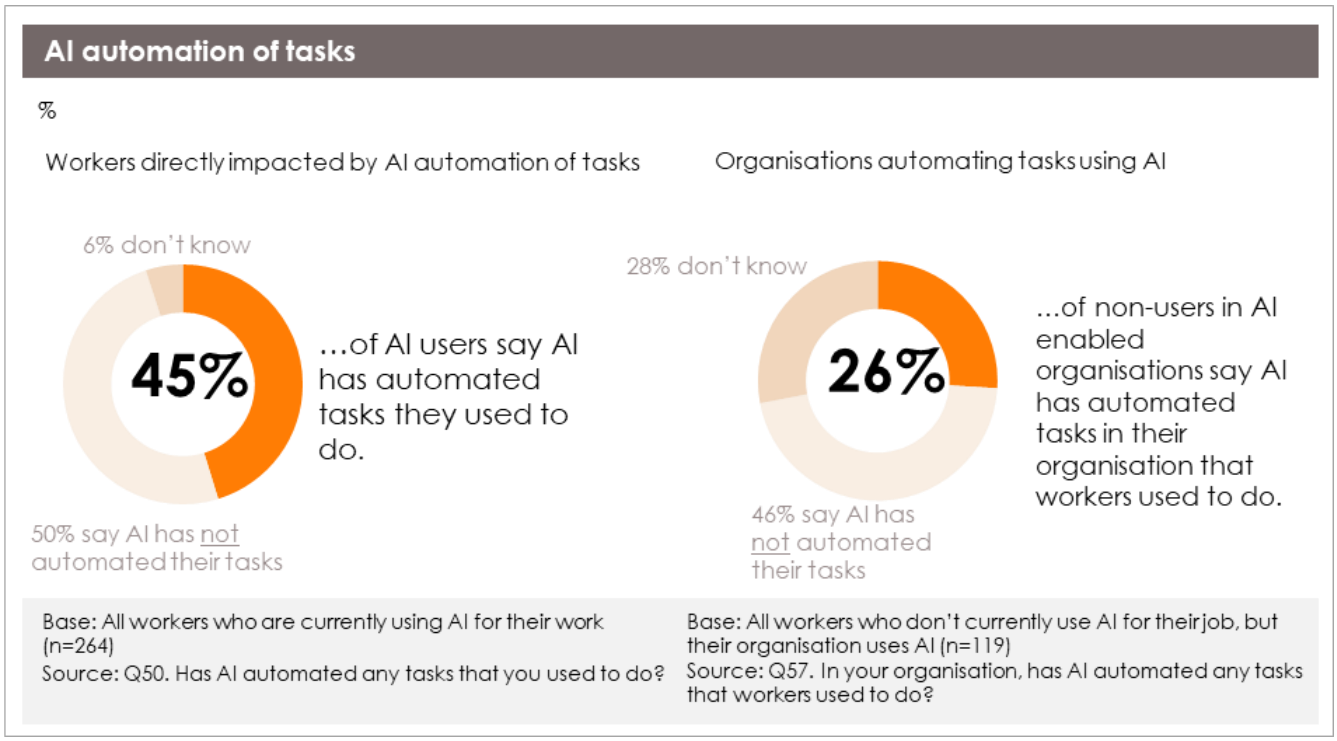
Nearly two thirds (63%) of workers in AI-enabled organisations interact with AI in some way at work. Extrapolating this to the wider worker population, 17% of all workers interact with AI in their job in an AI-enabled organisation – this means the remaining 83% either work at an AI enabled workplace but do not personally use it (9%), they do not work at an AI enabled workplace (56%) or are unsure whether they work at an AI enabled workplace (18%).



3.3.3. AI automation of tasks

Just under half (45%) of workers who use AI for their work report AI has automated tasks they previously did. This equates **to 8% of <u>all workers</u> being personally affected by the AI automation of tasks**.

Around a quarter (26%) of non-users of AI in AI enabled organisations report the AI automation of tasks within the organisation. Using the results from both questions, this means **10% of <u>all workers</u> are employed by an organisation that has automated the tasks of workers**.

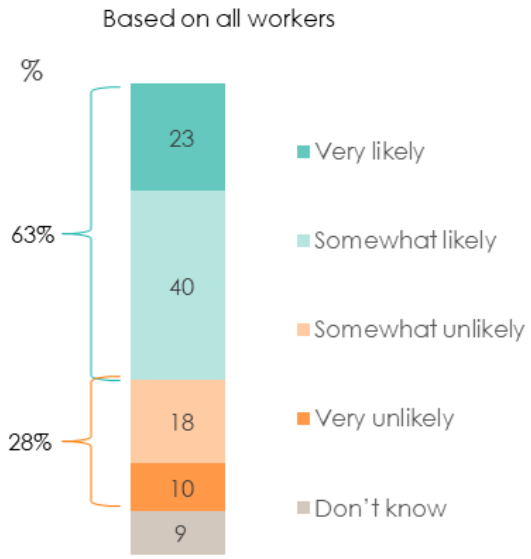


3.3.4. Likelihood of workers using AI in next five years

Nearly two thirds (63%) of all workers think it is very or somewhat likely they will work with AI or interact with AI in some way in their work in the next five years. The likelihood of workers using AI is highest in the information, media and telecommunications[1], financial and insurance services, and education and training services sectors.

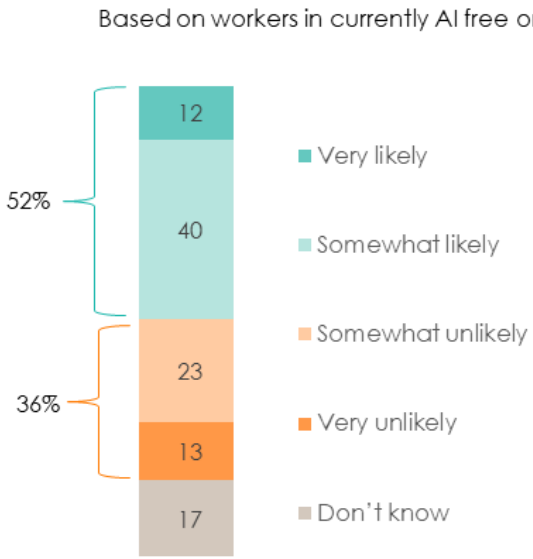
Around half (52%) of workers in organisations that don't currently use AI think they will be very or somewhat likely to use AI at work in the next five years.

Likelihood of worker using AI in work context in next 5 years



Base: All workers (n=1,504)
Source: Q48. How likely do you think it is that you will work with AI or interact with AI in some way in your work in the next 5 years?

Likelihood of workers in currently AI free organisations using AI in 5 years



Base: All workers who say their organisation does not currently use AI (or they are unsure) (n=1,103)
Source: Q48. How likely do you think it is that you will work with AI or interact with AI in some way in your work in the next 5 years?

1 Due to the small base size (n=32), this result is not statistically significantly different from the average..

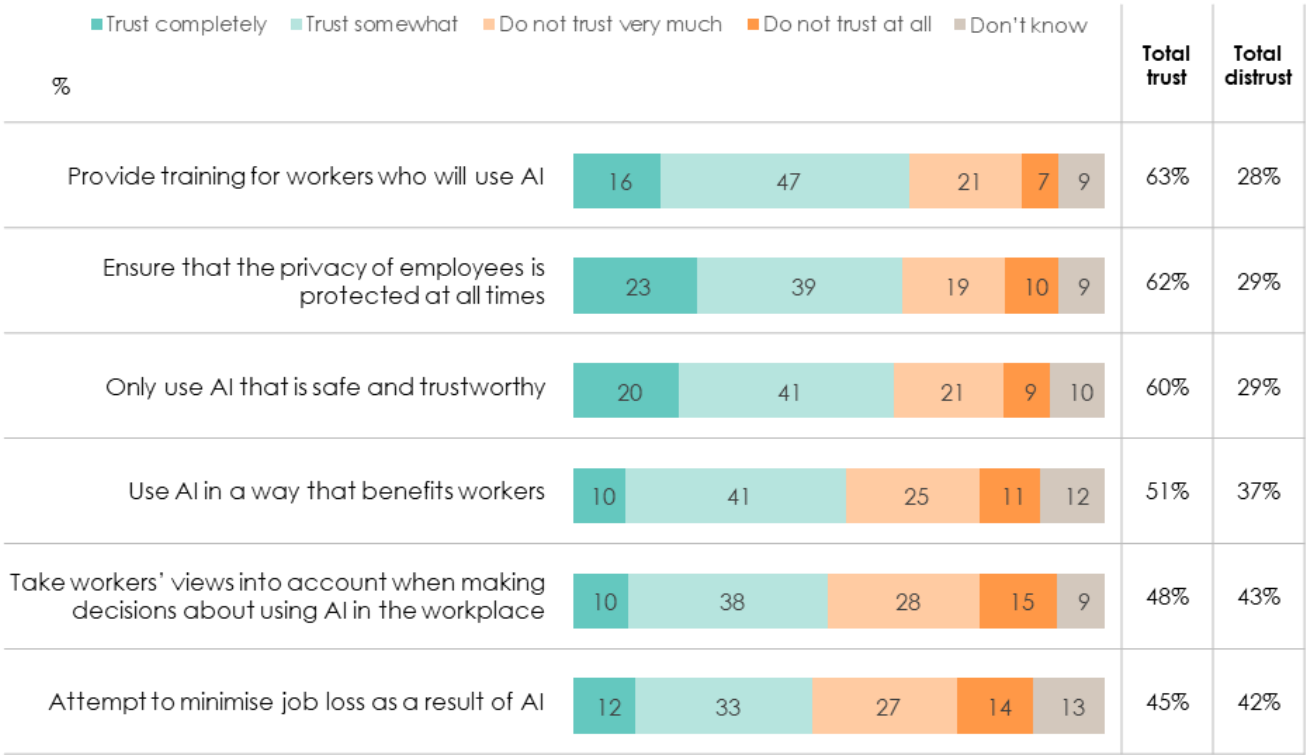
3.4. Expected impact of AI

3.4.1. Worker trust in employers

Worker trust in employer actions and decisions regarding AI adoption is one indicator of AI's potential impact on job quality.

Worker trust is relatively good for matters of training, privacy, and safety aspects of AI adoption. Trust levels are much lower for employers minimising job loss and worker consultation.

Trust in employer adopting AI

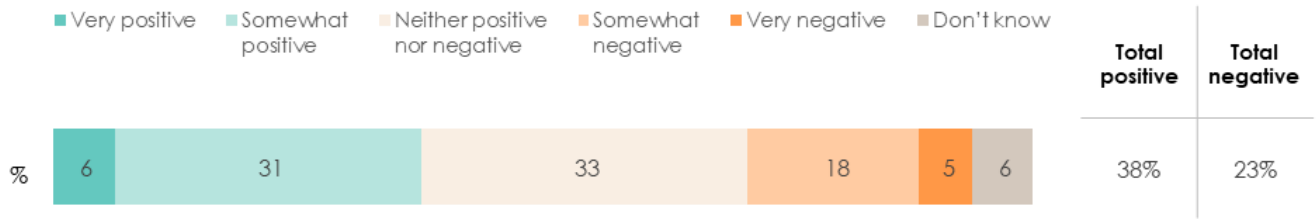


Base: All workers (n=1,504)
Source: Q45. Imagine that your employer was going to adopt AI. To what extent would you trust your employer to…

3.4.2. Expected impact of AI on workers in next 5 years

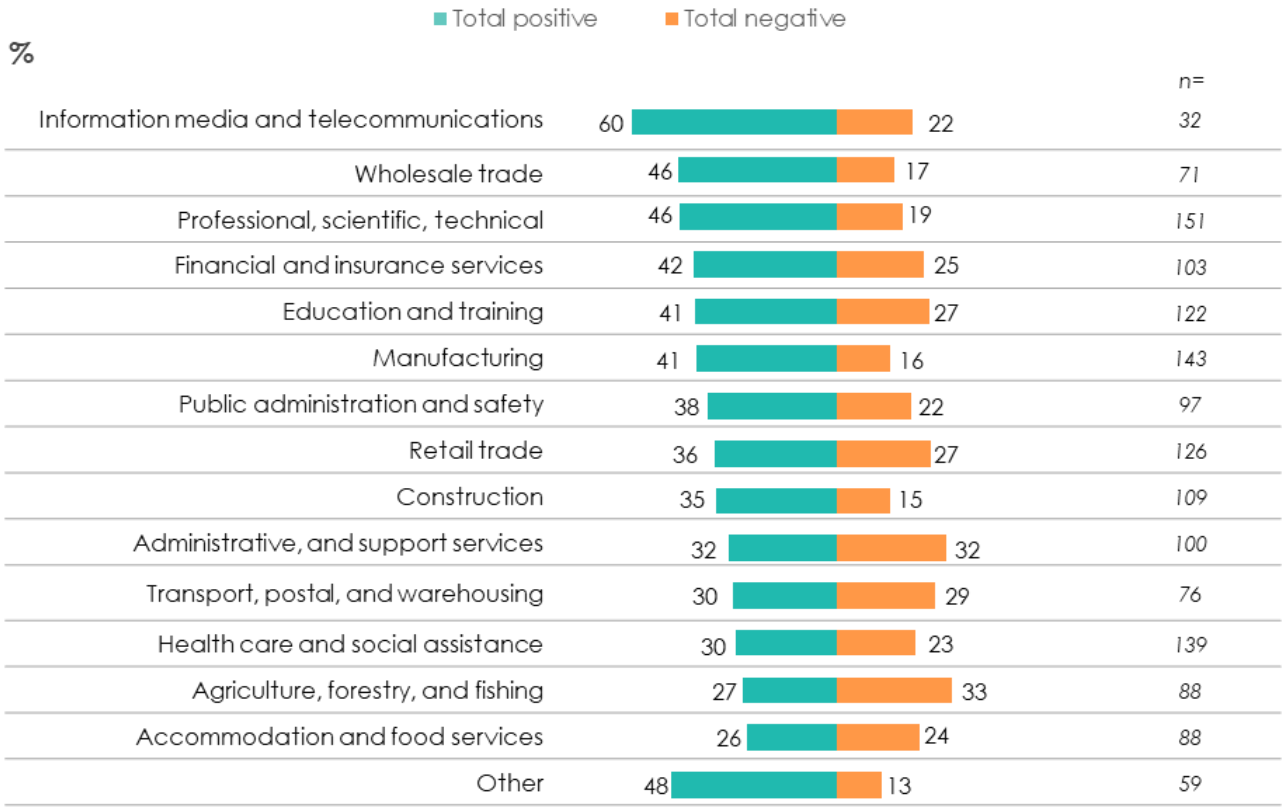
Worker opinion on the overall impact of AI in their sector over the next five years is more positive than negative, with 38% taking a positive view and 23% taking a negative view. The remainder take a neutral stance or are unsure. Agriculture, forestry and fishing is the only sector where workers are more negative than positive about the likely sector impact of AI.

Expected impact of AI on workers in next 5 years (all workers)



Base: All workers (n=1,504)
Source: Q42. Thinking about the next 5 years, do you think that AI is likely to have a positive or negative impact on workers in your sector?

Expected impact of AI on workers in next 5 years (by sector)



Base: All workers (n=1,504)
▲▼Significantly higher/lower than other industries
Source: Q42. Thinking about the next 5 years, do you think that AI is likely to have a positive or negative impact on workers in your sector?

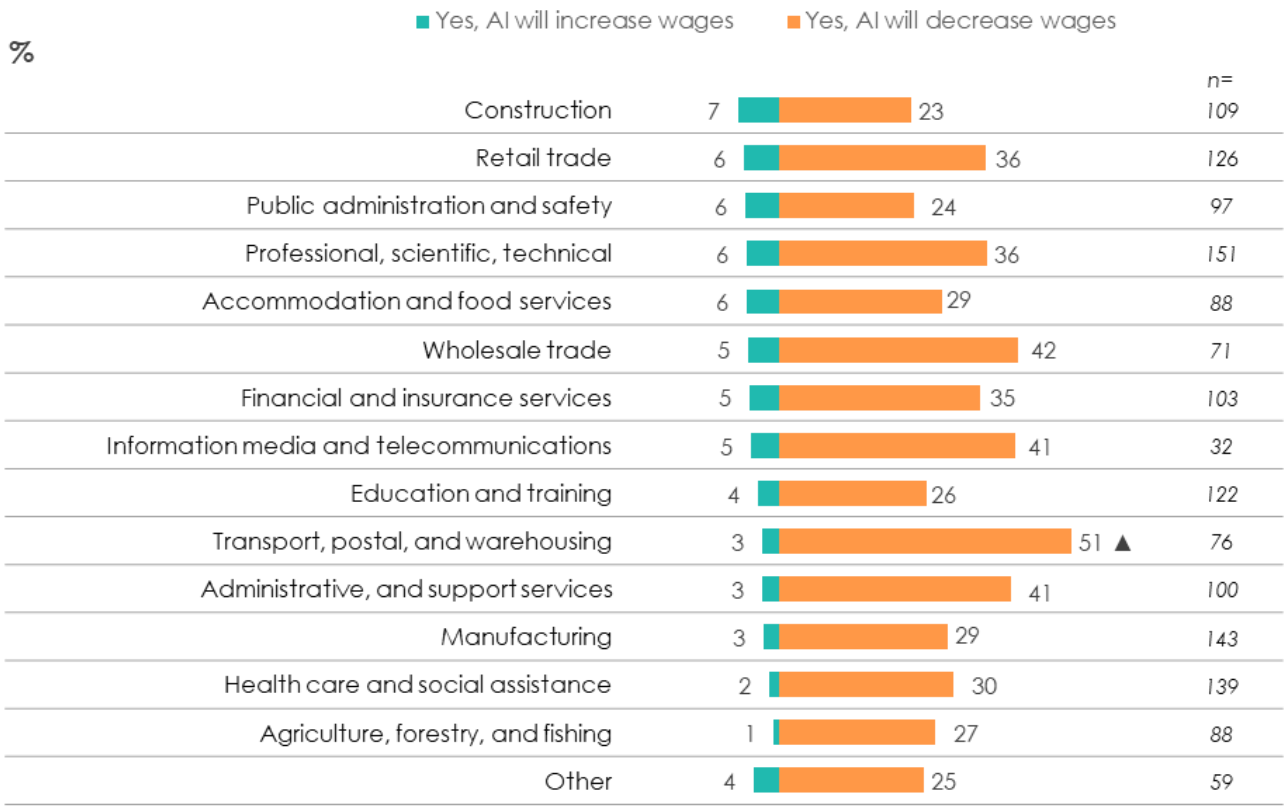
3.4.3. Expected impact of AI on wages

Although workers are largely positive (or neutral) about the impact of AI on workers, they take a more pessimistic view on how AI will affect wages. Around one third (32%) of workers believe AI will decrease wages in the next five years, with a similar proportion predicting a neutral impact (31%) and just four percent believing AI will increase wages. Worker belief that AI will result in lower wages is most common in transport, postal and warehousing.

Expected impact of AI on wages in sector (all workers)

Base: All workers (n=1,504)
Source: Q43. Thinking about the next 5 years, do you think that AI will have an impact on wages in your sector?

Expected impact of AI on wages in sector (by sector)



Base: All workers (n=1,504)
▲▼Significantly higher/lower than other industries
Source: Q43. Thinking about the next 5 years, do you think that AI will have an impact on wages in your sector?

3.4.4. Expected impact of AI on job quality

The charts on this page and overleaf display workers' experiences, observations and expectations of the impact of AI on job performance and enjoyment, worker safety and wellbeing, and employer treatment.

Workers who already interact with AI in a work context are most positive about the impacts, especially on job performance (61% believe AI has improved their job performance) and enjoyment (this has improved for 35% and worsened for just 9%).

Worker safety and wellbeing impacts are less common for AI users, but where AI has impacted this the effect has been more positive than negative.

Non-users of AI appear most concerned about the negative impacts of AI on worker mental health and wellbeing (20% of non-users in AI free organisations expect this and 16% of non-users in AI enabled organsiations observe this).

Non-users in AI enabled organisations are the worker group most hesitant about seeing the positive impacts of AI.

Perceived impact of AI on job performance, worker wellbeing, and employer treatment

%

Improved it a lot | Improved it a little | No effect | Worsened it a little | Worsened it a lot | Don't know

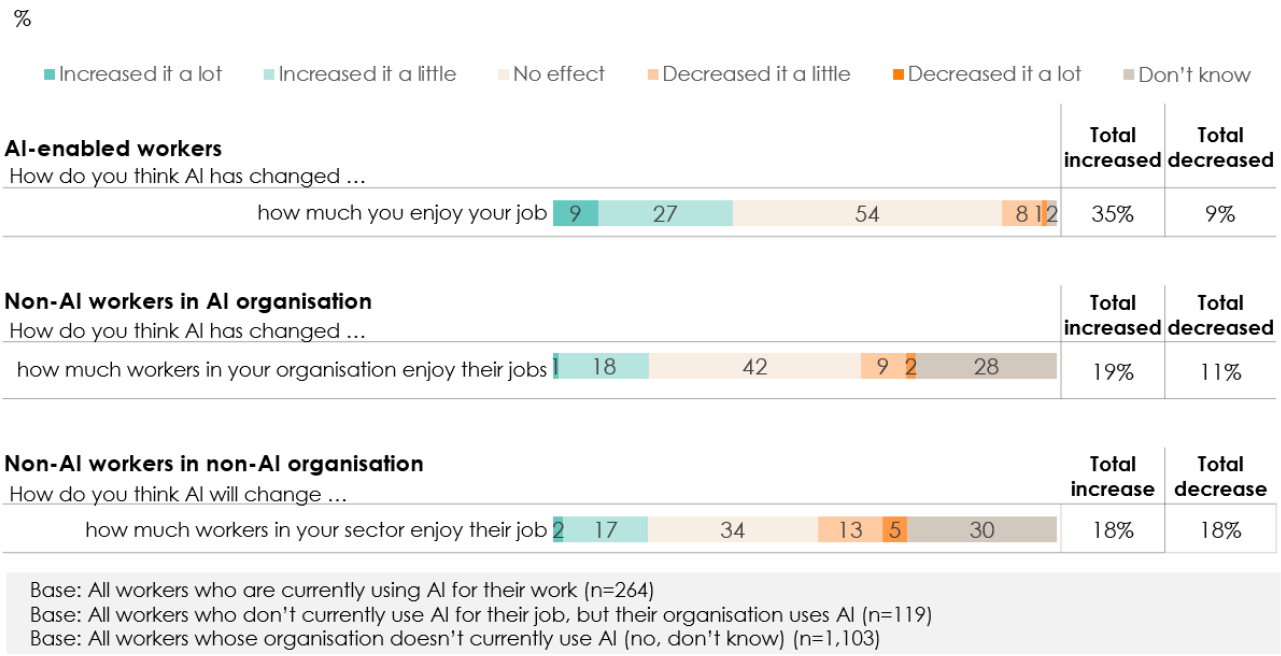
AI-enabled workers How do you think AI has changed...	Improved it a lot	Improved it a little	No effect	Worsened it a little	Worsened it a lot	Don't know	Total improved	Total worsened
your own job performance	16	44	34	3	2		61%	3%
your mental health and wellbeing in the workplace	8	14	66	8	1	3	22%	9%
your physical health and safety in the workplace	5	12	74	2	6		17%	3%
how fairly your manager or supervisor treats you	5	6	77	6	2	4	11%	8%

Non-AI workers in AI organisation How do you think AI has changed...	Improved it a lot	Improved it a little	No effect	Worsened it a little	Worsened it a lot	Don't know	Total improved	Total worsened
the job performance of workers in your organisation	2	22	38	10	1	28	23%	11%
the mental health and wellbeing of workers in your organisation	8	47	15	2		28	8%	16%
the physical health and safety of workers in your organisation	9	49	6	1		35	9%	8%
how fairly managers or supervisors in your organisation treat workers	2	64	7	2		26	2%	9%

Non-AI workers in non-AI organisation How do you think AI will change...	Improved it a lot	Improved it a little	No effect	Worsened it a little	Worsened it a lot	Don't know	Total improve	Total worsen
the job performance of workers in your sector	3	28	29	9	4	26	31%	13%
the mental health and wellbeing of workers in your sector (e.g. will it affect stress or anxiety levels)	1	15	34	14	7	30	16%	20%
the physical health and safety of workers in your sector	2	18	40	6	4	30	20%	10%
how fairly managers or supervisors in your sector treat workers	1	9	41	13	5	31	10%	18%

Base: All workers who are currently using AI for their work (n=264)
Base: All workers who don't currently use AI for their job, but their organisation uses AI (n=119)
Base: All workers whose organisation doesn't currently use AI (no, don't know) (n=1,103)

Impact of AI on job enjoyment



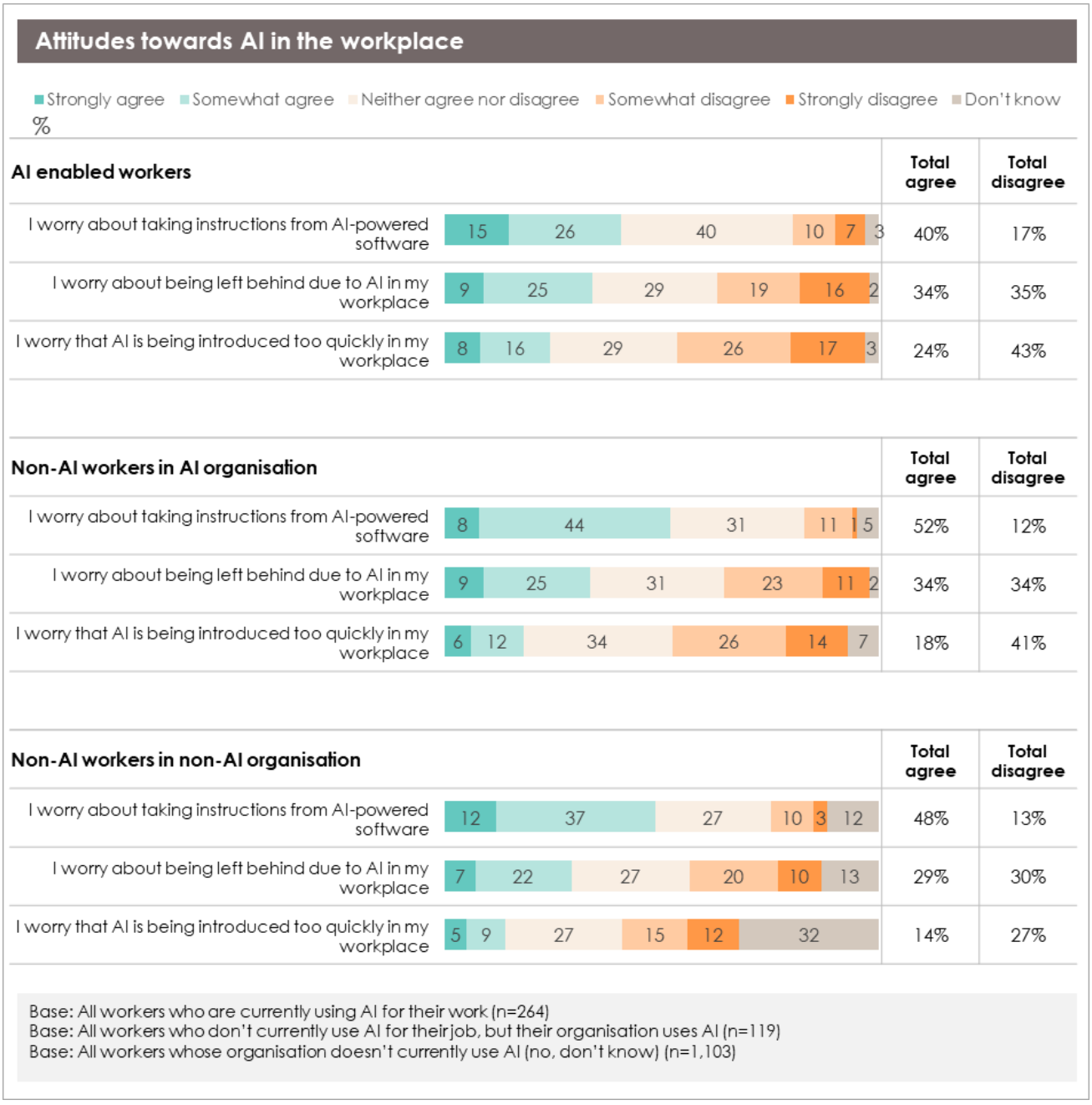
Base: All workers who are currently using AI for their work (n=264)
Base: All workers who don't currently use AI for their job, but their organisation uses AI (n=119)
Base: All workers whose organisation doesn't currently use AI (no, don't know) (n=1,103)

3.4.5. Attitudes towards AI in the workplace

We measured two specific concerns about AI: taking instructions from AI-powered software and employers introducing AI too quickly in the workplace.

Between four and five out of every ten workers (40% to 52%) are worried about taking instructions from AI-powered software. Current users are less worried about this than non-users.

Worker fear of being 'left behind' and the rapid implementation of AI are less common fears, although current users are more likely to worry about the latter than non-users.



4. Workers' perceived employment security

This chapter covers workers' confidence in their future financial security and their prospects of losing their job.

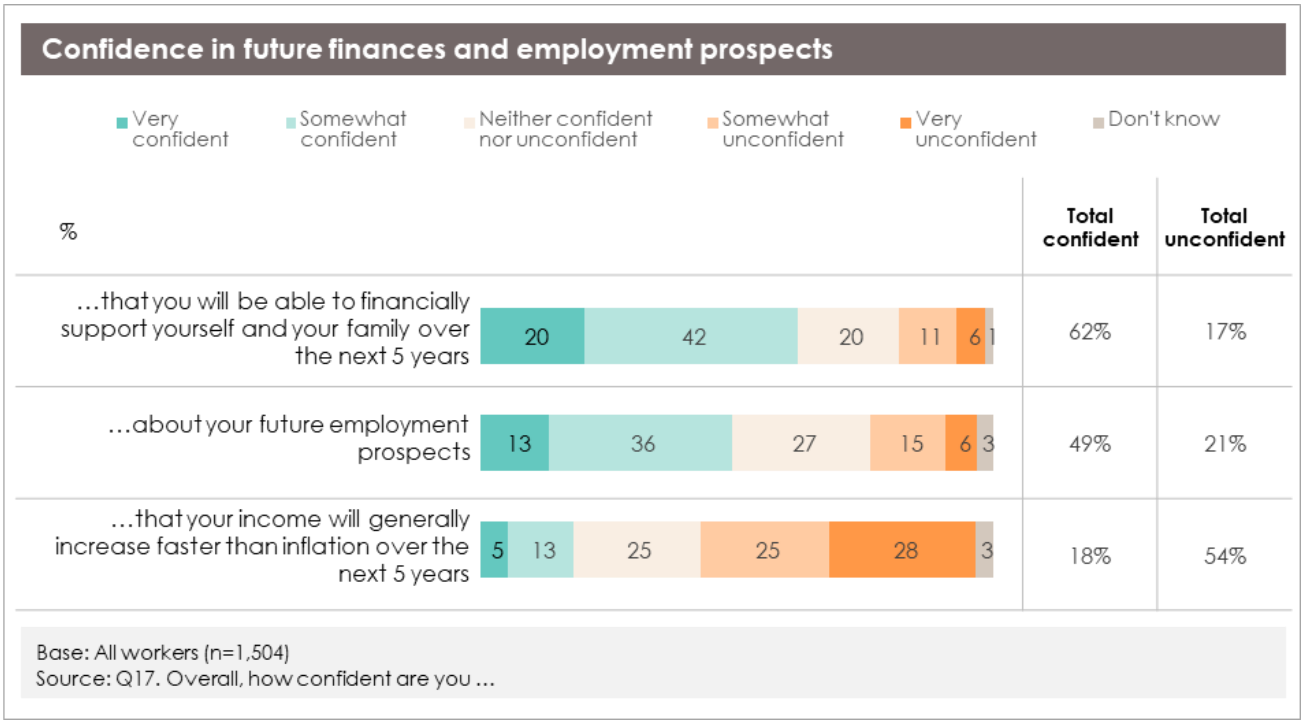
4.1. Overall confidence in employment prospects and financial support

Around six in ten (62%) workers are confident they will be able to financially support themselves and their family over the next five years. Low income workers are less confident about this (49% of workers with a personal income under $60,000 are confident versus 68% of workers with a personal income of $60,000 or more).

Only around half (49%) of workers are confident about their future employment prospects. One in five (21%) workers are unconfident.

Lack of confidence about future employment prospects is more prevalent among low income workers (38% of workers with a personal income under $60,000 are confident versus 54% of workers with a personal income of $60,000 or more).

Relatively few (18%) workers believe their income will outpace inflation over the next five years.



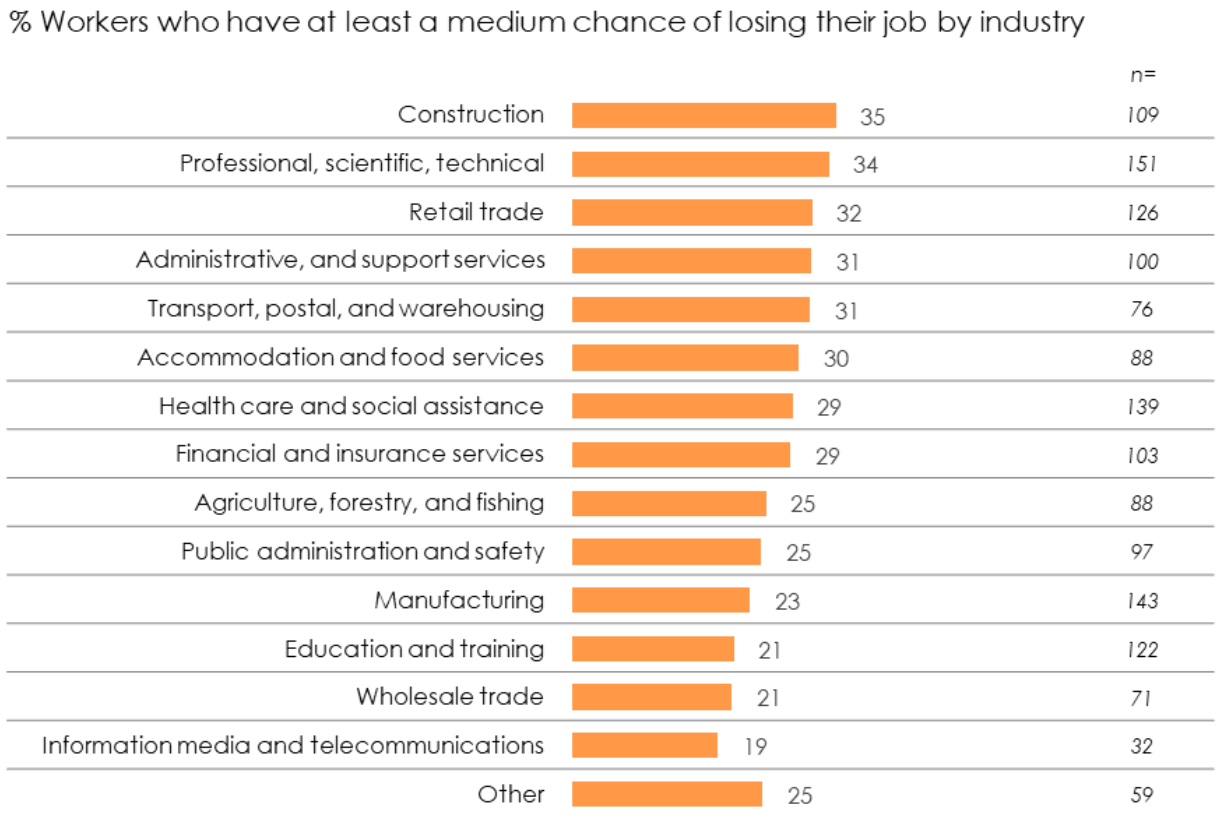
4.2. Prospect of losing main job

Nearly three in ten (28%) workers believe they have at least a medium chance of losing their main job for a reason beyond their control in the next 12 months. Younger workers are most vulnerable, with 37% of workers under 30 saying they have least a medium chance.

Perceived chance of losing main job in next 12 months

Base: All workers (n=1,504)
Source: Q11. In the next 12 months, what do you think is the chance that you could lose your main job for a reason beyond your control?

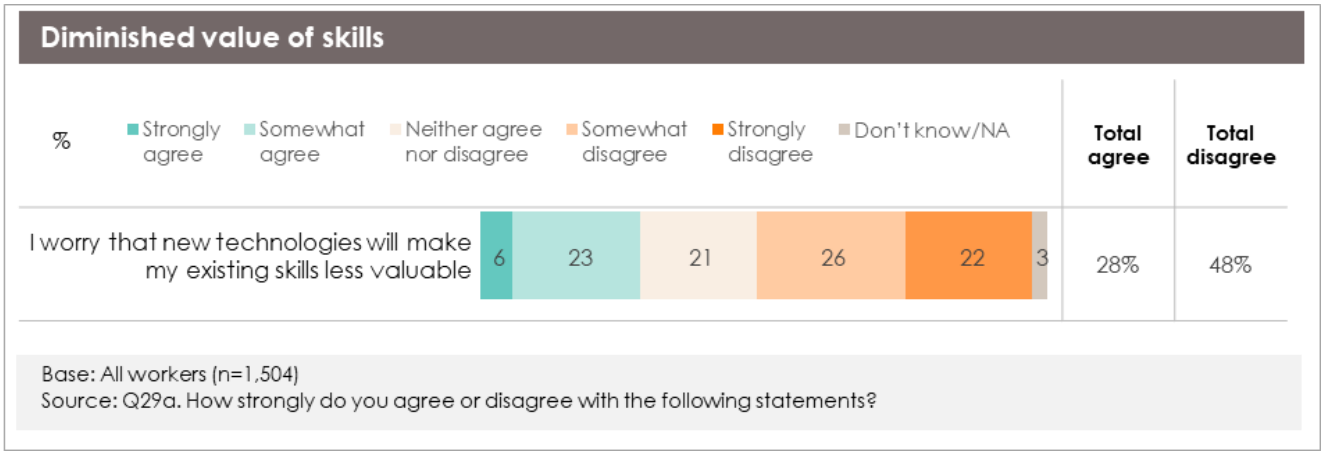
Perceived chance of losing main job in next 12 months by industry



Base: All workers (n=1,504)
Source: Q11. In the next 12 months, what do you think is the chance that you could lose your main job for a reason beyond your control?

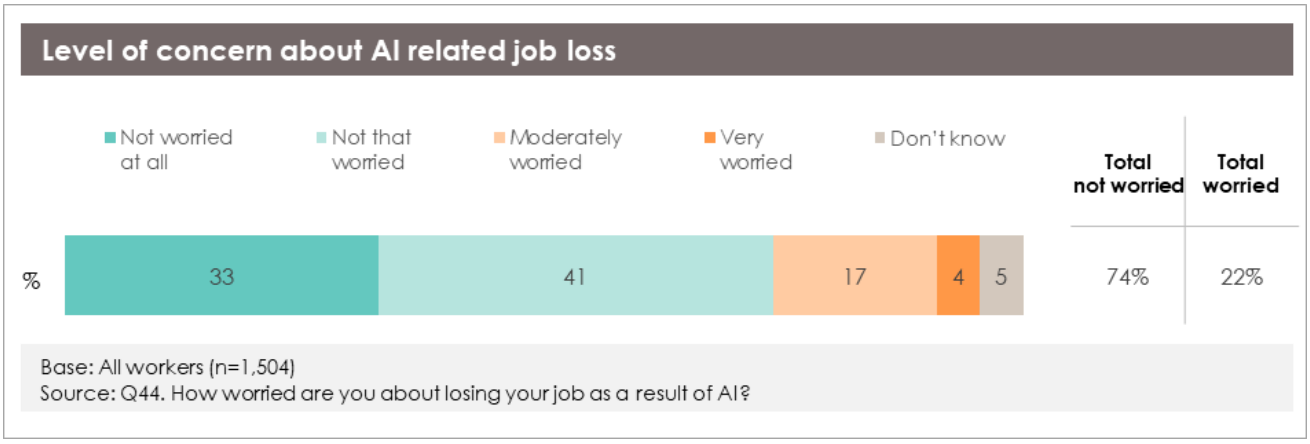
4.3. Diminished value of skills

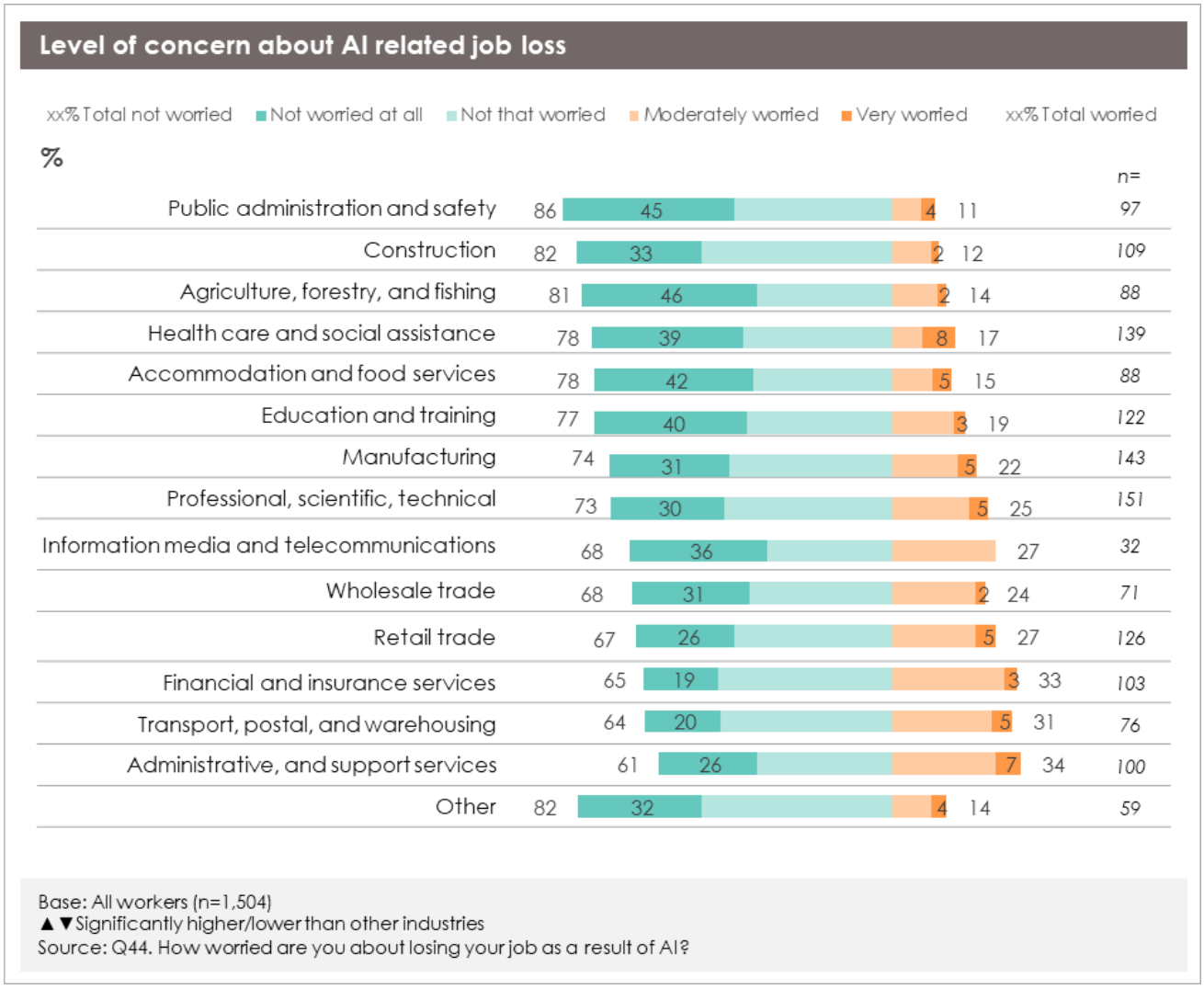
Over a quarter (28%) of workers worry that new technologies will make their existing skills less valuable.



4.4. AI inflicted job losses

Around one in five (22%) workers are worried about losing their job because of AI. This varies by industry, with worker concern greater in administrative and support services, transport, postal and warehousing, and financial and insurance services.

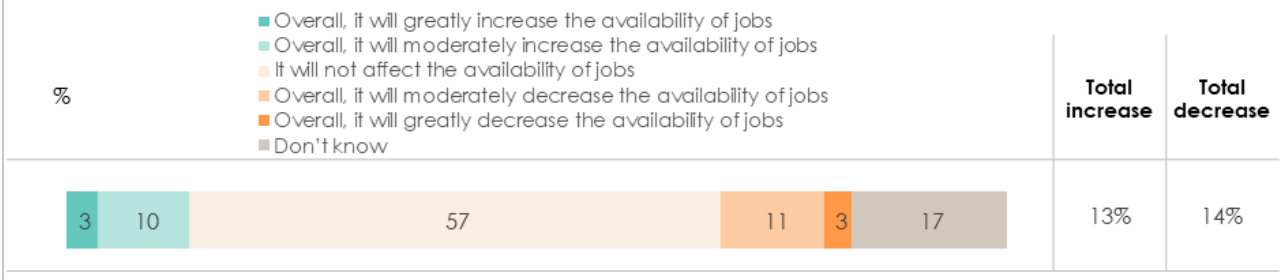




4.5. Expected impact of climate change on job availability

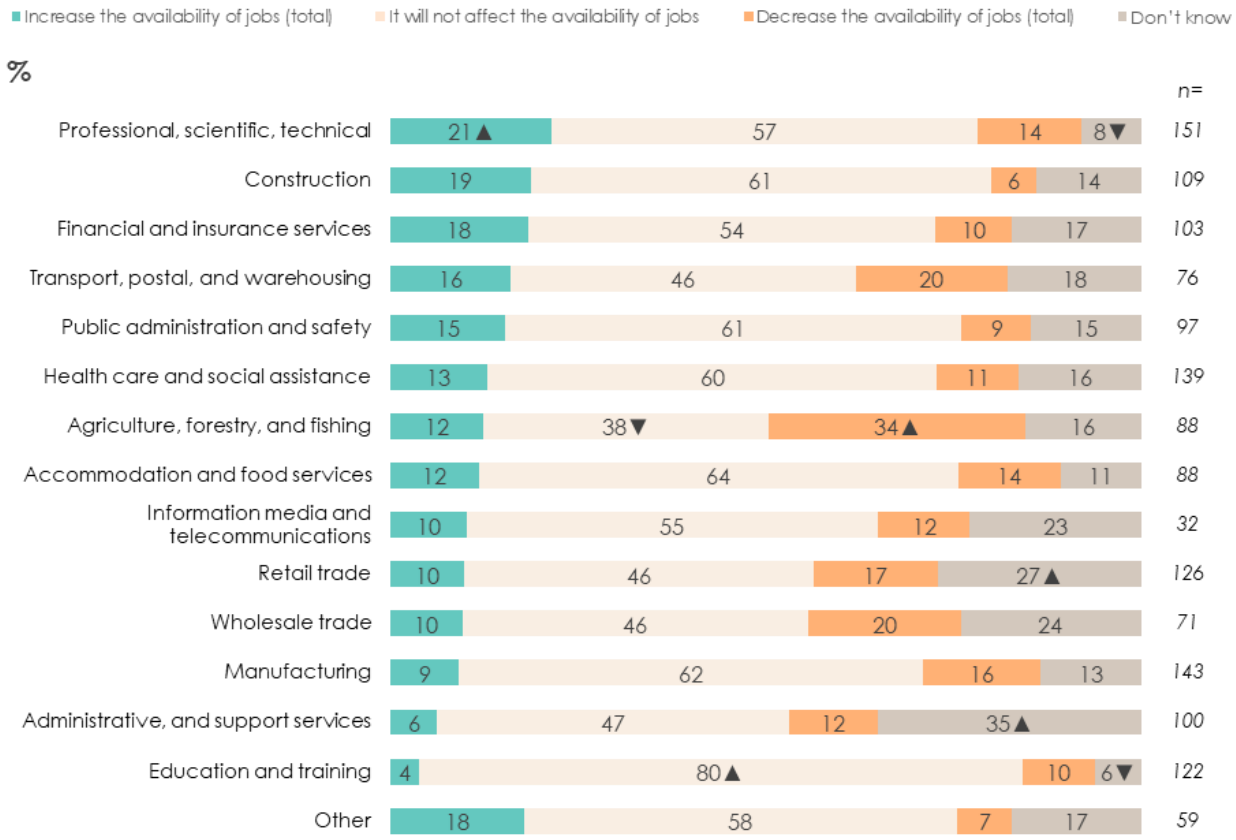
Most workers think climate change won't affect the availability of jobs or are unsure. The remaining opinion is polarised, with 13% expecting climate change to increase the availability of jobs and 14% expecting it to decrease availability. Concern about climate change decreasing the availability of jobs is notably highest in the agriculture, forestry and fishing sector.

Expected impact of climate change on jobs



Base: All workers (n=1,504)
Source: Q19. What kind of effect do you think climate change and/or decarbonisation will have on the availability of jobs in your sector?

Expected impact of climate change on jobs in sector



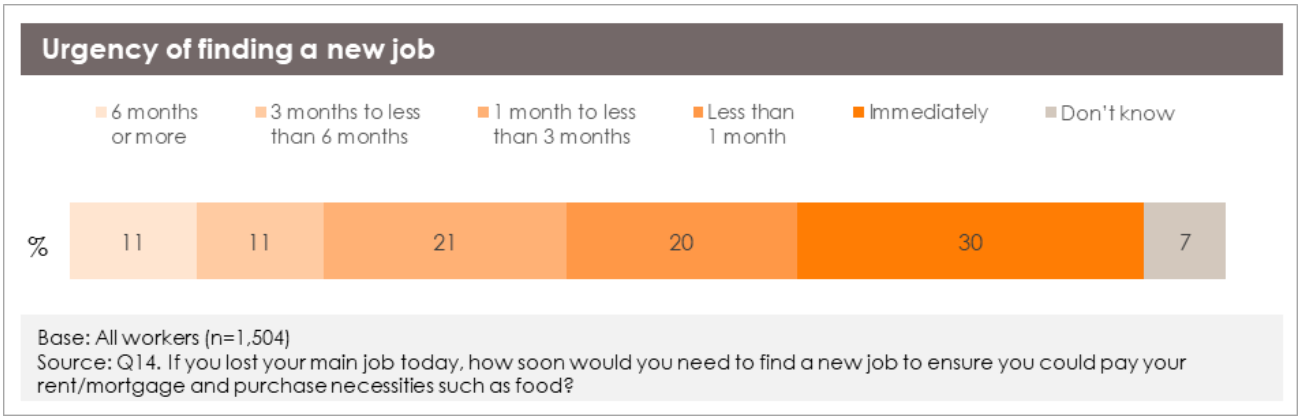
Base: All workers (n=1,504)
▲▼Significantly higher/lower than other industries
Source: Q19. What kind of effect do you think climate change and/or decarbonisation will have on the availability of jobs in your sector?

5. Worker capacity to cope with disruption and change

This chapter covers workers' capacity to cope with disruption and change. We examine the immediacy with which another job is needed, workers' perceptions of the ease of getting another job, the role of redundancy payments, and worker confidence in accessing support to get a job.

5.1. Urgency of replacing job for financial reasons

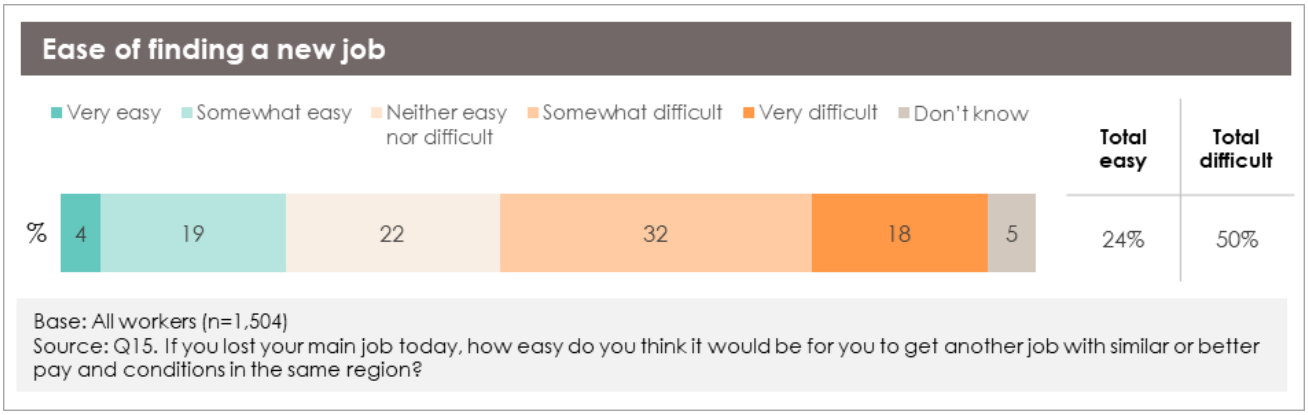
Half of workers would need a new job either immediately or within a month of losing their main job. This level of urgency is more prevalent among women (55% versus 46% of men).



Base: All workers (n=1,504)
Source: Q14. If you lost your main job today, how soon would you need to find a new job to ensure you could pay your rent/mortgage and purchase necessities such as food?

5.2. Perceived ease of securing another job

Half of workers (50%) feel it would be difficult to find another job in the same region that offers comparable or better pay and conditions. Perceived difficulty is more prevalent outside of Auckland (54% versus 40% of Auckland workers).

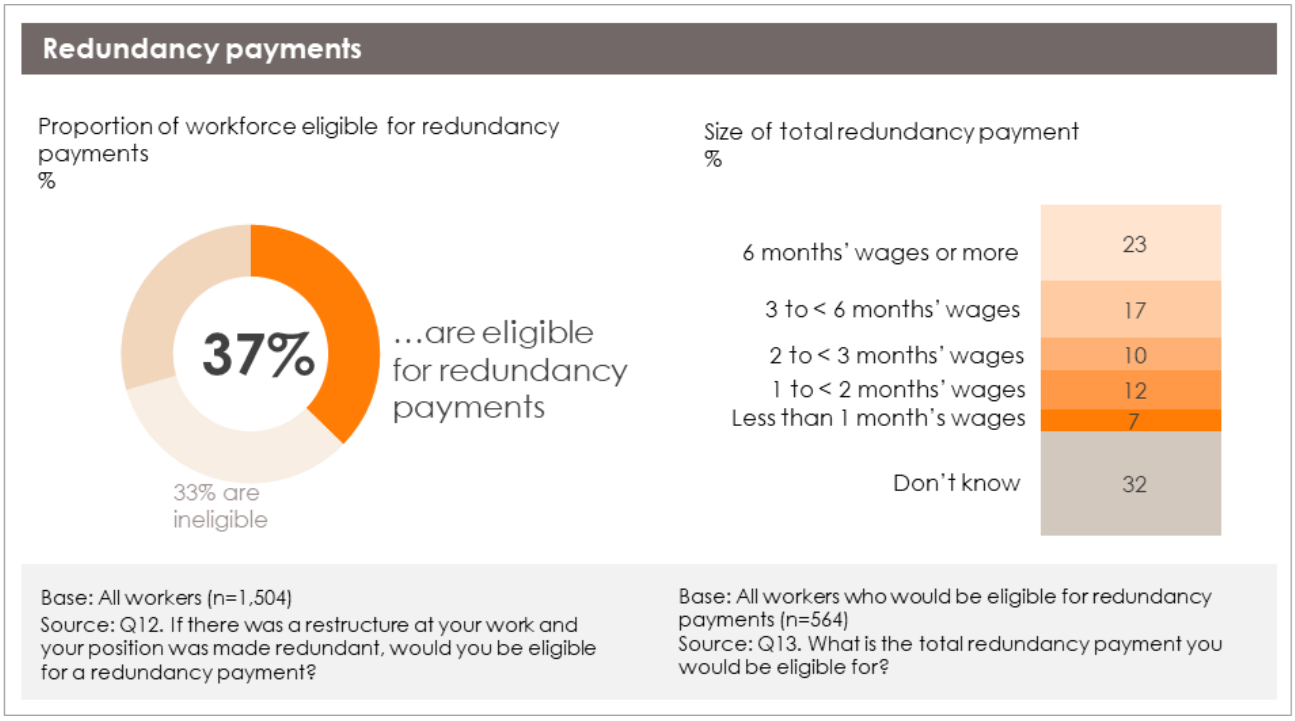


Base: All workers (n=1,504)
Source: Q15. If you lost your main job today, how easy do you think it would be for you to get another job with similar or better pay and conditions in the same region?

5.3. Redundancy payments

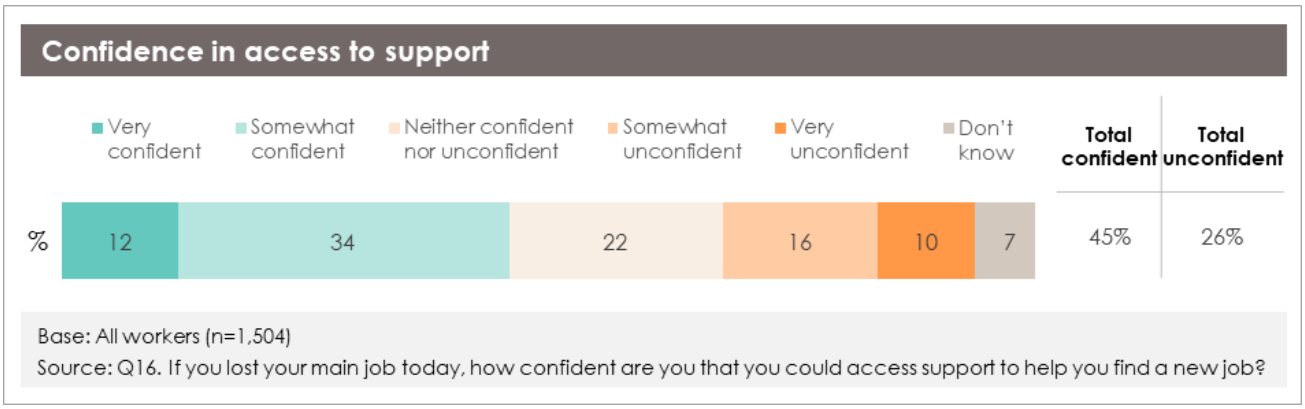
Less than four in ten (37%) workers are eligible for redundancy payments. Eligibility is especially low among low income workers (12% of workers with a personal income under $40,000), part-time workers (17%), and workers in small businesses (14% in businesses with less than 20 employees). Trade union members are much more likely than non-members to be eligible for redundancy payments (53% versus 34%).

Forty percent of workers who are eligible for redundancy payments would be eligible for at least three months' wages. This equates to 15% of all workers.



5.4. Confidence in accessing support to find new job

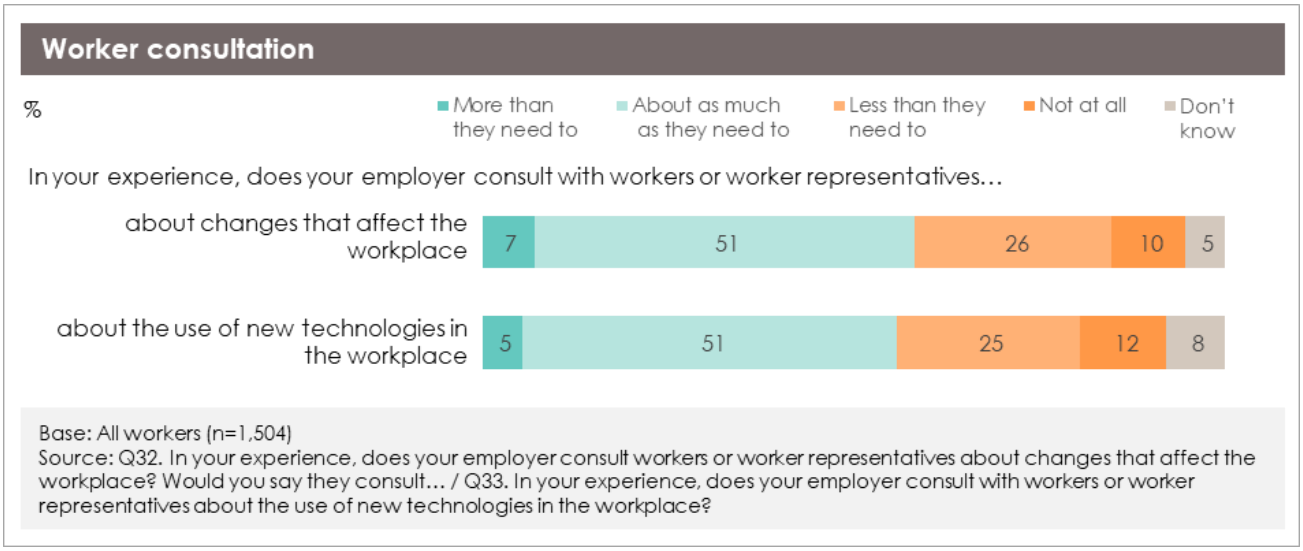
While just under half (45%) of workers are confident in accessing support to find a new job, 26% are unconfident. This is fairly consistent across demographic groups.



5.5. Worker consultation

Worker consultation is an important component in enhancing workers' capacity to cope with disruption and change for many reasons (e.g. identifying skill gaps and training needs).

Just over half of workers in NZ report that their employer consults adequately with workers or worker representatives about changes that affect the workplace (58%). Similarly, over half report adequate consultation on the use of new technologies in the workplace (56%).

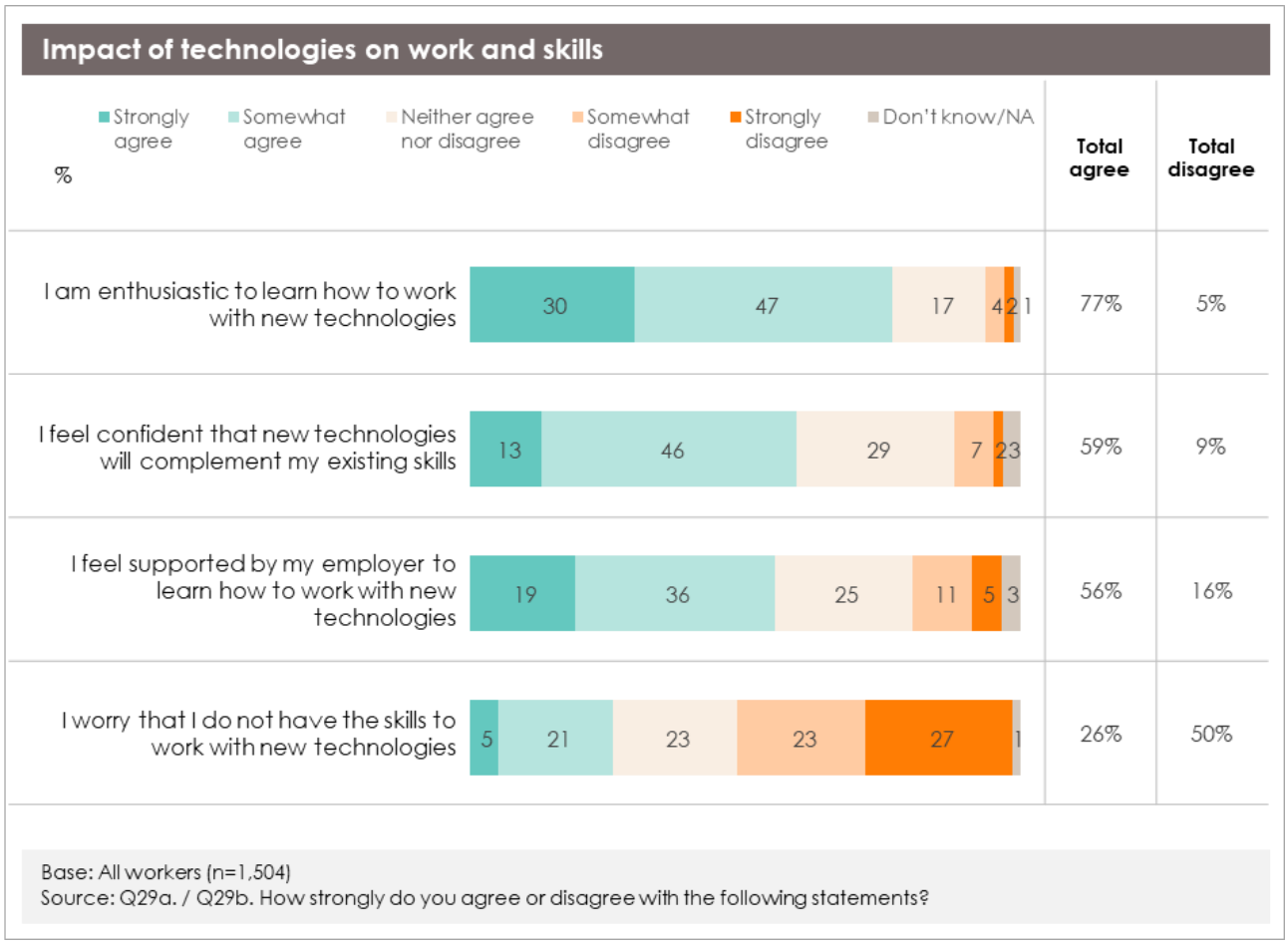


5.6. Worker attitudes towards working with new technologies

A worker's capacity to cope with technological changes is partly influenced by their current attitudes and skills, employer support to develop new skills, and the strength of institutional supports such as social welfare, income insurance, and active labour market programmes.

More than three quarters (77%) of workers are enthusiastic to learn how to work with new technologies. However, fewer (56%) currently feel supported by their employer to do this.

Similarly, over half (59%) of workers are confident that new technologies will complement their existing skills. However, more than a quarter (26%) express concern about their lack of existing skills to cope with the technology changes.



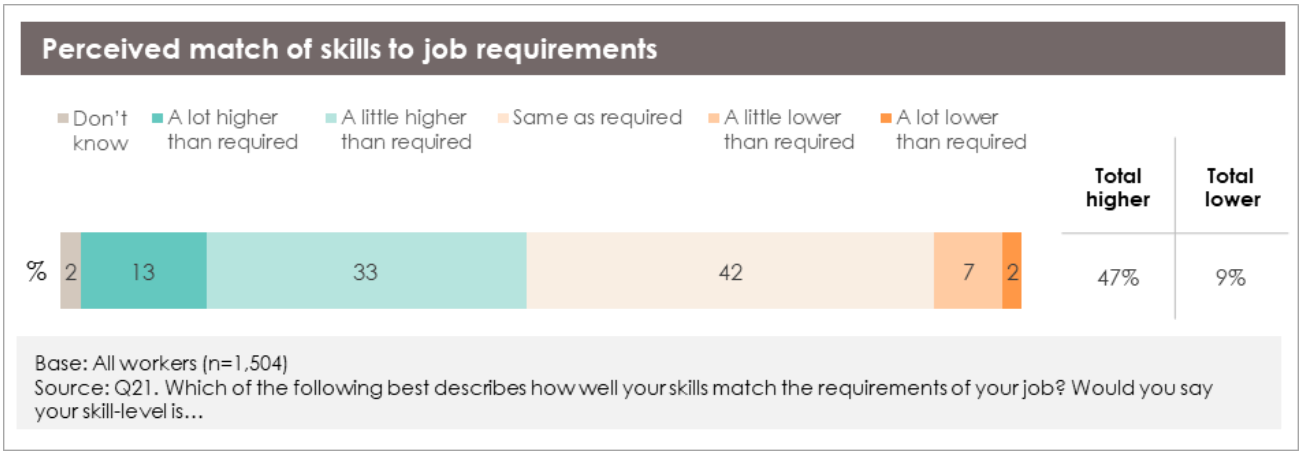
6. Education and skills training needs

Education and skills training are critical to workers coping with technological and other change. This section assesses worker perceptions of how well their skills and qualifications match their job requirements, as well as gaps in and barriers to training, education and professional development.

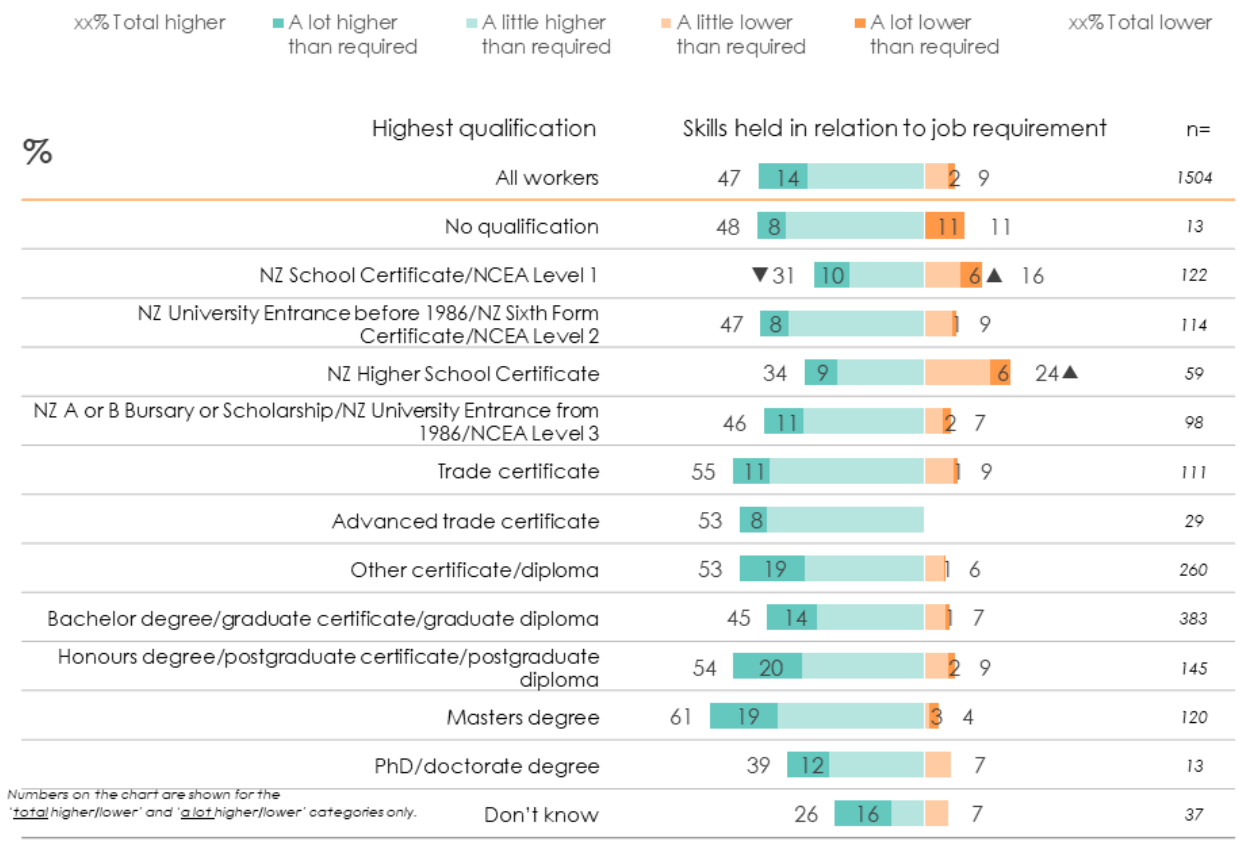
6.1. Perceived match of skills to job requirements

Nearly half (47%) of workers feel their skills exceed what is needed for their current job, 42% view their skills as a good match to job requirements, and less than one in ten (9%) feel they are under-skilled for the job.

The chart below shows that workers with higher education qualifications are more likely to feel overqualified than workers with lower education qualifications.



Perceived match of skills to job requirements (by highest education qualification)



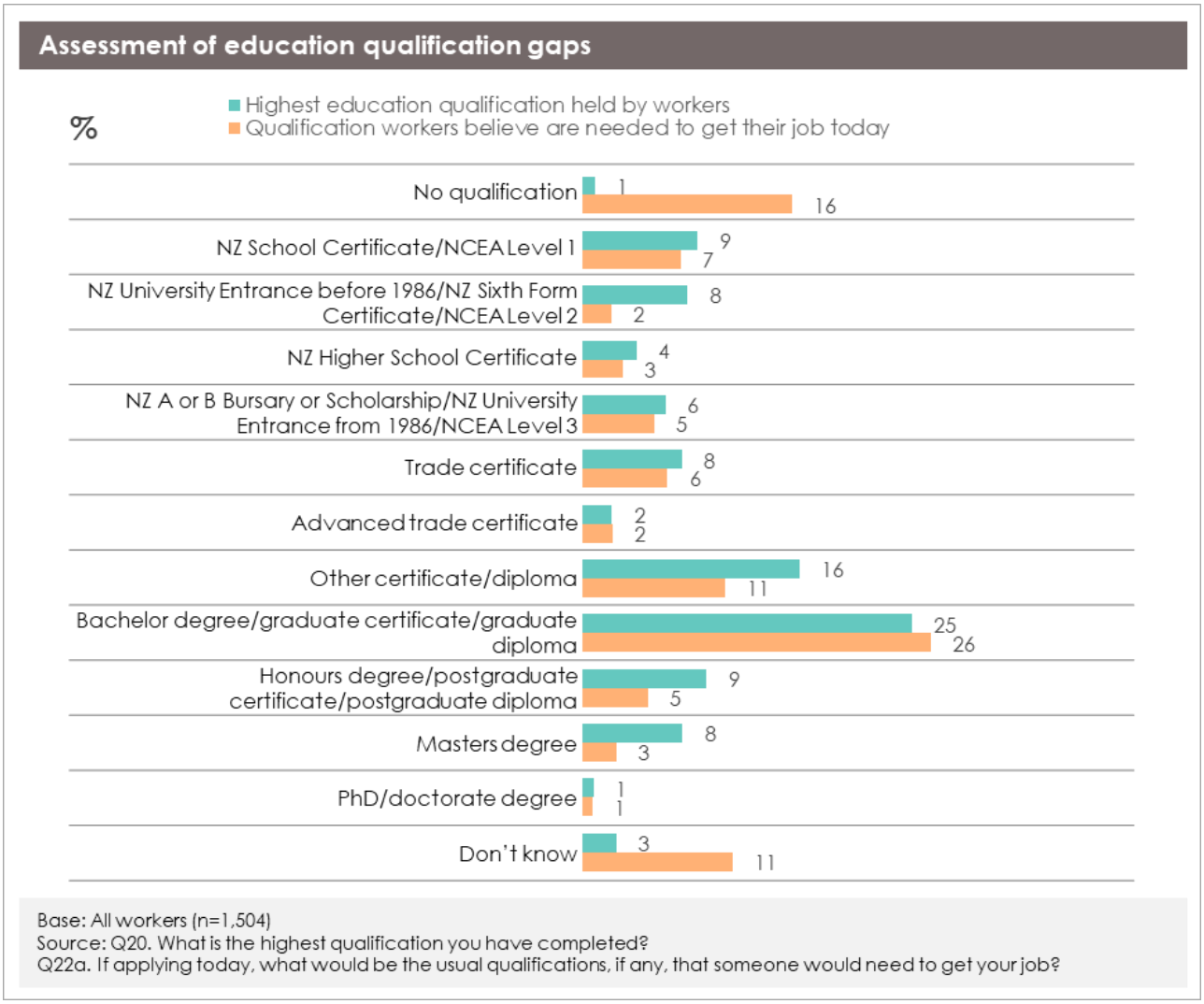
Base: All workers (n=1,504)
▲▼Significantly higher/lower than other qualifications
Source: Q20. What is the highest qualification you have completed? Q21. Which of the following best describes how well your skills match the requirements of your job? Would you say your skill-level is…

6.2. Comparison of current worker qualifications and industry standard requirements

This next chart shows two sets of results:

1. The prevalence of workers' highest education qualifications. For example, 8% of workers surveyed reported they hold a master's degree.
2. Workers' perceptions of what the usual qualifications are that someone would need to get their job. For example, 3% of workers believe someone would need a master's degree to get their job.

A comparison of these two measures shows some workers feel they are overqualified for their job. This is fairly consistent across demographics.

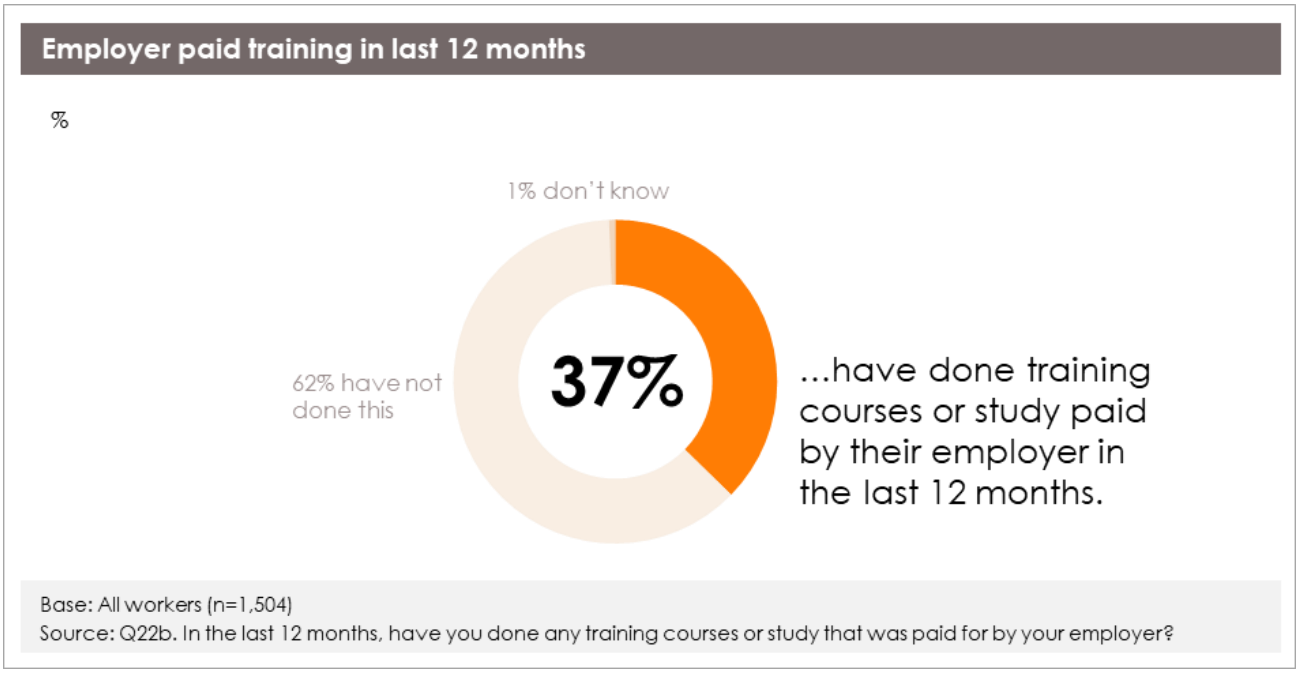


6.3. Confidence in access to training for career development

Just over half (56%) of workers are confident they could access training to develop their careers. Around one in six (17%) workers lack confidence in this.

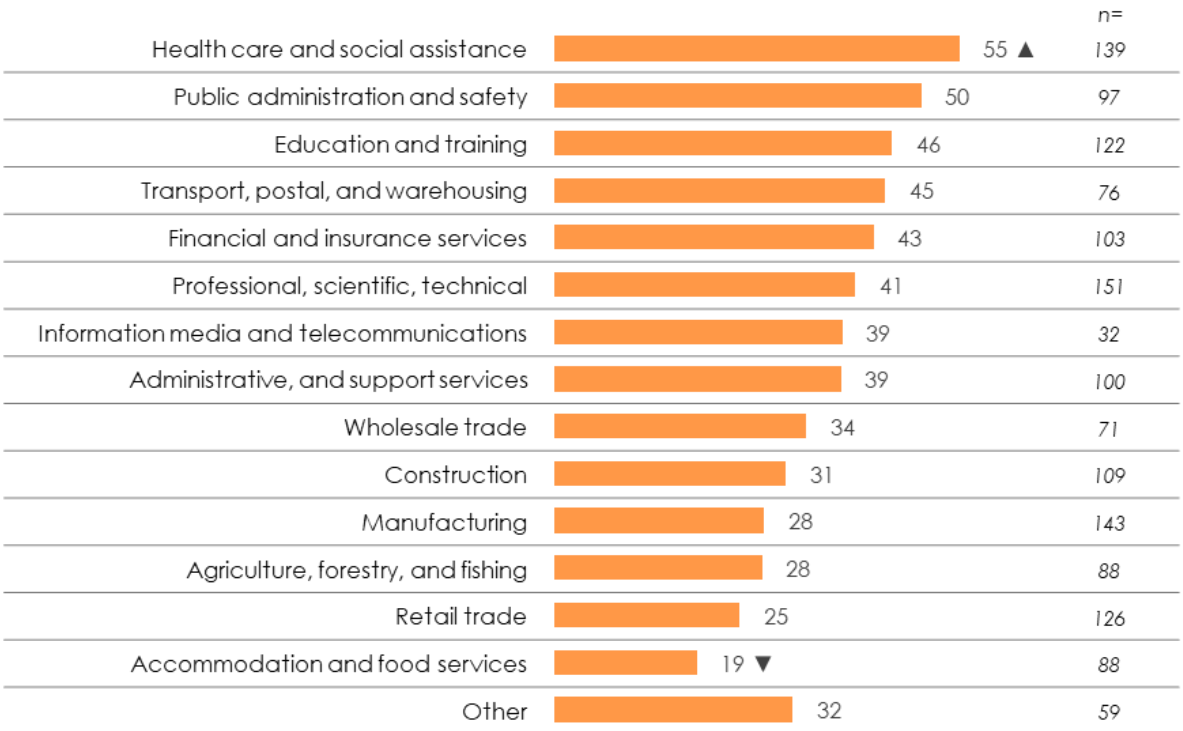
6.4. Employer paid training in last 12 months

More than a third (37%) of workers have participated in employer paid training or study in the last 12 months. This is less common in smaller workplaces (28% of workers in workplaces with less than 20 employees versus 42% in workplaces with 50+ employees), and among low income workers (25% of workers with a personal income under $40,000), and workers without union membership (35% versus 46% of union members). Employer paid training is most common in two sectors with many public sector workers: the education and training sector, and the healthcare and social assistance sector.



Employer paid training in last 12 months by industry

% who have done training courses or study paid by their employer in the last 12 months



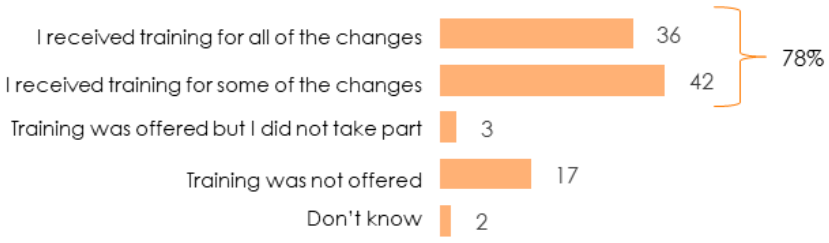
Base: All workers (n=1,504)
▲▼Significantly higher/lower than other industries
Source: Q22b. In the last 12 months, have you done any training courses or study that was paid for by your employer?

6.5. Training for job changes

Workers who have experienced technology, method, or product/service changes in their job largely receive training for at least some of the changes (78%).

Training received for job changes

%

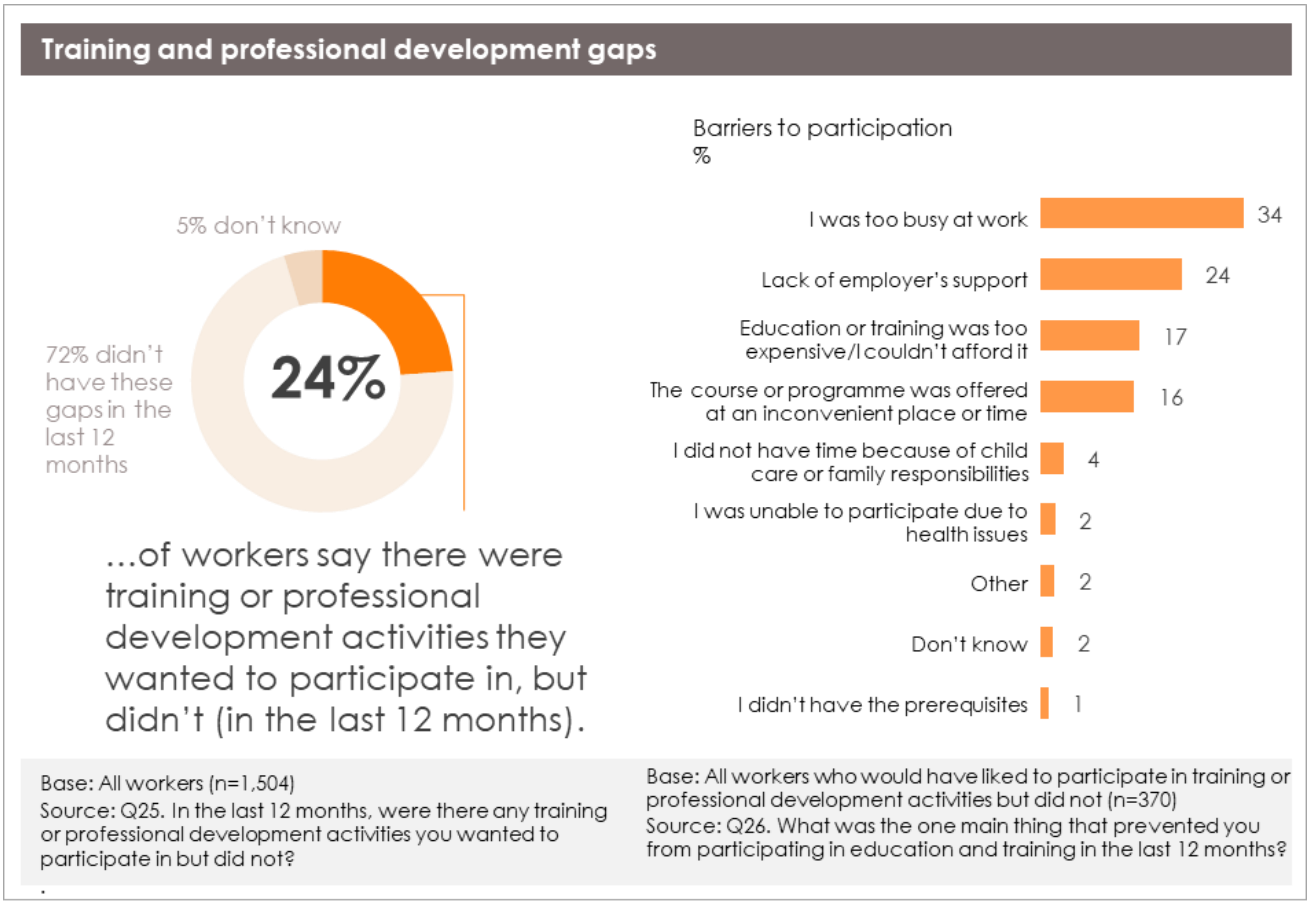


Base: All workers who have experienced changes in the past 5 years in their main job (n=1,067)
Source: Q24. Did your employer provide training for any of the changes you have experienced?

6.6. Barriers to training and professional development

Nearly one quarter (24%) of workers are aware of training or professional development activities that they would like to participate in, but have not in the last 12 months. Barriers most commonly relate to workers' schedules being too demanding to accommodate this training (34%) and lack of employer support (24%). Affordability (17%) and convenience (16%) also play a role.

Training or professional development demand is biggest in education and training (38%), healthcare and social assistance (37%), information media and telecommunications (36%)[2], and professional, scientific and technical services (35%). Interestingly, two of these sectors (education and training, and healthcare and social assistance) also have the highest rates of employer paid training. This may reflect higher worker expectations in these sectors and/or that participating in training whets their appetite for further training.



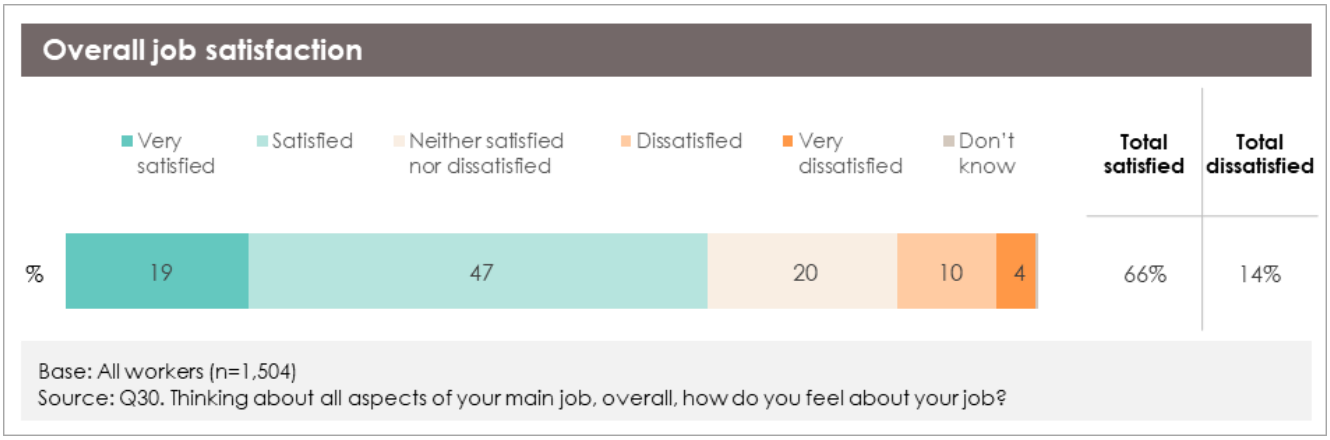
2 Due to the small base size (n=32) this result is not statistically significantly different from the average.

7. Current job quality

This section presents data on job quality: job satisfaction, work related harm and the prevalence and perceptions of working from home. These measures provide a benchmark from which comparisons can be made with future survey waves. This will assist in future monitoring of the impact of technological changes on job quality dimensions. Note, the survey questions covered in 7.1, 7.2, and 7.3 are taken from the Statistics New Zealand Survey of Working Life.

7.1. Overall job satisfaction

Two thirds of workers are satisfied with their job. This question was asked immediately following questions on worker concerns relating to new technologies including how supported the worker feels by their employer to learn how to work with new technologies. It is possible that survey respondents' response to the question on job satisfaction has therefore been influenced by how they feel about these topics raised in the preceding questions. MBIE's comprehensive employment monitor[3] reports a significantly higher level of worker satisfaction (the overall satisfaction is asked towards the beginning of the questionnaire in that survey so is not influenced by other topics).



Further analysis shows that job satisfaction is related to these variables:

- Job security: 53% of workers with at least a moderate chance of losing their job express job satisfaction versus 72% of workers with a low or almost no chance
- Whether the worker has done training courses or study paid by their employer in the last 12 months: 72% of workers who have done this express job satisfaction versus 62% of workers who have not.

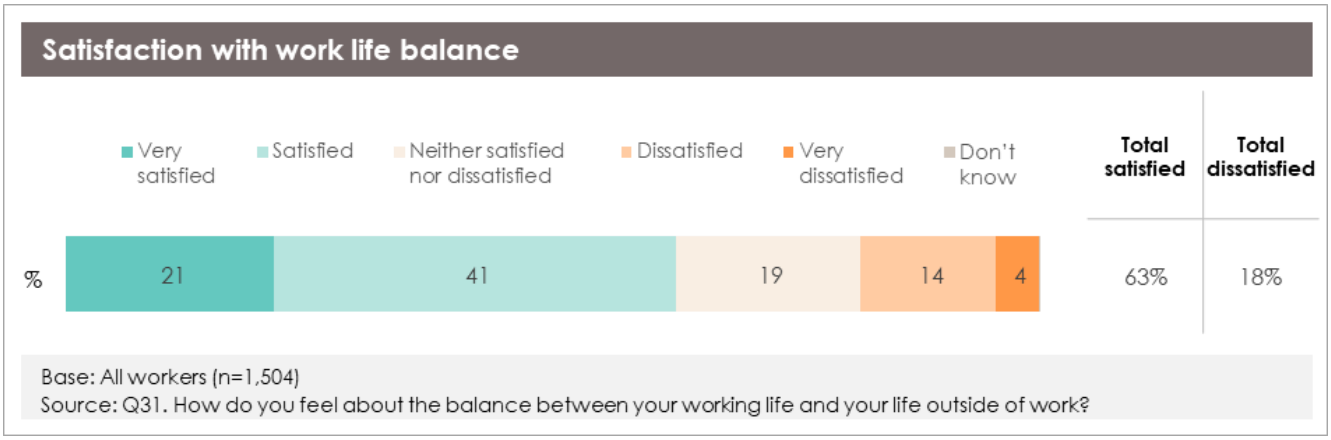
Seven in ten AI users express job satisfaction (70% versus 66% on average). This is not statistically significantly different.

Note this analysis cannot be interpreted to imply causality – there may be other underlying variables driving these differences.

[3] The report can be found at https://www.employment.govt.nz/assets/uploads/documents/employment-new-zealand/employment-monitor-report-2024.pdf

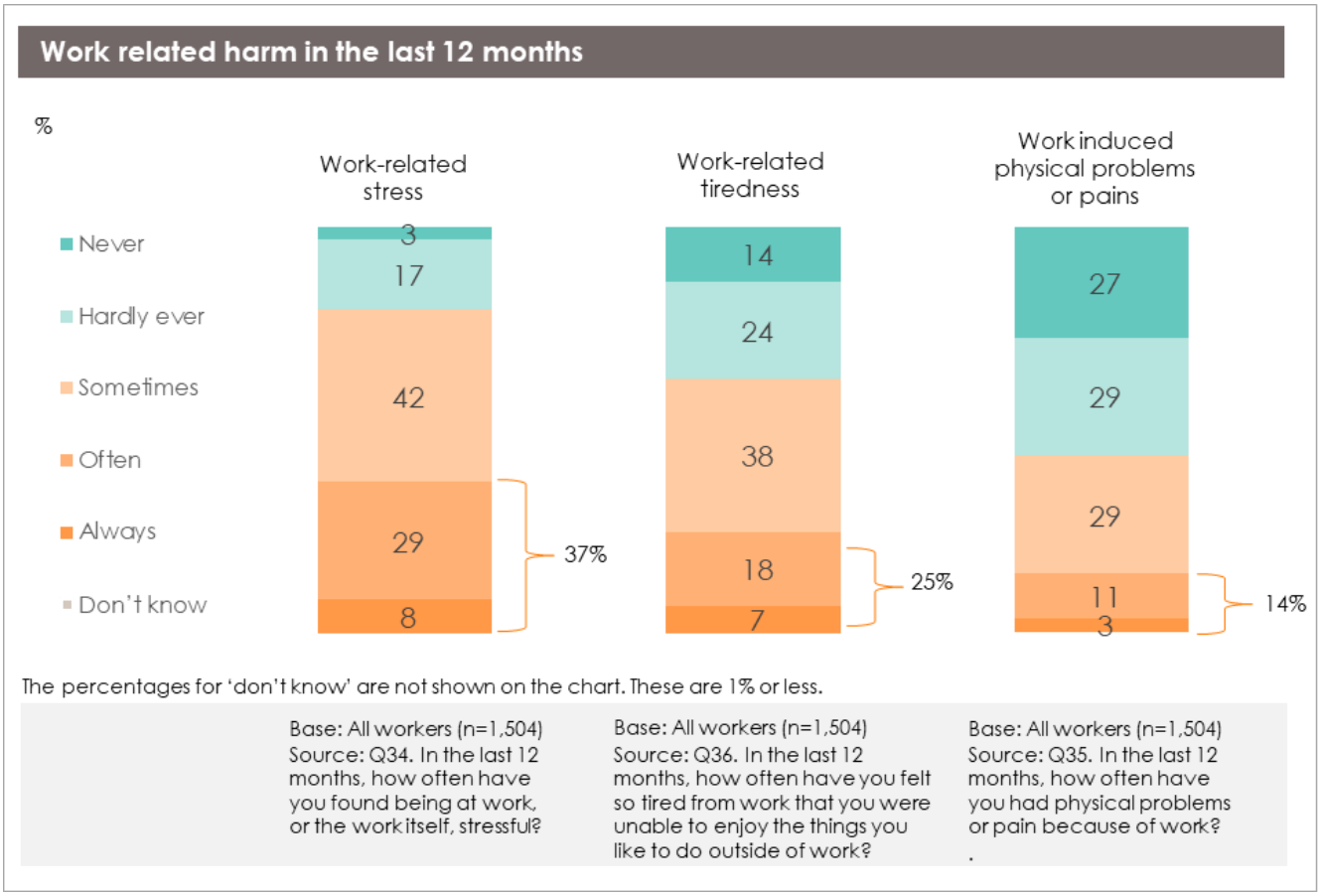
7.2. Satisfaction with work life balance

Just under two thirds (63%) of workers are satisfied with the balance between their working life and their life outside of work.



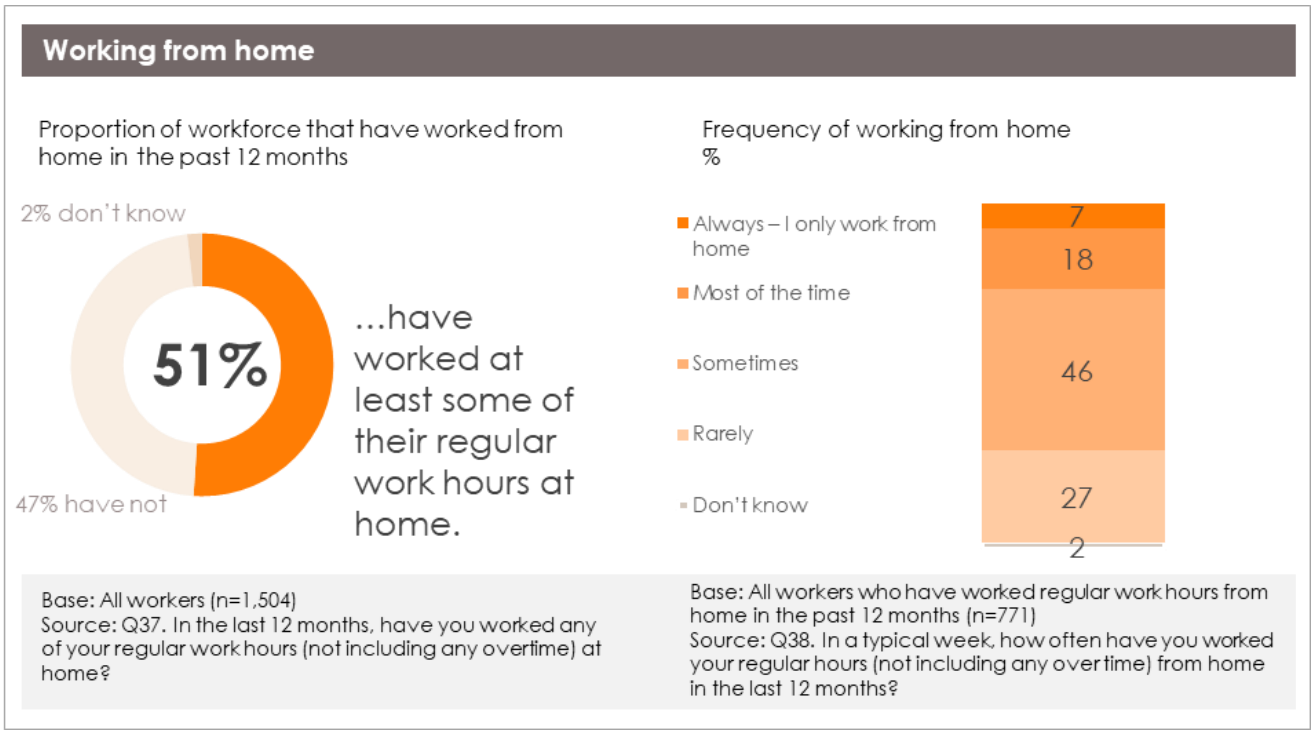
7.3. Work related harm in the last 12 months

Over a third of workers (37%) frequently experience work-related stress, a quarter (25%) frequently experience work-related tiredness, and one in seven (14%) have had work-related physical problems or pain in the last 12 months.



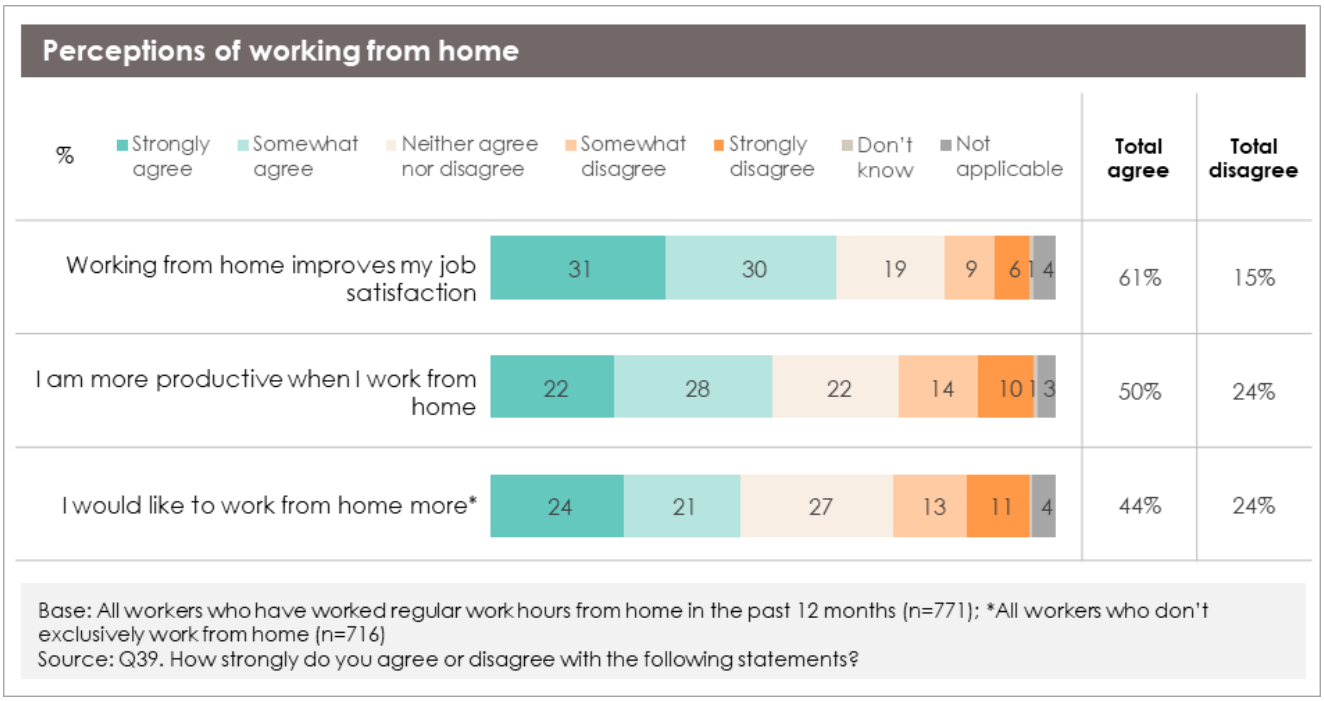
7.4. Working from home

Around half (51%) of workers have worked regular hours from home in the last 12 months. One quarter (25%) of these workers work from home most or all of the time. This equates to 13% of all workers.



7.4.1. Perceptions of working from home

Many workers feel working from home improves their job satisfaction (61%) and productivity (50%). Around four in ten (44%) workers who don't exclusively work from home would like to work from home more regularly.



8. Appendix: Demographic profile

The table below profiles the weighted and unweighted samples on demographic characteristics.

Demographic profile	Unweighted		Weighted	
	n	%	n	%
Employment type				
An employee working for wages or salary	1,486	99%	1,489	99%
Working without pay in a family business	18	1%	15	1%
Age within gender				
Males 18 – 29	185	12%	195	13%
Males 30 – 39	161	11%	164	11%
Males 40 – 49	163	11%	167	11%
Males 50 – 59	157	10%	160	11%
Males 60 plus	119	8%	122	8%
Females 18 – 29	168	11%	164	11%
Females 30 – 39	140	9%	133	9%
Females 40 – 49	158	11%	152	10%
Females 50 – 59	153	10%	148	10%
Females 60 plus	94	6%	93	6%
Ethnicity				
New Zealand European	1,004	67%	1,139	76%
Māori	418	28%	211	14%
Pasifika	142	9%	105	7%
Asian	261	17%	165	11%
Other	137	9%	9%	9%
Personal income (before tax)				
Less than $19,999	55	4%	52	3%
$20,000 – $39,999	116	8%	111	7%
$40,000 – $59,999	234	16%	237	16%
$60,000 – $79,999	350	23%	340	23%
$80,000 – $99,999	296	20%	290	19%
$100,000 – $119,000	181	12%	189	13%
$120,000 – $139,000	90	6%	88	6%
$140,000 +	123	8%	128	8%
Don't know	59	4%	69	5%
Number of paid jobs				
1	1,371	91%	1,384	92%
2	110	7%	100	7%
3	14	1%	12	1%
Other	9	1%	8	1%

Demographic profile	Unweighted		Weighted	
	n	%	n	%
Hours worked per week				
Part-time (up to and including 30 hours)	258	17%	250	17%
Full-time (more than 30 hours)	1,246	83%	1,254	83%
Industry				
Agriculture, forestry, and fishing	88	6%	88	6%
Manufacturing	143	10%	143	10%
Construction	109	7%	109	7%
Wholesale trade	71	5%	71	5%
Retail trade	126	8%	126	8%
Accommodation and food services	88	6%	88	6%
Transport, postal, and warehousing	76	5%	76	5%
Information media and telecommunications	32	2%	28	2%
Financial and insurance services	103	7%	103	7%
Professional, scientific, technical	151	10%	151	10%
Administrative, and support services	100	7%	100	7%
Public administration and safety	97	6%	97	6%
Education and training	122	8%	122	8%
Health care and social assistance	139	9%	139	9%
Other	59	4%	63	4%
Employment status (main job)				
Permanent employee	1,233	82%	1,245	83%
Fixed term employee	171	11%	170	11%
Casual employee	75	5%	70	5%
Contractor	15	1%	12	1%
Don't know	10	1%	7	*
Employer size (number of workers)				
Less than 20 workers	347	23%	366	24%
20 to 49 workers	219	15%	212	14%
50 to 99 workers	145	10%	148	10%
100 to 249 workers	149	10%	139	9%
250+ workers	589	39%	588	39%
Don't know	55	4%	52	3%
Employment length				
Less than 6 months	112	7%	109	7%
6-12 months	148	10%	141	9%
1-2 years	276	18%	283	19%
3-5 years	297	20%	301	20%
5+ years	671	45%	671	45%
Job location (region)				

Demographic profile	Unweighted		Weighted	
	n	%	n	%
Northland	45	3%	60	4%
Auckland	533	35%	496	33%
Waikato	125	8%	135	9%
Bay of Plenty	91	6%	105	7%
Gisborne/Hawkes Bay	30	2%	45	3%
Taranaki	3	*	3	*
Manawatu-Wanganui	43	3%	57	4%
Wellington	87	6%	75	5%
Nelson	165	11%	165	11%
Tasman	8	1%	15	1%
Marlborough	15	1%	15	1%
West Coast	16	1%	15	1%
Canterbury	12	1%	15	1%
Otago	211	14%	196	13%
Southland	75	5%	75	5%
Union membership				
Yes	311	21%	309	21%
No	1,147	76%	1,153	77%
Don't know	46	3%	42	3%
Employment agreement				
Collective agreement	269	18%	268	18%
Individual agreement	1,227	82%	1,226	82%
Don't know	8	1%	10	1%
Total	**1,504**	**100%**	**1,504**	**100%**

Base: All respondents (n=1,504)
Source: S1, S2, S3, S4, QS5, Q1, Q2, Q3, Q5, Q6, Q7, Q8, Q9, Q10.
Note: Due to the small number of respondents in rental, hiring, and real estate services (n=25) and arts, recreation, and other services (n=25) these two sectors have been combined with the 'other' sector category.
* = % between 0.0% and 0.5%

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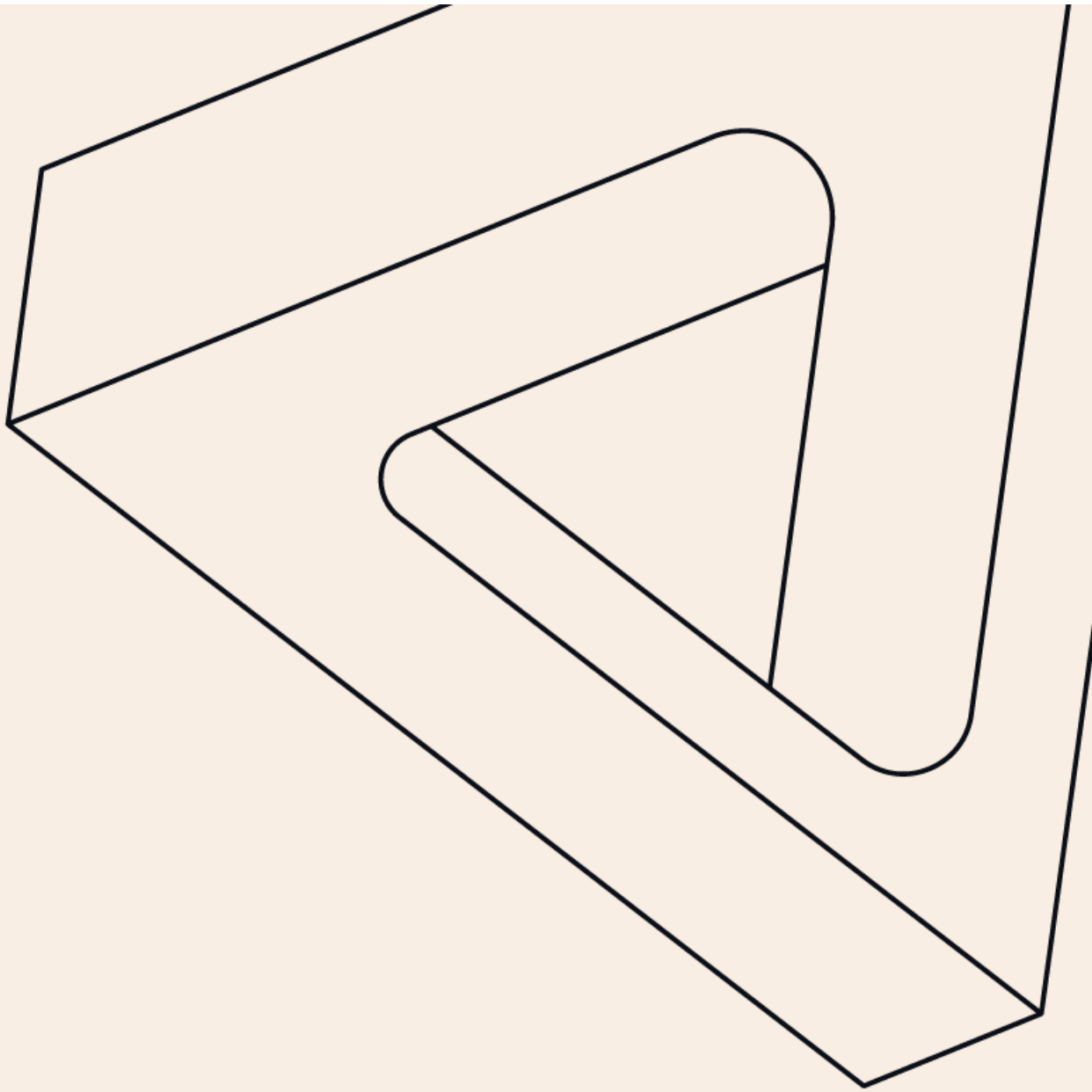
Powering decisions
that shape the world.



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