
Expert Report from Associate Professor Sara Charlesworth to the Shop Distributive and Allied Employees Association for use in the Review being undertaken by Fair Work Australia of the terms of various modern awards pursuant to Item 6 of Schedule 5 of the *Fair Work Act (Transitional Provisions and Consequential Amendments) 2009*

1. I am an Associate Professor and Principal Research Fellow at the Centre for Work+Life at the University of South Australia. As set out in my CV (attached), I have a PhD in Legal Studies and significant experience as a researcher in the areas of employment regulation and gender equality.
2. In my report, which addresses the impact of working on weekends and in the evenings on the work-life interference experienced by employees, I draw on two large-scale surveys of employees. The first is the Australian Work and Life Index (AWALI) survey carried out in 2008, one of a series of AWALI surveys, and the second is the Victorian Work and Life (VicWAL) survey run in 2009. Both surveys use the measure of work-life interference developed by Professor Pocock, Dr Williams and Dr Skinner at the Centre for Work & Life in 2007,¹ and refined in 2008.²

The AWALI MEASURE

3. For the purposes of the AWALI measure, 'work' is defined as paid work. 'Life' is defined as the activities outside paid work including activities in the household and with friends, family and community; care activities including self-care and care of others; and community, sporting and other unpaid, voluntary activities. In this way, the definition of 'life' subsumes 'family' issues.³
4. AWALI measures two dimensions of work-life interaction: firstly, the impact of work on respondents' capacity to satisfactorily engage in the activities and responsibilities of the non-work sphere (which is termed a 'general interference' effect); and, secondly, the time available to spend on activities outside work (which is viewed as a 'time strain' effect).⁴ In sum, AWALI measures perceptions of work-life interaction along five dimensions, focussing on:
 - 'General interference' (i.e., the frequency with which work interferes with responsibilities or activities outside work);
 - 'Time strain' (i.e., the frequency with which work restricts time with family or friends);
 - Work-to-community interaction, measuring the frequency with which work affects workers' ability to develop or maintain connections and friendships in their local community;
 - Satisfaction with overall work-life 'balance'; and
 - Frequency of feeling 'rushed or pressed for time'.

¹ The concepts, methods, literature, measures and pre-tests underpinning AWALI are set out in Pocock, B. Williams, P. and Skinner, N. (2007) *The Australian Work and life Index (AWALI): Concepts Methodology & Rationale*, Centre for Work+Life, University of South Australia, Adelaide.

² Skinner, N. and Pocock, B. (2008) *Work-Life and Workplace Culture: The Australian Work and Life Index 2008* Centre for Work+Life, University of South Australia, Adelaide

³ Pocock et al. (2007), p 9.

⁴ Skinner and Pocock (2008), p 15.

5. The AWALI measure brings together these five indicators of work-life interaction to arrive at an overall work-life index that is scaled from 0 (best work-life interaction) to 100 (worst work-life interaction). The work-life index has a satisfactory internal consistency or reliability (Cronbach's α (alpha) = .82). In 2008, the average (mean) AWALI score index was 42.8, and the median was 40.0 (the middle score). Therefore, scores above the average score of around 43 indicate a work-life interaction that is worse than average, and scores below this level indicate a better than average work-life relationship.
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BACKGROUND TO THE 2008 AWALI SURVEY

6. The AWALI surveys in 2007, 2008, 2009 and 2010 were funded through an Australian Research Council (ARC) Linkage grant in partnership with the South Australian (through SafeWork SA) and Western Australian Governments (through the former State Health Advisory Committee on Work Life Balance). Professor Barbara Pocock was the chief investigator on the project. In 2008, the Victorian Government (through Industrial Relations Victoria) also provided additional support to the 2008 AWALI survey.
7. The 2012 AWALI survey has just been conducted and another is due to be conducted in 2014. These AWALI surveys are also funded by an Australian Research Council Linkage grant in partnership with the SA government (through SafeWork SA) and the Australian Government (through the Department of Education, Employment and Workplace Relations).
8. All AWALI surveys contain a core set of items relating to employment and social demographics, the work-life index items and additional sets of questions on one or two particular themes.
9. AWALI 2008 was a nationally representative survey of 2,831 employed persons (including 387 self-employed). Newspoll conducted the survey using computer assisted telephone interviews (CATI) over four weekends in March and April 2008. A subset of this core sample (1,404 respondents) answered both the core questions and an additional set of items relating to unsocial work time, employment sector (public, private) and organisational culture. These additional questions included the following questions:
 - How often do you work on weekends, Saturdays or Sundays - never, rarely, sometimes, often, almost always;
 - How often do you work evenings/nights past 9 pm - never, rarely, sometimes, often, almost always.

These and other questions related to unsocial work time are scheduled to be asked again in the 2014 AWALI survey.

10. To ensure a nationally representative sample, the survey data was weighted by Australian Bureau of Statistics (ABS) 2007 population data on age, highest level of schooling completed, sex, and area (capital city and balance of state) to adjust for differences in the AWALI sample and the general Australian population on these key demographics.
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BACKGROUND TO THE 2009 VicWAL SURVEY

11. The Victorian Work and Life Survey (VicWAL), part of the Regional Perspective on Work/Family Balance and Changes in Employment Regulation project, was funded through an ARC Linkage grant in partnership with the Victorian government (thorough Industrial Relations Victoria and Regional Development Victoria). I was the lead chief investigator on the project and Dr Iain Campbell of RMIT University and Professor Marian Baird of the University of Sydney were also chief investigators.
12. One of the key aims of the VicWAL survey was to investigate how regional and industry differences in employment conditions are associated with the capacity to balance work and family, and work and community life. To that end the VicWAL survey, with the permission of Professor Pocock, also incorporated the five-item AWALI measures in the survey instrument.

13. The VicWAL survey was conducted by the Social Research Centre in Melbourne through a CATI methodology over four weeks in July 2009.⁵ There were a total of 3,007 employee respondents to the survey. The survey questions covered a wide range of topics relating to socio demographics, employment and working time conditions as well as work-life balance. These included the following questions:
- Do you usually work on weekends? - Yes, No;
 - Do you usually work any hours between 7 pm and 7 am? – Yes, No.
14. The VicWAL sample was weighted for age, sex and location, using August 2009 ABS Labour Force data for employed persons aged 15 and over in Victoria to adjust for differences on these key demographics in the VicWAL sample and the general Victorian employee population.

EXPLANATION OF ANALYSIS & STATISTICAL CONVENTIONS USED IN ANALYSIS OF AWALI 2008 and VICWAL 2009 & LIMITATIONS OF THE ANALYSIS

15. The analysis of both the AWALI and the VicWAL surveys follows the social science threshold convention, which sets a minimum of 20 respondents that must be in a cell for that figure to be considered reliable. Estimates that do not meet this threshold requirement are generally marked by an asterisk indicating that this figure should be interpreted with caution. In the analysis undertaken for this report, this convention means that we cannot reliably assess the impact of usually working evenings on retail industry employees from the AWALI 2008 dataset, as the numbers of retail industry employees who usually work in the evenings are too small.
16. All comparisons discussed in this report are statistically significant, unless otherwise noted. A p value where $p < 0.05$ is considered 'statistically significant' (that is, we can be 95% sure that these results did not occur by chance) and a p value where $P < 0.001$ is considered 'statistically highly significant' (where we can be 99% sure that these results did not occur due to chance). The p values in the analysis for this report are provided in the relevant tables in the Appendices.
17. Mean scores are provided for the AWALI index in both surveys. Mean scores are not percentages. In general, average AWALI scores that are below or above the average for all employees indicate better or worse outcomes in terms of work-life interaction. In AWALI 2008 the average AWALI score was 42.8 and in the VicWAL survey 2009 the average AWALI score was 41.27. In particular, as is the case in this report, any differences between average AWALI scores for two groups, such as between those who usually work on weekends and those who do not usually do so, can be assessed in terms of statistical significance.
18. As work hours have an impact on work-life interference (as hours increase work-life interference also tends to increase), work hours have been entered as a covariate in some analyses in which the average AWALI scores of retail employees are compared with those for employees from other industries. This means that the effect of work hours on the index scores is removed, or 'controlled', to observe the effect of, for example, working on weekends or in evenings/7pm to 7am on AWALI scores. This type of analysis essentially asks the 'what if' question of how work-life interference differs between groups (e.g. between those who usually work on weekends and those who do not usually do so) if they worked the same hours. For example, 'what if those who worked weekends and those who don't worked the same hours, would there be any difference in their work-life interference?'⁶ This can be important when comparing retail employees with employees from other industries, as a greater proportion of retail employees work on a part-time basis than do employees generally.

⁵ For details see Haynes, K., Charlesworth, S., Baird, M., Campbell, I. and Bamberly, L. (2010) *Victorian Work and Life Survey (VicWAL); Technical report* Centre for Applied Social Research, RMIT University, Melbourne.

⁶ Skinner and Pocock (2008), p 16.

19. There are some general qualifications to the analysis in this report.

- The question about working weekends in both the AWALI 2008 and VicWAL 2009 surveys was a general one and the results cannot be disaggregated into Saturdays or Sundays.
- There are some small differences between the two surveys in results on similar variables for total employees. Such differences may be partly explained as the AWALI 2008 survey was a nationally representative one whereas the VicWAL survey was representative at the Victorian level. Differences may also be due to the fact that the relevant 2008 AWALI survey questions asked respondents to indicate *how often they worked* on weekends/evenings, whereas the relevant VicWAL questions asked respondents *if they usually worked* on weekends/between 7 pm to 7 am. Further, the phrasing of questions relating to working evenings/nights past 9 pm in AWALI are likely to have elicited different responses to the VicWAL survey, which asked about working between 7 pm to 7 am. However, the overall trends in both surveys are substantially similar.
- While both the AWALI 2008 and VicWAL surveys are generally representative of the relevant Australian and Victorian populations at the time they were run, neither survey was designed to be specifically representative of retail industry employees. However, given the VicWAL survey includes a larger sample of retail industry employees (322 employees) than does the AWALI 2008 survey (118 employees), the results of the specific analysis of retail employees from the VicWAL survey dataset is likely to be more representative.

OVERVIEW OF AWALI 2008 AND VicWAL 2009 ANALYSIS

20. Analysis of the AWALI 2008 and the 2009 VicWAL surveys indicates a strong and consistent trend: employees usually working on weekends or usually working in the evenings/nights or past 9 pm/between 7 pm to 7 am experience worse work-life interference than do employees who do not usually work these hours. The differences in average AWALI scores between employees who usually work weekends or in the evenings and those who do not are statistically highly significant.
21. In terms of the individual measures that comprise the AWALI index, analysis of both the AWALI 2008 and VicWAL 2009 surveys indicates that employees who usually work on weekends are at least *twice as likely* as those who do not, to report that their work often, or almost always, interferes with their responsibilities or activities outside of work *and* that their work keeps them from spending the amount of time they would like with family or friends.
22. Focusing the analysis on employees working in the retail industry the VicWAL survey highlights a similar trend as for employees generally i.e. usually working on weekends has a statistically significant negative impact on employees' work-life balance. In the AWALI 2008 survey, the differences between retail employees who usually work on weekends and those who do not are not, however, statistically significant. While there are insufficient employees in the AWALI 2008 sample to analyse the work life interference effect for retail industry employees working in the evenings, the analysis of the VicWAL data indicates that those retail employees usually working between 7 pm to 7 am experience worse work-life interference than those who do not usually work these hours. The difference in AWALI scores between these two groups of retail industry employees is statistically highly significant.
23. In both the 2008 AWALI and VicWAL surveys, when hours are controlled for, there is no statistically significant difference between retail employees and employees in other industries in terms of the impact of working on weekends on work/life outcomes. The VicWAL survey indicates similar results when comparing the impact of working between 7 pm and 7am on retail employees and on employees from other industries.

ANALYSIS OF SELECTED AWALI 2008 SURVEY DATA

24. AWALI 2008 surveyed 2,831 employed persons (including 387 self-employed). A subset of this core sample (1,404 respondents) answered both the core questions and an additional set of items relating to unsocial work time, employment sector (public, private) and organisational culture. Of this subset, 1,194 were employees of whom:

- 36% worked on weekends (often, almost always);
- 20% worked on nights/evenings after 9pm (often, almost always);
- 51% of the 118 employee respondents in the retail industry worked weekends (often, almost always);
- 14% of the 118 employee respondents in the retail industry worked evenings/nights after 9pm (often, almost always).

All employees

25. Based on the AWALI measure of work-life interference where higher scores indicate worse work-life interference, analysis indicates:

- Those who often or almost always, work weekends have an average AWALI score of 49.09 compared to a score of 36.01 for those who do not. This difference is statistically highly significant;
- Those who often or almost always work evening after 9pm have an average AWALI score of 53.21 compared to a score of 37.49 for those who do not. This difference is statistically highly significant.

26. Looking at the five individual measures of work-life interference that make up the AWALI index, those who often, or almost always, work weekends are significantly more likely than those who never, rarely or sometimes work weekends, to say:

- Their work almost always, or often, interferes with their responsibilities or activities outside work (34% compared to 9% for those who never, rarely or sometimes work weekends). This difference is statistically highly significant;
- Their work almost always, or often, keeps them from spending the amount of time they would like with family or friends (37% compared to 16% for those who never, rarely or sometimes work weekends). This difference is statistically highly significant;
- Their work almost always, or often, interferes with their ability to develop or maintain connections and friendships in their community (30% compared to 11% of those who never, rarely or sometimes work weekends). This difference is statistically highly significant;
- Thinking about their life in general, 60% said they almost always, or often, feel rushed and pressed for time compared to 22% of those who never, rarely or sometimes work weekends). This difference is statistically highly significant;
- Thinking about their work right now, 22% said they are not very, or not at all, satisfied with the balance between their work and the rest of their life compared to 15% who never, rarely or sometimes work weekends. This difference is statistically highly significant.

Retail industry employees

27. Based on the AWALI index of work-life interference where higher scores indicate worse work-life interference, analysis of data for retail employees indicates:

- Those who often, or almost always work weekends have an average AWALI score of 42.69 compared to 36.85 for those who do not. However this difference is not statistically significant.

28. Because of the low numbers of retail employees in the AWALI 08 sample who often or almost always, work nights/evenings after 9pm, it is not possible to compare AWALI scores as cell sizes are too small to be reliable.

Retail industry v other employees

29. We can compare the impact of working weekends on work-life interference between retail employees and employees who work in other industries.
30. When controlling for hours worked, working on weekends was significantly associated with higher AWALI scores. Working in the retail industry when compared to working in other industries had no significant effect on average AWALI scores. This means that the influence of working weekends on work life interference was *not* affected by whether or not employees worked in the retail sector.

ANALYSIS OF SELECTED VicWAL 2009 SURVEY DATA

31. VicWAL is a representative survey of 3,007 Victorian employees of whom:
 - 35% usually worked on weekends;
 - 34% usually worked between 7 pm and 7 am;
 - 61% of the 322 employee respondents in the retail industry usually worked weekends;
 - 34% of the 322 employee respondents in the retail industry usually worked between 7 pm and 7 am.

All employees

32. Based on the AWALI index of work-life interference where higher scores indicate worse work-life interference:
 - Those who usually work weekends have an average AWALI score of 46.58 compared to a score of 38.37 for those who do not. This difference is statistically highly significant;
 - Those who usually work between 7 pm and 7 am have an average AWALI score of 47.85 compared to a score of 37.83 for those who do not. This difference is statistically highly significant.
33. Looking at the five measures of work-life interference that make up the AWALI index, those who usually work weekends are significantly more likely than those who do not work weekends to say:
 - Their work almost always, or often, interferes with their responsibilities or activities outside work (30% compared to 16% of those who do not usually work weekends). This difference is statistically highly significant;
 - Their work almost always or often keeps them from spending the amount of time they would like with family or friends (34% compared to 17% of those who do not usually work weekends). This difference is statistically highly significant;
 - Their work almost always, or often, interferes with their ability to develop or maintain connections and friendships in their community (24% compared to 13% of those who do not usually work weekends). This difference is statistically highly significant;
 - Thinking about their work right now, 19% are not very, or not at all, satisfied with the balance between their work and the rest of their life compared to 13% of those who do not work weekends. This difference is statistically highly significant.
34. There was no statistically significant difference between those who usually work on weekends, and those who do not, in their response to the question:
 - Thinking about your life in general how often do you feel rushed and pressed for time: 55% of those who usually work weekends said this was the case almost always, or often, compared to 54% of those who did not usually work weekends.

Retail industry employees

35. Analysis of VicWAL data for retail employees indicates:

- Retail employees who usually work weekends have an average AWALI score of 40.42 compared to 34.82 for those who do not. This difference is statistically significant;
- Retail employees who usually work between 7 pm and 7 am have an average AWALI score of 44.18 compared to 35.18 for those who do not. This difference is statistically highly significant;

Retail industry v other employees

36. We can compare the impact of working weekends and working between 7pm and 7am on work-life interference between retail employees and employees who work in other industries.

37. When hours worked are controlled for, working on weekends was significantly associated with higher AWALI scores. Working in the retail industry had no significant effect on average AWALI scores when compared to those working in other industries. That is, the influence of working weekends on work life interference was not affected by whether or not employees worked in the retail sector.

38. When controlling for hours worked, working between 7pm-7am was significantly associated with higher AWALI scores. Working in the retail industry had no significant effect on average AWALI scores when compared to those working in other industries. That is, the influence of working between 7pm to 7am on work life interference was not affected by whether or not employees worked in the retail sector.