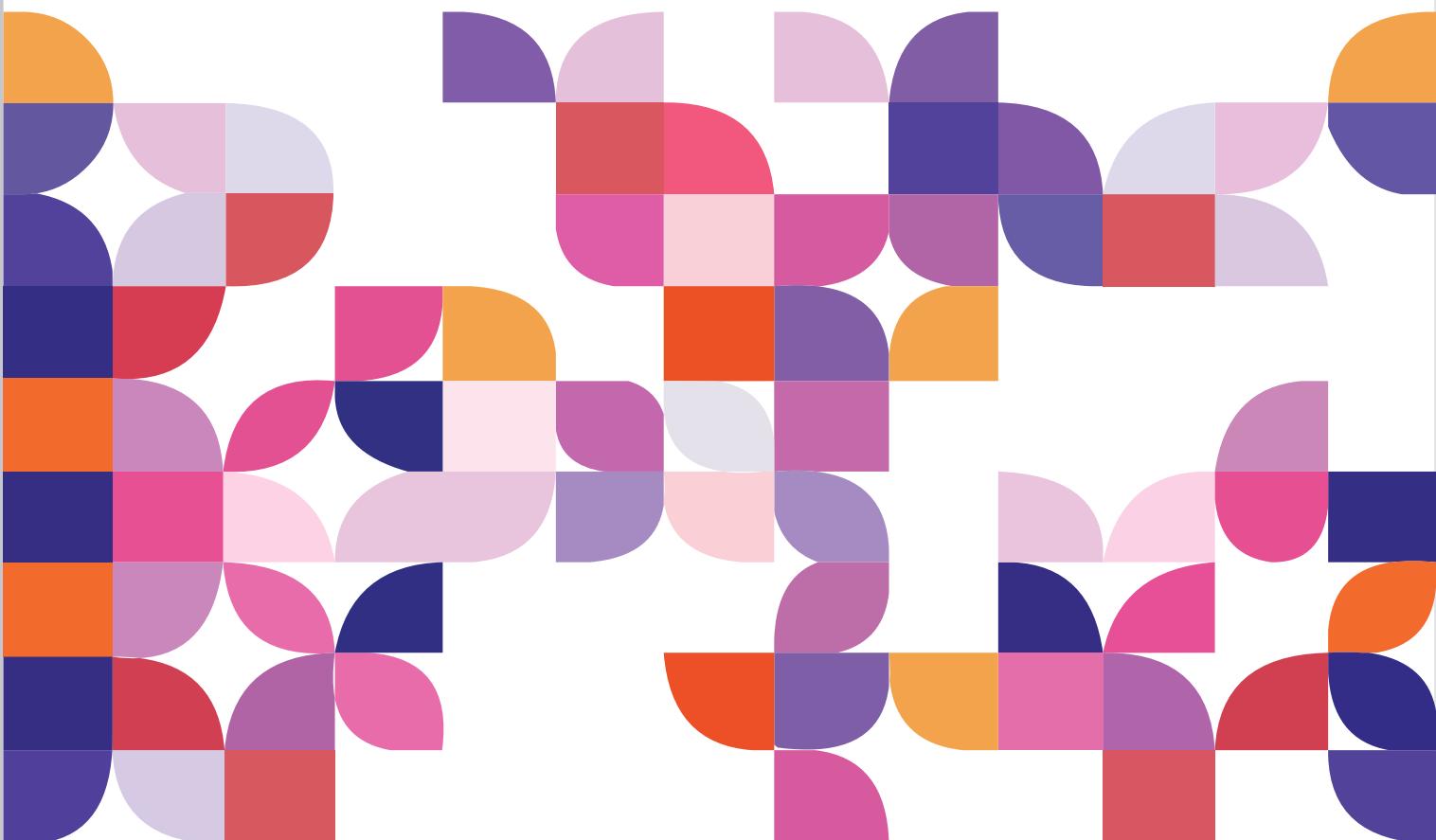


BEYOND 9 to 5:

The Future of Flexibility in
Work



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Foreword

During the time when the world was fighting and healing from the global pandemic, flexible work became a necessity. In the aftermath of this collective trauma, humankind wants to restore its normalcy. However, after experiencing one of the strictest lockdowns in the world, as newer generations enter the workforce in Singapore, there might be a shift in what was once considered normal. Seeing that flexibility at work is a mandated requirement for some employees and jobseekers while being a preference for others, it is possible that this trend is here to stay.

The need for flexible work arrangements has become undeniable to organisations as well and with that, they now have a challenge at hand — to act according to their predispositions while also ensuring that they fulfil their businesses' needs at the same time. As the newer generation enters the workforce, it is also crucial to keep their preferences in mind to attract and retain talent. Although flexible work arrangements can be beneficial to both employers and employees, whether businesses can sustain by providing these arrangements is a discourse that has been long held and discussed.

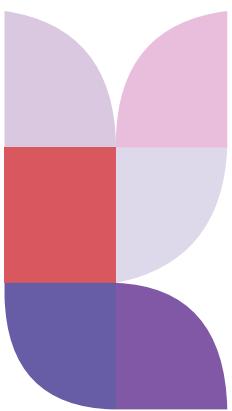
The new guidelines on FWA (flexible working arrangements) for the coming year could work in favour of those who seek flexibility at work in Singapore. This could potentially lead to businesses implementing policies and providing provisions for FWA. However, there are aspects that organisations need to be wary of prior to taking them up. Additionally they also need to recognise the benefits and downsides linked to such provisions. It is also crucial to remember that just having the provisions and policies for flexible work is not enough, employees should also be able to avail it without the fear of judgement or being reprimanded for it.

This report comes in the wake of such a revolution in the world of business to shed light on the thoughts around flexible work arrangements from both employees and employers that explores their choices, inhibitions, and potential actions around various factors of flexible working.

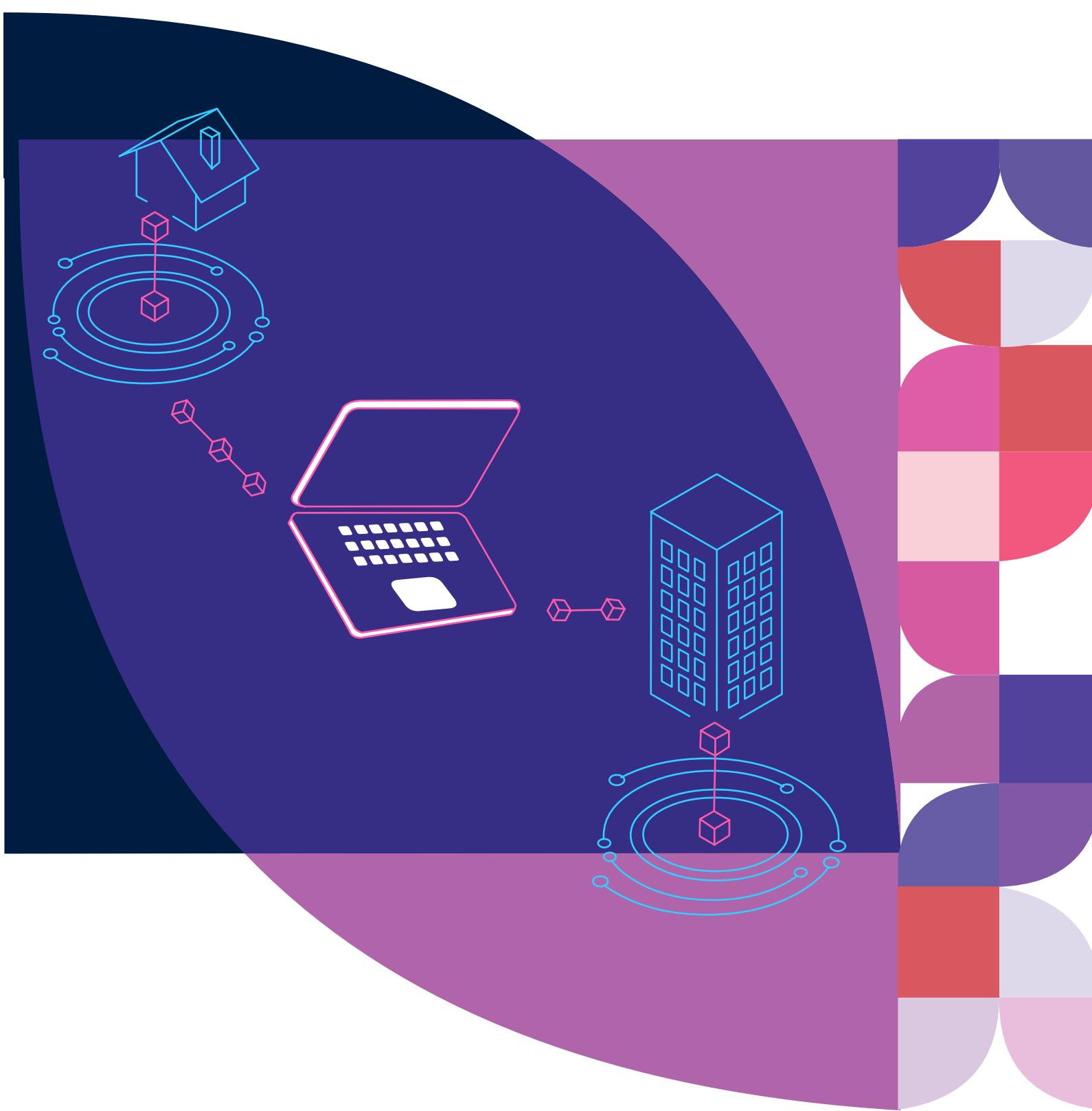




The case for flexible work: Why should we talk about flexibility at all?



Introduction

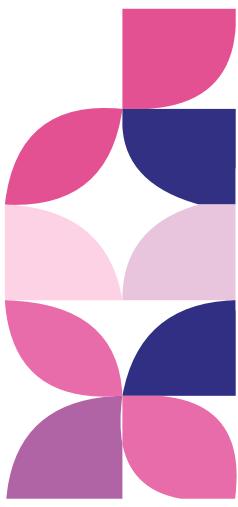


A flexible workplace is an ecosystem where employees have some or complete freedom to choose the time, location, and manner in which they work to attain the goals of the organisation without neglecting their personal goals. As the demands for healthier work environments increase worldwide, it has become crucial to acknowledge that employees have lives beyond work. With work flexibility, employers can provide them more space and liberty where the work becomes the focal point, not when, where, or how it gets done. It can be seen employees are more satisfied and more productive when given choices and alternatives to help them with their everyday lives.

When the world was struggling to cope with the pandemic, flexible working became an absolute necessity – Singapore being no exception. As a result, employees became habituated and adjusted to flexible work arrangements, which means, their preferences will likely shape the future of work. The availability of flexible working arrangements in the region is set to expand by 2024 as per the new guidelines that require employers to consider them fairly and properly, where the working method should be balanced between the needs of the companies and employees, and not only benefit one side.

With flexibility likely to expand, this report looks at how the trends are shaping up and what the future might look like.

Sources:
Work Flexibility – What Is It & Why Is It Important?, feedough, Apr 2023
Why flexible work is important in Singapore now?, HSBC, Aug 2022



Flexibility: Why is it important and why must businesses consider it?

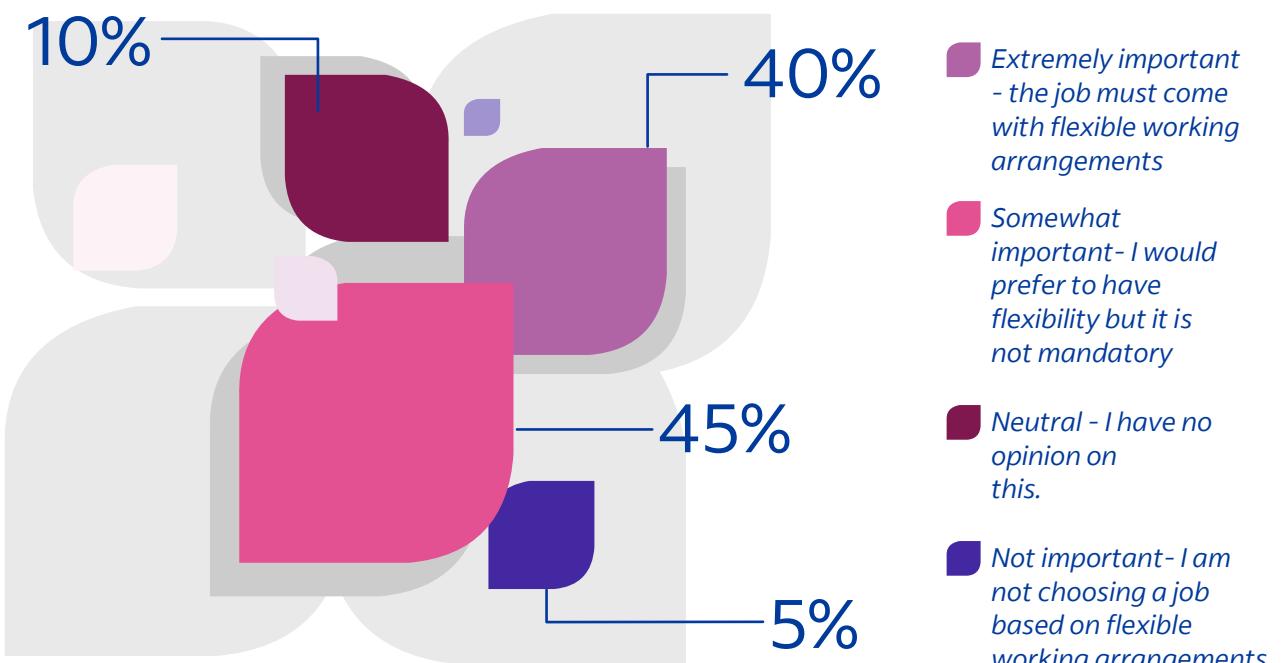
Flexible working arrangements came as a silver lining in our distressed world during the pandemic. Now that the pandemic is over, we have realised how greatly flexibility at work can improve the quality of our lives. With that in mind, we start by asking a simple question, "How important is flexibility to the workers?"

85% of employees in Singapore desire flexibility at work which is quite above the global average (66%). To 40% of the jobseekers, flexibility is extremely important whereas 45% consider it somewhat important.

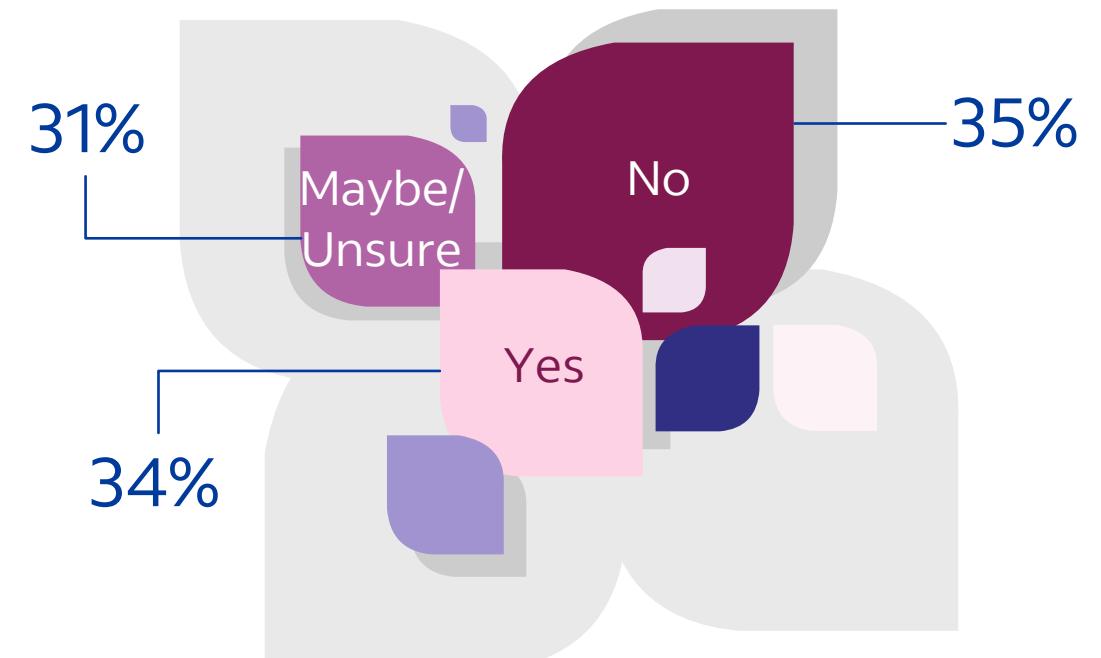
Additionally, 34% of the employees also made the shocking revelation that they would quit their jobs if the flexibility provided to them is revoked. While another 31% aren't sure about it, they too might end up quitting.

In that case, this is a clear message for organisations, in order to attract and retain talent today, flexibility is very important and should be provided in their workplaces.

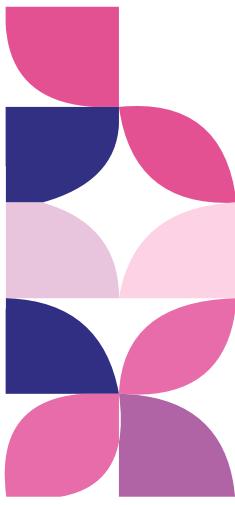
How important is flexibility for jobseekers?



Would employees leave their jobs if flexibility provision is revoked?



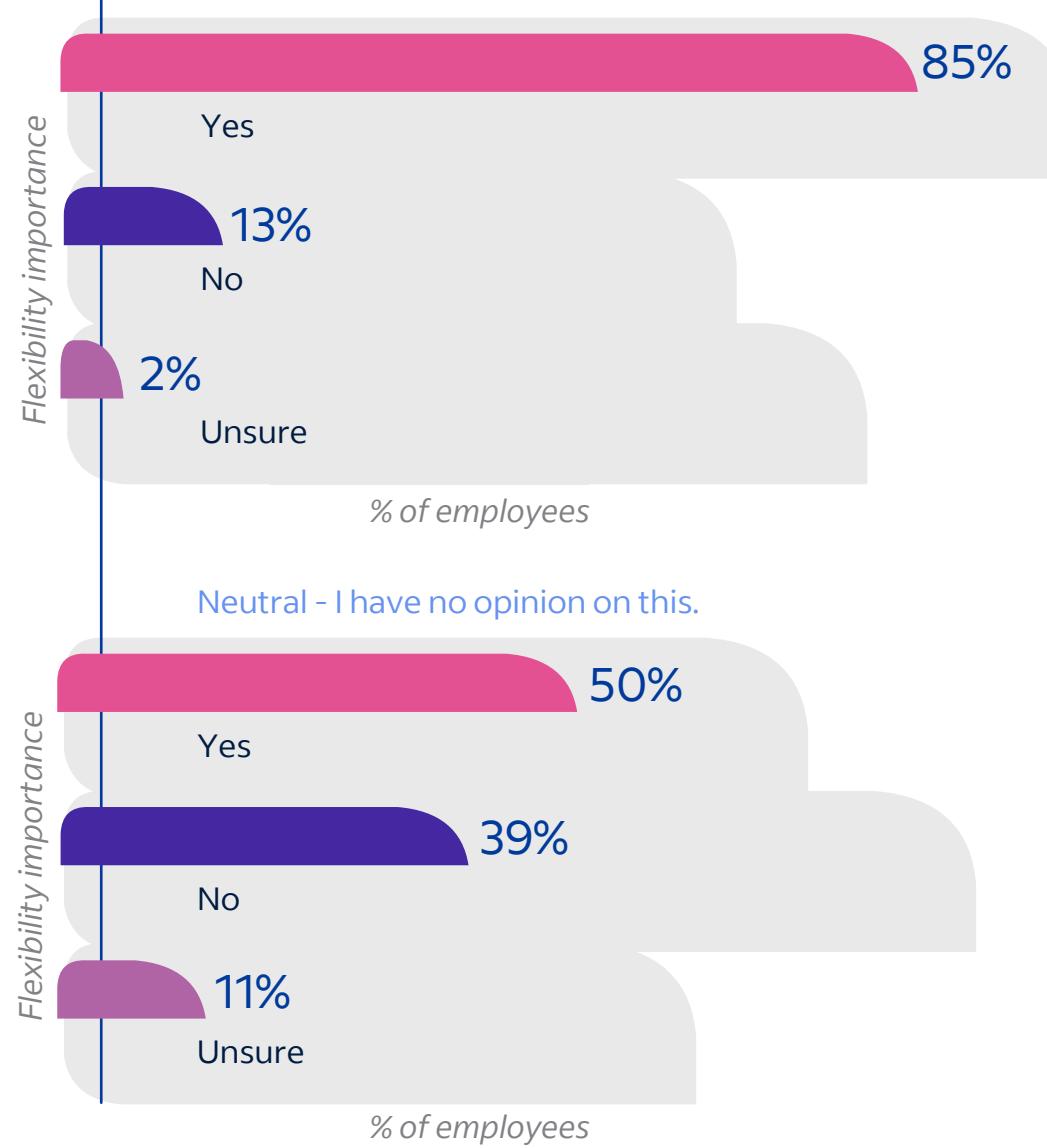
Sources : Return to the workplace 2021 global survey, Ipsos, June 2021



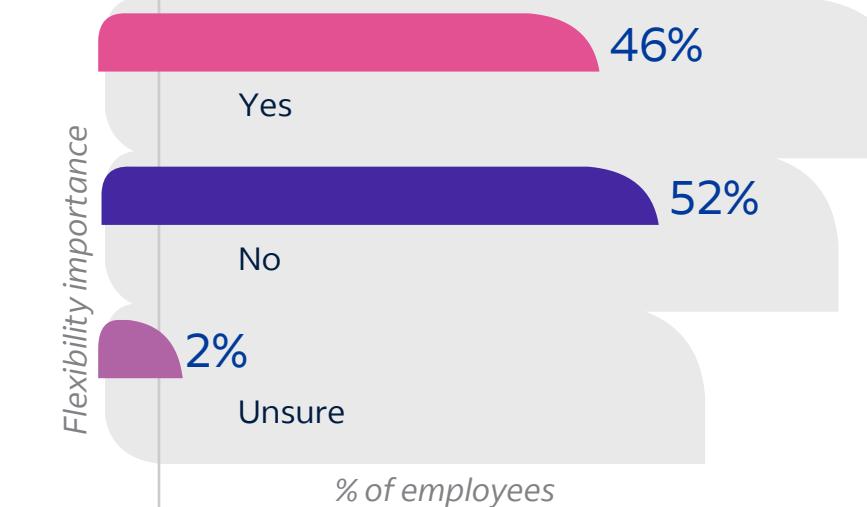
It is crucial for organisations to take employees' preferences into consideration and find ways to offer appropriate flexible arrangements — particularly, for those who deem it essential. On the bright side, we see that 85% of employees for whom flexibility is extremely important are in organisations that offer it. However, only 46% of those for whom flexibility is somewhat important — a preference but not mandatory — are in organisations that offer the same.

How important flexibility is for employees vs are they being offered it?

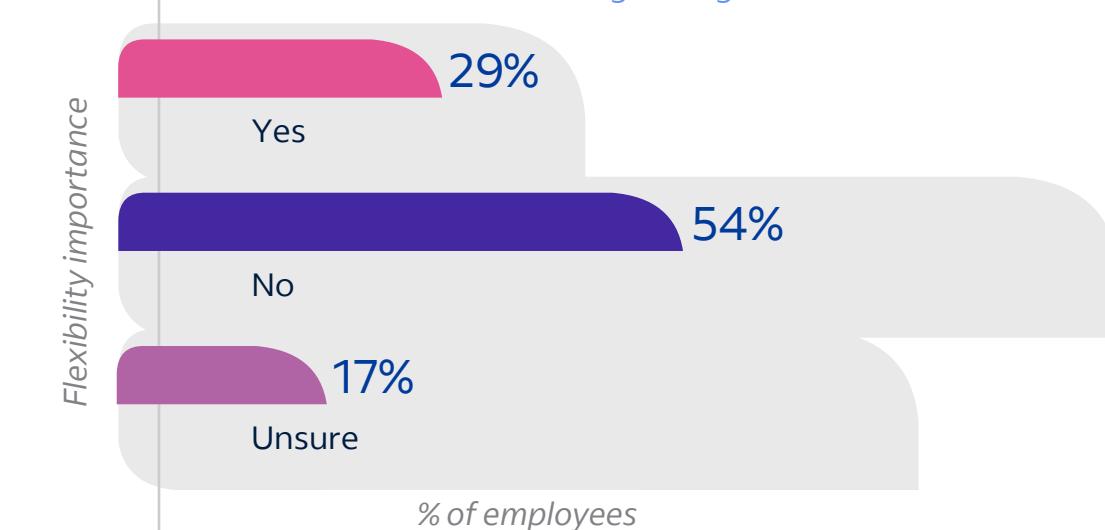
Extremely important - the job must come with flexible working arrangements

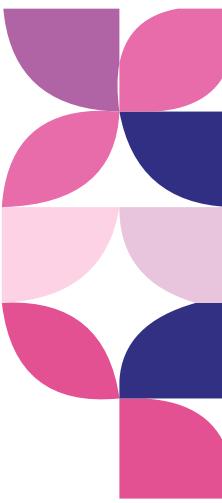


Somewhat important - I would prefer to have flexibility but it is not mandatory



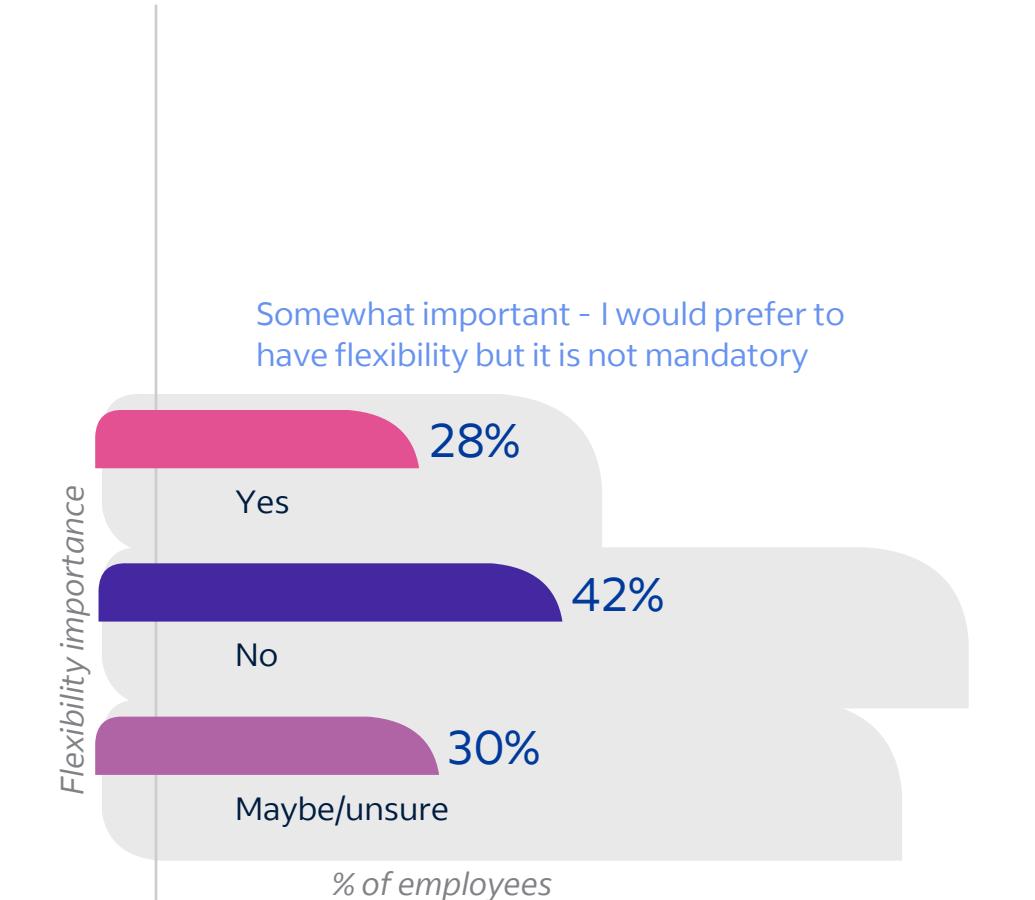
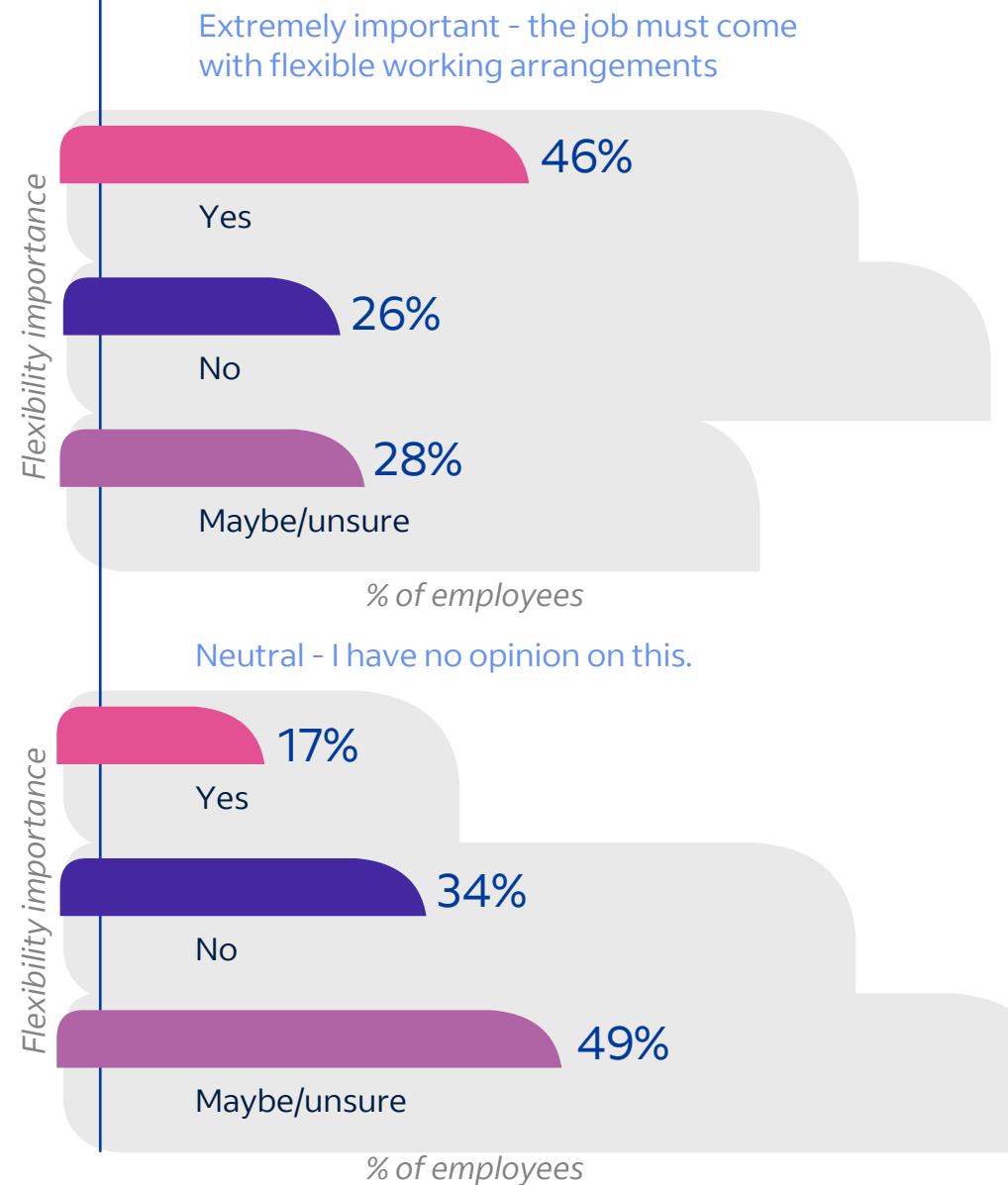
Not important - I am not choosing a job based on flexible working arrangements

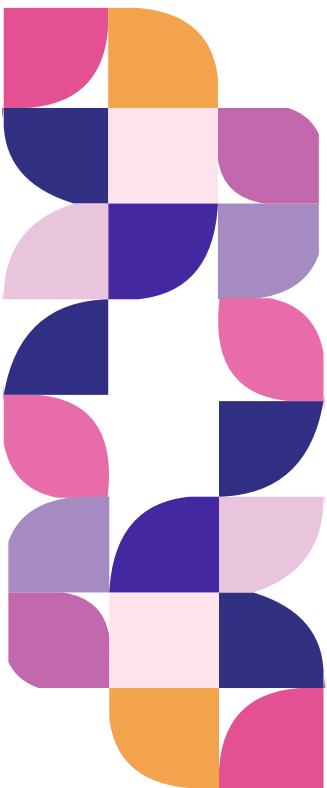




It is interesting to note that employees who consider flexibility to be very important are more likely to leave their current job if such provisions are cancelled, as suggested by 46% of employees. Even a substantial proportion of employees who consider it somewhat important (28%) and not important (27%) would leave if that were to happen. Considering this, organisations need to be more open to flexibility and also re-consider if they plan on revoking existing flexibility provisions.

How important flexibility is for employees vs would they leave if provisions were cancelled?





Flex options: Are you there?

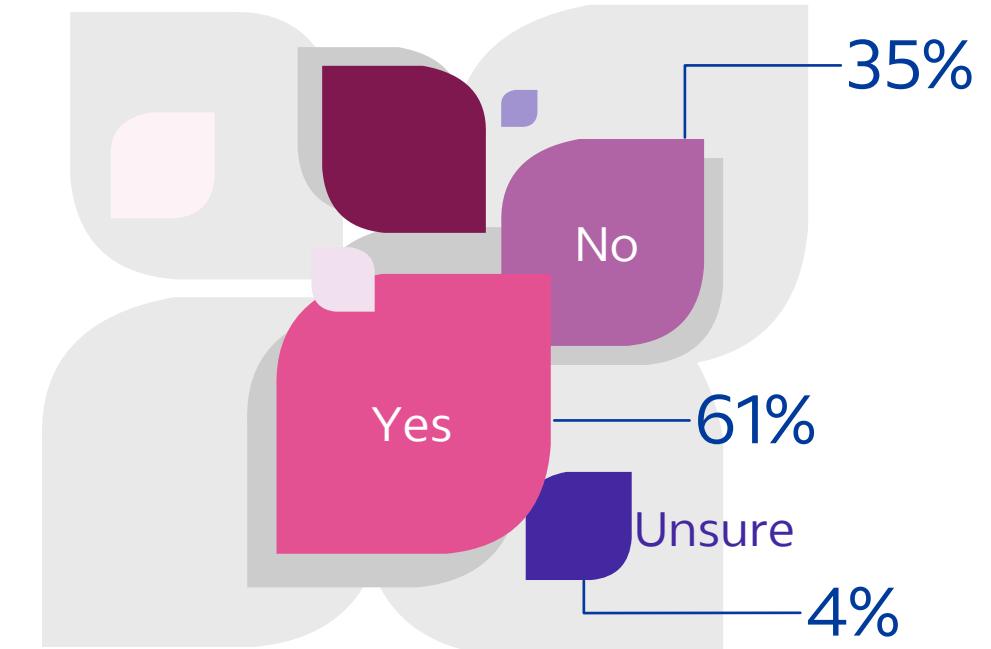
Flexible working arrangements remain a preference for some, but it is essential for many. So, we asked employers and employees alike, is flexibility being provided today?

To this, we found a very interesting response from the crowd. While flexible working appears to be ever-present at large, we see that **83%** of employers claim that their organisations provide flexibility to their employees but a lesser proportion of employees (**61%**) say that their workplace is flexible. This shows that employers' understanding of flexibility isn't the same as employees'. In other words, provisions and preferences of flexibility that employees want aren't being provided by the employers.

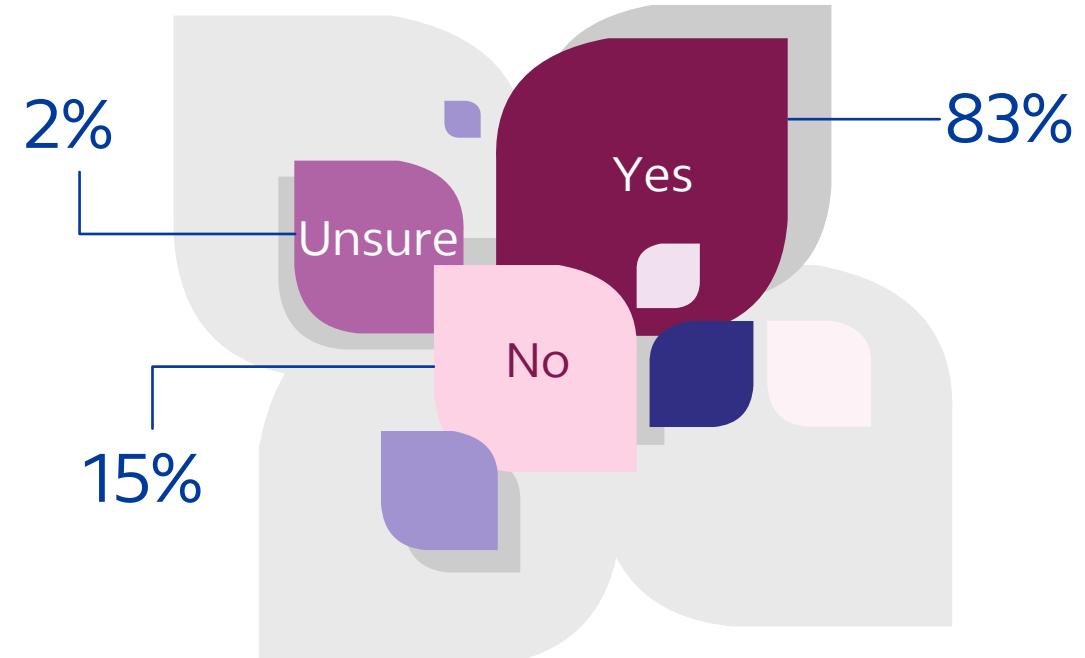
In order to bridge this gap, employers need to understand the requirements of their employees and provide flexible working provisions accordingly to become a truly flexible workplace.

Is flexibility being provided today?

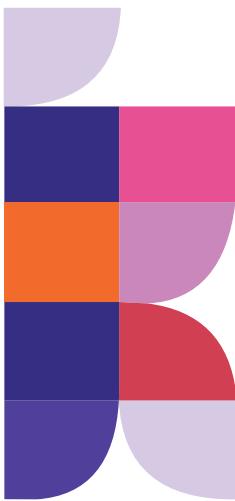
Employee opinion



Employer opinion



Perception vs. reality

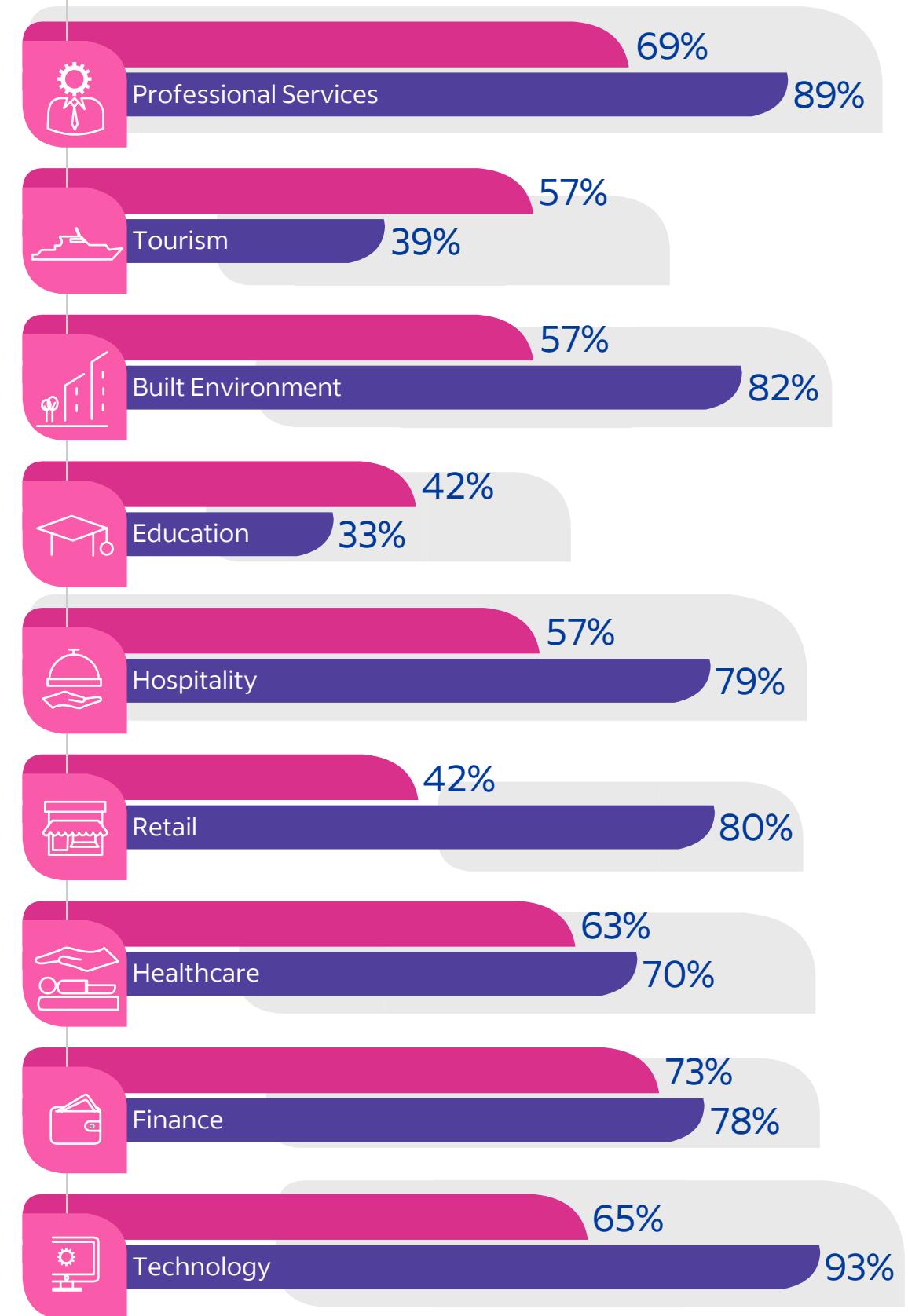


We wanted to see in which sectors the understanding of flexibility among employees and employers differ the most since different sectors have different needs depending on the type of work they do.

It was observed that the gap is the most in retail where only **42%** of employees believe that they have flexibility whereas **80%** of employers claim to provide flexible work arrangements.

Conducting surveys to understand what employees need along with a system that allows employee feedback can help organisations overcome this challenge and provide appropriate flexible work arrangements.

Sectors where the perception gap lies



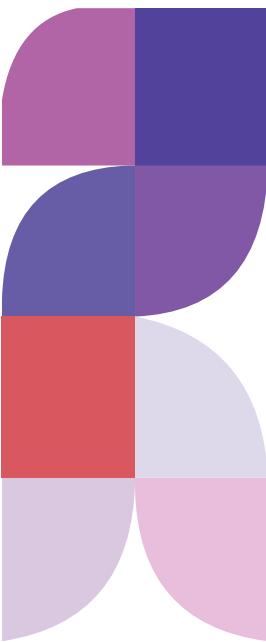
Note: The Built Environment (BE) comprises industries such as Construction, Facilities Management, Real Estate, Security, and Environmental Services (e.g. Cleaning, Waste & Pest Management).

Note: The percentages add up to more than 100 since each respondent is allowed multiple responses

Top spots where flexibility reins

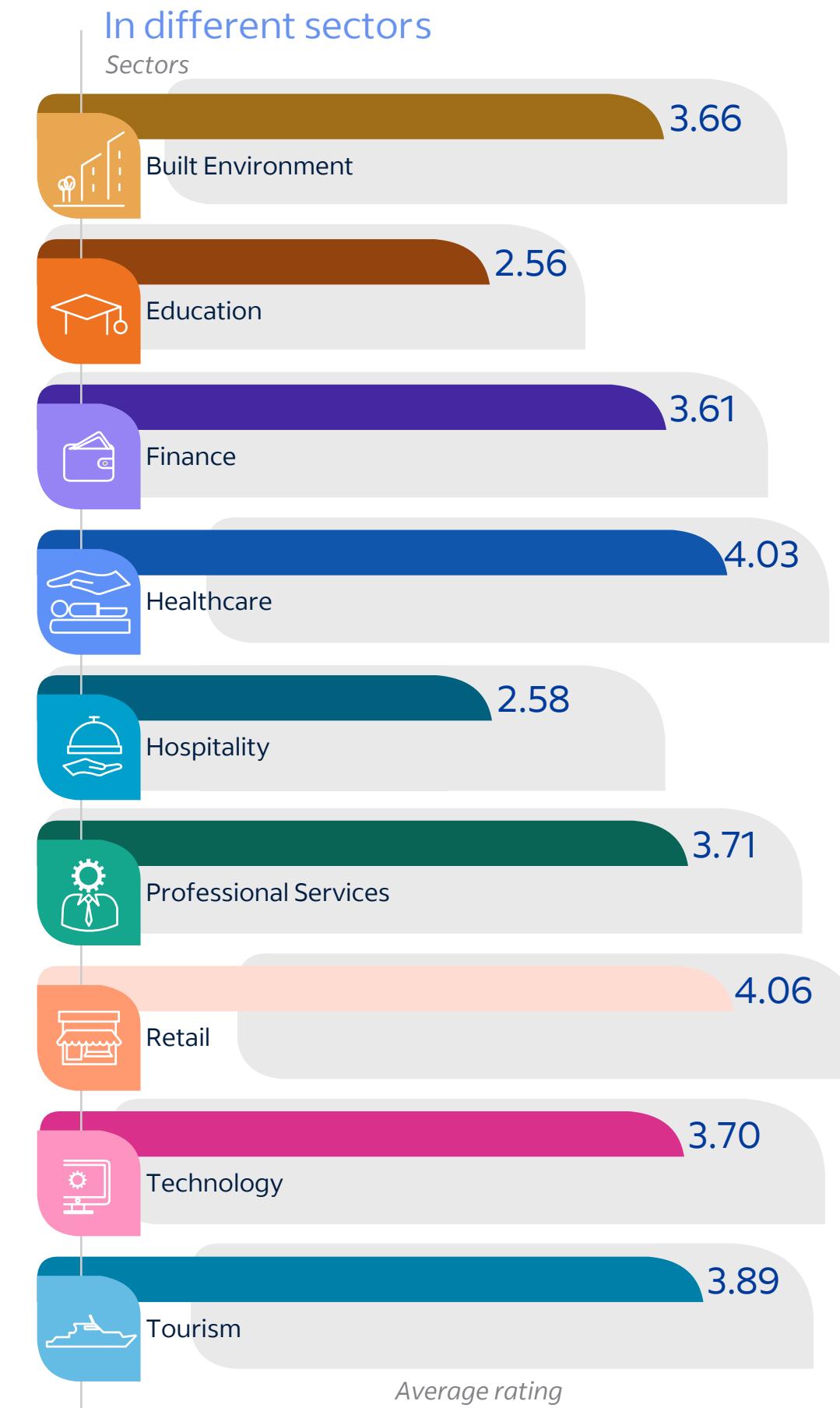
This section gives an overview of the flexibility that employers believe they provide in their organisations. We compare these perceptions to determine where flexibility is abundant.

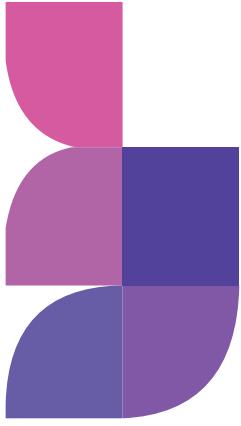
Sectors such as retail (rated **4.06** out of 5) and healthcare (**4.03**) claim to be the most flexible, whereas education (**2.56**) and hospitality (**2.58**) sectors fall short. Interestingly, as seen earlier, retail is also a sector where not as many employees are content with the flexibility provided to them.



Note: The Built Environment (BE) comprises industries such as Construction, Facilities Management, Real Estate, Security, and Environmental Services (e.g. Cleaning, Waste & Pest Management).

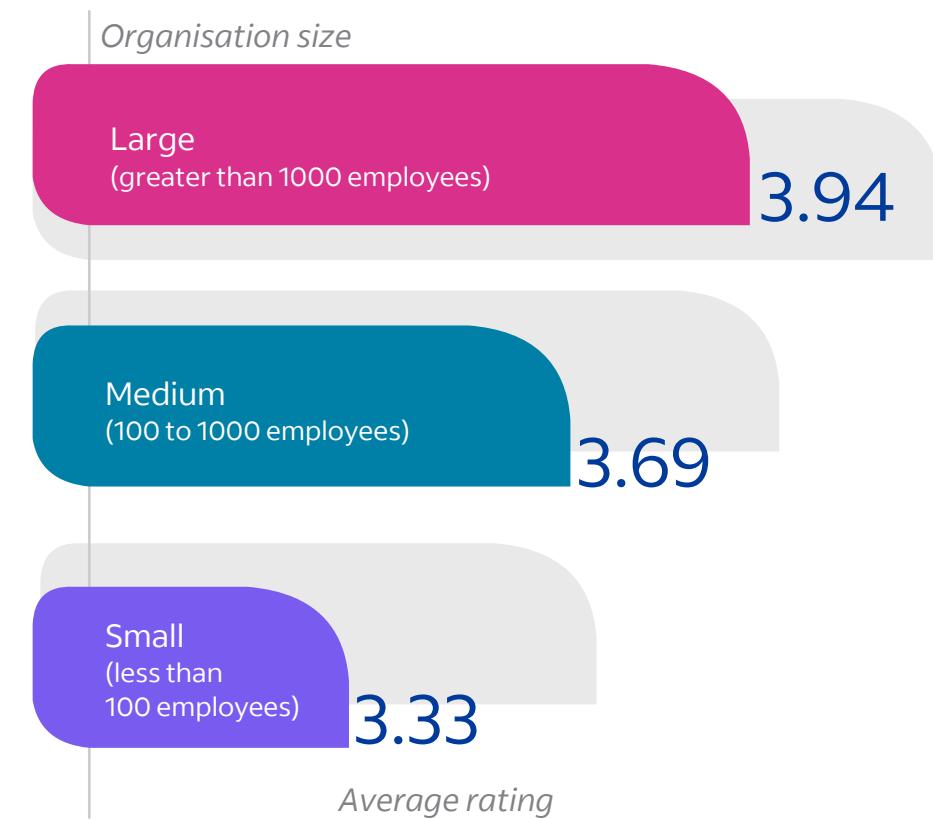
To what extent do employers think their workplace is flexible?





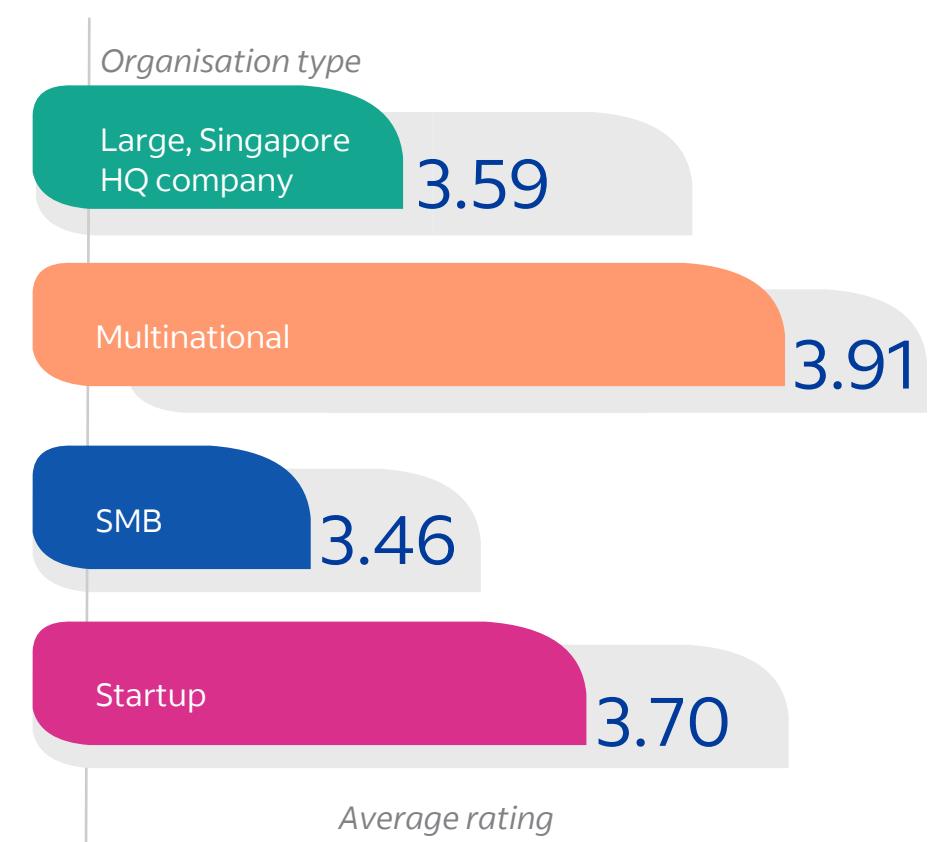
Across organisation sizes, employers in larger organisations believe they are more flexible (rated **3.94** out of 5) when compared to medium (**3.69**) and small sized organisations (**3.33**).

In different organisation sizes



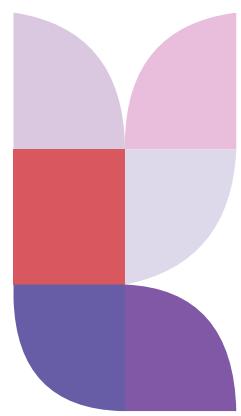
When it comes to organisation types, multinational organisations believe they offer more flexibility (**3.91**) compared to startups (**3.70**), large companies (**3.59**), and SMBs (**3.46**).

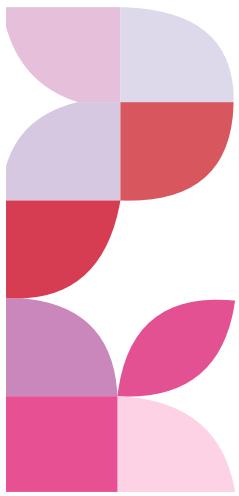
In different organisation types





The balance of flexibility: Assessing the impact of flexible working arrangements





In the employees' shoes: Weighing the pros and cons

Employees experience many benefits from flexible working. The most prominent one is that they have more time for their personal life, according to 54% of employees; followed by high productivity (16%) at the workplace. Employees also enjoy working from wherever they would like (13%) and believe that it improves their mental health and wellbeing (12%).

What is the greatest benefit of flexible working?

Benefits



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On the flip side, employees also realise that there are drawbacks to flexible working. 31% of employees cite communication, collaboration, and team coordination difficulties and 22% say that they are either expected to work more or end up working longer hours.

In such cases, organisations need to develop strategies to tackle the challenges that arise out of flexible working.

What is the greatest con of flexible working?

Cons



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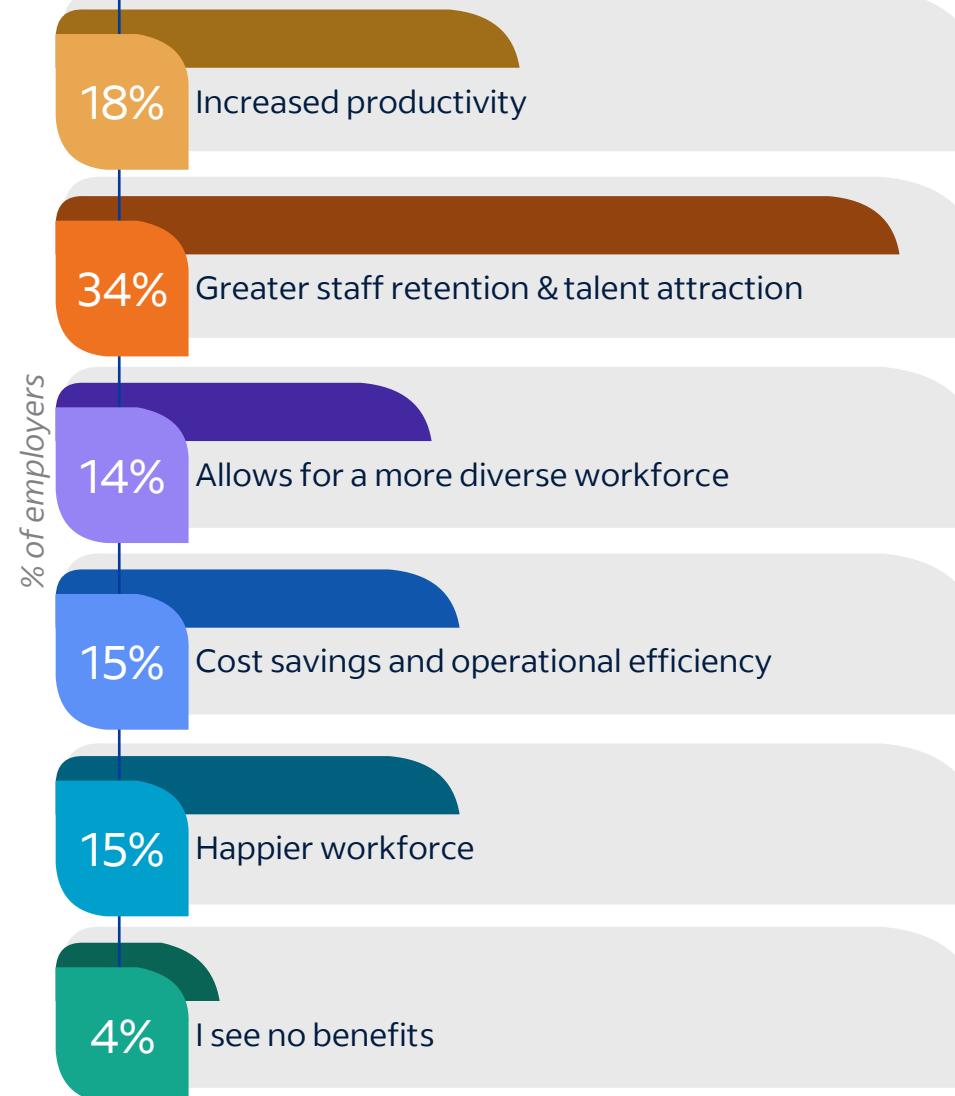
The employers' dilemma: Weighing the pros and cons

When talking to the employers, the biggest benefit of flexible working that they cite is greater staff retention & talent attraction (34%) followed by increased productivity (18%).

Interestingly, the more flexible an organisation is, the more they believe it impacts talent attraction and retention. Whereas organisations that are less flexible argue that flexibility doesn't impact talent attraction and retention that much.

What is the greatest benefit of flexible working?

Benefits

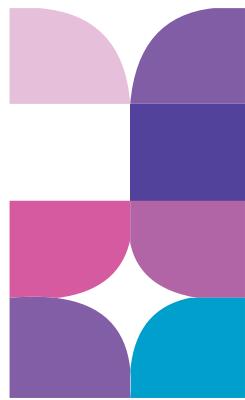


As for the cons, even employers believe that there is less shared culture between teams (24%). 22%, on the other hand, struggle to manage workload and deadlines. 15% of employees have a hard time in ensuring that provisions are fair and as per employees' expectations.

What is the greatest con of flexible working?

Cons





The transformative power of flex work

Flexibility greatly impacts the overall comfort of the employees which can lead to greater job satisfaction. According to them, flexibility makes them feel productive (rated **3.62** on a scale out of 5) and provides a greater work-life balance (**3.51**). Mental health and wellbeing, although not impacted as much, are still considerably affected due to flexibility (**3.14**).

Impact of flexibility

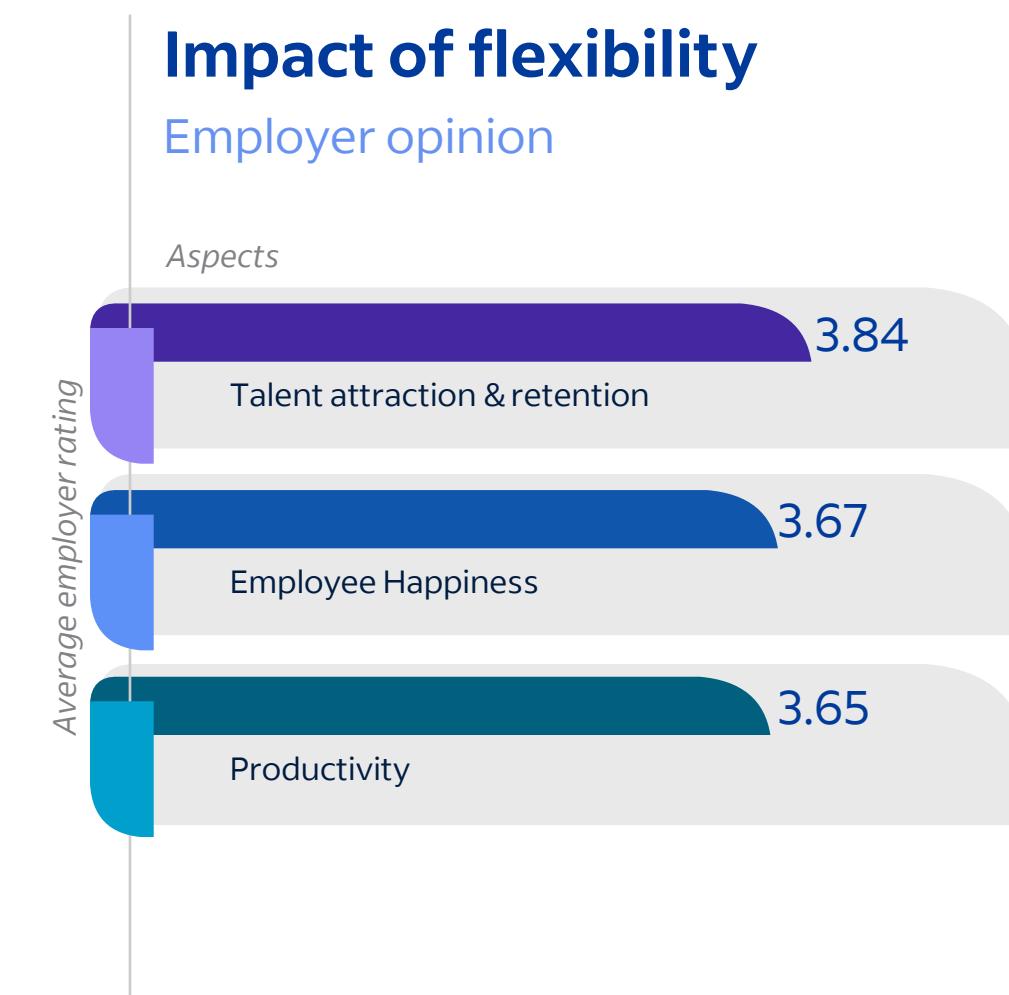
Employee opinion



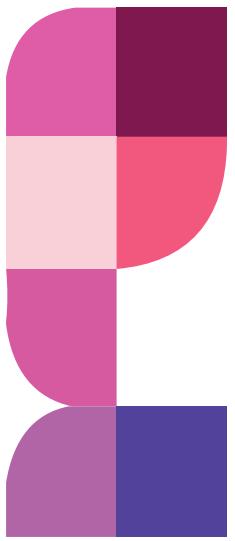
Employers have also confirmed that productivity increases (rated **3.65** on a scale out of 5) with greater flexibility provisions. In addition to that, they also believe employees are happier (**3.67**) when flexibility is provided which in turn promotes talent attraction & retention (**3.84**). This shows that employees are content with their jobs and experience better job satisfaction with flexibility.

Impact of flexibility

Employer opinion



Rated on a scale of 1 to 5 on flexibility levels provided by organisations, where '1' stands for 'Not flexible at all' and '5' stands for 'Extremely flexible'

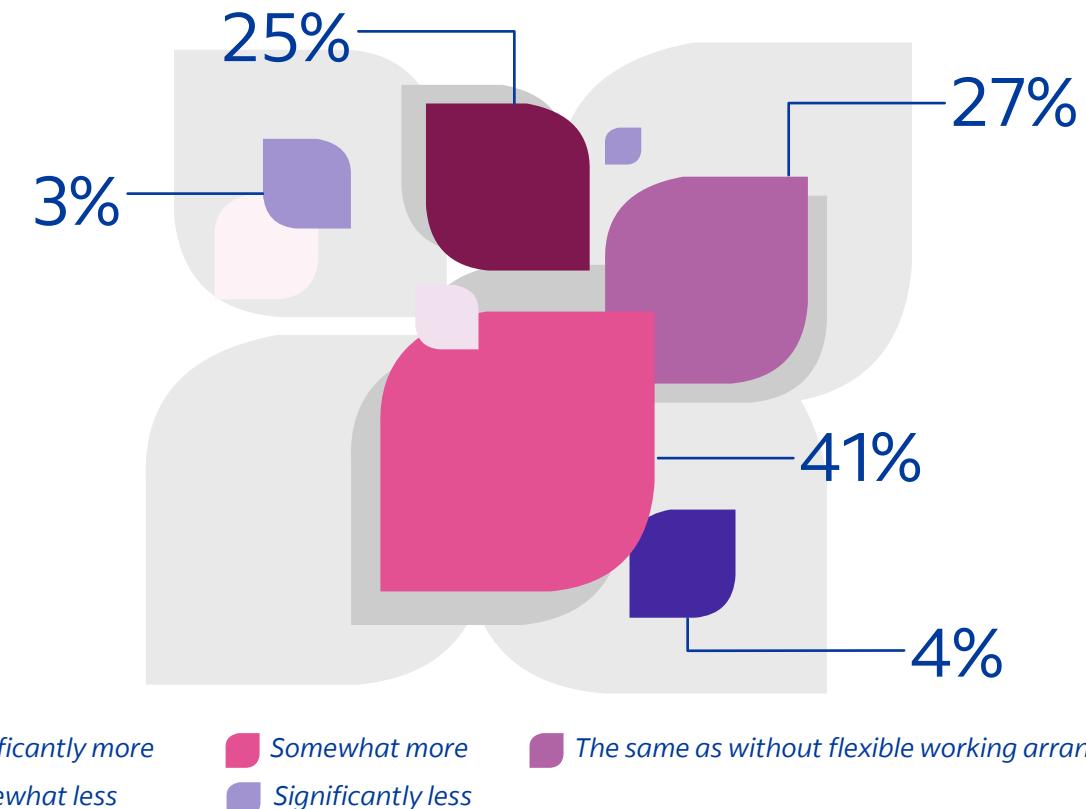


How productive are employees with flexibility?

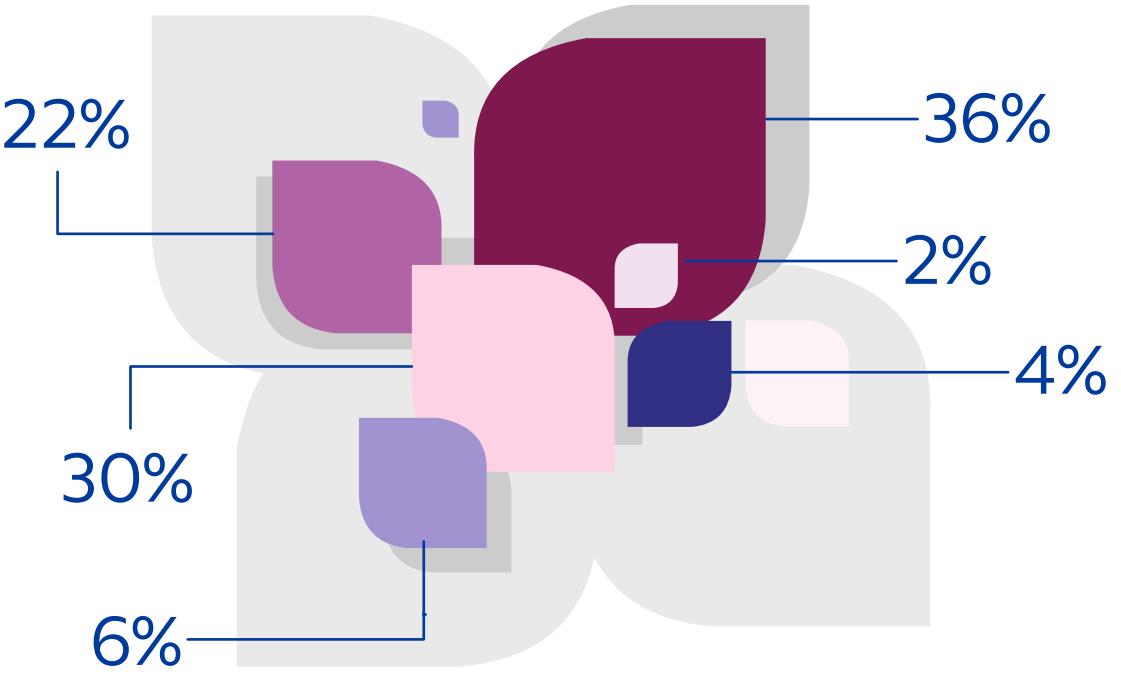
We already know that flexibility leads to increased productivity. But to what extent do employees feel productive in a flexible setting?

A quarter of employees (25%) feel significantly more productive due to flexibility whereas 41% of them feel somewhat more productive. 27% believe flexibility does not have any impact on their productivity. A similar perception is seen among employers too. 30% of employers believe employees in their organisations are significantly more productive, 36% believe they are somewhat more productive, and 22% believe it does not have an impact on their employees' productivity. The silver lining is that only 3% of employees and 6% of employers believe productivity has gone down with the implementation of flexible working arrangements.

Employee opinion

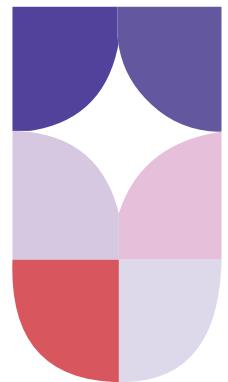


Employer opinion





Tailoring work to fit: Types of flexible work and employee preferences

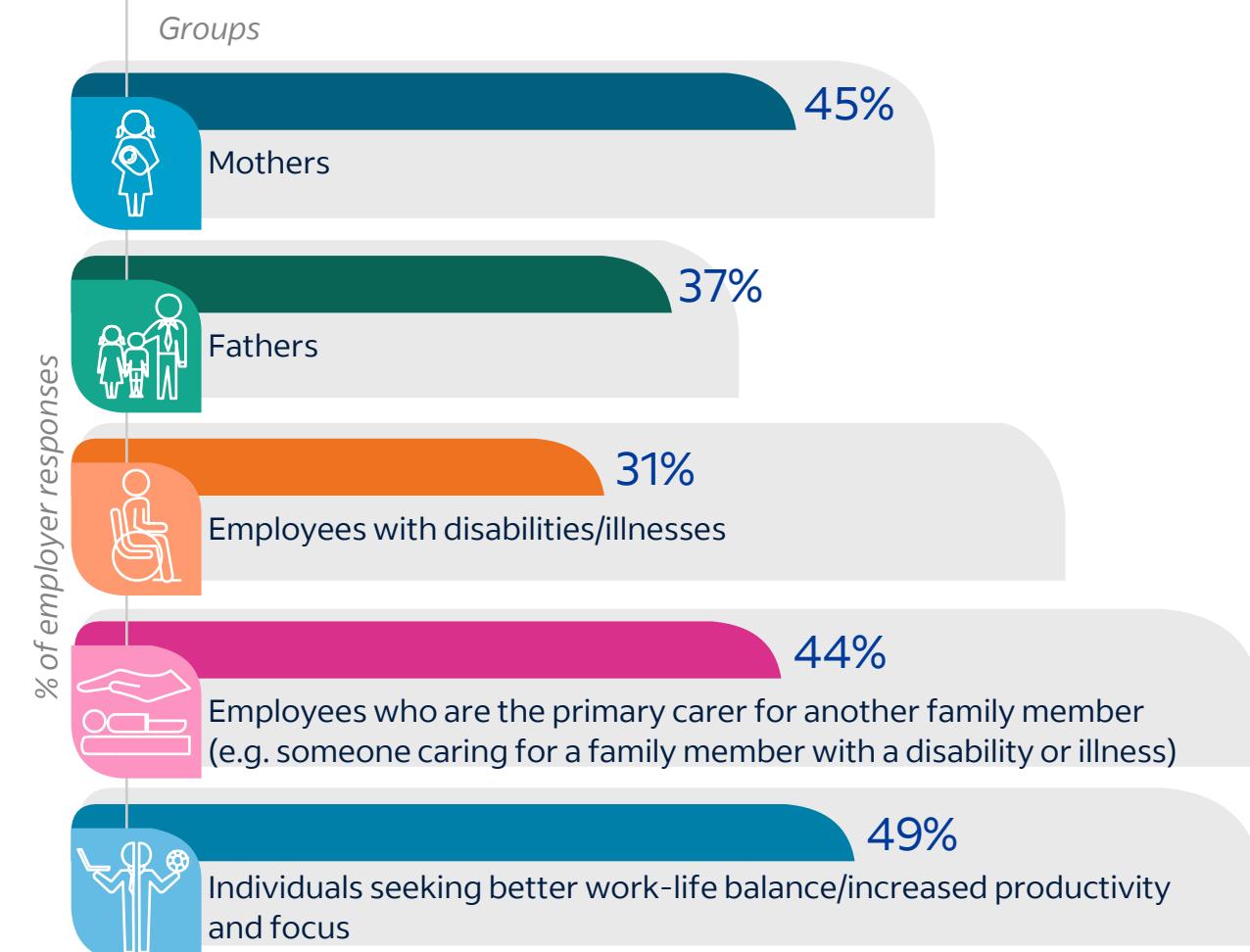


Flexibility for all?

To understand the wide array of flexible work arrangements that are necessary today, we need to understand who has access to it. In addition to mothers (45%), fathers (37%) caregivers (44%), and people with disabilities/illness (31%), flexibility is also provided to the people who seek better work-life balance/increase productivity at work (49%).

Interestingly, 58% of large organisations offer flexibility to mothers, which is more than the proportion of medium (39%) and small sized organisations (48%) offering it. A similar proportion of large organisations also offer flexibility to primary carers, more than medium and small-sized organisations.

Who are flexibility provisions offered to the most?

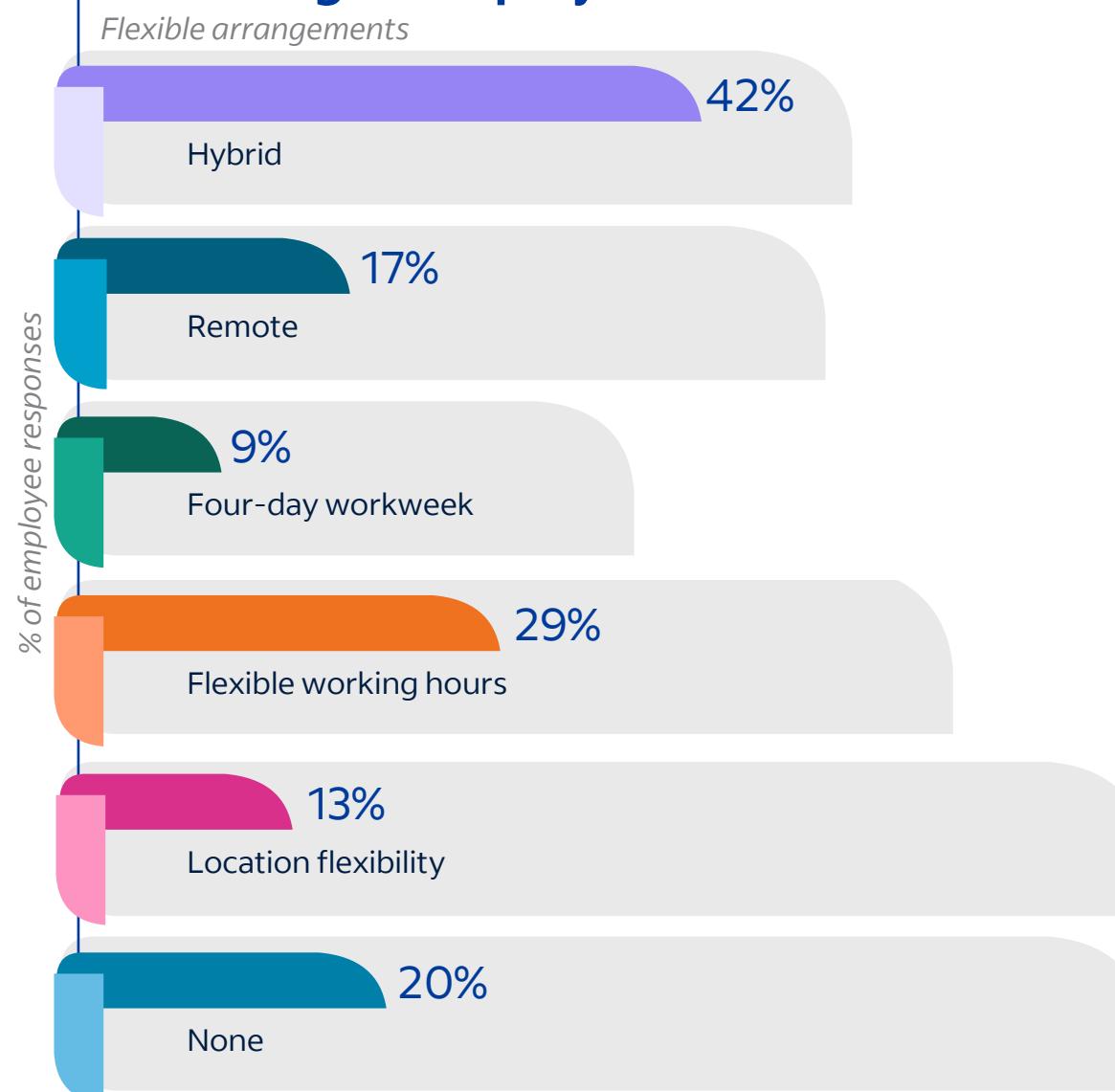




The flexibility spectrum: A look at contemporary work arrangements

Employee responses suggest that the flexible arrangement provided to them the most is hybrid (42%), followed by flexible working hours (29%). Shockingly, a significant number of people (20%) are not offered any type of flexible work arrangements, followed by 17% who are provided with remote work.

Flexible arrangements offered according to employees

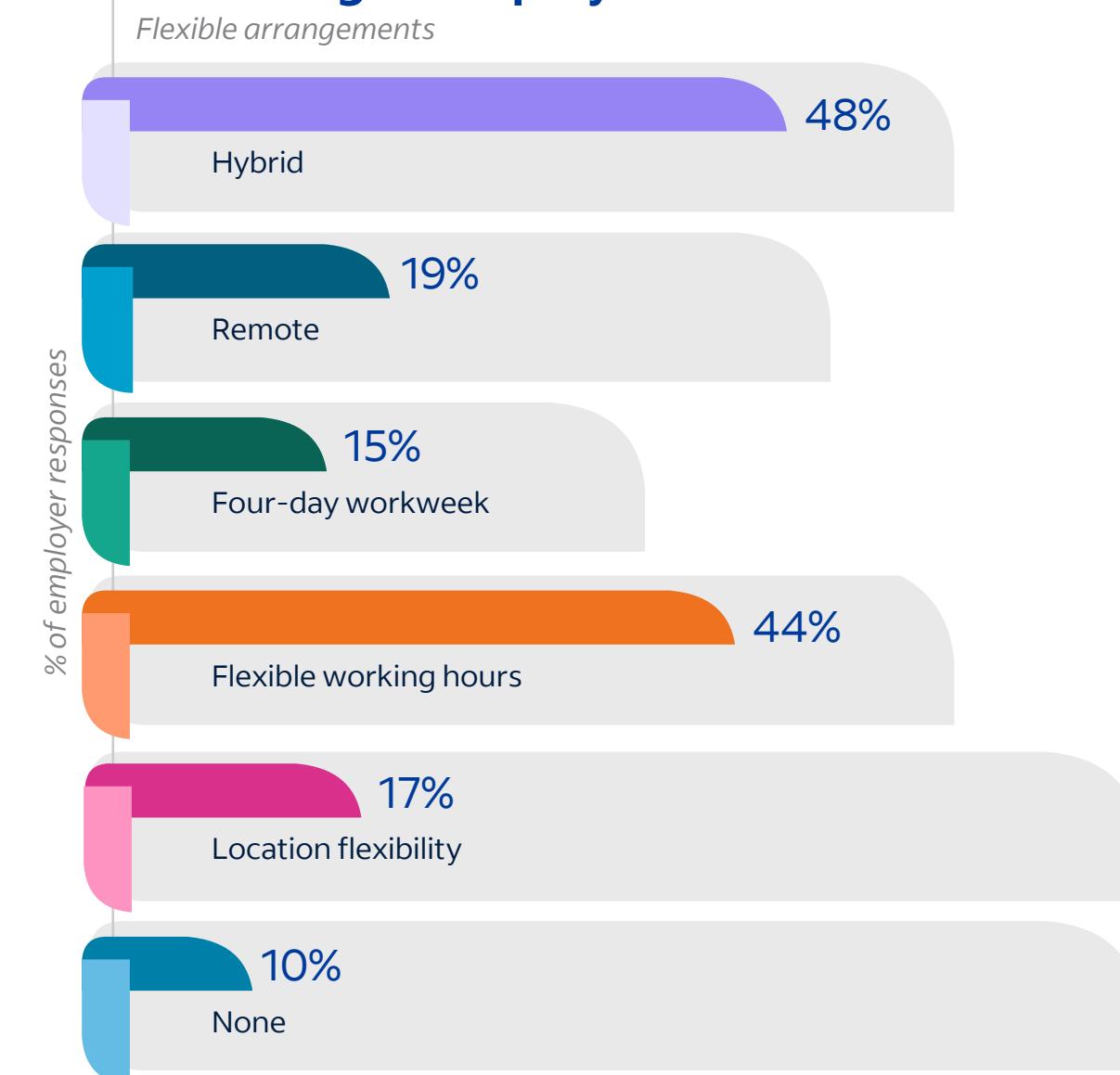


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Employer responses confirm that hybrid (48%), flexible working hours (44%), and remote work (19%) are indeed the most provided arrangements today. In addition to these, employers also claim that location flexibility (17%) and a four-day workweek (15%) are other arrangements offered.

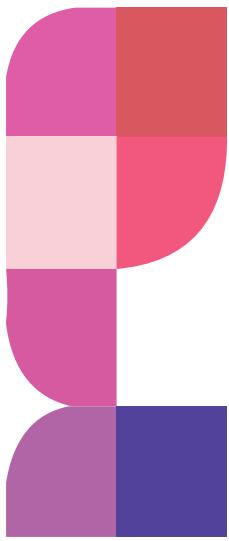
Interestingly, only 10% state they do not offer any flexible working arrangements further highlighting the disconnect between employers and employees regarding flexible work.

Flexible arrangements offered according to employers



Note: The percentages add up to more than 100 since each respondent is allowed multiple responses

Beyond 9 to 5: The Future of Flexibility in Work



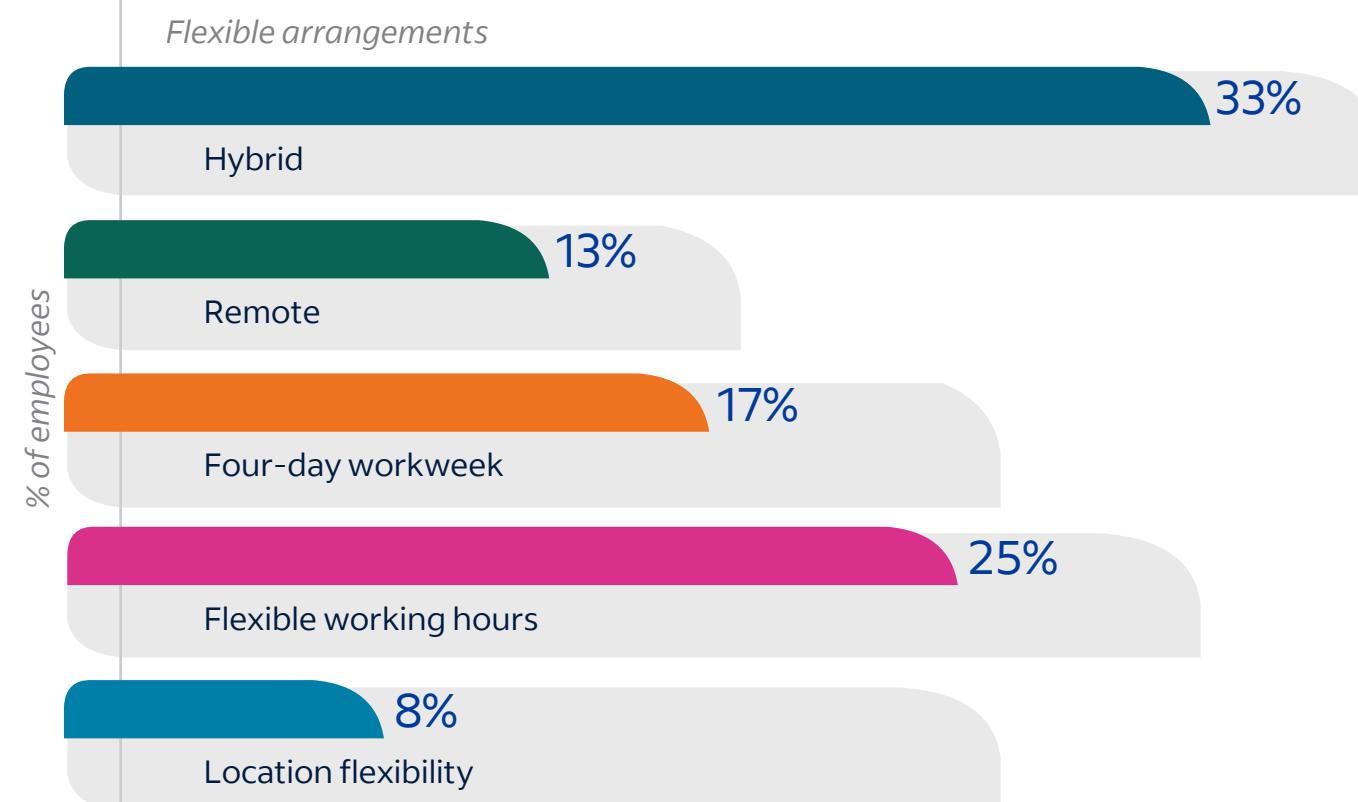
Employees voice preferences for flexible work arrangements

One in every three employees prefers hybrid work arrangements, whereas a quarter of them prefer flexible working hours instead. On the other hand, 17% of them have a preference for a four-day workweek. Additionally, 13% would like to work remotely.

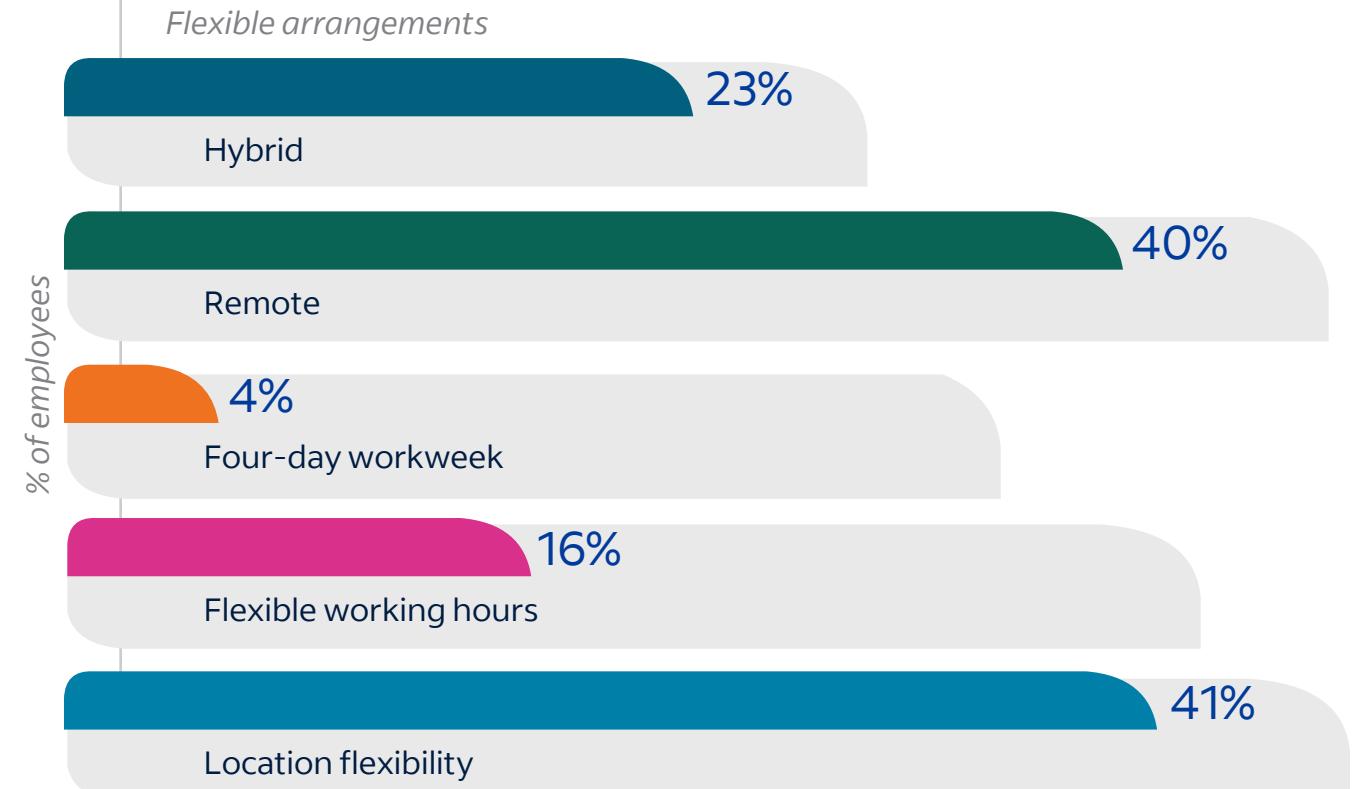
Seeing a wide array of flexibility preferences among employees, the question that arises now is, 'Are their preferences taken into consideration?' Interestingly, organisations should note that only 21% of employees are in organisations that offer the work arrangements they prefer.

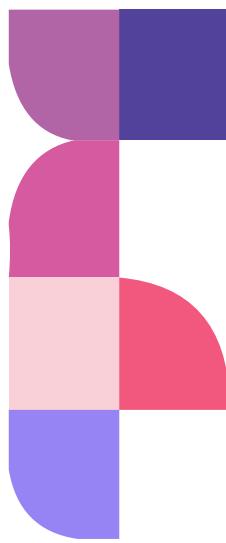
A scarce 4% of the employees who prefer a four-day work-week are in organisations that offer it. Among sectors however it was found that 58% of the hospitality industry offers a four-day workweek, which was the most compared to the other sectors. Also, just 16% of employees who prefer flexible working hours are employed in organisations that offer it. Similarly, only 23% who prefer a hybrid setup have the opportunity to avail it. Almost 40% employees who prefer remote work, work in organisations that can provide these arrangements to them. Overall, it's clear that the larger chunk of employees do not work in organisations that offer the same flexible arrangements as their preference.

Flexible arrangements preferred by employees



Employees who have access to their preferred flexible work arrangement



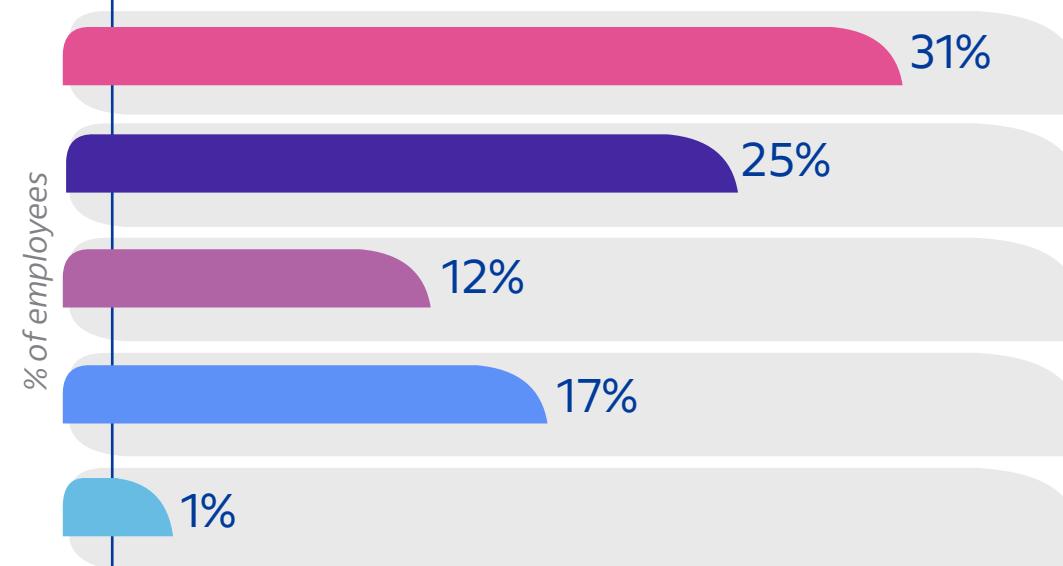


Flexibility choices across the spectrum

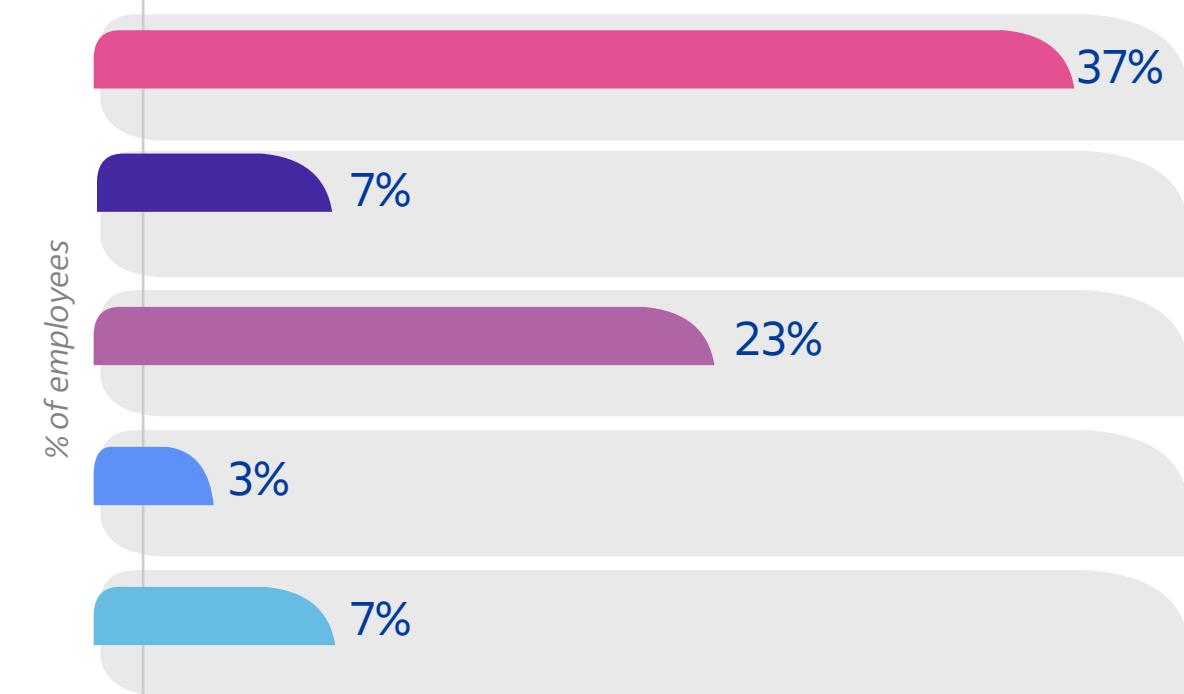
With the indispensable need to take employees' flexibility preferences into consideration, a look at these varying preferences across demographics could give organisations a better idea to act upon it. Preference for flexibility varies slightly across different demography and hierarchical levels. Across hierarchies, more entry-level (31%), middle-level (37%) and senior-level employees (29%) prefer hybrid arrangements.

Seniority Level

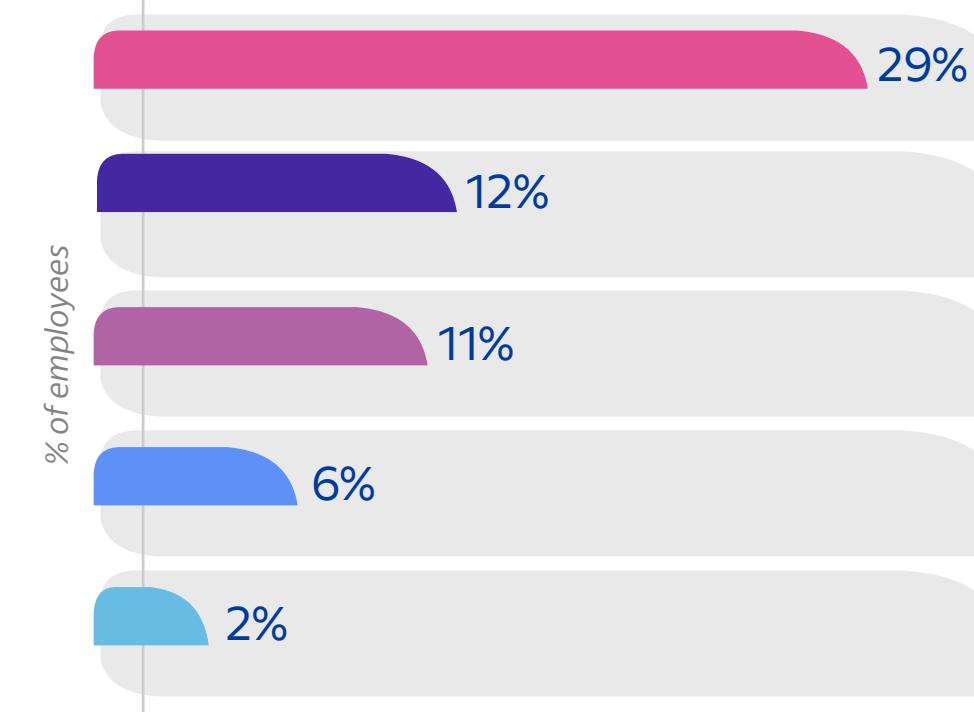
Hierarchical level: Entry / Junior Level (0-5 years)



Hierarchical level: Middle Level (5-10 years)



Hierarchical level: Senior Level (10+ years)



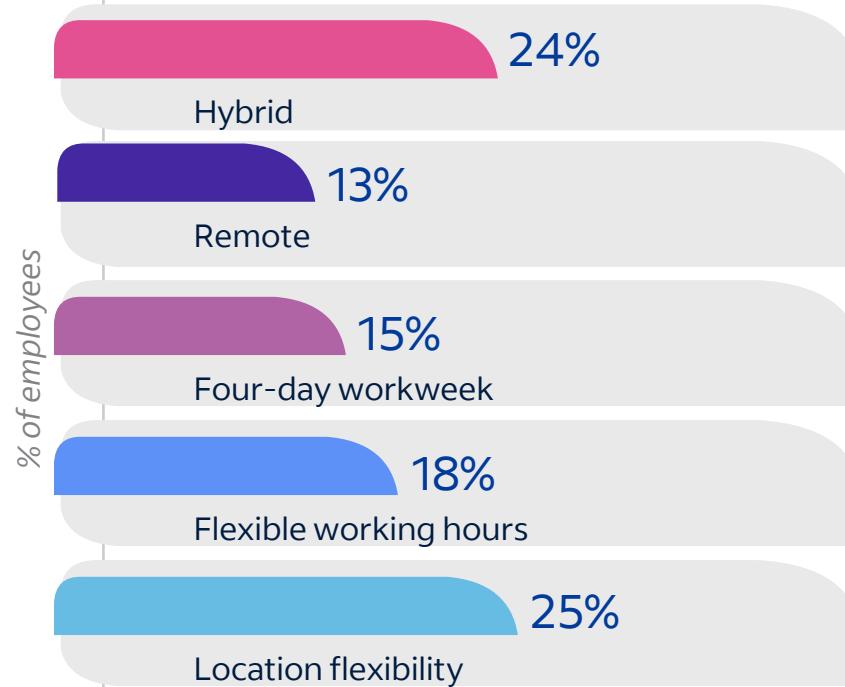
Legend:
Hybrid (pink), Remote (dark blue), Four-day workweek (purple), Location flexibility (light blue), None (light grey)

Note : The Built Environment (BE) comprises industries such as Construction, Facilities Management, Real Estate, Security, and Environmental Services (e.g. Cleaning, Waste & Pest Management).

Age groups

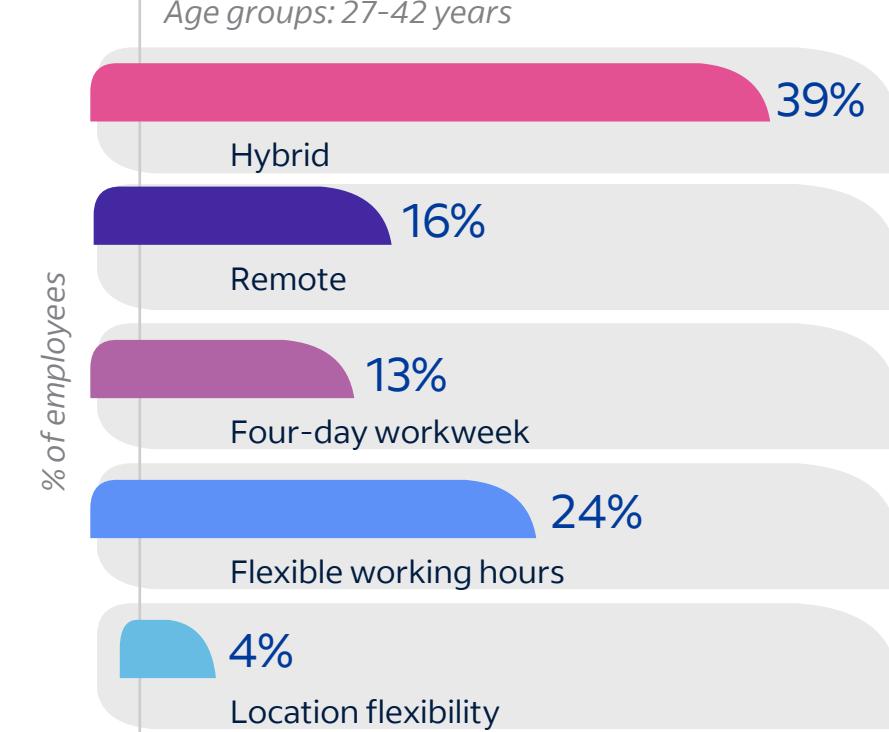
Across age groups, the Gen Z (born between 1997-2012) mostly prefer hybrid (24%) and location flexibility (25%). Meanwhile, Millennials (born between 1981-1996) mostly prefer hybrid (39%) and flexible working hours (24%). Gen X and older (born between 1965-1980) also have similar preferences as millennials; they too mostly prefer hybrid (30%) and flexible working hours (29%).

Age groups: 18-26 years

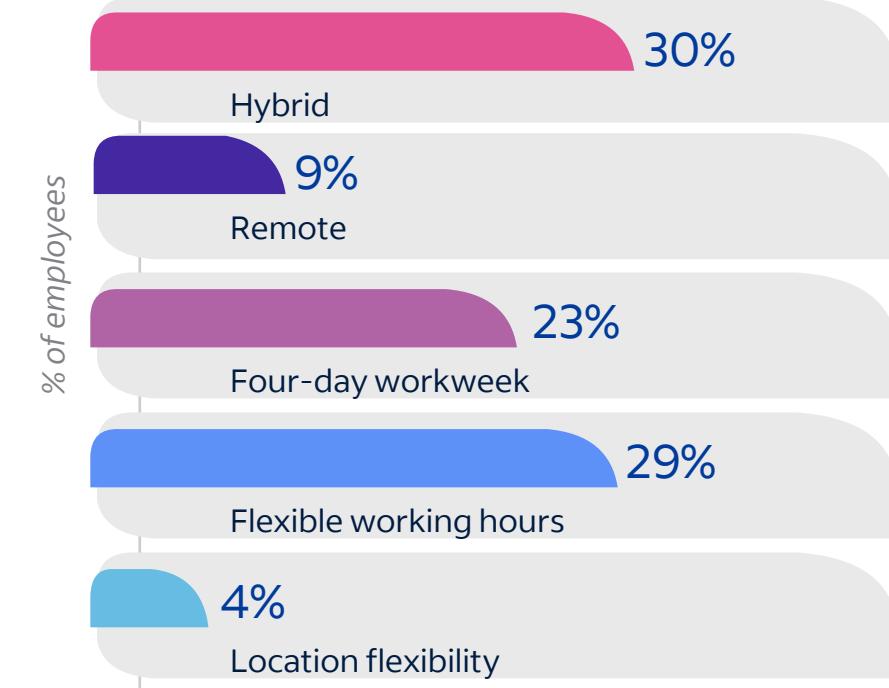


█ Hybrid █ Remote █ Four-day workweek █ Location flexibility
█ None

Age groups: 27-42 years



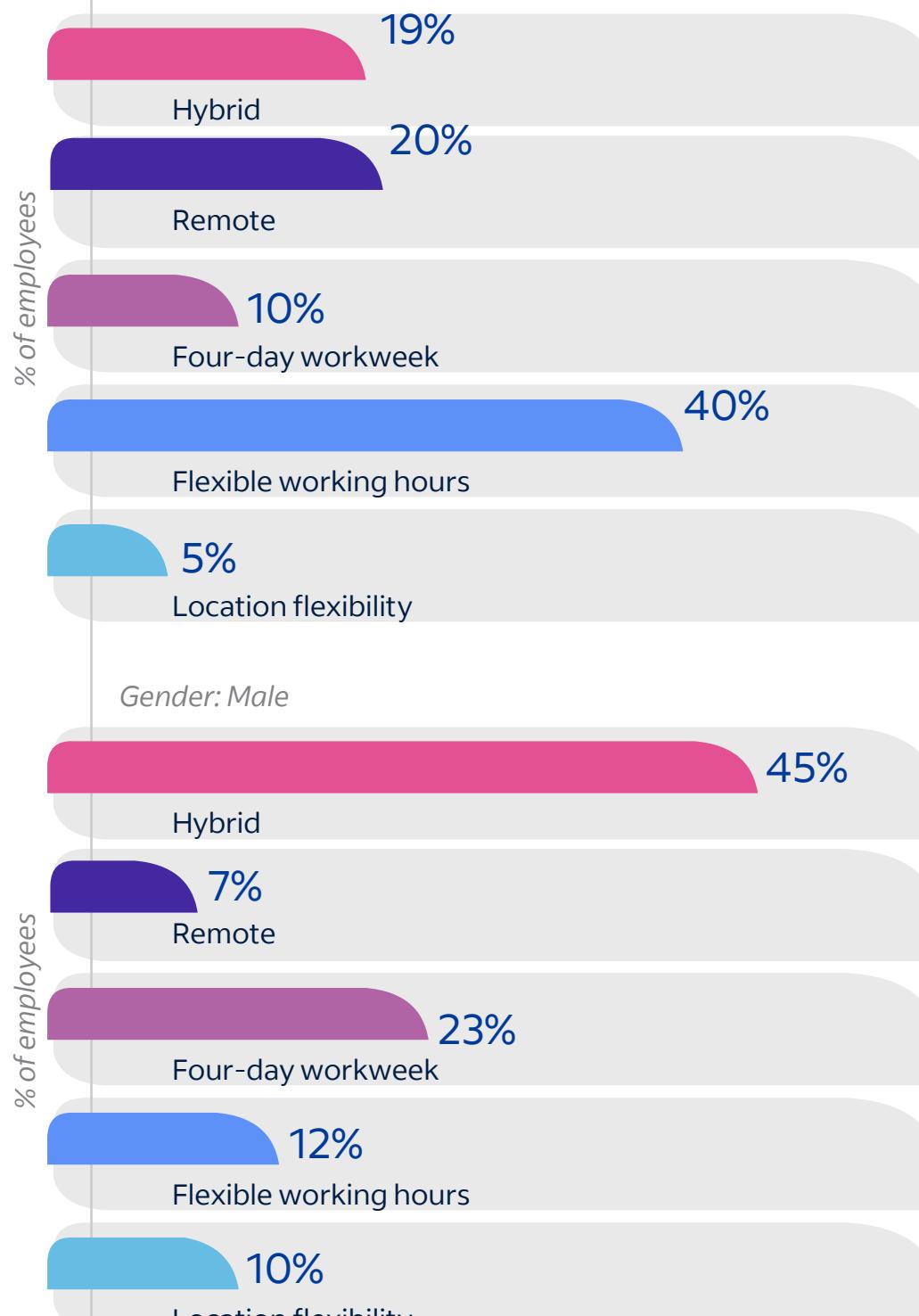
Age groups: 43-68 years



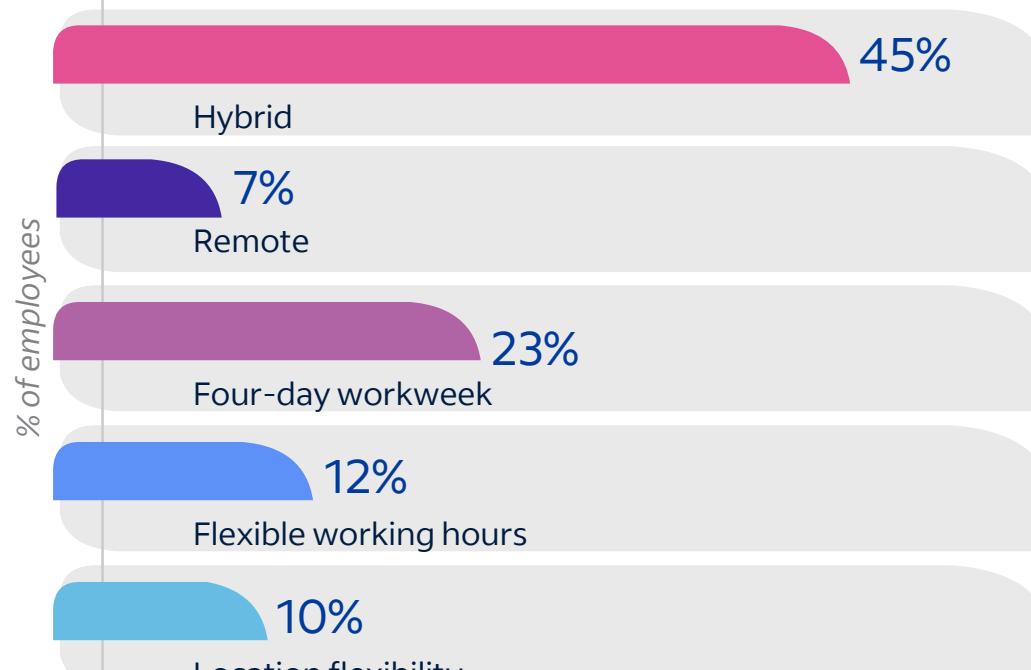
Within gender, more female employees prefer flexible working hours (40%) whereas male employees prefer hybrid arrangements (45%).

Gender

Gender: Female



Gender: Male

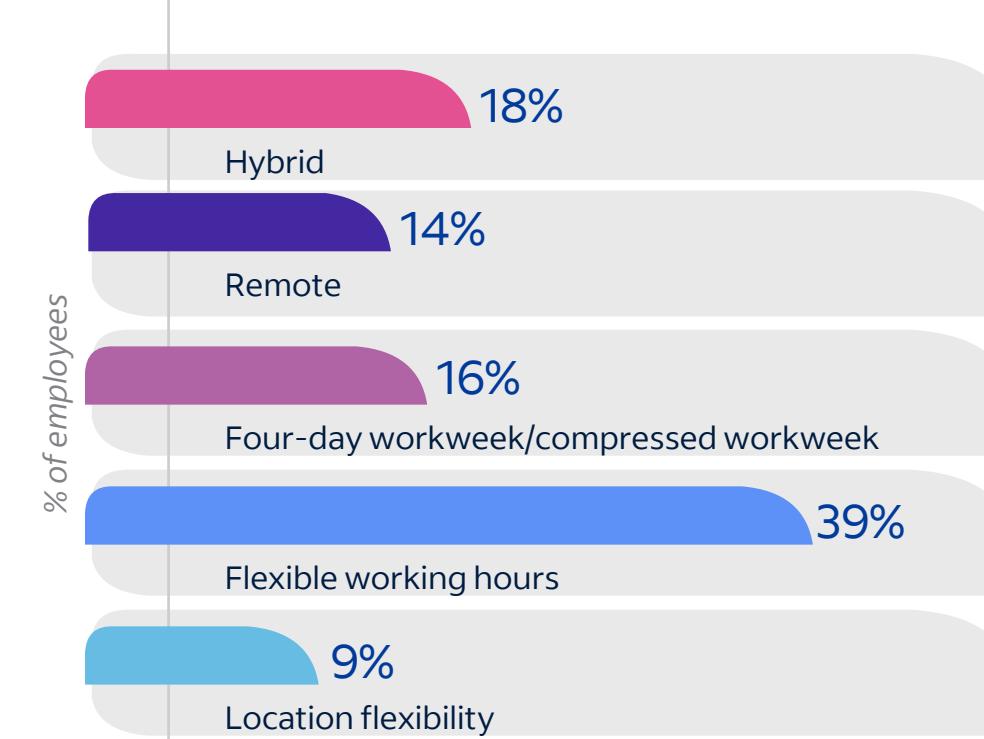


■ Hybrid ■ Remote ■ Four-day workweek ■ Location flexibility
■ None

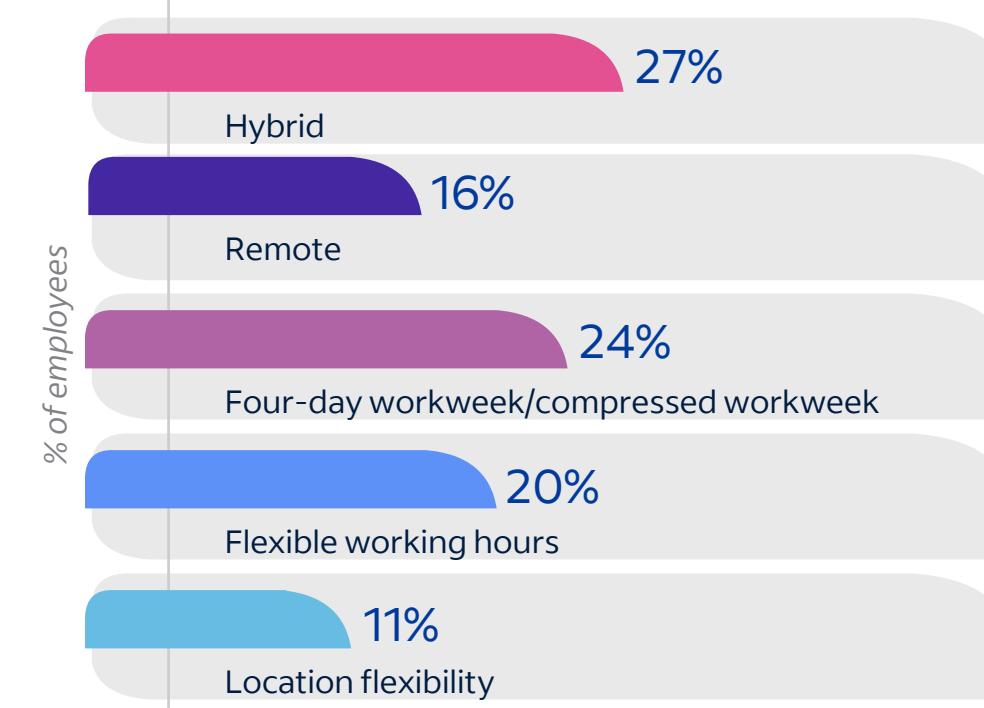
In comparison to other sectors, more employees in finance (51%) and professional services (44%) prefer hybrid work arrangements. When it comes to flexible working hours, greater preference for it is seen in built environment (39%) and technology (37%). Compared to other sectors, more employees in tourism (33%) prefer working remotely.

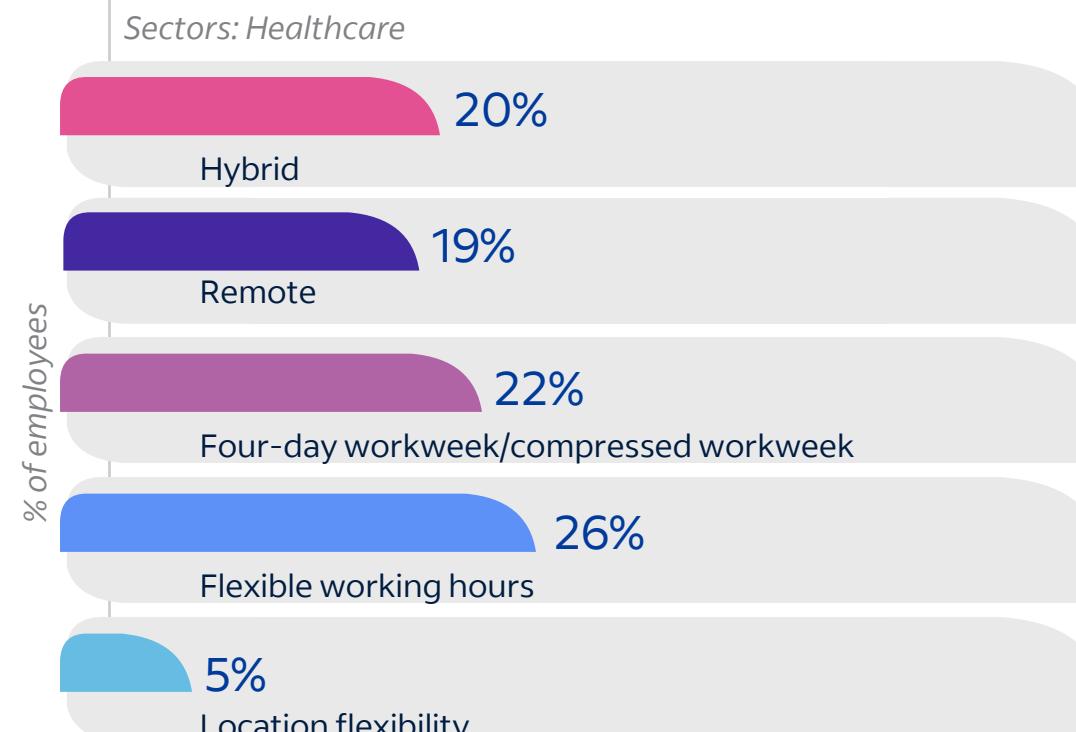
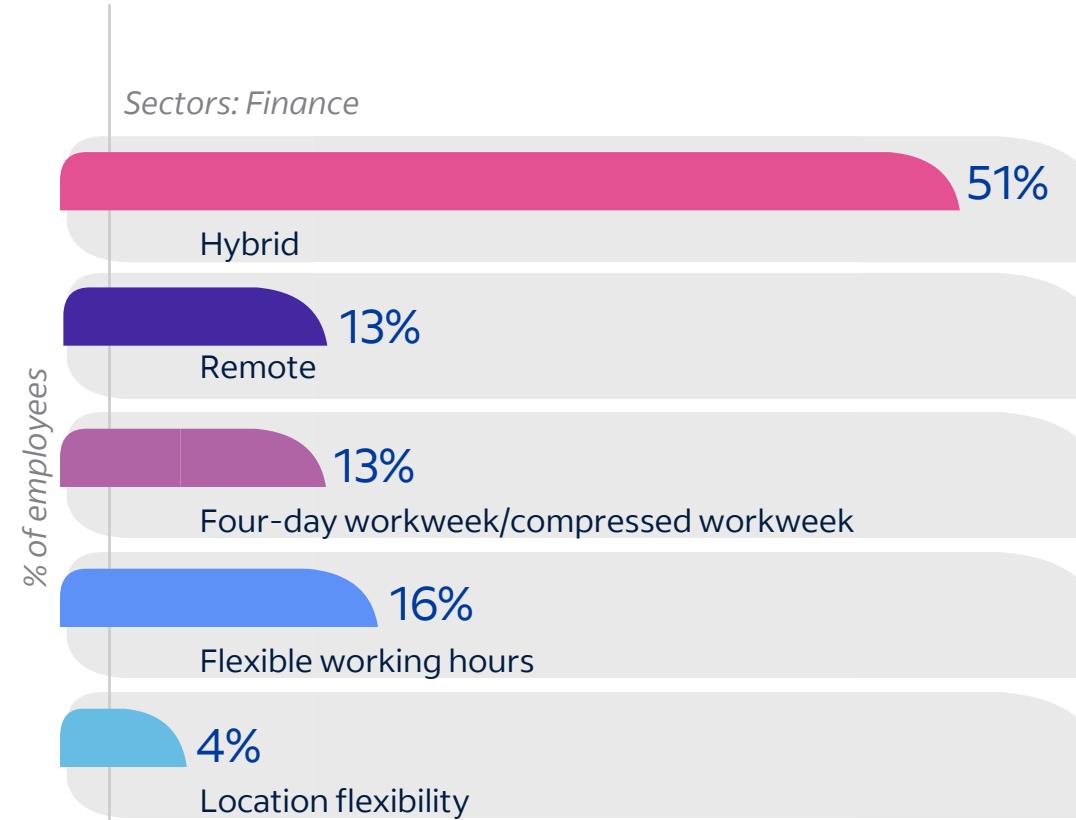
Flexibility arrangement preferences across sectors

Sectors: Built Environment

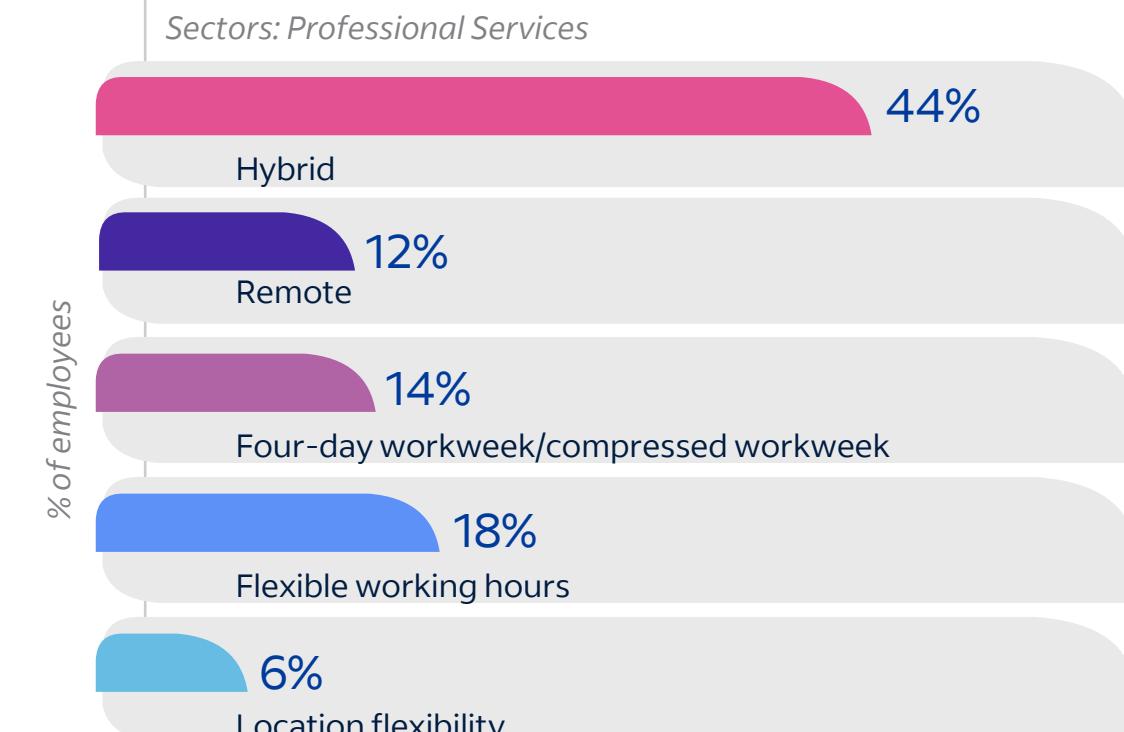
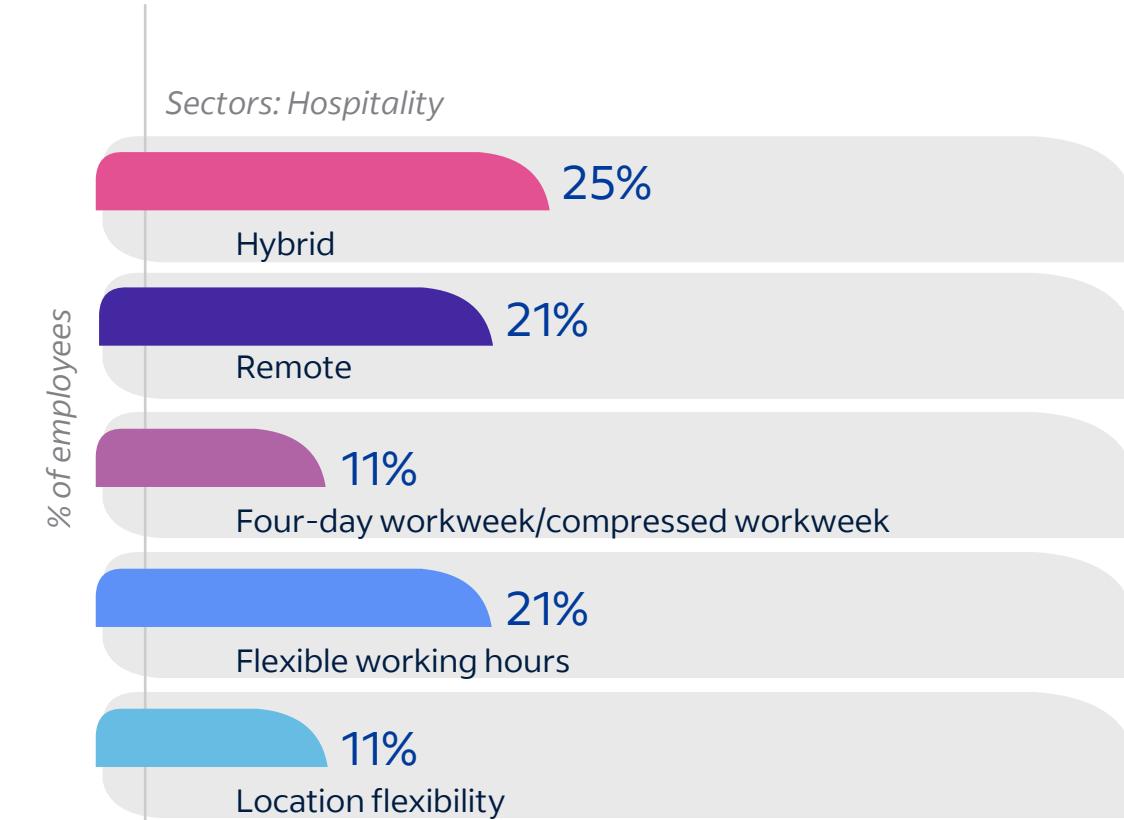


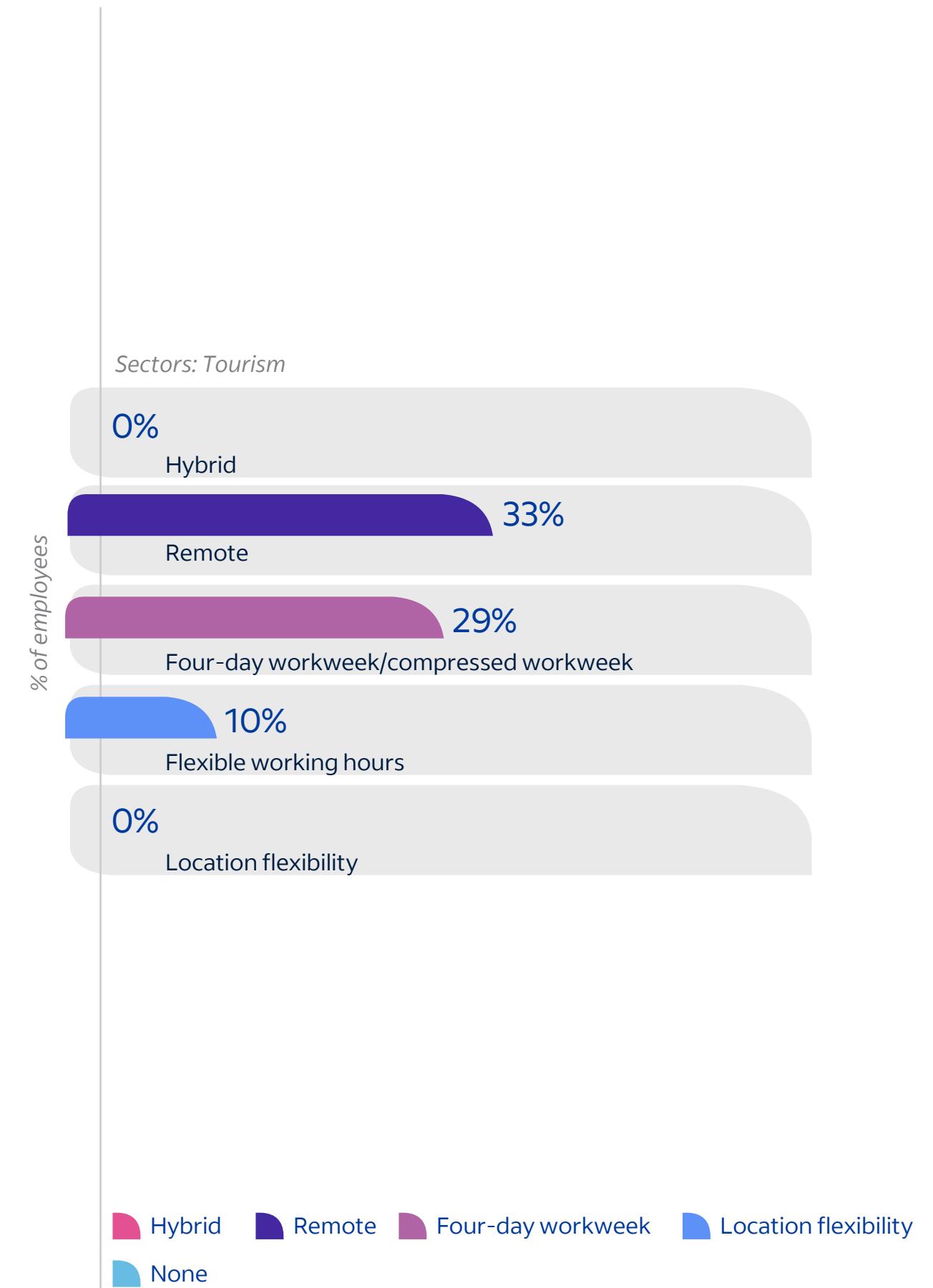
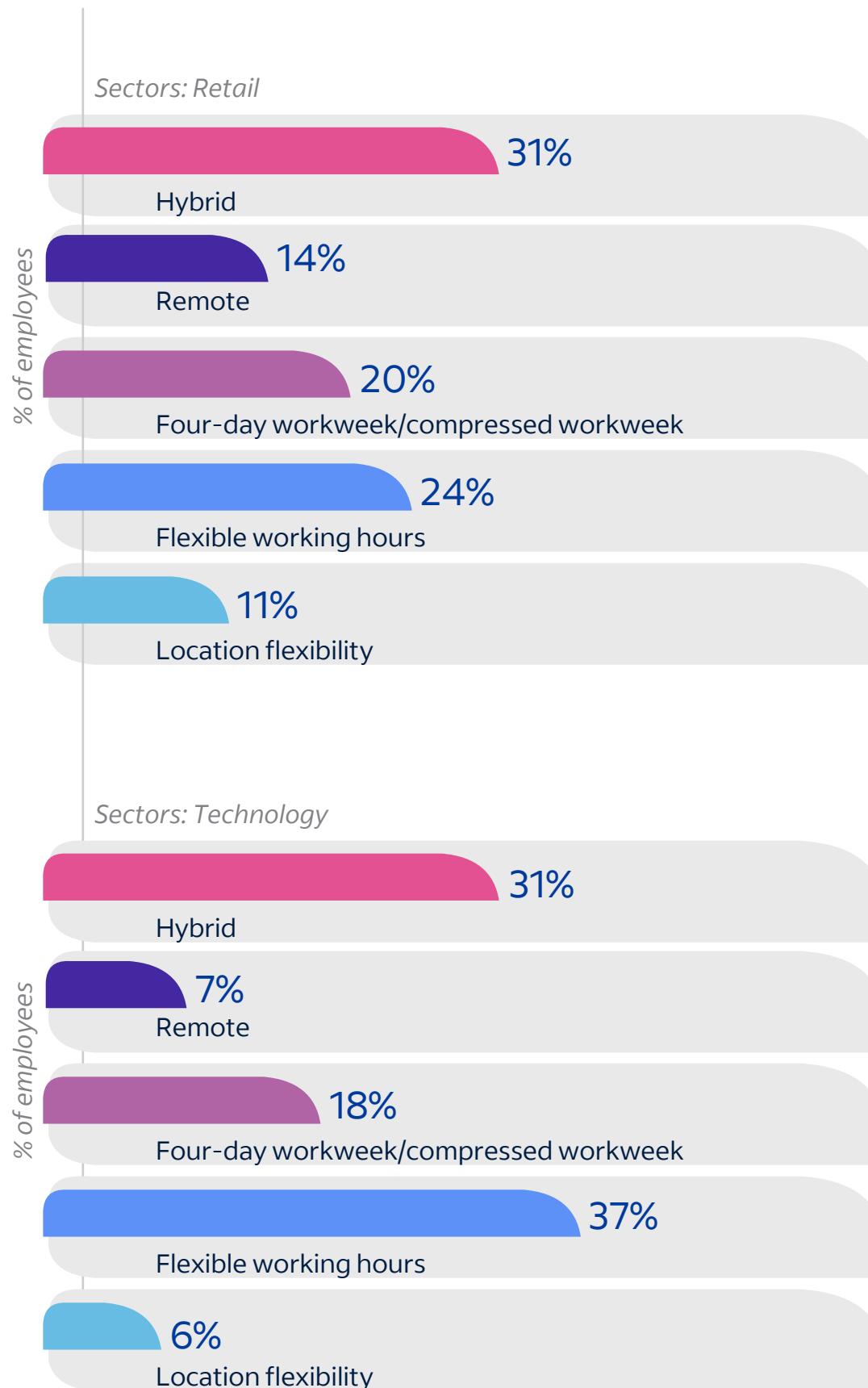
Sectors: Education





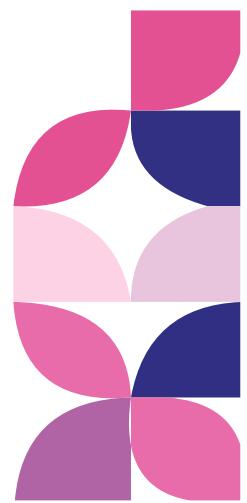
Hybrid
 Remote
 Four-day workweek
 Location flexibility
 None







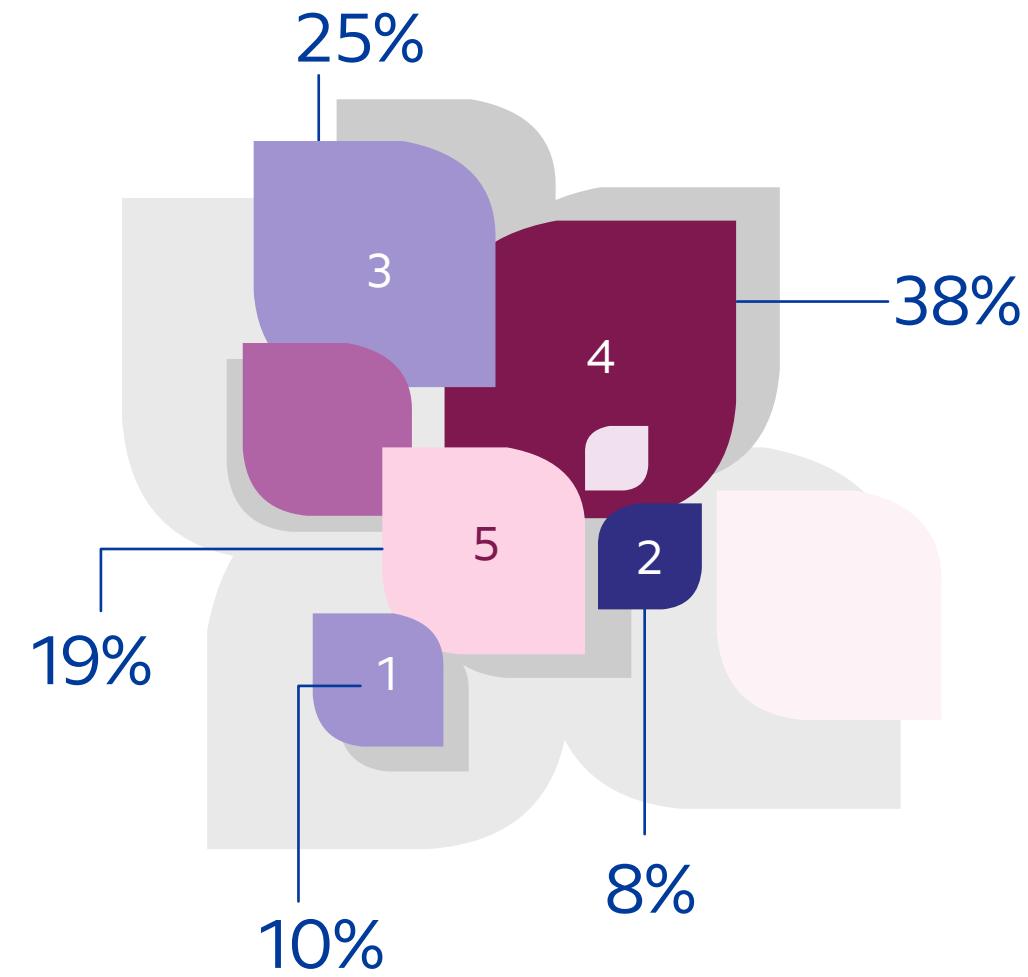
The flexibility factor: How supportive are organisations?



To a great degree, organisations are supportive of flexibility

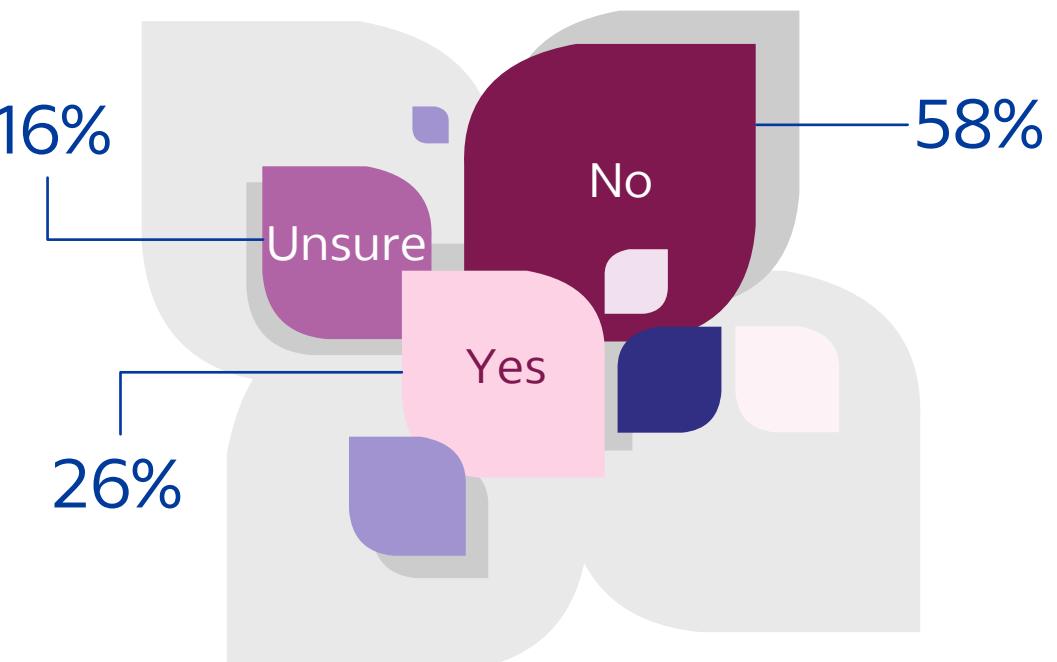
To understand what the future holds for flexible work arrangements, it is important to look at how employers feel about it today. Employees, for the most part, are being supported for utilising flexible arrangements. **19%** of employees claim that their organisations are extremely supportive of it and **38%** feel that they are mostly supportive.

How supportive are employers with flexibility?



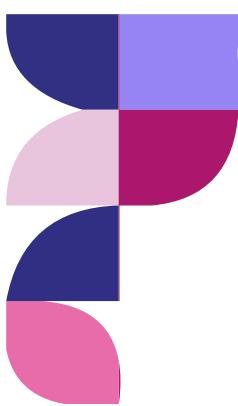
Have employees experienced pushback for using flexibility?

It is also crucial to remember that just having the provisions and policies for flexible work is not enough, employees should also be able to avail of it without the fear of judgement or being reprimanded for it. In response to that, **58%** of employees say that they haven't experienced any pushback for utilising flexible work arrangements at work, whereas a little over a quarter (**26%**) have. With this, we can conclude that although organisations are mostly supportive, there is still room for improvement.



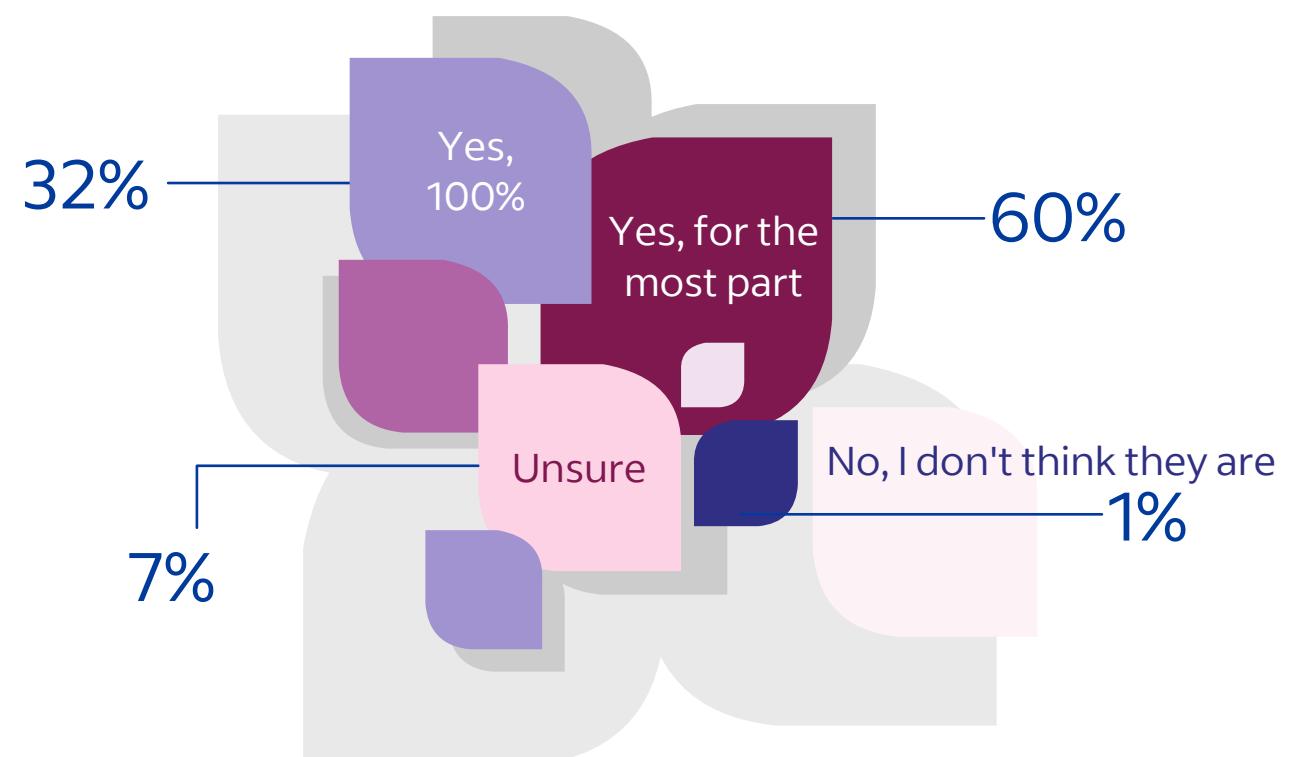
Why aren't organisations more flexible than they already are?

The idea of providing complete flexibility to employees is something that organisations are not sure of. So, what stops employers from bridging the gap when there is clearly room for improvement? A major concern that organisations have is regarding sustainability. While 62% of employers believe their business operations can be sustained through flexible arrangements, this perception is less aligned in small organisations (40%) compared to medium (68%) and large (65%). Meanwhile, over a quarter (26%) say that not all arrangements would be sustainable for them.

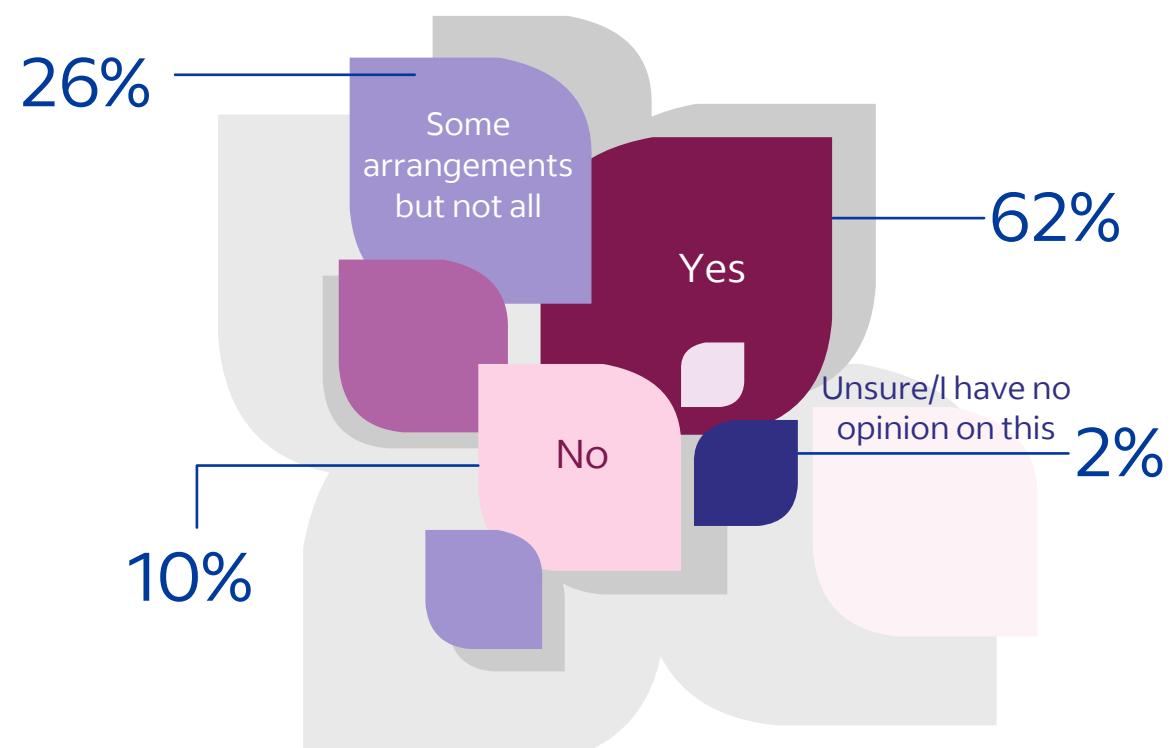


Adding on to the obvious business concerns employers have, trust also appears to be an issue for some. Although most employers trust their employees to finish their work with flexible arrangements, it appears that they are slightly hesitant. About one out of three employers completely trust their employees with it, and three out of five employers trust them for the most part, although not completely.

Do employers trust their employees to finish their work with flexible arrangements?

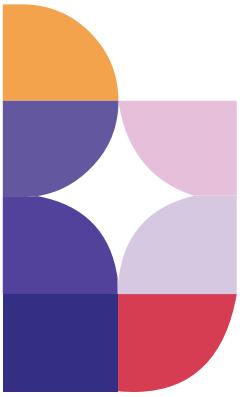


Are flexible arrangements sustainable for business operations?





A brave new world: Anticipating the future of flexible work arrangements



Is flexibility here to stay?

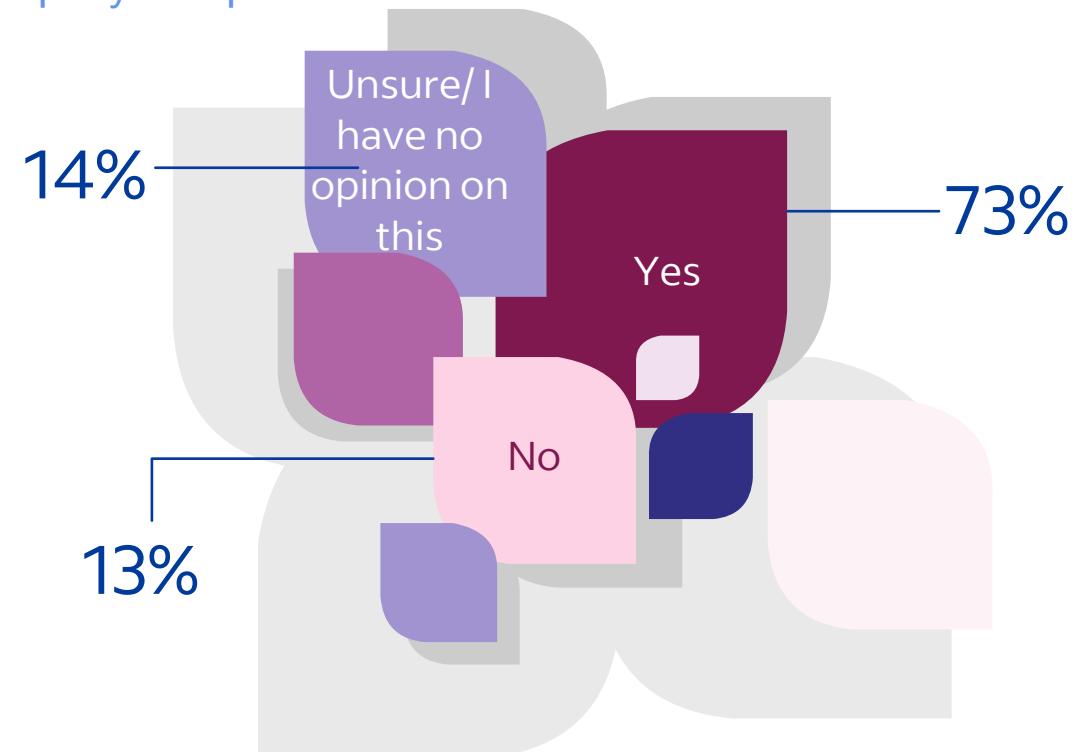
Keeping in mind preferences of flexibility among employees/jobseekers and the apparent need for organisations to consider them, flexible working arrangements are indeed here to stay. And, both employees and employers believe so.

73% of employees believe this, and this same opinion is supported by 84% of employers as well. An overwhelming proportion of middle-level employees (94%) believe the flexibility trend will continue for years to come. More than half of entry and senior-level employees (55%) believe the same as well.

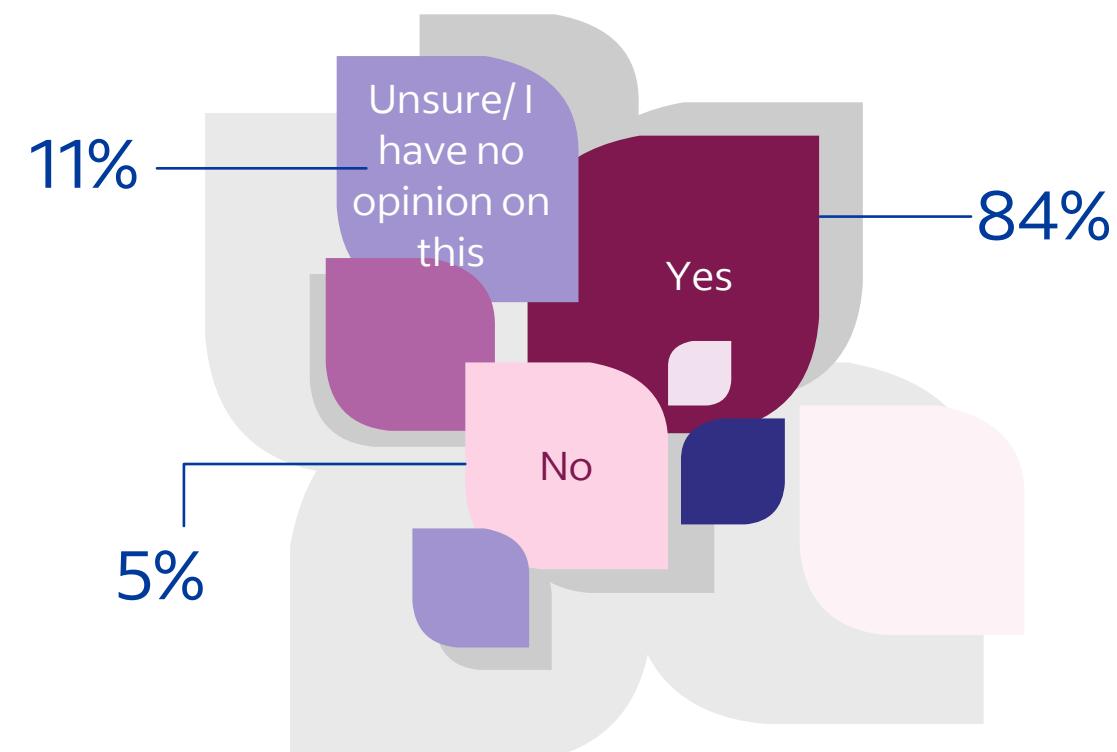
Hopefully, with mutual trust and respect, flexible working can help organisations to bloom while creating a safe space for the employees.

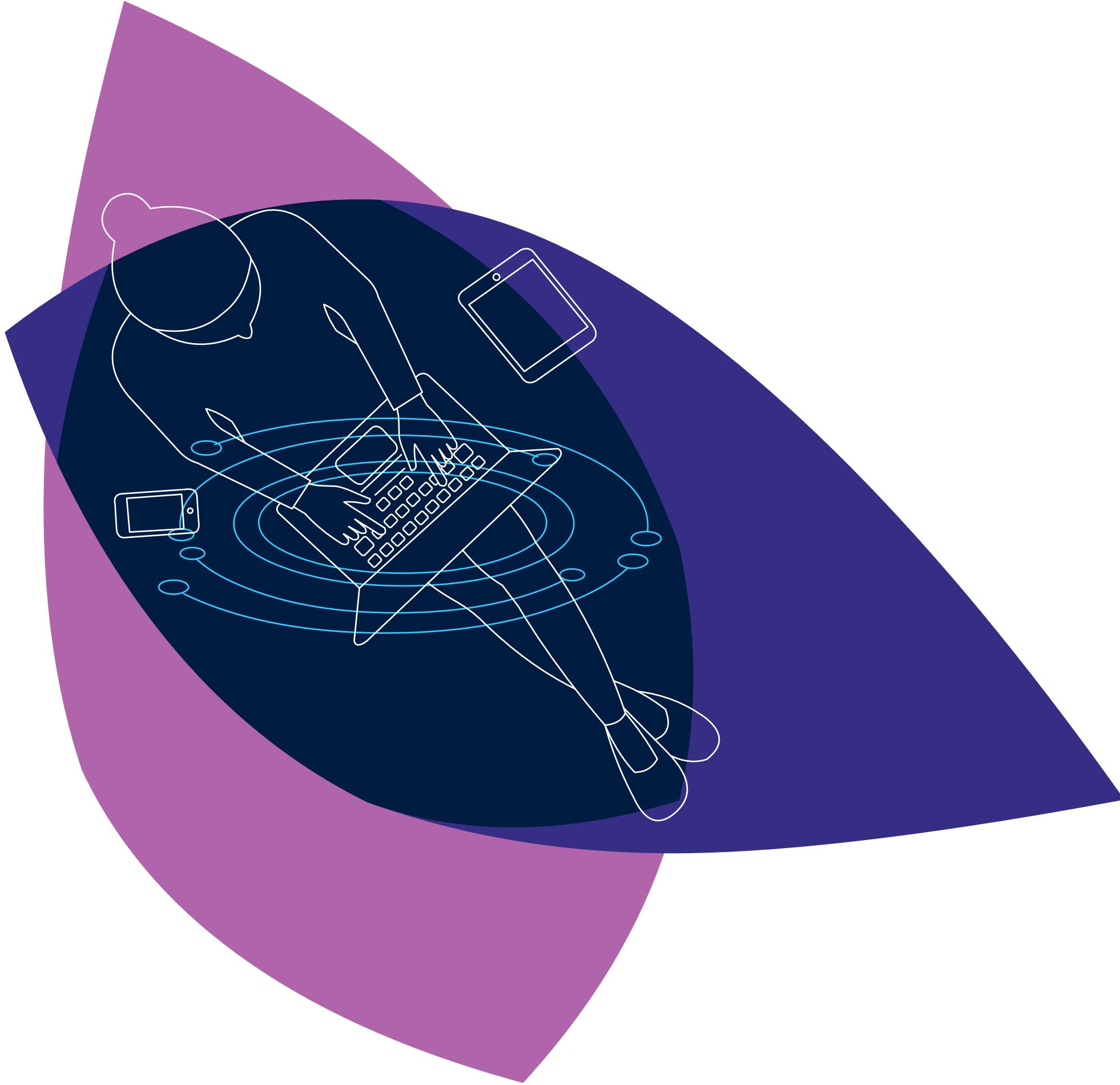
Will the flexibility trend be sustained for years to come?

Employee opinion

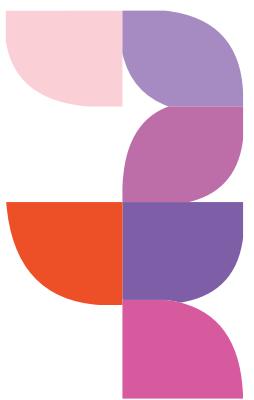


Employer opinion



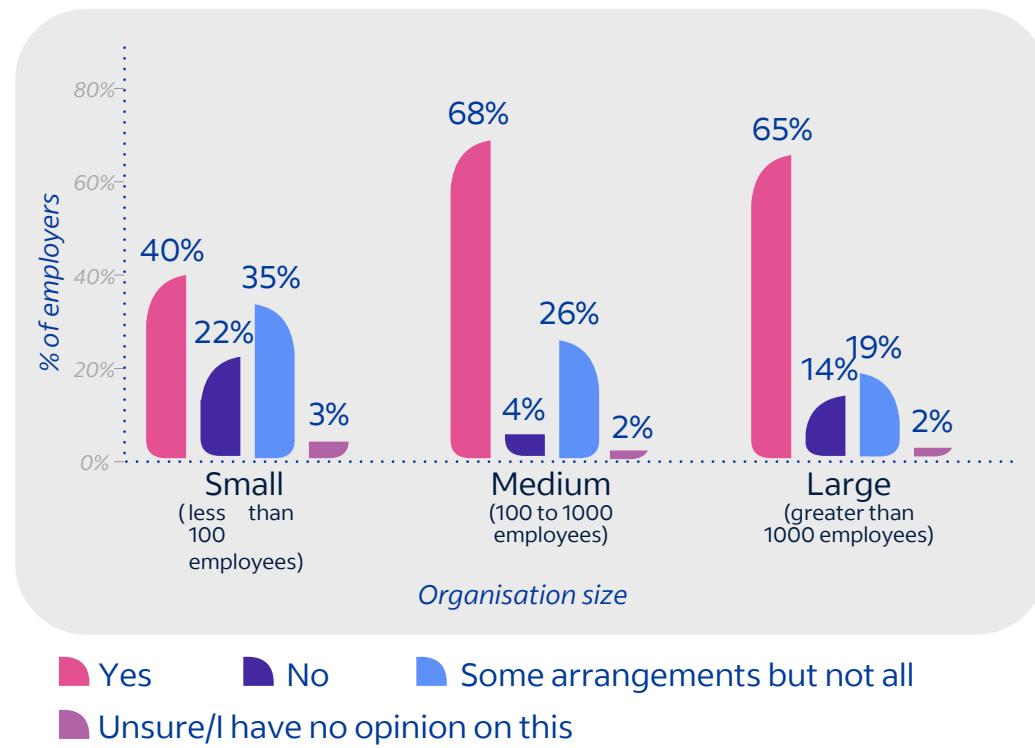


Annexure

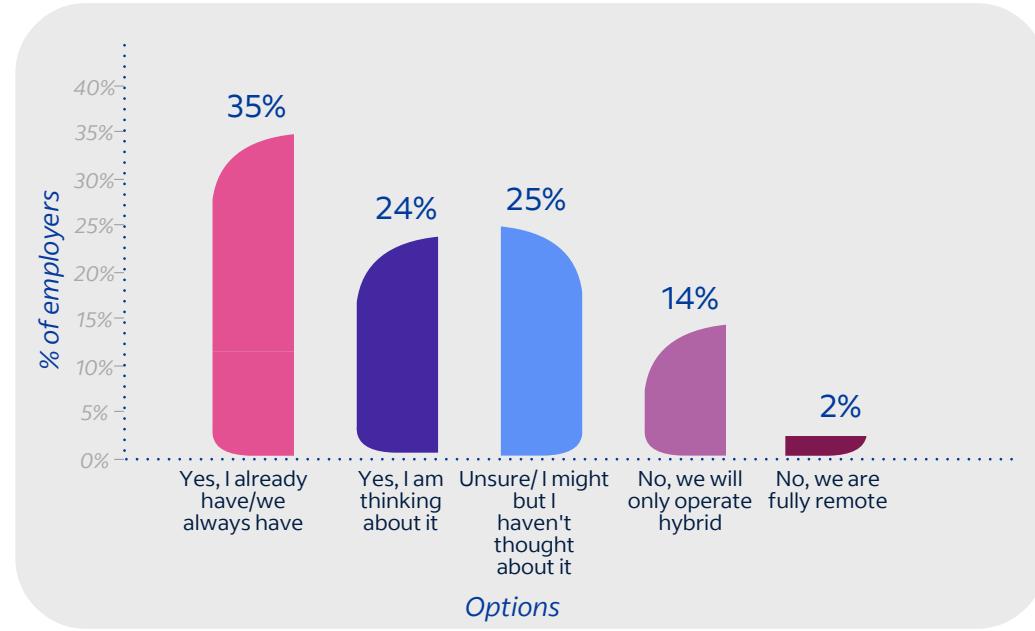


Additional Charts

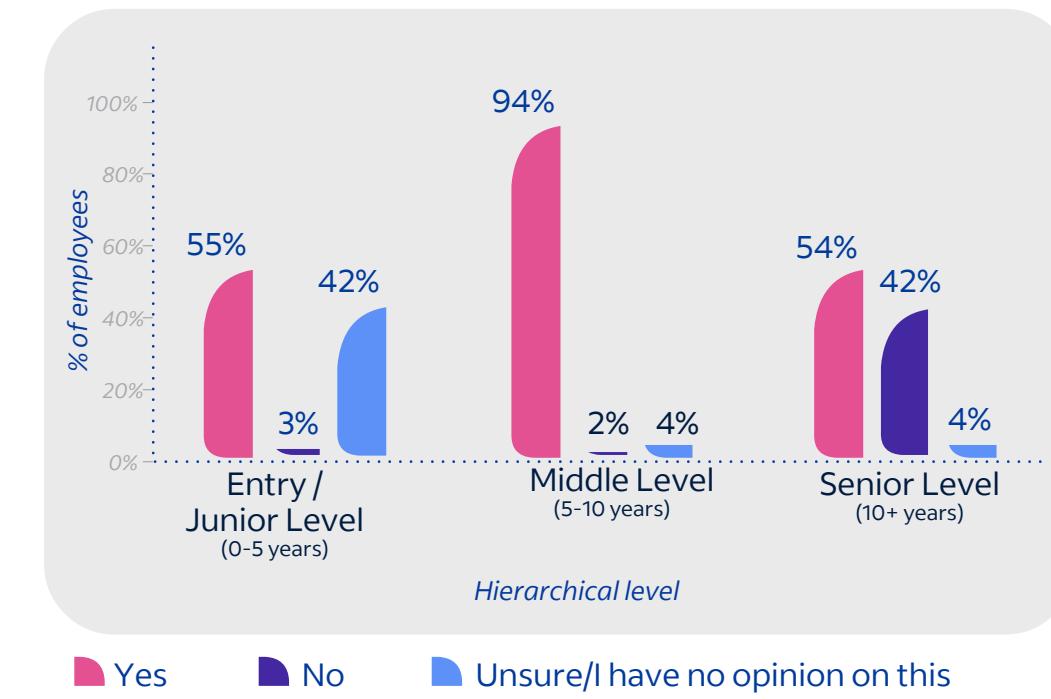
Is flexibility sustainable for businesses? : Organisation Size



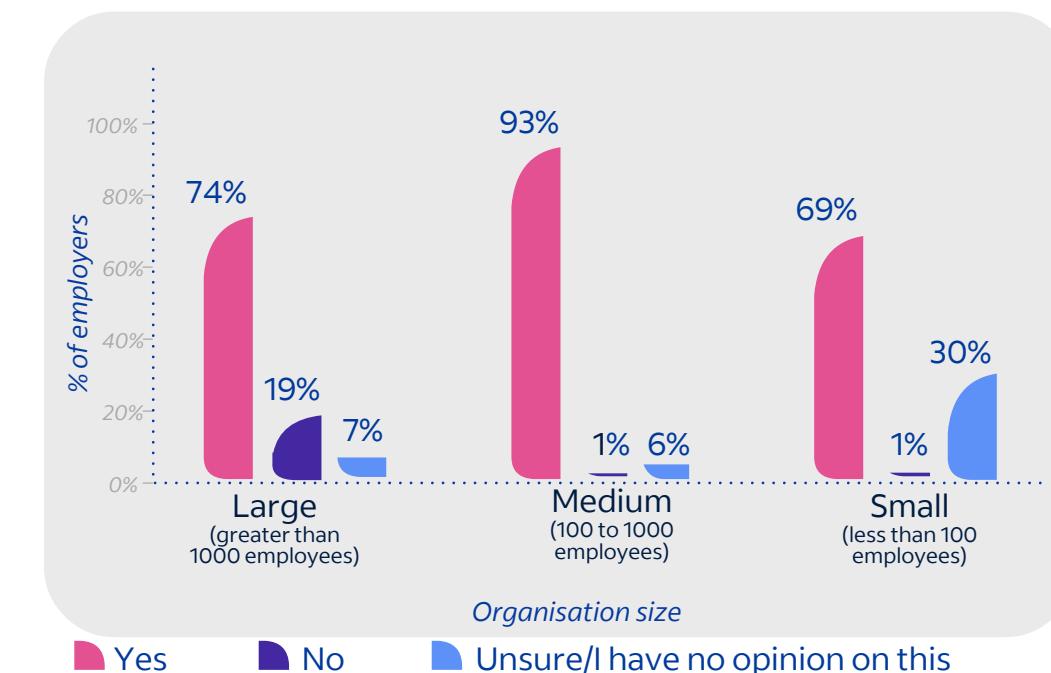
Will employers ask their employees to come back to office full time?



Employee perception of flexibility as a trend across hierarchies

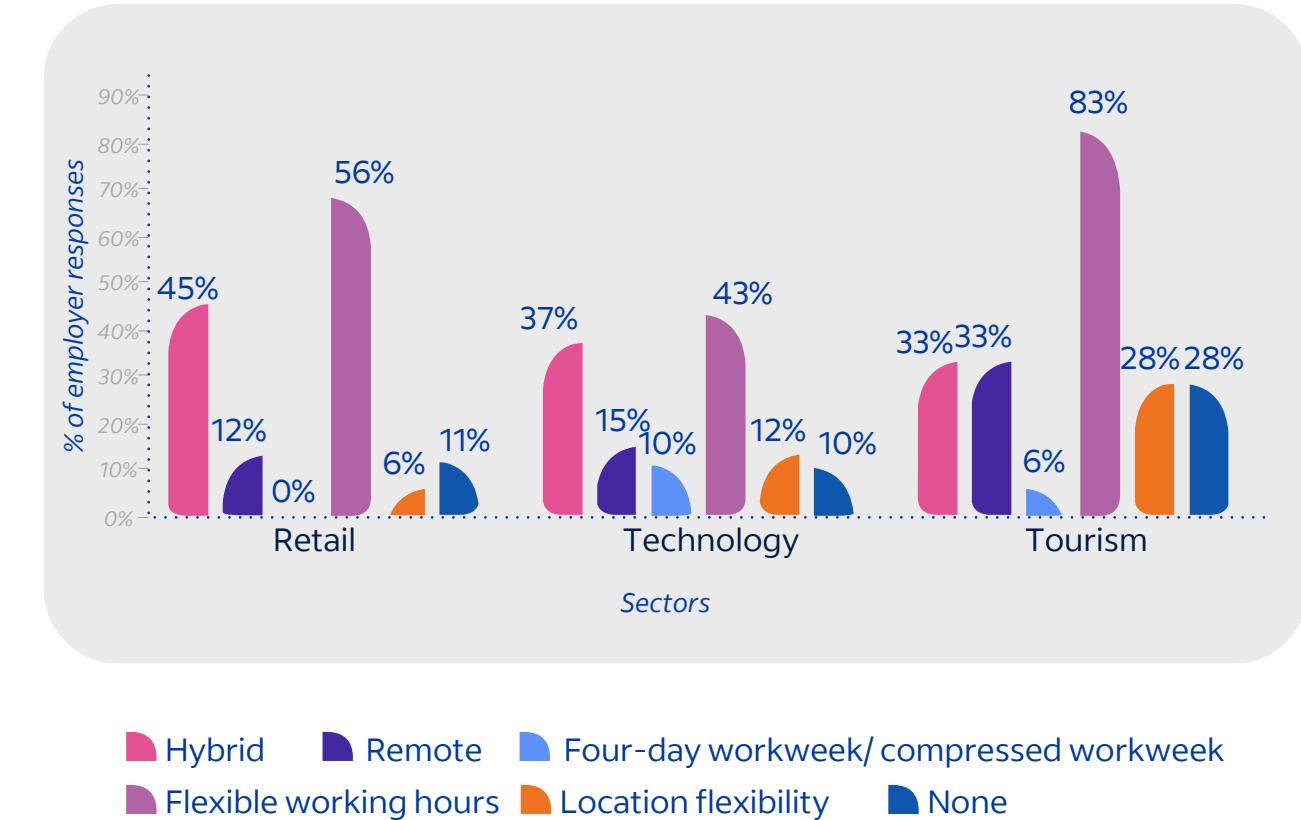
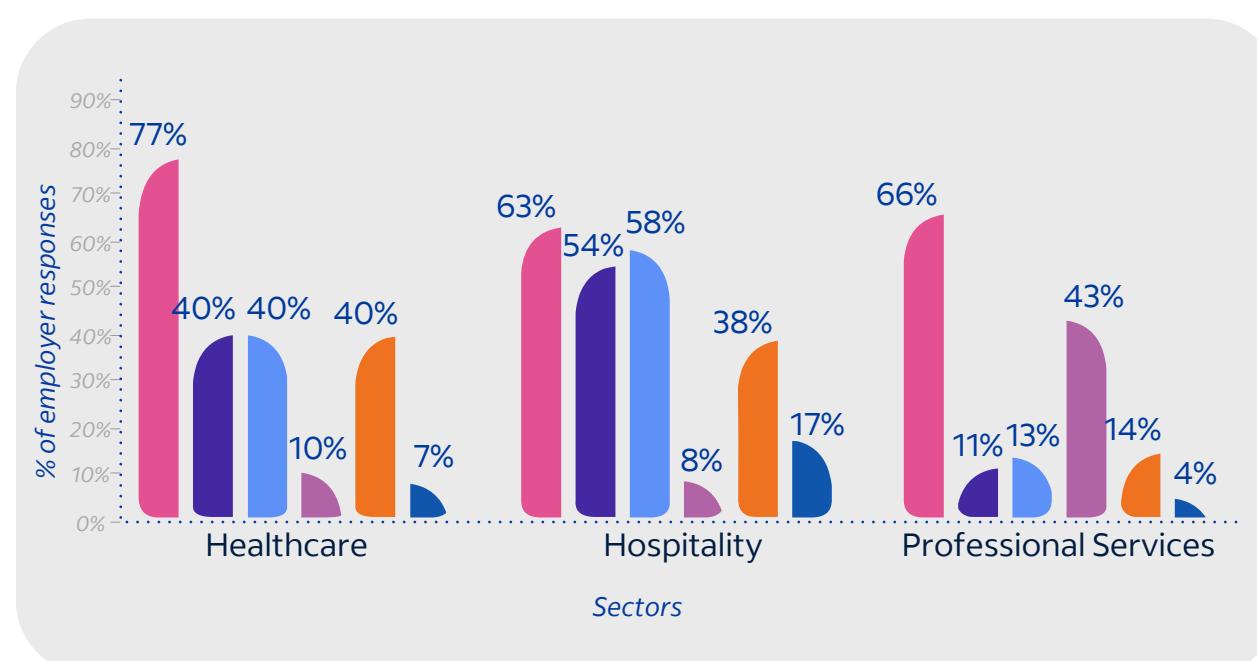
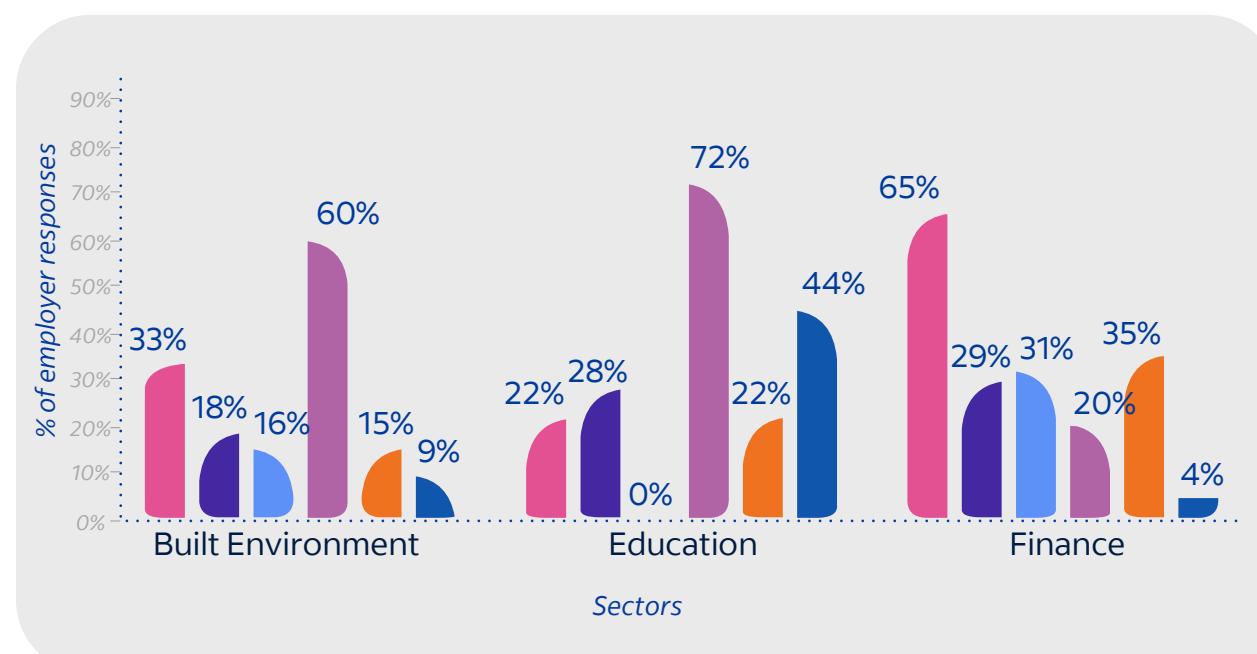


Employer perception of flexibility as a trend across organisation sizes



Additional Charts

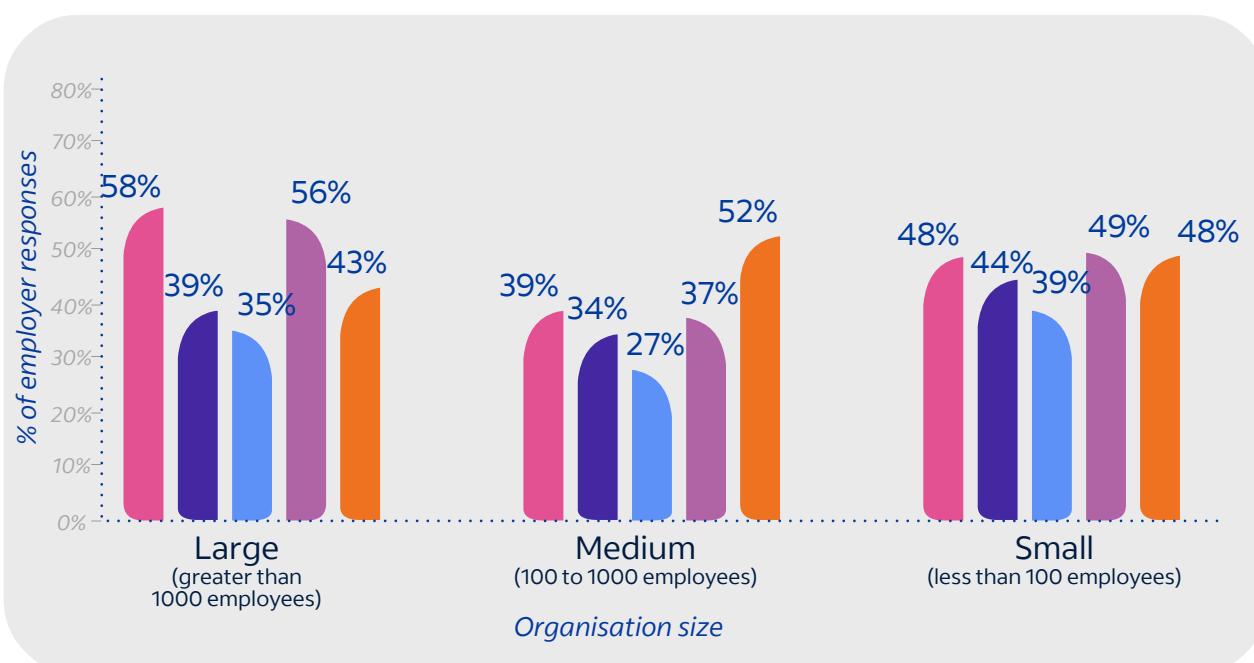
Sectors and the work modes they offer: Employer perspective



Note: The Built Environment (BE) comprises industries such as Construction, Facilities Management, Real Estate, Security, and Environmental Services (e.g. Cleaning, Waste & Pest Management).

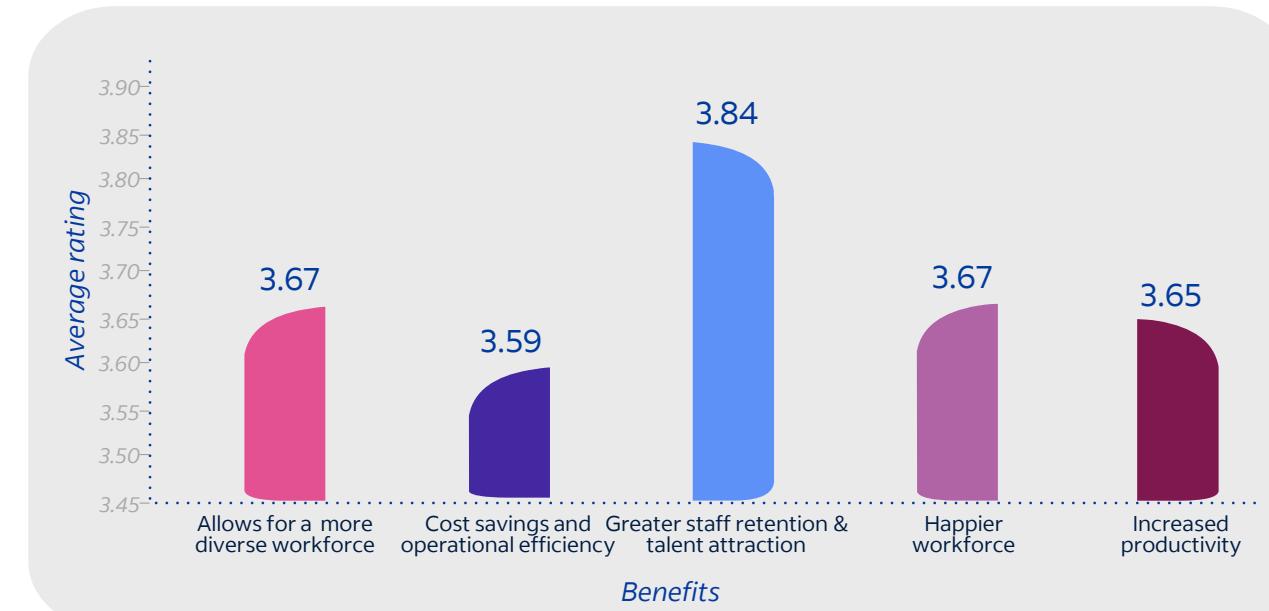
Additional Charts

Provision of flexibility to different groups in organisations

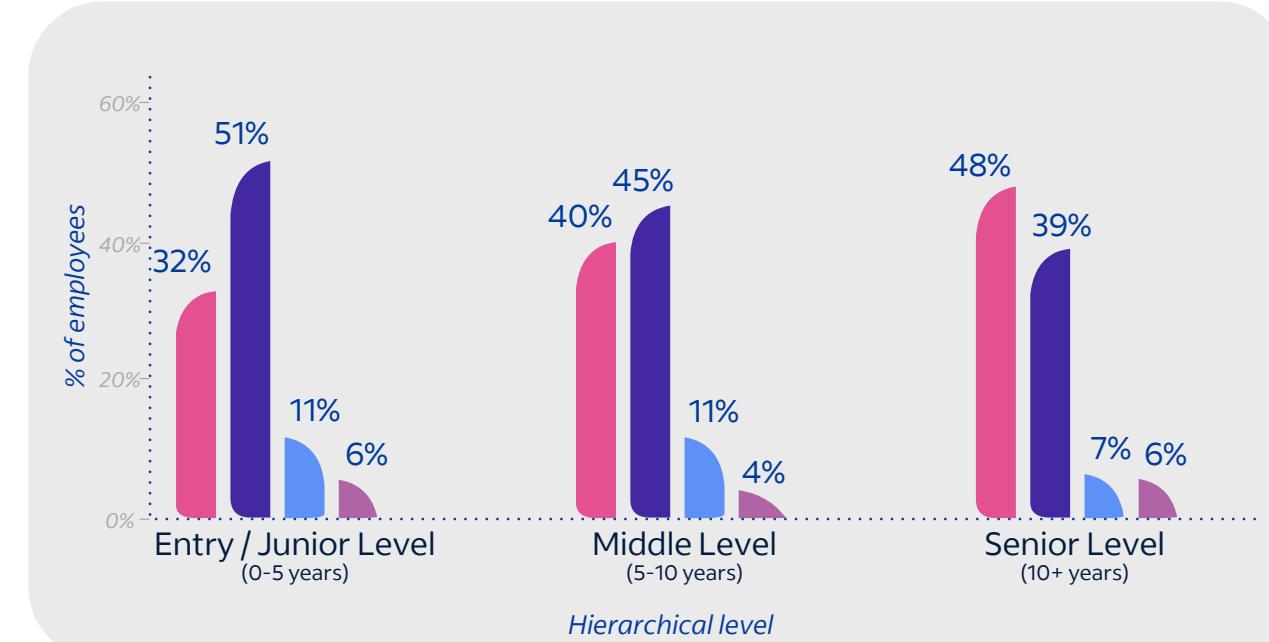


- Mothers ■ Fathers ■ Employees with disabilities/illnesses
- Employees who are the primary carer for another family member (e.g. someone caring for a family member with a disability or illness)
- Individuals seeking better work-life balance/increased productivity and focus

Correlation of workplace flexibility levels with the benefits it provides



How important is flexibility for employees across different hierarchies?



- Extremely important - the job must come with flexible working arrangements
- Somewhat important - I would prefer to have flexibility but it is not mandatory
- Neutral - I have no opinion on this
- Not important - I am not choosing a job based on flexible working arrangements

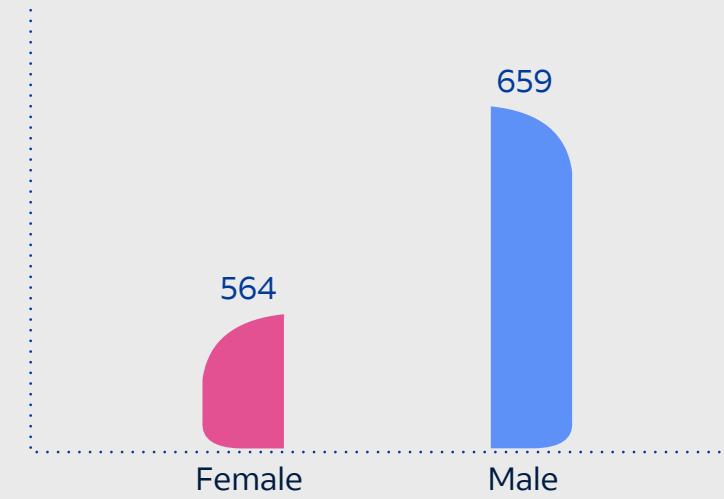
Methodology and sample design

Methodology

This survey was conducted by Valuvox on behalf of Indeed among **1223** employees and **607** employers in the month of June 2023

Sample Design: Employees

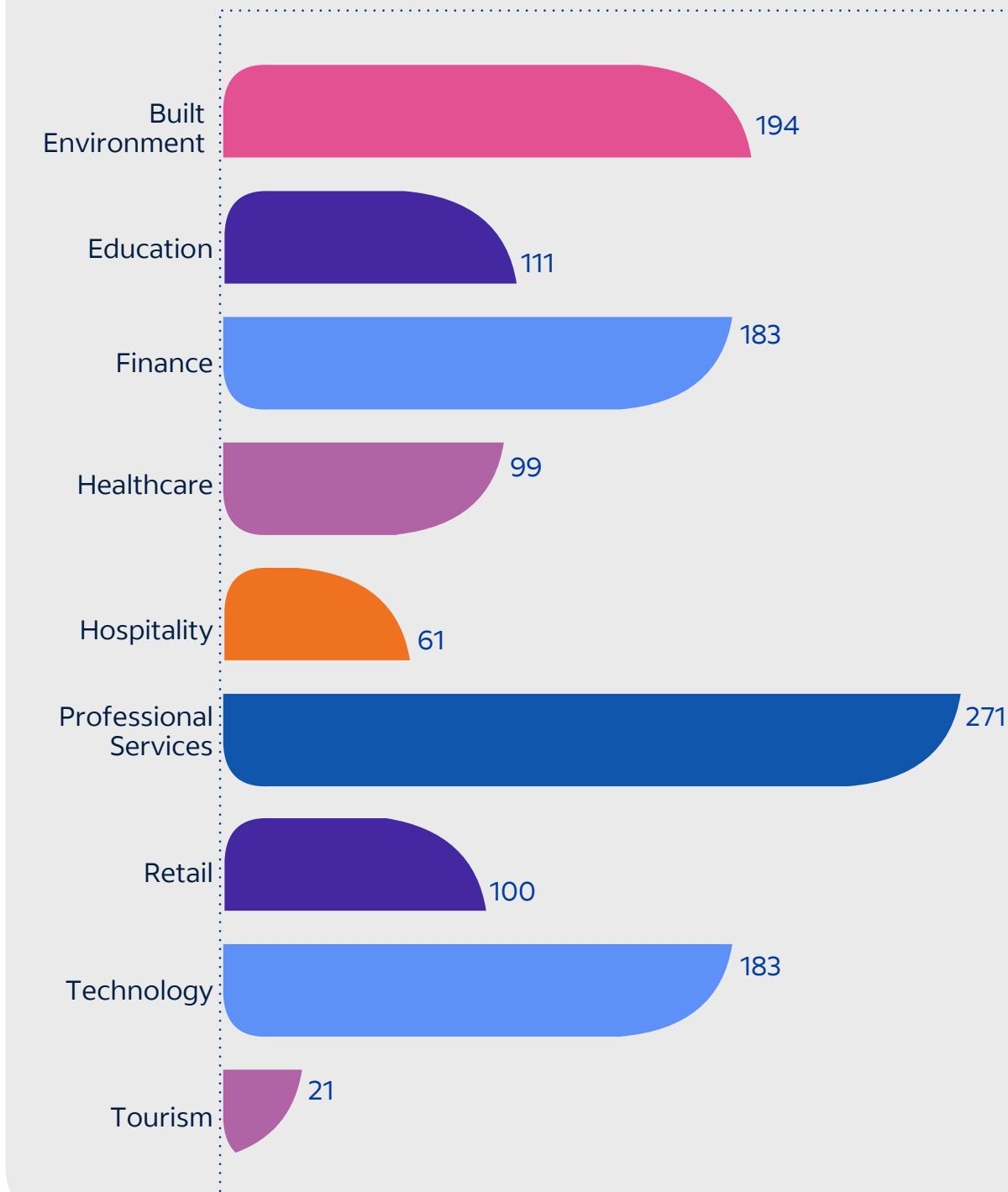
Gender



Age group



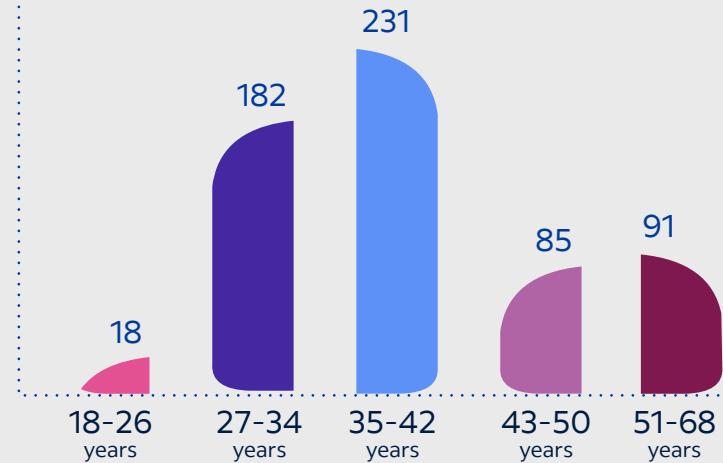
Sector



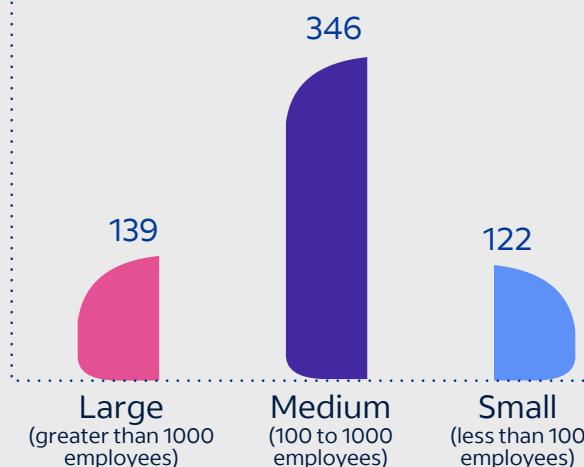
Note: The Built Environment (BE) comprises industries such as Construction, Facilities Management, Real Estate, Security, and Environmental Services (e.g. Cleaning, Waste & Pest Management).

Sample Design: Employers

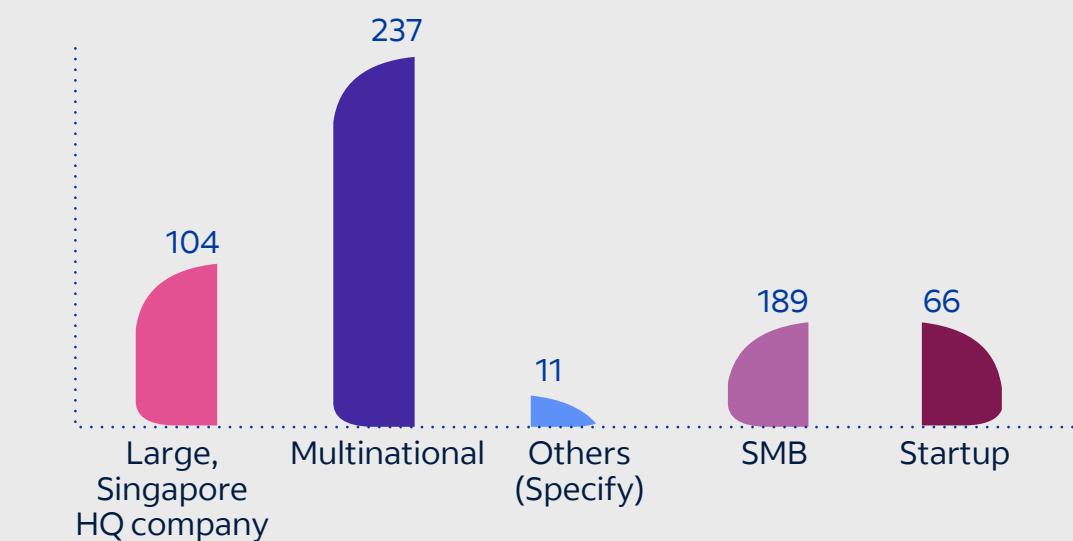
Age group



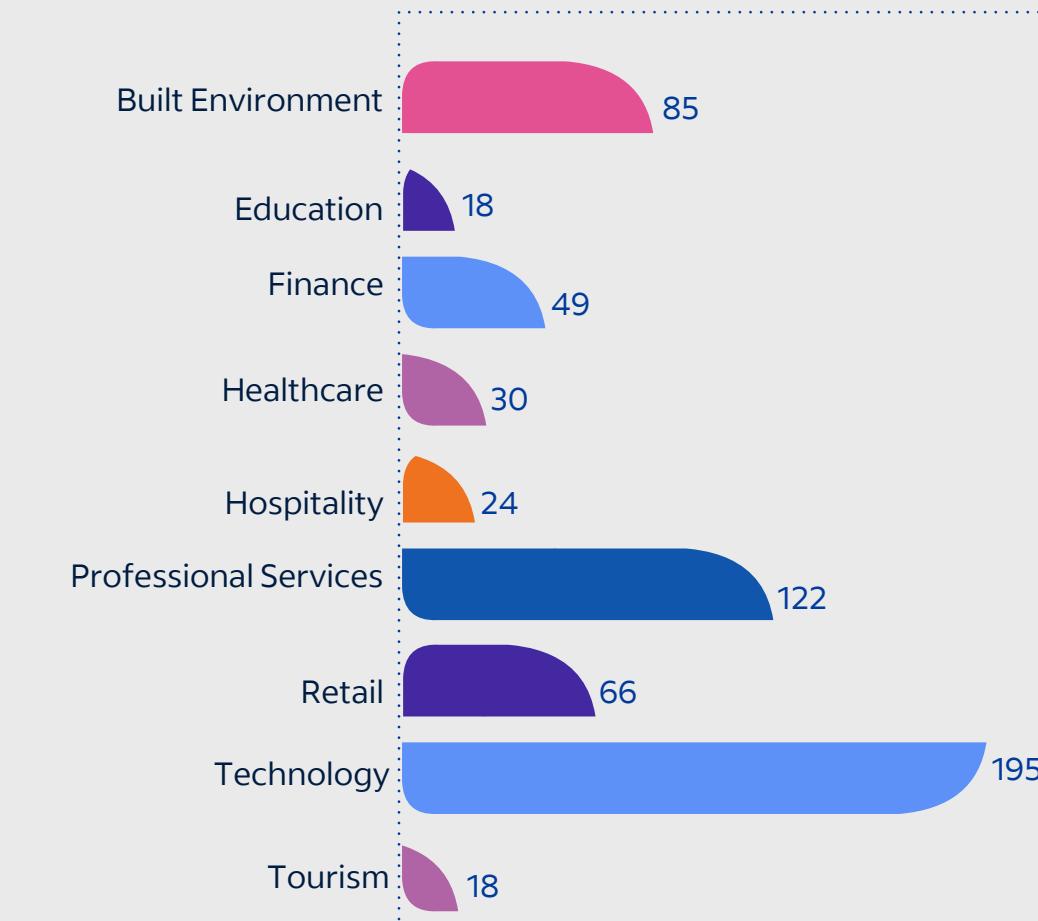
Organisation Size



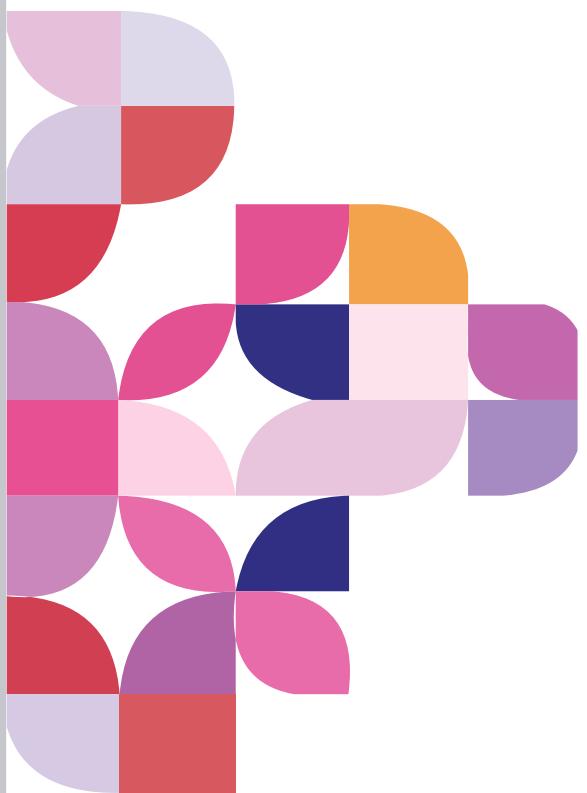
Organisation Type



Sector



Note: The Built Environment (BE) comprises industries such as Construction, Facilities Management, Real Estate, Security, and Environmental Services (e.g. Cleaning, Waste & Pest Management).



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