

Australian Women's Working Futures: Are We Ready?

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Preface

As the ‘Future of Work’ is being discussed around the world, women continue to be the most under-utilised and potentially game-changing factor for fair and prosperous economic growth. Recent research shows that a reduction in the gap in participation rates between men and women by 25 per cent has the potential to increase the GDP in Asia Pacific by as much as US\$ 3.2 trillion. A recent report by the International Labour Organization and Gallup confirmed that the majority of women and men worldwide would prefer that women work in paid jobs and find it perfectly acceptable for women to have paid work outside of the home. Why then does female labour force participation still lag behind that of males in all countries of the region?

To examine the opportunities and challenges of the future at work for women, the International Labour Organization (ILO) and the Australian Government’s Department of Jobs and Small Business have partnered in a project called “Women and the Future of Work in Asia and the Pacific”.

The following paper was part of a competitive ‘call for proposals’ under this project. It will be one contribution into the ILO’s forthcoming ‘Women and the Future of Work in Asia and the Pacific regional report’. These selected papers are meant to provide evidence-based policy recommendations to inform decision-makers on where best to invest efforts and resources to achieve the best returns for the future of work.

We warmly thank the researchers for their contributions to this project. We would also like to extend our deep gratitude to the Technical Advisory Group (TAG) members for their contributions to the project- Edgard Rodriguez, Ratna Sudarshan, Shauna Olney, Helen Lockey, Sara Elder, Rebecca Duncan, Kristin Letts, Rhea Kuruvilla. We thank them all for their guidance for the call for proposals as well as their technical inputs to the selected papers. ILO technical Coordination and inputs have been led by Joni Simpson and Aya Matsuura. Thanks to Noorie Safa for pulling the reports together and to Shristee Lamsal for her overall coordination of the Women and the Future of Work in Asia and the Pacific Regional Conference

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Abstract

Australian governments have made gender equality in the workplace a priority, citing women's enhanced engagement in the workforce as essential to raising living standards and securing Australia's future prosperity (Commonwealth of Australia 2017). But Australian women and men do not participate in the labour market as equals, and employment and economic outcomes remain unequal and highly gendered. What will it take for gender equality to be part of the future of work in Australia? In this paper we report on the Australian Women's Working Futures Project (AWWF) 2017. This new and unique study by an interdisciplinary team at The University of Sydney focuses on the experiences, values and aspirations of young working women aged 16-40 years. Young women are the core of the future workforce, but rarely the subject of research.

The AWWF Project 2017 shows that young women value job security, predictable and regular hours, decent pay, and the opportunity for respect, control, and influence in the workplace. Access to the right skills and qualifications, support and mentoring, and paid leave to care for family are all cited as important to women's future success at work. Young women are job-orientated and want to advance their careers. They actively plan for the future and intend to have children. But most women do not think they are treated the same as men at work and only half think gender equality at work will improve in the future. The AWWF Project 2017 shows many Australian workplaces are not providing young women with what they value or need to succeed in the workplace, and public policy settings are not ready to meet young women's aspirations for the future of work. Government and business must urgently redouble efforts to promote legislative and policy initiatives that will deliver Australian working women gender equality in the future of work. The paper concludes with a number of policy recommendations.

Keywords: Future of work; Australia; women.

Executive Summary

Background

Recent Australian governments have made gender equality in the workplace a priority, citing women's enhanced engagement in the workforce essential to raising living standards and securing Australia's future prosperity (Commonwealth of Australia 2017). But Australian women and men do not participate in the labour market as equals. Employment and economic outcomes remain unequal and highly gendered with stark differences between women and men's rates of participation, pay, hours of work, contribution to unpaid labour in the home, and patterns of occupational and industrial segregation. What does this mean for the future of work?

This paper reports the findings of the Australian Women's Working Futures Project 2017. This new study by an interdisciplinary research team at The University of Sydney, focuses on young women and what they value and think is important for future success at work. Young women are the core of the future workforce, but rarely the subject of research. This study provides a unique evidence-base for policy makers to consider what young women value in work, how they envisage their future, and what gaps need to be addressed to deliver gender equality in the future of work.

Methodology

The AWWF Project 2017 is a combined quantitative and qualitative study of young Australian working women, aged 16-40 years. The quantitative study includes a nationally representative online sample of 2,109 working women aged 16-40, a smaller comparative sample of 502 working men aged 16-40, and a booster of 53 Aboriginal and Torres Strait Islanders working women aged 16-40. The online quantitative survey findings are supplemented by data from five focus groups, each with 8 working women 18-40 years (see Appendix B for more detail). The online survey and focus groups explored a variety of themes across women's experience of working life. Respondents were asked about their expectations of the future of work, what they value, about their career and work plans, their current experience of equality and inequality in the workplace, and how they expect this to change.

Key Findings

The AWWF Project 2017 shows that young women are job-orientated and generally optimistic about the future of work. They value respect in the workplace, job security, flexibility, predictable hours, a measure of control and influence in the workplace, and making a contribution to others. They aspire to having a job that pays well and in which they are able to be promoted. In order to succeed at work and progress in their careers young women report they require the right skills and qualifications, workplace flexibility, paid leave to care for family, support and mentoring in the workplace and a partner who shares childcare and domestic work. When these needs are met, young women are able to work the hours they desire.

Specific findings include:-

- Young Australian working women report that the things that ‘matter most’ in a job are, respect in the workplace (80 per cent), job security (80 per cent), decent pay (65 per cent), an interesting job (64 per cent) flexibility (62 per cent), predictable and regular hours (56 per cent), and a measure of control and influence over their daily work (52 per cent).
- Women report that the things that are important for success in the workplace are: having the right skills and qualifications (92 per cent); access to flexible working arrangements (90 per cent); paid leave to have and care for family (84 per cent); support and mentoring to develop leadership skills (84 per cent); and a partner who shares responsibility for childcare and household domestic work (81 per cent).
- Women in their twenties, and women with children, are most focused on the need to supplement their educational qualifications and improve their skill set. But only 40 per cent of women workers reported they are able to access affordable training.
- Sixty per cent of women have a strong desire to advance their career. But only 43 per cent feel they have the opportunity to move into a more senior position in their current workplace.
- To succeed at work 84 per cent of women say that having access to paid leave to have and care for family is important (compared with 75 per cent of men), and 90 per cent say flexibility is important to future success (compared with 86 per cent of men). And yet only 59 per cent of women agree that they are currently able to strike a balance between work and family responsibilities (compared with 56 per cent of men).
- Women are not particularly alarmed by technological innovation and industrial restructuring: A majority (69 per cent) reported they are not concerned about the possibility of losing their job to a machine or computer, with only around a quarter (28 per cent) saying they are concerned.
- Only 31 per cent of young women think women and men are treated equally at work, compared with 50 per cent of men. More than half (52 per cent) of women think men are treated better than women in the workplace. Only around half (53 per cent) of women think gender equality in the workplace will improve in the next 10 years. 38 per cent expect gender equality in the workplace to stay the same or get worse.

Conclusion and Recommendations

Young women workers are generally optimistic about work and ready to contribute. However most Australian workplaces are not yet ready to meet young women’s aspirations or support their future success at work. Public policy settings, while improving, remain inadequate. The mismatch between what young women value in work, their aspirations and their current experience as reported in the AWWF Project 2017 provides a clear call to government and business to step up and take action for change.

The findings of the AWWF Project 2017 highlight the following recommendations:

1. Implement recommendations from past government inquiries into gender equality at work:

Australian governments, policymakers and researchers have developed a large and comprehensive body of knowledge about gender inequality in the Australian labour market and its impact on women's socio-economic security. The recommendations made by numerous government inquiries provide a clear pathway towards achieving greater gender equality in the future of work and would contribute to addressing many of the gaps identified in the AWWF Project 2017. Determined political commitment to implementing these recommendations is urgently required.

2. Promote Pay Equity:

In response to problems identified by young working women with low pay, labour market segmentation and job insecurity the AWWF Project 2017 strongly endorses the recent recommendations on pay equity made in The Senate Finance and Public Administration References Committee report on Gender segregation in the workplace, 2017. In particular, Recommendation 1: That the Office for Women in the Department of the Prime Minister and Cabinet lead the development and implementation of a national policy framework to achieve gender pay equity in Australia; and Recommendation 2: That the Fair Work Act 2009 be amended to improve its capacity to address equal remuneration, including, introducing gender pay equity as an overall object of the Act; and the provision of guidance for both the Commission and applicant parties on making and applying for orders of equal remuneration (The Parliament of the Commonwealth of Australia, 2017: 58-60).

3. Extend and improve policies to recognise, reduce and redistribute family and community care responsibilities:

AWWF Project 2017 findings are unequivocal about the positive role that flexibility in the workplace plays in securing women's future success in the workplace. Gender-neutral workplace flexibility measures are essential to supporting a more equitable division of labour in the home and workplace. This will include equal access for men and women to paid parental leave, flexible work options and other industry specific measures.

Robust legislative provisions are required, including amendments to the Sex Discrimination Act 1984 (SDA) to: extend the discrimination ground of 'family responsibilities' under the SDA to include indirect discrimination; and include a positive duty on employers to reasonably accommodate the needs of workers who are pregnant and/or have family responsibilities (Australian Human Rights Commission, 2014: 12).

Ongoing government and private sector financial commitment to delivering a 'joined-up' system of paid parental leave and improved access to affordable and high quality early childhood education and care services, including out of school hours care, will support gender equality in the future of work. Extending the 18 weeks of Parental Leave Pay (PLP) currently provided by the Commonwealth

government program, raising the payment rate from the minimum wage, providing for a longer period of Dad and Partner Pay (DaPP) on a 'use or lose' basis, and providing for payment of the superannuation guarantee during PPL will support women's attachment to the workforce, improve women's economic security and encourage a more equitable sharing of care responsibilities between parents.¹

4. Ensure the conditions of decent work, especially in highly feminised sectors:

The AWWF Project 2017 data shows that many young women are in jobs that do not have all the characteristics of 'decent work' (ILO1999). Projected growth in feminised low-paid jobs in health care and social assistance suggest an urgent need for government action and resourcing to ensure these jobs meet the criteria of decent work and that the principle of 'equal pay for work of equal value' is able to be applied. Other gaps in young women's workplace experience point to the need for a strong commitment by government and business to delivering the conditions of decent work and meeting the targets of Goal 8 of the Sustainable Development Goals 2030.

5. Be attentive to young women workers:

The focus of the AWWF Project 2017 is young Australian women. These women are the future workforce. If the future of work is to be gender equal, then the optimism of young women must be nurtured. Very young women, aged 16-20, stand out as a particularly positive force for a more equal future at work. The voices of young women must be included in the formation of policy that impacts their future at work.

6. Undertake further research on gendered attitudes to technological change:

The results of the AWWF Project 2017 show clear differences between women's and men's expectations about the impact of technological change on their jobs. More gender sensitive and specific research is urgently needed to understand the way in which gender contributes to these differences and to the effects of technological change on labour market segmentation.

¹ See *Work, Care and Family Policies, Election Benchmarks 2016* (W+FPR 2016:6-8).

1. Background

Recent Australian governments have made gender equality in the workplace a priority, citing women's enhanced engagement in the workforce essential to raising living standards and securing Australia's future prosperity (Commonwealth of Australia 2017). But Australian women and men do not participate in the labour market as equals. In spite of women's increased participation in paid employment since the 1980s, a gap remains with a current participation rate for women of 60.2% compared with 70.9% for men (ABS 2017a).² In 2014 Australia used its Presidency of the G20 to secure an agreement by member countries to reduce the gender participation gap in paid employment by 25 per cent by 2025. For Australia, this means decreasing the participation gap by three percentage points (Commonwealth of Australia 2017).

Employment and economic outcomes remain highly gendered in Australia with stark differences between women's and men's rates of pay, hours of work, contribution to unpaid labour in the home, and patterns of occupational and industrial segregation. Women typically earn less than men. The current full-time average weekly ordinary time earnings (AWOTE) gap in Australia is 15.3 per cent, with women earning on average \$251.20 per week less than men (WGEA 2017).³ Women typically work less hours than men, and often part-time: 45 per cent of employed women work part time compared to 16 per cent of employed men (ABS 2017b). Women continue to perform the majority of unpaid labour in the home despite their increasing participation in paid work. The division of total labour in Australia is highly gendered with men, on average, spending twice as long as women in paid work and women twice as long as men doing unpaid work such as domestic activities and child care (ABS 2017b). Women's weaker attachment to the labour market is reflected in lower earnings and, in turn, lower levels of superannuation at retirement, exposing women to a higher risk of economic insecurity and poverty, particularly in old age (ACOSS 2016; Feldman and Radermacher 2016). Women and men also work in different jobs, tending to cluster around specific and highly gendered occupations and industry sectors. Australian government data report that around 61 per cent of Australian employees work in an industry dominated by one gender or the other (WGEA 2016). This seems set to continue, with growth in highly feminised jobs in the health care and social assistance sector projected to account for more than a quarter of all new jobs between 2017-2022 (Department of Employment 2017).

Scholarly literature and public debate on the future of work, both within Australia and across the Asia-Pacific, typically revolve around the impact of technology on work and potential for job loss, changes

² Seasonally adjusted rates, November 2017, for men and women aged 15 years and above – see [http://www.ausstats.abs.gov.au/ausstats/meisubs.nsf/0/5FB47C33F9DC3534CA2581F5007A25FA/\\$File/62020_nov%202017.pdf](http://www.ausstats.abs.gov.au/ausstats/meisubs.nsf/0/5FB47C33F9DC3534CA2581F5007A25FA/$File/62020_nov%202017.pdf). Participation rates for 15-64 years olds are higher at 72.9% for women and 82.9% for men. The employment to population ratio for 15-64 years olds for men is 78.4% and for women is 68.8% (ABS 2017). Labour Force, Australia, Nov 2017, Cat. No. 6202.0, Table 18. Labour force status for 15-64 year olds by Sex.

³ The gender pay gap based on AWOTE is widely agreed as the 'best case scenario' for gender gaps in pay in Australia. Variations in gender pay gaps occur between industries, the public/private sector, occupations and management levels.

in workplace design, new concepts of organisation and leadership, and the reorientation of individuals in relation to their working lives. There is very little analysis of the gendered implications of work and labour market change. The assumption that the future of work will not be a gendered process and have gendered implications is at odds with the present. But there has been scandalously little attention given to the ways in which women, particularly younger women, are approaching their future working lives, what they want from their future at work, or the opportunities and limitations they foresee around access, training and promotion in decent work.⁴

The 2017 ILO-Gallup Poll reported that almost all Australian men and women supported women working outside the home (Gallup-ILO2017), yet this attitude has not translated into gender equality in the workplace. The workplace experience and aspirations of young Australian women in the AWWF Project 2017 study provides a unique evidence-base upon which we can evaluate the efficacy of current policy settings to support the translation of the general views identified in the Gallup-ILO Poll into gender equality for Australian women in the future world of work.

2. Methodology

This paper reports some of the findings from the Australian Working Women's Futures (AWWF) Project 2017 run by an interdisciplinary team from the University of Sydney. The AWWF Project 2017 is a combined quantitative and qualitative study of young Australian working women, aged 16-40 years (See Appendix A). The quantitative study includes a nationally representative online sample of 2,109 working women aged 16-40, a smaller comparative sample of 502 working men aged 16-40, and a booster of 53 Aboriginal and Torres Strait Islander working women aged 16-40. The online quantitative survey findings are supplemented by data from five focus groups, each with eight working women aged 18-40 years (see Appendix B for more detail).

The online survey and focus groups explored a variety of themes across women's experience of working life. Women were asked about their expectations of the future of work, what they value, about their career and work plans, their experience of equality and inequality in the workplace and how they expect this to change. Women were also asked about wages and hours of work, access to flexibility, skills, training and development, job security, and the role of technology in the workplace. We questioned young women about their ability to manage and to balance work and care commitments, and asked them to tell us how they felt that they were valued in their workplace and the extent to which they felt able to exert influence over decision making the workplace. The results of the quantitative and qualitative research have delivered a rich body of data about what women experience in the

⁴The International Labour Organization (ILO) first formally elaborated its Decent Work Agenda (DWA) in 1999. Decent work is defined by the ILO as involving: '... opportunities for work that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organize and participate in the decisions that affect their lives and equality of opportunity and treatment for all women and men (ILO 1999).

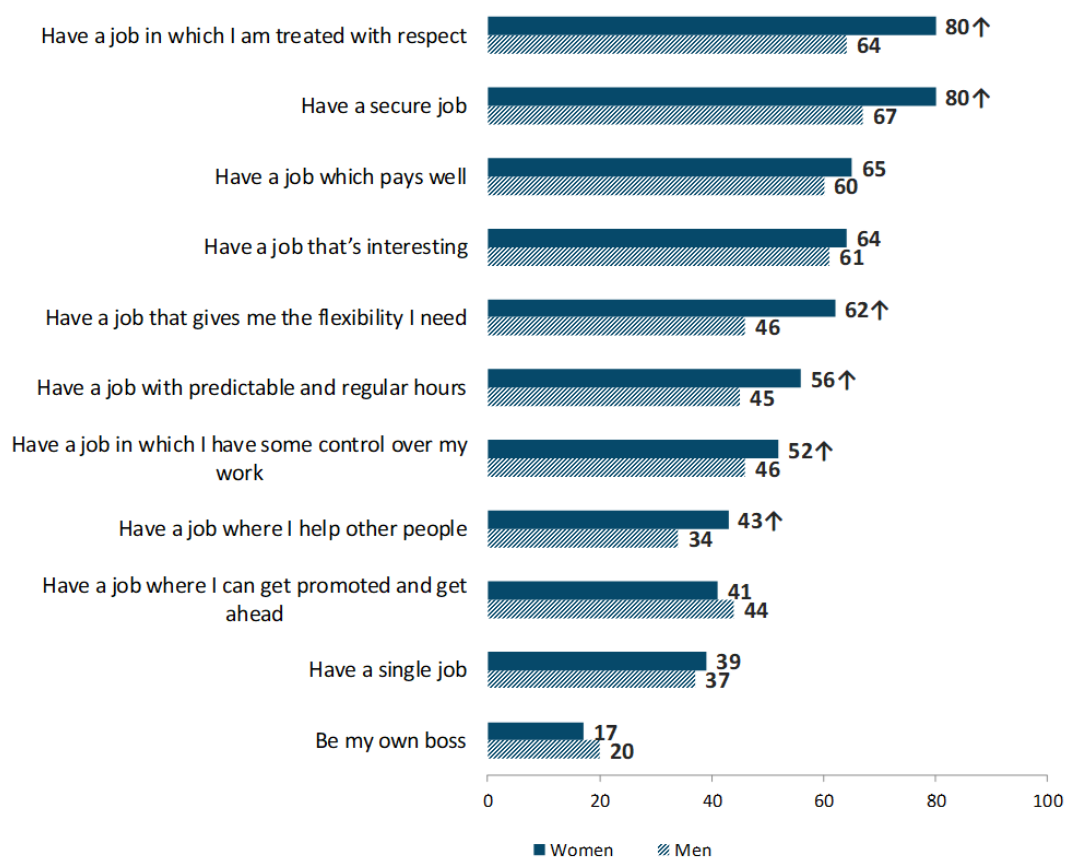
workplace, what they value in work, what they need for a successful future at work, and their expectations about equality at work in the future.⁵

3. Key Findings

3.1 What women value at work:

Women report that the things that ‘matter most’ in a job are being treated with respect (80%), having job security (80%), being paid well (65%), having a job that is interesting (64%) offers the flexibility they need (62%), and in which there are predictable hours (56%), and are able to exercise a measure of control and influence in the workplace (52%).

Figure 1: What matters in a job? ⁶



This data is in response to the question: Below are a range of issues that can be important in a job. For each of these, do they matter a lot to you, a little, or do they not matter at all? (Base: All women

⁵ This paper reports high level aggregate findings from the AWWF Project 2017 survey. More detailed analysis on differences between the experiences and expectations of Aboriginal and Torres Strait Islander, Culturally and Linguistically Diverse (CALD) and disabled women, union/non-union members, and women employed in different industry and occupational groupings will be provided in a number of forthcoming papers. Additional analysis will also be undertaken on gender differences in experience and expectations on the future of work.

⁶ Statistically significant differences between subgroups of respondents are indicated on the chart using an arrow.

*under 40, n=2,109 and all men under 40, n=502) *Note that the chart above only lists data for the response: 'matters a lot'.*

But what women value changes over time with women in their thirties strongly valuing a job that is interesting, has predictable hours, control, and flexibility, more than women aged 16-29 years. Conversely, women in their thirties are less likely to say that having a job where they can be promoted and get ahead matters a lot (37%; in comparison to around 44% of those aged 16-29).

Women value being treated with respect in the workplace

Eighty per cent of young women say that having a job in which they are treated with respect 'matters a lot'. However, young women's aspirations for respect in the workplace are often not met. Only two-thirds (68%) report they are treated with respect by their current manager, and around half say they receive adequate recognition (48%) and feel valued at work (56%). Less than half of young women say they can influence decisions in their workplace (46%) or that their manager asks for their input on important workplace issues (48%).

Women who had completed tertiary education were most likely to agree that their manager treats them with respect (71%) compared with those who had TAFE or school qualifications (65%). Women with tertiary education (50%) and high income earners (55%) were most likely to have input on important workplace issues (compared to 44% of those with a TAFE qualification, 40% of those who have completed secondary school only and 42% of those earning below \$40,000). More than a quarter of women (27%) say they do not have the ability to influence decisions in their workplace. Women who work predominantly on a casual or freelance basis (33%) and women who work multiple jobs (35%), for example are most likely to report being unable to influence decisions in their workplace.

Feeling valued in the workplace, able to influence decisions making processes and being able to provide input on important work issues are all aspects of 'respect' that reflect on the social relations of work - that is issues of power, control and relationships.. Focus group data shows that women view 'respect' and especially 'disrespect' through a gendered lens, reporting they often feel 'disrespected' by senior colleagues and supervisors because of their gender and appearance. This was the case for highly paid professionals and low- paid workers.

Women value job security and predictable hours

Eighty per cent of young women say having a secure job 'matters a lot' and is a key motivator for choice of employment sector and nature of role. However, only 59% say they are secure in their current job. This is less than what might be expected given that only 19% of women in the survey reported working in casual or short-term contract work. Women who are least likely to feel their job is secure are those working multiple jobs (51%; compared with 61% of women with one job); and working casually, freelance or short-term contracts (39%; compared to 66% of those working for an employer, and 56% of those working for their own business). Women employed in the public sector were most likely to feel secure (66%; compared with 57% of those in the private sector and 54% in the non-profit sector).

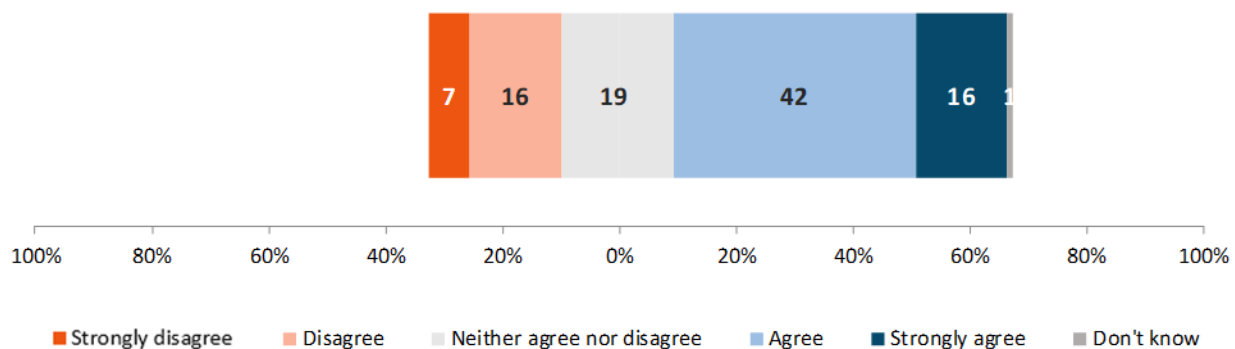
Having a role with predictable and regular hours is a priority for nine in ten working women, and is particularly important for women managing caring responsibilities. Fifty-six per cent of women say a job with regular and predictable hours ‘matter a lot’. The lack of predictability can be an attraction for some in casual or freelance roles, but is mostly reported to be a deterrent as it negatively impacts on both employees’ social and personal life.

Women value a job that pays well and enables them to pay their bills

Sixty-five per cent of young women say having a job which pays well ‘matters a lot’. But many young women report difficulties paying their bills (See Figure 2). Only a little more than half of women who are currently working (58%) report they are earning enough to pay their bills and almost a quarter (23%) report they are not. Women working in a single job were more likely to agree that they earned enough to pay their bills (60%; compared to 50% of those in multiple jobs).

Financial stress for women in the focus groups focused on the challenges of buying a property (both saving a deposit and paying a mortgage), establishing themselves to be able to afford children and making sufficient contributions to their superannuation. A relatively high proportion of women in the survey (68%) said they are concerned that they will not have sufficient retirement income to retire comfortably. Even so, three quarters (73%) expected to be retired by the age of 70. These findings reflect women’s concentration in low-paid feminised employment and other gender dynamics of the Australian labour market that underwrite the gender pay gap and women’s economic insecurity.

Figure 2: Earning enough to pay the bills?



This data is in response to the question: Below are some statements about jobs and workplaces. For each, please think about your main job. Do you agree or disagree that - I earn enough to pay my bills (Base: All women under 40 who are currently working, n=1,692)

Women value job flexibility

Sixty-two per cent of young working women say that it ‘matters a lot’ to have a job that gives them the flexibility they need. The groups of women most likely to say that flexibility matters a lot are: women in their 30s (67%; compared to 57% of those in their 20s) and women with children (70%; compared to 57% of those without children).

But only six in ten young working women agree they currently have access to necessary flexibility within the workplace. Some women report there is a wide gap between company policies regarding flexible working and the cultural reality of what is actually supported within the workplace. Those most likely to strongly agree that they have access to the flexibility they need are women who are self-employed (28%; compared to 14% of those who work for an employer); and women who regularly work from home (29%; in comparison to 13% of those who never do).

Children and care

To succeed at work 84% of women say that having access to paid leave to have and care for family is important (compared with 75% of men), and 90% say flexibility is important to future success (compared with 86% of men). And yet only 59% of women agree that they are currently able to strike a balance between work and family responsibilities (compared with 56% of men).

Four in ten women had at least one child, and half (54%) expect to have a child in the future. Around three-quarters (78%) say that accessing care for dependents is important for them to be able to succeed at work, as is having a partner who shares both childcare and domestic work (81%). Women planning a family were very conscious of needing to establish themselves in a role that would accommodate flexible working and part-time work prior to becoming pregnant.

3.2 Workforce skills and training for the future:

The majority of working women report that developing the right skills and qualifications is important for success at work (92%) alongside support and mentoring to develop leadership skills (83%). Just half of the women surveyed (51%) believe they have the necessary education and training to remain in a good job and 29% think they need more education or training (see figure 3).

Figure 3: Having the education and training required for a ‘good job’



*This data is in response to the question: How do you feel about your work over the next 5-10 years...?
(Base: All women under 40, n=2,109)*

Young women in their twenties were particularly conscious that to progress beyond low-skilled roles they need to supplement their educational qualifications and improve their skill set. Working mothers also highlighted the need to remain in the workforce, often as part-time workers, during their early years as parents in order to keep their skills current until they can take on a role with more hours, or greater responsibility.

Despite recognition of the need to develop and maintain a relevant, current skill set, only 40% of women workers reported they are able to access affordable training. Those most likely to agree that they can access affordable training to equip them for future roles are: those working in the public sector (49%; in comparison to 39% of those in the private sector); those who work from home (47%; while 35% of those who never do say the same); women with a tertiary education (45% of those with a Bachelor's degree and higher; in contrast to 36% of those with a TAFE diploma or certificate). On the other hand, women working on a casual or freelance basis are more likely to disagree that they can access this training (36%; compared to 27% of those working full-time or part-time for an employer).

The data shows a mismatch between young women's current skills, education and employment experience, and what they think they will need in the future. Only three-quarters (76%) feel their current role allows them to use their skills, knowledge and abilities. The lowest responses came from: younger women aged 16-20 (62%; compared to 82% of those women aged 31-40); those who are working on a casual or freelance basis (65%; in comparison to 87% of those who are self-employed and 78% of those working for an employer); and, low income earners (69% of those earning below \$40,000; in comparison to 83% of those earning above \$80,000).

Technology and the future of work

Young women are not alarmed by technological innovation and industrial restructuring across the economy. Women in the focus groups demonstrated a high level of awareness of the impact of changing technology and automation in the workplace and some have already seen job losses as a consequence. However the majority of women (69%) report they are not too concerned about the possibility of losing their job to a machine or computer, with only around a quarter (28%) saying they are concerned. This may reflect the type of work women do and a sense that their roles cannot be as easily be replaced by technology, as nearly two-thirds of women work in industries that rely on personal interactions: retail (17%), health care (15%), education (13%) and accommodation and services (11%).

Women's perceptions about the impact of automation and economic restructuring on their individual job security differed markedly with those of men. When asked about a number of factors that could lead to job loss, women reported much lower levels of concern than men. Women were less concerned about being displaced by someone willing to do their job for less money (33% very or somewhat concerned compared with 44% of men); less concerned they would be unable to keep up with the technical skills required to do their job (19% very or somewhat concerned compared with 33% of men); less concerned that machines or computer programs will displace them (28% very or somewhat concerned compared with 38% of men); and less concerned their industry is shrinking (27% very or

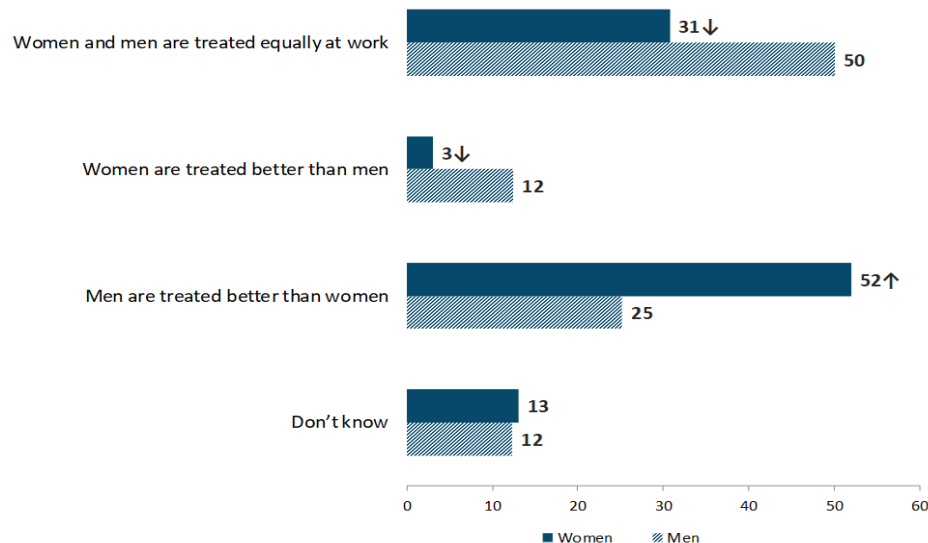
somewhat concerned compared with 40% for men). Again, this may be a reflection of gender segmentation and pay inequity in the labour market, but the results clearly suggest the need for more research on gendered attitudes to technology and the future of work. They point to the gap that currently exists in current knowledge and which our research is assisting to close.

3.3 Equality in the workplace:

Perceptions of gender equality in the workforce

When asked about their perception of gender equality in the Australian workforce less than one third (31%) of women think that men and women are treated equally, compared with 50% of men. Fifty-two per cent of women think men are treated better in the workplace than women (see figure 4). But when asked about their own workplace women are more positive: 61% of women report there is gender equality in their own workplace. Fifty-eight per cent of women also report that in their own workplace women and men have equal opportunity for promotion and 55% think there is equal opportunity for leadership roles. This still leaves around one fifth of women (18%) who do not think there is gender equality in their own workplace. Sixty per cent of women have a strong desire to advance their career. But only 43% feel they have the opportunity to move into a more senior position in the current workplace. Higher skilled women in particular, were quick to identify the senior tier of their firms as being predominantly male, and that their organisations are structurally difficult for women to climb.

Figure 4: Perceptions on women's current experience in the workforce, by gender⁷



This data is in response to the question: Thinking about Australian women's current experience in the workforce, do you think? (Base: All women under 40, n=2,109 and all men under 40, n=502)

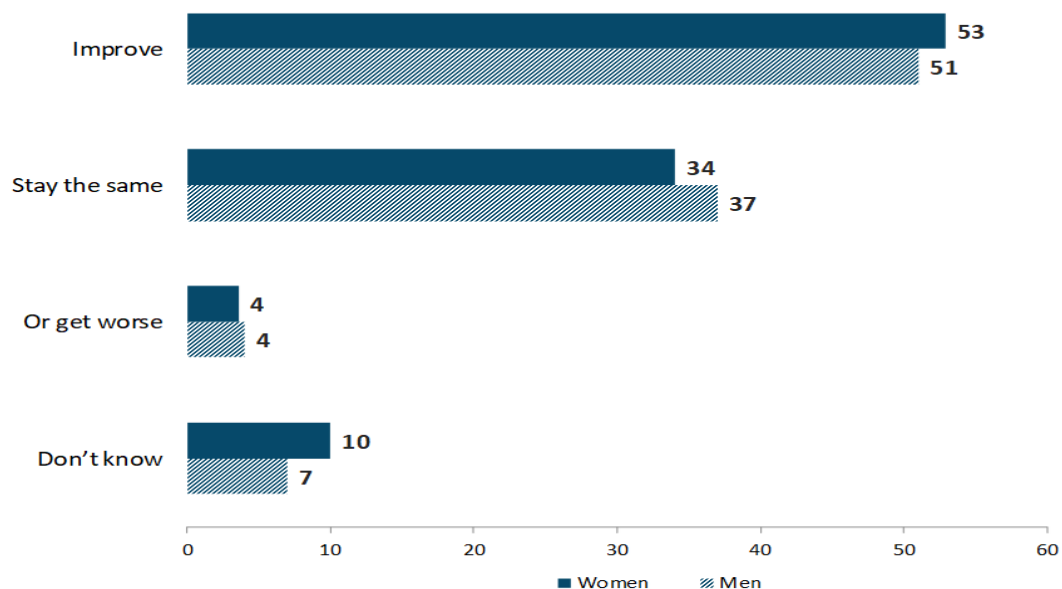
⁷ Statistically significant differences between subgroups of respondents are indicated on the chart using an arrow.

One in ten working women (10%) have experienced sexual harassment in the workplace. The qualitative research highlighted that this ranged from verbal harassment to structural barriers to progression and restricted access to training for part-time workers, or parents. The groups of women most likely to agree that they experience sexual harassment at work were young women who are currently studying and women affected by a disability (15%; compared with 8% of those who are not studying and 18%; in comparison to 9% of those without a disability). Women born in Asia and culturally and linguistically diverse (CALD) women are twice as likely as others to say they experience sexual harassment (19% of women born in Asia, compared with 9% of those born in Australia, for instance, and 16% of CALD women, compared to 8% of those who are not CALD). Those women who had experienced sexual harassment, discussed the difficulties of raising the problem, and were all concerned that in doing so it would limit their progression and that their employer would not sanction the perpetrator in any meaningful way

Gender equality in the future

Despite women and men having significantly different opinions on gender equality in the workplace at present, both women and men have similarly low expectations on the prospect for change over the next ten years. Only half of women (53%) expect gender equality will improve over the next decade, while a third (34%) think it will stay the same (see Figure 5). These results varied according to a woman's age with very young women more likely to say that gender equality will improve over the next decade (63% of those aged 16-20 say this; compared to 46% of those aged 31-40). Those aged 16-20 are also less likely to think that women's experiences will remain the same (25%; compared with 41% of those 31-40).

Figure 5: Perceptions on the future of Australian working women's experiences, by gender



This data is in response to the question: Thinking about gender equality in the workforce over the next 10 years, do you think Australian women's experience will ...? (Base: All women under 40, n=2,109 and all men under 40, n=502)

Perceptions on cultural discrimination in the Australian workforce

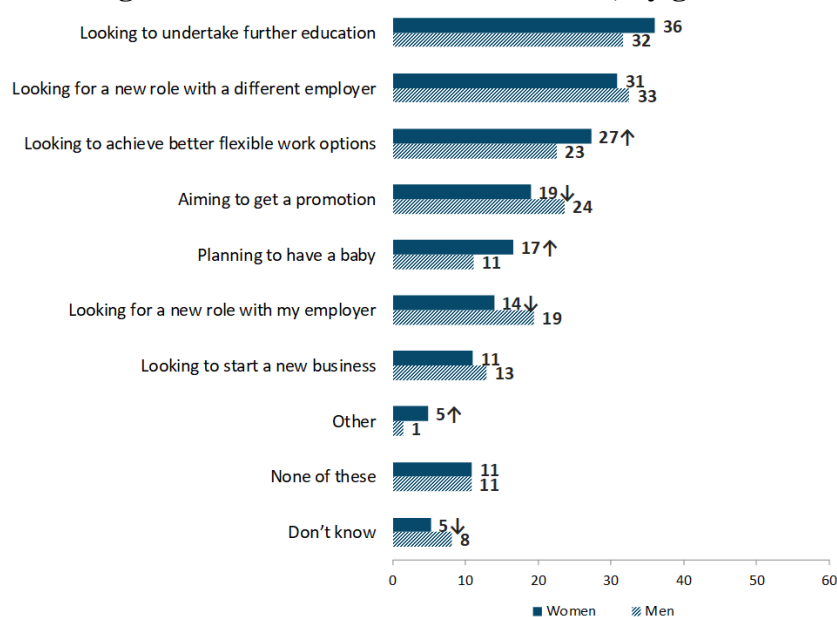
Young women were more likely to consider racial prejudice as evident in the Australian workplace, than gender inequality. Only 28% agree that all Australians are treated equally in the workplace, irrespective of their cultural background. 42% do not think all Australian are treated equally in the workplace. When asked about their own workplaces, perceptions were more optimistic: 64% of women agree that people are not discriminated against in their workplace on the basis of their cultural background, although 16% think this does happen.

On the question of racial equality in the future, women are more optimistic than men. Four in ten women (43%) think racial equality in Australian workplaces will improve over the next decade compared with 36% of men. Men were more likely to think there would be no change and 9% of men and women think it will get worse. Again, younger women tend to be more confident about the future. Half of those aged 16-20 (53%) think that racial equality within the workforce will improve in the next decade (compared with 34% of those 31-40 years).

3.4 Planning for the future at work:

The attributes that young women value in a workplace, and the things they identify as important for their future success at work, are reflected in women's specific plans for the next 24 months (see Figure 6). One third (36%) are looking to undertake further education, a third (31%) are looking to change jobs, and a quarter (27%) are looking to improve flexibility in their work. Women are more likely than men to prioritise or plan on achieving greater flexibility in their roles (27%; compared to 23% of men) and/or have a baby (17%; compared with 11% of men) while men are more likely to be aiming for a promotion or role change (24% compared to 19% of women; and 19% compared to 14% of women). But in general, men and women in this age group have, more or less, similar plans and priorities for the next 24 months (from the options provided).

Figure 6: Plans for the next 24 months, by gender



This data is in response to the question: What are your plans for the next 24 months? Please tick as many as apply. (Base: All working women under 40, n=2,109 and all working men under 40, n=502)

4. Conclusion and Recommendations

The AWWF Project 2017 shows that young women are job and career orientated and generally optimistic about the future of work. They value respect in the workplace, job security, flexibility, predictable hours, a measure of control and influence in the workplace, and making a contribution to others. They aspire to having a job that pays well and in which they are able to be promoted. In order to succeed at work young women report they require the right skills and qualifications, workplace flexibility, paid leave to care for family, support and mentoring in the workplace and a partner who shares childcare and domestic work. When these needs are met young women are able to work the hours they desire.

Young women are ready to make the future of work a success, for themselves, their households and the Australian economy and society. However most workplaces are not yet ready to meet young women's aspirations and only around 50% of young working women think that gender equality will improve in the next 10 years. The mismatch between what young women value in work, their aspirations and their current experience as reported in the AWWF Project 2017 provides a clear call to government and business to step up and take action for change. Public policy settings, while improving, remain inadequate. They must be redesigned to support gender equality in the future of work. Below we list some key recommendations based on the AWWF Project 2017.

Implement recommendations from past government inquiries into gender equality at work

Australian governments, policymakers and researchers have developed a large and comprehensive body of knowledge about gender inequality in the Australian labour market and its impact on women's socio-economic security. Numerous government inquiries have been held into various aspects of gender inequality at work, including pay equity (2009); childcare (2014); women's economic security in retirement (2016); and gender segmentation of the labour market (2017). The Australian government's most recent action plan, Towards 2025 (Commonwealth of Australia 2017) responds directly to the G20 Labour and Employment Ministerial Declaration, 2014 Annex D and includes policy priorities for boosting female workforce participation, quality of employment and gender equity.⁸ Recommendations and strategies from these inquiries and research demonstrate that a multi-faceted/multi-level approach is required to address gender inequality in the Australian workplace and economy. The recommendations developed by these inquiries provide a clear pathway to gender equality in the future of work and would contribute to addressing many of the gaps identified in the

⁸ G20 Labour and Employment Ministerial Declaration, Melbourne, 10-11, September 2014, Annex D (especially recommendations 2,5,6,9 and 11) <https://www.dol.gov/ilab/media/pdf/2014-G20-Ministerial-Declaration.pdf>

AWWF Project 2017. Determined political commitment to implementing these recommendations is urgently required.⁹

Promote Pay Equity

Recent government inquiries and scholarly work on the dynamics of the gender pay gap in Australia have come to similar conclusions on strategies to promote pay equity. In response to problems identified by young working women in the AWWF Project 2017 about low pay, labour market segmentation, job insecurity and women's disproportionate responsibility for unpaid care, we specifically endorse the recent recommendations on pay equity made in The Senate Finance and Public Administration References Committee report on Gender segregation in the workplace. In particular, Recommendation 1: That the Office for Women in the Department of the Prime Minister and Cabinet lead the development and implementation of a national policy framework to achieve gender pay equity in Australia; and Recommendation 2: That the Fair Work Act 2009 be amended to improve its capacity to address equal remuneration, including, introducing gender pay equity as an overall object of the Act; and the provision of guidance for both the Commission and applicant parties on making and applying for orders of equal remuneration (The Parliament of the Commonwealth of Australia, 2017: 58-60).

Extend and improve policies to recognise, reduce and redistribute family and community care responsibilities

AWWF Project 2017 data findings are unequivocal about the positive role that flexibility in the workplace plays in securing women's future success in work. Young women want to have and care for children, family and their community. They also want their partners to share responsibility for childcare and household domestic work. Gender-neutral workplace flexibility measures are essential to supporting a more equitable division of labour in the home and workplace. This will include equal access to paid parental leave, flexible work options and industry specific measures. Gender neutral provisions will help to mitigate some of the determinants of gender segregation in the labour market and promote pay equity.

Workplace policies must be supported by more robust legislative provisions. For example, the current right to request flexible working arrangements provided under the Fair Work Act 2009 must be reinforced by provisions for employees to appeal decisions. The findings of the AWWF Project 2017 also support Recommendation 3 of the Australian Human Rights Commission's 'Supporting Working Parents: Pregnancy and Return to Work, National Review', to amend the Sex Discrimination Act 1984 (SDA) to: extend the discrimination ground of 'family responsibilities' under the SDA to include indirect discrimination; and include a positive duty on employers to reasonably accommodate the

⁹ *Towards 2025* includes implementation plans for each strategy which will be reported against annually. These will be publicly available (Commonwealth of Australia 2017). We affirm the government's commitment to accountability and transparency in reporting.

needs of workers who are pregnant and/or have family responsibilities (Australian Human Rights Commission, 2014: 12).

Ongoing government and private sector financial commitment to delivering a ‘joined-up’ system of paid parental leave and improved access to affordable and high quality early childhood education and care services, including out of school hours care, will support gender equality in the future of work. Gaps in policy design can leave families with periods in which social care is unavailable. Typically women fill the gap by reducing their attachment to the labour market.

Policies to ensure greater gender equality in care include: extending the 18 weeks of parental leave pay (PLP) and 2 weeks of Dad and Partner Pay (DaPP) currently provided by the Commonwealth government program to 26 weeks in the near term and eventually 52 weeks; raising the payment level for PLP/DaPP from the minimum wage; providing for a longer period of DaPP on a ‘use it or lose it’ basis; and providing for payment of the superannuation guarantee during PLP/DaPP. These changes will support women’s attachment to the workforce, improve women’s economic security and encourage a more equitable sharing of care responsibilities between parents.¹⁰

Ensure the conditions of decent work, especially in highly feminised sectors

Decent work is goal eight of the Sustainable Development Goals 2030¹¹ and is as important in wealthy countries like Australia as it is in emerging economies (Charlesworth and Macdonald 2015). The AWWF Project 2017 data shows that young women experience gaps in their access to many of the attributes of decent work (ILO 1999). Strong evidence of young women not earning enough to pay their bills reflects Australia’s stubborn gender pay gap and gender segmented labour market. Projected growth in feminised low paid jobs in health care and social assistance suggest an urgent need for government action to ensure these jobs meet the criteria of decent work and that the principle of ‘equal pay for work of equal value’ is able to be applied. Current trends toward fragmentation and the contracting out of employment arrangements in the paid care sector are undermining many of the criteria of decent work, making this a pressing policy issue for gender equality in the future of work. Other gaps in young women’s experience of respect, control and influence in the workplace, access to training opportunities, paid leave to care for family, and adequate flexibility in work, all point to the need for a strong commitment by government and business to delivering the conditions of decent work.

Be attentive to young women workers

The focus of the AWWF Project 2017 is young Australian women. These women are the future of work and the workforce. Our findings show that young women are generally optimistic about their

¹⁰ See W+FPR 2016:6-8.

¹¹ <http://www.undp.org/content/undp/en/home/sustainable-development-goals/goal-8-decent-work-and-economic-growth.html>

working futures. Very young working women, those aged 16-20, are the most positive - hopeful about the future of gender and racial equality in the workplace, ambitious, and most likely to say that having a job where they can be promoted and get ahead matters a lot. But they are the group least likely to feel that their current job allows them to use their skills, knowledge and abilities. These findings may be specific to their stage of life and employment, but if the future of work is to be gender equal, then the optimism that very young working women bring to the future of work must be nurtured. Very young women present themselves in the AWWF 2017 as a positive force for a more equal future of work. Their voices, ideas, contributions and expectations must be included in official policy and strategy documents such as the Commonwealth government's *Towards 2025*. Young women must participate in the formation of policy that impacts their future at work.

Undertake further research on gendered attitudes to technological change

The results of the AWWF Project 2017 show clear differences between women's and men's expectations about the impact of technological change on their jobs. More gender sensitive and specific research is urgently needed to understand the way in which gender contributes to these differences and to the effects of technological change on labour market segmentation.

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Appendix A: Summary of Survey Sample

Women employed in:	
Private sector	55%
Public sector	28%
Not-for-profit	6%
Women's employment status	
In own business	6%
For an employer	55%
Casual/freelance/short term contract	19%
Member of trade union	17%
Highest education level completed	
University - Bachelor/Post grad	46%
TAFE - diploma/advanced dip.)	28%
High school Year 12	17%
High school Year 11	4%
Women with at least one dependent child	
	38%
Proportion of those with at least one	
0-5 year old	54%
5-17 year old	55%
Number of jobs held	
One	85%
At least two	15%
Working hours	
0-21 hours/week	31%
26-40 hours/week	49%

Access to entitlements

Paid sick leave	67%
Paid annual leave	65%
Paid parental leave	42%
Paid carers leave	43%

Appendix B: Methodology

In-scope population

The aim of the project is to understand the experience of working women, aged under 40. The quantitative sample was designed to be representative of this audience, based on Australian Bureau of Statistic demographic quotas.

As the number of Aboriginal and Torres Strait Islander women likely to be interviewed in this achieved sample would be too small for separate analysis, a booster sample of this group was included.

In addition, a parallel sample of working men aged under 40 were interviewed. This was undertaken in order to be able to contrast the experience of working people by gender, and highlight where there are differences and similarities between the working experience of women and men.

Qualitative fieldwork

Cognitive interviews

Six cognitive interviews were conducted with working women to investigate how they interpreted and responded to the draft version of the questionnaire to be used in the main quantitative phase to follow. Each cognitive interview was delivered in the manner of a computer-aided telephone interview (CATI), that is, with the interviewer reading out the questions to the respondent. The cognitive interviews phase ensured:

Questionnaire validity (i.e. that questions were understood, consistently interpreted and measured what they were intended to measure).

The questionnaire flowed in a logical order, and that routing instructions ensured clients were only asked questions covering the procedures they received at assessment.

Individual questions were relevant and that no crucial question areas were missing (from the client's perspective).

A range of working women were included in the cognitive interviews:

Mix of ages

n=2 16-25 years

n=2 26-32 years

n=2 33-40 years

Included n=2 participants who were both low educational attainment and low income

Included women in a variety of roles:

n=2 in middle skilled roles (e.g. education, health/nursing)

n=2 professionals (e.g. Lawyers, accountants, engineers)

n=2 lower skilled roles (e.g. retail, tradespeople, manufacturing)

Included n=1-2 Culturally and Linguistically Diverse respondents

Cognitive interviewing was conducted in two stages. Questions identified as problematic in the first stage were redrafted and presented to participants in the second stage or removed altogether. Following the completion of the cognitive interviews, the questionnaire was finalised.

The cognitive interviews were conducted face-to-face in Sydney, between 9th - 14th August. The cognitive interviews too approximately 45 minutes and took place in-home. Each participant was given an incentive to thank them for their time.

Location	Description	Detailed criteria
Group 1: Parramatta	Lower skill/pay and insecure working conditions	<p>Low skill i.e. jobs that require low skill; no to little education qualifications; can be trained quickly for the role.</p> <p>Low pay = 6-8 women earning <\$50,000 annual personal income, and 0-2 women earning \$50,000-\$70,000 annual personal income.</p> <p>“insecure” i.e. contractual work, temporary/casual roles, e.g. in retail, hospitality, care and construction.</p>
Group 2: Brisbane	Lower skill/pay and secure working conditions	<p>Low skill i.e. jobs that require low skill; no to little education qualifications; can be trained quickly for the role.</p> <p>Low pay = 6-8 women earning <\$50,000 annual personal income, and 0-2 women earning \$50,000-\$70,000 annual personal income</p> <p>“secure” i.e. public sector roles, permanent contracts, e.g. public sector admin, human services, childcare, health, transport and manufacturing</p>

Group 3: Brisbane	Higher skill/pay and insecure working conditions	<p>High skill – often denoted by tertiary education</p> <p>High pay = All earning >\$70,000 annual personal income</p> <p>“insecure” i.e. contractual work, managing a business, e.g. professional contractors (IT, HR etc.), professional services roles (but those who are on temporary contracts), professional freelancers (e.g. web designers, consultants), entrepreneurs/self-employed and small business owners</p>
Group 4: Sydney	Higher skill/pay and secure working conditions	<p>High skill – often denoted by tertiary education</p> <p>High pay = All earning >\$70,000 annual personal income</p> <p>“secure” i.e. public sector roles, permanent contracts, e.g. senior public servants, professionals (lawyers, managers in banking and finance, accountants), health professionals, para-professionals private and public sector, chief executives and senior management roles across different industries.</p>
Group 5: Parramatta	Working mothers	Mothers of women working full or part-time, with children aged 0-18.

Group discussions

All women who participated in the discussion groups were aged 18-40 and working. The table below summarises the design of the five discussion groups conducted:

Recruitment

QRA, a specialist qualitative recruitment agency with ISO2052 accreditation, was responsible for inviting individuals to participate in the research. Nine participants were recruited per group, for 6-8 to attend (on average). The recruitment screener is included in the appendices (appendix **Error! Reference source not found.**).

Discussion guide

A discussion guide was developed in close consultation with the University of Sydney team and included dedicated sections for specific audiences. The discussion guide is appended (appendix 10.3)

Moderation

All group discussions were conducted by experienced moderators.

Timeline

The discussion groups were conducted between 9-13 November 2017.

Duration and incentives

The discussion groups were approximately 1½ hours' duration.

Participants received an incentive to thank them for their time. This incentive varied in value, depending on the audience.

Lower skill/pay and insecure working conditions

Lower skill/pay and secure working conditions

Higher skill/pay and insecure working conditions

Higher skill/pay and secure working conditions

Working mothers

Recording and observation

All discussion groups were audio-recorded with participants' permission. Metropolitan groups were also video-recorded.

Quantitative Online fieldwork

Quantitative Design

The main sample of n=2,109 working women aged under 40 from across Australia were interviewed online. In addition, a booster national sample of n=502 working men aged under 40 were interviewed, together with a booster of n=53 Aboriginal and Torres Strait Islander working women aged under 40.

The main online interviewing took place between the 22nd September and 10th October 2017. The booster sample of Aboriginal and Torres Strait Islander women were interviewed between 22nd September and 23rd October 2017.

For the main sample of women and men, Australian Bureau of Statistic based interlocking quotas were set by age and location.

The final sample structures achieved for the main female sample and male sample are detailed below in

Table 1 and

Table 2.

Table 1: Online sample structure (main female sample)

	NSW	VIC	OLD	SA	WA	TAS	NT	ACT
16-20	101	81	77	25	40	8	2	6
21-30	287	247	165	54	98	12	4	17
31-40	299	246	160	52	94	13	6	15
n	687	574	402	131	232	33	12	38

Table 2: Online sample structure (males)

	NSW	VIC	OLD	SA	WA	TAS	NT	ACT
16-20	24	21	18	8	9	2	1	1
21-30	66	55	39	14	20	2	0	4
31-40	73	58	39	13	25	4	1	5
n	163	134	96	35	54	8	2	10

Aboriginal and/or Torres Strait Islander sample

Coolamon Advisors, a consultancy of Aboriginal and/or Torres Strait Islander researchers, was sub-contracted to attract additional Aboriginal and/or Torres Strait Islander participants to the study. Extensive Australian networks with these women were used to achieve this sample, which ordinarily, is especially difficult to reach. Note that this sample is skewed towards women working in the public sector (see Table 3 for further detail) and should be treated as indicative only.

No quotas were placed on this booster.

Table 3: Aboriginal and/or Torres Strait Islander booster

		Achieved
Age	16-20	7
	21-30	21
	31-40	25
Sector (of those who are working)	Public	29
	Private	12
	Not-for-profit	5
Total booster n		53

A summary of the total Aboriginal and/or Torres Strait Islander sample is detailed below in

Table 4:

Table 4: Total Aboriginal and/or Torres Strait Islander sample structure

		Achieved
Age	16-20	20
	21-30	47
	31-40	35
Sector (of those who are working)	Public	41
	Private	24
	Not-for-profit	7
Total booster n		102

Analysis

Qualitative analysis

The qualitative analysis process involved multiple team members listening to and/or watching what was conveyed by participants in groups and interviews, and collectively brainstorming to determine the underlying narrative.

Following each interview or group, moderators who observed the session noted their impressions of the key themes, issues, notable quotes, patterns and points of contention that arose during the course of the discussion.

To ensure that learning and hypotheses from one discussion were brought to bear on the next group or interview, moderators liaised with each other following each 'round' of groups to determine if the flow was effective and all requisite information was obtained, or if changes were needed.

Recordings and notes were reviewed in detail, and a comprehensive thematic analysis conducted, to determine key themes, points of view, trends and patterns in what participants said.

Moderators focused first on what was found, then interpreted what it means, and theorised how it related to the needs of the Institute. The project team then developed the top-line findings in a workshop-style session, as the basis for the presentation and this report.

Quantitative analysis

Weighting

Interlocking weights on age and location were applied to the final achieved main sample to ensure the representativeness of the data was maintained. A profile of the main survey sample can be found at

Table 1.

The booster of Aboriginal and Torres Strait Islander working women aged under 40 is unweighted.

Analysis and reporting of differences

Analysis of survey data was carried out using SPSS and Q data analysis software (software packages used for statistical analyses in social research).

Significance testing was undertaken by testing the proportion of respondents from a particular group who gave a particular response, against the proportion of all other respondents who gave that same response. Where there are two sub-groups (e.g. age) we can say that the sub-groups are significantly different from each other. Where there are more than two sub-groups (e.g. for age), a group reported in the findings as ‘different’ is significantly different from the average for all other groups for that question.

Statistically significant differences are annotated in the following ways throughout the report:

Significant differences between sub-groups of respondents are labelled on charts and infographics (using arrows).

Only instances where significant differences were detected are mentioned in the report.

The data was analysed by the following subgroups:

Age (16-20, 21-30 and 31-40)

Work status (full-time/part-time in own business, full-time/part-time for an employer, casually/freelance/short-term contract basis, looking for work)

Whether they are working multiple jobs

Whether they are studying (in school, TAFE/technical college, university, not studying)

Whether they have children

Metro or regional location – based on ARIA classifications

Sector (public, private, not-for-profit)

Whether they work from home

Education level (Bachelor or higher, TAFE certificate or diploma, secondary school)

Living situation (at home with parents, in own home, in share house)

Disability

Ethnicity (Australia, New Zealand, Pacific, Europe, Asia, Americas, Middle East/Africa)

Culturally and Linguistically Diverse

Aboriginal and/or Torres Strait Island status

Income (low – below \$40,000, medium - \$40,000-\$80,000 and high – above \$80,000)

Aboriginal and/or Torres Strait Islander analysis

The booster sample of Aboriginal and/or Torres Strait islander women is included only in analysis between the non-Aboriginal and/or Torres Strait Islander women and Aboriginal and/or Torres Strait Islander women. The natural fallout of Aboriginal and/or Torres Strait Islander women (n=49) within the main sample has been added to the booster (and removed from main sample) for the purpose of this analysis. The original weighting has been used for the non-Aboriginal and/or Torres Strait Islander women here, and all Aboriginal and/Torres Strait Islander women have been assigned a weight equivalent to 1 (as the booster is unweighted).

Also note that given the unique nature of the booster (see

Table 4), it is not accurately reflective of the Aboriginal and/or Torres Strait Islander female population. As such, it has been excluded from the main sample reporting and sub-group analysis (albeit the natural fallout of Aboriginal and/or Torres Strait Islander women has been included).

Rounding in charts

In some charts, response categories shown may not sum to 100% due to rounding of the numbers displayed. It should also be noted that for questions where multiple responses were allowed response categories may sum to more than 100%.