



Reset, Restore, Reframe – Making Fair Work FlexWork

A Deloitte and Swinburne Edge Report

June 2022



Executive summary

The pandemic significantly disrupted work patterns and worker expectations across Australia, leading to dramatic changes in where, when, and how we work. Profoundly, two new classes of workers have emerged in Australia for the first time.

Flexible location workers are those whose work is no longer location dependent. They have some choice over when and where they work. On the other hand, onsite workers are required to perform their work at their employer's workplace or a specific work site. While onsite workers have some benefit of flexibility around when they work, most do not. And onsite workers have little freedom to decide where they work. But all workers increasingly want and expect some level of flexibility around both where and when they work. This Deloitte and Swinburne Edge research shows four main flexible working challenges facing employers:

- i. First, the leading motivation for flexibility for workers, both flexible location and onsite, is that they expect better work-life balance and wellbeing outcomes. Signs of increasing workloads and burnout are clear.

The situation has become so serious that, for the first time, workers rate wellbeing as being equivalent to pay as the leading benefit from working. This is a remarkable result, especially given the current record low wage growth.

Workers see flexible working as enabling their wellbeing. This is a critical connection employers must not ignore, especially when framing remuneration and benefit packages, whether it be to retain existing employees or attract new ones. Wellbeing can't be written into work agreements, but flexible working – as the key enabler of wellbeing – can.

- ii. Second, organisations need to heed their employees' concerns about unsustainable workload and aspirations for better work-life balance. Flexible working is becoming the new normal for flexible location workers and organisations need to transform their employee value proposition around flexibility. Onsite workers are also watching closely.

Pay and traditional job factors – like career progression, learning opportunities and finding purpose in doing meaningful work – are still important, but they must now be paired with flexible working options and the benefits this affords. Think wellbeing, work-life balance, and worker autonomy. And workers must be set up to succeed: supported by the technology and workplace design that enables them to work and collaborate effectively across remote, hybrid, and workplace settings.

- iii. Third, like most revolutions, existing regulations have not evolved at the same pace. Our Fair Work System is not equipped to enable this employee-led flexible working (FlexWork) revolution. The premise of the Fair Work System is that it compensates workers through measuring their work time performed at a workplace. Workers who increasingly work remotely and outside set standard work schedules for life choices will not find these highly valued elements protected by the Fair Work System in the way their hourly rates of pay are enshrined.

There is evidence employers are not appropriately compensating employees who legitimately perform extra hours. Yet the same Fair Work System obliges additional compensation for workers who choose to work outside their standard hours because of their preferences.

This is significant. Since the pandemic, a third of both flexible location workers and onsite workers are working more hours. And more than half are working frequently outside their standard hours to get their work done. It is not clear whether employers understand when or how often extra or non-standard hours are being worked, or why, raising significant compliance challenges and questions about employee engagement and health and safety obligations.

The dilemma emerging is that the Fair Work System is not effectively protecting flexible location workers' pay or their choices while employers are left exposed to penalties for non-compliance as more and more workers expect and will self-direct non-standard working hours that suit them.

- iv. Finally, to avoid talent being a transactional proposition between pay and flexible working benefits, employers must renew their focus on employees' connection with the organisation: a team and organisational culture based on developing trust and fostering a sense of belonging and meaningful collaboration.

The flexibility divide between flexible location workers and onsite workers is already emerging. How can employers offer the benefits of flexible working to both their flexible location workers and onsite workers and avoid dividing their workforce? Employers must push ahead with new ways of working for their flexible location workers while beginning to engage their onsite workers and start defining what and how flexibility could work for them.

After two years of pandemic work, workers are demonstrating they can be trusted to both work flexibly and get their work done. It is now time for employers to respond with a FlexWork value proposition that respects and empowers employees and makes flexible working more sustainable for everyone.

Contents

Executive summary 2

Introduction 4

About this survey 5

Survey snapshot..... 6

Section 1: Reset 7

1.1. Disruption, job security, and job mobility during the pandemic 7

1.2. Work-life balance in pandemic life..... 8

1.3. Working more hours 8

1.4. Work outside standard hours 8

1.5. Non-standard and extra hours: Choice, compensation and compliance..... 12

1.6. From forced WFH to choice in location: The experience of flexible location workers 14

Section 2: Restore 15

2.1. Work-life balance is no longer a nice-to-have 15

2.2. Workers want flexibility in where they work 15

2.3. For flexible location workers in the year ahead: more home, more hybrid, less office 16

2.4. FlexWork delivers a wellbeing dividend 18

2.5. Importance of flexible working compared to with other benefits 19

Section 3: Reframe 20

3.1. What’s FlexWork worth? 20

3.2. Putting a dollar value on FlexWork 21

3.3. Enabling FlexWork: Employer policies 22

3.4. Flexibility reframed 22

3.5. Inclusive work practices in a hybrid world 23

Section 4: The road ahead: can we make FlexWork work for us all? 24

Glossary..... 26

References and resources 27

Methodology 28

Authors 29



Introduction

Workers across Australia are exhausted. Many have experienced prolonged disruption and serious job and income insecurity concerns because of the global COVID-19 pandemic and associated government imposed restrictions.

- Personal lives have suffered as people juggle work and home commitments in the face of long-term uncertainty.
- Workers are adjusting their expectations from 'post-COVID' to 'working with COVID' now that we are in a post-vaccine world.
- Despite constraints, all workers have been incredibly resourceful in making work, work.
- Flexible location workers – those who have experienced working from home – are not interested in being told by their bosses that it's time to go back to normal. To expect so is a failure to respect workers' experience. There has been a monumental shift in mindset, priorities, and expectations. These workers expect to be involved in and engaged about decisions concerning their work, including where and how to work. Workers have shown they can be productive while working remotely and autonomously during the pandemic and are now looking to permanently entrench these greater levels of flexibility into their work.
- At the same time, people's lifestyles have changed. They're far more invested in their home life than before. People like being able to work from home and many have relocated to suit their lifestyle needs. Workers want flexible work options not just for managing life, but for enjoying it too.
- By contrast, onsite workers have been required to attend their workplace, especially frontline workers. Often unnoticed and unappreciated in normal times, they kept the economy going and protected and saved thousands of lives, risking their own health in the process.

- Work-life balance for onsite workers has been significantly impacted. This is particularly concerning given that many onsite workers are shift workers, required to work unsociable times throughout the week.
- As a society we have better recognised these workers as essential and celebrated their efforts. While they have fewer flexible working opportunities, their expectations for it are, understandably, rising.
- Having flexibility in when and where we work has been hotly debated for decades, but only actively experienced over the last two years. While there have been pockets of flexible working in Australia (primarily for knowledge workers in response to restrictions), it has not been widespread. We are still experimenting with flexibility in the face of potential further variants and outbreaks.

Work and life have not been in balance. Traditional boundaries between work and life – such as the commute or set work patterns each week – have faded for many. We need to reset our idea of normal work to be flexible work. We need to restore worker wellbeing and bring workers back from the brink of burnout. Organisations need to reframe their flexibility value proposition to reflect an understanding of what's important to workers.

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About this survey

This research was jointly led by Deloitte and Swinburne Edge (“we”) and conducted by YouGov Australia. The survey was conducted online over a two-week period in late January 2022. Together, we surveyed more than 2,000 Australian workers about hybrid work, their experiences of work during the pandemic and the importance of flexibility. More information about the methodology of the survey is contained in the Methodology part of this report.

In this survey, we distinguished flexibility of workers based on the location of their work. We asked respondents whether their work required them to be onsite at their employer’s (or a client’s) workplace. **Onsite workers** are those whose work requires them to be onsite, at their employer’s workplace or a client’s site. **Flexible location workers** are those whose work does not require them to be onsite and they have the option or opportunity of working remotely.

Overall, flexible location workers make up approximately 43% of the working population (as estimated by YouGov), compared to 57% of onsite workers. Unless otherwise stated, all statistics set out in the report relate to the surveyed population. We worked with our survey partner YouGov to ensure both cohorts in the sample (flexible location and onsite) are representative of these workers across the economy. As such, we have confidence in extrapolating from the survey results to the respective population across Australia – that is, flexible location workers and onsite workers.

We surveyed workers across all industries, including retail, banking and finance, health services and pharmaceuticals, construction, education, and IT telecommunications.

The survey explored several unique focus areas:

- Measuring flexibility in the time of Omicron.
- Comparing Australian workers who have access to working flexibly with those who don’t.
- Breaking down flexibility into its two main components:
 - i. the where and the when.
 - ii. the flexibility experience and expectations of workers in each cohort.
- Valuing flexibility in terms of traditional work incentives like pay and leave.
- Identifying the implications of flexibility for our Fair Work System, with a focus on presumptions that no longer hold true.



Survey snapshot

Our research shows big shifts in employee expectations and values coming out of the pandemic. There are some stark distinctions between the experience and preferences of **flexible location workers** and **onsite workers**.

Wellbeing

93% of workers say their physical, emotional and mental wellbeing is just as important as pay.

Location of work

Four in five flexible location workers want to work hybrid or from home. While onsite workers cannot work hybrid, two in five want to.

Hours of work

One in three workers are working more hours since the pandemic (34% of flexible location workers, 32% of onsite workers).

More than half of employees are working outside standard hours at least once a week (60% of flexible location workers, 52% of onsite workers).

41% of flexible location workers decide their own work patterns compared with **15%** of onsite workers.

Flexibility or pay

Close to **two in three** workers would be prepared to forgo a pay rise for more flexibility, with **one in five** saying they would forgo between 6% and 10% of their salary.

Compensation

28% of flexible location workers are not compensated for time worked outside standard hours, compared with **16%** of onsite workers.



Section 1: Reset

1.1. Disruption, job security, and job mobility during the pandemic

2020 was about keeping our jobs.

With the onset of the pandemic in 2020, and the first lockdowns placing severe restrictions on individuals and workplaces, unemployment in Australia was projected to reach double digits. Workers were rightly worried. Many took pay cuts, were made redundant or stood down, and were supported financially by government programs like JobKeeper. Fear characterised the nation's mood. Beyond the fear for our health, we also feared a global recession which came to pass in many countries, including Australia in the latter part of 2020. This was reflected in the historically low job mobility of only 7.5% in 2020. Millions of workers were in day-to-day survival mode, particularly those in less secure working arrangements, such as casual workers.

Job mobility surged in 2021

The economy went into recession in 2020 for the first time in nearly 30 years. In 2021, it began performing better and rebounding more quickly than most expected. Life after COVID-19 seemed to be a real prospect. With international borders closed throughout 2021, demand for labour rose. The mood lifted, and confidence began to return. Many workers began to take advantage of better labour market conditions, seeking a better job or more work.

Our research indicates that a third of workers have changed jobs since the pandemic. Mobility was more common for flexible location workers over this period (37% compared to 30% of onsite workers). ABS data for the period ending February 2021 reinforces this surge in mobility, with 1.3 million people (or 9.5% of employed people) changing jobs, the highest annual job mobility rate since 2012, up from 7.5% for the period ending February 2021.

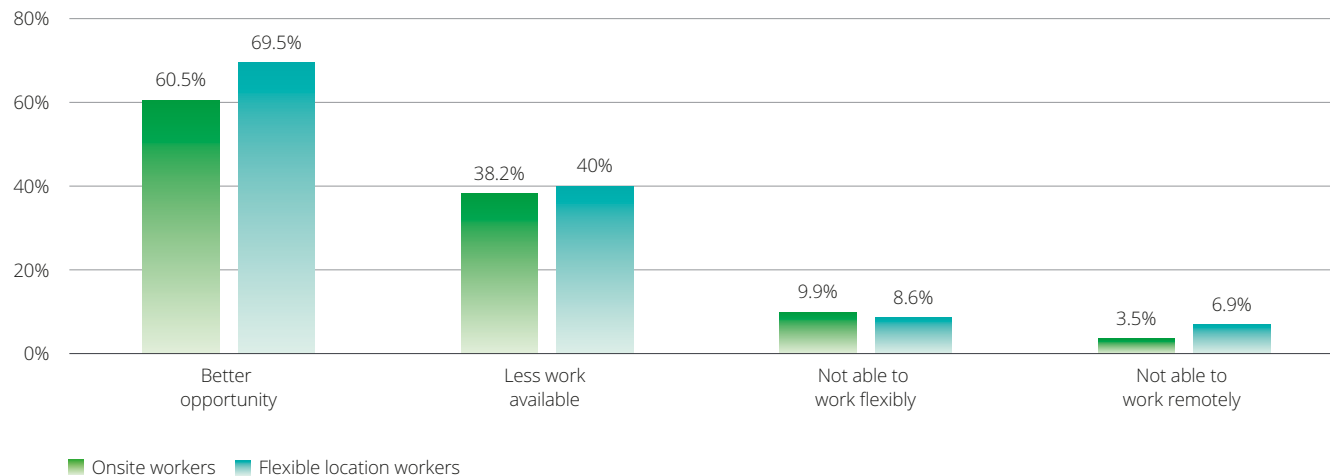
Motivations for changing jobs

Most workers cited better opportunities (61% of onsite workers, 70% of flexible location workers) as the main reason for changing jobs. That is, they were 'ready for a different job, or a better job came along'.

The next most common reason for changing jobs was because their work was impacted by the pandemic (38% of onsite workers, 40% of flexible location workers).

Flexible working began to register as a motivator for 10% of onsite workers and 9% of flexible location workers.

Reason for changing jobs since pandemic



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 Most workers cited better opportunities (61% of onsite workers, 70% of flexible location workers) as the main reason for changing jobs.

1.2. Work-life balance in pandemic life

This research sheds light on several indicators of work-life balance during the pandemic: patterns of working hours, how these are determined, and the extent to which they fall outside 'standard' hours of work. Some clear distinctions emerged between flexible location and onsite workers.

1.3. Working more hours

Many workers told us that since the pandemic began, they have been working more, and most are frequently working non-standard and extra hours.

While half of Australian workers are working the same hours as before the pandemic, around a third are working more. It is slightly higher for flexible location workers (34%) than for onsite workers (32%).

17% of onsite workers are working fewer hours than before the pandemic, marginally more than flexible location workers (15%).

More than half of workers are working more than 38 hours a week.

Flexible location workers are slightly more likely to be working more hours: nearly three in five (60%) work more than 38 hours a week (54% up to 45 hours and 6% more than 46 hours).

Of onsite workers, 53% are working more than 38 hours a week (46% up to 45 hours and 7% more than 46 hours).

1.4. Work outside standard hours

An overwhelming majority of workers' standard hours are 8 am to 6 pm, comprising 63% of onsite workers and 82% of flexible location workers. For onsite workers, a quarter reported their standard hours included weekdays prior to 8 am (24%) and Saturdays (25%), with nearly one in five having standard hours that included a Sunday (19%).

Industrial relations (IR) insight: Maximum hours, standard hours, and industrial instruments.

Most employees in Australia are covered by the Fair Work System. The Fair Work System sets a maximum of 38 hours a week while also envisaging that additional hours might be worked if they are 'reasonable'. Many employees are entitled to overtime if they work more than 38 hours a week (or beyond a certain number of hours each day).

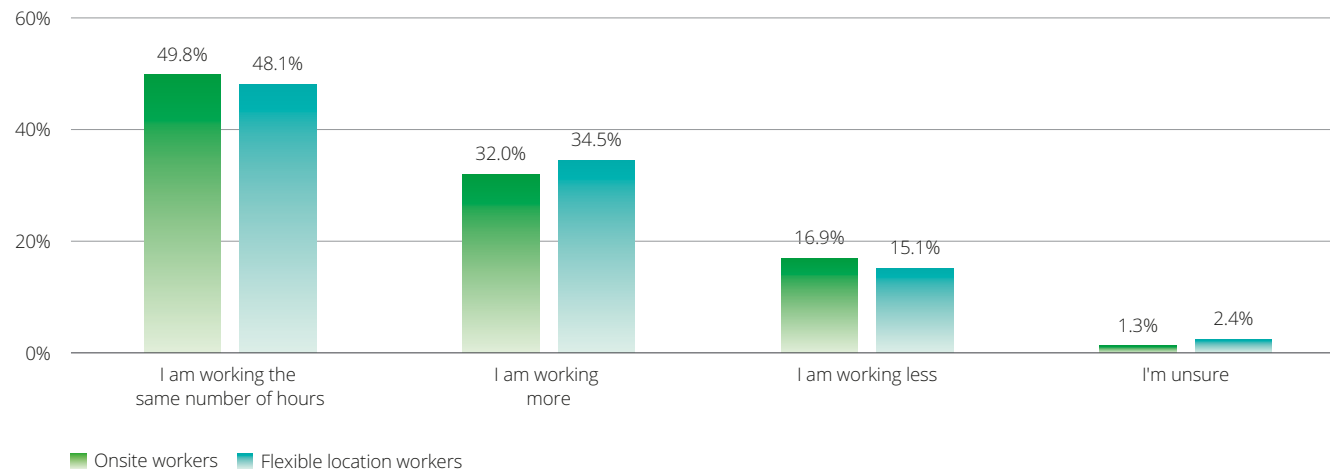
Most employees in Australia have 'standard' hours which are set in industrial instruments made under the Fair Work System, primarily modern awards and enterprise agreements. The standard hours vary depending on the instrument, custom and practice in the sector. Standard hours are generally expressed as a span of hours within which regular work occurs – for example, 8 am to 6 pm.

Simply put, standard hours provide an expectation of the normal hours within which people are expected to work.

Specific work times for many employees are managed directly, such as via rosters or set shifts. Other workers are less directed in their patterns of work and expected to do their work during certain core hours, may choose to work outside these hours.

With government imposed stay-at-home restrictions, millions of workers have had much more autonomy on when they work and could choose to work outside standard hours.

Working hours since the pandemic



What determines the actual times workers currently work?

Onsite workers are much more likely to be working hours determined by their employer and most have their hours of work set by a roster (65%) compared to flexible location workers (36%).

The remainder of onsite workers are more likely to have their hours decided by their employer (but without a set roster), their manager, or the job requirements. Only 15% are able to determine their own hours of work.

In contrast, flexible location workers are much more likely to decide their own work patterns (40%).

More than half of onsite workers (52%) and three in five flexible location workers (60%) work outside their standard hours at least once a week.

25% of flexible location workers and 21% of onsite workers work outside their standard hours more than once a week.

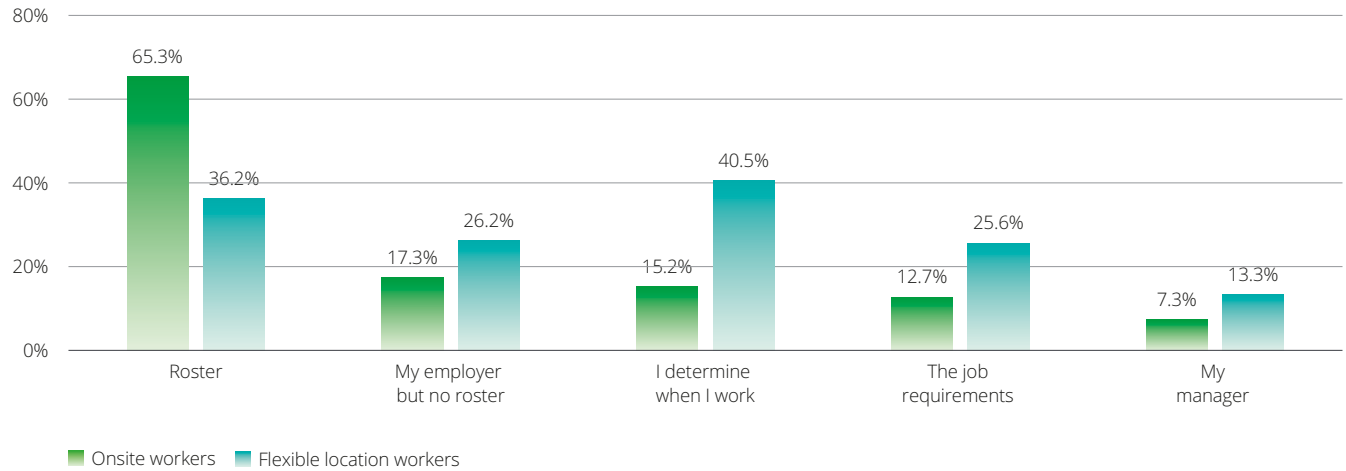
23% of flexible location workers and 15% of onsite workers work outside their standard hours daily.



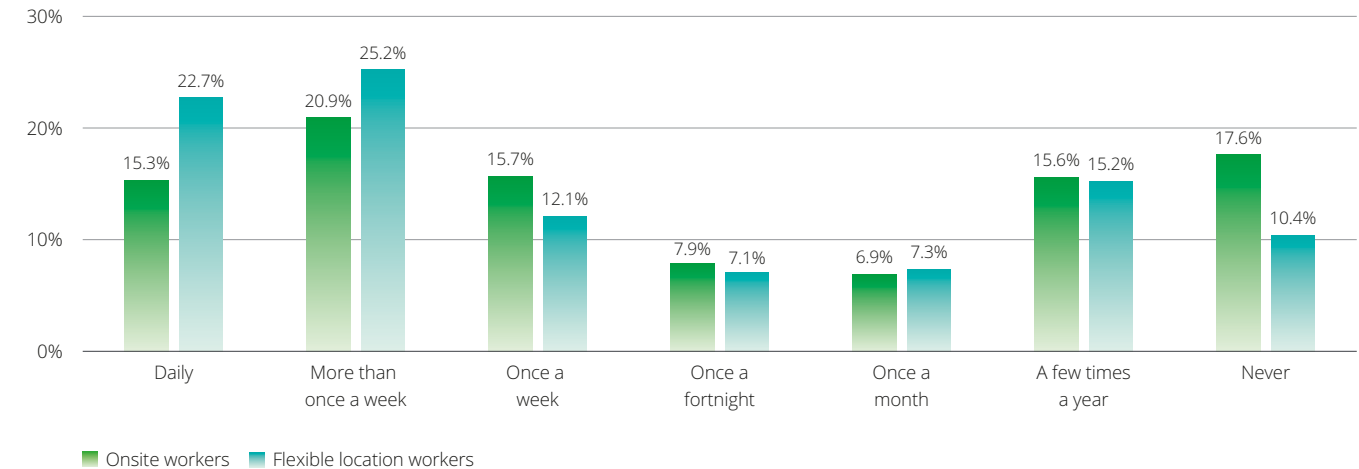
Onsite workers are much more likely to be working hours determined by their employer and most have their hours of work set by a roster (65%) compared to flexible location workers (36%)

More than half of workers are working outside their standard hours each week - 52% of onsite workers and 60% of flexible location workers

What/who determines hours of work



Frequency working outside standard hours



For most workers, time worked outside standard hours occurs either side of their shift or working day, with after hours being more common. Roughly 50% of workers are more likely to work outside their standard hours *after* their standard hours than *before*.

These results demonstrate many Australian workers, irrespective of their work location, are working outside their standard hours. We explore the reasons behind this below.

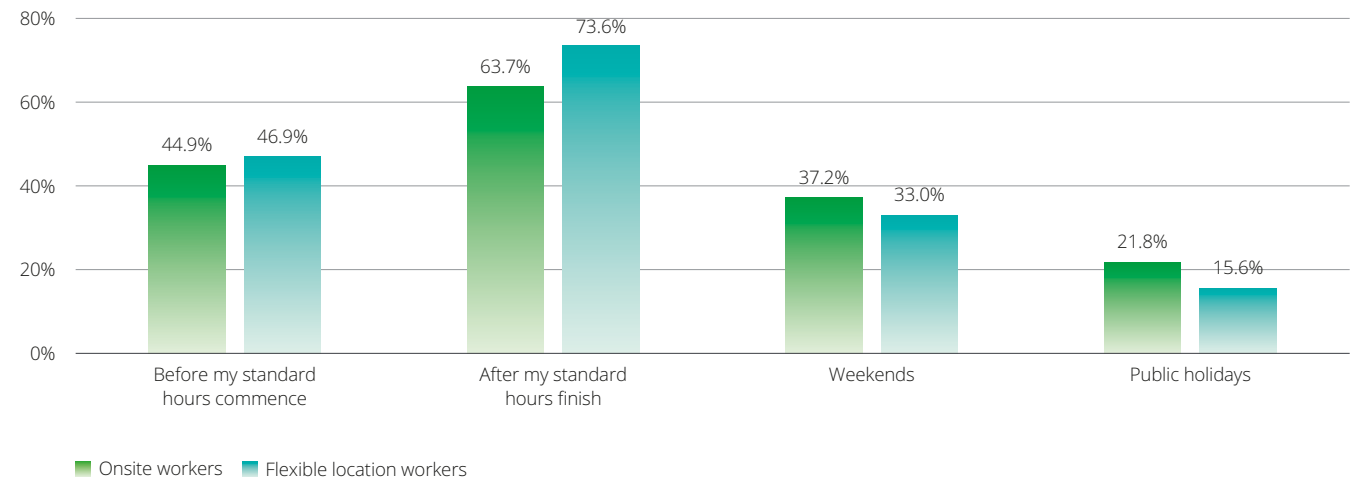
IR insight: Who decides when work is done?

Our Fair Work System generally assumes the location and hours of work are directed by the employer. The concept that employers direct and control the work of employees is at the heart of what defines an employment relationship and distinguishes it from other, less regulated relationships, such as with independent contractors. Employer policies set the parameters of what is permitted and what happens in practice.

The Fair Work System doesn't directly prohibit the employee choosing their hours or work location, but industrial instruments have been designed based on the assumption the employer directs hours of work and provides protections and guarantees for workers around these measures with on this basis.

The rules in the Fair Work System don't contemplate the various permutations of flexible working. At best, they provide mechanisms to seek formal flexible work arrangements while at the same time containing rules that constrain true flexibility and agency.

When non-standard hours are worked



Gender insight:

- A similar percentage of males and females report an increase in work hours since the pandemic (34.5% for males and 33% for females).
- More males (63%) work outside their standard or regular hours at least once a week compared to females (53%).
- Males are more likely to work more than 38 hours each week (65% of males compared to 50% of females).

50% of workers are more likely to work outside their standard hours after their shift than before

Males are more likely to work more than 38 hours each week (65% of males compared to 50% of females)

Workload: The reason behind most non-standard hours

Most workers identified workload as the main reason for working outside standard hours (63% of flexible location workers, 42% of onsite workers). Flexible location workers are much more likely to be choosing to work outside standard hours (43%) compared to onsite workers (29%).

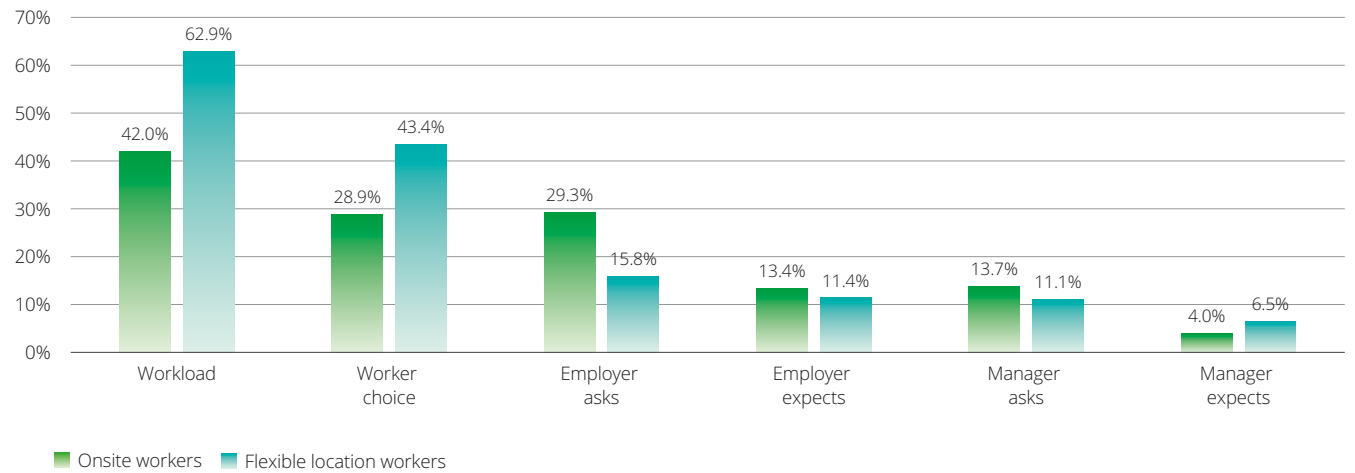
Australian workers are more likely to make the call to work outside standard hours than it being a direct requirement explicitly imposed on them by their employer.

Only 16% of flexible location workers say their employer directly asks them to work outside their standard hours, while 11% say it's their manager. This was higher for onsite workers, of whom 29% said their employer asks them and 14% said their manager did.



Flexible location workers are much more likely to be choosing to work outside standard hours (43%) compared to onsite workers (29%)

Reasons for working outside standard hours



1.5. Non-standard and extra hours: choice, compensation and compliance

IR insight: Compensation for working non-standard or extra hours

The Fair Work System provides compensation to employees covered by industrial instruments who work non-standard or extra hours, usually in the form of higher hourly rates of pay (overtime) or time off in lieu of overtime (TOIL). Employees are presumed to have been directed to work what have been deemed ‘inhospitable’ hours that require additional compensation.

The Fair Work System’s recordkeeping rules require employers to record work done by employees outside their standard hours that should be compensated for. Employers bear the onus of having a system in place to have visibility over hours worked and paid as per the rules.

Some employees are paid under an annualised salary arrangement, which is intended to compensate for extra or non-standard hours of work. The assumption is the salary level covers the value of those hours.

Other employees, namely those who are not covered by an industrial instrument, do not have an entitlement to compensation for working non-standard or extra hours under the Fair Work System.

Most Australian workers are entitled to receive some form of compensation for working outside under an enterprise agreement (EA) or a modern award (award). A key factor in considering the fairness of working outside standard work hours is whether employees are compensated for those hours.

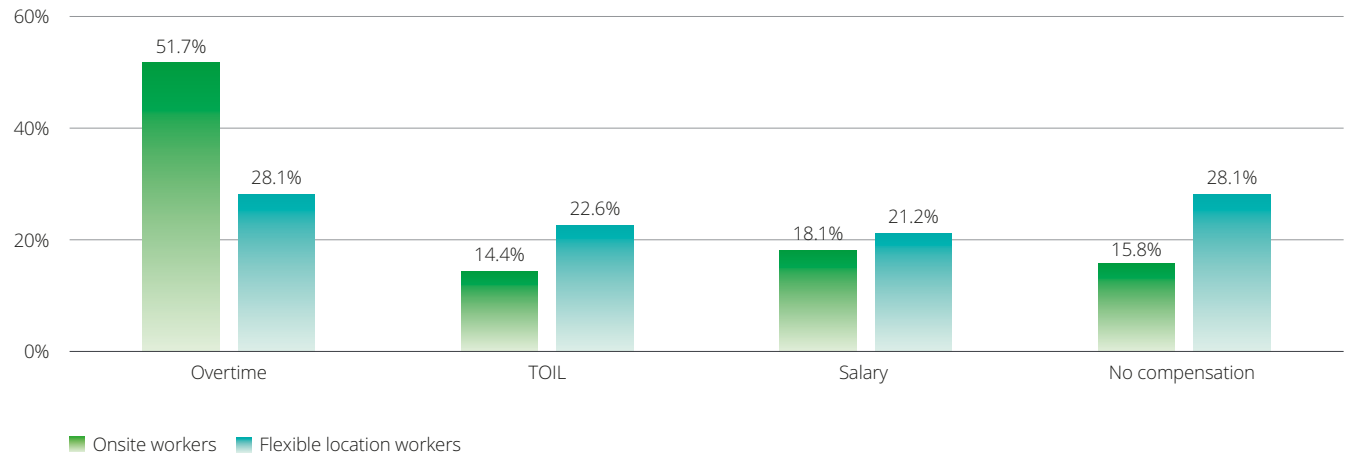
For flexible location workers, around three in four receive compensation either via paid overtime (28%), TOIL (23%), or salary (21%). 28% are not compensated for working outside standard hours.

Onsite workers are much more likely to receive financial compensation with more than half (52%) paid overtime. Salary compensates 18%, and 14% receive TOIL. One in six (16%) are not compensated at all.

Whether workers are onsite or flexible location, those covered by an EA are most likely to be compensated for working outside standard hours (through overtime, TOIL, or salary), followed by workers on awards. Workers covered by contracts are least likely to receive direct compensation.

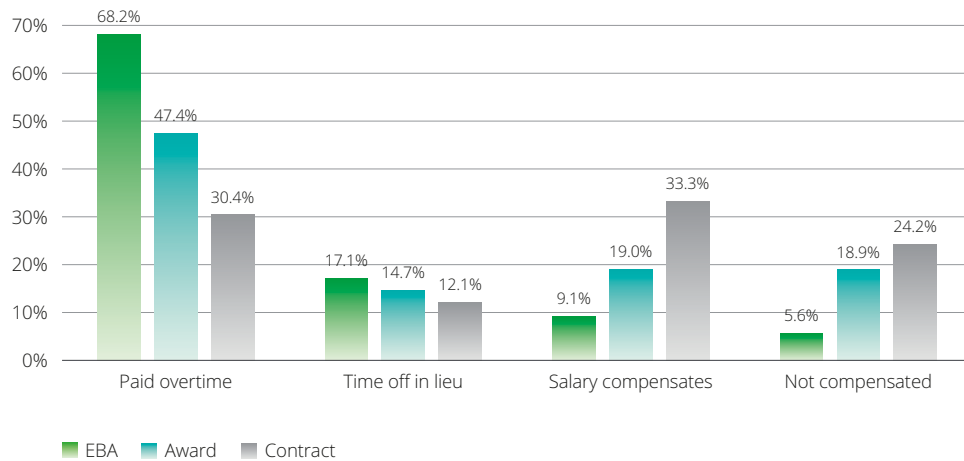
Enterprise agreements and awards are formally established within our IR framework, ensuring rules are set and enforceable.

Compensation for working outside standard hours

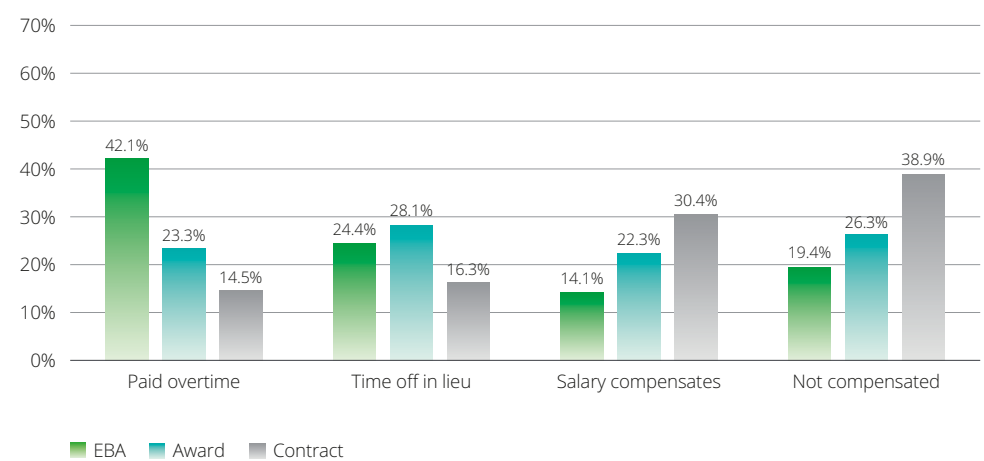


Flexible location workers are less likely to be compensated for non-standard hours - 28% compared to 16% of onsite workers

Onsite workers compensated for working outside standard hours



Flexible location workers compensated for working outside standard hours



IR insight: Choice and compliance in flexible work

The Fair Work System presumes that work is directed by the employer and that employees should be paid for all hours worked — even where the particular hours are chosen by the worker.

More than two in five (43%) flexible location workers choose to work outside their standard hours once a week. This highlights a challenge to the Fair Work System and raises a number of questions: when workers genuinely choose to work outside standard hours, should these hours attract extra compensation?

This goes to the heart of flexible working and work-life balance. Should an employer be required to pay the higher overtime or penalty rates for an employee who chooses to work late because, during traditional ‘standard’ hours, they have chosen to pick up the kids from school or do a Pilates class?

On the other hand, some workers are working non-standard or extra hours because of workload. How can employers reliably distinguish between a worker’s choice and workload?

Should our Fair Work System distinguish between patterns of work that are chosen and extra hours that are workload driven?

It may be the case that many employers are not aware of the detail of their employees’ patterns of work, especially flexible location workers. By extension, this raises concerns about wage compliance. Deloitte’s wage remediation experience suggests that underpayments are commonly caused by employees not being paid for all the hours they work.

Whether this is because time recording is not done accurately, or at all, the ‘hidden’ extra hours aren’t claimed even though the Fair Work System requires employers to record overtime hours of work and pay them accordingly.

It’s also common for underpayments to occur under annualised salary arrangements, because the real hours worked were not sufficiently compensated for by the salary. Some of the largest transgressions in the country have arisen under these arrangements.

We highlight that 27% of onsite and 38% of flexible location workers who are covered by a modern award or EA are either receiving no compensation or being paid under salaried arrangements. This raises the question whether remuneration arrangements are compliant for a significant number of employees.

1.6. From forced WFH to choice in location: The experience of flexible location workers

Pandemic-induced work-from-home (WFH) was not a choice for flexible location workers. When it was initially imposed, many workers experienced a better sense of work-life balance for the first time. No commute allowed for more flexibility in the hours we worked, more precious family time and more walks with the dog. And the virtual technologies that kept us connected with our teams while working remotely have been more effective for collaboration than many expected.

Enforced WFH is evolving into choices to work flexibly between locations. And when combined with working flexible hours, workers can spread their workload throughout their week as they choose. A nirvana of work-life balance is in the offing.

However, as this research shows, this is yet to be realised.

Many flexible location workers experienced a proliferation of online meetings throughout the day. 'Zoom Doom' for interactions that may have been shorter and less formal in the office – think sharing information and coordinating work – are now scheduled interactions, often for a minimum of half an hour. As a result, employees are not only screen fatigued, but less efficient and less effectively connected.

Genuine hybrid work will work best where teams can redesign the structure of work, rather than attempting to apply existing approaches into a new work model. Likely changes could include fewer synchronous online interactions and more asynchronous work and communication.

For flexible location workers who regularly work outside their standard hours (at least once a week), this research shows it's around 50% more likely to be due to workload than by choice. This reveals two things: workers can be trusted to do the work, and they have demonstrated they are able to work flexibly. This holds promise.

While the pandemic has imposed extraordinary challenges on workers, we now have an opportunity to reset and protect work-life boundaries as we continue to evolve hybrid work.

If we don't get this right, we risk working more non-standard and extra hours, dictated by workload, even if we have a degree of choice about when and where we work. Leaders and workers need to experiment and be open to finding the right balance.

Many flexible location workers are regularly working non-standard hours and are most likely to be doing so because of extra workload. But they are also more likely than onsite workers to be choosing the hours they work

While the pandemic has imposed extraordinary challenges on workers, we now have an opportunity to reset and protect work-life boundaries as we continue to evolve hybrid work



Section 2: Restore

2.1. Work-life balance is no longer a nice-to-have

At the end of 2021, Australian workers felt more burnt out than at any point throughout the year. According to ELMO Software almost one in two workers (45%) felt burnt out, which coincided with a third of workers (32%) feeling overwhelmed with their workload. This is reflected in the percentage of workers taking mental health leave, which grew throughout 2021 and peaked in Q4 at 17%.

Work-life balance has been discussed for years but has never been fully realised. This is why flexibility has become so important to both flexible location and onsite workers; it offers the *promise* of improved wellbeing and better work-life balance.

The pandemic was the catalyst to change mindsets and demonstrated that people could work from home and be productive. In the post-vaccination period and as restrictions have eased, workers have been able to have some agency over where and when they work. Flexibility has now become an expectation of the traditional office worker. And onsite workers increasingly expect what their flexible location worker colleagues have.

As workers lift their heads and look to the future, they need to restore, they need more life in work-life balance and more agency to protect it. Work-life balance is no longer a nice-to-have and flexibility is increasingly the deal breaker. More and more workers are determined to have choice in where they work. The term 'hybrid work' was not something we thought about before the pandemic. Now, it's at the centre of the 'return to the office' debate, and the most popular choice for flexible location workers.

2.2. Workers want flexibility in where they work

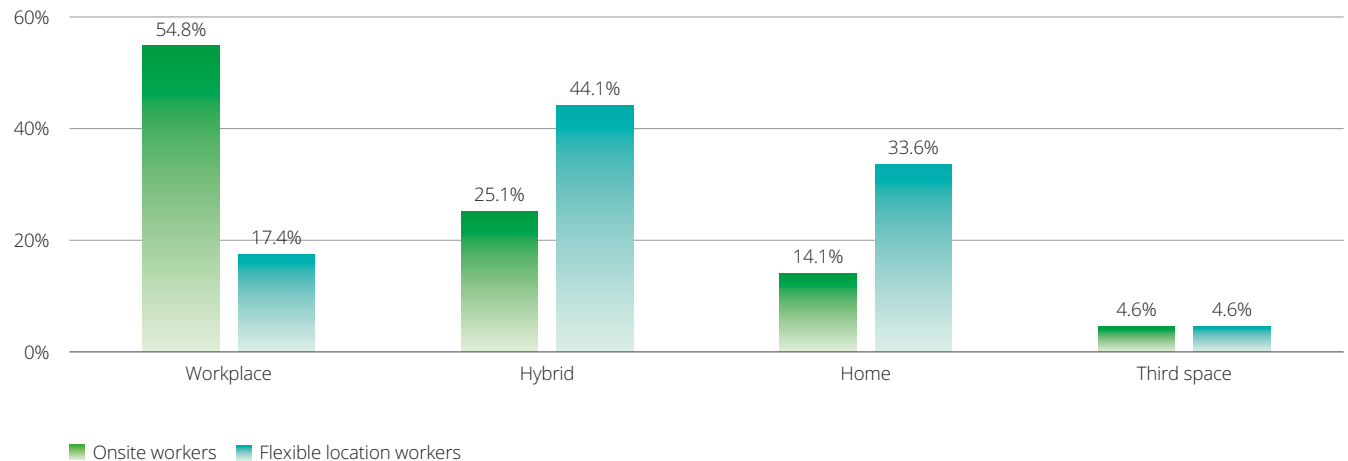
Flexible location workers have the strongest preference (44%) for hybrid working: switching between their workplace and home or other remote locations. The next preferred ideal location was home (34%) with the workplace in third (17%).

A significant number of onsite workers also want choice in their location of work: 25% want hybrid work arrangements, followed by working from home (14%).

Offering flexibility around location may be difficult (or impossible) to achieve for most onsite workers. This may become a driver for some employees to look for new roles that can offer location flexibility. Regardless, employers are under increasing pressure to consider how they can provide their onsite workers with greater flexibility.

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A significant number of onsite workers want choice in their location of work: 25% want hybrid work arrangements, followed by working from home (14%)

Preference of ideal work location



2.3. For flexible location workers in the year ahead: more home, more hybrid, less office

When we compare the results for flexible location workers on their ideal work location with data collected five months earlier by the Centre for the New Workforce (CNeW), we see a significant change in preferences.

There has been a small increase (6%) in preference for hybrid working for flexible location workers.

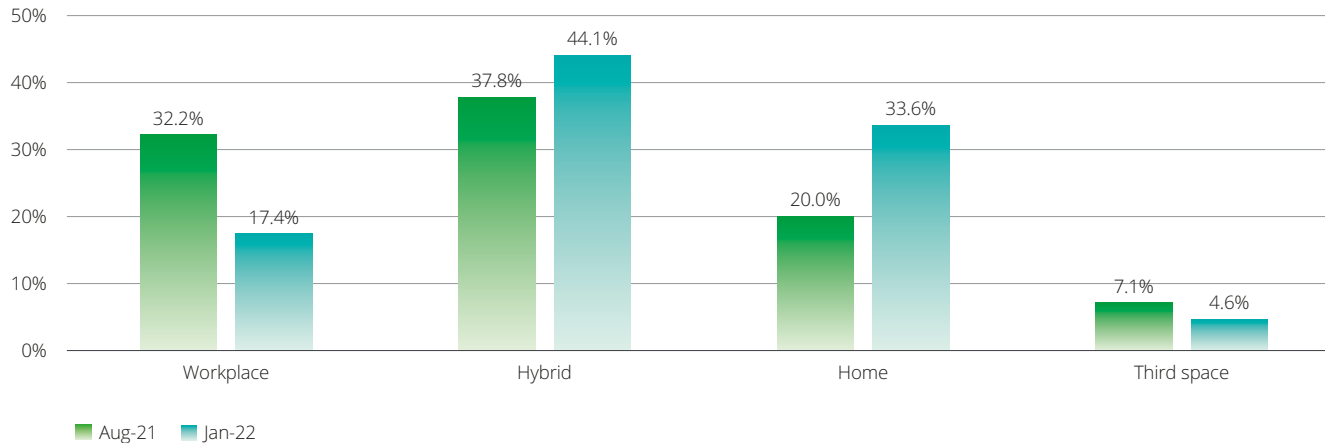
However, the major shift is a change in preference towards working from home, at the expense of the office. Home as the ideal location increased by 14% while the workplace decreased by 15%.

A strong indication of the expectation of worker choice is that almost four in five flexible location workers (78%) want home to be their work location at least some of the time, combining home and hybrid preferences.

Three in five flexible location workers (61%) still want to be in their workplace at least some of the time. Working in the office is not over. However, the change in preference away from the workplace presents challenges. CNeW research shows that a physical workplace is essential for work that benefits from meaningful in-person interactions, including workplace learning, connection and belonging, creativity and innovation, and culture. The move away in preference for the workplace indicates that employers need to reframe the office around human interactions.

Four in five flexible location workers (78%) want home to be their work location at least some of the time

Change in preference of ideal work location for flexible location workers



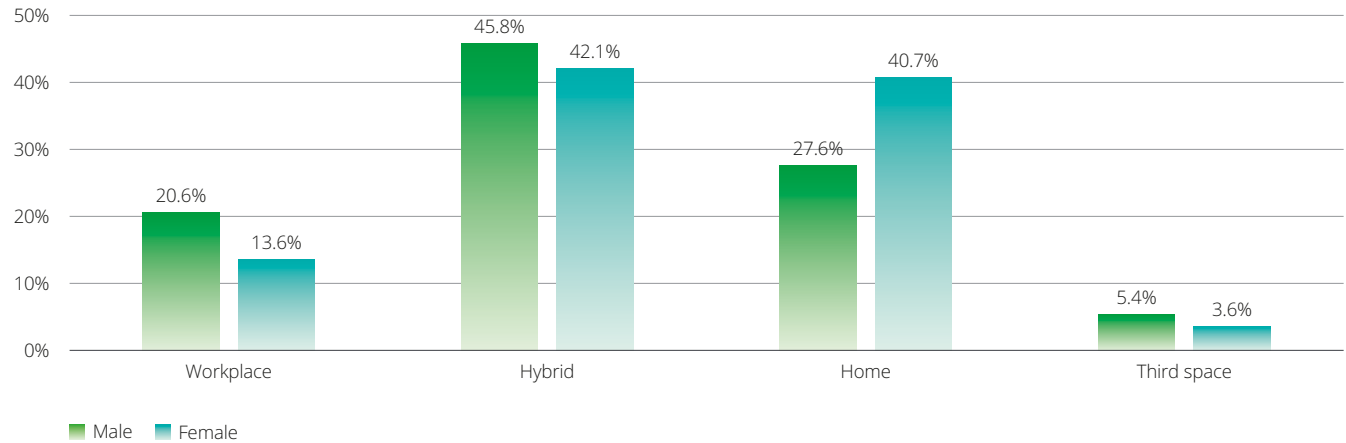
Gender insight: Overall, there is little difference between men and women in their preference for the ideal workplace among both flexible location and onsite workers.

The one clear exception is that female flexible location workers are more likely than men to choose home as their ideal location (41% vs 28%) and less likely to choose the workplace (14% vs 21%).

This reflects many other studies that have found women take on more household and caring responsibilities and carry a disproportionate load in this respect during the pandemic. While working from home has allowed for better diversity outcomes, we need to ensure these are not lost with the return to the office.

Wanting more hybrid or home-based work is an indication that workers want better work-life balance. CNeW research found work-life balance was a key driver for workers seeking flexibility. In this research, we go further to better understand the interplay between flexible working, wellbeing, and work-life balance, and how flexible working compares to traditional incentives like pay and leave.

Ideal work location for flexible location workers



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Female flexible location workers are more likely than men to choose home as their ideal location (41% vs 28%)



2.4. FlexWork delivers a wellbeing dividend

The life benefits derived from flexible working can be grouped into three categories: wellbeing, domestic duties, and other duties like caring and self-improvement.

First and foremost, workers indicate flexible working delivers a direct personal benefit through improved wellbeing. Better work-life balance, less commuting, improved mental health, and more physical activity are clearly the standout benefits for both onsite and flexible location workers. (We note that commuting is not as important for onsite as it is for flexible location workers; our data shows that most onsite workers have a much shorter commute to their work location than flexible location workers.)

It is notable that improved mental health ranked higher than physical activity for both cohorts – flexibility is not just about reclaiming more time for ourselves, but the physiological benefits from having more choice and agency around how we balance work with the other parts of our lives.

Caring for others and self-improvement is seen as a secondary benefit from flexible working.

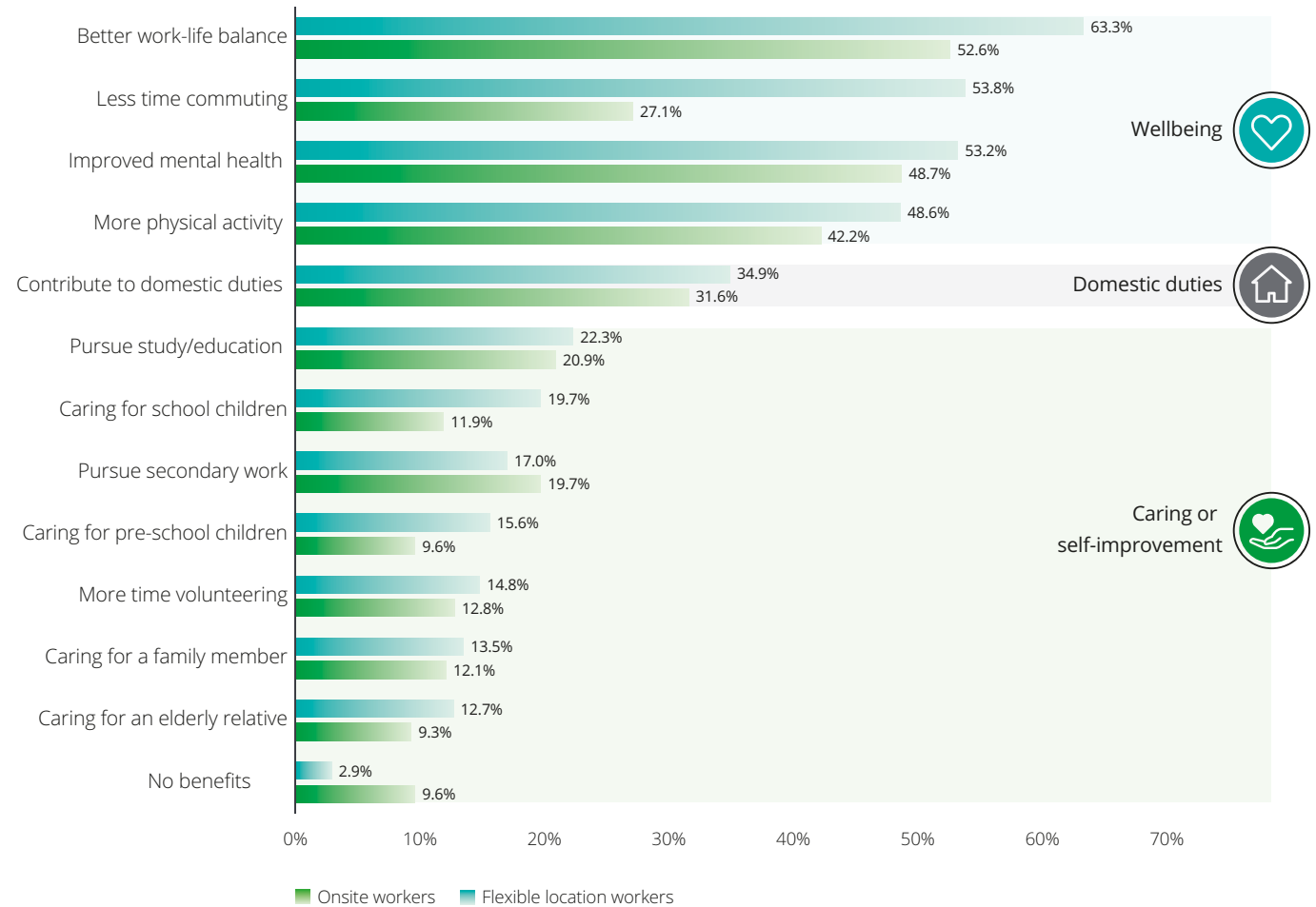
Gender insight:

There was little difference between male and female flexible location workers who selected 'contributing to domestic duties' as a benefit (34% vs 36%). However, male onsite workers are less likely to select this benefit (26%) than female onsite workers (37%).

We recognise that all workers have to work, but not all workers have caring responsibilities. We might expect those who do have caring responsibilities to have different relative preferences. However, further analysis of the data by household size and gender shows that this pattern does not significantly change.

In summary, all workers see flexible working as delivering a wellbeing benefit.

Life benefits from flexible working



Flexible working delivers a direct personal benefit through improved wellbeing. Better work-life balance, less commuting, improved mental health, and more physical activity are clearly the standout benefits for both onsite and flexible location workers

2.5. Importance of flexible working compared to other benefits

Workers clearly identify the benefits of flexible working – but how important is it in the overall value proposition to the employee? We asked respondents to identify what work factors were most important to them.

Wellbeing and pay are the equal most important work benefits for both onsite and flexible location workers, highlighted by around 93% of respondents.

Work autonomy, team and organisation culture, leadership, and doing impactful work also rate highly for all workers, but especially for flexible location workers.

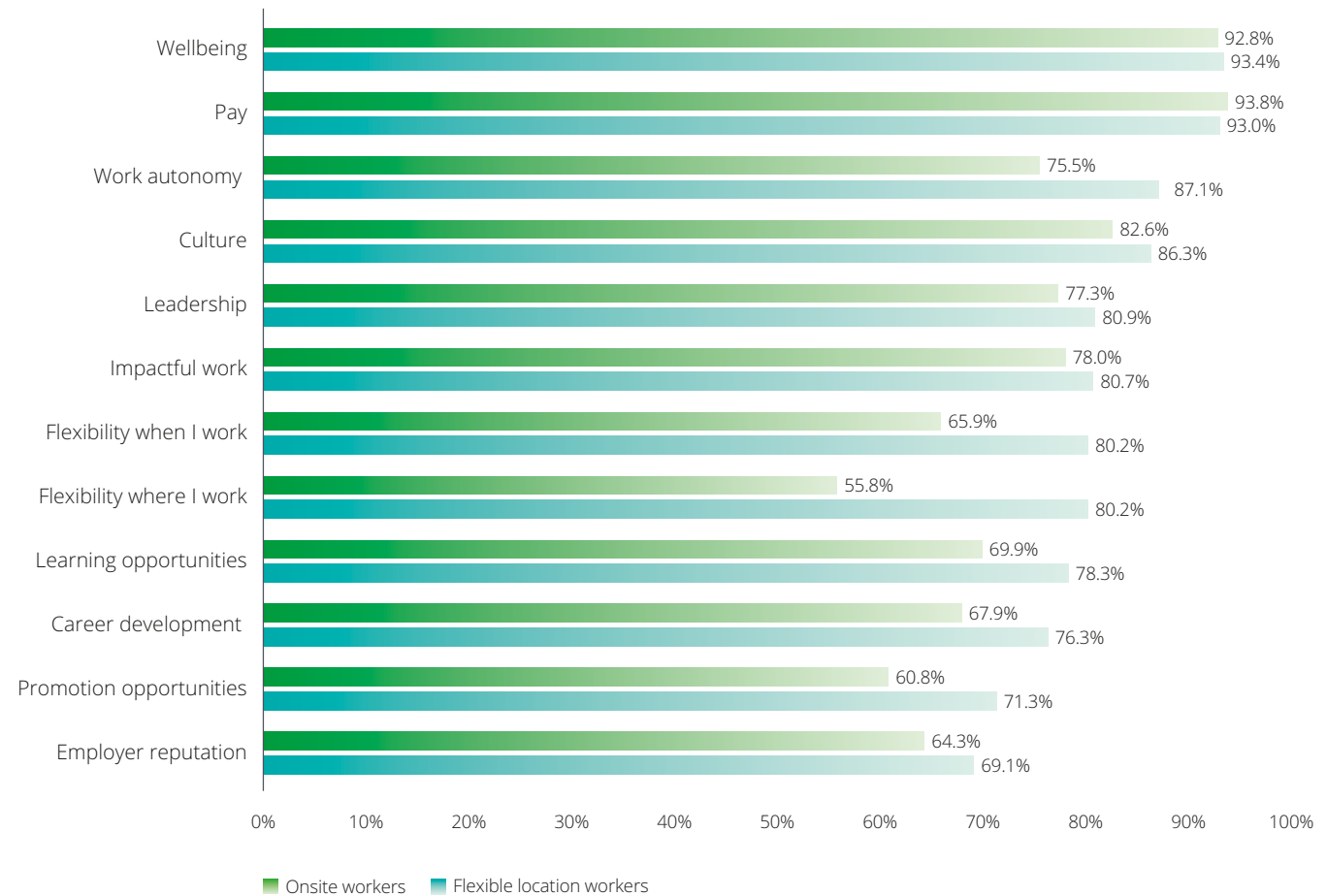
Flexible working – both when and where – comes next. It's rated more highly by flexible location workers (around 80% for both when and where) than it is for onsite workers (when – 66%, where – 56%).

This suggests that flexible location workers, having experienced greater flexibility (and perhaps also greater autonomy) during the pandemic, are valuing these newfound benefits more highly and don't want to lose them.

It's highly significant that wellbeing was identified as being just as important to employees as pay. Historically, pay has always been the standout work benefit for employees. Our pay has a clear, measurable 'value' and sits at the core of our legal, contractual arrangements.

Wellbeing, on the other hand, is subjective and variable. The fact that wellbeing is of equal importance to pay emphasises the importance of workers' need to restore. Flexible working is not as important as wellbeing; however, this research demonstrates that workers see flexible working as enabling their wellbeing. This is a critical connection employers must not ignore, especially when framing remuneration and benefit packages, whether it be to retain existing employees or attract new ones. Wellbeing can't be written into work agreements, but flexible working – a key enabler of wellbeing – can.

Importance of work factors for workers: Proportion of workers rating factors as very or quite important



.....
 It's highly significant that wellbeing was identified as being just as important to employees as pay. Historically, pay has always been the standout work benefit for employees

Section 3: Reframe

3.1. What's FlexWork worth?

Remuneration is at the centre of all employment arrangements and critical to enabling us to meet our commitments. Our pay is also a sign of status and generally an indication of greater responsibility, influence, and autonomy in the workplace. Following the period of pandemic-driven uncertainty and a time of record low wages growth, with cost-of-living pressures increasing, we might expect pay to be front of mind.

Workers want flexible working arrangements. But what is it worth and how does it compare to the traditional elements of remuneration packages like pay and leave?

In an environment where many have changed jobs, and many more would be contemplating it to seek flexibility, what is the value proposition that will motivate workers to leave or convince them to stay?

We asked workers to rate the importance of flexibility head-to-head with getting a pay rise and more leave entitlements.

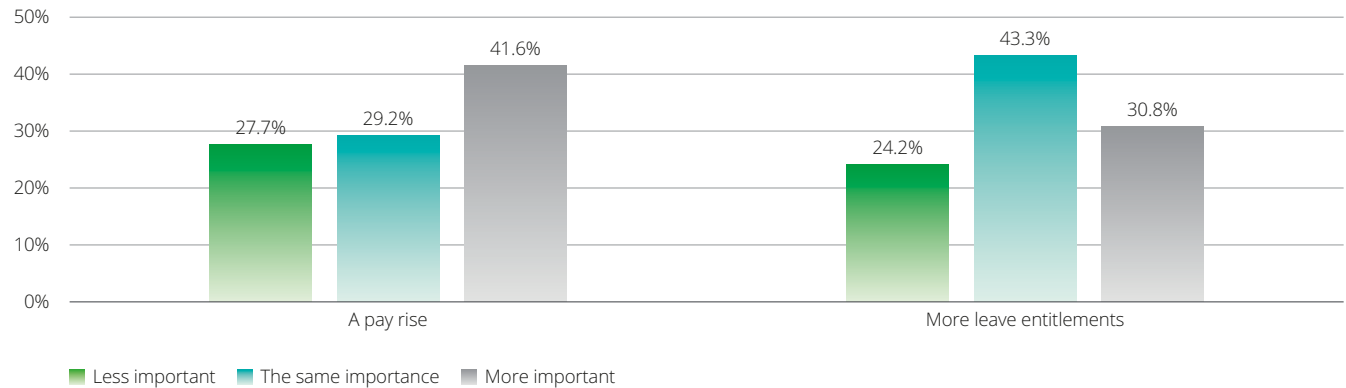
More than seven in ten workers rate flexibility to be as or more important than pay. In the case of flexible location workers, it was three in four (78%), compared to 71% of onsite workers.

A significant cohort said flexibility was more important than pay, with flexible location workers (44%) slightly more likely to indicate this than onsite workers (42%).

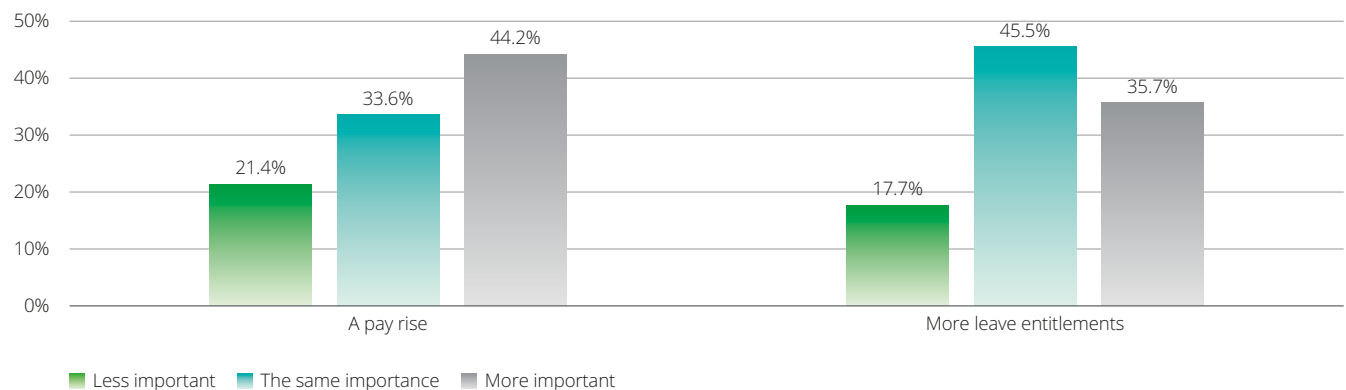
Flexibility is as or more important than getting additional leave entitlements for four in five flexible location workers (81%) and for three in four onsite workers (74%).

These results indicate a significant turning point in the employee value proposition. More pay and leave may not be sufficient to attract and retain talent. Traditional levers and incentives for work and performance (pay, leave, TOIL) are diminishing in relative importance.

Relative importance of flexibility: Onsite workers



Relative importance of flexibility: Flexible location workers



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 A significant cohort said flexibility was more important than pay, with flexible location workers (44%) slightly more likely to indicate this than onsite workers (42%)

3.2. Putting a dollar value on FlexWork

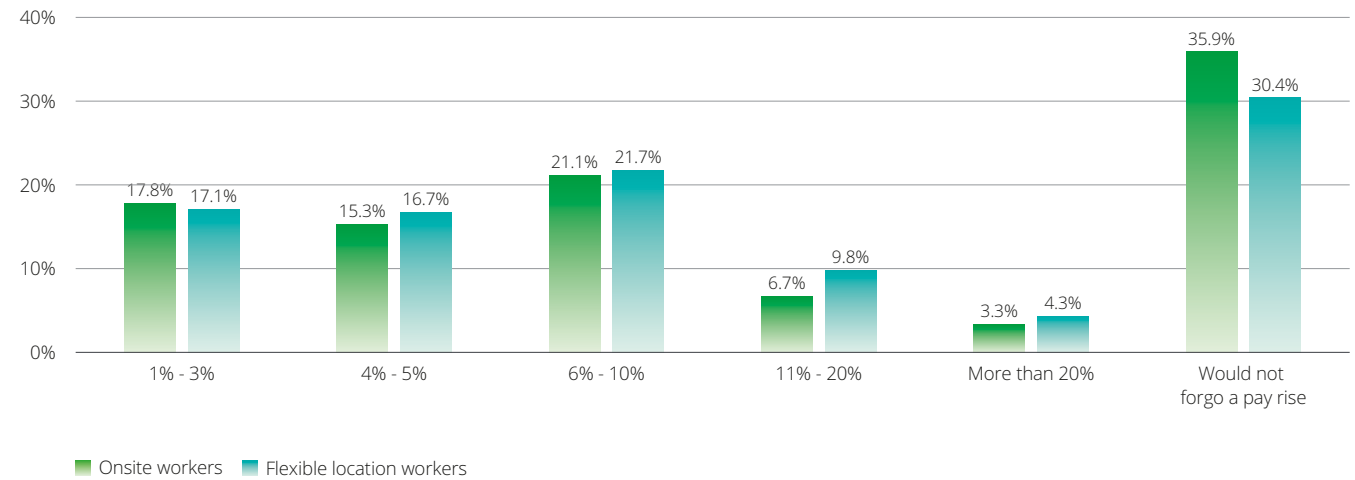
What level of pay increase would workers be prepared to forgo to retain or access greater flexibility regarding where and when they work?

Around two in three Australian workers are prepared to forgo some level of pay increase to achieve flexible working. For flexible location workers, 70% would forgo varying levels of pay rise, compared to 64% of onsite workers.

The most common choice was a pay rise between 6% to 10%, chosen by more than one in five workers (21% of onsite workers, 22% of flexible location workers).

We should not assume that these results mean workers would give up a pay rise altogether. For instance, some workers might prefer a 10% pay rise without flexibility but be prepared to forgo 5% of the pay rise for flexibility.

Equivalent value of flexible working as a pay rise



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Around two in three Australian workers are prepared to forgo some level of pay increase to achieve flexible working

IR insight: Value vs time and the compliance challenge

This research shows workers know what flexibility is worth to them and can put a dollar figure on it. But how does our Fair Work System “value flexibility?”

The Fair Work System assigns hourly rates of pay to time worked. Non-quantifiable benefits such as wellbeing, autonomy, and contribution to family and personal life are not given a value or part of the calculation.

Where the Fair Work System provides flexibility (eg under an enterprise agreement) it requires that the ‘take home pay’ leaves every worker ‘better off overall’.

This is measured primarily based on a calculation of the assigned dollar value, not how it’s valued by the individual worker.

Since the beginning of the pandemic, employees have been choosing different work practices that they value. For some this includes preferred hours outside traditional ‘standard hours’.

Previous approaches that support individual preferences have been controversial and, in some cases, used as a tool to strip away traditional worker protections (e.g., Australian Workplace Agreements). Demands for guarantees that ‘no worker be worse off’ focus on the pay elements not personal preferences.

We consider it imperative to enter this hallowed territory. We ought to reconsider the sustainability of a system that doesn’t support individual choices about working hours. A cohort of employees are already choosing to work outside the Fair Work System’s standard hours. Employers are increasingly at risk of non-compliance with the Fair Work System’s rigid rules. We recognise that many workers do and will continue to be directed on where and when they work. It should be possible to protect the entitlements and choices of both cohorts.

3.3. Enabling FlexWork: Employer policies

With the rise in worker expectations of being able to work flexibly, how are organisations formally responding? Do they have a remote working policy in place that workers are aware of? And how does that correspond to whether a worker is able to work remotely or must be onsite?

Almost two in three flexible location workers (64%) report their organisation has a remote work policy, compared to 33% of onsite workers.

It's noteworthy that a third of flexible location workers are either not covered by a formal remote work policy (23%) or unsure one exists (13%).

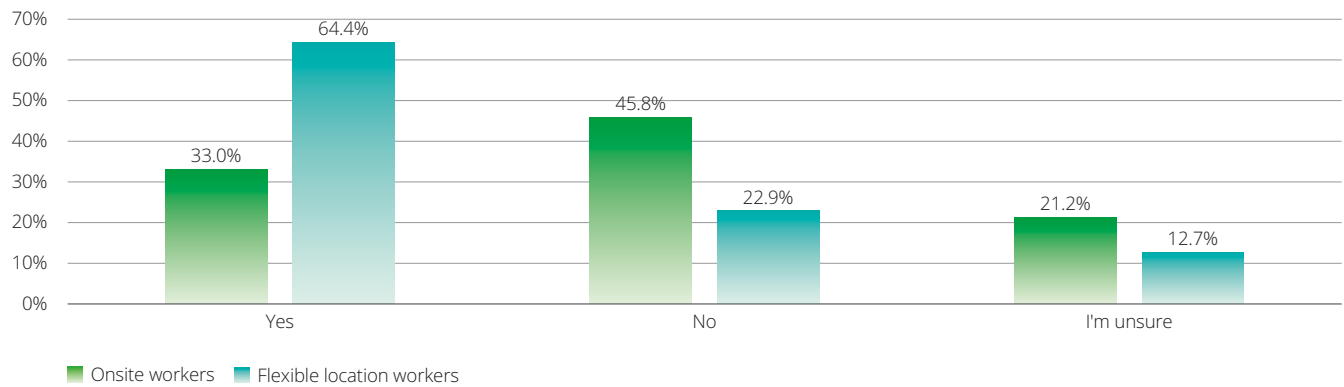
Many flexible location workers have worked from home since the pandemic. This raises the question of how the rules of engagement have been set and how various compliance obligations – around wages and health and safety – are being met.

For flexible location workers, organisations with more than 50 employees are more likely to have a formal remote working policy than those with fewer than 50 employees. Yet, surprisingly, one in eight (14%) employees working in organisations of more than 1,000 employees are not covered by a formal remote working policy, as reported by flexible location workers.

Implementing a remote or flexible working policy is in the employer's interest. It creates clarity around what can and can't be done when working remotely. It also ensures employers are clear and complaint about work from home arrangements.

Only 33% of onsite workers work in organisations that have a formal remote working policy, suggesting that flexible working is still in its infancy for work that is location dependent.

Does your employer have a formal remote work policy?



3.4. Flexibility reframed

This research indicates there has been a surge in job mobility in Australia, especially during the last year, with one in three workers leaving their jobs. The experience in the United States provides some insight into what is driving this change.

In the US, where the Great Resignation is underway, at least four million Americans have quit their jobs every month since July 2021, including many who have left the workforce permanently. Analysis indicates that for many workers leaving their organisation, it's driven more by human and relational factors than traditional job factors. These factors include feeling valued at work, the relationship with the manager, and organisational culture. Traditional structural and career factors such as job title, brand, and compensation are less relevant and potent than they once were.

Indeed, according to the recent study from the Pew Research Center, many who quit have achieved better remuneration and flexible working benefits. Some 56% of US adults surveyed by Pew say they're earning more money in their new jobs and have more flexibility around their work hours, better opportunities for career growth, and improved work-life balance.

In Australia, as we return to the workplace without restrictions and post-vaccine, more and more workers will be weighing up their employer's value proposition around flexibility, which we call FlexWork.

Australian workers have come through an intense and disruptive two-year period indicating they're not looking to return to the pre-pandemic concept of business as usual. Pay is important, but workers are looking for a more tailored set of benefits that deliver choice and flexibility.

While our research primarily investigates the prevalence and importance of flexibility, and how it compares with traditional incentives like pay, human factors must also form part of the overall value proposition for employees and the organisation.

Workers identify human factors such as wellbeing, culture, autonomy, purpose, and leadership as important to them. These all rate more highly than job factors such as opportunities for learning, promotion and career progression, and employer reputation.

.....
 It's noteworthy that a third of flexible location workers are either not covered by a formal remote work policy (23%) or unsure one exists (13%)

Equal opportunity for progression when working from home

Professor Nicholas Bloom of Stanford University says that, in the past, ‘workers that spend more time working from home seem to unfairly lose out on promotions to workplace present colleagues’. When managers come into the office it pressures employees to do the same, so creating a company-wide remote working schedule is essential to ensure ‘all employees get to enjoy remote work without feeling they are missing out on promotions’.

3.5. Inclusive work practices in a hybrid world

Concerns have been raised, prior to and after the pandemic, that those who spend more time working from home may unfairly lose out on promotions to their colleagues who are more physically present.

More than a third of flexible location workers in this research were concerned about the existence of proximity bias, and how their choice of work location might affect their career prospects, with male flexible location workers more concerned (41%) than their female colleagues (31%).

The Global Deloitte Women @ Work 2022 report conducted at the end of 2021 and the beginning of 2022, found Australian women working in hybrid environments feel they have been excluded and experienced higher levels of non-inclusive behaviour. Nearly half of the women surveyed (44%) said they felt less optimistic about their career prospects than a year ago.

Developing clear policies around hybrid work that ensure workers can genuinely access this option without compromising their career prospects will create more inclusive work practices and enhance retention of workers who are demanding it.

Combined with the stressors of workload and burnout, indicated in this and other research, we expect the relative importance of these human factors to be amplified.

Research on burnout identifies several causes including lack of motivation, perceived lack of fairness, lack of control, increased workload, and insufficient reward and recognition for effort. Pay can play an alleviating role, as can having a complete disconnect during the workday, but neither is sufficient.

Workers want connection. They rate team and organisation culture highly, value seeing their work make a difference, and have demonstrated they can be trusted to do it. They seek more autonomy and control over their work, supported by inspiring leadership. They want to be proud of their work, team, and employer, and to be treated like adults.

We also recognise that to make flexible working sustainable, employees expect access to suitable technology – such as collaboration tools and well-designed workplaces – that allows them to work and collaborate effectively across remote, hybrid, and workplace settings. This will not only enhance worker and team productivity, but also support organisational creativity and innovation.

By focusing only on benefits like pay and even flexibility, employers run the risk of talent becoming transactional. This binary view misses the human factors. We propose a new framework for the employee flexibility value proposition: job, FlexWork, and connection, all enabled by leadership.

Employee FlexWork value proposition – enabled by leadership



Leadership

Job

- Rewarding
- Career progression
- Purpose and meaningful work
- Learning opportunities

Connection

- Trust
- Belonging
- Culture
- Collaboration

FlexWork

- Work-life balance
- Wellbeing
- Autonomy
- Technology and workplace design

IR insight: Supporting flex through enterprise agreements within the current Fair Work System

This research reveals that workers covered by enterprise agreements, which are tailored to the workplace, are more likely to have choice and flexibility, be working non-standard hours, and be willing to forgo a percentage of their pay to achieve flexibility. Their employers were more likely to have a remote working policy in place to facilitate remote work, especially flexible location workers.

Enterprise bargaining is at an all-time low. There are several reasons for this, including various constraints and challenges which have been well documented elsewhere’ to ‘documented and actively debated in the public arena.

But these results suggest employers might need to reconsider the option of bargaining to facilitate more flexibility for their employees as a way of attracting and retaining the talent they need. It may be the most effective way of ‘buying out’ higher hourly rates to enable variable work patterns while managing compliance risks. The first step is for employers to engage with their employees to understand their flexibility needs.

Section 4: The road ahead: can we make FlexWork work for us all?

Flexible location workers want flexibility embedded in their value proposition to support wellbeing and balance in their lives. Onsite workers want the same and are looking to employers to acknowledge and support them in achieving it.

Employees are driving the change, which many employers may find uncomfortable. And workers have more leverage than ever before in this competitive labour market.

Employers whose strategy is 'revert' rather than 'reframe' risk a disengaged workforce, losing the war for talent, and incurring the costs of replacing experienced workers in the face of labour shortages and shifts in worker expectations.

Employers have an opportunity to engage with their workforce around this fundamental redesign of work while aligning it to their organisation's values, social license, and mission.

This is not without significant challenges. Employers will need to evolve their approach and refine FlexWork to deliver genuine work-life balance in the face of several complexities and tensions.

The flexibility divide

How can employers offer the benefits of flexible working to both their flexible location and onsite workers and avoid dividing their workforce? How might employers attract workers to onsite roles in the face of labour shortages in some sectors, and what might they do to help this cohort achieve balance and wellbeing?

The complexity of diversity

Employees' FlexWork desires and needs are diverse. How can employers engage with their workforce and codesign approaches that match individual expectations while meeting team and organisational requirements?

The compliance challenge

Are employers clear about their risk appetite when it comes to compliance with the Fair Work System and how they balance that imperative with delivering FlexWork?

The workload challenge

How do employees' genuine choices around patterns of work align with the backdrop of a fair overall workload? What might we do to support the setting of boundaries around hours and intensity of work to avoid burnout?

Choose to connect

How do we design our days to ensure our time in the office capitalises on connection, collaboration, and innovation?

Engage all employees

How do employers not only engage and empower all workers in co-developing a FlexWork value proposition, but also develop the principles, standards, and values that guide decisions and nurture culture in hybrid working?

Labour market challenge

As employers grapple with these complexities, there are broader long-term implications for our labour market.

Jobs that can offer FlexWork will be more attractive to employees, and employers may struggle to retain the onsite workforce they need. Sectors that have struggled during the pandemic, such as hospitality and retail, face real labour shortages. These sectors may not be able to afford wage increases, but with the cost of living rising and wage growth at an historic low, this may be inevitable. The reopening of our borders may offer some relief, but not enough to reverse the trend.

Similarly, our caring and education sectors have done it tough. Teachers, nurses, aged care staff, and child care educators have all had to front up during the pandemic, and their opportunities for FlexWork are limited.

These are workforces that are relatively lower paid, feminised and, in many cases, will continue growing to meet society's needs for generations to come.



Unusually, employees are driving the change. And workers have more leverage than ever in a highly competitive labour market

Employers have an opportunity to engage with their workforce around this fundamental redesign of work while aligning it to their organisation's values, social license, and mission

Fair Work System challenged

Finally, genuine FlexWork presents a challenge to the underlying assumptions and presumptions of our Fair Work System. The model of employment is evolving from *control* to *choice* within a framework.

We have a proud history in Australia of putting ‘a fair day/s pay for a fair day’s work’ at the heart of our Fair Work System. But what is ‘fair’ in the eyes of one worker may be valued differently by another.

Employees want more from their jobs than fair pay.

Our traditional way of measuring value is no longer fit for purpose for a significant cohort of workers, who are valuing wellbeing and choice at least as highly as pay. Placing compliance with hourly rates as paramount, while not considering the value of choice, flexibility, and agency, is not delivering what many workers want.

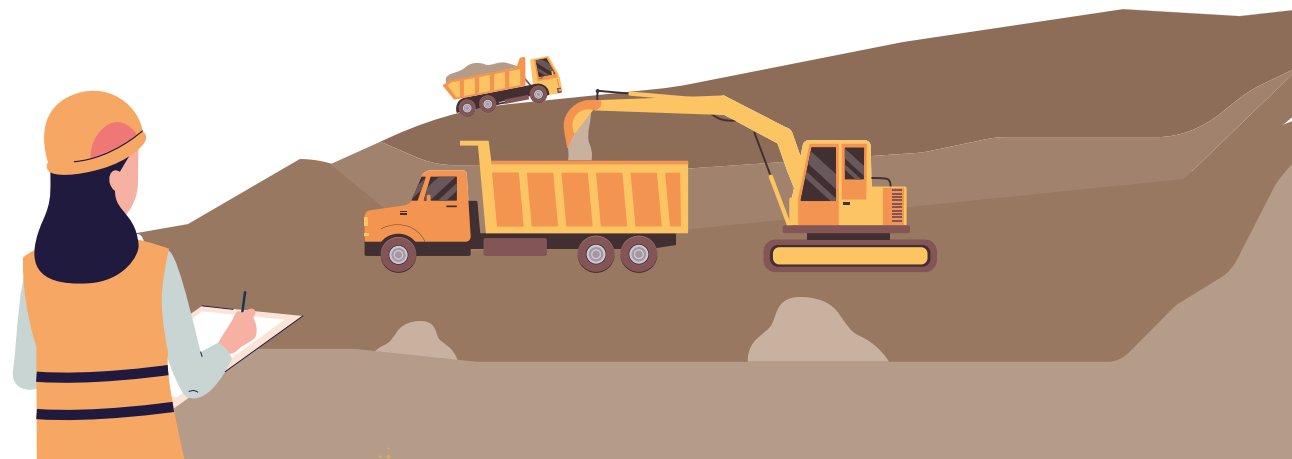
The Fair Work System needs to evolve to recognise that employees value choice, flexibility, and wellbeing, and jobs that deliver these elements will be better than those that do not.

In the meantime, employers might consider afresh the options within the Fair Work System that enable greater flexibility. While limited, employers can access current mechanisms of offering choice: enterprise bargaining, individual flexibility arrangements, and high-income guarantees could go some way to better supporting greater choice and flexibility about location and hours of work while minimising compliance risks. It’s never been more important for employers to have a clear industrial relations strategy that is aligned to their business and fosters employee flexibility and engagement.

On the road ahead, employers have the opportunity to redefine normal work as flexible work. Workers are signalling they need to immediately restore through improved wellbeing and better work-life balance. We believe organisations need to reframe work to embed flexibility in their employee value proposition. The road ahead has many challenges and opportunities arising from the growing expectation of flexible working, and it’s a road we are already on.

.....
Employers might consider afresh the options within the Fair Work System that enable greater flexibility e.g. enterprise bargaining

.....
Jobs that can offer FlexWork will be more attractive to employees, and employers may struggle to retain the onsite workforce they need



Glossary

Term	Definition
Enterprise agreement (EA)	An industrial instrument made between employers and employees setting out the terms and conditions for the employees it covers.
Fair Work System	The entitlements and obligations established under the <i>Fair Work Act 2009</i> which establishes a national system of employment regulation applying to most Australian employees.
Flexible location worker	Workers whose work does not require them to be onsite at their employer's workplace or client's site and who can or could work remotely.
Modern award (award)	An industrial instrument that sets minimum terms of employment.
Onsite workers	Workers whose work requires them to be onsite at their employer's workplace or client's site.
This research	The work undertaken by Deloitte and Swinburne Edge for the purpose of preparing this report. This includes conducting the survey, analysis of survey results, and review of relevant research, reports, and policy.
Standard or regular hours	For the purposes of this report, 'standard hours' refers to the hours the employee is generally expected to do their work.
TOIL	Time off in lieu of overtime.
FlexWork	Flexible working.

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Methodology

In late January 2022, Deloitte’s Workplace Integrity Practice and Swinburne University’s Centre for the New Workforce surveyed and analysed responses from 2,084 workers across Australia. The sample targeted people aged 18–65+ who are currently employed or self-employed. The aim of the survey is to understand the experience, expectations, and motivations of workers whose work is not location dependent.

The sample recruited workers who can or could work remotely as a proxy for those able to work flexibly across locations. To enable us to perform comparative analysis, the sample is weighted towards workers who can or could work remotely (73% of the sample and approximately 43% of the workforce) versus those who cannot (27% of the sample and approximately 57% of the workforce). We worked with our survey partner YouGov to determine this sampling and ensure both cohorts in the sample are representative of these workers across the economy.

In most instances the statistical significance of values has a probability of $p < 0.001$. Where we extrapolate overall survey findings from the sample population to the workforce more generally, we only provide an indicative measure, such as ‘three in four Australian workers’, where we are confident. For example, where we say ‘one in three workers are working more hours since the pandemic’, we extrapolate from the values we have of the two contributing cohorts (34% of flexible location workers and 32% of onsite workers working more hours) to estimate the corresponding value for the overall Australian workforce. Based on the approximate weighting of each cohort, this extrapolates to a value of 32.9% of the overall workforce – hence our confidence in saying ‘one in three workers’.

To better understand the sample population, respondents were first asked a range of demographic questions (gender, age, geography, income, household, and industry) and asked to self-select the most appropriate response in categories such as income, residence, education level, work status, job function, type of company, and industry. The main body of the survey was divided into 27 questions. Where multiple responses were possible (e.g., ‘select all that apply’), responses were rotated randomly for respondents. Where ranking of responses was required, the order of options was randomised. Refer to the glossary for different definitions used in the survey and throughout this report.

.....
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The aim of the survey is to understand the experience, expectations, and motivations of workers whose work is not location dependent

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Natalie James is a workplace relations expert with more than 20 years' experience. Natalie established Deloitte's Workplace Integrity practice, a national practice that helps businesses develop data-driven, risk-informed solutions to their workplace relations challenges.

Natalie brings deep expertise and insight into helping companies identify and resolve compliance risks, reduce complexity, and build compliant, sustainable and fit-for-future workplace practices.

Prior to her role at Deloitte, Natalie was the Fair Work Ombudsman, Australia's national workplace relations regulator, from July 2013 to July 2018. Prior to this role she was Chief Counsel for Workplace Relations for the Commonwealth.

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Dr Sean Gallagher is Director of the Centre for the New Workforce at Swinburne University and is an internationally recognised expert on the future of work. He supports leaders to help them understand the impact of disruptive change on work and how it is transforming the workforce and workplace.

Sean works with business and government across all sectors through research-informed analysis to help create value through unleashing the potential of their people. He is a chief investigator of the ARC Australian Robotics Centre, on the Tech Council of Australia's Digital Workforce Strategy Working Group, and a member of AHRI's Future of Work Advisory Panel.

Sean's research on the future of work has been widely endorsed, including by APEC, Engineers Australia, the Taiwanese Workforce Development Agency, and the Victorian government. Sean holds a PhD in chemistry.



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John Hopkins is an Associate Professor of Management for Swinburne Business School and has been one of Australia's leading researchers into flexible and remote work practices for the past decade.

During this time, John has worked on a range of FlexWork projects for both public sector and private sector clients, including the Australian Fair Work Commission, NSW Public Service Commission, Transport for NSW, and the Australian Productivity Commission.

As a result of his reputation in this field, he is also regularly invited to provide expert opinion in the local, national, and international media for outlets like Channel 7 News, ABC News, SBS World News, ABC Radio, 2SER, 3AW, *The Sydney Morning Herald*, *The Age*, *The Australian Financial Review*, *The Conversation*, *World Economic Forum*, *The Saigon Times*, and the *Hong Kong Herald*.

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Swinburne Edge believes the nature of work has fundamentally changed and that we are the workforce strategy partner you need to help navigate this shift. The engine room powering Swinburne Edge: Centre for the New Workforce(CNeW), is a dedicated research facility focused on the latest and best workforce innovation practice – the only centre of its kind nationally. CNeW drives innovation in, and across, learning and workplace wellbeing with evidence-based approaches to enable organisations to thrive. In partnership with Swinburne Edge, CNeW super-charges leaders to transform their business by building sustainable workforces for their organisations and meaningful careers for their workers. Map the path to your future workforce, today, with Swinburne Edge.

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