



Casual work and part-time work in Australia in 2018

June 2018

There appears to be a widespread belief that ‘casualisation’ is increasing in Australia. It isn’t. This note sets out: how many Australians are permanent employees, casuals and self-employed workers; how many work part-time; and how many have changed jobs recently. As a proportion of the workforce, casual work has fluctuated between 19% and 21% of the total workforce over the past two decades. It is about the same in 2018 (20.6%) as it was in 1998 (20.1%).

Part-time work (under 35 hours per week) has grown across all types of employment over several decades. It has been over 30% of the workforce since 2013. This reflects demographics (more female and older workers), structural changes (more services jobs) and personal circumstances (more recognition and accommodation of study, family care and other personal commitments).

Key facts about casual work and part-time work in Australia in 2018

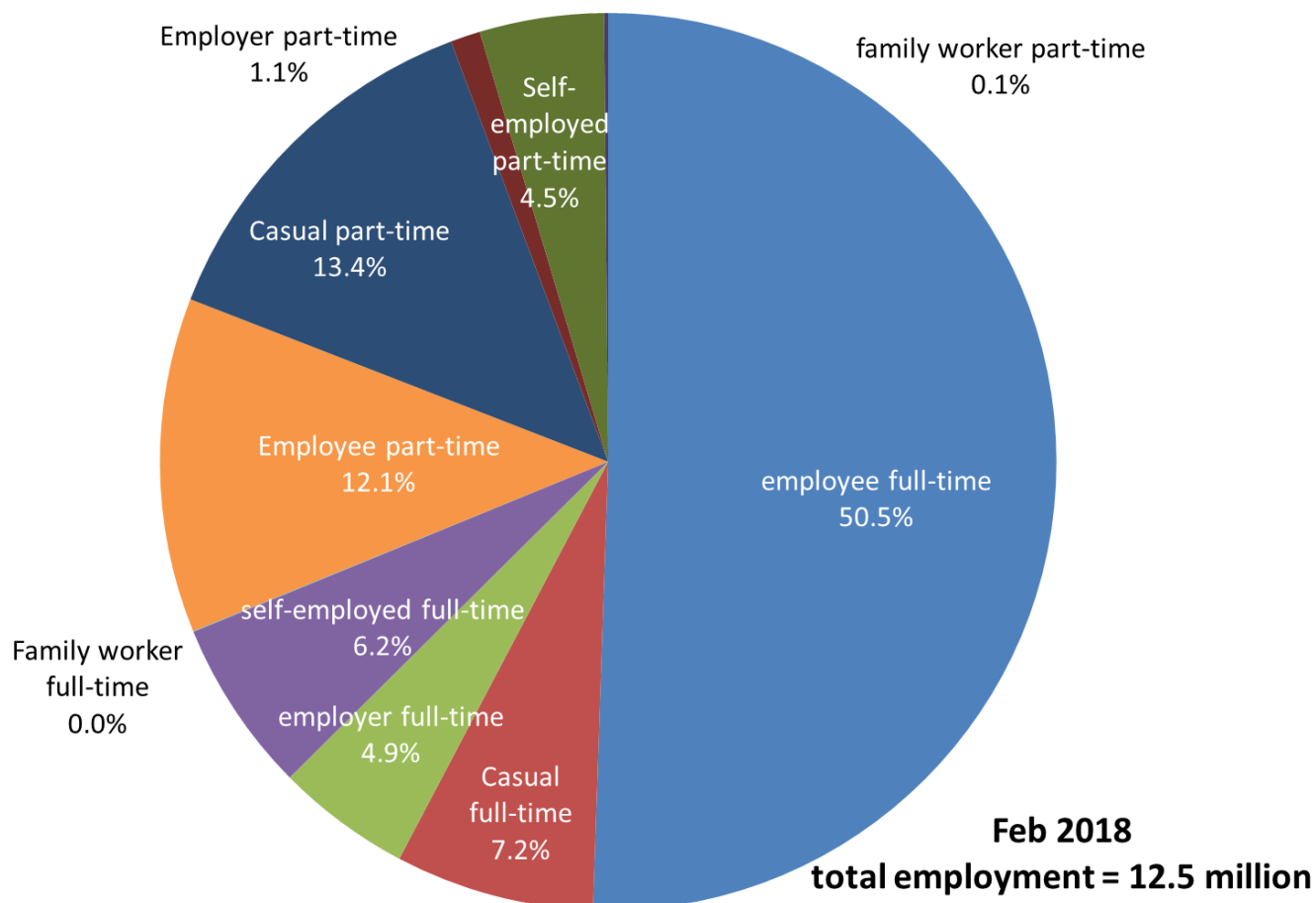
As of February 2018, 12.5 million people were engaged in paid work in Australia. Of these:

- **7.8 million or 62.6% were employed on a permanent basis** (that is, employees with paid leave entitlements). This was a higher proportion than two decades earlier (59% in 1998);
- **2.6 million or 20.6% were employed on a casual basis** (that is, employees with no paid leave entitlements). This was the same proportion of the workforce as two decades earlier;
- **1.3 million or 10.7% were self-employed** (that is, owner/managers of an enterprise with no other employees). This was a lower proportion than two decades earlier (12.0% in 1998); and
- **744,000 or 5.9% were employers** (that is owner/managers of an enterprise with employees other than themselves). This was a lower proportion than two decades earlier (7.8% in 1998).

Across all types of employment, 31% of Australian workers were working part-time (under 35 hours per week) in February 2018, up from 25% in 1998. 43% of part-time workers were employed on a casual basis, 40% were employed permanently and 18% were self-employed or employers.

Looking at job tenure, 2.4 million (19%) workers had been with their current business or employer for less than 12 months in Feb 2018. This was a lower proportion than at the start of the century (21% in 2001). Also in Feb 2018, 1.2 million workers (9.6%) did not expect to be with their current employer in 12 months’ time. This was a lower proportion than at the start of the century (10.7% in 2001). As of August 2016, 600,800 (5% of all workers) found their current employment through a labour-hire firm or employment agency. Only 133,700 of these workers (1.1% of all workers) were paid through such an agency, with the majority paid directly by their contracting employer.

What does work look like in Australia in 2018?



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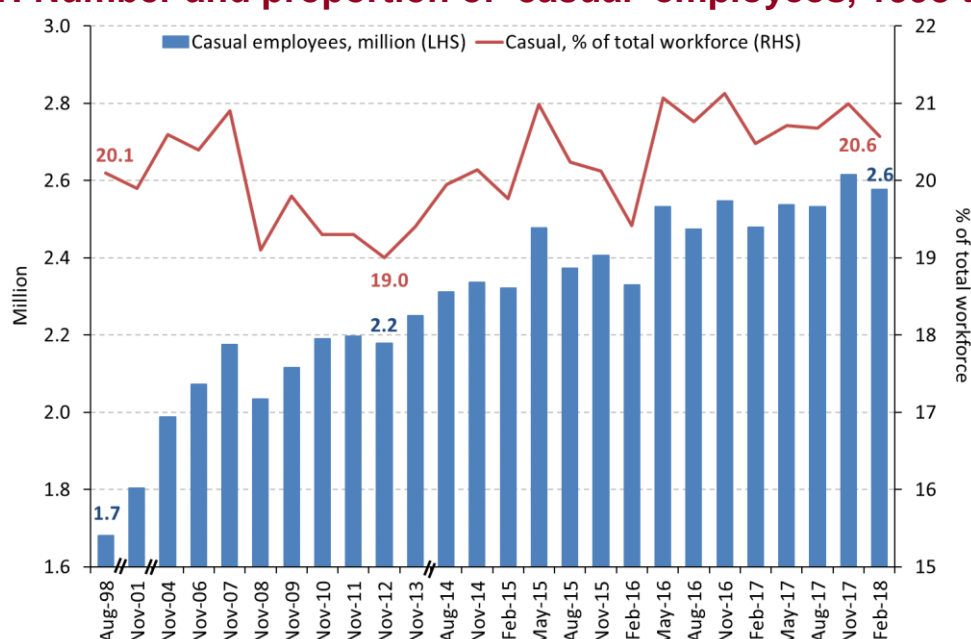
How many casual workers?

There is no fixed and standard definition of ‘casual worker’ or ‘casual employee’ in Australia. The most common proxy for identifying and measuring casual work in various ABS labour force data series is ‘employees without leave entitlements’. The ABS provides estimates of this group in its quarterly detailed *Labour Force Australia* dataset and in related data series. These data show that the number of ‘employees without leave entitlements’ has grown steadily over the past two decades, from 1.7 million people in August 1998 to 2.6 million people in February 2018 (chart 1).

This sounds like a big increase, but casual work has grown at a fairly similar rate to other categories of employment over this period, albeit with peaks and troughs at slightly different times. The number of casual workers grew by 53% over the twenty years to 2018, compared to 56% for permanent employees (with leave entitlements) and 48% for all workers (employees and self-employed and employers). This period included declines in the number of ‘owner/managers of unincorporated enterprises’ and (unpaid) ‘contributing family workers’, largely for legal and structural reasons (fewer unincorporated family-only business entities). Over the same twenty years, Australia’s (ageing) adult population grew by 37% but the labour force grew by 43%, as rising labour participation rates among women and older people pushed workforce growth higher.

As a proportion of the total workforce, casual work ended this period much as it began. It accounted for 20.6% of the total workforce (24.7% of employees) in February 2018 compared with 20.1% in 1998 (25% of employees). During this period, casual workers as a proportion of the total workforce hit a low of 19% in November 2012 and a high of 21.1% in November 2016.

Chart 1: Number and proportion of ‘casual’ employees, 1998 to 2018*

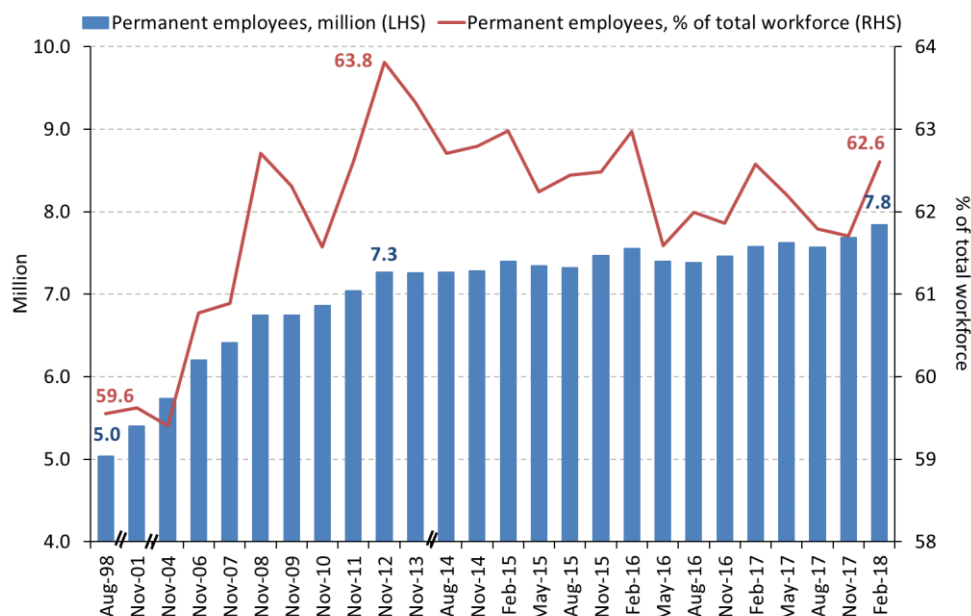


* Data available intermittently from August 1998 to August 2014. Data available quarterly from August 2014. Sources: ABS *characteristics of employment*; *Labour Force Australia, Detailed Quarterly*.

As a comparison, the other main type of employment in the ABS labour force data is ‘employees with leave entitlements’, which is the most common proxy for identifying and measuring ‘permanent employees’. The number and proportion of people in ‘permanent’ employment show a similar, somewhat cyclical, pattern to ‘casual’ workers over the same period (chart 2). The number of permanent employees has grown from 5 million in 1998 to 7.8 million in 2018 (an increase of 55.7%).

As a proportion of the total workforce, ‘permanent’ employees grew from 59% in 1998 to a peak of 63.8% in 2012 (coinciding with the peak of the mining construction boom, which employed thousands of additional construction workers for a relatively short time). The proportion of permanent employees then bounced down to 61.6% of the total workforce in 2016 and 2017 before recovering to 62.6% in 2018 (latest data available). Aside from this (probably cyclical) peak in 2012, this pattern does not suggest a long-term structural decline in ‘permanent’ employment.

Chart 2: Number and proportion of ‘permanent’ employees, 1998 to 2018*



* Data available intermittently from August 1998 to August 2014. Data available quarterly from August 2014. Sources: ABS *characteristics of employment*, *Labour Force Australia, Detailed Quarterly*.

Which industries employ casual workers?

The number of casual workers is largest in hospitality (food and accommodation services), retail and healthcare services. Together they accounted for close to half of all casual workers in 2018 (chart 3). Relatively large numbers are also employed in construction, manufacturing, education and transport, reflecting the large size of these industries as employers. As a proportion of each industry's workforce, casual work is most prevalent in hospitality (over half its workforce were casuals in 2018), arts and recreation services and retail trade (over one third in each) (chart 4).

Chart 3: Number of casual workers by industry, 2014 to 2018

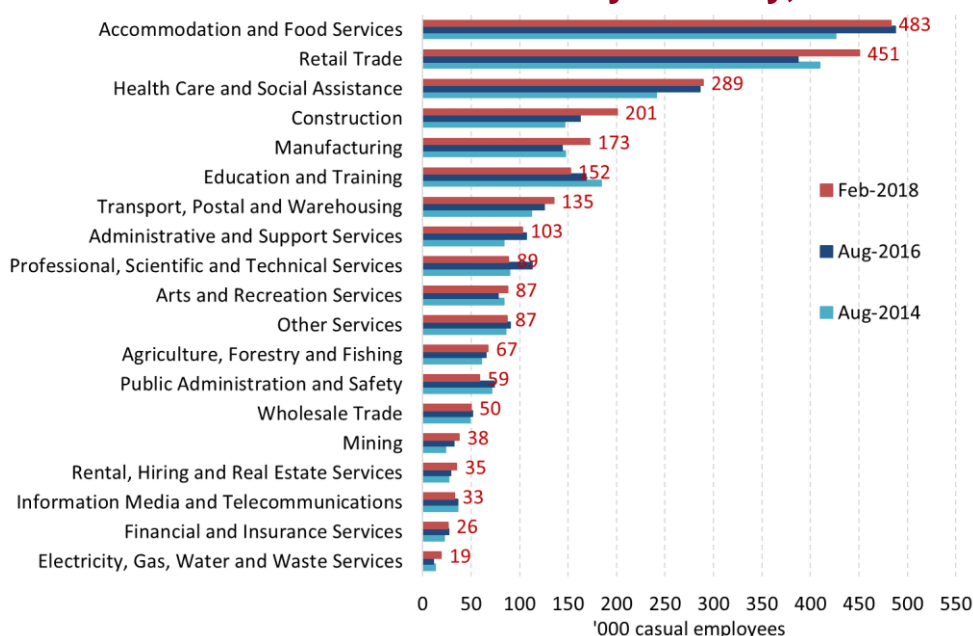
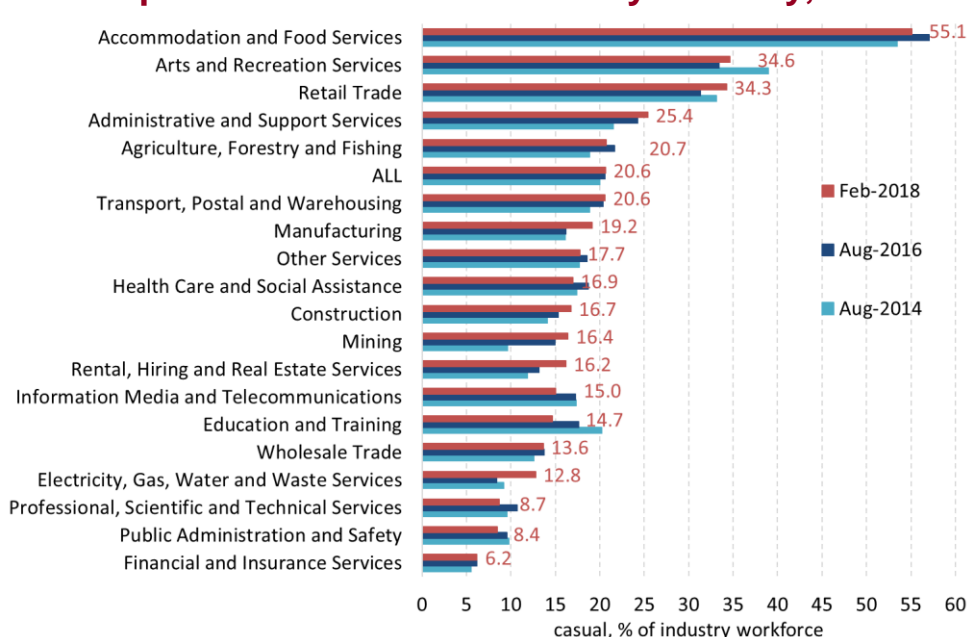


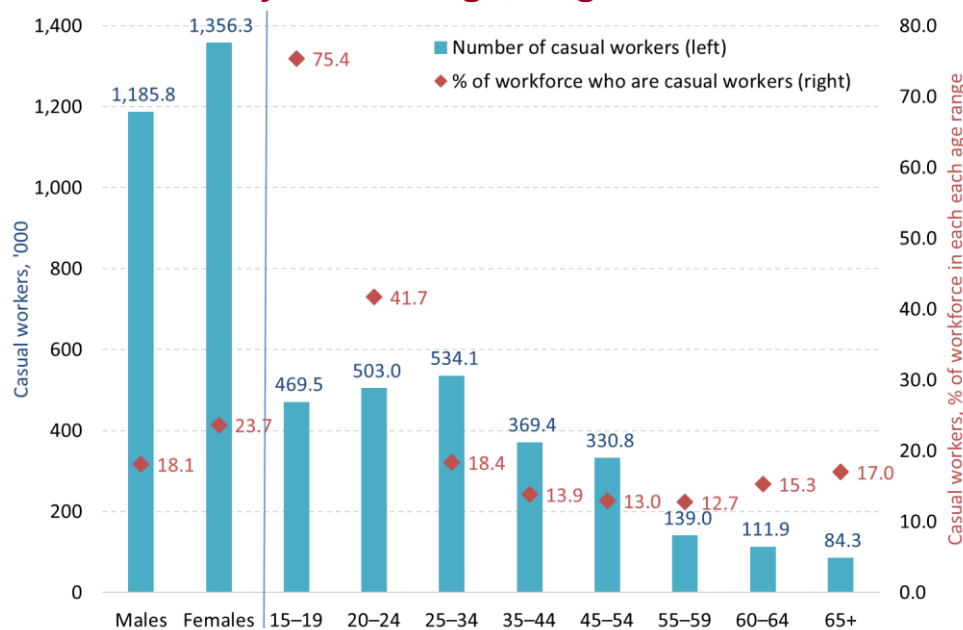
Chart 4: Proportion of casual workers by industry, 2014 to 2018



Who are Australia's casual workers?

The demographic profile of casual workers in Australia largely tells a 'life-cycle' story of employment and career progression. This is most obvious across age ranges. In August 2017 (latest available data with appropriate demographic detail), 18.5% of Australia's casual workers were aged 15-19 years and a further 19.8% were aged 20-24 years. Across all ages, 18.4% of casual workers were a dependent student within a family household and a further 13.8% were a non-dependent child within a family household. Of the 623,000 people aged 15-19 years who were doing some paid employment in August 2017, 75% were employed on a casual basis. Of the 1.2 million people aged 20-24 years who were working in August 2017, 42% were employed on a casual basis. For workers aged 25 to 60 years, the proportion of workers who are in casual work drops dramatically. It then rises gently again for workers aged 60 years and over (chart 5).

Chart 5: Number and proportion of casual workers, by sex and age, August 2017



Source: ABS *characteristics of employment*, 2017.

In August 2017, 53.4% of all casual workers were female and 46.6% were male. Differences in labour force participation and total worker numbers (with more male than female workers across the economy) meant that 18.1% of all male workers and 23.7% of all female workers were casual. Other demographic characteristics that are correlated with casual work include: current enrolment in education; lower formal skills; a non-English speaking birth country; and regional locations.

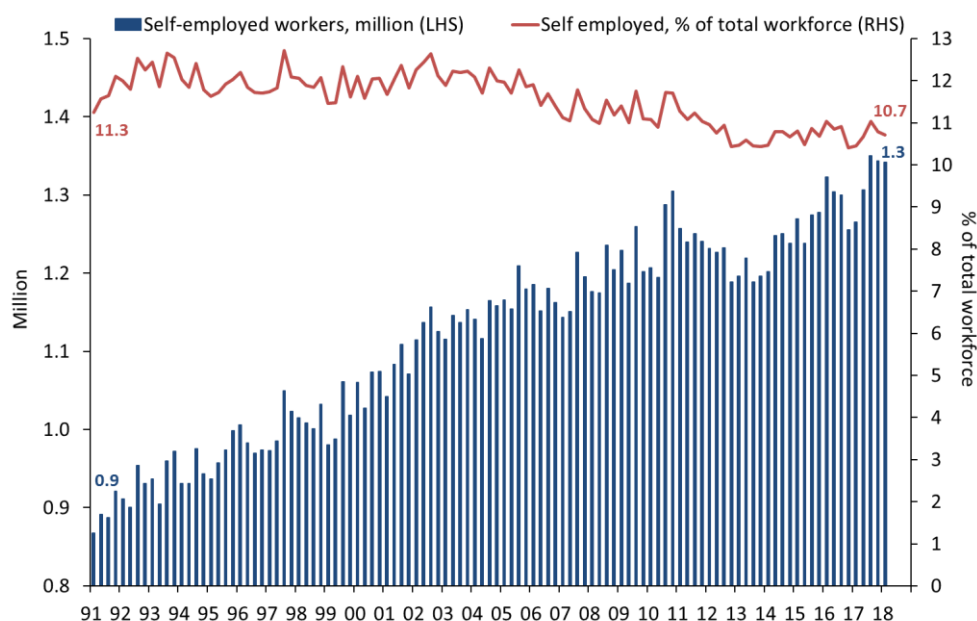
2. Self-employment

How many self-employed workers?

Another category of work that is sometimes confused or conflated with ‘casualisation’ is self-employment. Data on various types of self-employment are readily available for Australia’s national workforce on a consistent basis from 1991. This indicates that - like casual workers - the number of ‘owner/managers of an enterprise’ (incorporated or unincorporated) with no employees of their own has risen over the past two to three decades; from around 890,000 in 1991 to 1.3 million in 2018 (chart 6). Over an extended period, owner/managers have gradually shifted from unincorporated to incorporated structures for mainly legal reasons, even if they have no employees other than themselves.

As a proportion of the workforce, self-employed owner/managers with no employees have hovered between 10.5 and 11.0% of the total workforce since 2012. Looking at changes over a longer period, this group has declined as a proportion of the total workforce since the 1990s, when it was typically over 12% (chart 6).

Chart 6: Number and proportion of ‘self-employed’ workers, 1991 to 2018



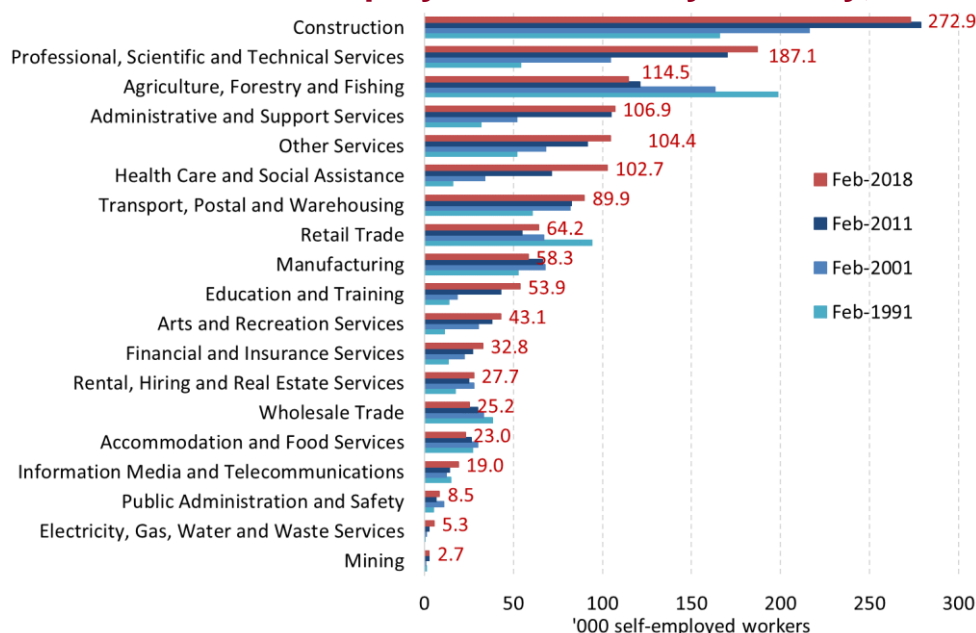
Sources: ABS *characteristics of employment*; *Labour Force Australia*, Detailed Quarterly.

In which industries do self-employed workers work?

The construction industry has long dominated the number of self-employed workers (with no employees of their own) due to the prevalence of this type of work arrangement in the licensed construction trades (electricians, plumbers, carpenters, builders and others) (chart 7). In February 2018, 273,000 construction workers were self-employed, accounting for around 20% of all self-employed workers and 23% of all construction workers (chart 8). Other industries with large numbers of self-employed workers include professional services (legal, accounting, engineering and design services), agriculture (farming and fishing), administrative services (employment, travel, building maintenance, gardening and cleaning services), personal services (e.g. repairs, mechanics, dry-cleaners, hairdressers, beauticians, brothels, funerals) and healthcare services.

On a proportional basis, agriculture has the highest rate of self-employment, at 35% of all workers, although the number and rate of self-employed workers in this industry has come down over the past three decades. Administrative services, construction and personal services also have relatively high rates of self-employment, at 21 to 26%.

Chart 7: Number of self-employed workers* by industry, 1991 to 2018

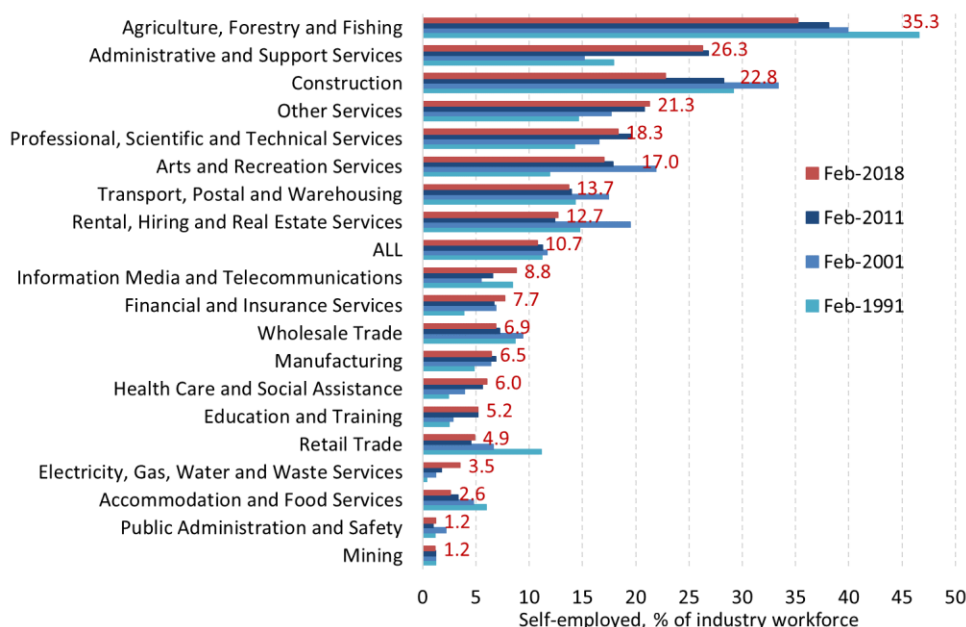


Self-employed workers with no employees in transport, postal and warehousing services (including traditional truck drivers, taxi drivers and couriers as well as drivers and riders for the likes of Uber and Deliveroo) increased by around 20,000 people (and 20%) over the four years to 2018 (to 100,000). Total employment in this industry has also increased over the four years to 2018, up by around 72,000 and 12% to 650,000. The proportion of workers in this industry who are self-employed has remained constant over the past decade, at around 13-14%, and roughly back to where it was in the 1990s after rising to almost 20% of the industry in the early 2000s.

At the other end of the scale, industries dominated by small numbers of very large businesses have the lowest numbers and rates of self-employment, most notably in mining, utilities and public

administration. The steep decline in self-employed workers with no employees in retail trade – from around 12% of the industry’s workforce in 1991 to 5% in 2018 - is indicative of the relative decline of very small shops and the rise of supermarkets and larger chains over a long period.

Chart 8: Proportion of self-employed workers* by industry, 1991 to 2018



* owner/managers of enterprises with no employees. Source: *Labour Force Australia, Detailed Quarterly*.

Who are Australia’s self-employed workers?

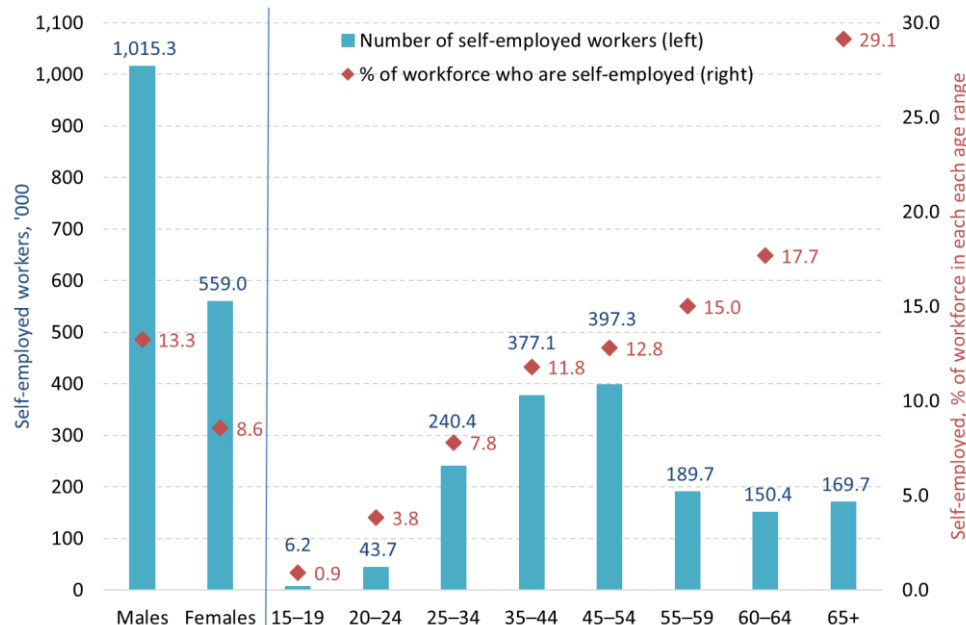
As with casual workers, the demographic profile of Australia’s self-employed workers (with no additional employees) tells a life-cycle story, but also an industry structure story. High rates of self-employment in the (male-dominated) construction industry are mirrored in the relatively high rates of self-employment for males (13.3% of all male workers) and older workers (chart 9).

Self-employment is a popular ‘aspirational’ career choice among many Australians, rather than an insecure or sub-optimal form of work. Research published by NAB economics in 2016 indicates that up to **one in three** Australians aspire to self-employment or want to set up their own business. Self-employment goals are highest among young men (chart 10), with the NAB reporting that:

“By age, almost 1 in 2 young Australians (18-29) said they would rather start their own business, compared to 39% of middle-aged Australians (30-49) and 19% of over 50s. In contrast, nearly 1 in 2 over 50s said they would prefer to work for someone else, compared to 38% of young Australians and 40% of 30-49 year olds.

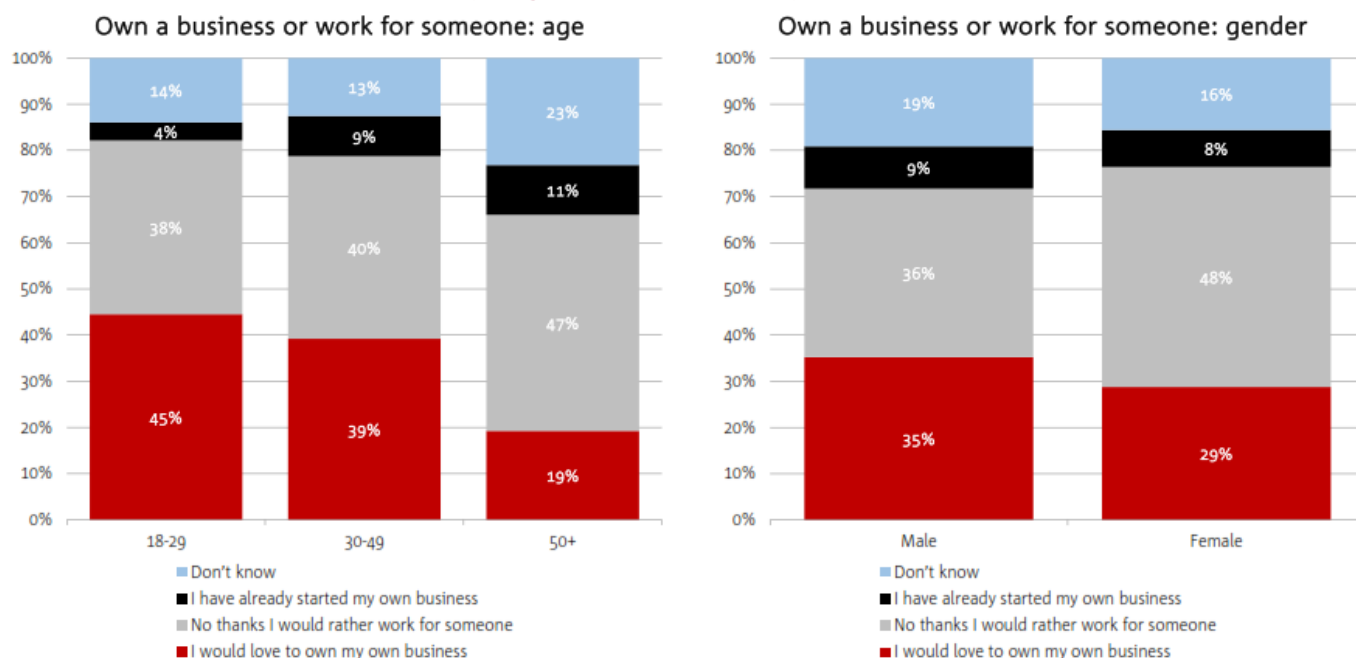
By gender, men (35%) were somewhat keener to start their own business than women (29%). In contrast, a much higher proportion of women - almost 1 in 2 - said they would prefer to work for someone else, compared to just 36% of men. This may reflect greater concern among women in having continuity of employment post childbirth and the loss of potential maternity benefits.”

Chart 9: Number and proportion of self-employed workers*, by sex and age, August 2017



* owner/managers of enterprises with no employees. Source: ABS *characteristics of employment*, 2017.

Chart 10: Prefer to start your own business or work for someone else? by age and sex, July 2016



Source: NAB 2016, *The Lure of Entrepreneurship*, p. 2.

3. Part-time work

Casual work is often confused with part-time work. These are not the same thing, although they do overlap somewhat. ‘Casual’ work usually refers to the employment contract or relationship, while ‘part-time’ work only refers to the *number of hours*. In the ABS labour force data for Australia, part-time work is defined as any paid work of less than 35 hours per week (including by employees, self-employed workers or employers).

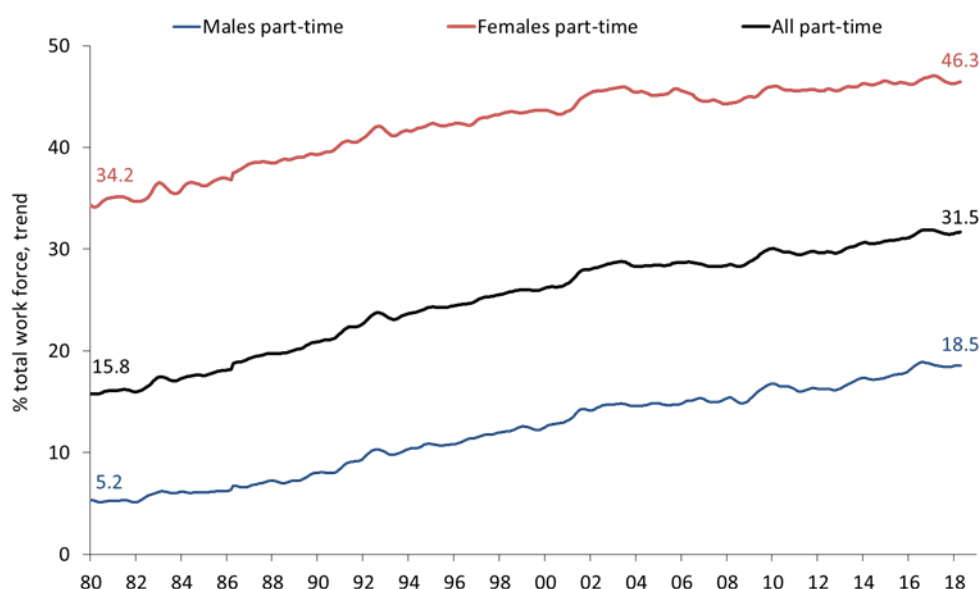
The number of hours worked by part-timers can vary greatly between individuals and over time. All Australian part-time workers worked an average of 17 hours per week in 2017.¹

How many part-time workers?

Although the proportion of casual work has not changed over the past two decades, the proportion of part-time work has increased steadily since at least the 1980s (these data commence in 1978). Part-time work has a strong gender element to it in Australia, since many more women work part-time (46.3% in April 2018 and over 45% since 2009) than men (18.5% in April 2018) (chart 11).

This has meant that the strong rise in female workforce participation in recent years (to a record high of 60.6% of all adult women in April 2018) has contributed to the rise in part-time work. Abstracting from this however, it is clear that the rate of part-time work has grown for both men and women as well as for the whole population since the 1980s (chart 11).

Chart 11: part-time work rates by sex, 1980 to 2018



Source: ABS *Labour Force Australia, Detailed Quarterly*.

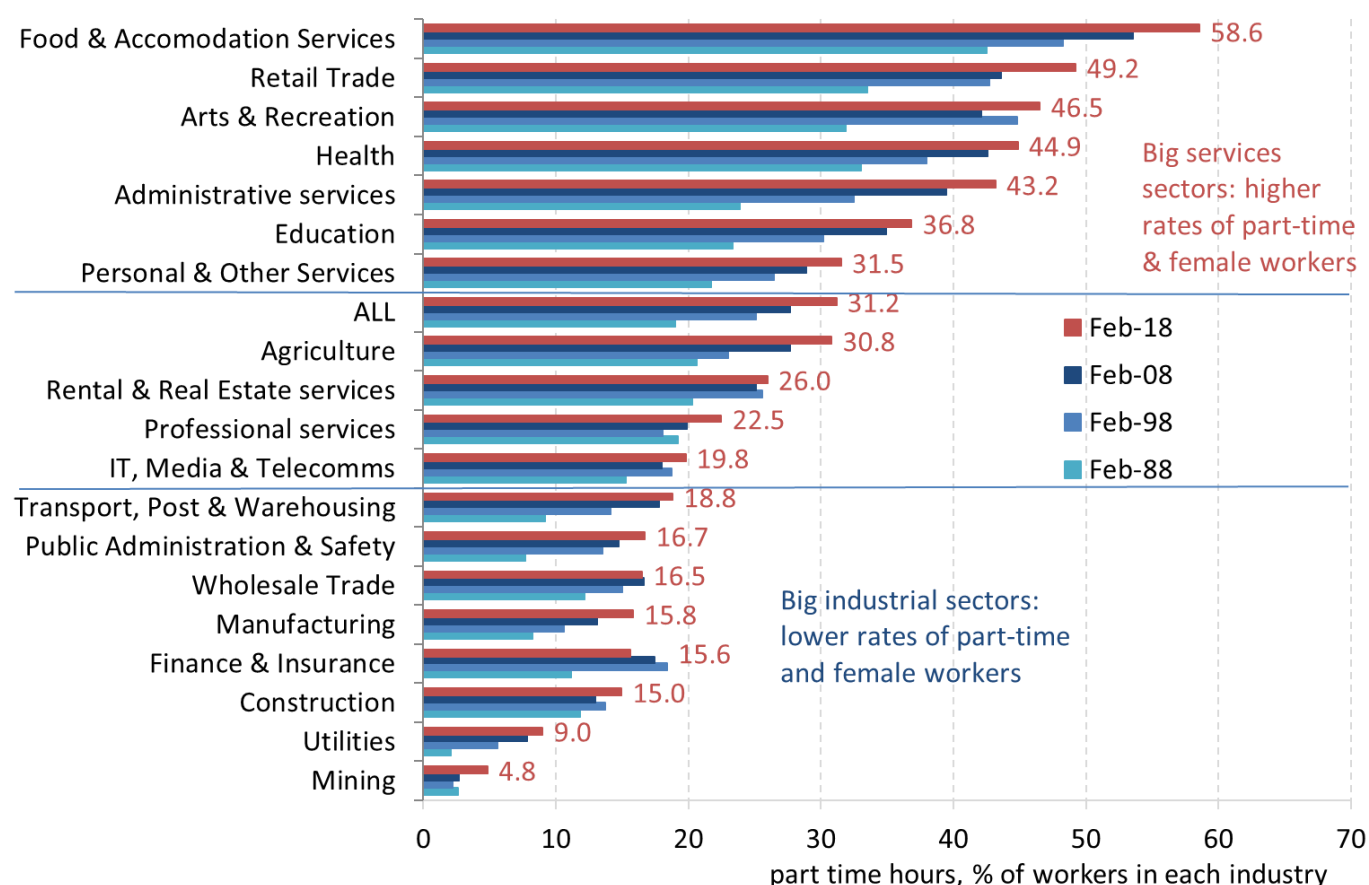
¹ Cassidy N. and Parsons, S. 2017, “The rising share of part-time work”, *RBA Bulletin*, September Quarter 2017.

Which industries employ part-time workers?

This rise in part-time work is happening for a variety of reasons on both the demand side (employer-driven) and supply-side (employee driven) of the labour market. On the supply side, structural changes across the economy have seen Australian employment grow more strongly in services industries that can offer workers a greater range and choice in work hours (such as healthcare, professional services, retail and hospitality) (chart 12). These industries typically offer more part-time work than the more traditionally ‘full-time’ industrial sectors and have proven to be especially attractive to female and older workers; not coincidentally, the industries with higher rates of part-time work (and more flexible work hours) also have higher rates of female workers.

Even within these services sectors however, the share of part-time work has grown over the past two decades (chart 12). The Reserve Bank of Australia (RBA) has identified developments such as: new medical technologies, communications technologies and changes in shopping and entertainment hours as contributing to this shift towards shorter work hours.

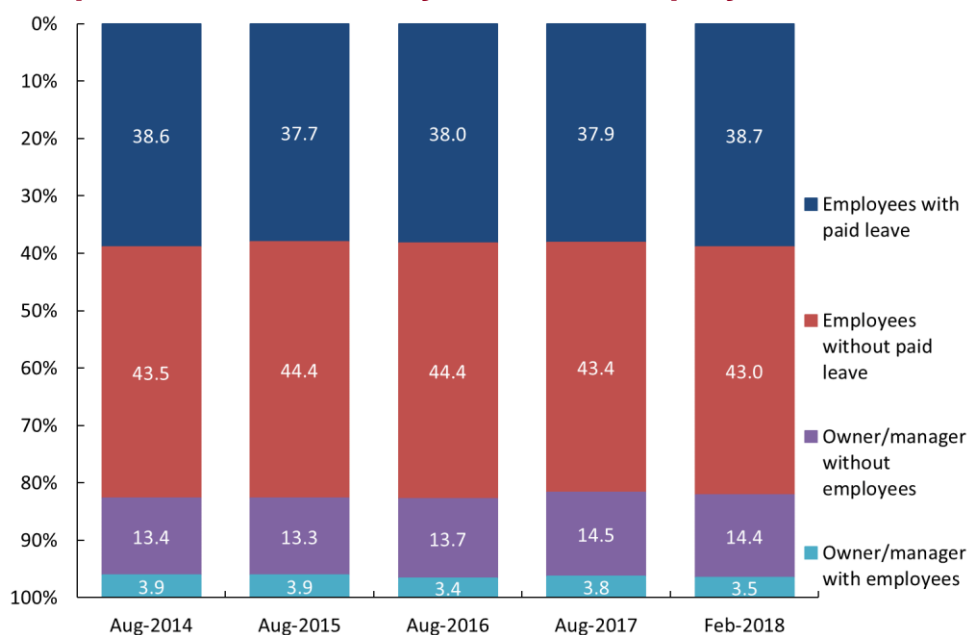
Chart 12: part-time work rates by industry, 1988 to 2018



Looking more closely at this (growing) category of part-time work, there has been no apparent increase in the proportion of part-time workers who work on a casual or self-employment basis. Comparable data at this level of detail are readily available for Australia’s national workforce from 2014. This indicates that in February 2018, 43.0% of part-time workers were employees with no

leave entitlements (i.e. ‘casual’ employees), which is about the same proportion as in August 2014 (43.5%) (chart 13). The proportion of part-time workers who are owner/managers with no employees (i.e. ‘self-employed’) is also about the same, at 14.4% in 2018 and 13.4% in 2014. This is a relatively short time period however, and cannot reveal any longer-term structural changes that may have occurred over the past two decades or longer (e.g. due to demographics).

Chart 13: part-time workers by status in employment, 2014 to 2018

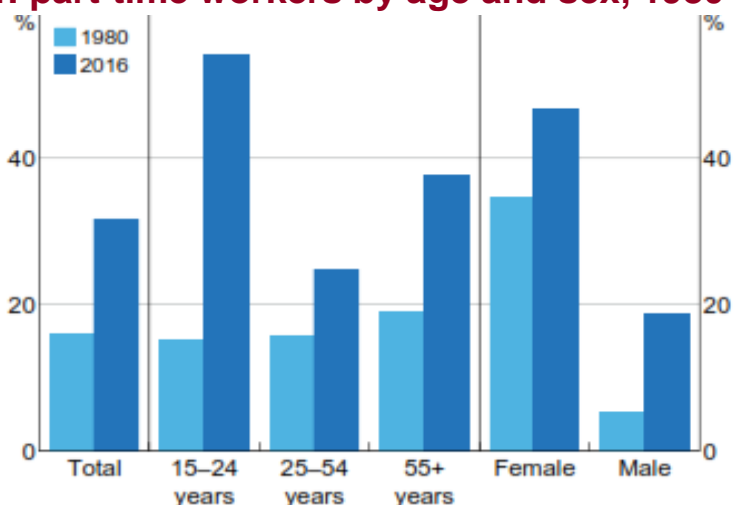


Source: ABS *Labour Force Australia, Detailed Quarterly*.

Who are Australia's part-time workers?

As noted above, part-time work overlaps with – but does not equal – casual work. As for casual work however, part-time work rates are highest among female and younger workers (chart 14).

Chart 14: part-time workers by age and sex, 1980 and 2016

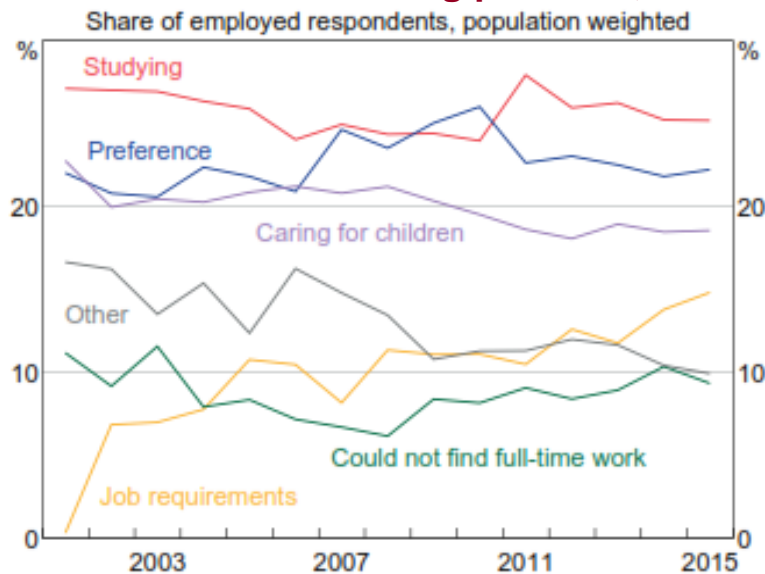


Source: ABS and RBA.

Why do so many Australians work part-time?

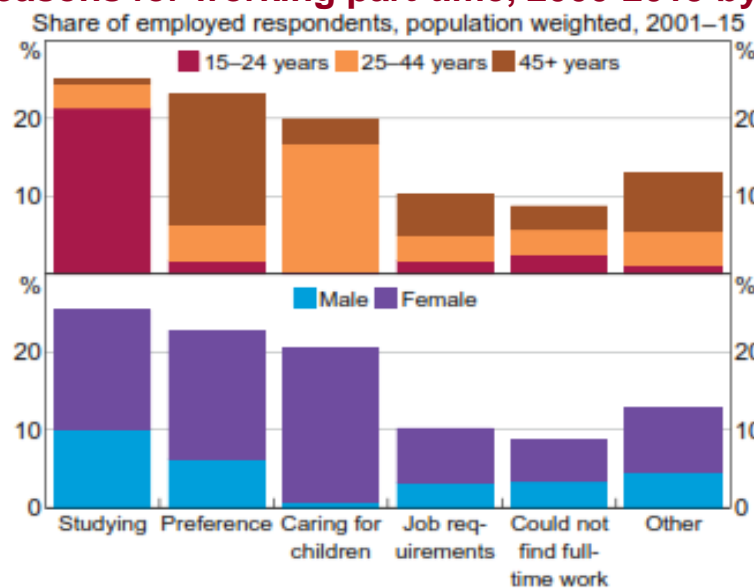
This demographic profile helps to shed light on the supply-side (employee-driven) reasons for relatively high and increasing rates of part-time work. Recent RBA analysis of HILDA data indicate that the reasons that women and younger people are more likely than others to work part-time include: study, family commitments and personal/lifestyle preferences (charts 15 and 16).

Chart 15: reasons for working part-time, 2000-2015



Sources: RBA and HILDA.

Chart 16: reasons for working part-time, 2000-2015 by age and sex



Sources: RBA and HILDA.

For workers aged 15-24 years, ‘studying’ is the single most common reason to be working part-time. The RBA notes that education participation has increased dramatically in Australia over the past two to three decades, with over half of all 15-24 year olds enrolled full-time in education by 2015, compared to 20% in the 1980s. This increase in education participation represents a real improvement and contribution to individual – and national – productivity and lifetime earnings.

Another factor that is relevant to this younger group of workers over this period is the strong rise in the number of international students based in Australia. This has further boosted the education participation rate for this age group, as well as increasing the sheer number of young students relative to the size of the total Australian workforce. The Australia Institute recently estimated that as of 2017:

“Counting foreign students, working holiday makers, and temporary migrant workers under 457 visas (now called “Temporary Skill Shortage” visas), there were close to 900,000 temporary migrants with work privileges in Australia in 2017. That represented an increase of 40 per cent in the previous five years – led by an 80 per cent increase in foreign students [to more than 600,000 international students in 2017]. These three categories of temporary migrant alone represent a potential pool of labour equal to 7 per cent of Australia’s labour force [in 2017].”²

Most international students in Australia have visas that allow them limited work rights while they are studying. One of their visa conditions is a maximum of 20 hours work per week. This effectively limits them to part-time work only, if they are to abide by the legal conditions of their visa and (as for Australian resident students) allow sufficient time to complete their studies. This large increase in international student numbers is therefore adding significantly to the pool of labour seeking *only* part-time work, in absolute numbers and as a proportion of the total Australian workforce.

Among older Australian workers, caring for children is the main reason for ‘prime working age’ women (25-55 years) to work part-time. For those aged over 55 years, the ageing population and Australia’s retirement policies have become highly relevant to individuals’ work preferences. For both men and women, the RBA notes that:

“Relative to other age groups, older workers (particularly those aged 55 years and over) have the strongest preference for working part-time hours. It may be that older workers take on a part-time job (and, increasingly, casual arrangements) as a transition between the role they had for most of their working life and retirement. Older workers also cite caring for relatives and illnesses or disabilities as reasons for working part time. In addition, an older worker’s decision to work part-time hours can be influenced by access to, and the level of, pensions and superannuation.”³

Most of these reasons indicate that part-time work is an active choice on the part of the employee. Unfortunately, an average of 10% of part-time workers from 2000 to 2015 said they worked part-time because they could not find full-time employment. A further (rising) share said that they

² Carney, T. and Stanford, J. 2018, *The Dimensions of Insecure Work: A Factbook*, the Australia Institute.

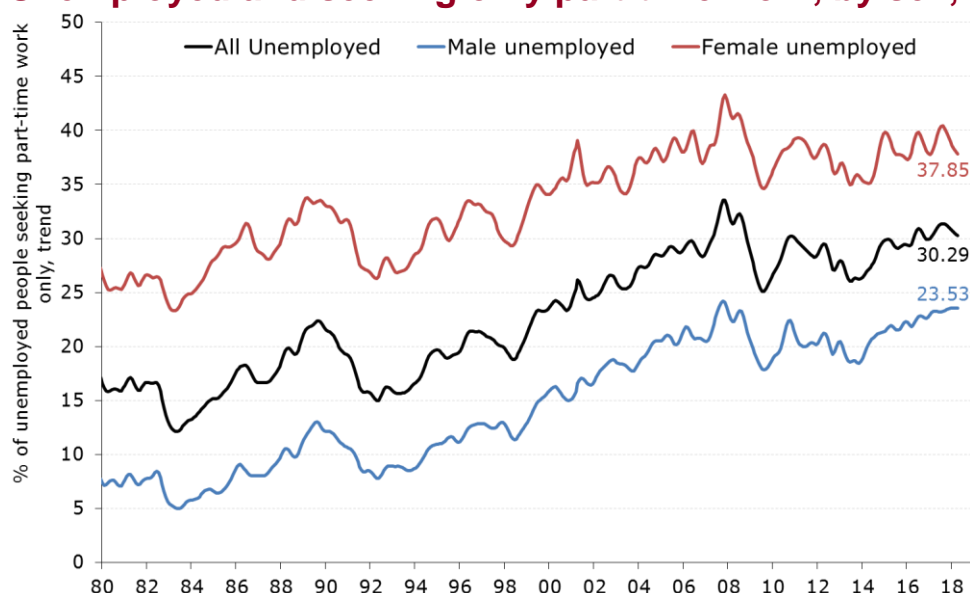
³ Cassidy N. and Parsons, S. 2017, “The rising share of part-time work”, *RBA Bulletin*, September Quarter 2017.

worked part-time because it was ‘a requirement of the job’. Depending on whether these workers were willing and able to work more hours or actively seeking more work, this sub-set of about 25% of part-time workers can be classified as ‘involuntary’ or ‘under-employed’ part-time workers.

This is consistent with ABS labour force data which indicates that around 25% of part-time workers – or 8% of the total labour force – are ‘under-employed’ at any given time (that is, working part-time but willing and able to work more hours). This mismatch in work hours preferences indicates an element of involuntary underutilisation (or ‘spare labour capacity’) among these workers. More positively, these data confirm that the majority – at least 75% - of part-time workers are not seeking full-time work or more work hours and are hence content with their work hours.

Another important clue to changes in work hours preferences lies in Australia’s unemployment data. Among those who are unemployed (that is, without paid work but actively seeking work), around 30% have been *only* seeking part-time work since 2015 (chart 17). Among unemployed women, 38% are seeking only part-time work, as are 24% of unemployed men, as of April 2018. The proportions of unemployed people seeking only part-time work has risen (rather unsteadily) over a very long period of time and are surprisingly close to the proportions of the workforce that are actually working part-time, for both men and women. This suggests that some important - and very widespread - long-term demographic, structural and socio-economic factors are encouraging more people across the community to actively seek out part-time work.

Chart 17: Unemployed and seeking only part-time work, by sex, 1980-2018



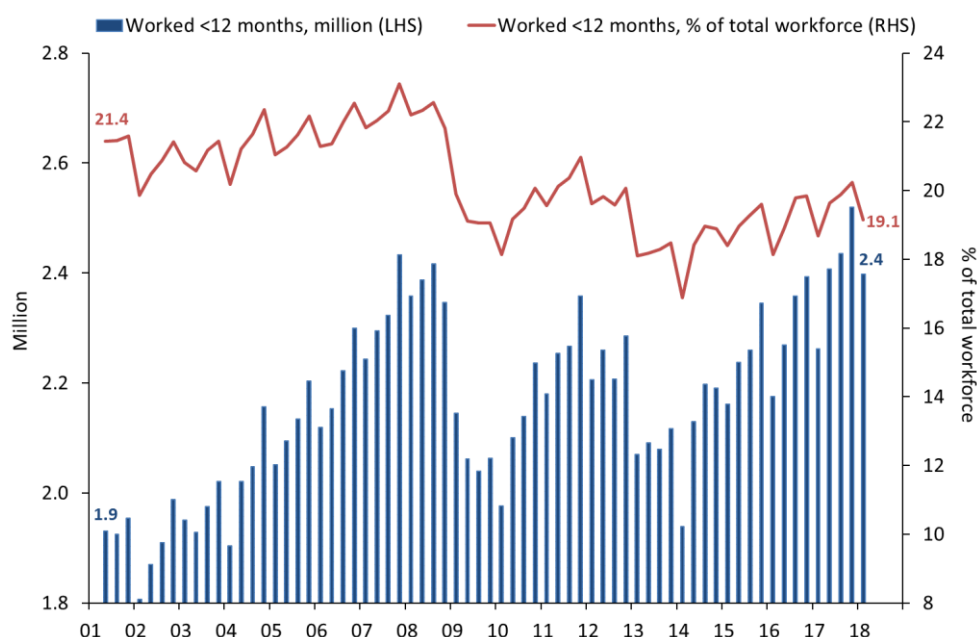
Source: ABS *Labour Force Australia*, April 2018.

4. Job tenure

Casual work (and even part-time work) is often assumed to be ‘insecure’ or ‘temporary’. Work insecurity however, can also arise from frequent changes of employment and/or very short durations of employment, rather than the nature of the work relationship or the number of hours being worked. Comparable data about people in work for less than 12 months are readily available for Australia’s national workforce from 2001 (more detailed data on job tenure are available for selected years from the annual ABS publication ‘*characteristics of employment*’).

As with the trends in casual employment described above, the story seems to be that the number of people in short-duration work has grown, but their ‘incidence’ (proportion of the workforce) has not. In February 2018 (latest data available), 2.4 million workers had been in their current job or business for less than 12 months (19.1% of the total workforce), compared to 1.9 million workers in 2001 (21.4% of the workforce) (chart 18). Over this century, the proportion of the workforce who have been with their current employer for less than 12 months fluctuated from a low of 16.9% in February 2014 to a high of 23.1% in November 2007, coinciding with the aftermath of the GFC.

Chart 18: Number and proportion of workers who have been with their current employer or business for less than 12 months, 2001 to 2018

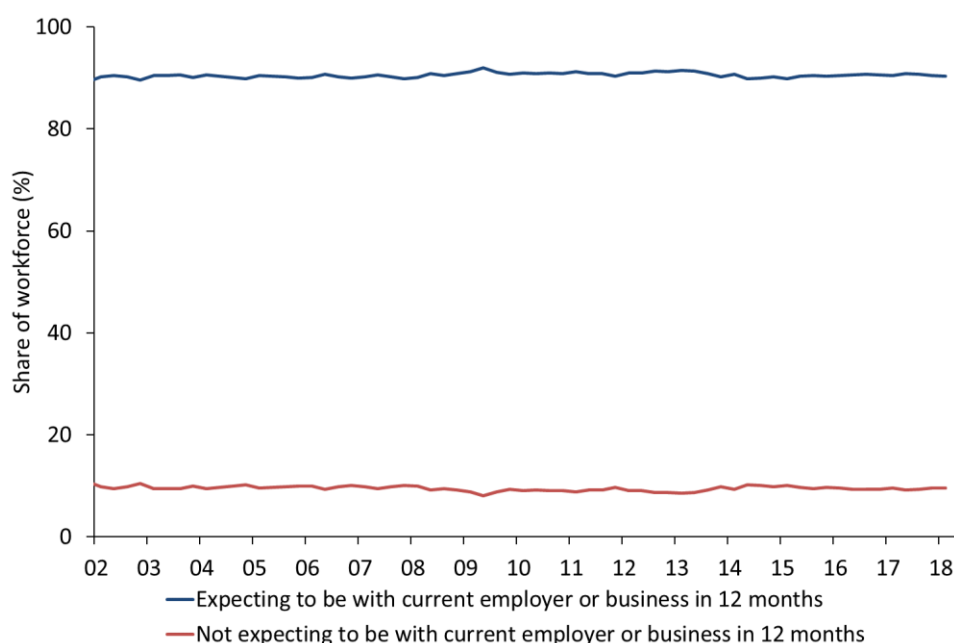


Source: ABS *Labour Force Australia, Detailed Quarterly*.

5. Expectations of job tenure

In addition to measuring actual job tenure, the ABS asks workers about their expectations of future employment with their current employer or business in 12 months' time, and if not, why not. In February 2018, 11.3 million of the 12.5 million workers in Australia – or more than 90% - expected to be working with their current employer or business in 12 months' time. This proportion has not changed significantly since this data series began in 2001 (chart 19).

Chart 19: Workers' employment expectations in 12 months, 2001 to 2018



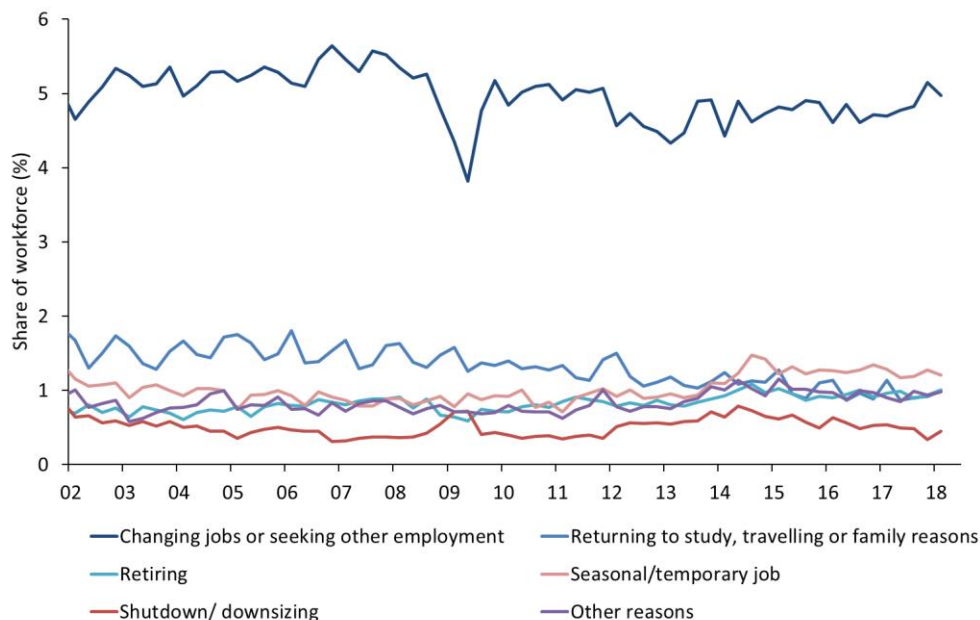
Source: ABS *Labour Force Australia, Detailed Quarterly*, Feb 2018

Of the 10% of workers that do expect to leave their job in the next year, about half are leaving in order to change jobs or seek other employment (chart 20), that is, they plan to leave for voluntary and career-advancement reasons of their own.

Only 1.2% expect to leave their current employer within 12 months because of seasonal arrangements and 0.5% because of downsizing or the business shutting down. The share of the workforce expecting to leave their current employer in the next year because of seasonal arrangements is the same as it was in May 2001, as is the share of workers expecting to lose their current job in the next year due to shutting down/downsizing (0.6% in February 2002 and 0.5% in February 2018).

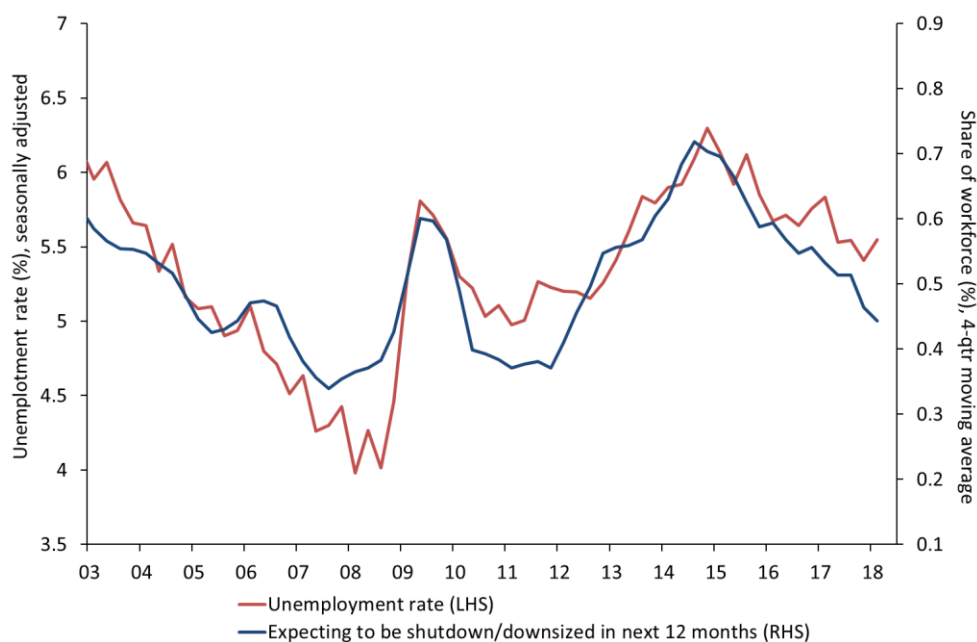
Workers' expectations of losing their job in the next 12 months tends to move in line with labour market conditions and to that extent, it does not appear to be misguided or 'irrational'. Indeed, the share of workers expecting to lose their current job within the next 12 months is very closely aligned with the unemployment rate, and may even help to predict it (chart 21).

Chart 20: Reasons for not expecting to be with current employer or businesses in 12 months, proportion of total workforce, 2001-2018



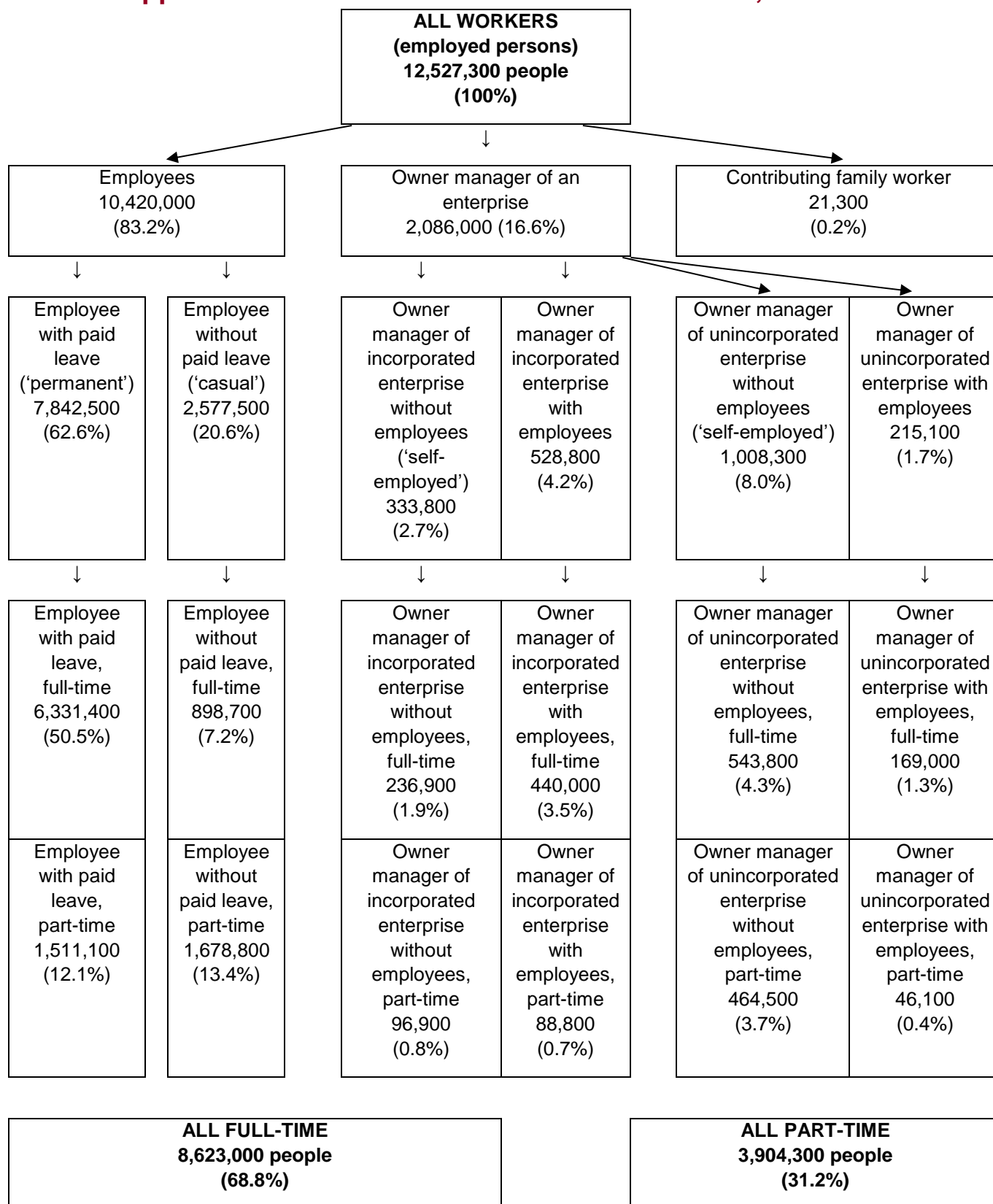
Source: ABS Labour Force Australia, Detailed Quarterly, Feb 2018

Chart 21: Unemployment rate and proportion of workers expecting to be shutdown/downsized in the next 12 months, 2003 to 2018



Source: ABS Labour Force Australia, Detailed Quarterly, Feb 2018.

Appendix: Structure of the Australian workforce*, Feb 2018



* Original, unadjusted data. Source: ABS *Labour Force Australia, Detailed Quarterly*, Feb 2018.

Data and references

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