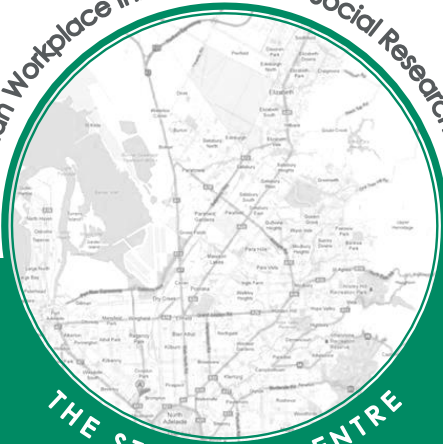


Australian Workplace Innovation and Social Research Centre



THE STRETTON CENTRE

High performance workplaces

Workplace Futures Survey Wave 3
Playford and Salisbury

WISer catalogue no: 2015.12

Rasika Ranasinghe, Ann-Louise Hordacre, Robert Perrett & John Spoehr
2015

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THE UNIVERSITY
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RESEARCH CENTRE



High Performance Workplaces

***Workplace Futures Survey Wave 3
Playford and Salisbury***

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WISeR also specialises in socio-economic impact assessment including the distributional impacts and human dimensions of change on different population groups and localities. Our research plays a key role in informing policy and strategy development at a national, local and international level.

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EXECUTIVE SUMMARY

The *Workplace Futures Survey (WFS) – Playford and Salisbury* is a longitudinal workplace survey implemented in Playford and Salisbury. The WFS is designed to capture in-depth information on a range of workplace issues and trends that will provide a comprehensive picture of the issues and challenges faced by employers in the region.

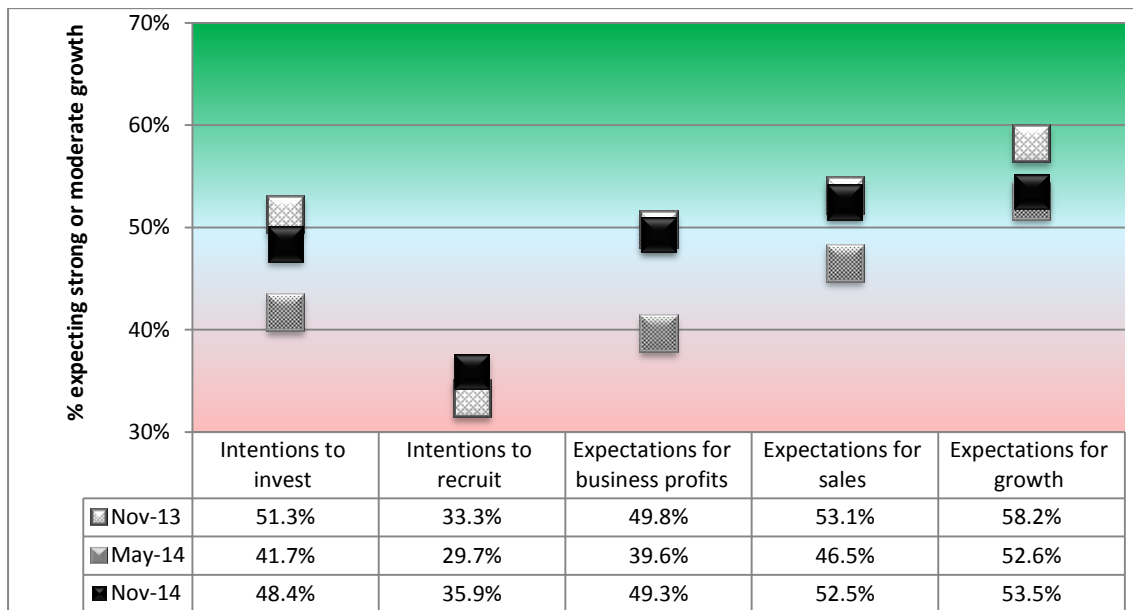
This report focuses on Wave 3 of the WFS which was completed by 387 employers during October to November 2014. Results are compared with Wave 1, which was administered a year earlier (November 2013) to 451 employers and Wave 2 completed in May 2014 by 455 employers.

The WFS includes a number of core questions on business sentiment, organisational performance along with vacancy and skill demand. Wave 2 also contained focus questions on the potential impact of the automotive closure, whereas Wave 3 explores establishment engagement with High Performance Workplace Practices (HPWP).

EMPLOYER SENTIMENT

Employer sentiment remained cautious across all indicators in November 2014, even though there were modest improvements in investment and recruitment intentions over the six months from May to November 2014 (see Figure 1) fewer than 50% of employers were optimistic about growth in the next 12 months.

FIGURE 1: EXPECTATIONS FOR BUSINESS GROWTH OVER THE NEXT 12 MONTHS, NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014 (% OF EMPLOYERS)



With regard to:

- Intentions to invest** in the next 12 months: At November 2013, 12% of employers expected a strong increase in investment over the coming year, while 40% expected a moderate increase. Intentions to invest had fallen to 8% and 34%, respectively, at May 2014. There was a modest improvement in investment intentions by November 2014 with 10% of employers expecting a strong increase and 38% expecting a moderate increase, although this didn't reach the levels reported in November 2013.
- Intentions to recruit** in the next 12 months: One in three employers (33%) expected a strong or moderate increase in their recruitment expectations from November 2013, declining to 30% at May 2014. Recruitment expectations had improved by November 2014, with 36% of employers expecting a strong or



moderate increase in employment over the coming year.

- **Expectations for business profits** in the next 12 months: Almost 50% of employers expected a strong or moderate increase in profits from November 2013. In May 2014, expectations for profits declined to 40%. Employer sentiment rebounded in November 2014 with 49% of employers expecting a strong or moderate increase in profits.
- **Expectations for sales** in the next 12 months: Just over half of employers (53%) expected a strong or moderate increase in sales from November 2013. In May 2014, this share had dropped to 46%, but improved to 53% in November 2014.
- **Expectations for growth** in the next 12 months: Nearly three out of five employers (58%) expected strong or moderate growth from November 2013, with this declining to 53% at May 2014 and remaining so in November 2014.

VACANCIES

The number of vacancies as a proportion of all employment increased to 2.3% in November 2014, from 1.5% in May 2014. This figure was marginally higher at 1.6% in November 2013. Thirteen percent of all employers had one current vacancy in May 2014. This share increased to 21% of employers in November 2014. In May 2014, 60% of employers reported that they did not expect any vacancies in their organisations in the next 12 months. By November 2014, the proportion of employers expecting a vacancy in the next 12 months had dropped to 44%.

The share of employers with a current vacancy at November 2014 increased by eight percentage points to 21% from 13% in May 2014. One in ten employers reported having one vacancy in November 2014 (compared to 5% in May 2014 and 7% in November 2013). The share of employers with two or more vacancies at the time of the survey largely remained consistent. The higher rate of current vacancies is reflected in increased expectations for vacancies during the coming year. Fifty-six percent of employers expected at least one vacancy over the year to November 2015 - an increase of sixteen percentage points from expectations of vacancies to May 2015 (as reported in Wave 2).

One in five (21%) establishments reported vacancies for technicians and trades persons in November 2014, making it the top currently vacant occupation in Playford and Salisbury. Fourteen percent of employers reported vacancies for professionals as well as for labourers. This is in contrast to May 2014 when one quarter of employers had a current vacancy for sales workers. This was followed by professional occupations, where 21% of employers had a current vacancy, and clerical and administrative vacancies with 15% of employers reporting current vacancies. Technicians and tradespersons was the top currently vacant occupation in November 2013 with 21% of employers reporting a current vacancy. This was followed by community and personal services occupations where 16% of employers had a current vacancy, and professional occupations, with 14% of employers having a current vacancy.

At each wave, around one quarter to a third of establishments expected to require technicians and tradespersons during the following year. Expectations of forthcoming vacancies at November 2014 reflected current occupational vacancies, with professionals and labourers expected to be in demand.

HIGH PERFORMANCE WORKPLACE PRACTICES

Questions address the ability, motivation and opportunity (AMO) model that proposes human resource (HR) practices contribute to improved employee performance by developing employees' abilities (A) and skills to do their job, improving an employee's motivation (M) for discretionary effort, and providing employees with the opportunity (O) to make full use of their skills and be motivated.

ABILITY

Most employers agreed they had organisational processes in place to identify the existence of skills and support their development through recruitment and training, with these processes slightly more evident in Salisbury than Playford. While responses were positive across the four items assessing ability, employers were more likely to indicate they provide ongoing training to their employees rather than identifying gaps during recruitment or during the course of their employment, or broaden skills in other areas.

Businesses in the construction industry were most likely to strongly agree they implemented a structured recruitment process focusing on defined and required skills. However, manufacturing and retail organisations

were more likely to support training for skill diversification. Recruitment practices appear to vary by the size of the establishment, with larger businesses more likely to use a structured approach to interviewing and as a means to identify employee training needs. Ongoing training was more readily available in businesses with five or more employees, while enterprises of all sizes were equally inclined to support skill development in a range of roles.

MOTIVATION

Almost all employers indicated they tried to ensure their employees felt secure in their jobs, while more than three-quarters attempted to identify and appropriately reward good performance. However, only two-thirds indicated there was a clear path for employees to develop within the organisation. These patterns were relatively consistent in both Salisbury and Playford. However, Playford enterprises had a tendency to be less sure about their responses.

Almost all manufacturing, construction and health care and social assistance establishments agreed they tried to make employees feel secure in their jobs, with more than four in five retail traders indicating the same. Health care and social assistance organisations were slightly less likely than the other enterprises to strive to identify and reward good performance, despite almost three-quarters indicating this was the case. Businesses in construction were more likely to agree there were clear pathways for development within their organisation.

Smaller establishments (of less than 19 employees) were less likely to strongly agree that they identified and rewarded good performance. Whereas the smallest establishment (1 to 4 employees) were more unsure about their ability to identify and reward good performance, or about whether there was a clear pathway for development within their organisation.

OPPORTUNITY:

Around 70% to 75% of organisations agreed they provide opportunities for employees to meet with managers to receive information about business goals and decisions and to make suggestions. However, enterprises in Playford were less inclined to agree that these opportunities were in place.

Manufacturers were most likely to agree that opportunities to participate in meetings and provide improvement suggestions were available. Approaching 80% of manufacturing and health care and social assistance establishments also provided routine information on business goals and decisions to employees. However, only half the health care and social assistance establishments reported regular meetings between employees and managers. Around 10% of establishments in construction and retail trade were unsure or didn't know about their processes to support opportunities for this sort of two-way communication.

There was a strong trend for larger establishments to have formal processes for employees to make improvement suggestions, increasing from 62% for small (1 to 4 employees) establishments to 89% for organisations with 20 to 199 employees. However, this trend was reversed with regard to the provision of regular manager-employee meetings, which were more common in small establishments.

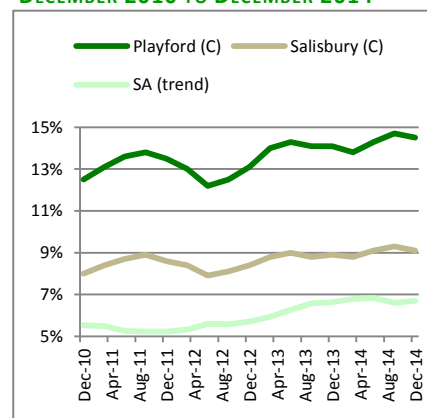
1 INTRODUCTION

The *Workplace Futures Survey (WFS) – Playford and Salisbury* is a longitudinal workplace survey implemented in Playford and Salisbury, and managed by the Australian Workplace Innovation and Social Research Centre (WISer) for the Stretton Centre with funding from the federal government Suburban Jobs Program. The WFS is designed to capture in-depth information on a range of workplace issues and trends that will provide a comprehensive picture of the issues and challenges faced by employers in the region.

The WFS has been conducted at a critical point in South Australian history - and at a time of particular resonance for the northern Adelaide Cities of Playford and Salisbury. The South Australian unemployment rate climbed by one percentage point to 6.7% in the five years to December 2014 (ABS 2015). Unemployment in Salisbury remains more than 40% higher than the state increasing to 9.1% in December 2014 (see Figure 1). Whereas, Playford unemployment is persistently high at more than twice the state average - it was 14.5% in December 2014 - while vacancy rates continue to decline.

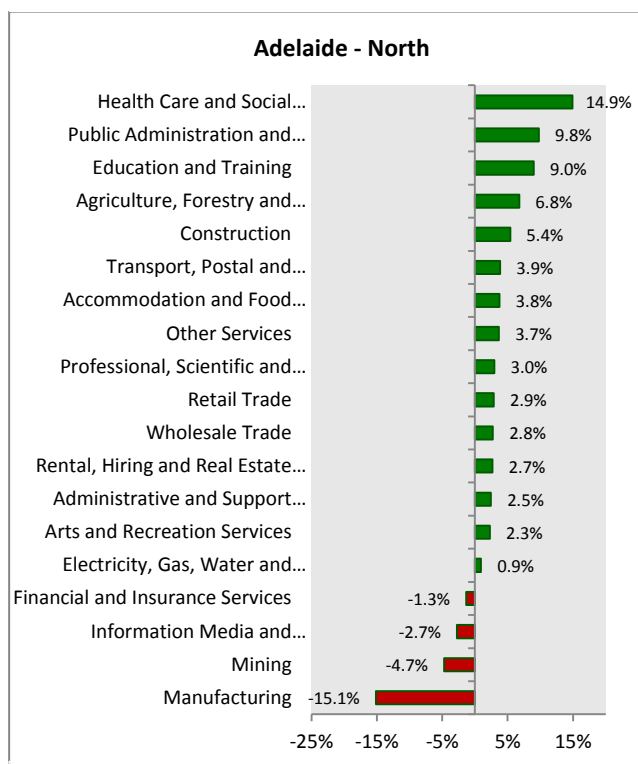
Wave 1 of the WFS was administered in November 2013, and was followed within weeks by the General Motors Holden (GMH)¹ announcement of the end to its Australian operations. Combined with similar announcements by Ford Australia and Toyota Australia this is likely to spell the demise of the Australian automotive manufacturing industry. In this context, this survey provides an invaluable benchmark for workplace environment and business sentiment before (Wave 1) and after the closure announcement (Waves 2 and 3).

FIGURE 2: SMOOTHED UNEMPLOYMENT RATE, SA, PLAYFORD AND SALISBURY, DECEMBER 2010 TO DECEMBER 2014



Source: Department of Employment, 2014a

FIGURE 3: EMPLOYMENT PROJECTIONS, NOV 2013 TO NOV 2018



Source: Department of Employment, 2014b

It is noteworthy that regional employment projections from November 2013 to November 2018² (see Figure 2) were already casting an unfavourable light over the future of manufacturing in Adelaide's north with expected declines of 15.1% equating to over 3,100 employees (Department of Employment 2014). While econometric modelling commissioned by WISer from the National Institute of Economic and Industry Research (2014) indicate within four years of the automotive closure around 10,000 jobs may be lost in the region.

As business sentiment both reacts to and drives the boom and bust cycle, it is important for policy makers to understand the current level of business confidence in the region. In addition, the survey provides the opportunity to explore other areas of workplace practice.

This report presents key findings from the third wave (Wave 3) of the WFS, which was administered in November 2014 and introduced a section on high performance workplace practices. Further, it provides comparisons with the previous two WFS administered in November 2013 (Wave 1) and May 2014 (Wave 2).

¹ Located in the City of Playford.

² Adelaide - North includes the Cities of Playford and Salisbury (as well as Tea Tree Gully, Port Adelaide - East and Gawler - Two Wells). Projections based on figures predating the GMH announcement.

2 WORKPLACE FUTURES SURVEY, PLAYFORD AND SALISBURY

This report focuses on Wave 3 of the WFS which was completed by employers in the Cities of Playford and Salisbury during October to November 2014. The first iteration of this survey, Wave 1 was administered a year earlier (November 2013) and incorporated responses from 451 employers³. Wave 2 of the survey was completed in May 2014 with a total of 455 employers, of which 338 (approximately 75%) were continuing participants from the previous round and the remainder a cohort of new employers.⁴ The current Wave 3 of the survey in November 2014 consisted of a total of 387 employers from Playford and Salisbury, including 292 (75% of the sample) continuing participants. This report presents the findings from Wave 3 of the WFS and provides a comparison with the previous waves of the survey.

Wave 3 of the WFS repeated a number of core questions from previous rounds, with an additional thematic module. Accordingly, the topics covered in Wave 3 include:

- ✓ Organisational details;
- ✓ Employer confidence (measured using five indicators including intentions to invest and recruit, expectations of profits, sales and business growth for the next 12 months);
- ✓ Employment and vacancies;
- ✓ Factors affecting business performance; and
- ✓ Thematic questions: high performance workplace practices (HPWP).

The survey was implemented using Computer Assisted Telephone Interviews (CATI), conducted for WISeR by Harrison Research Inc., a professional market research company. As in the previous rounds, survey notifications were sent to selected organisations prior to the telephone interviews. This provided relevant information including the purpose of the survey, who was conducting the research, who would conduct the interviews, and privacy issues. In addition, participants were provided with a brief report on findings of the previous surveys, which also referred them to the detailed report (available online). The notification also stated that participation was voluntary and provided a means for organisations to opt out of the survey.

2.1 METHODOLOGICAL OVERVIEW

The original sample for the first round of the WFS was drawn from the *Sensis Business Database* which is a comprehensive directory of registered businesses across Australia. The *Sensis* database for the cities of Playford and Salisbury contains a number of establishments with no industry classification (approximately 34% of the total). These listings were included in the sampling framework for Wave 1 of the WFS and were classified under the 'other' industry category⁵.

The primary sampling unit for all waves of the survey is the 'establishment'⁶, and the reference population is any establishment or organisation located in the Cities of Playford and Salisbury employing two or more workers at the index interview. In Wave 2, around 6% of 'continuing' establishments (i.e. establishments participating in both Waves 1 and 2) had only one employee, reflecting a decline in staff numbers between November 2013 and May 2014. There were only six such firms (accounting for 1.6% of the sample) in Wave 3.

³ For detailed information and findings from Wave 1 of the WFS, please refer to Ranasinghe *et al.* (2014a).

⁴ The second wave of the WFS included a thematic module on the impacts of the auto industry closure (Ranasinghe *et al.*, 2014b).

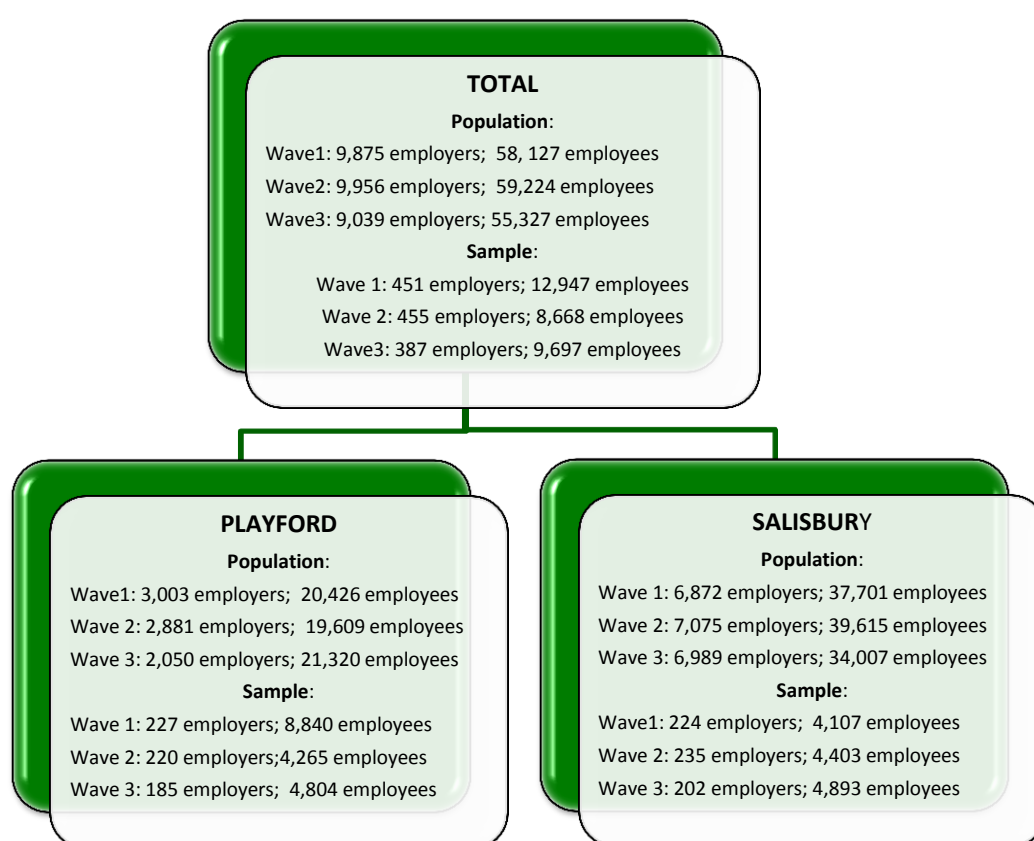
⁵ Waves 2 and 3 did not recruit any further employers from listings without industry classifications. However, all employers included in Waves 1 and 2 were eligible and approached to participate in the follow up surveys.

⁶ Throughout the report, the terms establishment, organisation and employer are used interchangeably to minimise repetition and improve readability.

As in Wave 2 of the survey, contacting participants from previous rounds was prioritised in order to maintain the longitudinal nature of the survey. A simple random sample was drawn for the top-up sample for logistical and practical reasons. Appropriate industry weights are calculated and applied in the analysis⁷.

WFS Wave 3 was comprised of 387 establishments with a total of 9,697 employees, of which 185 firms (with 4,804 employees) were from Playford and 202 firms (with 4,893 employees) were from Salisbury. The attrition rate from Wave 2 to Wave 3 was 36% which is relatively high compared to 25% attrition from Wave 1 to Wave 2 - but is not unusual for longitudinal surveys. Interviewers also faced considerable difficulty in recruiting participants for the top-up sample, which resulted in the low overall sample size in Wave 3. Figure 3 below illustrates the distribution of the population and sample within each location across the three waves⁸.

FIGURE 4: POPULATION AND SAMPLE DISTRIBUTION, WAVES 1, 2 AND 3



WISeR 2015

Appendix A contains detailed information about the size of establishments, employment type and industry distribution with comparisons between Waves 1, 2 and 3. Of note, the average number of employees per establishment declined from 22.9 in November 2013 to 20.7 in November 2014, but remained unchanged between May and November 2014 (see Figure 42). Nearly 54% of employers did not see any change in staff numbers during the 12 months between November 2013 and November 2014.

With regard to employment type, the proportion of establishments that did not employ any full-time staff continued decline. Only 5% of firms in November 2014 had no full-time

⁷ Employment weights are based on ABS Census (2011), and establishment weights are based on the *Sensis* business data for Playford and Salisbury. While all reasonable care has been in their calculation, the figures presented should be interpreted only as indicative.

⁸ The reference employee population is based on employment by industry data from the ABS Census (2011).

employees, reflecting a 3 percentage point decline from May 2014, and a 6 percentage point decline from November 2013. On the other hand, the share of firms with no part-time employees increased during the same period. Just over one half (54%) of employers had no part-time workers in November 2014, reflecting a 6 percentage point increase from November 2013.

The share of establishments with no casual employees fell from 70% in November 2013 to 60% in May 2014 and to 48% in November 2014 with a corresponding increase in those with 1 to 4 casual employees. The distribution of establishments with apprentices in their workforce has not changed significantly across the two waves with 81% of establishments with no apprentices in November 2014.

3 EMPLOYER SENTIMENT INDICATORS

Employer sentiment remained cautious across all indicators in November 2014, even though there were modest improvements in investment and recruitment intentions over the six months from May to November 2014 fewer than 50% of employers were optimistic about growth in the next 12 months. Few employers reported expectations of a decrease over the next 12 months, although this proportion had increased in relation to intentions to invest and expectations for business profits. Over one third of employers expected no change over the forward period.

- **Expectations for growth** in the next 12 months: Nearly three out of five employers (58%) expected strong or moderate growth from November 2013, with this falling to 53% at May 2014 and remaining flat at 53% in November 2014.
- **Expectations for sales** in the next 12 months: Just over half of employers (53%) expected a strong or moderate increase in sales from November 2013. In May 2014, this share had dropped to 46%, but improved to 53% in November 2014.
- **Expectations for business profits** in the next 12 months: One in two employers expected a strong or moderate increase in profits from November 2013. In May 2014, expectations for profits had dropped to 40%. Employer sentiment rebounded in November 2014 with 49% of employers expecting a strong or moderate increase in profits.
- **Intentions to recruit** in the next 12 months: One in three employers (33%) expected a strong or moderate increase in their recruitment expectations from November 2013, this had fallen slightly to 30% at May 2014. Recruitment expectations had improved by November 2014, with 36% of employers expecting a strong or moderate increase in employment over the coming year.
- **Intentions to invest** in the next 12 months: At November 2013, 12% of employers expected a strong increase in investment over the coming year, while 40% expected a moderate increase. Intentions to invest had fallen to 8% and 34%, respectively, at May 2014. There was a modest improvement in investment intentions by November 2014 with 10% of employers expecting a strong increase and 38% expecting a moderate increase, although this didn't reach the levels reported in November 2013.

The WFS captures five distinct but related aspects of employer sentiment which are used to derive the composite Workplace Futures Index (WFI) for comparison across the three waves of the survey.⁹ Employers were asked to rate on a five-point scale¹⁰ their expectations in relation to their:

- ✓ Intentions to invest in the next 12 months
- ✓ Intentions to recruit in the next 12 months
- ✓ Expectations for business profits in the next 12 months
- ✓ Expectations for sales in the next 12 months
- ✓ Expectations for growth in the next 12 months

Employer responses to these indicators across all three rounds of the WFS (November 2013, May 2014 and November 2014) are presented in Figure 38.¹¹ Overall, the latest round of the survey in November 2014 indicates a modest improvement of employer sentiment across most indicators from May 2014 following a decline from November 2013.

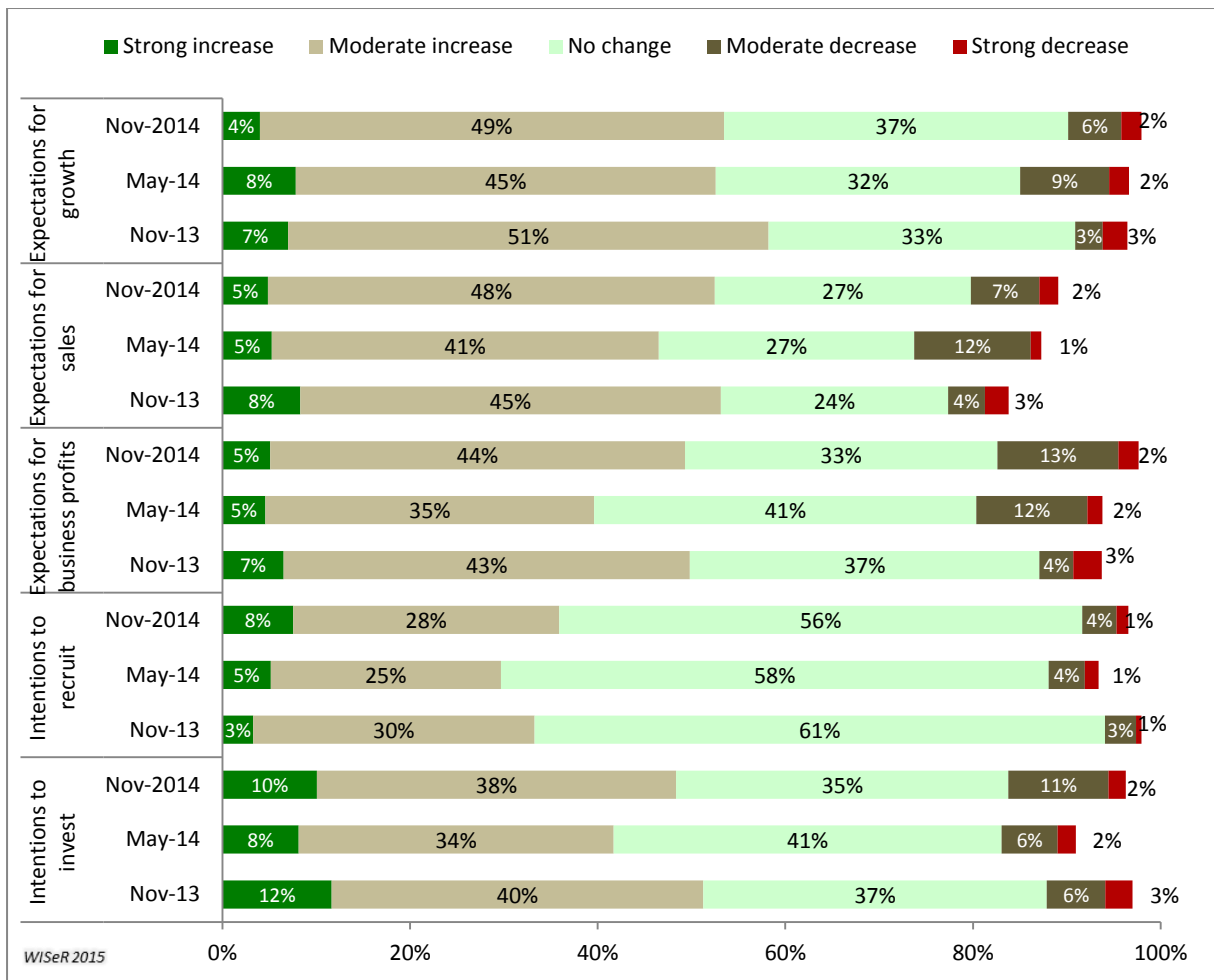
Employer expectations for **business growth** to November 2015 remained flat between May and November 2014, with 53% indicating an expectation of growth (compared to 58% in November 2013). One third of employers did not expect a change in growth in the first two waves, while the proportion was slightly higher (37%) for Wave 3 in November 2014. The share of employers who expected a strong or moderate decrease in growth fell to 8% in November 2014 from 11% in May 2014. This figure stood at 6% in November 2013.

⁹ See Ranasinghe et al (2014c) for details of index construction and related information.

¹⁰ The scale ranges from a high of 'strong increase' to a low of 'strong decrease'.

¹¹ For clarity of presentation, unsure/not applicable responses are not included in the figure. These details are available in the data tables in Appendix B.

FIGURE 5: BUSINESS SENTIMENT INDICATORS FOR THE NEXT 12 MONTHS, NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014 (% OF EMPLOYERS)



November 2013: Weighted base: 8,228 employers; unweighted base: 3,336 employers.

May 2014: Weighted base= 8,685 employers; unweighted base =406 employers.

November 2014: Weighted base: 8,613 employers; unweighted base: 399 employers.

Note: Not applicable/unsure responses are not shown.

Just over one in two employers (53%) expected an increase in **sales** in the next 12 months to November 2015 – an increase of seven percentage points from expectations in May 2014, but on par with November 2013. In the latest wave (November 2014), 9% expected a decrease in sales (of which 7% expected a moderate decrease) in the next 12 months. The share of employers who expected no change in sales from May to November 2014 remained flat at 27%.

One half of establishments expected an increase in **profits** in Wave 1 of the survey in November 2013. This dropped to 40% by May 2014, but rebounded to 49% in the latest wave in November 2014. One third (33%) expected no change in business profits in the 12 months to November 2015 – an eight percentage point decrease from May 2014.

Employers continued to be cautiously optimistic in their hiring expectations in November 2014 with 36% expecting an increase in **recruitment** in the coming year. This is a six percentage point increase from May 2014 (30%), but only a three percentage point increase from November 2013 (33%). In November 2014, more than half (56%) did not expect a change in recruitment over the following 12 months, a slight decline from expectations in May 2014 (58%) and November 2013 (61%).

Employer confidence was buoyant in November 2014 regarding **intentions to invest** in the next 12 months. Nearly one half (48%) of employers expected a strong or moderate increase in their investment intentions in the coming year, compared to the 42% in May 2014. This however fell slightly short of intentions to invest (52%) in November 2013. The share of employers that expected a moderate or strong decrease in investment increased to 13% in November 2014 from 8% in May 2014 and 9% in November 2013.

4 VACANCIES AND SKILLS DEMAND

The number of vacancies as a proportion of all employment increased to 2.3% in November 2014, from 1.5% in May 2014. This figure was marginally higher at 1.6% in November 2013. Thirteen percent of all employers had one current vacancy in May 2014. This share increased to 21% of employers in November 2014. In May 2014, 60% of employers reported that they did not expect any vacancies in their organisations in the next 12 months. By November 2014, the proportion of employers expecting a vacancy in the next 12 months had dropped to 44%.

At November 2014 the top currently vacant professions were technicians and trades persons (21%), professionals (14%) and labourers (14%). This is in contrast to May 2014 where sales workers (25%) were the most commonly vacant occupation, followed by professionals (21%) and clerical and administrative (15%). Professionals (14%) had also been high on the vacant occupation list in November 2013, following technicians and tradespersons (21%) and community and personal services (16%).

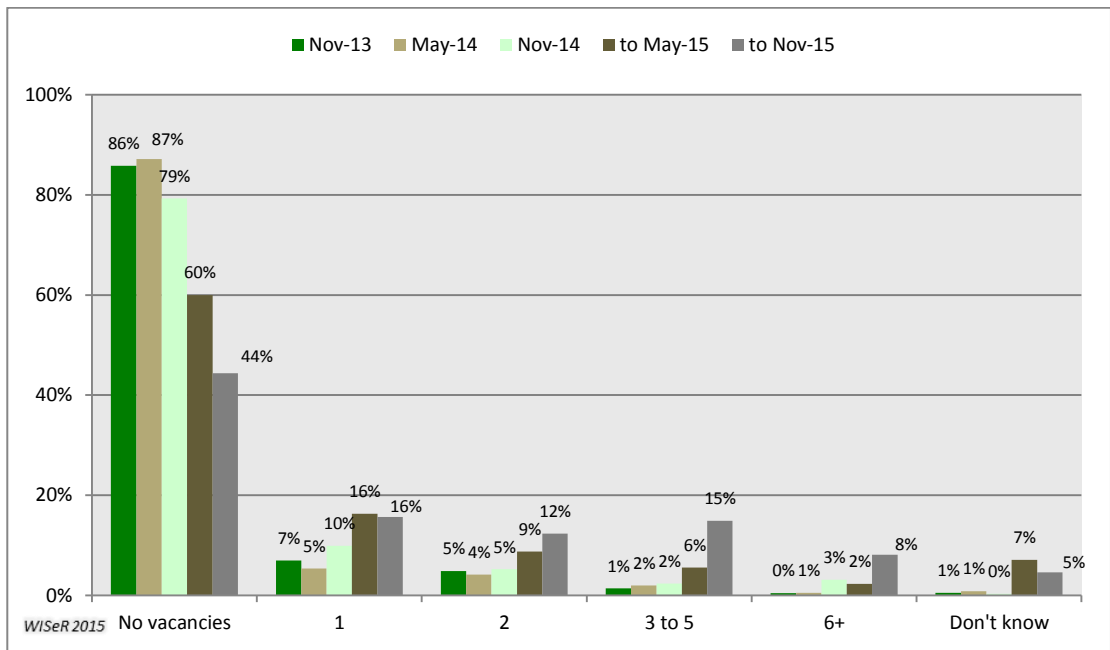
At each wave, around one quarter to a third of establishments expected to require technicians and tradespersons during the following year. Expectations of forthcoming vacancies at November 2014 reflected current occupational vacancies, with professionals and labourers expected to be in demand.

The number of vacancies as a proportion of all employment increased to 2.3% in November 2014, from 1.5% in May 2014. This figure was marginally higher at 1.6% in November 2013. The November 2014 *Vacancy Report* indicates that there were 7,745 vacancies in South Australia, of which 6851 were in the Adelaide region (Department of Employment, 2015). Based on the November 2014 WFS data, the estimated vacancies in Playford and Salisbury would account for approximately 19% of all vacancies in Adelaide region and 16.5% in South Australia.

Figure 39 presents current vacancies reported by employers at the time of the survey along with expected number of vacancies in the next 12 months. The share of employers with a current vacancy at November 2014 increased by eight percentage points to 21% from 13% in May 2014 (see Figure 39). One in ten employers reported having one vacancy in November 2014 (compared to 5% in May 2014 and 7% in November 2013). The share of employers with two vacancies at the time of the survey largely stayed the same (5% in November 2014 and 2013 and 4% in May 2014). Establishments with three to five vacancies also stayed the same (2% in November 2014 and 2013 and 1% in May 2014).

The higher rate of current vacancies is reflected in increased expectations for vacancies during the coming year. Fifty-six percent of employers expected at least one vacancy over the year to November 2015 - an increase of sixteen percentage points from expectations of vacancies to May 2015 (as reported in Wave 2). The share of employers expecting just one vacancy in the next 12 months was 16% in both November 2014 and May 2014 surveys. The share of employers expecting two vacancies in the following year increased from 9% in Wave 2 (to May 2015) to 12% in Wave 3 (to November 2015). The share of employers expecting three to five vacancies in the next 12 months increased to 15% in the latest round in November 2014 - a nine percentage point increase from 12 month expectations reported in Wave 2. The share of employers expecting six or more vacancies in the coming year also increased in Wave 3 to 8%. The data indicates that compared to the previous rounds of the survey, employers had a more optimistic view of their hiring expectations in the coming year, which is consistent with the employer sentiment indicators discussed in Section 5.

FIGURE 6: VACANCIES BY ESTABLISHMENT, NOVEMBER 2013 TO NOVEMBER 2015 (%)



November 2013 base: All employers (weighted=9,875; unweighted=451).

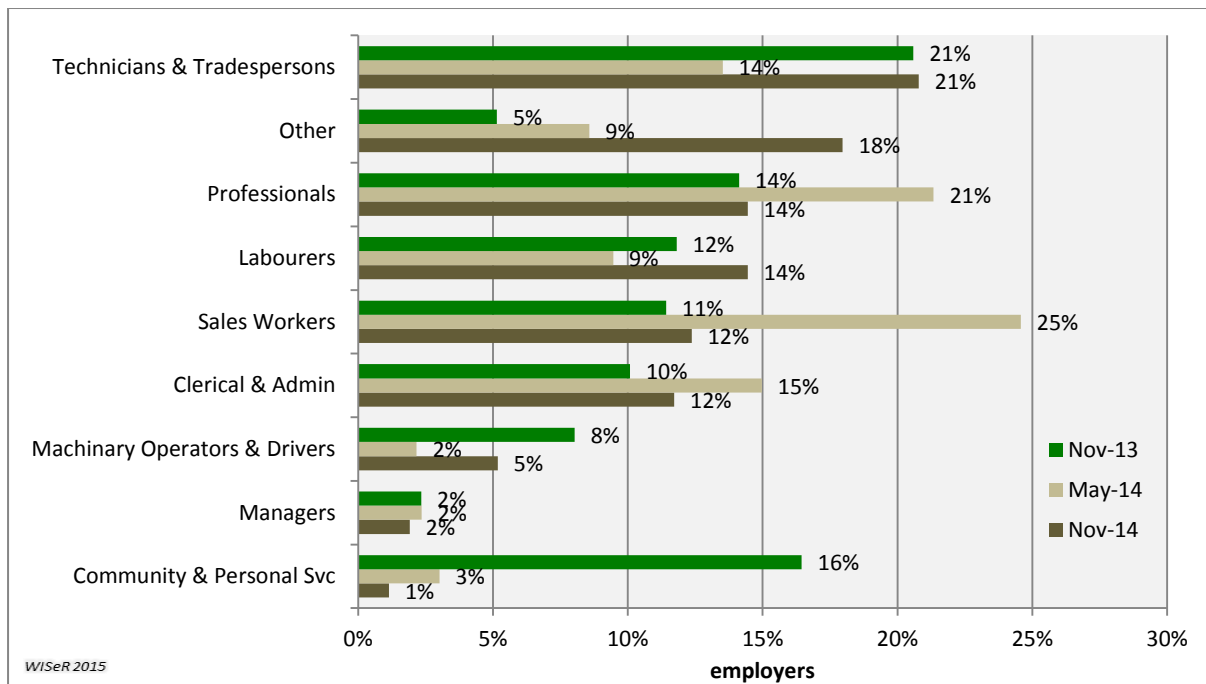
May 2014 base: All employers (weighted=9,956; unweighted=455).

November 2014: Weighted base: 9,013 employers; unweighted base: 386 employers.

Displays vacancy (Nov 2013, May 2014 and Nov 2014) and expected vacancies (to May 2015 and Nov 2015).

Figure 40 illustrates the vacant occupations for establishments reporting at least one current vacancy. Just over one in five employers (21%) reported having vacant positions for technicians and tradespersons in November 2013, which dipped to 14% in May 2014 and rebounded to 21% in November 2013. A similar pattern was shown for both labourers and machinery operators and drivers, both occupations dipping during May 2014 and rising again in November 2014. Vacancies for professionals, sales workers and clerical and administration all peaked in May 2014 before dropping back in November 2014 to similar rates as the previous year (November 2013). Of particular note, there were double the vacancies for sales workers in May 2014 than in either November 2013 or November 2014. Community and personal services vacancies had declined sharply over time with only 1% of employers reporting vacancies in these occupations in November 2014, having declined from 3% in May 2014, and from 16% in November 2013.

FIGURE 7: VACANT OCCUPATIONS, NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014 (% OF EMPLOYERS WITH VACANCIES)

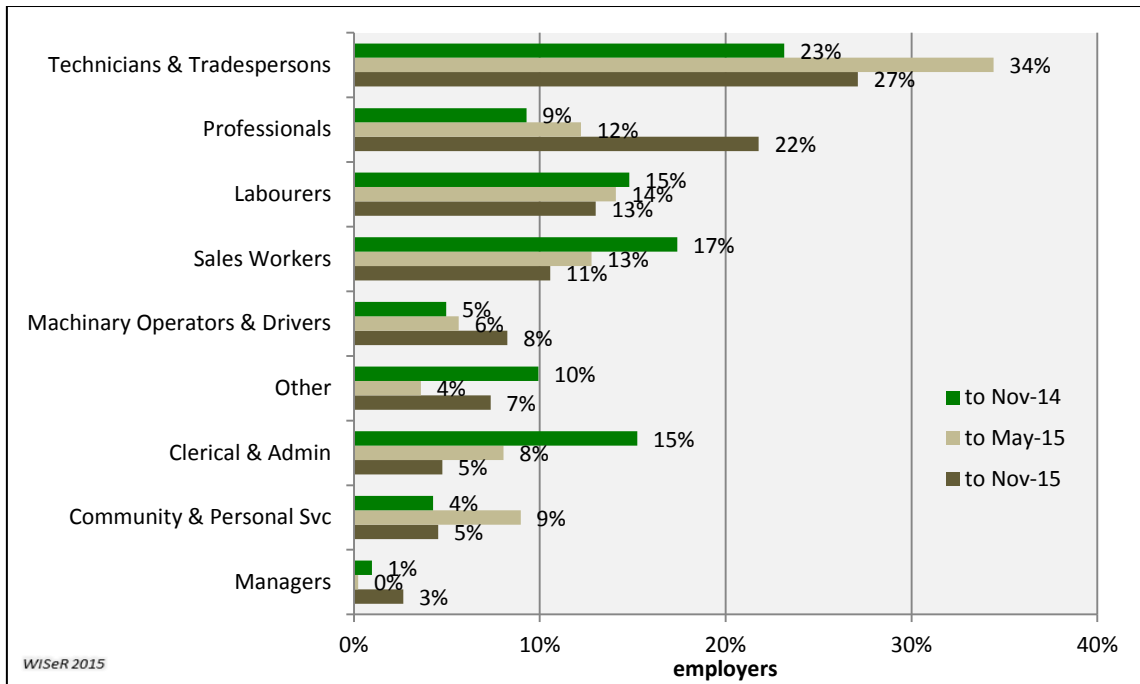


November 2013: Weighted base: 1,342 employers; unweighted base; 86 employers.
 May 2014: Weighted base= 1,261 employers; unweighted base =65 employers.
 November 2014: Weighted base= 1,844 employers; unweighted base =74 employers.

At Wave 3 (November 2014) more than one in two employers (54%) expected a vacancy in the next 12 months. This reflects almost a twenty percentage point increase from Wave 2 (May 2014), and a ten percentage point increase from Wave 1 (November 2013). As illustrated in Figure 41, technicians and tradespersons are expected to continue to be the most in demand, with 27% of employers in Wave 3 (November 2014) anticipating such a vacancy in the next 12 months. However, vacancy expectations had declined from May 2014 when one third (34%) of employers expected a vacancy for technicians and tradespersons. On the other hand, there is an expectation that vacancies for professionals will grow (with 9% of establishments at Wave 1 expecting a vacancy of over the coming year, 12% at Wave 2 and 22% at Wave 3). The share of employers reporting anticipated vacancies for labourers did not change significantly across the three waves.

The share of employers expecting vacancies in sales over the coming year continued the decreasing trend with only 11% of employers expecting such a vacancy in Wave 3. This is a decline from 13% in Wave 2 and 17% in Wave 1. The expected one-year demand for machinery operators and drivers increased marginally, from 5% in November 2013 to 8% in November 2014. The demand for clerical and administrative occupations continued the declining trend with only 5% of employers anticipating vacancies over the coming year at Wave 3, representing a decline from Wave 2 (8%) and Wave 1 (15%). The demand for community and personal services occupations also declined from 9% in the Wave 2 to 5% in Wave 3. Employers anticipating the demand for managerial occupations increased marginally to 3% in Wave 3.

FIGURE 8: OCCUPATIONS REQUIRED NOVEMBER 2014 TO MAY 2015 (% OF EMPLOYERS EXPECTING A VACANCY WITHIN 12 MONTHS)



November 2013: Weighted base: 4,203 employers; unweighted base: 214 employers.
 May 2014: Weighted base= 3,326 employers; unweighted base =156 employers.
 November 2014: Weighted base: 4,599 employers; unweighted base: 201 employers.

5 HIGH PERFORMANCE WORKPLACE PRACTICES

High Performance Workplace Practices (HPWP) are usually presented as an alternative to traditional Taylorist¹² management systems which were based on hierarchical organisations in which managers exercise centralised control over workers, who are given little discretion and treated as passive members within the production process (Lindbeck and Snower, 2000). By shifting from a system of management based on concepts of ‘controlling’ workers to one focused instead on attaining higher levels of ‘commitment’ HPWPs and the systems that underpin them aim to improve individual and thereby organisational performance (Walton, 1985).

The ability, motivation and opportunity (AMO) model, initially proposed by Bailey (1993) and developed by Appelbaum *et al.* (2000), is a commonly accepted framework to explain how human resources (HR) policies might work and impact on performance, and is helpful in deciding which HR policies should be developed and implemented. According to Macky and Boxall (2007), most of the studies on high-performance workplace practices use the AMO framework either explicitly or implicitly.¹³ The model proposes that HR practices contribute to improved employee performance by developing employees’ abilities (A) and skills to do their job, improving an employee’s motivation (M) for discretionary effort, and providing employees with the opportunity (O) to make full use of their skills and be motivated.

A (ABILITY)

Ability can be influenced by recruitment and selection to ensure that capable employees are recruited in the first instance, and by training, learning and development. Competency frameworks are a useful tool to express and assess abilities and skills.

M (MOTIVATION)

Motivation is influenced by extrinsic (for example, financial) and intrinsic rewards (for example, interesting work), performance reviews, feedback, career development, employment security, and work-life balance.

O (OPPORTUNITY)

Opportunity is influenced by involvement initiatives, team-working, autonomy, communication, job design and job rotation. Many researchers claim that this is the distinctive feature that distinguishes high-performance working practices from other HR practices (Appelbaum *et al.*, 2000; Wood & Wall, 2007; Boxall & Macky, 2009)

In the model proposed by Appelbaum *et al.* (2000), HR practices contribute to improved employee performance by encouraging employees to exhibit positive discretionary behaviours, as illustrated in Figure 4. Purcell *et al.* (2003) took a similar approach, developing it further in their study. ‘Discretionary behaviours’ refers to the degree of choice people have over how they perform their job, and recognises that employees can contribute more to the organisation than simply enough to get the job done (Purcell *et al.*, 2003)¹⁴. It is closely related to organisational citizenship behaviours.

¹² ‘Taylorist’ management systems refer to the theory of scientific management first proposed by Frederick Taylor in the monograph “The Principles of Scientific Management”, published in 1911.

¹³ See for example, Huselid (1995), Appelbaum *et al.* (2000) MacDuffie (1995) and Purcell *et al.* (2003).

¹⁴ This approach contrasts with traditional Taylorist systems of management which give emphasis to limiting discretion through tightly controlled jobs and tasks, and close supervision.

FIGURE 9: THE AMO MODEL ILLUSTRATED



Source: Adapted from Appelbaum *et al.* (2000).

Implicit in the AMO model is an assumption that managing employees at the individual level brings together a range of HR policies and practices which are inter-related, are mutually supportive, and can be bundled. If any of the key components (A, M, and O) are missing, discretionary effort is unlikely to be forthcoming. For example, an employee may have the ability, skills, and the motivation to perform well, but if not empowered to make decisions, if restricted by the job description, or if not given the right information, performance is likely to be inhibited. Exactly what these HR policies are will vary from sector to sector and organisation to organisation. Appelbaum *et al.* (2000), for example found that the human resources practices associated with AMO had different effects in different industries. In the clothing industry, for instance, they found that self-directed teams were highly influential (raising sewing time by 94% and leading to considerable cost savings); in medical equipment the opportunity to participate was closely associated with profits, value added and quality. West *et al.*, (2002) illustrates how AMO can work in practice in the health sector. It should be noted, however, that other factors in addition to human resources management affect the AMO components (Boxall and Purcell, 2011).

Wave 3 of the WFS incorporated HPWP in a thematic module containing ten selected questions that capture the essential features of the AMO model. Respondents rated the following ten dedicated questions on a five point scale ranging from strongly agree (1) to strongly disagree (5).

- ✓ When recruiting, we first list what skills are required and then focus on these in a structured interview
- ✓ We have procedures in place that successfully identify employee training needs
- ✓ Employees receive ongoing training
- ✓ We often train employees to become skilled in a range of different roles
- ✓ We strive to identify good performance and reward individuals accordingly
- ✓ We try to make employees feel secure in their jobs
- ✓ There is a clear path for employees to develop within this organisation
- ✓ We have formal processes for employees to make suggestions about how things can be improved
- ✓ There are regular meetings between employees and managers (at least once in two weeks)
- ✓ Management frequently communicates wider business goals and decisions to employees

5.1 ABILITY

Ability refers to practices that ensure employees are equipped with the skills needed to undertake their jobs, with a presumption that jobs will be relatively highly skilled. Ensuring that employees have appropriate skill levels to make use of the opportunity to use their discretionary effort through participatory work practices is also important. The

two main routes through which firms can ensure their employees are suitable are recruitment and selection practices that ensure capable individuals are hired in the first place, and training for workers (Huselid, 1995; Appelbaum *et al.*, 2000).

The WFS captures these aspects by means of the following four questions which are disaggregated by city, industry distribution and establishment size:

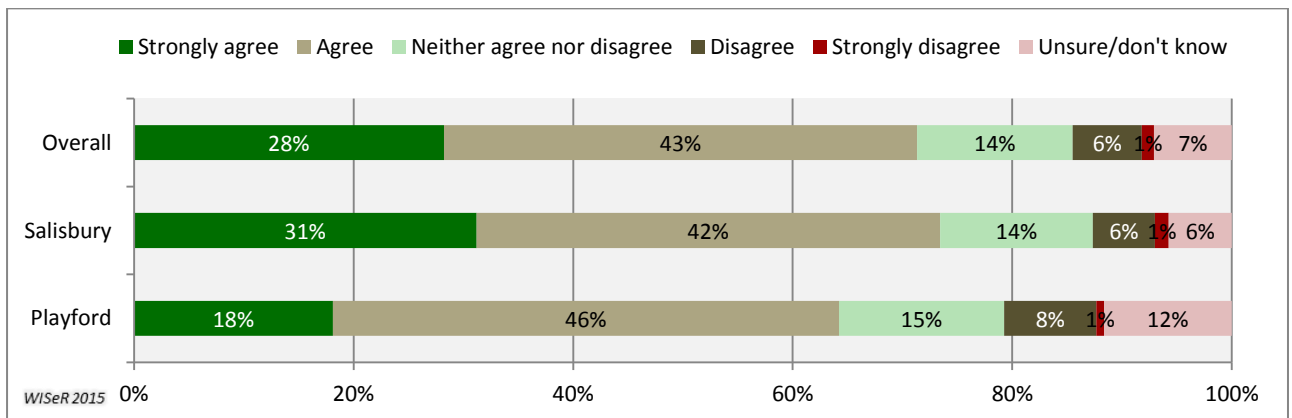
- ✓ When recruiting, we first list what skills are required and then focus on these in a structured interview.
- ✓ We have procedures in place that successfully identify employee training needs.
- ✓ Employees receive ongoing training.
- ✓ We often train employees to become skilled in a range of different roles.

Most employers agreed they had organisational processes in place to identify the existence of skills and support their development through recruitment and training, with these processes slightly more evident in Salisbury than Playford. While responses were positive across the four items, employers were more likely to indicate they provide ongoing training to their employees rather than identifying gaps during recruitment or during the course of their employment, or broaden skills in other areas.

Specifically, employers were asked if they had a structured skills recruitment process which identifies skills needed (Figure 5). Overall, around one in four employers (28%) strongly agreed that they had a structured skills recruitment process, with a further 43% agreeing. Seven percent disagreed to some extent, while another 7% did not know or were unsure of the process.

Of the two cities, Salisbury had more employers with structured skills recruitment in place compared to Playford. Close to one in three employers (31%) in Salisbury strongly agreed that they had structured recruitment compared with only 18% of employers in Playford. Playford also had a double the proportion of employers who were unsure how to respond.

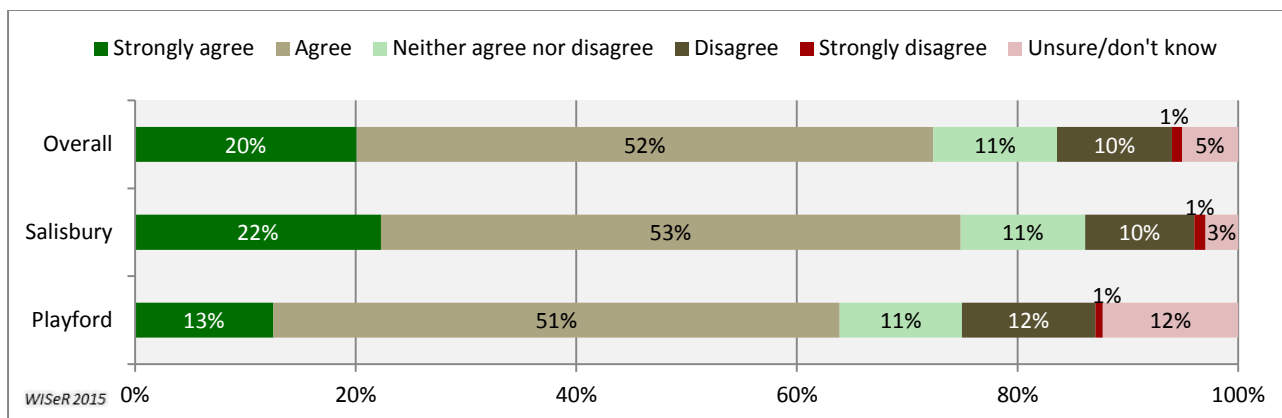
FIGURE 10: HPWP: WHEN RECRUITING, WE FIRST LIST WHAT SKILLS ARE REQUIRED AND THEN FOCUS ON THESE IN A STRUCTURED INTERVIEW



Weighted base=9,039 employers; unweighted base =387 employers.

Figure 6 illustrates employer ratings to identify employee training needs. Overall, one in five (20%) employers strongly agreed, while just over one in two (52%) agreed they have procedures in place that successfully identify employee needs. Importantly, one in ten employers disagreed that their establishments have procedures to identify training needs. Salisbury employers (22%) were almost twice as likely as Playford employers (13%) to strongly agree with the statement, but marginally less likely to disagree or strongly disagree (11% and 13%, respectively).

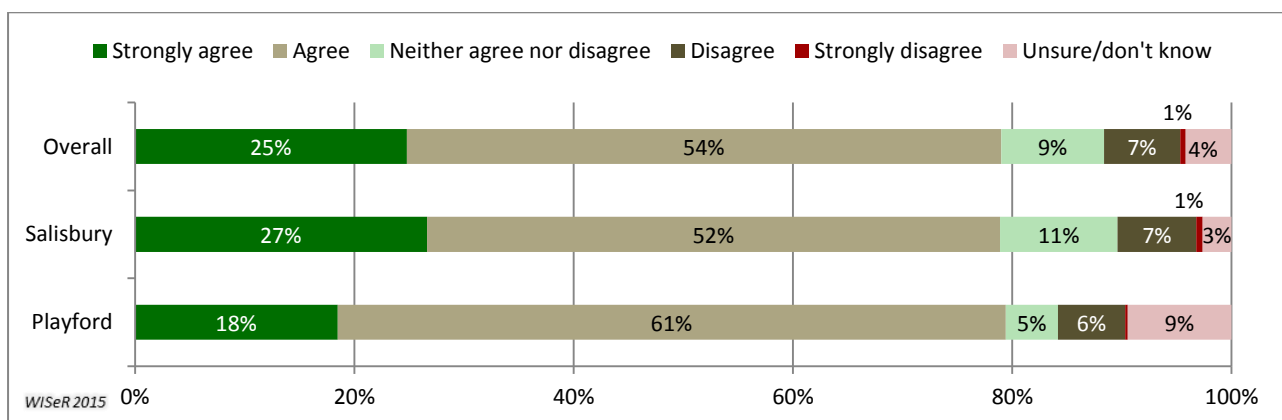
FIGURE 11: HPWP: WE HAVE PROCEDURES IN PLACE THAT SUCCESSFULLY IDENTIFY EMPLOYEE TRAINING NEEDS



Weighted base=9,039 employers; unweighted base =387 employers.

One in four employers strongly agreed that their employees receive ongoing training, while another 54% agreed (Figure 7). A total of 8% of employers disagreed (including 1% who strongly disagreed) that their staff receive ongoing training needs. While Playford employers tended to agree staff received ongoing training, fewer strongly agreed with the statement.

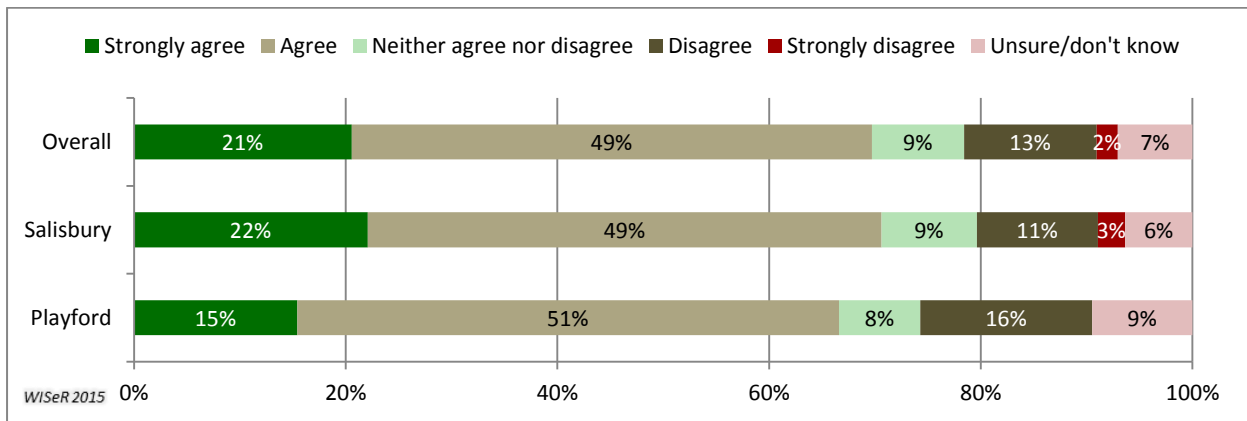
FIGURE 12: HPWP: EMPLOYEES RECEIVE ONGOING TRAINING



Weighted base=9,039 employers; unweighted base =387 employers.

The final aspect of the 'ability' component related to broadening the skill base of employees so that they become skilled in a range of different roles. Overall, 70% employers agreed or strongly agreed that they often train employees to become skilled in a range of different roles (Figure 8). A total of 15% disagreed (including 2% who strongly disagreed) that their workers are trained in this way. While Salisbury follows the overall trends, fewer employers in Playford reported broadening the skill base of employees with 15% strongly agreeing and 51% agreeing. A considerable proportion (16%) disagreed with the concept of training employees to be skilled in a variety of roles.

FIGURE 13: HPWP: WE OFTEN TRAIN EMPLOYEES TO BECOME SKILLED IN A RANGE OF DIFFERENT ROLES



Weighted base=9,039 employers; unweighted base =387 employers.

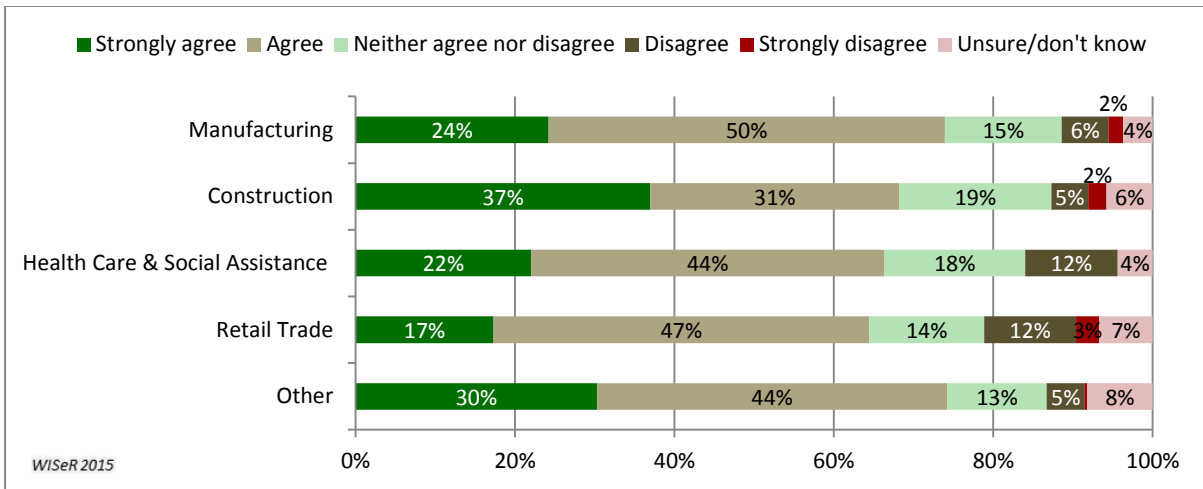
5.1.1 INDUSTRY

Businesses in the construction industry were most likely to strongly agree they implemented a structured recruitment process focusing on defined and required skills. However, manufacturing and retail organisations were more likely to support training for skill diversification.

The ‘ability’ components of the AMO model when examined by industry sector provide an insight into how they are operationalised within different industries. In most instances this will be governed by the kind of work involved within each industry as discussed in Applebaum *et al.* (2000).

As illustrated in Figure 9, 37% of employers in construction firms strongly agreed that they have a well-defined and structured skills recruitment process. This was followed by 24% in manufacturing and 22% in health care and social assistance establishments. Retail trade had the lowest proportion of employers who strongly agreed (17%), even though nearly one in two employers (47%) agreed that they had structured skills recruitment processes in place. A total of 15% of retail trade employers disagreed (including 3% that strongly disagreed) which is a reflection of the nature of this sector which tends to rely on ad hoc recruitment based on the business cycle. Surprisingly, a considerable proportion (12%) in health care and social assistance disagreed with the practice of structured skills recruitment.

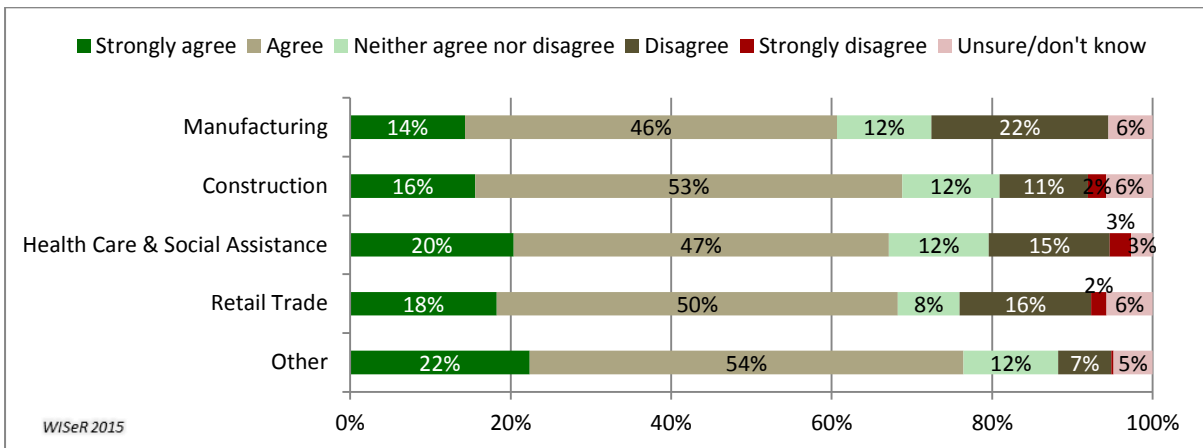
FIGURE 14: HPWP BY INDUSTRY: WHEN RECRUITING, WE FIRST LIST WHAT SKILLS ARE REQUIRED AND THEN FOCUS ON THESE IN A STRUCTURED INTERVIEW



Weighted base=9,039 employers; unweighted base =387 employers.

In terms of identifying employee training needs, manufacturing firms emerged as the lowest performing sector. Only 14% of employers in the industry agreed they have procedures in place to successfully identify employee training needs, while 46% agreed. On the other end of the scale, just over one in five manufacturing firms (22%) disagreed they have such procedures in place (Figure 10). One in five employers in health care and social assistance strongly agreed they have procedures to identify employee training needs and a further 47% agreed. However, 15% disagreed and 3% strongly disagreed, reflecting a mix of workplaces practices across the industry.

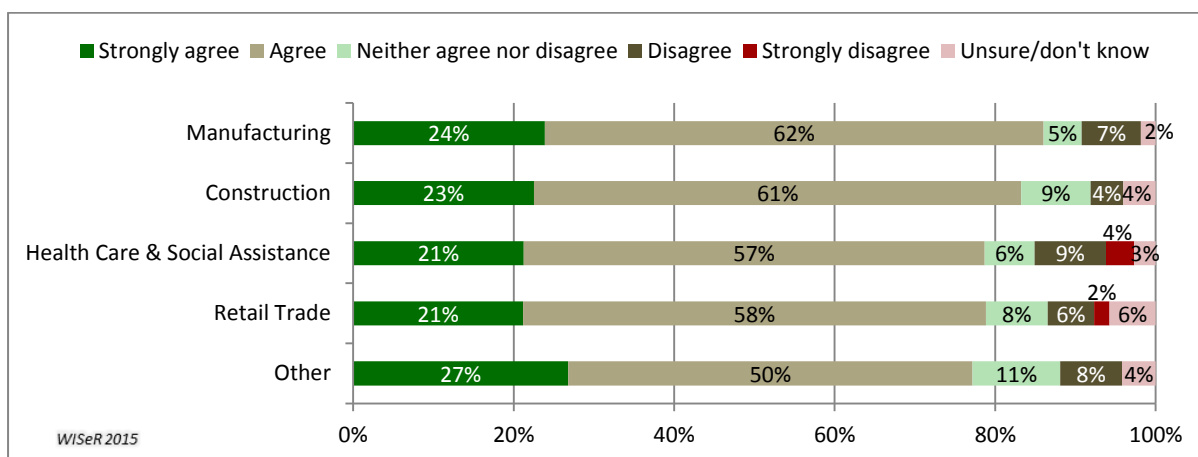
FIGURE 15: HPWP BY INDUSTRY: WE HAVE PROCEDURES IN PLACE THAT SUCCESSFULLY IDENTIFY EMPLOYEE TRAINING NEEDS



Weighted base=9,039 employers; unweighted base =387 employers.

Figure 11 further illustrates employee training by industry. Manufacturing had the most employers who reported employees receive on-going training (24% strongly agreed and 62% agreed). The construction industry followed closely with 23% strongly agreeing and 61% agreeing. Just over one in five employers in health care and social assistance and retail trade industries strongly agreed, with a further three in five employers agreeing. Nearly one in ten (9%) in health care and social assistance establishments disagreed, and another 4% strongly disagreed that their employees receive ongoing training. This proportion is slightly higher than in retail trade where 8% disagreed to some extent.

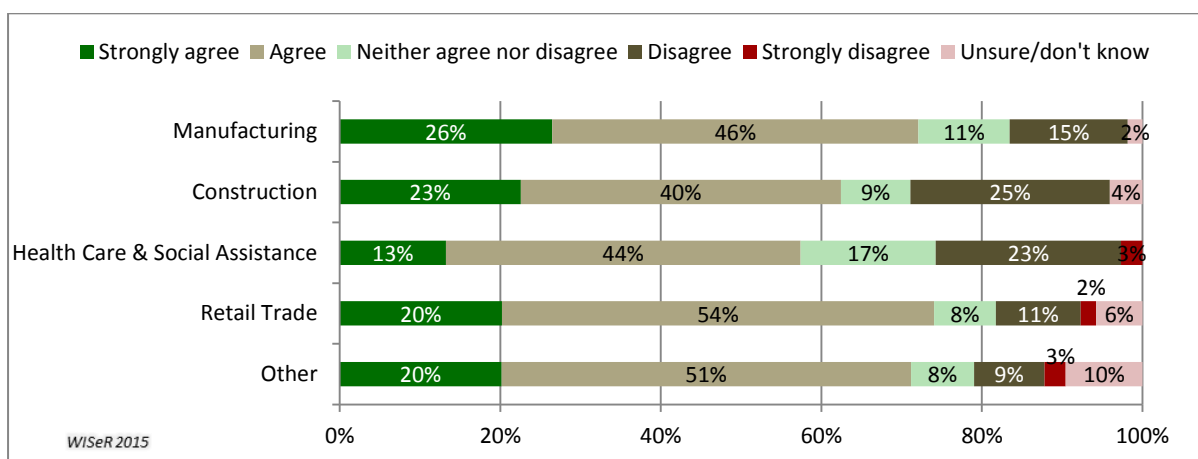
FIGURE 16: HPWP BY INDUSTRY: EMPLOYEES RECEIVE ONGOING TRAINING



Weighted base=9,039 employers; unweighted base =387 employers.

As shown in Figure 12 there is considerable variation in the extent of training for the diversification of skills across the industries. Manufacturing, construction and retail trade sectors reported increased skills training for different roles, compared to establishments in health care and social assistance. This is partly a reflection of the level and type of skills required in these industries and is consistent with Applebaum *et al.* (2000).

FIGURE 17: HPWP BY INDUSTRY: WE OFTEN TRAIN EMPLOYEES TO BECOME SKILLED IN A RANGE OF DIFFERENT ROLES



Weighted base=9,039 employers; unweighted base =387 employers.

Just over one quarter (26%) of manufacturing firms strongly agreed that they train employees to become skilled in a range of different roles, with a further 46% agreeing and 15% disagreeing. In the construction industry, 23% of employers strongly agreed their employees were trained in a range of roles, with 40% agreeing. However, one in four construction firms in Playford and Salisbury disagreed that this was their approach. Approximately three in four (74%) employers in retail trade strongly agreed or agreed that they often train their staff in a range of roles, while 13% disagreed.

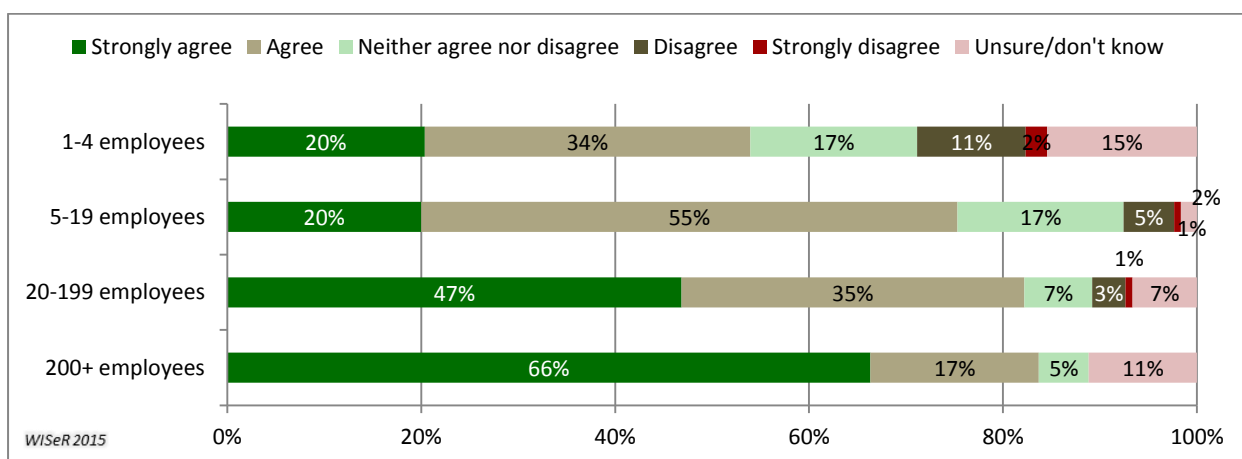
Only 13% of employers in health care and social assistance strongly agreed they train employees to be skilled across a range of roles, with a further 44% agreeing. More than one in four (26%) disagreed with this statement to some extent, reflecting the higher level of division of labour and skill specialisation within the healthcare industry.

5.1.2 ESTABLISHMENT SIZE

Recruitment practices appear to vary by the size of the establishment, with larger businesses more likely to use a structured approach to interviewing, and identify employee training needs. Ongoing training was more readily available in businesses with five or more employees, while enterprises of all sizes were equally inclined to support skill development in a range of roles.

Recruitment practices appear to vary by establishment size (see Figure 13), with larger businesses utilising a structured approach more than the smaller firms¹⁵. Fifty-four percent of the smallest establishments (with 1 to 4 employees) strongly agreed or agreed that they have a structured skills recruitment process, with a further 13% disagreeing to some extent. A considerable proportion (15%) of these small establishments did not know or were unsure of the recruitment process within the organisation. Among the establishments with 5 to 19 employees, 75% reported having a structured recruitment process, which includes 20% that strongly agreed. Only 6% disagreed or strongly disagreed. Nearly one in two (47%) of medium to large establishments (with 20 to 199 employees) strongly agreed with having a structured recruitment process, while a further 35% agreed and 4% either disagreed or strongly disagreed.

FIGURE 18: HPWP BY FIRM SIZE: WHEN RECRUITING, WE FIRST LIST WHAT SKILLS ARE REQUIRED AND THEN FOCUS ON THESE IN A STRUCTURED INTERVIEW

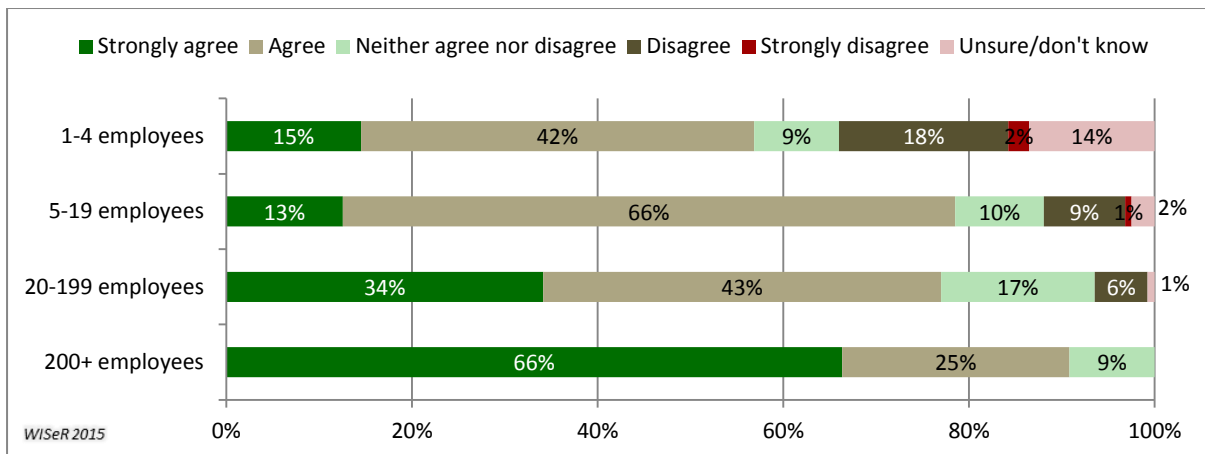


Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

The incidence of procedures to identify employee training needs also follow a similar pattern - increasing with firm size (Figure 14). Fifteen percent of firms with one to four employees strongly agreed they have procedures in place that successfully identify employees training needs, another 42% agreed. One in five of these small employers either disagreed (18%) or strongly disagreed (2%) with this measure and 14% were unsure or did not know. Among firms with 5 to 19 employees, one in five either strongly agreed (13%) or agreed (66%) they have measures to successfully identify employee training needs, whereas one in ten employees disagreed (10%) to some extent. Larger firms are more inclined to strongly agree they are successful in identifying employee training needs. Just over one in three establishments (34%) with 20 to 199 employees strongly agreed and a further 43% agreed that they have procedures to identify training needs of their staff.

¹⁵ The figures for large firms with 200 or more employees should be interpreted with caution due to the small sample size (n=8), they are presented for the sake of completeness.

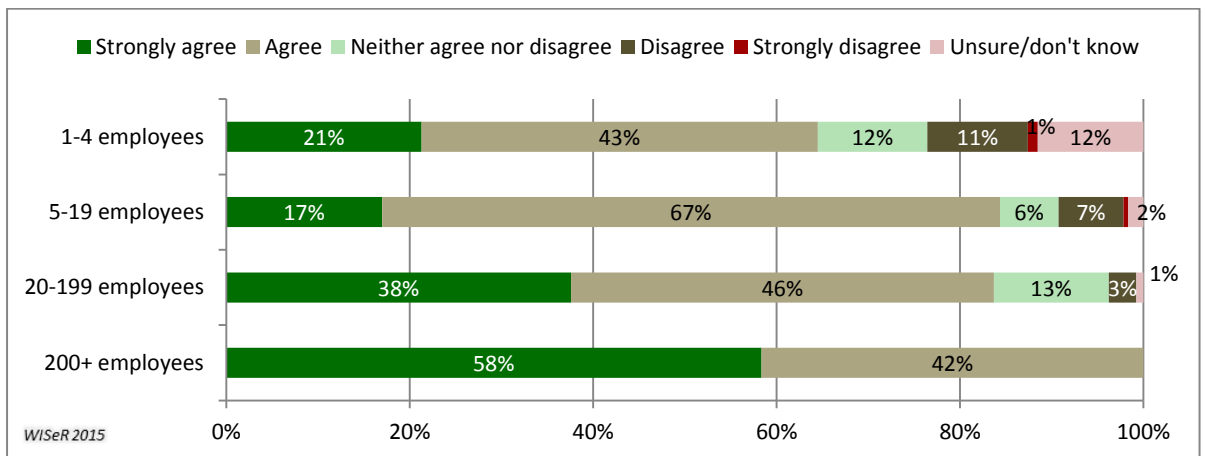
FIGURE 19: HPWP BY FIRM SIZE: WE HAVE PROCEDURES IN PLACE THAT SUCCESSFULLY IDENTIFY EMPLOYEE TRAINING NEEDS



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

Smaller firms appear to provide fewer ongoing training opportunities for their employees compared to larger firms (Figure 15). One in five (21%) establishments with one to four employees strongly agreed, and another 43% agreed that their employees receive ongoing training. Just over one in ten small businesses disagreed (11%) or strongly disagreed (1%). Of the establishments with 5 to 19 employees, 17% strongly agreed, and 67% agreed. Thirty-eight percent of organisations with 20 to 199 employees strongly agreed and 46% agreed with only 3% disagreeing that ongoing training was provided.

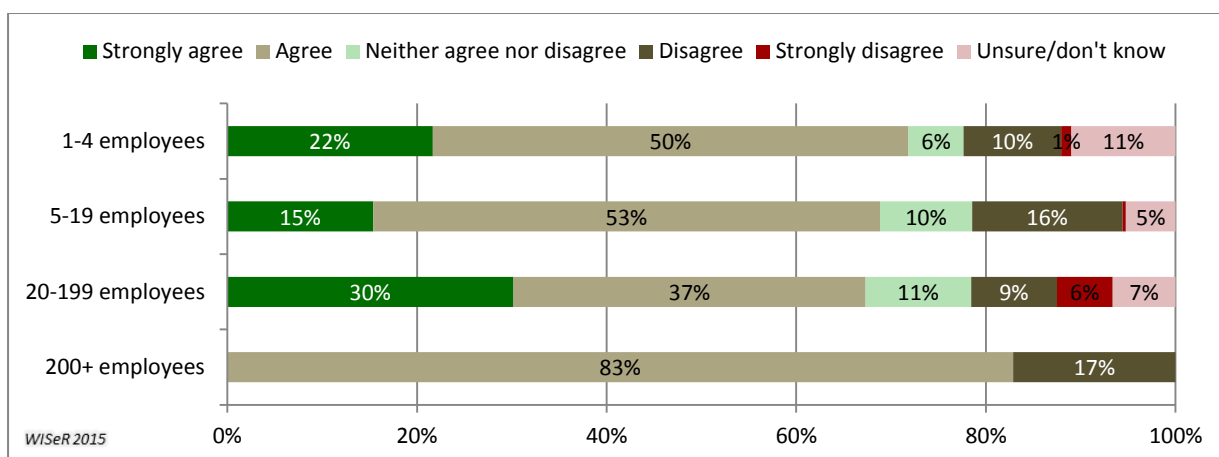
FIGURE 20: HPWP BY FIRM SIZE: EMPLOYEES RECEIVE ONGOING TRAINING



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

Almost three-quarters of establishments agreed to some extent they train staff in a range of different roles (see Figure 16). However, larger firms (20 to 199 employees) were more likely to strongly agree.

FIGURE 21: HPWP BY FIRM SIZE: WE OFTEN TRAIN EMPLOYEES TO BECOME SKILLED IN A RANGE OF DIFFERENT ROLES



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

5.2 MOTIVATION

The second dimension of the AMO model is ‘motivation’, which emphasises the need for employee motivation that drives discretionary effort. Motivation has been categorised into three forms: extrinsic/financial; intrinsic; and mutual trust/employees as stakeholders (Appelbaum *et al.*, 2000). Extrinsic factors include a range of incentive pay schemes, such as employee share-ownership programs, individual performance pay or commission and group-based performance pay. Intrinsic motivation is linked to the extent to which employees find a job satisfying and enjoyable to do. Finally, firms can encourage motivation by creating an atmosphere of trust and encouraging employees to think of themselves as stakeholders in the firm. The performance benefits of motivated staff include increased employee retention and lower absenteeism.

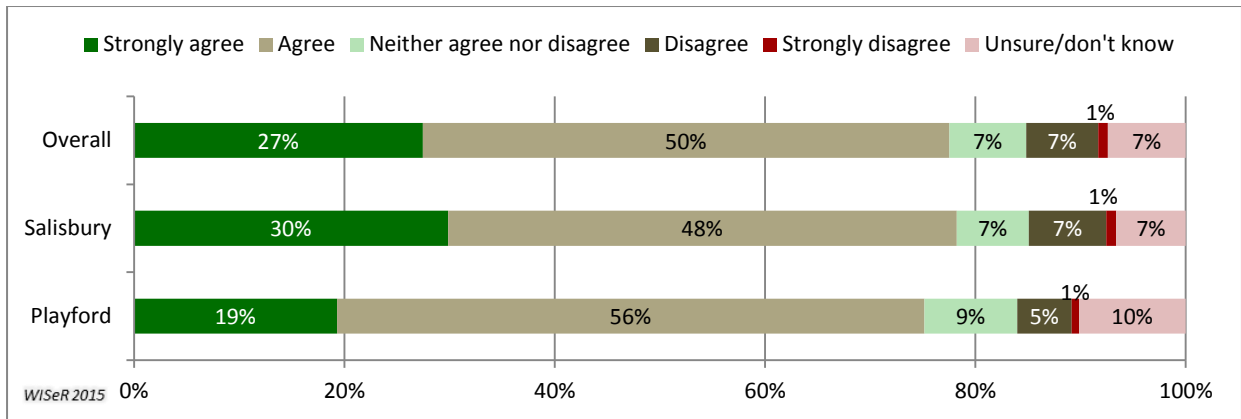
Motivation is captured in the WFS using the following questions which are analysed by city, industry group and establishment size:

- ✓ We strive to identify good performance and reward individuals accordingly.
- ✓ We try to make employees feel secure in their jobs.
- ✓ There is a clear path for employees to develop within this organisation.

Almost all employers indicated they tried to ensure their employees felt secure in their jobs, while more than three-quarters attempted to identify and appropriately reward good performance. However, only two-thirds indicated there was a clear path for employees to develop within the organisation. These patterns were relatively consistent in both Salisbury and Playford. However, Playford enterprises had a tendency to be less sure about their responses.

Identifying and rewarding good performance by employees is a key feature of motivational activity which contributes to a high performance workplace. As illustrated in Figure 17, 27% of employers strongly agreed, with another 50% agreeing that they follow this practice. A total of 8% disagreed, including 1% strongly disagreeing that they identify and reward employee performance. Salisbury had a higher proportion of firms that strongly agreed (30%) compared to Playford (19%). However, the proportion of employers agreeing with the statement to some extent was similar.

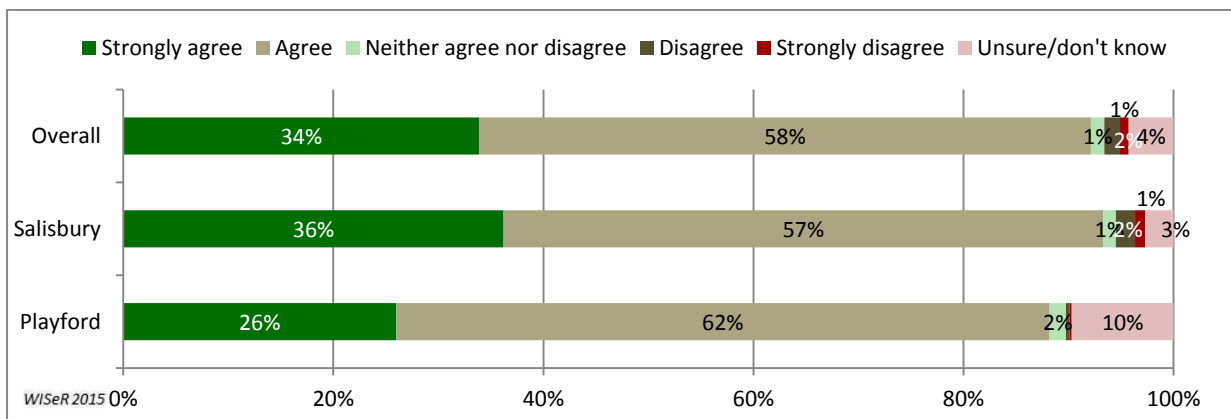
FIGURE 22: HPWP: WE STRIVE TO IDENTIFY GOOD PERFORMANCE AND REWARD INDIVIDUALS ACCORDINGLY



Weighted base=9,039 employers; unweighted base =387 employers.

The second aspect of motivation relates to providing an environment where employees feel secure in their job. Almost all enterprises reported they attempted to support the feeling of job security for their employees (34% reporting strong agreement with the statement and 58% agreement; see Figure 18). Very few (4%) were ambivalent or disagreed. Although there were similar agreement in both cities, employers in Playford were less likely to strongly agree than those in Salisbury.

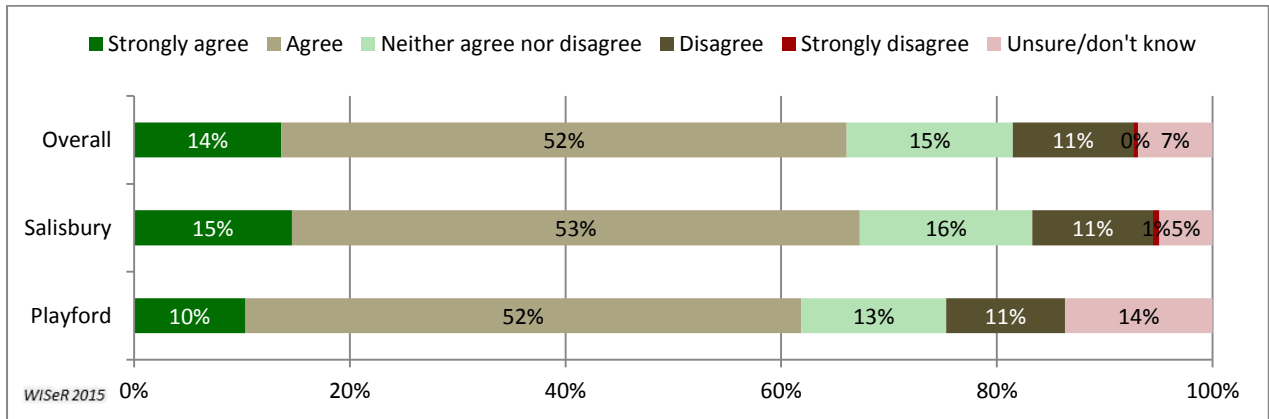
FIGURE 23: HPWP: WE TRY TO MAKE EMPLOYEES FEEL SECURE IN THEIR JOBS



Weighted base=9,039 employers; unweighted base =387 employers.

Staff development within an organisation is also linked to employee motivation. Overall 14% of establishments strongly agreed that they provide a clear path for employee development with a further 52% agreeing (Figure 19). Just over one in ten (11%) disagreed that this was provided. In Playford, only one in ten employers strongly agreed that there is a clear path for their employees to develop within their organisation. A considerable proportion (14%) did not know or were unsure while 11% disagreed this pathway was in place.

FIGURE 24: HPWP: THERE IS A CLEAR PATH FOR EMPLOYEES TO DEVELOP WITHIN THIS ORGANISATION



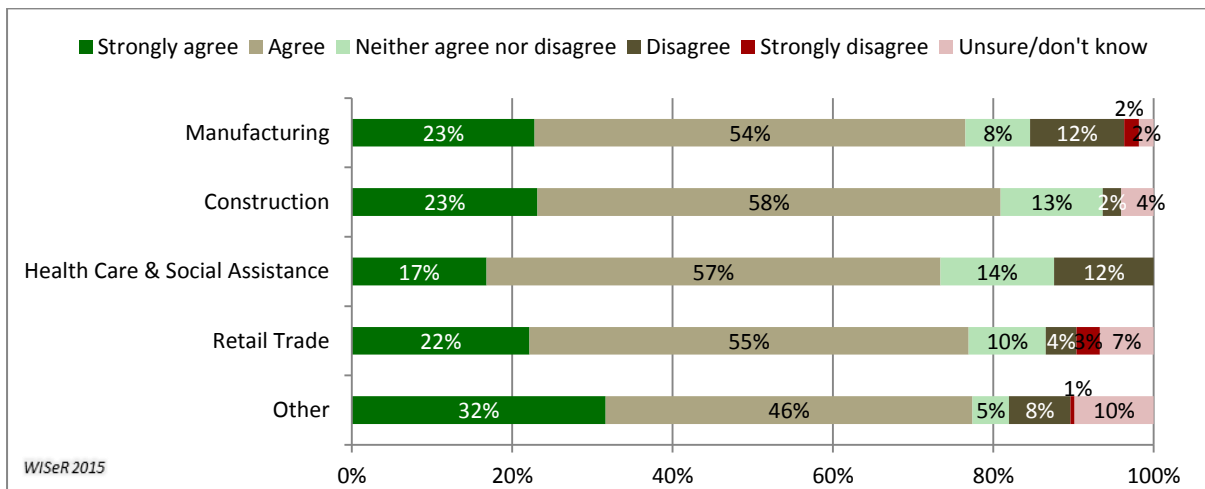
Weighted base=9,039 employers; unweighted base =387 employers.

5.2.1 INDUSTRY

Almost all manufacturing, construction and health care and social assistance establishments agreed they tried to make employees feel secure in their jobs. More than four in five retail traders indicated the same. Health care and social assistance organisations were slightly less likely than the other enterprises to strive to identify and reward good performance, despite almost three-quarters indicating this was the case. Businesses in construction were more likely to agree there were clear pathways for development within their organisation.

This section provides an analysis of the three aspects of motivation as described in the AMO model by industry group. Figure 20 illustrates employer ratings identifying and rewarding good performance. Health care and social assistance had the lowest proportion (17%) of employers who strongly agreed with this practice, compared to manufacturing (23%), construction (23%) and retail trade (22%). Slightly over one in two employers across all industries agreed with the statement, with construction having the highest proportion at 58%. Just over one in ten employers (12%) in manufacturing and in health care and social assistance disagreed their organisation identified and rewarded good performance.

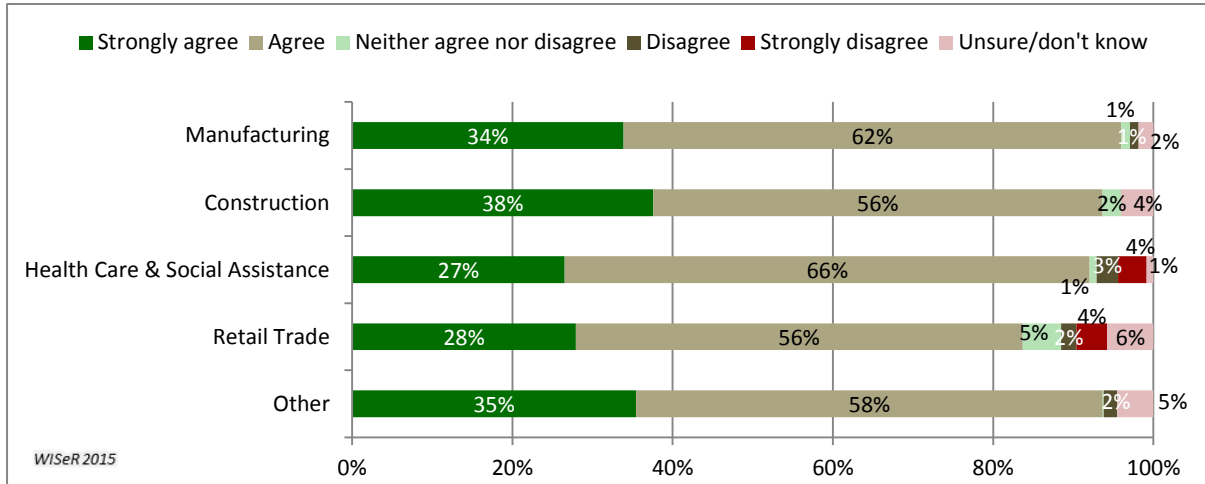
FIGURE 25: HPWP BY INDUSTRY: WE STRIVE TO IDENTIFY GOOD PERFORMANCE AND REWARD INDIVIDUALS ACCORDINGLY



Weighted base=9,039 employers; unweighted base =387 employers.

Almost all employers across all industry groups reported that they tried to make employees feel secure in their jobs (Figure 21). Correspondingly, disagreement was rare in manufacturing and construction, but occurred in 7% of health care and social assistance organisations and 6% of retail traders.

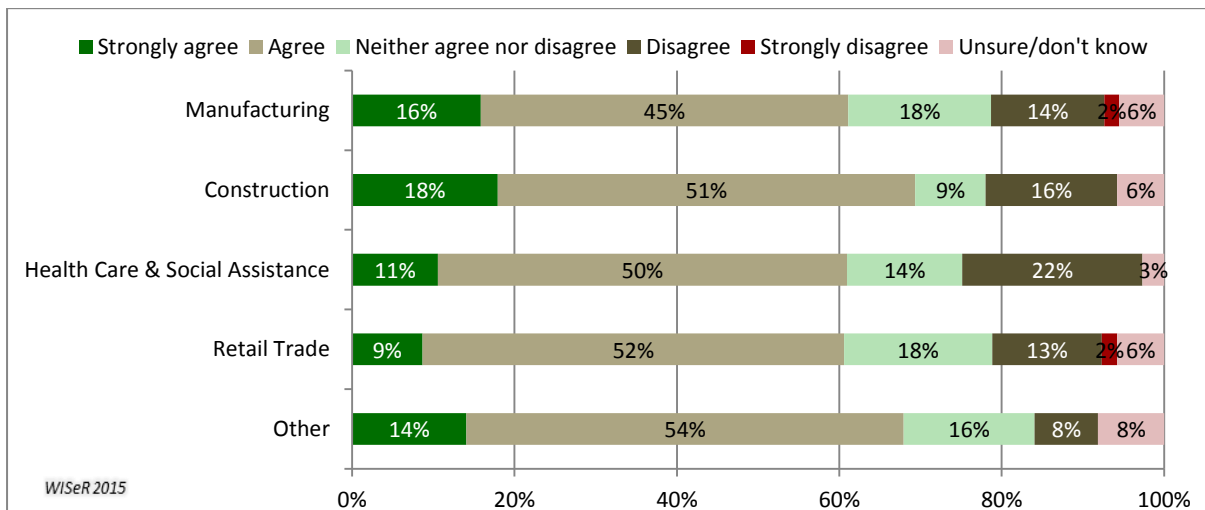
FIGURE 26: HPWP BY INDUSTRY: WE TRY TO MAKE EMPLOYEES FEEL SECURE IN THEIR JOBS



Weighted base=9,039 employers; unweighted base =387 employers.

More than two-thirds (69%) of employers in the construction industry agreed they had clear pathways for development within their organisation (with 18% strongly agreeing and 51% agreeing; see Figure 22); followed by 61% of manufacturers. Just over one in ten (11%) in health care and social assistance sector strongly agreed that they have a clear path for employees to develop with their organisations, while a further 50% agreed. In retail trade, just under one in ten (9%) strongly agreed, with a further 52% agreeing.

FIGURE 27: HPWP BY INDUSTRY: THERE IS A CLEAR PATH FOR EMPLOYEES TO DEVELOP WITHIN THIS ORGANISATION



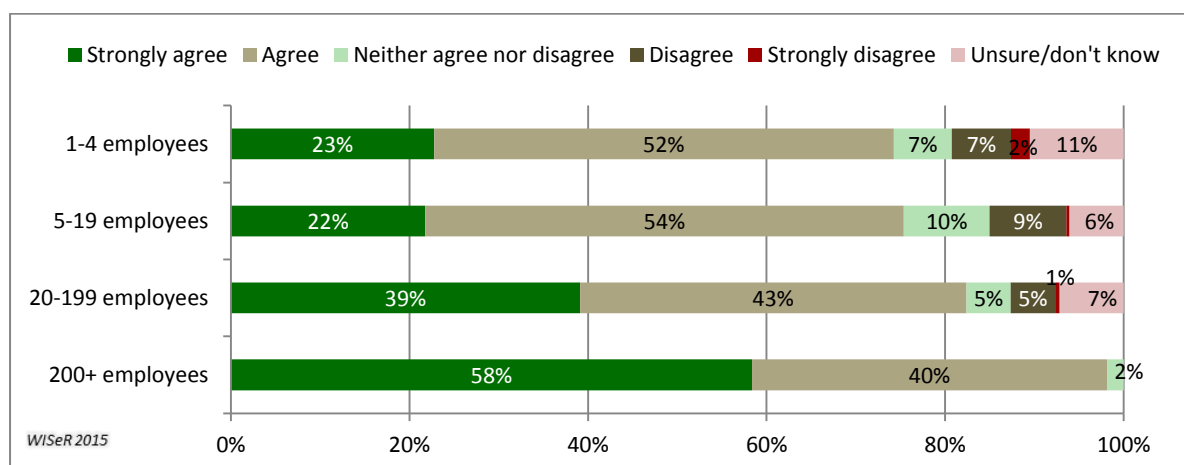
Weighted base=9,039 employers; unweighted base =387 employers.

5.2.2 ESTABLISHMENT SIZE

Smaller establishments (of less than 19 employees) were less likely to strongly agree that they identified and rewarded good performance. Whereas the smallest establishment (1 to 4 employees) were more likely to be unsure about their ability to identify and reward good performance or about whether there was a clear pathway for development within their organisation.

Figure 23 presents how different sized firms identify and reward employee performance. Smaller firms with one to four or five to nineteen employees were equally likely to indicate they strived to identify good performance and provide appropriate rewards. Larger firms (2 to 199 employees) were more likely to strongly endorse the statement, around two in five (39%) strongly agreed while 43% agreed.

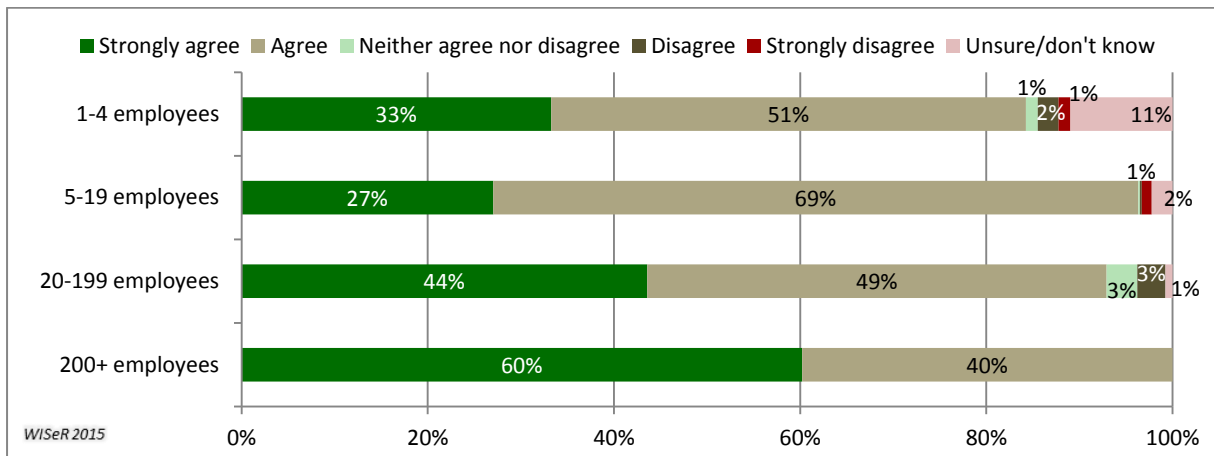
FIGURE 28: HPWP BY ESTABLISHMENT SIZE: WE STRIVE TO IDENTIFY GOOD PERFORMANCE AND REWARD INDIVIDUALS ACCORDINGLY



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

Most firms agreed they try to make employees feel secure in their jobs (Figure 24). One third of the smallest firms (1 to 4 employees) strongly agreed, while a further 51% agreed. Only 3% disagreed, including 1% that strongly disagreed. However, just over one in ten (11%) of these firms reported that they were either unsure or did not know of the practice within their establishment. Of the firms with five to nineteen employees, 27% strongly agreed and 69% agreed. Forty-four percent of medium to large firms (20 to 199 employees) agreed that they try to make employees feel secure in their jobs while 49% agreed and 3% disagreed.

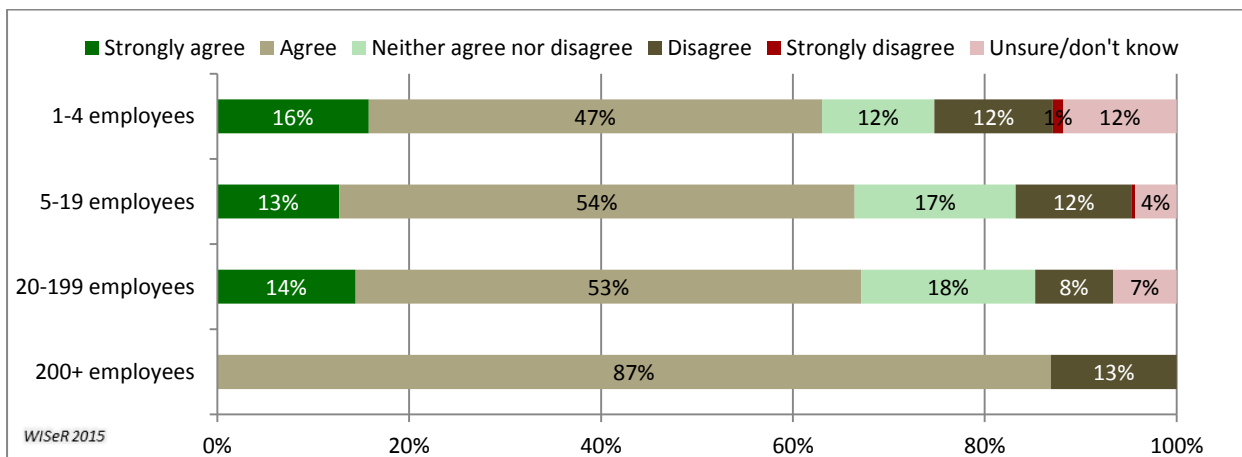
FIGURE 29: HPWP BY ESTABLISHMENT SIZE: WE TRY TO MAKE EMPLOYEES FEEL SECURE IN THEIR JOBS



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

In terms of providing a clear path for employees to develop within the organisation, the distribution of responses was broadly similar. Around two-thirds of enterprises agreed to some extent (Figure 25). Small establishments (1 to 4 employees) are more likely to have difficulties ensuring a clear pathway, which may be reflected in responses indicating they were unsure or didn't know of a pathway for development within the organisation.

FIGURE 30: HPWP BY ESTABLISHMENT SIZE: THERE IS A CLEAR PATH FOR EMPLOYEES TO DEVELOP WITHIN THIS ORGANISATION



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

5.3 OPPORTUNITY

The 'opportunity' to be involved in the decision-making processes in an organisation gives employees a sense of involvement, engagement and enhances well-being (Appelbaum *et al.*, 2000). According to Wood and Wall (2007), Boxall and Macky (2009) and Appelbaum *et al.*, (2000), opportunity is the distinguishing feature that differentiates HPWP whereby the decision making process should be decentralised and shared rather than being controlled through a hierarchy. Wood and Wall (2007), further indicate there are different ways in which employees should be given an opportunity to be involved either through being in a self-managed team or for their voice to be heard.

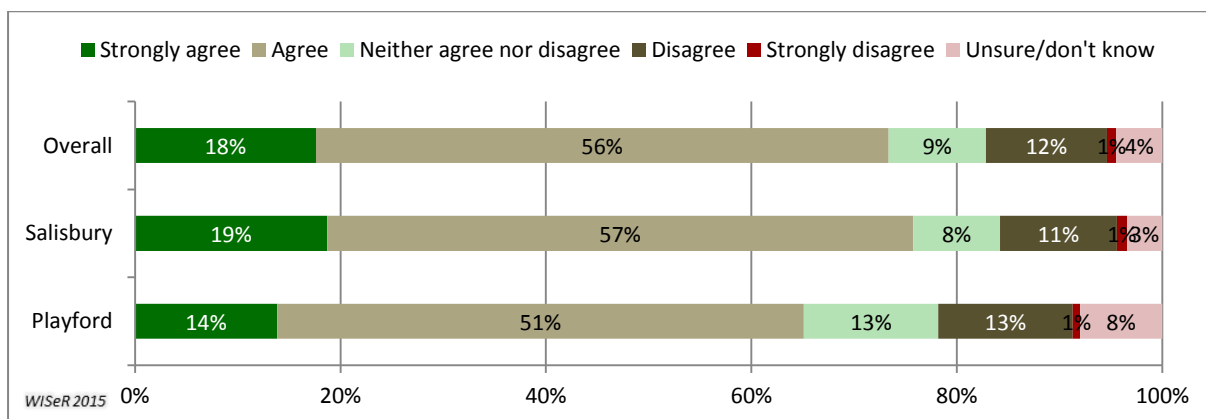
The following three questions were used in the HPWP module of the WFS to capture the opportunity component of the AMO model:

- ✓ We have formal processes for employees to make suggestions about how things can be improved.
- ✓ There are regular meetings between employees and managers (at least once in two weeks).
- ✓ Management frequently communicates wider business goals and decisions to employees.

Around 70% to 75% of organisations agreed they provide opportunities for employees to meet with managers to receive information about business goals and decisions and to make suggestions. However, enterprises in Playford were less inclined to agree that these opportunities were in place.

Figure 26 captures the first aspect of ‘opportunity’ which relates to employee involvement in improving the overall performance of a firm - an important factor in enhancing empowerment and ownership among employees. Overall 18% of firms strongly agreed while another 56% agreed they have formal procedures for employees to make suggestions about improvements. Playford had relatively fewer firms with formal processes for employees to suggest improvements, with only 14% strongly agreeing and 51% agreeing. Thirteen percent of the firms remained neutral not agreeing or disagreeing, while a further 13% disagreed and 8% were unsure or did not know.

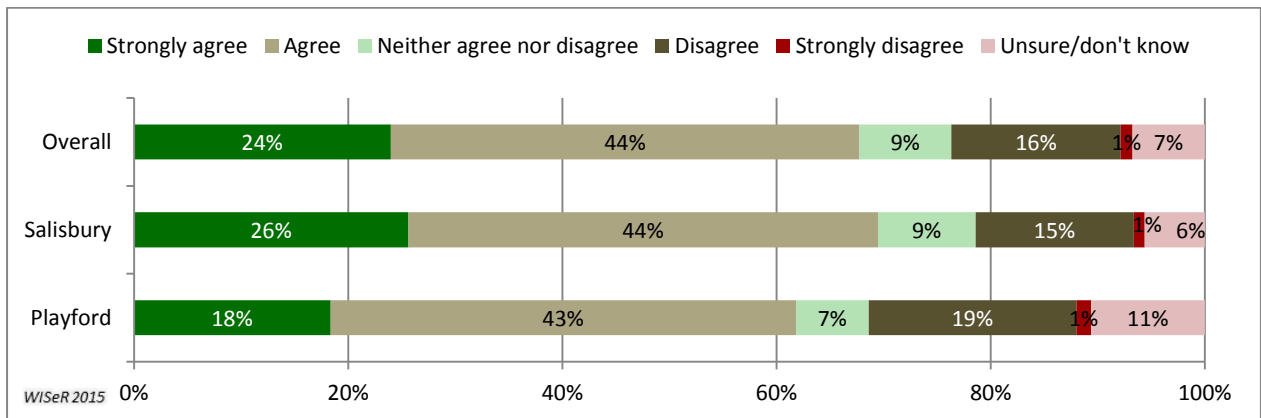
FIGURE 31: HPWP: WE HAVE FORMAL PROCESSES FOR EMPLOYEES TO MAKE SUGGESTIONS ABOUT HOW THINGS CAN BE IMPROVED



Weighted base=9,039 employers; unweighted base =387 employers.

Overall, around one in four firms strongly agreed they have regular meetings between employees and managers, while a further 44% agreed (Figure 27). A significant proportion (17%) disagreed or strongly disagreed, while a further 7% were unsure or did not know about the practice of regular meetings. Playford establishments were less likely than Salisbury to strongly agree with the statement.

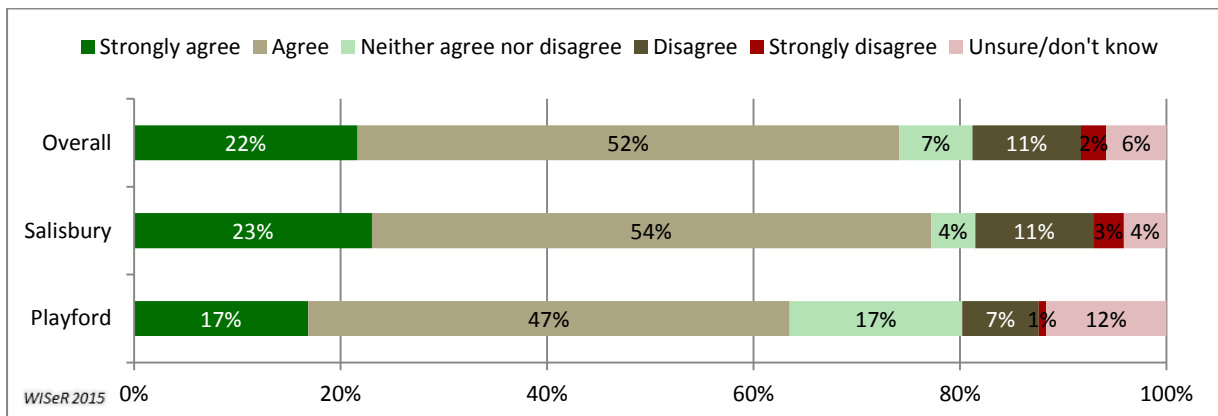
FIGURE 32: HPWP: THERE ARE REGULAR MEETINGS BETWEEN EMPLOYEES AND MANAGERS



Weighted base=9,039 employers; unweighted base =387 employers.

Figure 28 presents employer ratings of the extent to which wider business goals and decisions are communicated to the employees. Just over one in five (22%) firms strongly agreed that they frequently communicate business goals and decisions to their staff, while a further 52% agreed. Thirteen percent of establishments disagreed that this practice was implemented. Just under two-thirds of Playford establishments agreed to some extent, while 30% were either ambivalent or unsure about whether this level of communication occurred.

FIGURE 33: HPWP: MANAGEMENT FREQUENTLY COMMUNICATES WIDER BUSINESS GOALS AND DECISIONS TO EMPLOYEES



Weighted base=9,039 employers; unweighted base =387 employers.

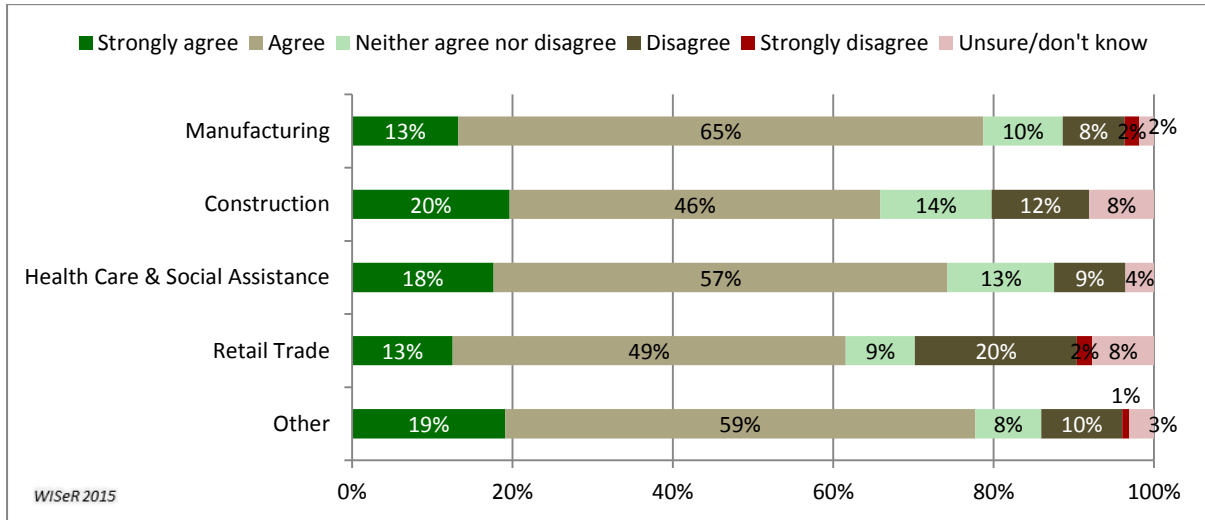
5.3.1 INDUSTRY

Manufacturing firms were most likely to agree that opportunities to participate in meetings and provide improvement suggestions were available. Approaching 80% of manufacturing and health care and social assistance establishments also provided routine information on business goals and decisions to employees. However, only half the health care and social assistance establishments reported regular meetings. Around 10% of establishments in construction and retail trade were unsure or did not know about their processes to support opportunities for this sort of two-way communication.

Manufacturing firms were most likely to agree they have formal processes for employees to suggest improvements within the organisations (see Figure 29). Three-quarters of health care and social assistance organisations also reported these formal processes. However, processes for employees to make improvement suggestions were less common

in construction and retail trade, with the later having almost one-quarter of establishments disagreeing with the statement.

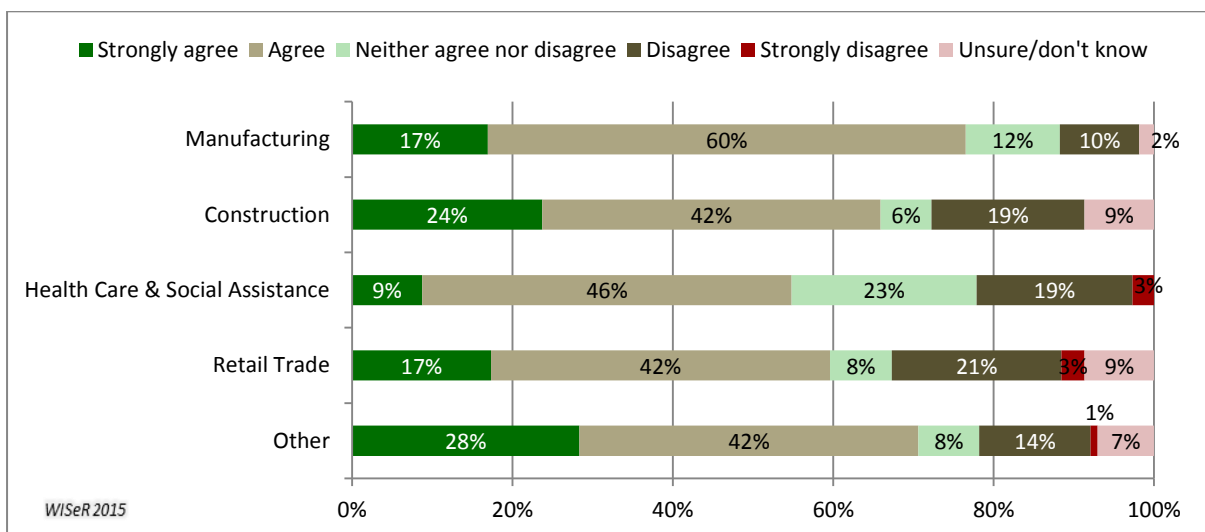
FIGURE 34: HPWP BY INDUSTRY: WE HAVE FORMAL PROCESSES FOR EMPLOYEES TO MAKE SUGGESTIONS ABOUT HOW THINGS CAN BE IMPROVED



Weighted base=9,039 employers; unweighted base =387 employers.

Regular meetings between employees and managers are considered an essential tool in the AMO model of HPWP. As illustrated in Figure 30, this practice varied considerably by industry group. In the manufacturing sector, 17% of the firms strongly agreed, 60% agreed and 10% disagreed. The construction sector had the highest share of firms that strongly agreed they had regular employee-manager meetings (24%), with a further 42% agreeing with the statement. Few (9%) health care and social assistance organisations strongly agreed (9%) with an additional 46% agreeing. It is notable that around one in five construction, retail trade and health care and social assistance enterprises disagreed they had employer-manager meetings, the highest and most consistent level of disagreement with a statement.

FIGURE 35: HPWP BY INDUSTRY: THERE ARE REGULAR MEETINGS BETWEEN EMPLOYEES AND MANAGERS

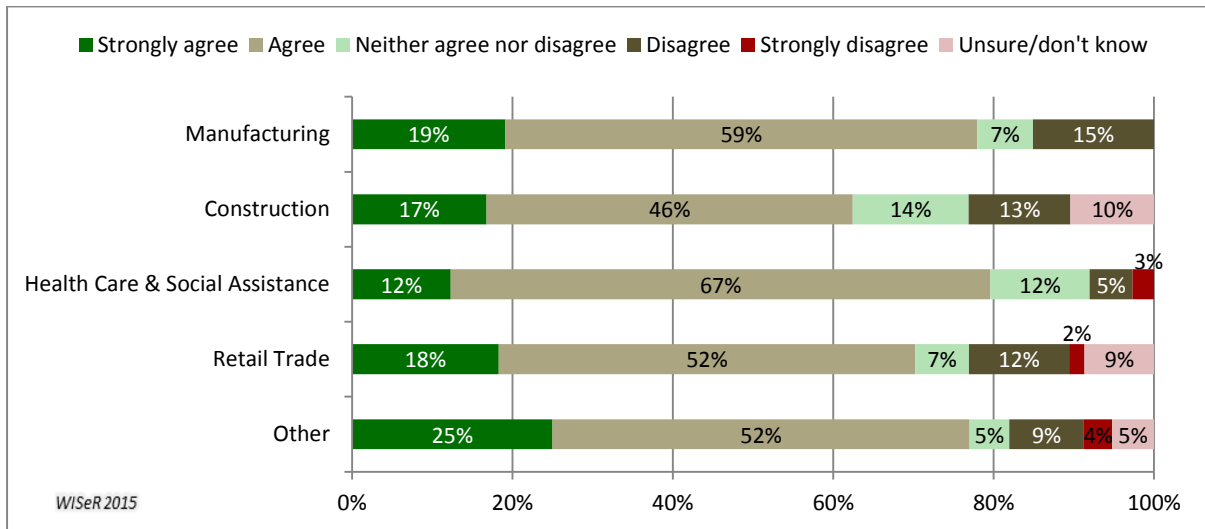


Weighted base=9,039 employers; unweighted base =387 employers.

The third aspect of opportunity is illustrated in Figure 31 where 19% of manufacturing firms strongly agreed that management frequently communicates business goals and

decisions to their employees. A further 59% agreed while 15% disagreed. Although almost four in five (79%) health care and social assistance organisations agreed to some extent that management communicated goals and decisions frequently, there were fewer organisations that strongly agreed with the statement. Enterprises in the retail trade and construction were least likely to endorse this statement, with only three in five construction organisations agreeing or strongly agreeing with the statement

FIGURE 36: HPWP BY INDUSTRY: MANAGEMENT FREQUENTLY COMMUNICATES WIDER BUSINESS GOALS AND DECISIONS TO EMPLOYEES



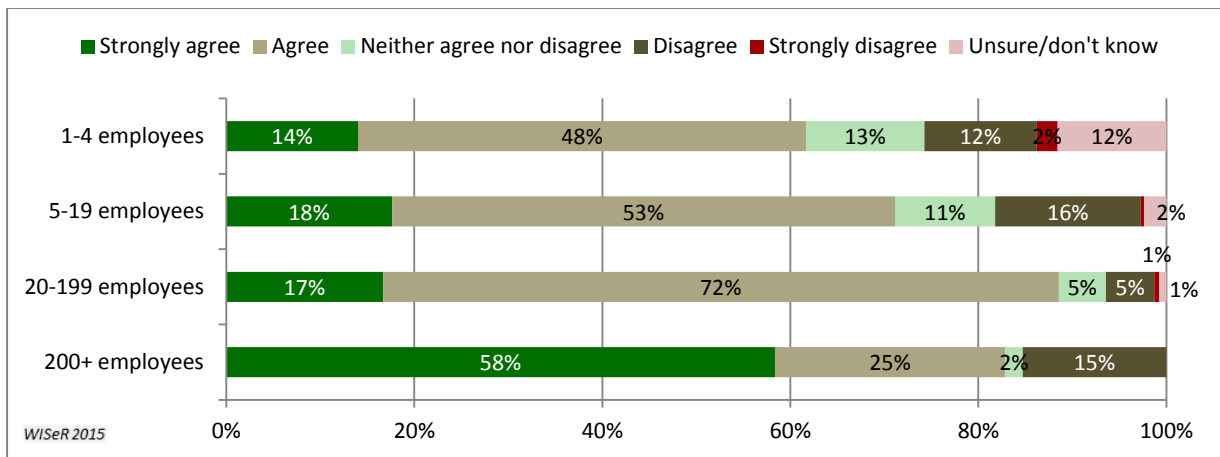
Weighted base=9,039 employers; unweighted base =387 employers.

5.3.2 ESTABLISHMENT SIZE

There was a strong trend for larger establishments to have formal processes for employees to make improvement suggestions, increasing from 62% for small (1 to 4 employees) establishments to 89% for organisations with 20 to 199 employees. However, this trend was reversed with regard to the provision of regular meetings, which was more common among small establishments.

As evident from Figure 32, the extent to which formal processes to engage employees within the organisation depends on the size of the establishment. The distribution suggests that smaller firms are less likely to have formal processes in place to incorporate employee suggestions, as compared to the larger ones. Small establishments with 1 to 4 employees were less likely to strongly agree (14%) or agree (48%) that formal processes for improvement suggestions were in place, whereas almost 90% of large establishments (20 to 199 employees) reported having these processes in place.

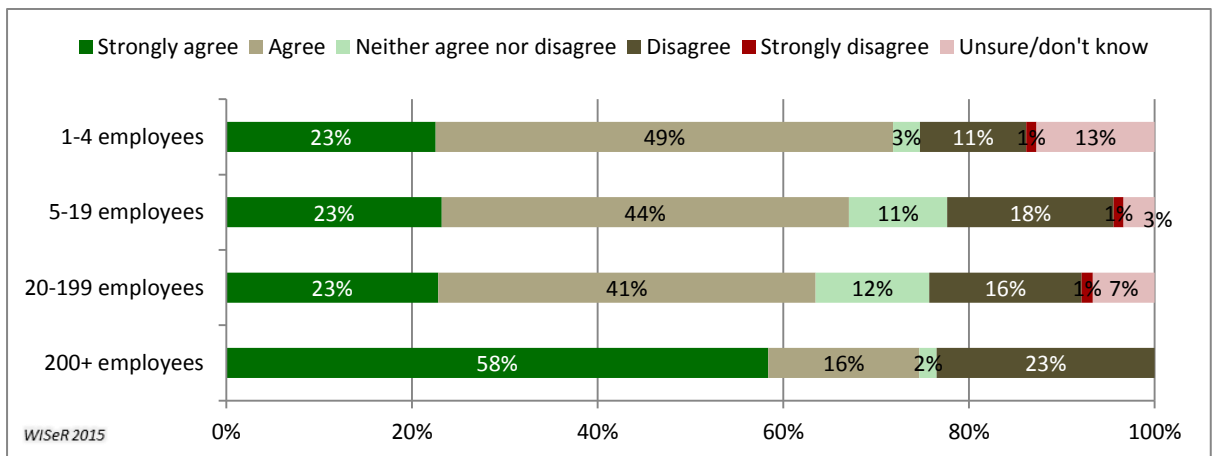
FIGURE 37: HPWP BY ESTABLISHMENT SIZE: WE HAVE FORMAL PROCESSES FOR EMPLOYEES TO MAKE SUGGESTIONS ABOUT HOW THINGS CAN BE IMPROVED



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

Regular meetings between employees and managers are a key factor that operates via the channel of ‘opportunity’ in the AMO model. Just under one in four (23%) firms with less than 200 employees strongly agreed they have regular meetings of this kind (Figure 33). However, almost one in five larger employers (with 5 to 199 employees) disagreed that employee-manager meetings were held. A significant share (13%) of small establishments also reported that they were either unsure of did not know of this practice within their organisations.

FIGURE 38: HPWP BY ESTABLISHMENT SIZE: THERE ARE REGULAR MEETINGS BETWEEN EMPLOYEES AND MANAGERS

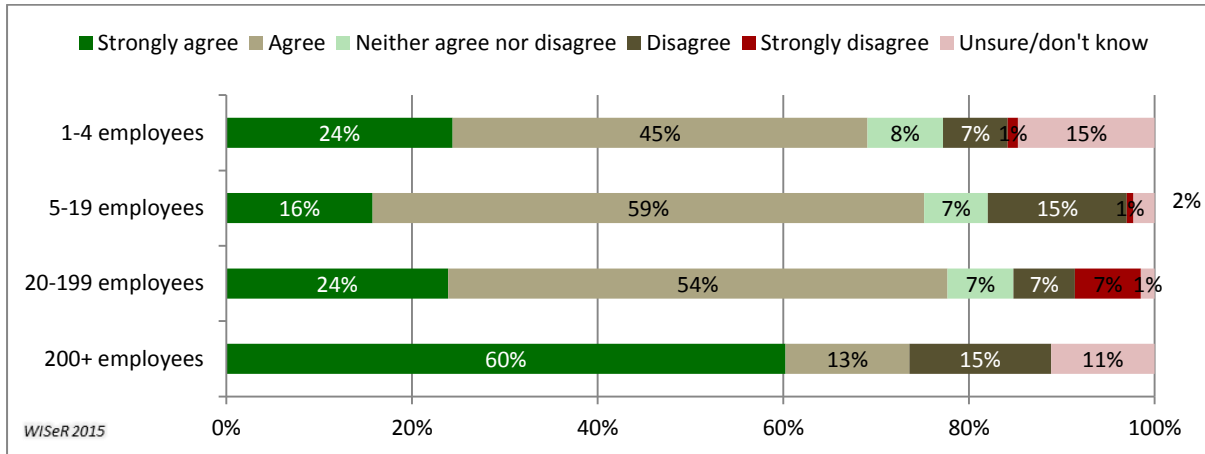


Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

The third factor in cultivating opportunity in the AMO model is the extent to which management communicates wider business goals and decisions, thereby maintaining employee engagement within the organisation. One in four (24%) of the larger firms (20 to 199 employees) strongly agreed, and another 54% agreed they regularly communicate wider business goals to their employees (Figure 34). Marginally fewer enterprises with five to nineteen employees agreed goals and decisions were frequently communicated to employees. Almost one quarter (24%) of small establishments (1 to 4 employees) strongly agreed that they regularly communicated wider business goals to their employees, with

an additional 45% agreeing they engaged in this practice. Again, a relatively large (15%) proportion of small establishments was unsure or didn't know how to respond to this statement.

FIGURE 39: HPWP BY ESTABLISHMENT SIZE: MANAGEMENT FREQUENTLY COMMUNICATES WIDER BUSINESS GOALS AND DECISIONS TO EMPLOYEES



Weighted base=9,021 employers; unweighted base =364 employers.
 Estimates for establishments with 200 or more employees should be interpreted with caution as the sample size for this category was very small (n=8).

6 ORGANISATIONAL PERFORMANCE

ORGANISATIONAL PERFORMANCE FACTORS

In all three waves of the WFS, employers rated a range of organisational factors that could affect their performance on a five-point scale (ranging from 1 - strongly disagree to 5 - strongly agree). Employer ratings of organisational performance factors in November 2014, May 2014 and November 2013 are presented in Figure 35, Figure 36 and Figure 37 respectively¹⁶. For clarity of presentation, unsure or not applicable responses (up to 3% in Wave 3 and 4% in Waves 1 and 2) are not included in the figures, but are presented in the data tables in Appendix B.

The top four factors affecting organisational performance have remained largely consistent across the three waves of the WFS (see Table 1), indicating that employers continue to face similar concerns in the period between November 2013 and November 2014. While there is some variation in ranked order, the top concerns were tax burden, competition in the marketplace, customer demand and skill shortage. The most critical issue in all three waves of the survey was tax burden, increasing from 48% in November 2013 to 55% of organisations in November 2014. In addition, around two in five employers expressed concern in November 2014 in the areas of customer demand, competition in the market place and skill shortages.

TABLE 1: TOP FOUR RANKED FACTORS AFFECTING PERFORMANCE, NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014

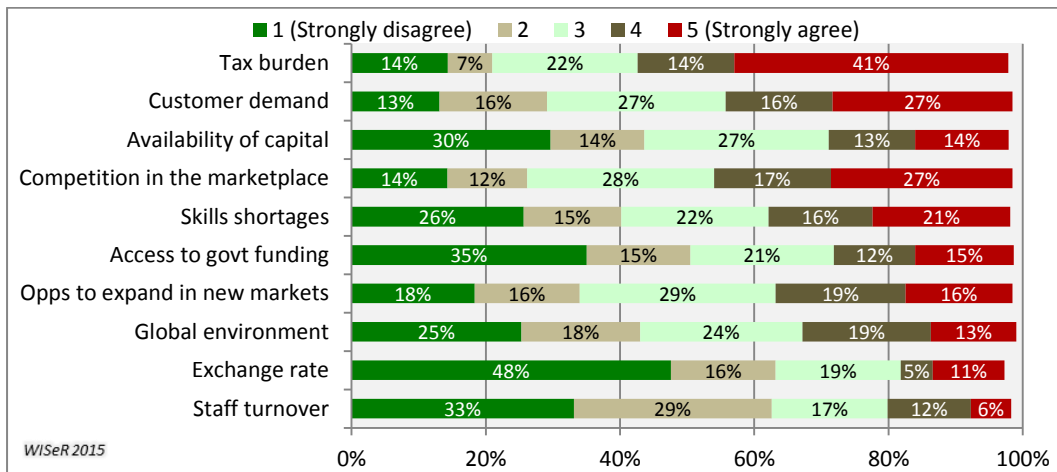
Ranked	November 2013	May 2014	November 2014
1	48% Tax burden	50% Tax burden	55% Tax burden
2	46% Customer demand	43% Competition in the marketplace	44% Competition in the marketplace
3	43% Competition in the marketplace	40% Customer demand	43% Customer demand
4	40% Skills shortage	32% Skills shortage	37% Skills shortage

Top four ranked by highest proportion of establishments either agreeing or strongly agreeing to statement.

At the other end of the scale, the impact due to exchange rate and staff turn-over remained low. Only 16% of employers indicated the exchange rate affect performance in November 2013, increasing slightly to 19% in May 2014, and declining back to 16% in November 2014. Those indicating staff turnover affected performance remained consistently low and between 18% and 19% across the three time periods. Concerns about access to government funding dipped in May 2014 perhaps reflecting the Federal Government budget cycle.

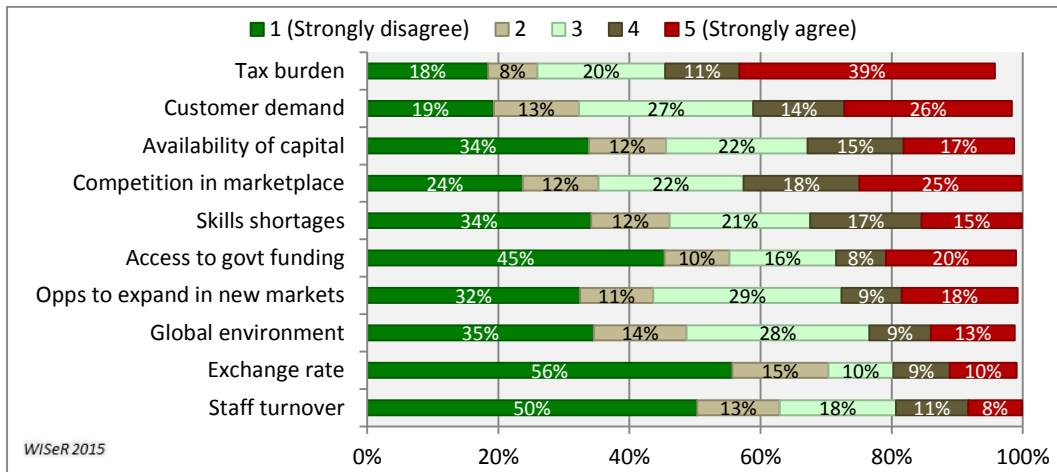
¹⁶ The related data tables are available in Appendix B.

FIGURE 40: FACTORS THAT AFFECT PERFORMANCE (% OF EMPLOYERS): NOVEMBER 2014



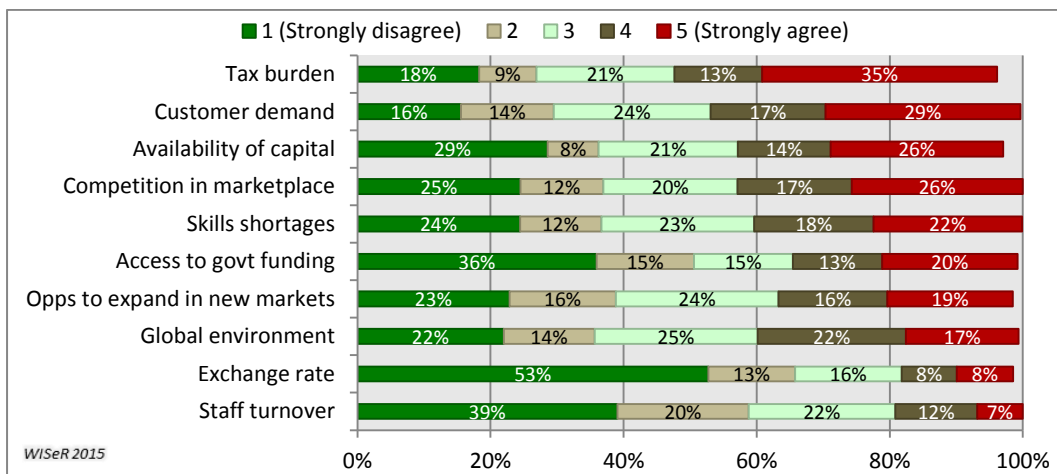
November 2014 base: All employers (weighted=9,039; unweighted=387).
 Note: Not applicable/unsure responses are not shown.

FIGURE 41: FACTORS THAT AFFECT PERFORMANCE (% OF EMPLOYERS): MAY 2014



May 2014 base: All employers (weighted=9,956; unweighted=455).
 Note: Not applicable/unsure responses are not shown.

FIGURE 42: FACTORS THAT AFFECT PERFORMANCE (% OF EMPLOYERS): NOVEMBER 2013



November 2013 base: All employers (weighted=9,875; unweighted=451).
 Note: Not applicable/unsure responses are not shown.

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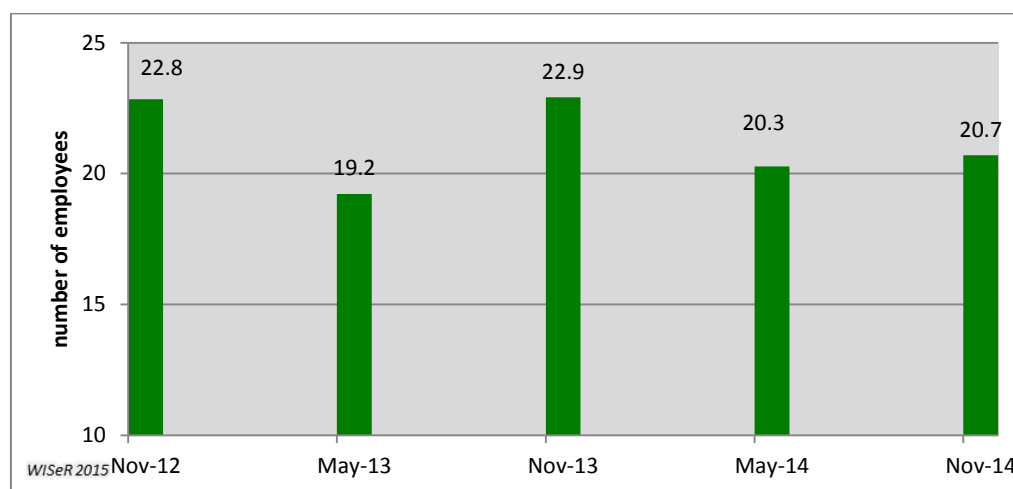
Appendix A. EMPLOYERS AND EMPLOYEES

SIZE OF ESTABLISHMENTS

CHANGE IN THE NUMBER OF EMPLOYEES: NOVEMBER 2012 TO NOVEMBER 2014

Data from the latest WFS in November 2014 indicate that the volatility in the reported number of employees with establishments between November 2013 and May 2014 has stabilised by November 2014. The average number of employees per establishment remained relatively unchanged at 20.7 in November 2014 (Figure 42). Given that the data for November 2012 and May 2013 are recall estimates of the number of employees made one year later in Waves 1 and 2 of the WFS, they should be interpreted with caution.¹⁷

FIGURE 43: AVERAGE NUMBER OF EMPLOYEES PER ESTABLISHMENT, NOVEMBER 2012-MAY 2014



November 2013: Weighted base=9,875 employers; unweighted base =451 employers.

May 2014: Weighted base= 9,919 employers; unweighted base =452 employers.

November 2014: Weighted base=9,021 employers; unweighted base =386 employers.

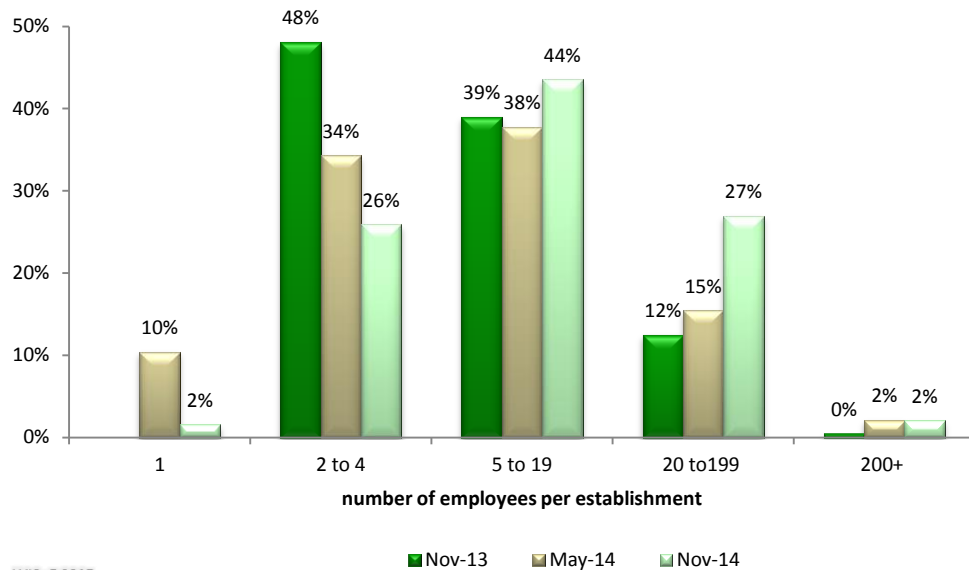
Note: Data for November 2012 and May 2013 are one-year recall data as reported by employers.

The distribution of establishments as defined by the number of current employees is presented in Figure 43 and illustrates changes across all three waves of the WFS (November 2013, May 2014 and November 2014). While the WFS is restricted to establishments with two or more employees, Waves 2 and 3 of the survey (in May 2014 and November 2014) consist of a small number of establishments with only one employee.¹⁸ In Wave 2 of the survey, this is partly a reflection of the decrease in the number of employees within responding organisations since the first round in November 2013 (n=16) and partly due to the inclusion of a small number of single-employee establishments in the replacement top-up sample in May 2014 (n=12). In the case of the Wave 3 sample, all six firms reflect a decrease in the number of employees from the previous round.

¹⁷ The data for November 2014, May 2014 and November 2013 are collected in the survey as the number of *current* employees in the organisation, while the data for November 2012 and May 2013 are collected as the reported number of employees within the organisation *12 months ago*.

¹⁸ In May 2014, there were 28 such firms accounting for 10% of the sample, and in November 2014 there were only 6 firms accounting for less than 2% of the sample.

FIGURE 44: DISTRIBUTION OF ESTABLISHMENTS (%) BY NUMBER OF CURRENT EMPLOYEES, NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014



WISeR 2015

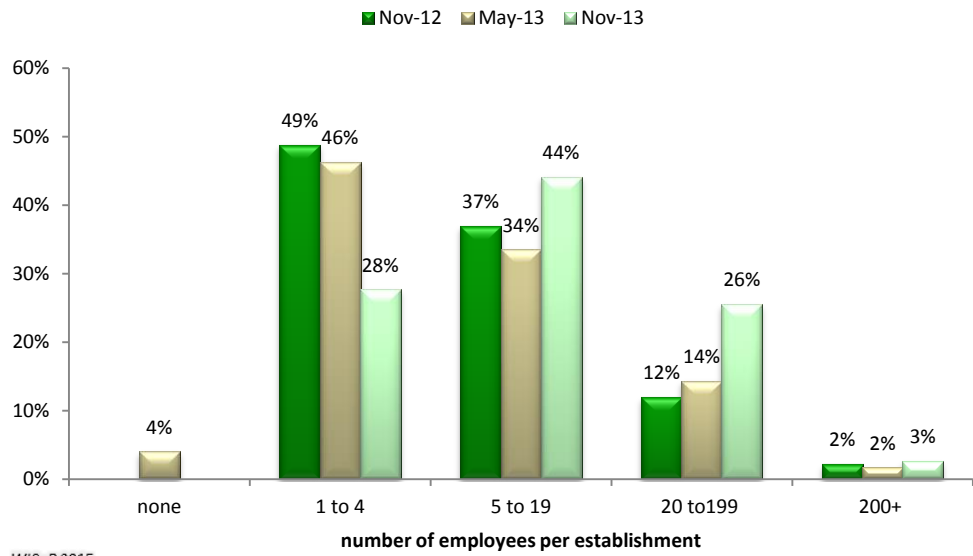
November 2013: Weighted base=9,875 employers; unweighted base =451 employers.
 May 2014: Weighted base= 9,919 employers; unweighted base =452 employers.
 November 2014: Weighted base=9,021 employers; unweighted base =386 employers.

Just over one quarter (26%) of establishments employed between two and four staff members in November 2014, reflecting an eight percentage point decline from May 2014, and a twenty-two percentage point decline from November 2013. The proportion of establishments with five to nineteen employees remained stable between November 2013 (39%) and May 2014 (38%), but increased in November 2014 (44%). The proportion of large businesses completing the survey continued to increase with firms employing 20 to 199 staff almost doubling from 15% in May 2014 to 27% in November 2014. The share of firms with 200 or more employees remained stable at 2% from May 2014 to November 2014.

REPORTED NUMBER OF EMPLOYEES AT NOVEMBER 2012, MAY 2013 AND NOVEMBER 2013

Respondents to all three waves of the WFS provided recall estimates of the number of employees 12 months earlier. This provides additional information on changes in employment levels over time. Four percent of establishments in Wave 2 of the survey reported that they had no employees a year earlier (at May 2013; see Figure 44). The proportion of establishments reporting they had one to four employees continued to decline from 49% in November 2013 to 46% in May 2014 and only 28% in November 2014. On the other hand the proportion of establishments estimating 5 to 19 employees one year earlier increased from 34% in May 2014 to 44% in November 2014. The proportion of organisations with 20 to 199 employees also increased across all three waves (from 12% in November 2013 to 14% in May 2014 and 26% in November 2014). The proportion of very large establishments (200+ employees) remained between 2% and 3%.

FIGURE 45: ESTIMATED NUMBER OF EMPLOYEES AT NOVEMBER 2012, MAY 2013 & NOVEMBER 2013 (% OF EMPLOYERS)

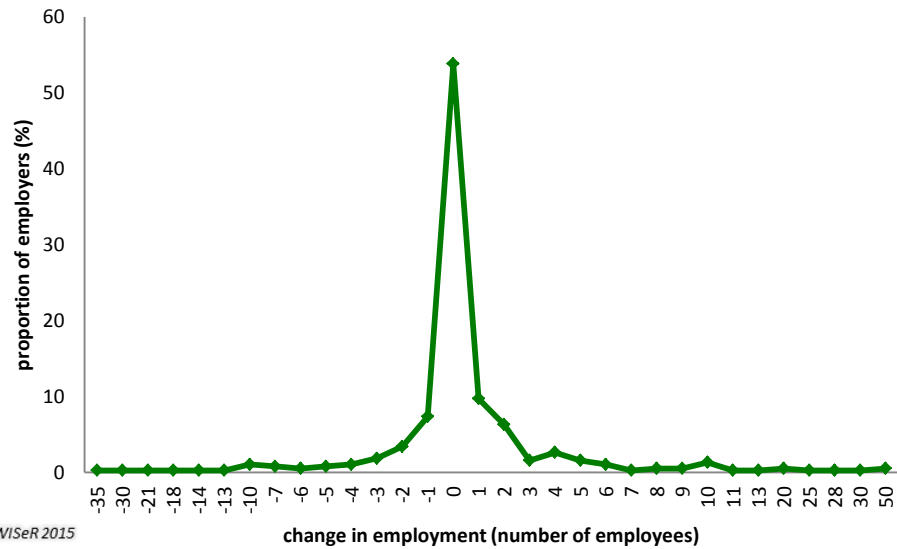


WISer 2015

November 2013: Weighted base=5,812 employers; unweighted base =435 employers.
 May 2014: Weighted base= 9,695 employers; unweighted base =434 employers.
 November 2014: Weighted base=8,965 employers; unweighted base =381 employers.

Figure 45 further illustrates the change in reported employment over 12 months within establishments. Nearly 57% of employers did not see any change in staff numbers between November 2013 and November 2014.

FIGURE 46: CHANGE IN EMPLOYMENT OVER 12 MONTHS, NOVEMBER 2014



WISer 2015

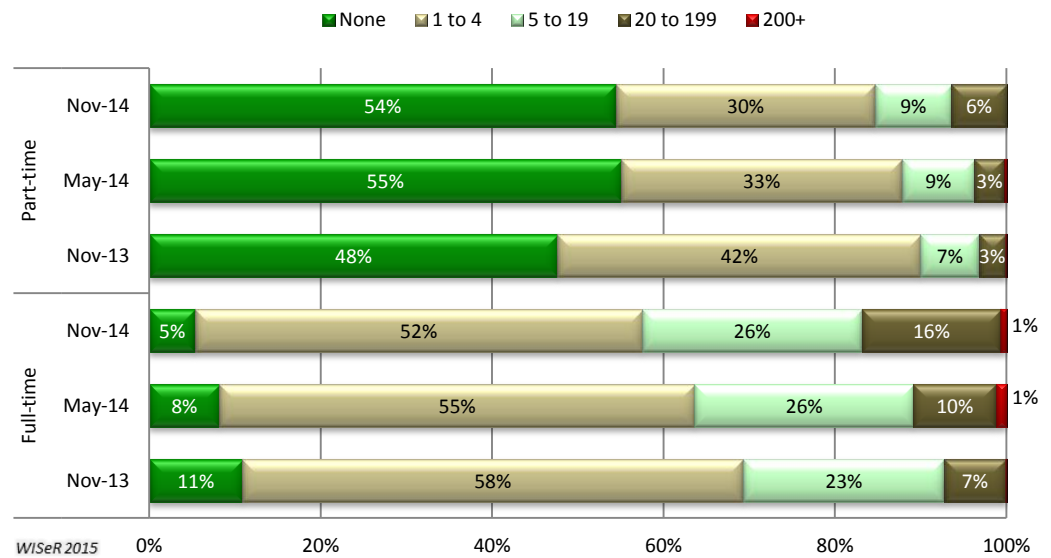
November 2014: Weighted base= 9,039 employers; unweighted base =387 employers.

EMPLOYMENT TYPE

FULL-TIME AND PART-TIME EMPLOYEES

The composition of employment types within establishments is presented in Figure 46, which shows the distribution of full-time and part-time employees across all three waves of the WFS. The proportion of establishments completing the survey that did not employ any full-time staff continued to decrease (11% in November 2013, 8% in May 2014 and 5% in November 2014).

FIGURE 47: FULL-TIME AND PART-TIME EMPLOYEES IN ORGANISATIONS (% OF EMPLOYERS), NOVEMBER 2013-NOVEMBER 2014



November 2013: Weighted base=9,868 employers; unweighted base =449employers.

May 2014: Weighted base= 9,891 employers; unweighted base =450 employers.

November 2014: Weighted base=9,039 employers; unweighted base =387 employers.

There has been an increase in the proportion of establishments with 20 to 199 full-time employees from 7% in Wave 1 to 10% in Wave 2 in May 2014 and to 16% in November 2014. In addition, just over one half of establishments (52%) had between one and four full-time workers in November 2014. Approximately one quarter of establishments employed between 5 and 19 full-time staff in November 2014 and May 2014 (26%) and November 2013 (23%).

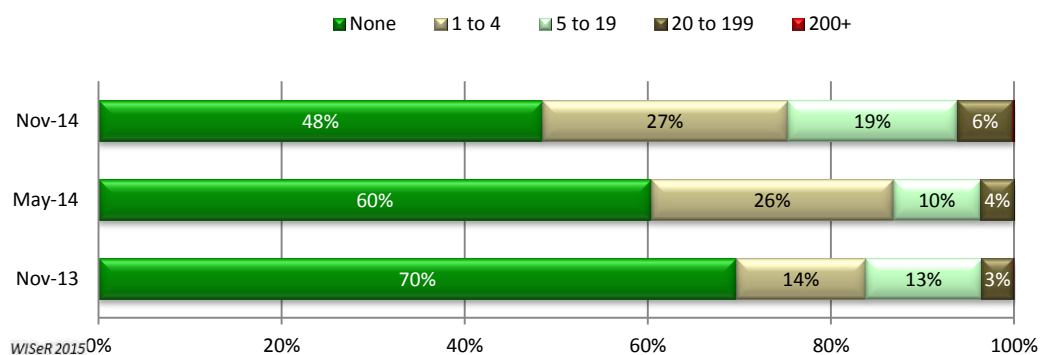
The proportion of establishments with no part-time employees remained stable between Wave 2 (55%) and Wave 3 (54%). Around one third of establishments had between one and four part-time workers in November 2014 (30%) and May 2014 (33%), reflecting approximately a ten percentage point decline from November 2013 (42%). Employers with five to nineteen part-time workers increased from 7% in November 2013 to 9% in May 2014 and November 2014. Establishments with 20 to 199 part-time employees doubled in November 2014 to 6% from 3% in May 2014 and November 2013.

CASUAL EMPLOYEES

The share of establishments with no casual employees fell from 70% in November 2013 to 60% in May 2014, and to 48% in November 2014 (Figure 47). Firms with 1 to 4 casual employees remained steady between Waves 2 and 3 at 26% and 27%, respectively. The share of firms employing between 5 and 19 casual workers increased to 19% in November 2014. This reflects a nine percentage point increase from May 2014 (10%) and a six

percentage point increase from November 2013 (13%). Those with 20 to 199 casual employees increased from 4% in May 2014 to 6% in November 2014.

FIGURE 48: DISTRIBUTION OF CASUAL EMPLOYEES WITHIN ESTABLISHMENTS (% OF EMPLOYERS): NOVEMBER 2013 – NOVEMBER 2014

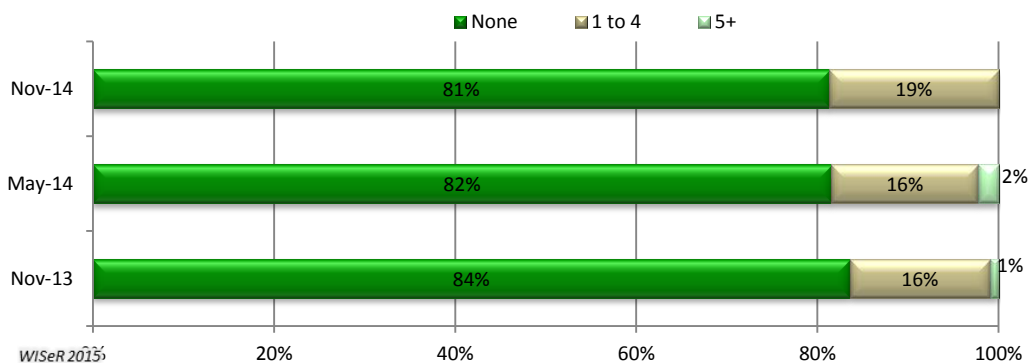


November 2013: Weighted base=8,801 employers; unweighted base =408 employers.
 May 2014: Weighted base= 9,807 employers; unweighted base =445 employers.
 November 2014: Weighted base=8,773 employers; unweighted base =381 employers.

APPRENTICES

The distribution of establishments with apprentices in their workforce remains fairly consistent across the three waves (Figure 49). The share of establishments with no apprentices was 81% in November 2014, compared to 82% in May 2014, and 84% in November 2013.

FIGURE 49: DISTRIBUTION OF APPRENTICES WITHIN ESTABLISHMENTS (% OF EMPLOYERS): NOVEMBER 2013 – NOVEMBER 2014



November 2013: Weighted base=9,875 employers; unweighted base =451 employers.
 May 2014: Weighted base= 9,807 employers; unweighted base =445 employers.
 November 2014: Weighted base=8,773 employers; unweighted base =381 employers.

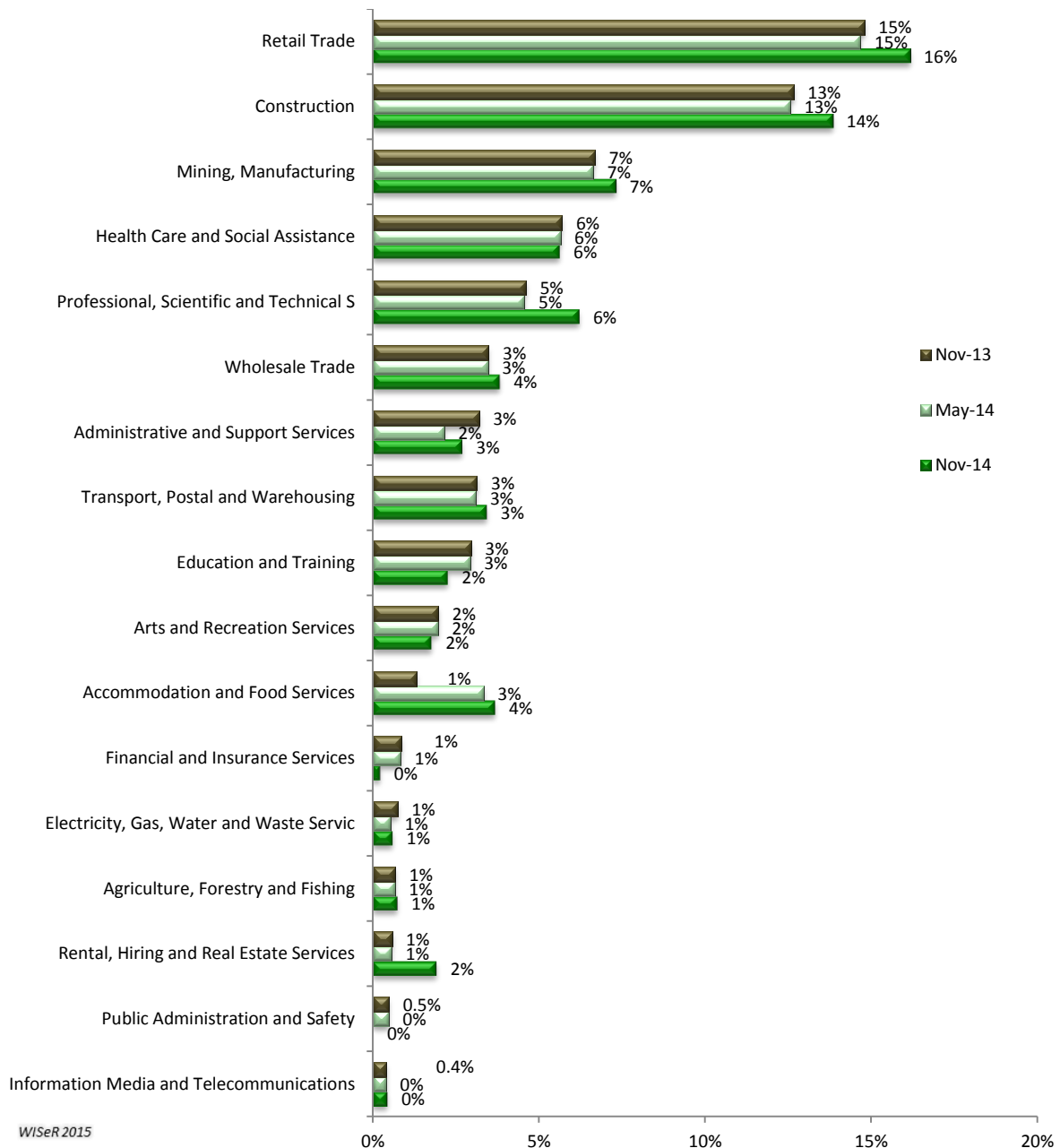
INDUSTRY DISTRIBUTION

Establishments in the WFS are classified according to their main activity using the Australia and New Zealand Standard Industrial Classification (ANZSIC) codes. The distribution of industries within Playford and Salisbury in November 2013, May 2014 and November 2014 is presented in Figure 49.¹⁹ Overall, industrial distribution has remained relatively consistent across the three waves.

¹⁹ The industrial distribution presented here is based on the *Sensis* database.

Retail trade (15% - 16%) and construction (13%- 14%) are the dominant industries in Playford and Salisbury. They are followed by manufacturing (7%), health care and social assistance (6%) and professional services (5%-6%). Following the approach used in the previous waves of the WFS, establishments have been grouped into five broad industry categories in order to capture the 'industries of interest' in the region. They include manufacturing, construction, health care and social assistance, and retail trade along with the 'other' category which combines all other industries.²⁰

FIGURE 50: INDUSTRY DISTRIBUTION – ALL INDUSTRIES (% OF EMPLOYERS), NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014.



November 2013 base: All employers (weighted=9,875; unweighted=451).
 May 2014 base: All employers (weighted=9,956; unweighted=455).
 November 2014 base: All employers (weighted=9039; unweighted=387).
 Note: the 'other services' category is not presented in the figure.

²⁰ The 'other' industry category accounts for approximately 60% of the total in the first and second rounds of the survey.

Appendix B. DATA TABLES

TABLE 2: HPWP: WHEN RECRUITING, WE FIRST LIST WHAT SKILLS ARE REQUIRED AND THEN FOCUS ON THESE IN A STRUCTURED INTERVIEW

	Playford	Salisbury	Total
Strongly agree	18	31	28
Agree	46	42	43
Neither agree nor disagree	15	14	14
Disagree	8	6	6
Strongly disagree	1	1	1
Unsure/don't know	12	6	7
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 3: HPWP: WE HAVE PROCEDURES IN PLACE THAT SUCCESSFULLY IDENTIFY EMPLOYEE TRAINING NEEDS

	Playford	Salisbury	Total
Strongly agree	13	22	20
Agree	51	53	52
Neither agree nor disagree	11	11	11
Disagree	12	10	10
Strongly disagree	1	1	1
Unsure/don't know	12	3	5
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 4: HPWP: EMPLOYEES RECEIVE ONGOING TRAINING

	Playford	Salisbury	Total
Strongly agree	18	27	25
Agree	61	52	54
Neither agree nor disagree	5	11	9
Disagree	6	7	7
Strongly disagree	0	1	1
Unsure/don't know	9	3	4
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 5: HPWP: WE OFTEN TRAIN EMPLOYEES TO BECOME SKILLED IN A RANGE OF DIFFERENT ROLES

	Playford	Salisbury	Total
Strongly agree	15	22	21
Agree	51	49	49
Neither agree nor disagree	8	9	9
Disagree	16	11	13
Strongly disagree	0	3	2
Unsure/don't know	9	6	7
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 6: HPWP: WE STRIVE TO IDENTIFY GOOD PERFORMANCE AND REWARD INDIVIDUALS ACCORDINGLY

	Playford	Salisbury	Total
Strongly agree	19	30	27
Agree	56	48	50
Neither agree nor disagree	9	7	7
Disagree	5	7	7
Strongly disagree	1	1	1
Unsure/don't know	10	7	7
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 7: HPWP: WE TRY TO MAKE EMPLOYEES FEEL SECURE IN THEIR JOBS

	Playford	Salisbury	Total
Strongly agree	26	36	34
Agree	62	57	58
Neither agree nor disagree	2	1	1
Disagree	0	2	2
Strongly disagree	0	1	1
Unsure/don't know	10	3	4
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 8: HPWP: THERE IS A CLEAR PATH FOR EMPLOYEES TO DEVELOP WITHIN THIS ORGANISATION

	Playford	Salisbury	Total
Strongly agree	10	15	14
Agree	52	53	52
Neither agree nor disagree	13	16	15
Disagree	11	11	11
Strongly disagree	0	1	0
Unsure/don't know	14	5	7
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 9: HPWP: WE HAVE FORMAL PROCESSES FOR EMPLOYEES TO MAKE SUGGESTIONS ABOUT HOW THINGS CAN BE IMPROVED

	Playford	Salisbury	Total
Strongly agree	14	19	18
Agree	51	57	56
Neither agree nor disagree	13	8	9
Disagree	13	11	12
Strongly disagree	1	1	1
Unsure/don't know	8	3	4
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 10: HPWP: THERE ARE REGULAR MEETINGS BETWEEN EMPLOYEES AND MANAGERS

	Playford	Salisbury	Total
Strongly agree	18	26	24
Agree	43	44	44
Neither agree nor disagree	7	9	9
Disagree	19	15	16
Strongly disagree	1	1	1
Unsure/don't know	11	6	7
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 11: HPWP: MANAGEMENT FREQUENTLY COMMUNICATES WIDER BUSINESS GOALS AND DECISIONS TO EMPLOYEES

	Playford	Salisbury	Total
Strongly agree	17	23	22
Agree	47	54	52
Neither agree nor disagree	17	4	7
Disagree	7	11	11
Strongly disagree	1	3	2
Unsure/don't know	12	4	6
Total	100	100	100

Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 12: DISTRIBUTION OF ESTABLISHMENTS (%) BY NUMBER OF CURRENT EMPLOYEES

Number of employees	Nov-13	May-14	Nov-14
1	--	10.4	1.5
2 to 4	48.1	34.3	25.9
5 to 19	39.0	37.7	43.5
20 to199	12.5	15.4	26.9
200+	0.5	2.1	2.1
Total	100	100	100

November 2013: Weighted base=9,875 employers; unweighted base =451employers.

May 2014: Weighted base= 9,919 employers; unweighted base =452 employers.

November 2014: Weighted base= 9,021 employers; unweighted base =386 employers.

TABLE 13: DISTRIBUTION OF ESTABLISHMENTS (%) BY REPORTED NUMBER OF EMPLOYEES 12 MONTHS AGO

	Nov-12	May-13	Nov-13
None	--	4.1	--
1 to 4	48.8	46.3	27.7
5 to 19	37.0	33.5	44.1
20 to199	12.0	14.3	25.5
200+	2.2	1.7	2.6
Total	100	100	100

November 2013: Weighted base=5,812 employers; unweighted base =435employers.

May 2014: Weighted base= 9,695 employers; unweighted base =434 employers.

November 2014: Weighted base= 8,966 employers; unweighted base =381 employers.

TABLE 14: EMPLOYMENT TYPE DISTRIBUTION (% OF ESTABLISHMENTS): FULL-TIME/PART-TIME

	Full-time			Part-time		
	Nov-13	May-14	Nov-14	Nov-13	May-14	Nov-14
None	10.9	8.2	5.4	47.7	55.1	54.5
1 to 4	58.4	55.4	52.2	42.3	32.7	30.2
5 to 19	23.5	25.5	25.6	6.8	8.5	9.0
20 to 199	7.1	9.6	16.2	3.1	3.4	6.4
200+	0.1	1.2	0.7	0.1	0.3	0.0
Total	100	100	100	100	100	100

November 2013: Weighted base=9,868 employers; unweighted base =449employers.

May 2014: Weighted base= 9,891 employers; unweighted base =450 employers.

November 2014: Weighted base= 9,039 employers; unweighted base =387 employers.

TABLE 15: EMPLOYMENT TYPE DISTRIBUTION (% OF ESTABLISHMENTS): CASUAL EMPLOYEES

Casual	Nov-13	May-14	Nov-14
None	69.6	60.3	48.5
1 to 4	14.1	26.4	26.7
5 to 19	12.6	9.6	18.6
20 to 199	3.5	3.7	6.1
200+	0.1		0.1
Total	100	100	100

November 2013: Weighted base=8,801 employers; unweighted base =408 employers.

May 2014: Weighted base= 9,807 employers; unweighted base =445 employers.

November 2014: Weighted base= 8,773 employers; unweighted base =381 employers.

TABLE 16: EMPLOYMENT TYPE DISTRIBUTION (% OF ESTABLISHMENTS): APPRENTICES

Apprentices	Nov-13	May-14	Nov-14
None	83.6	81.6	81.4
1 to 4	15.5	16.2	18.6
5+	0.9	2.2	-
Total	100	100	100

November 2013: Weighted base=9,875 employers; unweighted base =451employers.

May 2014: Weighted base= 9,807 employers; unweighted base =445 employers.

November 2014: Weighted base= 8,773employers; unweighted base =381 employers.

TABLE 17: INDUSTRY DISTRIBUTION (% OF ESTABLISHMENTS), NOVEMBER 2013

Nov-13	Playford	Salisbury	Total
Information Media and Telecommunications	0.3	0.4	0.4
Public Administration and Safety	0.0	0.7	0.5
Rental, Hiring and Real Estate Services	1.9	0.0	0.6
Agriculture, Forestry and Fishing	1.8	0.2	0.7
Electricity, Gas, Water and Waste Servic	0.7	0.8	0.7
Financial and Insurance Services	0.6	0.9	0.8
Accommodation and Food Services	4.3	0.0	1.3
Arts and Recreation Services	1.8	2.1	2.0
Education and Training	2.9	3.0	3.0
Transport, Postal and Warehousing	2.4	3.5	3.1
Administrative and Support Services	3.4	3.1	3.2
Wholesale Trade	1.9	4.2	3.5
Professional, Scientific and Technical S	3.9	4.9	4.6
Health Care and Social Assistance	6.5	5.3	5.7
Mining, Manufacturing	4.6	7.6	6.7
Construction	10.8	13.5	12.7
Retail Trade	16.9	13.9	14.8
Other Services	35.3	36.1	35.9
Total	100	100	100

November 2013 base: All employers (weighted=9,875; unweighted=451).

TABLE 18: INDUSTRY DISTRIBUTION (% OF ESTABLISHMENTS), MAY 2014

May-14	Playford	Salisbury	Total
Information Media and Telecommunications	0.4	0.4	0.4
Public Administration and Safety	0.0	0.7	0.5
Rental, Hiring and Real Estate Services	1.9	0.0	0.6
Agriculture, Forestry and Fishing	1.9	0.2	0.7
Electricity, Gas, Water and Waste Services	0.0	0.8	0.5
Financial and Insurance Services	0.7	0.9	0.8
Accommodation and Food Services	4.5	2.9	3.3
Arts and Recreation Services	1.8	2.0	2.0
Education and Training	3.1	2.9	2.9
Transport, Postal and Warehousing	2.5	3.4	3.1
Administrative and Support Services	0.0	3.0	2.1
Wholesale Trade	1.9	4.1	3.5
Professional, Scientific and Technical Services	4.1	4.8	4.6
Health Care and Social Assistance	6.8	5.2	5.6
Mining, Manufacturing	4.8	7.4	6.6
Construction	11.3	13.1	12.6
Retail Trade	17.6	13.5	14.7
Other Services	36.8	35.1	35.6
Total	100	100	100

May 2014 base: All employers (weighted=9,956; unweighted=455).

TABLE 19: INDUSTRY DISTRIBUTION (% OF ESTABLISHMENTS), NOVEMBER 2014

Nov-14	Playford	Salisbury	Total
Information Media and Telecommunications	0.5	0.4	0.4
Public Administration and Safety	0.0	0.0	0.0
Rental, Hiring and Real Estate Services	0.5	2.3	1.9
Agriculture, Forestry and Fishing	2.6	0.2	0.7
Electricity, Gas, Water and Waste Services	0.0	0.8	0.6
Financial and Insurance Services	0.9	0.0	0.2
Accommodation and Food Services	6.3	2.9	3.7
Arts and Recreation Services	0.9	2.0	1.8
Education and Training	0.0	2.9	2.3
Transport, Postal and Warehousing	3.5	3.4	3.4
Administrative and Support Services	1.4	3.1	2.7
Wholesale Trade	2.7	4.1	3.8
Professional, Scientific and Technical Services	10.9	4.8	6.2
Health Care and Social Assistance	6.9	5.2	5.6
Manufacturing	6.7	7.5	7.3
Construction	15.9	13.2	13.8
Retail Trade	24.8	13.6	16.2
Other Services	15.5	33.5	29.5
Total	100	100	100

November 2014 base: All employers (weighted=9039; unweighted=387).

TABLE 20: FACTORS THAT AFFECT ORGANISATIONAL PERFORMANCE (% OF ESTABLISHMENTS), NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014

	1 (strongly agree)	2	3	4	5 (strongly disagree)	na/ unsure/ don't know
Nov-13						
Tax burden	18	9	21	13	35	4
Customer demand	16	14	24	17	29	0
Competition in the marketplace	25	12	20	17	26	0
Opportunities to expand in new markets	23	16	24	16	19	1
Exchange rate	53	13	16	8	8	1
Availability of capital	29	8	21	14	26	3
Skills shortages	24	12	23	18	22	0
Staff turnover	39	20	22	12	7	0
Global environment	22	14	25	22	17	1
Access to government funding	36	15	15	13	20	1
May-14						
Tax burden	18	8	20	11	39	4
Customer demand	19	13	27	14	26	2
Competition in the marketplace	24	12	22	18	25	0
Opportunities to expand in new markets	32	11	29	9	18	1
Exchange rate	56	15	10	9	10	1
Availability of capital	34	12	22	15	17	1
Skills shortages	34	12	21	17	15	0
Staff turnover	50	13	18	11	8	0
Global environment	35	14	28	9	13	1
Access to government funding	45	10	16	8	20	1
Nov-14						
Tax burden	14	7	22	14	41	2
Customer demand	13	16	27	16	27	2
Competition in the marketplace	14	12	28	17	27	2
Opportunities to expand in new markets	18	16	29	19	16	2
Exchange rate	48	16	19	5	11	3
Availability of capital	30	14	27	13	14	2
Skills shortages	26	15	22	16	21	2
Staff turnover	33	29	17	12	6	2
Global environment	25	18	24	19	13	1
Access to government funding	35	15	21	12	15	1

November 2013 base: All employers (weighted=9,875; unweighted=451).

May 2014 base: All employers (weighted=9,956; unweighted=455).

November 2014 base: All employers (weighted=9039; unweighted=387).

TABLE 21: EMPLOYER SENTIMENT INDICATORS – TO NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014 (% OF ESTABLISHMENTS)

	Intentions to invest in the next 12 months	Intentions to recruit in the next 12 months	Expectations for business profits in the next 12 months	Expectations for sales in the next 12 months	Expectations for growth in the next 12 months
Nov-13					
Strong increase	11.6	3.3	6.5	8.3	7.0
Moderate increase	39.6	30.0	43.3	44.8	51.2
No change	36.6	60.8	37.3	24.2	32.7
Moderate decrease	6.2	3.3	3.6	3.9	2.9
Strong decrease	2.9	0.6	3.0	2.5	2.6
Unsure	2.9	2.0	6.3	4.5	3.0
Not applicable	0.1	-	-	11.7	0.6
May-14					
Strong increase	8.1	5.1	4.6	5.2	7.8
Moderate increase	33.6	24.5	35.0	41.3	44.8
No change	41.4	58.4	40.7	27.2	32.5
Moderate decrease	5.9	3.9	11.8	12.4	9.5
Strong decrease	1.9	1.5	1.6	1.1	2.1
Unsure	7.7	5.1	4.9	3.2	3.4
Not applicable	1.3	1.6	1.3	9.6	0.0
Nov-14					
Strong increase	10.1	7.6	5.1	4.9	4
Moderate increase	38.3	28.3	44.2	47.6	49.5
No change	35.4	55.8	33.3	27.3	36.7
Moderate decrease	10.7	3.7	12.9	7.3	5.7
Strong decrease	1.8	1.3	2.2	2	2.2
Unsure	3.5	3.4	2.3	2.9	2.1
Not applicable	0.2	-	0.1	8.1	-

November 2013: Weighted base: 8,613 employers; unweighted base: 399 employers.

May 2014: Weighted base= 8,685 employers; unweighted base =406 employers.

November 2014: Weighted base=8,228 employers; unweighted base =336 employers.

Note: Not applicable/unsure responses are not shown.

TABLE 22: NUMBER OF VACANCIES: NOVEMBER 2013 TO NOVEMBER 2015 (% OF EMPLOYERS)

Number of vacancies	Nov-13	May-14	to Nov-14	to May-15	To Nov-15
No vacancies	85.8	87.19	53.2	59.98	44.4
1	7.0	5.37	15.5	16.33	15.7
2	4.9	4.12	15.0	8.78	12.3
3 to 5	1.4	2.0	7.2	5.6	14.9
6+	0.5	0.5	4.9	2.3	8.1
Don't know	0.5	0.85	4.3	7.07	4.6
Total	100.0	100.0	100	100	100

November 2013 base: All employers (weighted=9,875; unweighted=451).

May 2014 base: All employers (weighted=9,956; unweighted=455).

November 2014 base: All employers (weighted=9039; unweighted=387).

TABLE 23: CURRENTLY VACANT OCCUPATIONS (% OF EMPLOYERS) – NOVEMBER 2013, MAY 2014 AND NOVEMBER 2014

Occupation	Nov-13	May-14	Nov-14
Community & personal Svc	16.5	3.0	1.2
Managers	2.3	2.4	1.9
Machinery operators & drivers	8.0	2.2	5.2
Clerical & administrative	10.1	15.0	11.7
Sales workers	11.4	24.6	12.4
Labourers	11.8	9.5	14.5
Professionals	14.1	21.3	14.5
Other	5.2	8.6	18.0
Technicians & tradespersons	20.6	13.5	20.8
Total	100	100	100

November 2013: Weighted base: 1,342 employers; unweighted base: 86 employers.

May 2014: Weighted base= 1,261 employers; unweighted base =65 employers.

November 2014: Weighted base=1,8445employers; unweighted base =74 employers.

TABLE 24: EXPECTED VACANCIES IN THE NEXT 12 MONTHS: TO NOVEMBER 2014, MAY 2015 AND NOVEMBER 2015

Occupation	to Nov-14	to May-15	to Nov-15
Managers	1.0	0.2	2.7
Community & personal Svc	4.3	9.0	4.5
Clerical & Admin	15.2	8.1	4.8
Other	9.9	3.6	7.4
Machinery operators & drivers	5.0	5.6	8.3
Sales Workers	17.4	12.8	10.6
Labourers	14.8	14.1	13.0
Professionals	9.3	12.2	21.8
Technicians & tradespersons	23.2	34.4	27.1
Total	100	100	100

November 2013: Weighted base: 4,203 employers; unweighted base: 214 employers.

May 2014: Weighted base= 3,326 employers; unweighted base =156 employers.

November 2014: Weighted base=4,599 employers; unweighted base =201 employers.

the 1990s, the number of people with a mental health problem has increased in the UK, and the number of people with a mental health problem who are in contact with mental health services has also increased (Mental Health Act 1983, 1990, 1994, 1997, 2003, 2007, 2010, 2013, 2017, 2020).

The 1990s saw the introduction of the Mental Health Act 1990, which replaced the Mental Health Act 1983. The 1990 Act introduced a new system of compulsory treatment orders (CTOs) and a new system of community treatment orders (CTOs). The 1990 Act also introduced a new system of mental health review tribunals (MHRTs).

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