

EMPLOYMENT OPTIONS IN AUSTRALIA

RESEARCH REPORT MAY 2020

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ACKNOWLEDGEMENTS

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AHRI would like to thank Charles Cameron from the Recruitment, Consulting and Staffing Association of Australia & New Zealand for prompting this research project. AHRI would also like to thank its Advisory Research Panel members for their input into this survey, and the Fair Work Ombudsman for advice regarding question design.

FOREWORD



In releasing the findings in this report, I would like to thank the CEO of the Recruiting, Consulting and Staffing Association, Charles Cameron, who prompted the study by engaging with AHRI in a discussion on the issues arising from the Full Federal Court decision on casual workers coming out of the 2018 WorkPac vs Skene case.

The idea for a survey focused initially on the business ramifications of the meaning of the term ‘casual worker’ given that the court’s decision hung on signifiers of permanence and regularity. In the case before the court, the employee was a casual worker operating on a continuous roster arrangement set in advance annually by the employer.

The court decided that even though the word ‘casual’ was in Skene’s job title, his enterprise agreement made no such reference, and so he was effectively deemed an employee working permanently for one company and entitled to the benefits of an employee, such as annual leave and sick pay.

The survey that resulted in the findings of this report went beyond the category of casual employee to look at the employment options open to employers with respect to independent contractors and temporary on-hire labour workers, and to look at each through the lens of employer flexibility with respect to variable operational requirements, such as seasonal work and specific projects.

The survey also speculated on the likely hiring intentions of employers if, for example, they were obligated by law to convert temporary workers and contractors after six months of continuous work into permanent employees. In looking at the reasons why employers choose different employee options when hiring, such as increasing speed of recruiting, minimising overtime and ease of termination without the risk of unfair dismissal claims, the study looked at accommodating worker preferences to the extent they affected employer imperatives.

The study did not apply an employee lens to issues such as fair pay and conditions, or worker engagement and commitment to the vision and mission of the organisation. These are priority issues for HR practitioners wanting to maximise employee engagement in order to boost productivity, customer satisfaction and business sustainability. They are also critical issues for employers who need assurances that they are operating ethically and within the law.

In addition, the study did not seek to explore the implications of employer hiring options within a commercial setting that requires employee evidence of permanent regular employment in order to qualify for loans to purchase goods such as a car, or to apply for a mortgage to purchase a house. Were a gig economy to grow substantially, questions such as these will need to be subject to debate and policy decision making. They are also big issues with economic and societal ramifications that need to be the subject of future research.

Although this study was undertaken prior to the onset of COVID-19, the findings are being released at a time when nervous employers may be looking for ways to recover from government-directed business lockdowns and return to trading but without all the staff that were stood down during the lockdown. It is likely to be a time when employers have increased power in the marketplace and some may choose to employ people through on-hire arrangements, contracts or as casuals rather than as ongoing permanent employees, should they see an advantage in doing so.

I commend the report for what it may add to policy debate on issues such as employers wanting to grow their business and remain sustainable as going concerns that employ people and generate economic growth.

Sarah McCann-Bartlett
Chief Executive Officer
Australian HR Institute

EXECUTIVE SUMMARY

Background

Business conditions in Australia are subject to increasingly rapid and regular change, driven by global volatility, more dynamic market conditions, populist governments and digitally enabled competition. Against this background, the Australian HR Institute has conducted a survey to investigate the workforce needs of modern business in this dynamic market. These findings touch on the pressures that inform recruitment of workers by different categories, as well as the perception of employers if legislation were to close off options.

This study limits its focus to an exploration of options available to employers when considering the conditions under which they can lawfully engage people to perform work. Informed by the preferences and practices of the organisations they serve, respondents to the survey which inform this report focus on employer reasons for engaging different types of workers. The reasons include adapting to operational requirements affected by variables such as short-term projects and seasons, as well as increasing speed of the recruitment process, minimising cost of leave, and terminating with minimal notice. While reasons also include accommodating employee preferences when engaging casual workers and independent contractors, employee considerations are not central to the focus of this study.

Respondents were given the following descriptions for employee options, that are referred to throughout this report:

- Casual employees employed in organisations
- Independent contractors that organisations engage
- Temporary workers on-hire via a third-party workforce service provider

Reasons for engaging different employee categories

A major reason for conducting this survey was to look at the reasons for different categories of workers, and how these differ. The survey found that more than half of the sample connected the hiring of workers in different categories to business conditions and operational requirements. Another reason for employing different worker types, was reducing costs related to the entitlements associated with permanent employees, such as leave entitlements, overtime costs and protection from unfair dismissal claims. An additional reason was employer flexibility, such as avoiding obligations regarding award entitlements and termination restrictions.

The top 5 reasons referred to in Table 1, varied by demographic differences (sector, role, and organisation size; set out in Detailed Findings and Appendices 1-3).

TABLE 1. TOP 5 REASONS FOR ENGAGING THE FOLLOWING TYPES OF WORKERS:

REASON RANKING	CASUAL EMPLOYEES	INDEPENDENT CONTRACTORS	TEMPORARY WORKERS
1	Adapting the workforce to flexible business conditions and operational requirements	Meeting specific project requirements	Adapting the workforce to flexible business conditions and operational requirements
2	Meeting seasonal business requirements	Adapting the workforce to flexible business conditions and operational requirements	Meeting specific project requirements
3	Meeting specific project requirements	Meeting seasonal business requirements	Meeting seasonal business requirements
4	Accommodating the preferences of workers	Accommodating the preferences of workers	Increasing speed of the recruitment process
5	Assessing workers prior to offering permanent employment	Increasing speed of the recruitment process	Outsourcing employment and workforce management

EXECUTIVE SUMMARY

Worker capacity to affect organisational growth

Another reason for conducting this survey was to understand how these different worker options affect organisational growth. Respondents reported that hiring casual workers was more likely to increase capacity to grow business than independent contractors or temporary workers. Across the worker categories, there was a general trend of respondents in the private sector being more likely to see these workers increasing the capacity to grow business. With respect to job roles, employees in c-suite roles were more optimistic than those in other roles in their belief that the use of the three worker categories increase the capacity to grow business.

Legislation closing off options

The survey also looked at employer perceptions if specific legislative requirements were implemented. Hypothetical legislative situations were put to respondents.

If these worker categories were no longer an option, respondents report that their organisations would be more likely to replace hours worked by casual workers with permanent employees, than they would to replace hours worked by independent or temporary workers with permanent employees.

Also, it was found that respondents indicated an unreadiness to hire casual employees if they must become permanent employees after six months. Further, it was noted that only around one in three respondents indicated that their organisations would be likely to engage temporary workers, if the law required temporary workers to be employed under the same terms and conditions as permanent employees.

DEMOGRAPHICS

This survey was distributed to the member database of the Australian HR Institute (AHRI) during June and July 2019. It attracted a total of 414 responses. Respondents were treated anonymously.

The majority of respondents live in a metropolitan area (75.4%) and reside in Victoria (27.8%), NSW (24.9%) or QLD (20.1%) as shown in Figure 1 and Table 2.

FIGURE 1: LOCATION (414 RESPONSES)

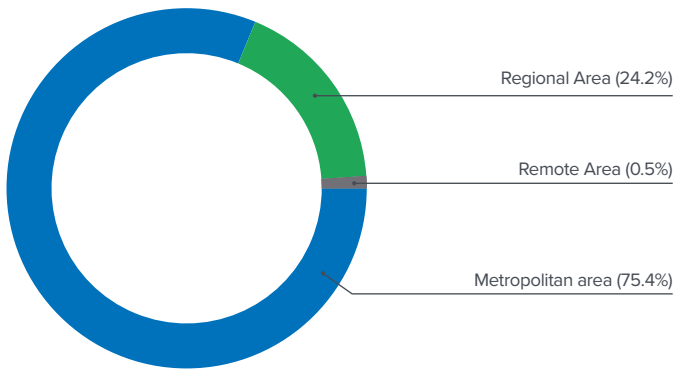


FIGURE 2: SIZE OF ORGANISATION (414 RESPONSES)

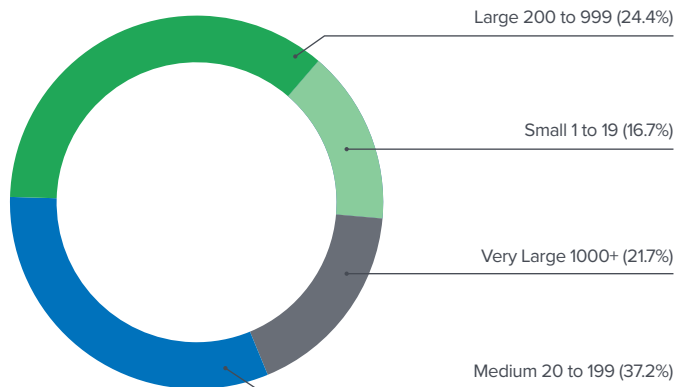


TABLE 2: STATE (414 RESPONSES)

Answer	Percent
VIC	27.8%
NSW	24.9%
QLD	20.1%
WA	12.3%
SA	8.2%
ACT	3.6%
NT	1.7%
TAS	1.5%

A large proportion of respondents identified themselves as HR managers (30.2%) and worked in a very large organisation (1000+ workers), as shown in Figure 2 and Table 3.

Overall, 75.9% identified themselves as being in an HR role, 10.1% in a c-suite/executive role (board director, CEO or senior executive team), and 14% in other roles (academic, consultant, contract/freelance, line manager or other).

TABLE 3: JOB ROLE (414 RESPONSES)

Answer	Percent
HR Manager	30.2%
HR Adviser	12.1%
HR Consultant	8.7%
HR Business Partner	6.8%
Senior Executive team	6.8%
HR Administrator	6.5%
HR Director (national focus)	6.0%
Consultant	5.6%
HR Director (state focus)	3.9%
CEO	2.4%
Academic	2.4%
HR Director (global focus)	1.7%
Contract/freelance	1.7%
Board Director	1.0%
Line Manager	0.7%
Other	3.6%

A majority of respondents work in the private sector (56.5%), as shown in Figure 3.

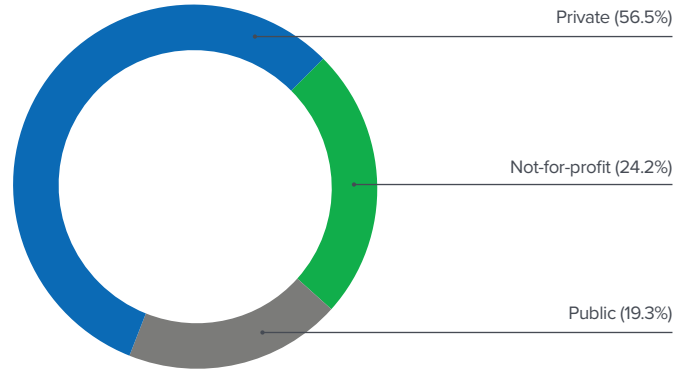
DEMOGRAPHICS

TABLE 4: INDUSTRY SECTOR (414 RESPONSES)

Answer	Percent
Health Care and Social Assistance	17.2%
Education and Training	12.6%
Professional, Scientific and Technical Services	11.1%
Public Administration and Safety	7.5%
Financial and Insurance Services	4.8%
Manufacturing	4.1%
Transport, Postal and Warehousing	4.1%
Construction	3.1%
Administration and Support Services	2.9%
Electricity, Gas, Water and Waste Services	2.7%
Agriculture, Forestry and Fishing	2.4%
Information Media and Telecommunications	1.9%
Arts and Recreation Services	1.9%
Retail Trade	1.9%
Accommodation and Food Services	1.7%
Mining	1.2%
Wholesale Trade	1.2%
Rental, Hiring and Retails Estate Services	1.2%
Other Services	16.4%

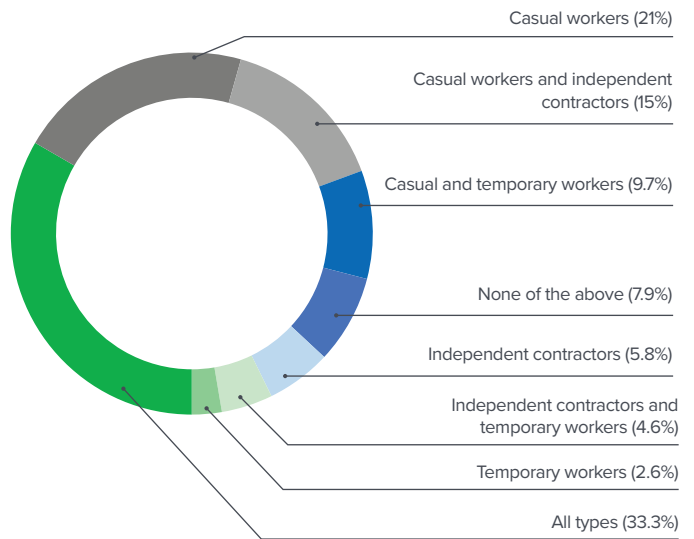
A wide spread of industry sectors is revealed in Table 4, with the largest groups being health care and social assistance (17.2%), education and training (12.6%), and professional, scientific and technical services (11.1%).

FIGURE 3: SECTOR (414 RESPONSES)



A majority of respondents work in the private sector (56.5%), as shown in Figure 3.

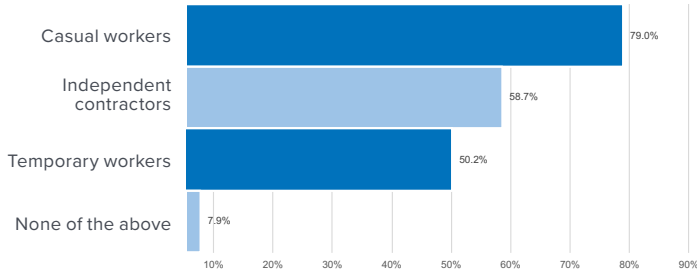
FIGURE 4: ENGAGEMENT OF WORKER TYPES - BY PROPORTION OF RESPONSES (381 RESPONSES)



One third (33.3%) of respondents engaged casual, independent and temporary workers, as shown in Figure 4.

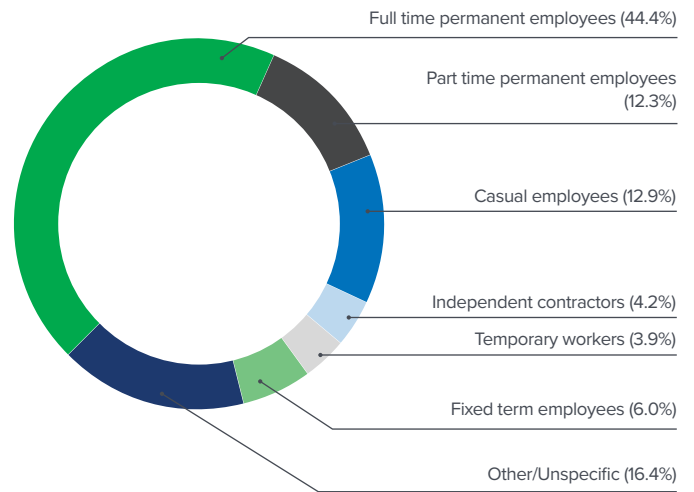
DEMOGRAPHICS

FIGURE 5: HIRING OF WORKER TYPES BY CATEGORY (381 RESPONSES)



In terms of particular worker types, the largest proportion was casual employees (79%), with a low 7.9% reporting, as seen in Figure 5.

FIGURE 6: AVERAGE WORKING COMPOSITION FOR THOSE WHO ENGAGE ALL TYPES OF WORKERS (33.3%, N=138)



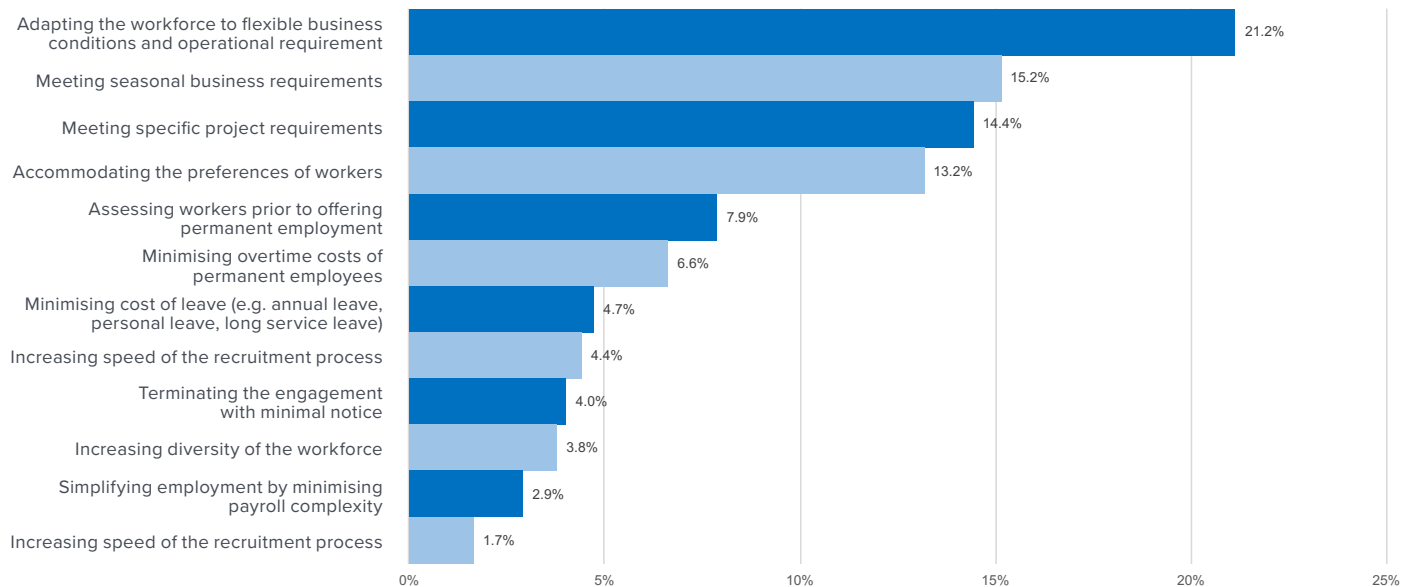
Of those respondents who hire casual, independent and temporary workers and contractors at their organisation (33.3%), their workforce breakdown is captured in Figure 6, with full time employees being the largest employed group (44.4%), followed by casual employees (12.9%) and part time permanent employees (12.3%).

The smallest proportion of this group was temporary workers (3.9%), a relatively low number considering the 50.2% of respondent organisations that engage temporary workers, as seen in Figure 5.

DETAILED FINDINGS

CASUAL EMPLOYEES

FIGURE 7: RANKED REASONS FOR EMPLOYING CASUAL EMPLOYEES (N=327)



Respondents who reported employing casual workers at their organisation were asked to rank the top five reasons for doing so. As reported in Figure 7, adapting the workforce to flexible working environments was ranked as the primary reason (21.2%) for employing casual employees. This was followed by meeting seasonal business requirements (15.2%) and meeting specific project requirements (14.4%).

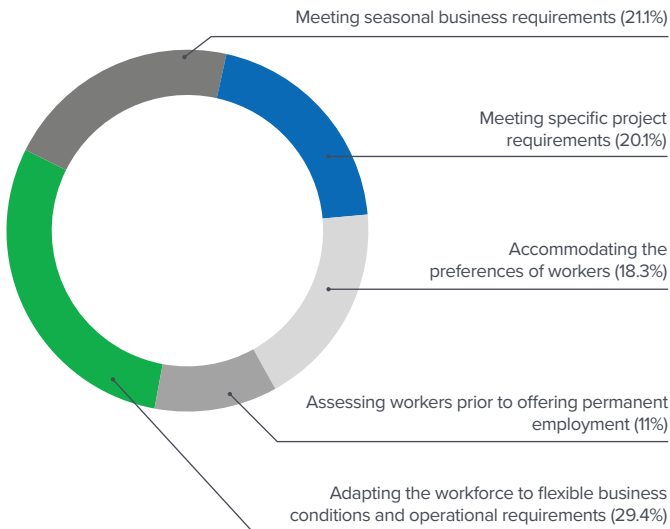
When invited to provide additional reasons for employing casual employees, a sample of respondents said:

- *“Immediate casual relief (e.g. sick leave relief for teaching staff/disability support workers)”*
- *“Providing hands on experience in industry for undergraduates”*
- *“Uncertainty of government funding”*
- *“Ease of approving temporary positions internally rather than permanent”*
- *“Part-time provisions being too restrictive”*
- *“Not being allowed to employ permanent staff over a cap”*
- *“Using casuals for multiple roles and paying them the same hourly rate regardless of type of experience, it saves the organisation money”*
- *“Hospitality requires flexibility”*
- *“Uncertainty of funding”*
- *“Geographical spread and service coverage”*

DETAILED FINDINGS

CASUAL EMPLOYEES

FIGURE 8: PROPORTION OF THE TOP 5 REASONS FOR EMPLOYING CASUAL EMPLOYEES (N=327)



The top 5 reasons to employ casual employees were broken down by percentage in Figure 8, for the purposes of demographic group comparisons. The top reason, ‘adapting the workforce to flexible business conditions and operational requirements’ was consistent across respondents regardless of organisation size, sector and role (less than 5% variance).

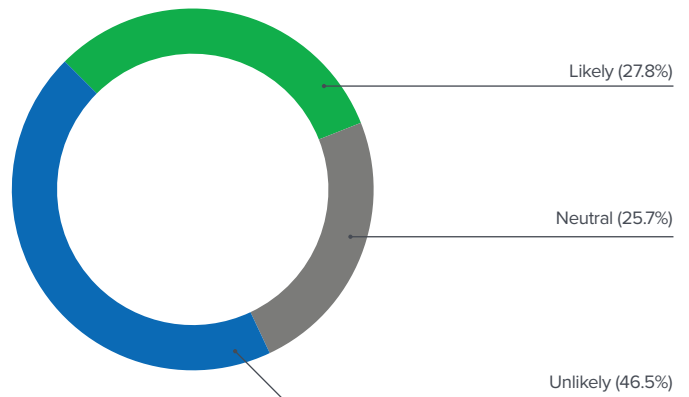
However, ‘meeting seasonal business requirements’ was 6.4% more likely in the public sector (27.3%) than not for profit and private sectors (20.9% and 20.5%, respectively), as well as more important the larger the organisation was (25.5% in very large organisations; 17.3% in small organisations).

‘Assessing workers prior to offering permanent employment’ was more likely in the not for profit sector (20.2%) than the private and public sectors (10.9% and 8%, respectively).

‘Accommodating the preferences of workers’ was most likely in the private sector (18.3%), and least likely in the not for profit sector (12.8%).

Additional demographic reason comparisons can be found in Table 5, Appendix 1.

FIGURE 9: LIKELIHOOD OF ENGAGING CASUAL EMPLOYEES IF THEY MUST BE PERMANENT AFTER 6 MONTHS (N=327)



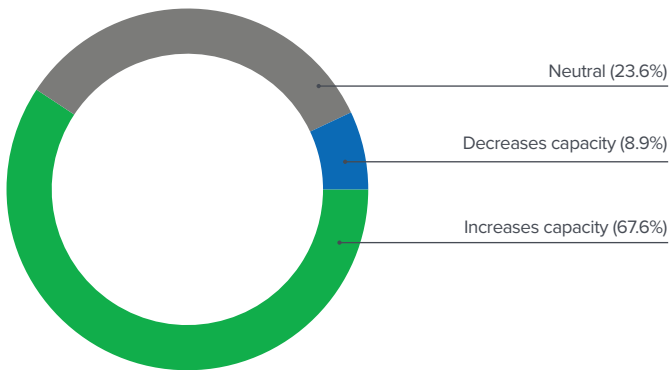
Respondents report that their organisations were unlikely to engage casual employees as full time, if there was a requirement that they must be permanent after 6 months (46.5%), as seen in Figure 9. This view was stronger if the respondent was from the public sector (55.9%), as opposed to private and not for profit sectors (43.7% and 45.7%, respectively)

Additional demographic reason comparisons can be found in Table 6, Appendix 1.

DETAILED FINDINGS

CASUAL EMPLOYEES

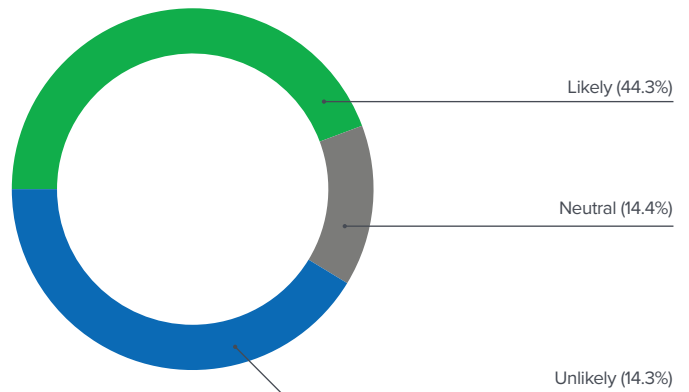
FIGURE 10: HOW THE USE OF CASUAL EMPLOYEES AFFECTS CAPACITY TO GROW BUSINESS (N=327)



A majority of respondents agreed that casual workers increase the capacity of the organisation to grow business (67.6%), as seen in Figure 10. This view was more likely in c-suite/executive roles (85.3%) and in small organisations (79.3%).

Additional demographic reason comparisons can be found in Table 7, Appendix 1.

FIGURE 11: LIKELIHOOD OF REPLACING HOURS WORKED BY CASUAL EMPLOYEES WITH PERMANENT EMPLOYEES, IF CASUAL EMPLOYEES COULD NO LONGER BE USED (N=327)



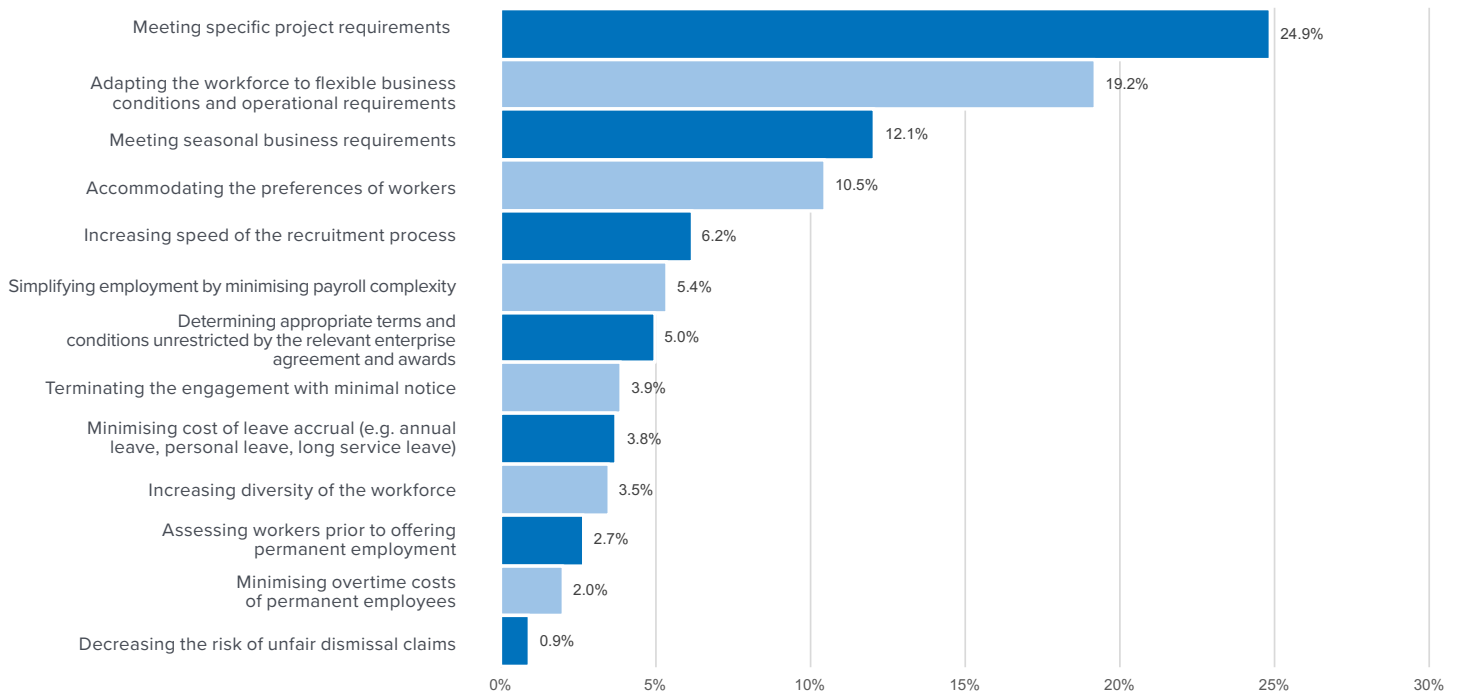
There was a large split in terms of likelihood of replacing hours worked by casual employees with permanent employees, if casual employees could no longer be used, as shown in Figure 11. 44.3% of respondents said that would be likely, and 14.3% said it would be unlikely. The likelihood of replacing hours worked by casual employees with permanent employees in this circumstance was greater in very large organisations (50%) than in small organisations (31%).

Additional demographic reason comparisons can be found in Table 8, Appendix 1.

DETAILED FINDINGS

INDEPENDENT CONTRACTORS

FIGURE 12: RANKED REASONS FOR ENGAGING INDEPENDENT CONTRACTORS (N=241)



Respondent organisations that engaged independent contractors were asked to rank the top 5 reasons for doing so. As reported in Figure 12, meeting specific project requirements was ranked as the primary reason (24.9%) for employing independent contractors. This was followed by adapting the workforce to flexible business conditions and operational requirements (19.2%), and meeting seasonal business requirements (12.1%).

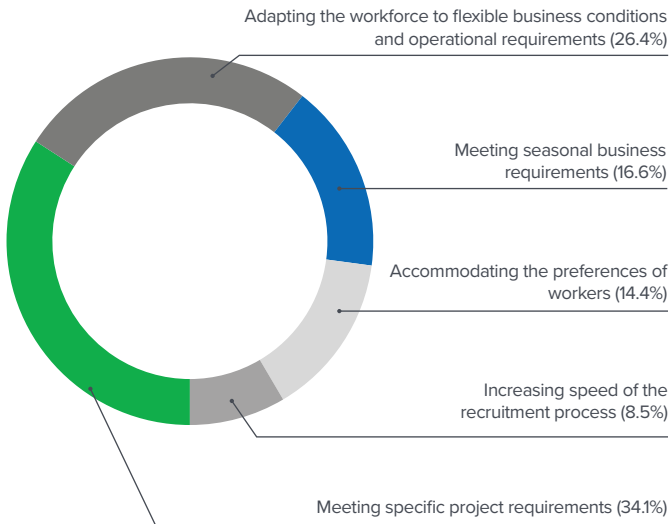
When invited to provide additional reasons for engaging independent contractors, a sample of respondents said:

- *“unique skill set”*
- *“accessing high level capabilities not affordable as fixed term employees”*
- *“assurance of higher productivity”*
- *“accessing capability that we need which we may not be able to afford or require on a permanent basis”*
- *“avoiding complex training requirements”*
- *“being unable to source appropriately qualified talent via usual recruitment channels”*
- *“it’s the way the industry works” - (healthcare and social assistance sector)*
- *“specific range of skillsets”*
- *“global headcount restrictions relating to fixed costs”*
- *“reducing requirement for capital where contractors have their own vehicles”*
- *“can’t find employees”*
- *“shortage of qualified staff”*

DETAILED FINDINGS

INDEPENDENT CONTRACTORS

FIGURE 13: PROPORTION OF THE TOP 5 REASONS FOR ENGAGING INDEPENDENT CONTRACTORS (N=243)



The top 5 reasons to engage independent contractors were broken down by percentage in Figure 13, for the purposes of demographic group comparisons. The top reason, ‘meeting specific project requirements’ was rated less important in the private sector (30.6%) than in the not for profit (39.8%) and public sectors (37.3%).

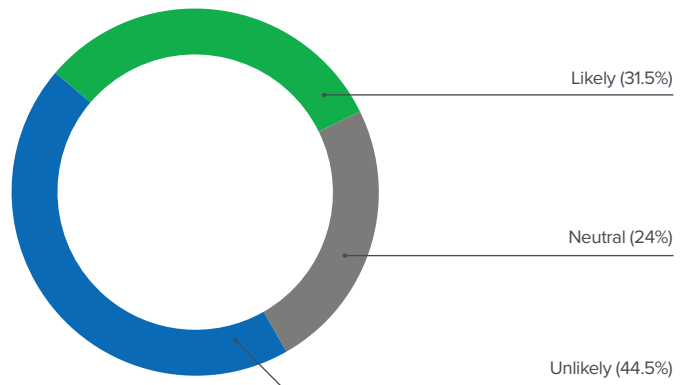
However, employing independent contractors to ‘adapt the workforce to flexible business conditions and operational requirements’ was more likely in the private sector (28.9%) than in not for profit and public sectors (22% and 24.6%, respectively), as well as being seen as more important by those in an HR role (27.6%) than a c-suite/executive role (22.1%) or other role (23.5%).

‘Meeting seasonal business requirements’ was stable across demographics, whereas ‘accommodating the preferences of workers’ was seen as more important in the private sector (17.9%) than the not for profit (12.2%) and public sectors (7.9%), as well as for a c-suite/executive role (19.1%) than an HR role (13.6%) or other role (14.7%).

Finally, employing independent contractors for ‘increasing speed of the recruitment process’ was seen as more likely in the public sector (13.6%) than private (6.6%) or not for profit sectors (8.1%). It was also seen as less important by those in c-suite//executive roles (2.9%) than in HR roles (9.4%) or other roles (8.8%). Further, it was more important for those from very large organisations (11.8%) than those from small organisations (3.1%).

Additional demographic reason comparisons can be found in Table 9, Appendix 2.

FIGURE 14: LIKELIHOOD OF ENGAGING INDIVIDUAL INDEPENDENT CONTRACTORS IF THEY COULD ONLY BE ENGAGED FOR A MAXIMUM OF 12 MONTHS (N=243)



Respondents were split on whether they would engage individual independent contractors if they could only be engaged for a maximum of 12 months, as shown in Figure 14. A large minority were unlikely (44.5%).

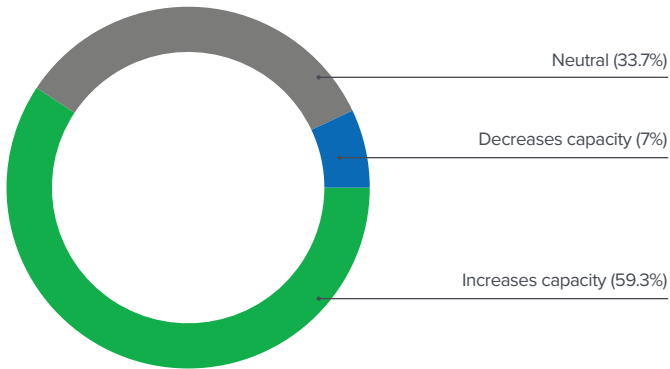
The public sector had a lower likelihood (18.4%) than the private (34.3%) and not for profit (35.1%) sectors. Those in HR roles had a higher likelihood (32.7%) than C-suite/executive roles (28%) and other roles (26.3%).

Additional demographic reason comparisons can be found in Table 10, Appendix 2.

DETAILED FINDINGS

INDEPENDENT CONTRACTORS

FIGURE 15: HOW THE USE OF INDEPENDENT CONTRACTORS AFFECTS CAPACITY TO GROW BUSINESS (N=243)

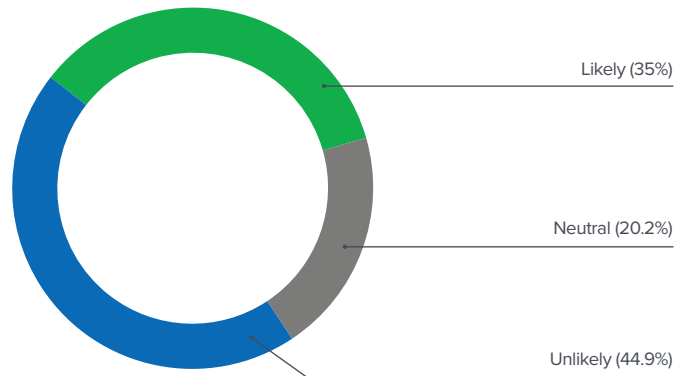


The majority of respondents agreed that independent contractors increase capacity to grow business (59.3%), although this varied across demographic groups, with small organisations being more likely to state that independent contractors increase capacity for growth (79.5%), than medium (61.5%), large (45.9%) and very large organisations (56.7%). Those in the private sector were more likely to report that independent contractors increase capacity (68.4%) than those in public (51.9%) and not for profit sectors (44.8%).

Additionally, those in an HR role were less likely to respond that they increase capacity (54.7%) than c-suite/executives (73.3%) or other roles (71.9%).

Additional demographic reason comparisons can be found in Table 11, Appendix 2.

FIGURE 16: LIKELIHOOD OF REPLACING HOURS WORKED BY INDEPENDENT CONTRACTORS WITH PERMANENT EMPLOYEES, IF INDEPENDENT CONTRACTORS COULD NO LONGER BE USED (N=243)



Respondents were somewhat split on their views about the likelihood of replacing hours worked by independent contractors with permanent employees, if independent contractors could no longer be used. A large proportion stated they were unlikely (44.9%), however many also stated they were likely (35%).

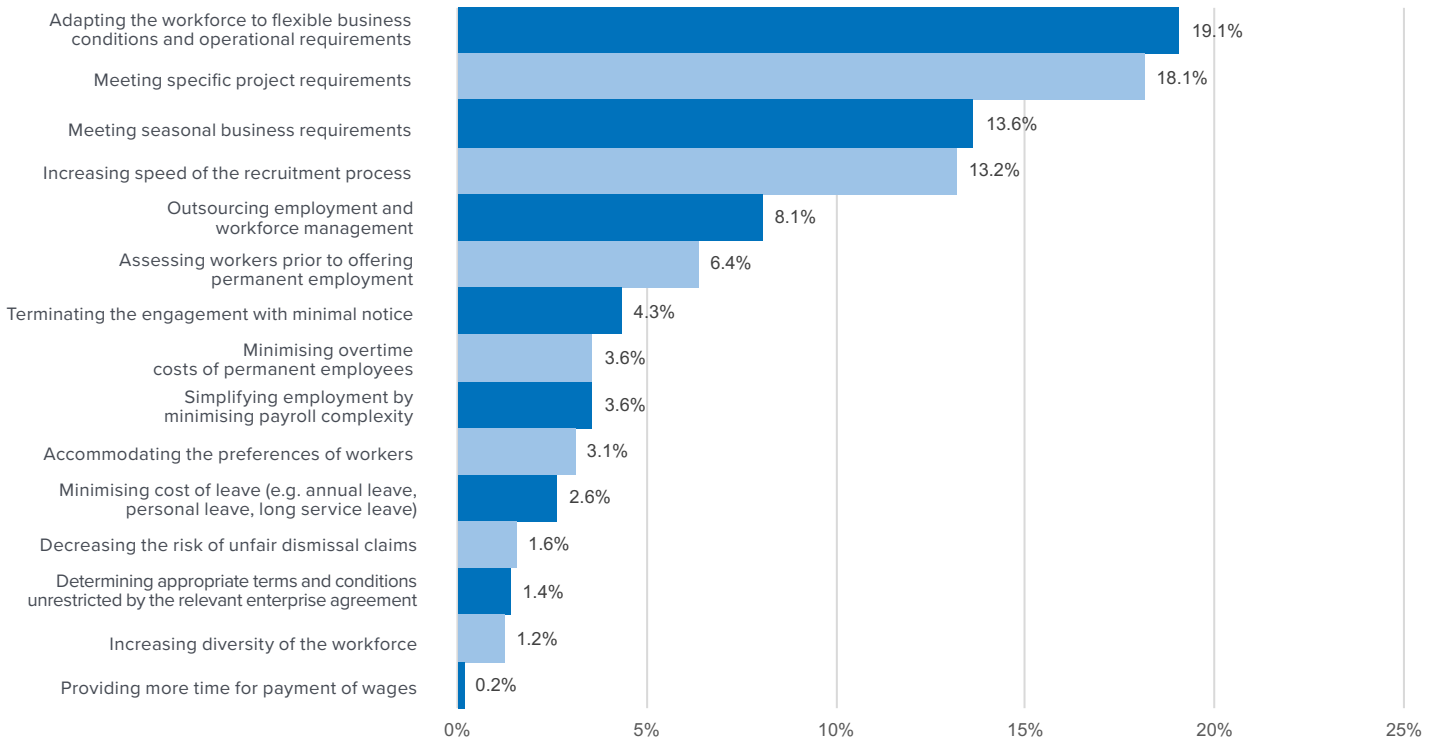
Small organisations were the least likely to replace independent contractor hours with permanent employees (18%), a contrast to the 45.8% likelihood stated by respondents from medium size organisations. Large and very large organisations were closer to the mean likelihood (34.4% and 31.7%, respectively).

Additional demographic reason comparisons can be found in Table 12, Appendix 2.

DETAILED FINDINGS

TEMPORARY WORKERS

FIGURE 17: RANKED REASONS FOR ENGAGING TEMPORARY WORKERS (N=207)



Respondent organisations that engaged temporary workers were asked to rank the top 5 reasons for doing so. As reported in Figure 17, adapting the workforce to flexible business conditions and operational requirements was ranked as the primary reason for engaging temporary workers (19.1%), closely followed by meeting specific project requirements (18.1%), and meeting seasonal business requirements (13.6%).

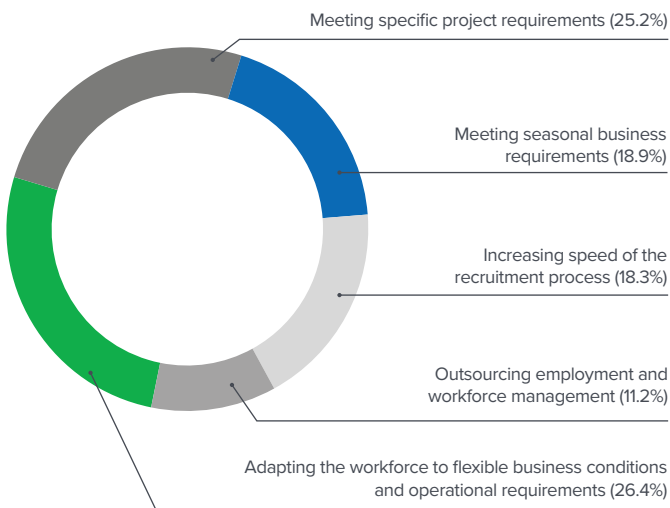
When invited to provide additional reasons for engaging temporary workers, a sample of respondents said:

- *“not enough casual staff”*
- *“comparable labour cost with easier to approve headcount”*
- *“provide skills not currently available in the organisation”*
- *“accessing capability we do not have internally”*
- *“difficulty directly sourcing staff in some locations”*
- *“ease and speed of utilisation when employees are sick or on leave”*
- *“high levels of absence in workforce”*
- *“skills obtained through specialist agency”*
- *“filling an immediate and short-term need”*
- *“for special work we don’t normally do”*
- *“traineeship programs”*
- *“unable to source appropriately skilled talent via usual recruitment channels”*

DETAILED FINDINGS

TEMPORARY WORKERS

FIGURE 18: PROPORTION OF THE TOP FIVE REASONS FOR ENGAGING TEMPORARY WORKERS (N=208)

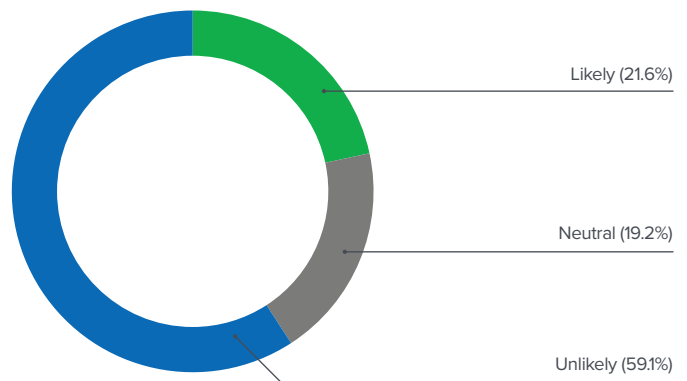


The top 5 reasons to engage temporary workers were broken down by percentage in Figure 18, for the purposes of demographic group comparisons. The reasons were consistent across organisation size (less than 5% variance).

The top reason, ‘adapting the workforce to flexible business conditions and operational requirements’, was more likely in the private sector (29.2%) than in the public (21.9%) and not for profit sectors (25.5%), and was more likely for c-suite/executives (34.4%) than those in HR roles (26.6%). Those in HR roles were more likely to rate ‘meeting specific project requirements’ as important (24.9%) than those in c-suite/executive roles (18.8%). The additional reasons were consistent across demographics.

Additional demographic reason comparisons can be found in Table 13, Appendix 3.

FIGURE 19: LIKELIHOOD OF ENGAGING TEMPORARY WORKERS IF THEY MUST BE DIRECT HIRE EMPLOYEES AFTER 6 MONTHS (N=208)



A majority of respondents reported their organisations were not likely to engage temporary workers if they must be permanent hire employees after 6 months (59.1%), as seen in Figure 19. Those in the public sector had the lowest likelihood (7.8%), compared to private (28.9%) and not for profit sectors (20.8%).

Those in very large organisations were also less likely (9.2%), than large organisations (24.6%) and medium organisations (30.6%). C-suite/executives were a lot more likely (35.3%) than those in HR roles (18.8%).

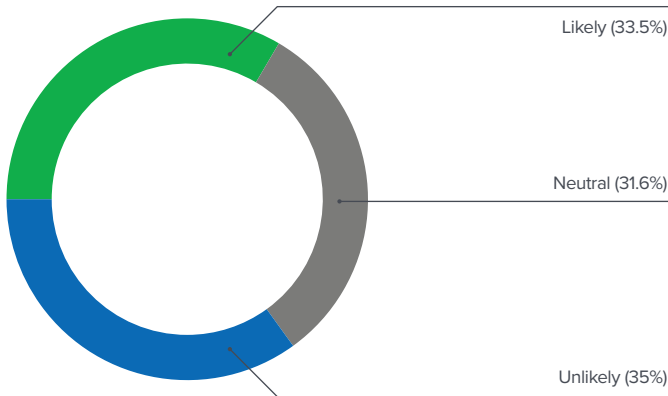
Additional demographic reason comparisons can be found in Table 14, Appendix 3.

¹ ‘Other roles’ and ‘1-19 workers (small organisation)’ were excluded from the analysis due to low sample size (n<15).

DETAILED FINDINGS

TEMPORARY WORKERS

FIGURE 20: LIKELIHOOD OF ENGAGING TEMPORARY WORKERS IF THEY MUST HAVE THE SAME TERMS AND CONDITIONS OF EMPLOYMENT AS YOUR DIRECT HIRE EMPLOYEES DOING THE SAME WORK (N=208)

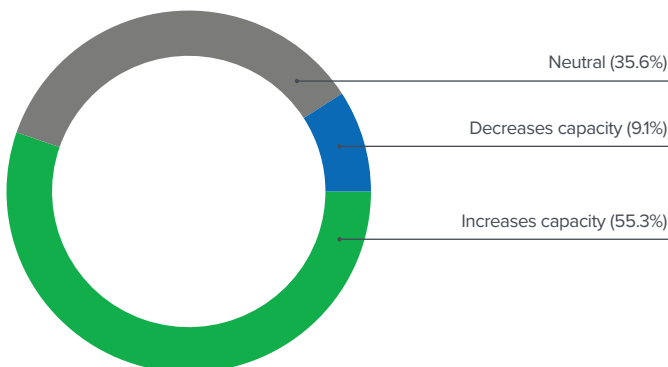


Respondents were evenly split about their views on the likelihood to engage temporary workers and contractors if they must have the same terms and conditions of employment as direct hire employees doing the same work (a likelihood of 33.5% as shown in Figure 20).

They were less likely to hire permanent employees in the not for profit sector (26.4%) than private (36.5%) or public sectors (34.7%). Further, large organisations were less likely (31.3%) than medium (36.7%) or very large organisations (38.5%).

Additional demographic reason comparisons can be found in Table 15, Appendix 3¹.

FIGURE 21: HOW THE USE OF TEMPORARY WORKERS AND CONTRACTORS AFFECTS CAPACITY TO GROW BUSINESS (N=208)

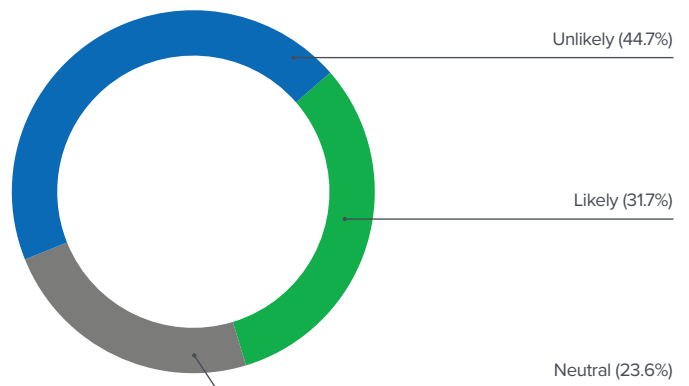


Respondents agreed that temporary workers increase capacity to grow business (55.3%), as seen in Figure 21. They were more likely to do so if in a c-suite/executive role (70.6%) than an HR role (54%).

Those in the not for profit sector were less likely (41.5%) than the private (60.6%) and public sectors (58.8%) to respond that temporary workers increase capacity, as were those in large organisations (44.9%) compared to medium (58.3%) or very large (61.5%).

Additional demographic reason comparisons can be found in Table 16, Appendix 3¹.

FIGURE 22: LIKELIHOOD OF REPLACING HOURS WORKED BY TEMPORARY WORKERS WITH PERMANENT EMPLOYEES, IF TEMPORARY WORKERS COULD NO LONGER BE USED (N=208)



A large minority of respondent organisations were unlikely to replace hours worked by temporary workers with permanent employees, if temporary workers could no longer be used (44.7%), as seen in Figure 22. This figure was stable across demographics, with those who were the most likely being large businesses (37.7%) and the least likely being medium businesses (27.8%).

Additional demographic reason comparisons can be found in Table 17, Appendix 3¹.

¹ 'Other roles' and '1-19 workers (small organisation)' were excluded from the analysis due to low sample size (n<15).

APPENDIX 1 – CASUAL EMPLOYEES DATA (BY DEMOGRAPHIC)

TABLE 5: TOP 5 REASONS FOR EMPLOYING CASUAL EMPLOYEES (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

REASON	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=327)	Not for profit (n=94)	Private (n=174)	Public (n=59)	HR Role (n=262)	C-Suite/ Executive (n=34)	Other role (n=31)	1 - 19 workers (Small organisation) (n=29)	20 - 199 workers (Medium organisation) (n=129)	200 - 999 workers (Large organisation) (n=95)	1000 + workers (Very large organisation) (n=74)
Adapting the workforce to flexible business conditions and operational requirements	29.5%	28.6%	30.6%	27.3%	29.8%	29.2%	26.7%	29.6%	29.8%	29.1%	29.3%
Meeting seasonal business requirements	21.1%	20.9%	20.5%	27.3%	21.7%	16.7%	21.3%	17.3%	20.2%	20.0%	25.5%
Meeting specific project requirements	20.1%	17.6%	19.7%	23.3%	19.8%	25.0%	17.3%	21.0%	20.5%	21.1%	17.9%
Accommodating the preferences of workers	18.4%	12.8%	18.3%	14.0%	17.7%	19.8%	22.7%	23.5%	18.8%	17.0%	17.5%
Assessing workers prior to offering permanent employment	11.0%	20.2%	10.9%	8.0%	11.1%	9.4%	12.0%	8.6%	10.8%	12.8%	9.9%

TABLE 6: LIKELIHOOD OF ENGAGING CASUAL EMPLOYEES IF THEY MUST BE PERMANENT AFTER 6 MONTHS (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

LIKELIHOOD	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=327)	Not for profit (n=94)	Private (n=174)	Public (n=59)	HR Role (n=262)	C-Suite/ Executive (n=34)	Other role (n=31)	1 - 19 workers (Small organisation) (n=29)	20 - 199 workers (Medium organisation) (n=129)	200 - 999 workers (Large organisation) (n=95)	1000 + workers (Very large organisation) (n=74)
Likely	27.8%	28.7%	30.5%	18.6%	27.9%	29.4%	25.8%	31.0%	27.1%	27.4%	28.4%
Neutral	25.7%	25.5%	25.9%	25.4%	26.3%	20.6%	25.8%	24.1%	26.4%	27.4%	23.0%
Unlikely	46.5%	45.7%	43.7%	55.9%	45.8%	50.0%	48.4%	44.8%	46.5%	45.3%	48.7%

TABLE 7: HOW THE USE OF CASUAL EMPLOYEES AFFECTS CAPACITY TO GROW BUSINESS (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

CAPACITY	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=327)	Not for profit (n=94)	Private (n=174)	Public (n=59)	HR Role (n=262)	C-Suite/ Executive (n=34)	Other role (n=31)	1 - 19 workers (Small organisation) (n=29)	20 - 199 workers (Medium organisation) (n=129)	200 - 999 workers (Large organisation) (n=95)	1000 + workers (Very large organisation) (n=74)
Increases capacity	67.6%	68.1%	71.8%	54.2%	65.7%	85.3%	64.5%	79.3%	65.1%	68.4%	66.2%
Neutral	23.6%	24.5%	20.1%	32.2%	24.8%	11.8%	25.8%	17.2%	25.6%	20.0%	27.0%
Decreases capacity	8.9%	7.5%	8.1%	13.6%	9.5%	2.9%	9.7%	3.5%	9.3%	11.6%	6.8%

TABLE 8: LIKELIHOOD OF REPLACING HOURS WORKED BY CASUAL EMPLOYEES WITH PERMANENT EMPLOYEES, IF CASUAL EMPLOYEES COULD NO LONGER BE USED (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

LIKELIHOOD	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=327)	Not for profit (n=94)	Private (n=174)	Public (n=59)	HR Role (n=262)	C-Suite/ Executive (n=34)	Other role (n=31)	1 - 19 workers (Small organisation) (n=29)	20 - 199 workers (Medium organisation) (n=129)	200 - 999 workers (Large organisation) (n=95)	1000 + workers (Very large organisation) (n=74)
Likely	44.3%	44.7%	43.7%	45.8%	45.4%	38.2%	41.9%	31.0%	44.2%	44.2%	50.0%
Neutral	14.4%	18.1%	11.5%	17.0%	14.5%	5.9%	22.6%	10.3%	20.2%	10.5%	10.8%
Unlikely	41.3%	37.2%	44.8%	37.3%	40.1%	55.9%	35.5%	58.6%	35.7%	45.3%	39.2%

APPENDIX 2 – INDEPENDENT CONTRACTORS DATA (BY DEMOGRAPHIC)

TABLE 9: TOP 5 REASONS FOR EMPLOYING INDEPENDENT CONTRACTORS (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

REASON	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=241)	Not for profit (n=57)	Private (n=132)	Public (n=52)	HR role (n=179)	C-suite/executive (n=30)	Other (n=32)	1 - 19 workers (small organisation) (n=39)	20 - 199 workers (medium organisation) (n=81)	200 - 999 workers (large organisation) (n=61)	1000 + workers (very large organisation) (n=60)
Meeting specific project requirements	34.1%	39.8%	30.6%	37.3%	33.3%	36.8%	36.8%	33.3%	32.1%	34.1%	37.8%
Adapting the workforce to flexible business conditions and operational requirements	26.4%	22.0%	28.9%	24.6%	27.6%	22.1%	23.5%	27.1%	27.8%	23.5%	26.8%
Meeting seasonal business requirements	16.6%	17.9%	16.0%	17.0%	16.3%	19.1%	16.2%	18.8%	16.0%	16.7%	15.8%
Accommodating the preferences of workers	14.4%	12.2%	17.9%	7.6%	13.6%	19.1%	14.7%	17.7%	15.0%	17.4%	7.9%
Increasing speed of the recruitment process	8.5%	8.1%	6.6%	13.6%	9.4%	2.9%	8.8%	3.1%	9.1%	8.3%	11.8%

TABLE 10: LIKELIHOOD OF ENGAGING INDIVIDUAL INDEPENDENT CONTRACTORS IF THEY COULD ONLY BE ENGAGED FOR A MAXIMUM OF 12 MONTHS (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

LIKELIHOOD	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=241)	Not for profit (n=57)	Private (n=132)	Public (n=52)	HR role (n=179)	C-suite/executive (n=30)	Other (n=32)	1 - 19 workers (small organisation) (n=39)	20 - 199 workers (medium organisation) (n=81)	200 - 999 workers (large organisation) (n=61)	1000 + workers (very large organisation) (n=60)
Likely	31.5%	35.1%	34.3%	18.4%	32.7%	28.0%	26.3%	33.3%	29.6%	33.9%	30.6%
Neutral	24.0%	26.3%	22.9%	23.7%	24.4%	20.0%	26.3%	19.1%	25.4%	22.0%	26.5%
Unlikely	44.5%	38.6%	42.9%	57.9%	43.0%	52.0%	47.4%	47.6%	45.1%	44.1%	42.9%

TABLE 11: HOW THE USE OF INDEPENDENT CONTRACTORS AFFECTS CAPACITY TO GROW BUSINESS (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

CAPACITY	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=241)	Not for profit (n=57)	Private (n=132)	Public (n=52)	HR role (n=179)	C-suite/executive (n=30)	Other (n=32)	1 - 19 workers (small organisation) (n=39)	20 - 199 workers (medium organisation) (n=81)	200 - 999 workers (large organisation) (n=61)	1000 + workers (very large organisation) (n=60)
Increases capacity	59.3%	44.8%	68.4%	51.9%	54.7%	73.3%	71.9%	79.5%	61.5%	45.9%	56.7%
Neutral	33.7%	46.6%	24.1%	44.2%	37.6%	23.3%	21.9%	15.4%	30.1%	45.9%	38.3%
Decreases capacity	7.0%	8.6%	7.5%	3.9%	7.7%	3.3%	6.3%	5.1%	8.4%	8.2%	5.0%

TABLE 12: LIKELIHOOD OF REPLACING HOURS WORKED BY INDEPENDENT CONTRACTORS WITH PERMANENT EMPLOYEES, IF INDEPENDENT CONTRACTORS COULD NO LONGER BE USED (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

LIKELIHOOD	MEAN	SECTOR			ROLE			SIZE			
	All respondents (n=241)	Not for profit (n=57)	Private (n=132)	Public (n=52)	HR role (n=179)	C-suite/executive (n=30)	Other (n=32)	1 - 19 workers (small organisation) (n=39)	20 - 199 workers (medium organisation) (n=81)	200 - 999 workers (large organisation) (n=61)	1000 + workers (very large organisation) (n=60)
Likely	35.0%	31.0%	38.4%	30.8%	36.5%	36.7%	25.0%	18.0%	45.8%	34.4%	31.7%
Neutral	20.2%	13.8%	19.6%	28.9%	20.4%	23.3%	15.6%	20.5%	21.7%	19.7%	18.3%
Unlikely	44.9%	55.2%	42.1%	40.4%	43.1%	40.0%	59.4%	61.5%	32.5%	45.9%	50.0%

APPENDIX 3 – TEMPORARY WORKERS DATA (BY DEMOGRAPHIC)

N.B.: 'Other roles' and '1-19 workers (small organisation)' were excluded from the analysis due to low sample size (n<15)

**TABLE 13: TOP 5 REASONS FOR EMPLOYING TEMPORARY WORKERS
(CUT BY SECTOR, ROLE AND ORGANISATION SIZE)**

REASON	MEAN	SECTOR			ROLE		SIZE			
	All respondents Mean (n=207)	Not for profit (n=53)	Private (n=104)	Public (n=50)	HR role (n=176)	C-suite/ executive (n=17)	20 - 199 workers (Medium organisation) (n=71)	200 - 999 workers (Large organisation) (n=69)	1000 + workers (Very large organisation) (n=65)	1000 + workers (very large organisation) (n=65)
Adapting the workforce to flexible business conditions and operational requirements	26.5%	25.5%	29.2%	21.9%	26.6%	34.4%	24.9%	28.1%	26.5%	37.8%
Meeting specific project requirements	25.2%	24.6%	25.0%	26.1%	24.9%	18.8%	25.4%	24.0%	25.2%	26.8%
Meeting seasonal business requirements	18.9%	20.0%	17.0%	21.9%	20.2%	15.6%	17.8%	17.8%	21.8%	15.8%
Increasing speed of the recruitment process	18.3%	21.8%	17.0%	17.7%	17.9%	18.8%	20.7%	17.1%	17.0%	7.9%
Outsourcing employment and workforce management	11.2%	8.2%	11.9%	12.6%	10.5%	12.5%	11.2%	13.0%	9.5%	11.8%

TABLE 14: LIKELIHOOD OF ENGAGING TEMPORARY WORKERS IF THEY MUST BE DIRECT HIRE EMPLOYEES AFTER 6 MONTHS (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

REASON	MEAN	SECTOR			ROLE		SIZE			
	All respondents Mean (n=208)	Not for profit (n=53)	Private (n=104)	Public (n=50)	HR role (n=176)	C-suite/ executive (n=17)	20 - 199 workers (Medium organisation) (n=71)	200 - 999 workers (Large organisation) (n=69)	1000 + workers (Very large organisation) (n=65)	1000 + workers (very large organisation) (n=65)
Likely	21.6%	20.8%	28.9%	7.8%	18.8%	35.3%	30.6%	24.6%	9.2%	37.8%
Neutral	19.2%	22.6%	16.4%	21.6%	20.5%	5.9%	16.7%	14.5%	26.2%	26.8%
Unlikely	59.1%	56.6%	54.8%	70.6%	60.8%	58.8%	52.8%	60.9%	64.6%	15.8%

TABLE 15: LIKELIHOOD OF ENGAGING TEMPORARY WORKERS IF THEY MUST HAVE THE SAME TERMS AND CONDITIONS OF EMPLOYMENT AS YOUR DIRECT HIRE EMPLOYEES DOING THE SAME WORK (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

REASON	MEAN	SECTOR			ROLE		SIZE			
	All respondents Mean (n=208)	Not for profit (n=53)	Private (n=104)	Public (n=50)	HR role (n=176)	C-suite/ executive (n=17)	20 - 199 workers (Medium organisation) (n=71)	200 - 999 workers (Large organisation) (n=69)	1000 + workers (Very large organisation) (n=65)	1000 + workers (very large organisation) (n=65)
Likely	33.5%	26.4%	36.5%	34.7%	34.3%	35.3%	36.7%	31.3%	38.5%	37.8%
Neutral	31.6%	37.7%	27.9%	32.7%	33.7%	17.7%	28.3%	32.8%	32.7%	26.8%
Unlikely	35.0%	35.9%	35.6%	32.7%	32.0%	47.1%	35.0%	35.9%	28.9%	15.8%

APPENDIX 3 – TEMPORARY WORKERS DATA (BY DEMOGRAPHIC)

N.B.: 'Other roles' and '1-19 workers (small organisation)' were excluded from the analysis due to low sample size (n<15)

TABLE 16: HOW THE USE OF TEMPORARY WORKERS AFFECTS CAPACITY TO GROW BUSINESS
(CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

REASON	MEAN	SECTOR			ROLE		SIZE			
	All respondents Mean (n=208)	Not for profit (n=53)	Private (n=104)	Public (n=50)	HR role (n=176)	C-suite/ executive (n=17)	20 - 199 workers (Medium organisation) (n=71)	200 - 999 workers (Large organisation) (n=69)	1000 + workers (Very large organisation) (n=65)	1000 + workers (very large organisation) (n=65)
Increases capacity	55.3%	41.5%	60.6%	58.8%	54.0%	70.6%	58.3%	44.9%	61.5%	37.8%
Neutral	35.6%	49.1%	31.7%	29.4%	37.5%	23.5%	30.6%	47.8%	29.2%	26.8%
Decreases capacity	9.1%	9.4%	7.7%	11.8%	8.5%	5.9%	11.1%	7.3%	9.2%	15.8%

TABLE 17: LIKELIHOOD OF REPLACING HOURS WORKED BY TEMPORARY WORKERS WITH PERMANENT EMPLOYEES, IF TEMPORARY WORKERS AND CONTRACTORS COULD NO LONGER BE USED (CUT BY SECTOR, ROLE AND ORGANISATION SIZE)

REASON	MEAN	SECTOR			ROLE		SIZE			
	All respondents Mean (n=208)	Not for profit (n=53)	Private (n=104)	Public (n=50)	HR role (n=176)	C-suite/ executive (n=17)	20 - 199 workers (Medium organisation) (n=71)	200 - 999 workers (Large organisation) (n=69)	1000 + workers (Very large organisation) (n=65)	1000 + workers (very large organisation) (n=65)
Likely	31.7%	34.0%	29.8%	33.3%	31.3%	41.2%	27.8%	37.7%	30.8%	37.8%
Neutral	23.6%	17.0%	23.1%	31.4%	23.9%	17.7%	29.2%	18.8%	21.5%	26.8%
Unlikely	44.7%	49.1%	47.1%	35.3%	44.9%	41.2%	43.1%	43.5%	47.7%	15.8%



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