



EST10 Survey Report.

2020/2021



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*Daisy - A symbol of purity
and innocence, representing
transformation and renewal.
Closing in the night and opening
with the sun.*

”





Contents

Executive Summary	5
Key Findings From 2020	6
Market Insights	8
The Survey Results....	11
Whom We Asked	12
Current Employment Status	14
Working From Home	17
Working Habits	20
Values- What Is Important?	22
Mental Health	24
Key Takeaways..	26



Executive Summary



The past 12 months have seen extensive changes in the way we work.

To help understand how expectations and values have changed from pre-COVID to now, we have conducted a series of surveys.

The first survey report released in September 2020 explored the immediate implications of COVID-19. Now, we look to see how we are emerging and recovering.

Our wide network of clients and candidates completed our survey. From there, we gathered a broad range of opinions on how people are feeling right now and what the future workplace looks like.

Planning the survey, we thought

carefully about the practices and habits emerging. Asking questions around work hours, location, lifestyle choices, values, and importantly, health and wellbeing were crucial.

We will provide the key themes that have emerged from the survey and insights from our data.

We hope our information will assist you with your workforce planning, recruitment and retention strategies.

A handwritten signature in black ink that reads "Roxanne". The script is fluid and cursive.

Roxanne Calder
Managing Director

Key Findings From 2020

We thought it worthwhile to recap the pertinent findings from our survey in September 2020.

Most notable was whilst 77% of respondents were happy with their current role, 54% still stated they would leave their job if presented with a new opportunity.



of people would leave their current role

In contrast, when asked what people considered most important, job security and time with family came out on top. We found these results intriguing, leading us to believe that employees, whilst 'happy'; may be

seeking more and that changing jobs did not correlate to reduced job security.

Work location was another 'hot' topic.



of people continued working from the office

Our findings showed that only 27% of people were working from the office. The majority were either working from home or a hybrid of home and the office.

Unsurprisingly, over the 6 months from March to August, perspectives shifted, and family, company culture, values, and lifestyle became the main focus.



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Market Insights

In the coming pages, we share some of our expert insights into the market.

Economy

Despite an overall fall in GDP of 1.1% for the year, figures from the last quarter are positive. The economy rose by 3.1%. This is the first time in more than 60 years that GDP has grown by over 3% in two consecutive quarters¹.

The OECD (Organisation for Economic Co-operation and Development) is forecasting growth for 2021 to be at 4.5%. It is expected global GDP will surpass pre-pandemic levels before the end of the year².

Employment

Unemployment and underemployment rates are essential indicators of the actual progress of economic recovery.

Unemployment is defined as someone who 'is not employed for one hour or more, is actively seeking work, and is currently available for work³'. Underemployment refers to individuals who would prefer or are available for more hours⁴.

Recent figures show a decrease in the unemployment rate to 5.6%, a figure remarkably low. Whilst an unemployment rate at this level is a strong economic indicator; it also signifies vital issues for employers with hiring key to their future growth strategies.

1. <https://www.abs.gov.au/media-centre/media-releases/economic-activity-increased-31-december-quarter>

2. <https://www.afr.com/politics/federal/oecd-ups-australia-s-growth-to-4-5pc-20210309-p57909>

3. https://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/MSB/feature/FeatureUnemployment#:~:text=The%20Australian%20Bureau%20of%20Statistics,count%20of%20all%20these%20people.



The underemployment rate has decreased to 7.9%, a figure 0.9% lower than 1-year ago⁵.

Unemployment rates for those under 35 are high sitting at 8.5% compared to a rate of 4.2% for those 35 and above.

The 'job maker' scheme targeted at encouraging businesses to employ under 35s, which was expected to create 450,000 jobs, has delivered only 609⁶ new jobs.

The permanent market

Hiring permanent employees essentially came to a halt from around March to September last year. Since December 2020, the market has improved significantly in comparison and has remained consistent with its job vacancies.

Whilst more jobs are available, there is insufficient availability of suitable candidates to meet the demand.

Talented candidates are reluctant to leave roles and companies that have been loyal to them through COVID. Further impacting the talent pipeline is the focus on family commitments and thus working part-time hours or not at all.

It is clear, no matter what the preference is for working arrangements, candidates want more choice, and flexibility. Our Survey's data shows the same trend.

Flexibility and the power to choose is the main conclusion and the difference emerging from COVID-19.

4. <https://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/6102.0.55.001~Feb%202018~Main%20Features~Underutilised%20Labour~7>
5. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia/mar-2021>
6. <https://www.afr.com/policy/economy/jobmaker-could-be-scaled-back-in-budget-20210324-p57dlr>

The temporary market

Temporary jobs available over the last few months have also increased. Whilst not yet back to 'pre-COVID' levels, the need and optimism are there!

The shortage of candidates within the temporary space is even more pronounced. In addition to the challenges outlined in the permanent market above, many short-term temporary candidates are on Working Holiday Visas (WHV). A great majority of these candidates have returned home, and we have no new WHV candidates entering Australia.

With this tight candidate market in mind, 'getting it right' with your offering will help secure talent for your business.

Making the right decisions at this time, about work arrangements and their impact on productivity, or better manageability of employees; or creating new policies, looking at the implications for inclusion, are all necessary. We hope the data assists you with making these decisions.



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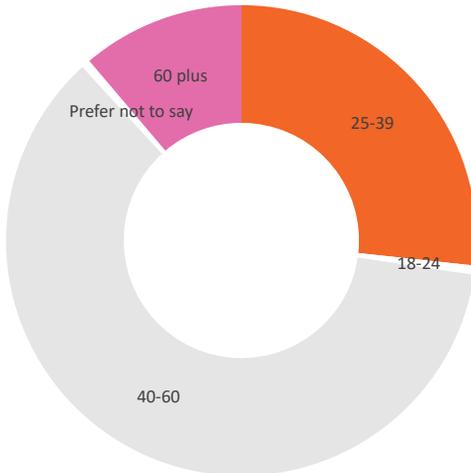
The Survey Results....

Whom We Asked

We distributed our survey to our wide variety of clients, candidates and contacts and shared it on our social media platforms.

We collected demographic information from respondents, asking for details of age, gender, and position.

Which age bracket do you fall into?



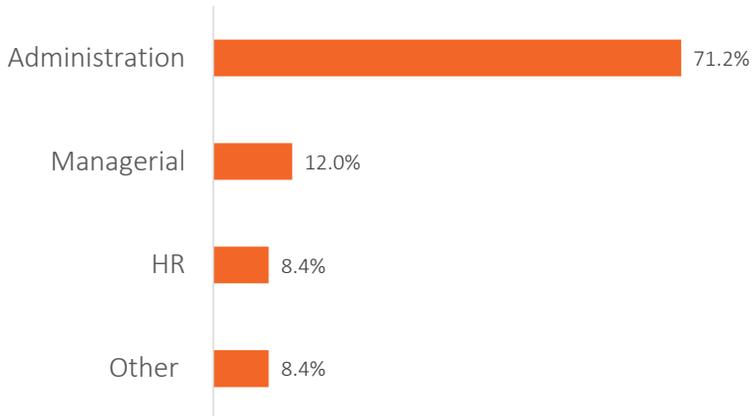
Most respondents were in the 40-60 age bracket

What is your gender?



9 out of 10 respondents were female

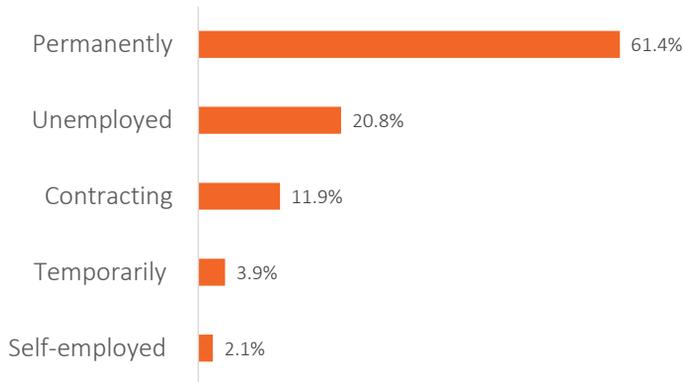
Which category does your role fall into?



Current Employment Status

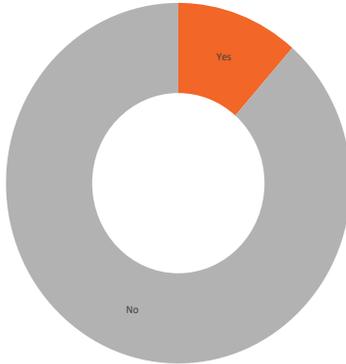
We asked if people were employed or job seekers, and if employed, in what capacity, i.e., hours worked, full-time or part-time. We also wanted to know how satisfied and happy people are with their jobs.

What is your employment status?



Most respondents were permanently employed

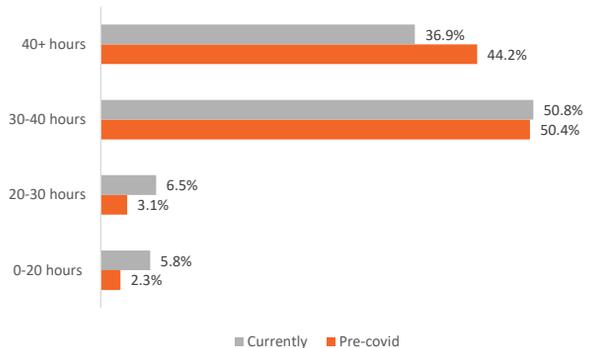
Are you currently working reduced hours?



11.5% of respondents are currently working reduced hours

On average, how many hours do you currently work per week?

Fewer people are working 40+ hours now compared to 'pre-COVID'



Are you happy in your current job?



66% of people are happy in their current job

If you were presented with a new job, would you leave your current role?



65% would leave their current role if presented with a new opportunity

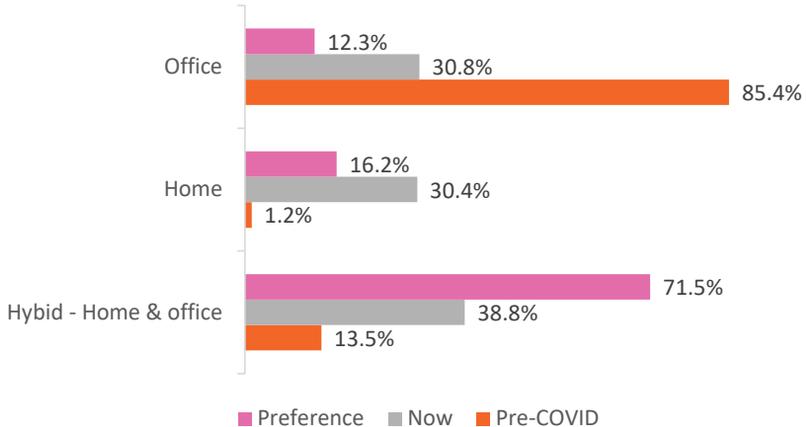
Working From Home



Working from home is one of the critical topics to emerge from COVID. It is essential to include this to understand the impact of COVID on work from home trends and preferences.

Questions we asked include work location before COVID and now, preferred work location and the benefits or drawbacks of working remotely.

Where would you prefer to work?



Overwhelmingly respondents would prefer to work from home

Benefits of working from home

Has working from home enabled you to integrate a healthier lifestyle?



Do you think you were/are more productive when working from home?



On average, how much time did you spend exercising per week before COVID-19 and now?



How much quality time did you spend with your family before COVID-19 and now?



Costs of working from home

Have you incurred any additional costs due to working from home?

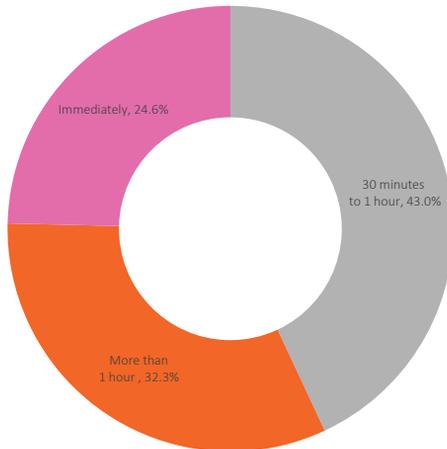


Working Habits

Conducting this survey, we were interested to understand more about people's working habits, including hours worked and potentially working beyond 'normal hours'.

With flexibility as a priority, are traditional working hours of 8am/9am to 5pm/6pm lost?

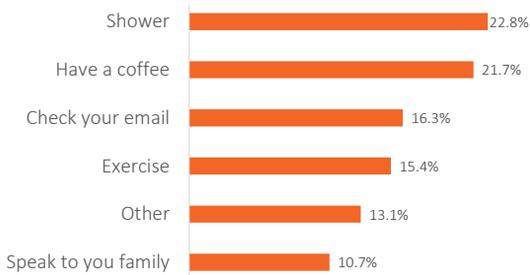
How soon after you wake up do you check your emails?



67.6% of respondents check their email within 1 hour of waking up



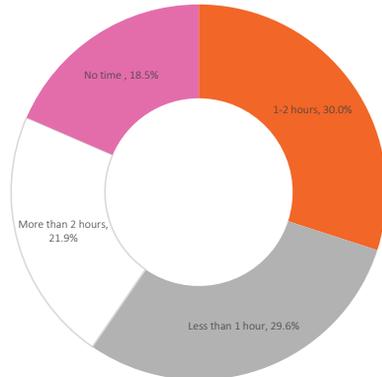
What do you do first in the morning?



Checking email is the 3rd most common thing people do first thing in the morning

On average, how much time per day are you spending working outside of your 'normal' office hours? – i.e. checking emails or logging in

Most people spend additional time working beyond their 'normal hours'



Values - What's Important?

Values have shifted over the past 12 months. What was considered important before COVID has shifted and are much lower on people's priority list. Consideration of these is essential in hiring and retaining employees.

Which of the following was most important to your way of life before COVID-19 and now?

Top 3 most important

Pre-Covid

Now



Work-life balance



Work-life balance



Salary



Job security



Job security



Flexibility to work from home

Which of the following was least important to your way of life before COVID-19 and now?

Top 3 least important

Pre-Covid

Now



The brand you work for



The brand you work for



Flexibility to work from home



Career advancement



Career advancement

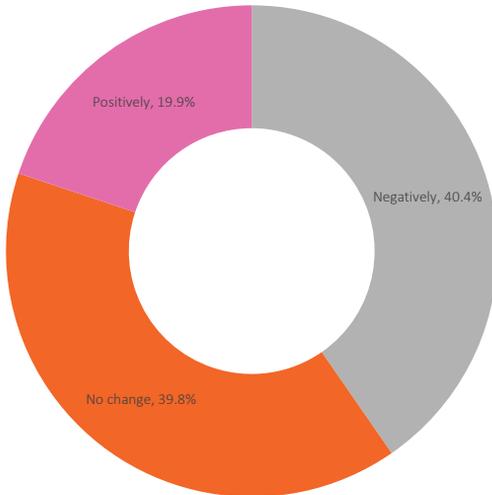


Professional development

Mental Health

The global pandemic has significantly impacted mental health – isolation, job loss, health concerns have all contributed. Supporting employee’s mental health is a must for all companies.

How have the last 12 months affected your mental health?



40.4% of people said the last 12 months has negatively affected their mental health



What measures has your organisation put in place over the past 12 months to support your mental health?

Constant check-ins through various formats

Weekly health team meetings and regular check-ins

EAP (Employee Assistance Program) and weekly check-ins via zoom where we don't discuss work just talk and have a background theme that changes each week

Online employee assistance programs and access to specialist help if needed

Sending box of appreciation

Webinars and access to EAP

Meditation, yoga, tai-chi, art therapy, strength training, boxing, and others delivered online

Wellbeing month with focused social, physical & mental health activities

Regular zoom catch ups and counselling services

Wellness Calendar, promoting EAP, etc

Wellbeing day once a quarter for mental health breaks

Very good mental health programme as well as wellness programme

Work where works for you

1-on-1 phone calls & check-ins from senior managers

Flexibility to work from the office or home

Extra paid leave over Christmas

Key Takeaways..

- » Flexibility for individuals to choose where to work from is extremely important
- » Over 65% of people would leave their current role. Ensuring the environment, salary, and work-life balance are aligned can help retain employees
- » Work-life balance was and continues to be a top priority, facilitating increased productivity, healthier lifestyle and more opportunity to spend time with family
- » Mental health needs to be addressed especially in a work environment that is 100% based from home
- » Consider additional costs that may be required when working from home - desk/office set up, utility bills, stationery supplies

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*The flower that follows
the sun does so even
on cloudy days.*

Robert Leighton

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Contact Us

Level 10, 66 Hunter Street, Sydney, NSW 2000

t 02 9002 0222

e info@est10.com.au

www.est10.com.au



www.facebook.com/EST10/



www.linkedin.com/company/est10



[@est10recruitment](https://www.instagram.com/est10recruitment)