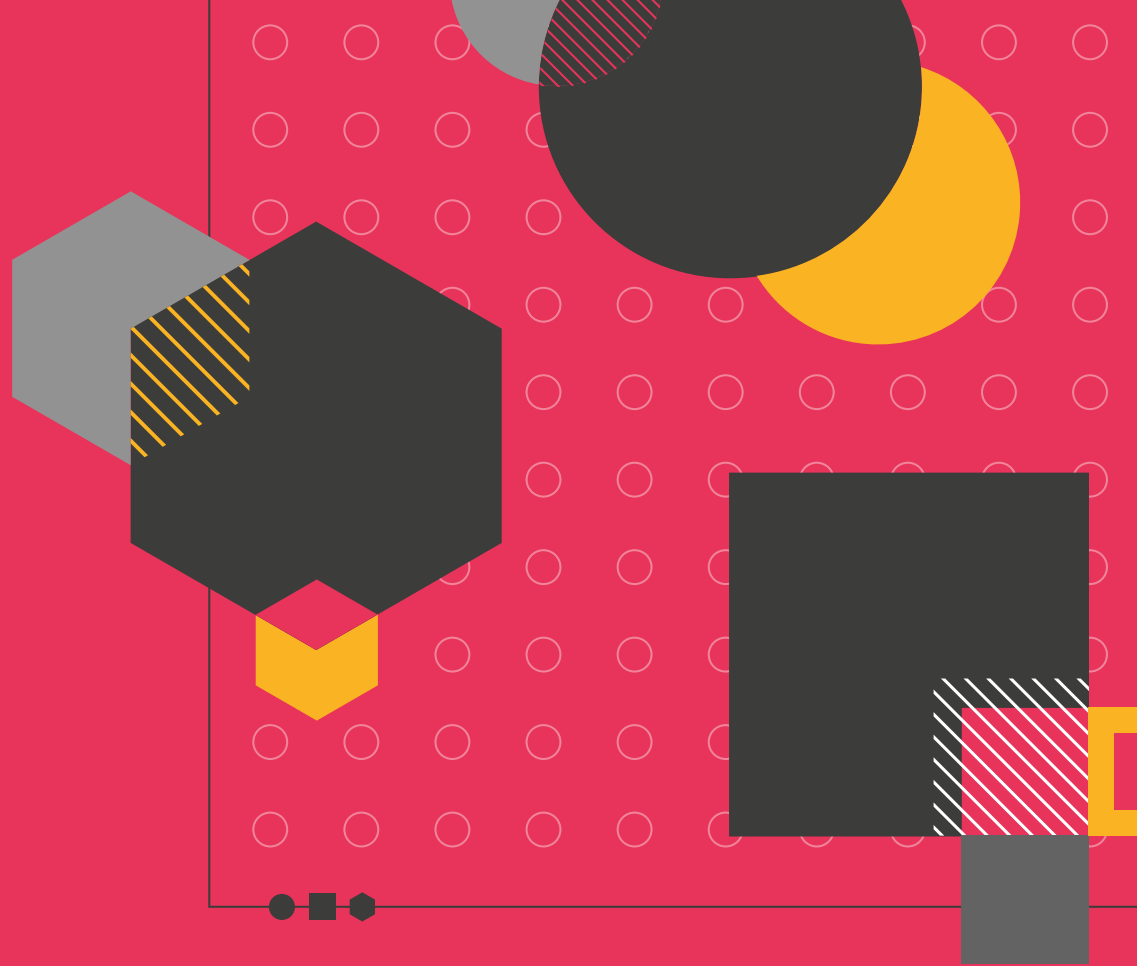




The Future of Work

Thinking beyond: How the pandemic
is rewiring a new world of work



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that works for all

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Creating a Future of Work that works for all

In 2020, the COVID-19 pandemic has seen Australia undertake a national 'work from home' experiment. Workers learned to juggle professional and personal obligations and collaborate with colleagues virtually. Insights from our employees have given us a view of this new world – the way we work has changed and accelerated the future of work.

Re-imagining the future of work is a shared reality within PwC and we know our best future needs to be one that is co-created. Now is our time to lead through growth, including the growth of our people. This starts with developing, inspiring and enabling our valued staff, and I'm excited about this opportunity to bring more inclusive models for work to life.

Recently, PwC crowdsourced rich insights from our 8000+ strong workforce at a Future of Work Jam. The week-long effort proved exactly what is possible when you inspire your people to share their ideas and observations to create a better workplace for everyone.

In this report, we share the results of this survey as well as suggested actions for your consideration, so you can apply them to your organisation and co-create your own future of work. We are already taking positive steps towards making this new world possible – and we invite you to learn, develop and grow alongside us.



Tom Seymour
CEO, PwC Australia

Work is transforming

From the rise of manufacturing in the 18th century to a Fourth Industrial Revolution driven by automation and smart technology, shifts in the workplace have always sparked opportunities and uncertainties.

As we rounded the corner into 2020 the Future of Work was being driven by globalisation and digital adoption. But it turns out the machines weren't taking over the world. Instead, a microscopic invader in the form of the coronavirus had disrupted economies, organisations and the lives of workers, changing the way we work for good.

Alongside Australia's business community, PwC has been living a once-in-a-generation case study, an almost-overnight disruption to established ways of working. It's a moment that offers critical insights into how work will transform in the future.

Thinking differently starts with listening differently

Collectively we'd proven we could dramatically alter the way we got work done, and where we accomplished it. But what parts were better before, what did we discover was broken? And how did our individual efforts impact the workforce as a whole?

We knew PwC's best future had to be one that was co-created. Our transformation journey had to begin with our people, by seeking to understand their challenges, drivers, motivations, needs and wants. That level of understanding requires consultation at scale, and an open and active method of asking, answering and listening.

- We surveyed our people nationwide, with more than **2,700** respondents across all areas of our business.
- We dove deeper on the issues that mattered most through a week-long Future of Work Jam: facilitated crowdsourcing of rich ideas and insights. A gamification experience encouraged high engagement with **4,147** voluntary participants from all of PwC's offices across Australia, and **370** unique ideas. Expert facilitators enabled the testing, iteration and evolution of our hypothesis supported by **25,184** votes and **3,256** idea-shaping comments from our people.

PwC's Future of Work Jam

- We asked for ideas, comments and feedback on a series of 'design challenges'. These included designing the ideal working week and reimagining the workplace of the future
- We created 'thought starters' to inspire team members to think bigger and more broadly about what's possible in the workplace
- We surveyed our team members to understand their attitudes and experiences of working from home during the pandemic, as well as their preferences for the future.



4,000+
individual
contributions



360+
ideas



25,000+
votes



3,200+
comments



49,000
post views



29,600
page views



What have we learnt?



People love the individual flexibility of working remotely; it should be the norm, rather than the exception



But the 'costs of coordination' are mounting, driving 'meeting fatigue' and longer days. **46%** spend more time coordinating, **61%** spend more time in meetings



Differences in home environments are creating unintended inequality



People are struggling to find overlap time to connect, build relationships and collaborate

People want to spend more time on innovation and personal development. **33%** of respondents felt less innovative when working from home.

Some feel they need to be 'seen to be working' for their work to be valued. **33%** believe their career progression would be impacted negatively by remote working

But the road ahead is bright. **51%** say the company's culture has changed for the better and **41%** have a greater sense of purpose. **72%** feel confident about the future of work.

Culture

If 2020 has taught us anything, it's that there's nothing like a crisis to bring people together.

Although social distancing restrictions have meant people have spent much of the year apart, at PwC we've seen a different kind of connectedness emerging. Despite the lack of everyday workplace interactions, our people are feeling more connected to those colleagues they are interacting with regularly – their immediate teams.

This has had a positive impact on people's perceptions of organisational culture, with 51% of our survey respondents saying that culture has improved because of COVID-19 (16% disagree and 33% are neutral). It's worth noting that this perception of an 'improved culture' may also hint at pre-existing personality differences.

Behavioural science suggests that the social contract people have with home revolves around relaxation and belonging. This association can be disturbed when the experiences of the workplace enter the home.



51%

say **culture** has improved
because of COVID-19



Maintaining flexibility is clearly important as we move into the new ways of working and the messaging is clear from leadership that this is important to the firm's culture.”

PwC Director, Sydney



Extending these sentiments to the office poses a new kind of opportunity - one that recognises the ways in which employees' personalities, preferences and domestic contexts inform their relationship to organisational culture along with their satisfaction with working from home. In the future, organisations will be faced with the task of recognising these different streams and integrating them so that employees – no matter their working styles – are empowered to thrive.



Critical question for organisations:

- How do you maintain the cultural benefits and drive a compelling employee experience as organisations turn to increasingly hybrid and dispersed workplace models?
- How can organisations support leaders to drive a compelling and nuanced culture at the team-level while aligning to the broader organisational ambition?

Wellbeing

Working remotely has been a largely enjoyable experience for PwC's team members, with many reporting that they enjoy greater choice and control over their workdays. Employees aren't obligated to commute to a central office and have more time to spend with friends and family.

But this flexibility has come at a cost. For example, the time employees spend co-ordinating their days is increasing, driving meeting fatigue and longer hours. Almost two-thirds of people (61%) say they spend more time in meetings than they did before the pandemic (15% disagree and 24% neutral), and the same amount report their workload has increased. Eight % disagree and 31% didn't have an opinion.

In this new world, people are struggling to find time to connect with clients and colleagues, build ties and collaborate. For example, only 36% of survey respondents highly rated their ability to maintain connections in the workplace. And just 30% were confident in their capacity to nurture their relationships with clients.

After months of working from home, team members feel the implicit pressure to be 'always on.' They are also experiencing blurred boundaries that are eroding their mental health. For example, 32% of team members report a low ability to manage stress.

Thanks to advances in social cognitive neuroscience, we now recognise that humans are fundamentally 'herd animals' who depend on our tribes for connection and reinforcement. But remote working rarely lends itself to spontaneous exchanges with colleagues or opportunities to celebrate collective efforts together - a fact that can seriously influence our sense of belonging and emotional wellbeing.

32%

of team members report a
low ability to manage stress



More incidents of isolation, loneliness and burnout are a consequence of working during the pandemic - and will be a critical consideration for leaders. There's also a growing need for structures that make reward and recognition - led by teams and colleagues - part of everyday culture. Working remotely can also increase anxiousness among employees, who are distanced from the social cues that indicate whether or not their contributions are of value.

Remote working has given rise to certain mental health challenges. But it has also spurred an open discussion about mental health and a growing awareness of the importance of caring for each other and asking for help when required. This represents a step towards positive change. This was proven during the PwC Jam, where a strong proportion of ideas related to mental health and wellbeing and over 10% of all comments addressed this topic. Notably, this was in a professional, public forum where identities were attributed to input - proof that more of us are willing to be vulnerable.

Research finds that humans need to have fun, feel understood by others and experience a sense of hope and optimism about the future (NeuroPower: Leading with Neurointelligence (2013) 3rd Edition). Understanding the ways in which these factors motivate employees - and putting initiatives into place to facilitate this - is key.

Organisations must work hard to communicate expectations clearly and support each employee to manage their own experience. This needs to be part of a wider shift in corporate culture, one that genuinely encourages flexibility and puts employee wellbeing first.



Critical question for organisations:

- How is the role of the leader evolving with regard to wellbeing and what is their duty of care when the line between work and home is blurred?
- How do leaders find the right balance between in-person connection and remote effectiveness, especially with different preferences across individuals and within teams?



Working remotely is great. However, it brings its own challenges in that we are becoming disconnected from our teams physically.”

PwC Manager, Melbourne



Innovation

Innovation is necessary for developing new products and services, improving organisational efficiency, and creating competitive advantage. Our survey reported that although 26% felt more innovative, 33% of respondents felt less innovative when working from home.

These findings are reinforced by *Reworking Work*, a 2020 report by Atlassian, which delves into the global impact of COVID-19 on the workplace. The Atlassian study found that 51% of knowledge workers were attending more pre-organised meetings than before, while 31% were spending less time talking informally with colleagues. This has limited the water cooler conversations and serendipitous encounters that spark new ideas. Overall, 28% of survey respondents said that working remotely has limited the opportunities to collaborate – a shift that has the potential to stifle creativity.

It's become essential to find a way to decrease the amount of time employees spend in structured meetings and increase the opportunities for creative and imaginative thinking. For instance, organisations could factor in short periods of time at the beginning of virtual meetings to invite casual conversation, use virtual collaboration software for idea sessions and work on shared documents online so people can give their contributions substantial thought.



Critical question for organisations:

- Do we provide the capacity for our people to innovate and the skills and infrastructure to enable it?
- How can leaders and team members recreate the unplanned, unstructured and spontaneous interactions from face-to-face work in the virtual realm to unlock and unleash neuro-sparks of innovation?

Part of the issue is that it's all-too-easy to assume that translating offline activities online will give rise to the same quality of collaboration. However, video calls featuring a grid of faces can't ever replace a disruptive and thought-provoking workshop, or the creative camaraderie that unfolds when different minds gather together in the same room. Virtual teams will also need to reset team dynamics for collaboration online – finding a new tolerance for silence and showing greater willingness to speak out and drive discussion. They must also learn to self-manage their energy levels and find ways to critique ideas without eroding their colleagues' psychological safety.

Organisations must nurture strong working relationships, a sense of community and a spirit of collaboration – while addressing the challenges that arise when employees are working at home. We need to reimagine innovation, to approach today's challenge with fresh thinking, not yesterday's answer.



While our tech advances are to be congratulated, I feel I have no time to think differently, innovate and just breathe, as we move from one meeting to the next.”

PwC Director, Sydney

Skills

When the pandemic hit at the beginning of 2020, organisations transitioned to working remotely almost overnight. Unsurprisingly, the use of digital collaboration and communication tools soared. In September 2019, PwC announced a \$US three billion global investment in upskilling the digital literacy of our workforce. That put the organisation in a strong position to weather this transition smoothly when the impacts of COVID-19 struck.

Among PwC employees, 89% feel they have the skills needed to work remotely.

More than half (55%) of our people nominated digital and technology skills as necessary for success in the future of work. Specifically, respondents felt that they needed enhanced technology skills and knowledge in areas such as automation, programming and coding, modelling and data analysis to thrive in a post-pandemic world.

Our survey found that acquiring so-called 'soft skills' – uniquely human capabilities such as leadership, creative thinking, problem solving and conflict resolution – will remain as important as ever as the pandemic reshapes the workforce in the months and years ahead. *The Future of Jobs*, a 2020 report by the World Economic Forum, found that soft skills comprise eight out of the ten most in-demand skills of the future.

We know that soft skills will play a starring role in the workforce of the future – but employees will also be called to use them in virtual and hybrid work environments. Employees, increasingly, will draw on their skill sets in new and complex ways.



Critical question for organisations:

- What are the skills we need to deliver on our future strategy and how do we close the skills gap?
- Is our workforce equipped with the foundations of digital literacy to succeed in a virtual world?
- How do we value and cultivate empathy, learning agility, resilience and other human skills?

For example, 20% of PwC team members ranked interpersonal communication and leadership skills as a major priority as collaborative projects take place via digital tools and virtual settings.

They flagged a clear need for specific initiatives tailored to remote working. These include encouraging informal mentoring, providing more opportunities for formal, structured mentoring and embracing initiatives such as reverse mentoring that rethink the very nature of mentorship. They also suggested programs aimed at maintaining engagement and those that help people maximise existing technologies, so that workers can deepen their abilities over time.

20%

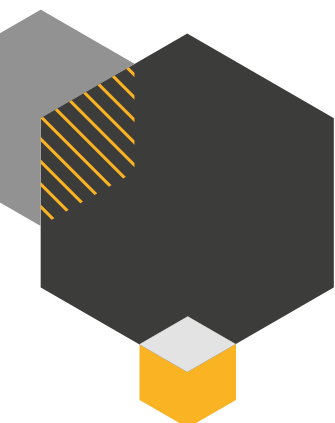
of PwC team members ranked **interpersonal communication and leadership skills** as a major priority



I'd love to see greater emphasis on leadership skills and soft skills across all levels."

PwC Senior Manager, Melbourne

Careers



While our survey found that our people love having more flexibility in their working day, some respondents also expressed concerns about what remote working might mean for their career. A third of respondents feel like their professional development has been inhibited by working away from the office. A similar number (33%) feel their career progression will be negatively affected (47% neutral, 20% disagree).

The survey also highlighted several issues likely to affect employees working away from the office. For instance, in some sections of the business, team members feel they need to be 'seen to be working' for their work to be valued. As a result, they felt managers wouldn't be able to appreciate the full value of their contributions without being physically seen. Overall, 33% of respondents reported believing their career progression would be impacted negatively by remote working (37% neutral, 30% disagree with the statement).

Team members also identified how much professional development and learning is gained from observation, shadowing and informal encounters with colleagues. As a result, many of our team believe the COVID-19 crisis has been particularly challenging for more junior employees who rely heavily on this type of learning.

While these issues will need to be addressed moving forward, we believe people shouldn't underestimate what this ground-breaking remote working experiment has taught us about the way we work.



Critical question for organisations:

- How do we find new ways to compensate for an absence of shadowing, apprenticeship and learning by observation in a hybrid work model – particularly for earlier career workers?
- How do we ensure equal and inclusive recognition in a hybrid work environment, while making sure employees feel needed and valued for their contribution?

Soft skills, such as adaptability, agility, resilience and empathy, have all been imperative during this period and will continue to be vital in the future workplace.

Workers have adapted new practices as a result of this pandemic. They've digitally upskilled, embraced virtual ways of working and have been incredibly resilient. But by being caught in survival mode, they haven't always reflected on just how far they've come. And because virtual communication involves fewer social cues, it can be challenging to gauge this sense of progress.

This is a powerful opportunity for leaders to act as a coach for employees by providing ongoing feedback and carving out space for reflection, while recognising the significant progress afforded through adaptive work practices.



My concern would be for the younger members of the team who need lots of coaching – there is a risk that they are more 'out of sight, out of mind' for experienced team members."

PwC Partner, Melbourne

Workplaces & spaces


There are many advantages to working remotely – from the time saved not sitting in traffic to the money saved by foregoing a daily takeaway coffee. But it hasn't been plain sailing for everyone, for a variety of practical and personal reasons. These range from not having a suitable office space at home to the pressures of juggling family commitments with work.

To find out how our employees would like to work in the future, we asked our team members to consider eight potential workplace models – each with unique features and trade-offs.

These workplace models fell into four groups (see Figure 1). They included a traditional office-based model (under which all individuals and team tasks, innovation and collaboration would take place). They also included several hybrid models featuring a mix of remote work for individual tasks and office space for specific tasks, and a remote-only model, with no physical office space.

During the Jam, our people told us there's no one-size-fits-all workplace to suit everyone and that there's no going back to our pre-COVID model.

Figure 1: We asked our people to consider these potential workplace models.

	Traditional Office	Office 'Hubs' / 'Spokes'		Functionally focused office			Remote	
Model	 Office Central	 Collab. Spokes	 Extended Home Hubs	 Digital Axis	 Community Centre	 Innovation Campus	 Remote First	 Remote Only
Work location and purpose(s)	Pre-COVID-19 model Office / client site primarily for all individual & team tasks; innovation, relationships with remote work by exception only	Remote work primarily for individual tasks including people management & mentorship with central office 'hubs' and smaller 'spokes' used for collaboration purposes: collaboration, innovation and meeting with clients	Remote work primarily for individual tasks - carried out at home or 'home away from home' office 'spokes' at discretion of teams while office 'hub' used only for teaming / large scale collaborations, client relationships and events	Home remote work for individual tasks, day-to-day client interactions and team collaboration, office used specifically for digital capability uplift purposes including training, tooling, development with people and clients	Home remote work for individual tasks, day-to-day client interactions and team collaboration incl. training & development, office used primarily for people connectivity / social connection including client relationship development & events	Home remote work for individual tasks, day-to-day client interactions and team collaboration, office used specifically for innovation, thought leadership and scale product/ service ideation through development	Home remote or co-working spaces used as default for most purposes, office used by exception for large scale client events, training, innovation or for specific access to data / capabilities.	Home (remote) for all work - no physical offices
Leading benefits	<ul style="list-style-type: none">• Consistency• Teaming• Apprenticeship	<ul style="list-style-type: none">• Access• Collaboration	<ul style="list-style-type: none">• Access• Flexibility	<ul style="list-style-type: none">• Flexibility• Digital	<ul style="list-style-type: none">• Relationships (Client)• Connectedness• Relationships (People)	<ul style="list-style-type: none">• Thought leadership• Innovation	<ul style="list-style-type: none">• Access• Flexibility	<ul style="list-style-type: none">• Access• Flexibility
Location decider	1.Business and clients 2.Team 3.Individual	1.Team with individual input 2.Client	1.Individual 2.Team with client input	1.Client and individual	1.Team and client 2.Individual	1.Team 2.Individual	1.Individual with team input 2.Client	1.Individual
Net score	-136	60	80	-29	235	20	130	-82

Instead, most people want a 'Community Centre' model in which work is mainly performed remotely, with office space available for dedicated purposes.

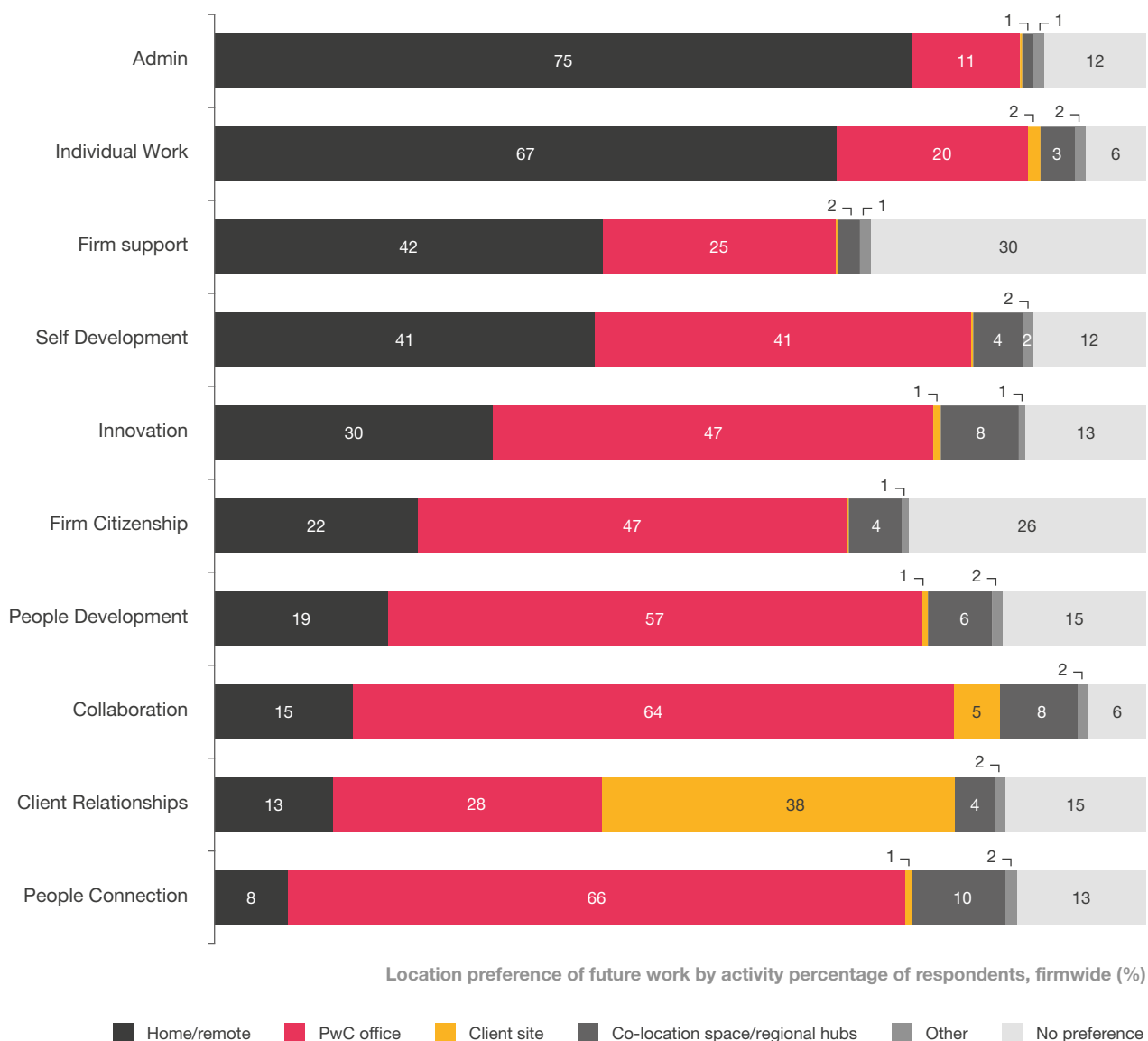
This model favours remote working for individual tasks. Meanwhile, the office is mostly used for people-related activities such as the development of client relationships and events.

The survey also showed that people would prefer to do specific types of tasks – including administrative work, individual work such as research and analysis, and self-development – at home, while using the office to collaborate and connect with colleagues and clients (see Figure 2).

For example, 75% of PwC team members told us they would prefer to perform administrative work remotely, while 67% said they would prefer to carry out individual tasks at home. On the other hand, 66% of respondents would prefer to connect with people at a physical workplace.

While these preferences are largely consistent, there is still a significant variation in the amount of time that people like to spend in the office. This highlights that different workers have different perspectives and needs.

Figure 2: Preferred location of future work, by activity



With fewer people going into offices daily, teams are also likely to use office space differently. Not only will many organisations need a smaller real estate footprint, but we're likely to see fewer individual workspaces and more rooms for meeting with colleagues and collaborating. These will be configured with video conferencing tools to allow remote team members to easily join in.



Critical question for organisations:

- How do we retain individual flexibility whilst achieving team success?
- How do you ensure consistency in your team's ability to connect and network when people are both working remotely and in the office?
- How do you enable collaboration within teams, across teams and with clients when people have different expectations of what this involves?
- How do you provide clarity on when it is required to be in the office – ensuring that decision-making about this is fair and equitable?



We need a hybrid of formal and informal spaces... Interior and ambiance play a key role in a person's productivity... making people more relaxed and able to come up with amazing ideas to solve client issues. Creative solutions come in an informal environment rather than just a formal environment.

PwC Senior Associate, Adelaide



Plotting a path forward

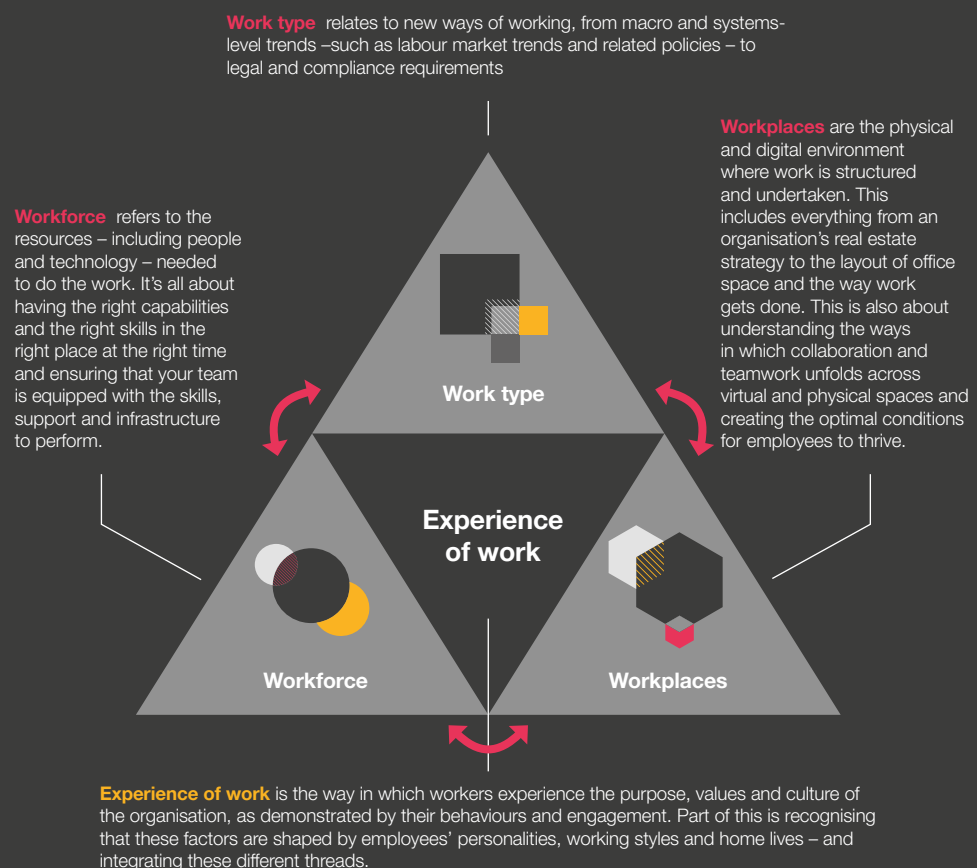
As the COVID-19 crisis evolves, we are still facing a high level of uncertainty about what the future of work looks like. Australia's remote working experiment has shown organisations and employees exactly what's possible. It's given rise to a shift in employee behaviours – as well as sweeping changes to the ways in which we relate to work and each other. And, now, there's no going back.

But giving rise to the transformation that is needed calls for complete commitment, a focus on innovation rather than iteration. The future of work is complex but we can't afford to think about the defining issues in a piecemeal manner. Rather than adding expectations, we need to let go of the old ideas that defined the workplace.

From our attachment to the 9-5 work week to the presence of organisational hierarchies and the notion of the employee-for-life model, our ability to move forward hinges on our willingness to unlearn. The future of work can feel out of our control but it is important to glean the learnings presented by this moment and draw a clear line in the sand.

Work has fundamentally changed forever. And for organisations, this means going back to basics – revisiting the organisational ambition and what work needs to get done, how it gets done, and then the people, processes, and infrastructure that are needed to deliver. It's about understanding precisely what is changing and the steps your business can take to evolve.

Figure 3: PwC frames the future of work around work type, workforce and workplace. The experience of work is at its core



For organisations looking to embrace the future of work, we recommend the following steps:

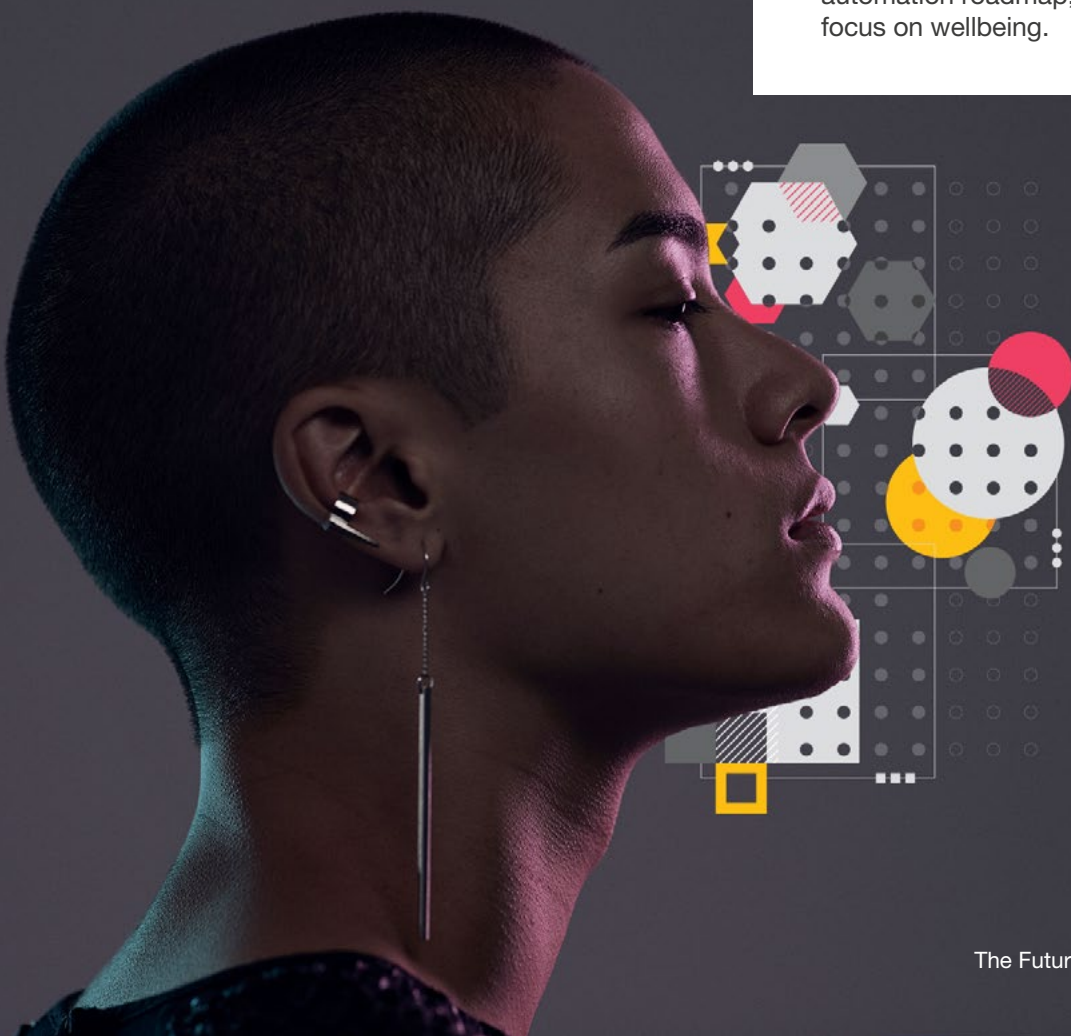
1. Think critically about your ambition and involve your people in this vision

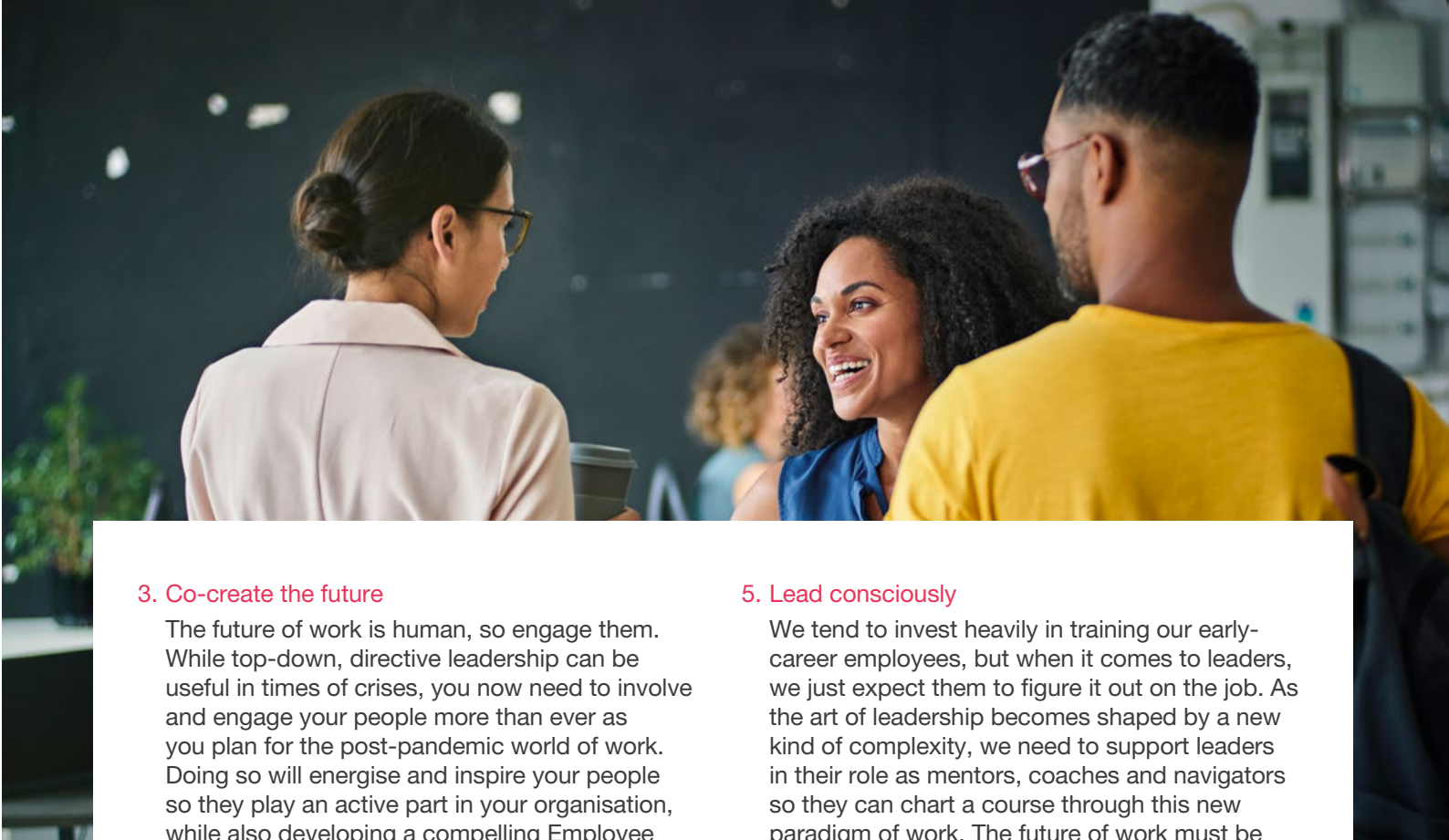
COVID-19 has caused significant market disruption, seeing organisations reconsider their strategy in light of the new world order. Now is the time to use the great pause as an opportunity to reflect on where your business is heading and how this might shift in the future. This means embedding flexibility in your approach. To do this, you need to plan for multiple plausible future states, or scenarios, so that you're prepared to tackle an uncertain future. When doing this, you need to answer questions like "what do we want to be known for?" and "what might cause us to change course?". Have these conversations with your people and customers, communicate transparently, and let your employees know their role in achieving this ambition – firmly reinforcing the value they bring.

2. Redefine what work is and how it gets done

Once you've mapped out the course of where you're heading, it's about redefining the work that needs to get done that will get you there. This includes the sort of people and technology you need and how the work gets done. Consider the impact this new definition of work has on the types of workers you need, and the size and skills of your workforce. It's not easy. It means being clear on what is core to your organisation, and what can or should be automated, offshored, and outsourced. It also means thinking about where work gets done. In the new world of work, we need to say goodbye to the notion of a single workplace. Good work can be carried out in different ways across multiple workplaces—particularly for knowledge workers, where work gets done through technology (i.e. a laptop) rather than a physical space. Getting clear on your definition of work is the first step towards nurturing the motivation, performance and engagement levels of your people.

In the short term, this might mean providing more formal support for employees to establish workspaces outside of the office and investing in digital upskilling to support remote ways of working. In the long-term, this could involve embracing hybrid working models, reducing your physical footprint, and/or developing an automation roadmap, all the while maintaining a focus on wellbeing.





3. Co-create the future

The future of work is human, so engage them. While top-down, directive leadership can be useful in times of crises, you now need to involve and engage your people more than ever as you plan for the post-pandemic world of work. Doing so will energise and inspire your people so they play an active part in your organisation, while also developing a compelling Employee Value Proposition for what will continue to be a competitive and transient labour market.

When co-creating initiatives with your workforce, think about how you can maximise participation and mobilise creativity. It can't just be another survey. Think about a virtual stakeholder engagement exercise such as a Jam. At PwC, our People Council also reflects our organisation's spectrum of voices and perspectives. Getting these insights from your employees and understanding the factors that drive things like their performance and wellbeing will see you build a people-centric future of work that supports everyone to thrive.

4. Don't be afraid to adopt a 'test and learn' mindset

We are at a crossroads. And when faced with change, we tend to live in a state of 'flight-or-fight'. We can either go back to the way things were, and what is comfortable, or use this opportunity to innovate and iterate, and define a new path. Now is the time to be brave. Now is the time to make a conscious decision to embrace experimentation. It's vital to test, learn and experiment – and be prepared to act on your findings. But it doesn't just happen. It requires you to make some deliberate decisions and actions. These include blocking out the time for individuals and teams to be creative amongst all the noise, crowdsource ideas, and incentivise innovation. While the pandemic-induced environment has led to a low risk threshold, we need to be pushing the boundaries now more than ever, creating safe-to-fail spaces and celebrating failure- or better yet, redefining failure altogether.

5. Lead consciously

We tend to invest heavily in training our early-career employees, but when it comes to leaders, we just expect them to figure it out on the job. As the art of leadership becomes shaped by a new kind of complexity, we need to support leaders in their role as mentors, coaches and navigators so they can chart a course through this new paradigm of work. The future of work must be leadership-led, and leadership-lived.

The future of work is also about teams. It is about the collective efforts of individuals coming together rather than singular achievements. And leaders play a crucial role in sustaining these communal bonds. Ensuring that your people feel needed and have a sense of belonging will be a defining focus for leaders moving forward. Also think about how you can move towards team-based performance metrics, as well as maintain a nuanced focus on nurturing culture at the team level rather than relying on a one-size-fits-all organisational view.

Ultimately, the future of work isn't just about the physical walls of an office. It's about employees' connection to their work and each other and how collaboration and creativity can flourish in offline and online contexts. And to do this, you need to rethink your ambition, redefine work, engage your people, experiment, and invest in leadership.

The opportunity for Australian business now is to co-create a future of work that works for all.

Contacts

For more information about the research in this paper, or to talk about how we can help you to replicate our Future of Work co-creation process, contact us.



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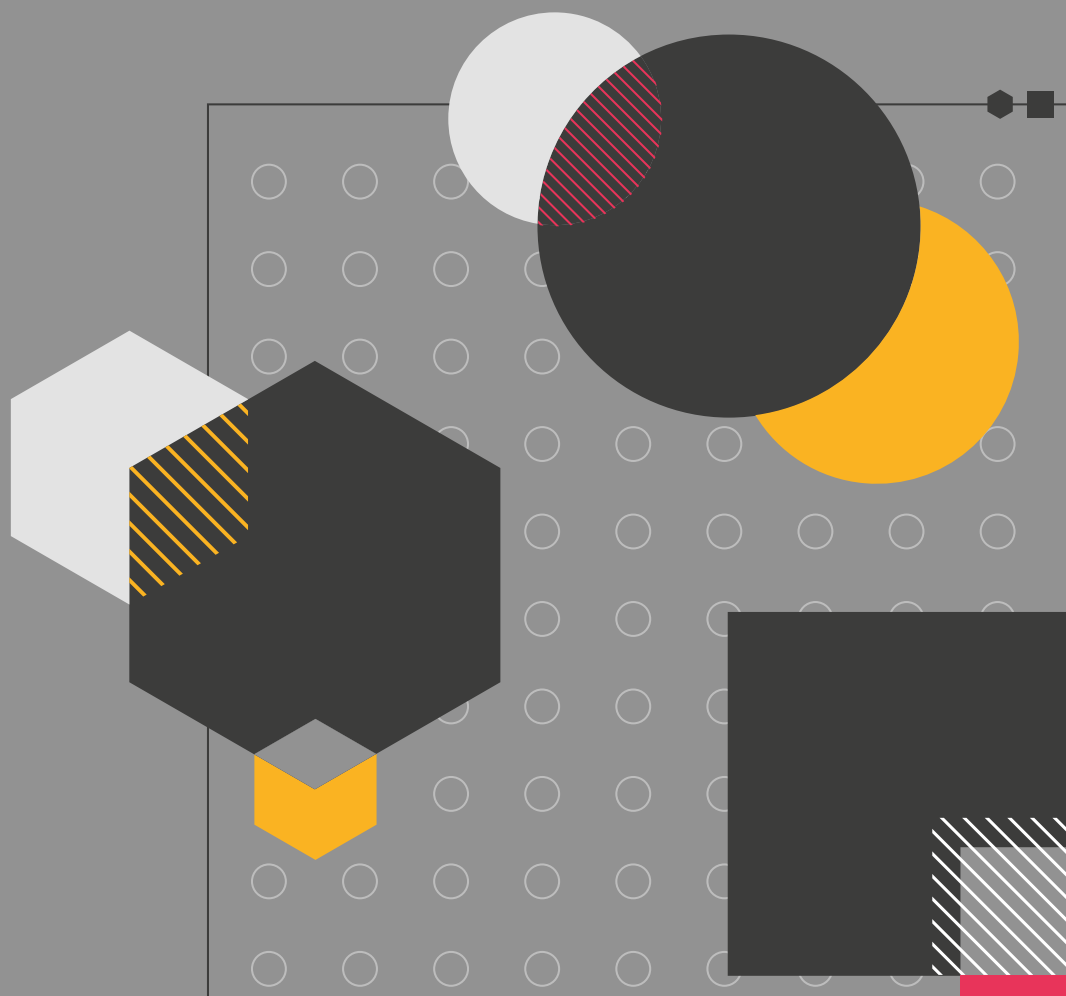
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The Future of Work



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