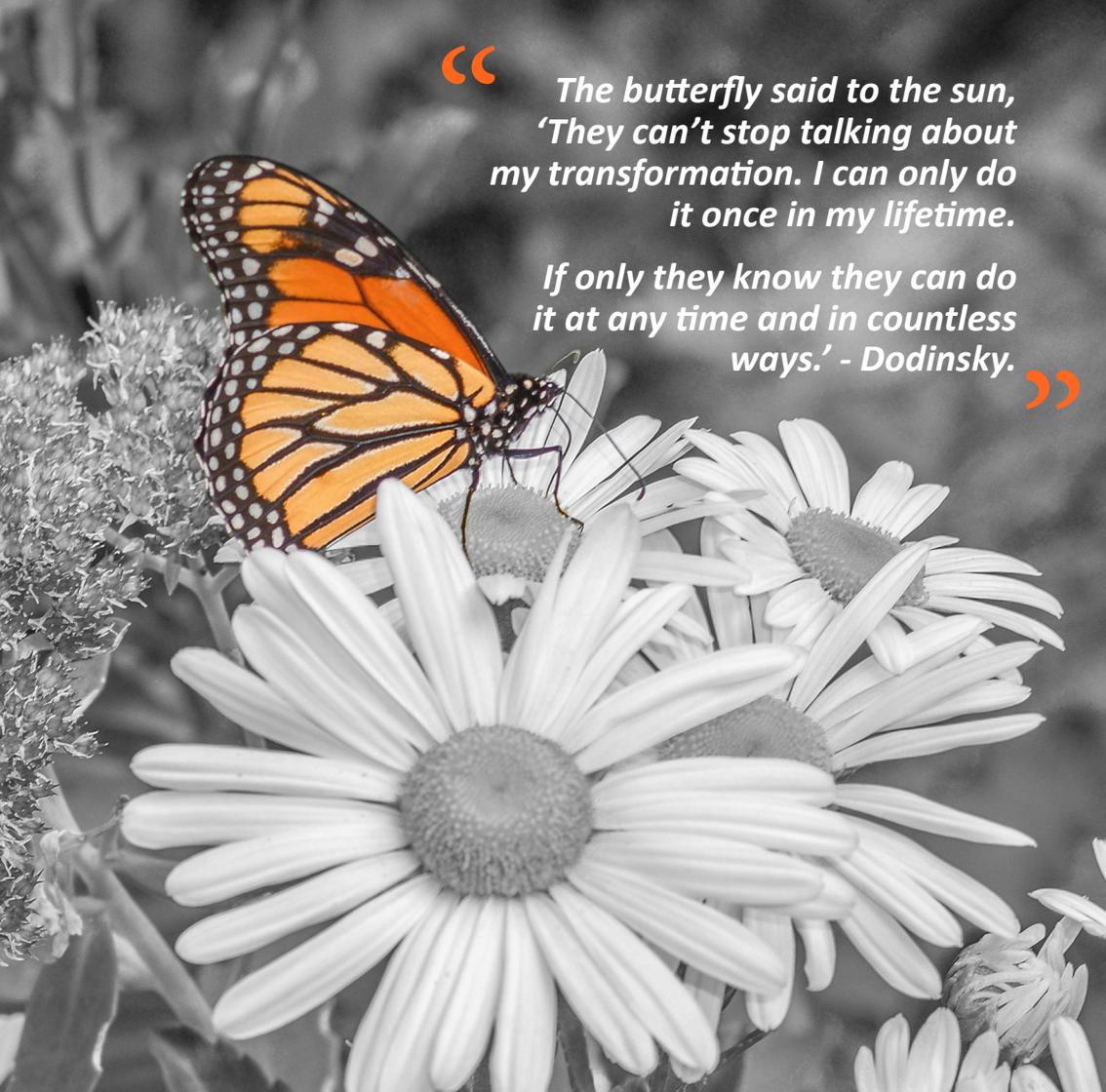


EST10 Survey Report.
October 2021





“ *The butterfly said to the sun,
‘They can’t stop talking about
my transformation. I can only do
it once in my lifetime.*

*If only they know they can do
it at any time and in countless
ways.’ - Dodinsky.* ”



Contents

The Monarch Butterfly	4
Executive Summary	6
Key Findings From 2021	8
Market Insights	10
The Survey Results...	15
Whom We Asked	16
Current Employment Status	18
Working From Home	21
Working Habits	25
Lifestyle	30
Values — What Is Important?	33
Key Takeaways...	36

The Monarch Butterfly

We chose the Monarch butterfly for the theme of our survey, symbolising transformation, strength, endurance, resilience, and hope. The symbolism comes from the long migration journeys taken by the Monarch (up to 3,000 miles) to survive.

The Monarch butterfly is also the only butterfly who makes the return journey home. We felt it relates to our own journey, through lockdowns, restrictions, job losses, insecurities, mental health issues, to a 'return home' to the freedom we all crave.

Butterflies have been an inspiration throughout history for many people, including artists and writers, for their fragile beauty and strength. The famous Russian American writer Vladimir Nabokov once said,

'Literature and butterflies are the two sweetest passions known to man.'

As we enter the spring season, we already feel different with all the events that have shaped our lives. No matter how we handled COVID, we have all been impacted in some way. It may be directly or from witnessing our friends, children, colleagues, and loved ones deal with the effects brought about through COVID.

Our survey reveals, nearly 20% of you have relocated in the last 18 months, and 42% of you feel COVID has changed your working life habits for the better.

Despite not having control over many of these events, we are all regaining hope for the future.



Executive Summary

The past 18 months have been the most unpredictable and challenging of my working life. I am sure many of you feel the same. Never could we have predicted the pandemic nor the subsequent Delta strain and lockdowns for 2021.

Our first survey, launched in September 2020, explored the immediate implications of COVID. The second survey, in April 2021, showed how we were emerging, recovering, and adapting. Our third survey for October 2021 focuses on how we are dealing with the Delta variant and the ensuing long-term lockdowns.

I am not sure any of us thought we would be back in the same situation as we were last year, and maybe that is why we feel so different. Our survey shows 69.7% of respondents find this

current lockdown more stressful. This was a slight surprise for me as our job losses have not been as severe as our first lockdowns in 2020, and of those surveyed, 94.6% are employed.

Perhaps the shock, revelation and reality of life living with a pandemic? Maybe our resistance is lower this time as we move away from our subconscious denial? Research by the University of London noted, 'employees are now finding the impact of working at peak level has taken its toll and that the emotional and physical 'fuel' is low'. Effectively, many of us are 'running on empty'¹.

It might be timely to consider what our workforce has really been through. The researcher likens the psychological experience to stages of the Kubler-Ross grief model; denial,

anger, frustration, bargaining and, finally, acceptance.

For these reasons, we feel the results of this survey to be critical in understanding and uncovering how people are feeling and dealing with the current conditions, as well as recognising the different stages of loss. The survey also highlights what is now vital to people and their expectations of the workplace moving forward.

A wide network of clients and candidates completed our survey. When planning our surveys, we carefully consider the practices, behaviours and habits emerging. We hope our information will assist you as we transition to a new working design and norm.



Roxanne

Roxanne Calder
Managing Director

6 ¹. <https://www.internationalsos.com/insights/psychological-impacts-of-life-in-the-second-half-of-the-covid19-pandemic>

Key Findings From 2021

We thought it beneficial to summarise the key findings from our October 2021 survey.

Most notable was that 94.3% believe businesses should allow working from home (WFH) as an option moving forward. 48.1% said it's for their mental health, while 42.7% stated it as their right to choose. An important finding to consider when transitioning back to the office.

94%

of respondents believe businesses should allow WFH

Interestingly, 75.7% of those surveyed are happy with their current job, but 50.9% still stated they would leave if

presented with a better paying job. This is similar result to our last survey in April 2021, with 77% satisfied in their roles and 54% would have considered leaving their role.

81%

of people prefer a hybrid working model

Of course, WFH is a hot topic, with 80.5% saying they preferred a hybrid working model. Yet, if presented with a better paying, strictly office-based job, 49.7% would consider it.

It appears overall that our lifestyle has improved and yet a great majority surveyed, 69.7% find this current lockdown to be more stressful.



Market Insights



In the coming pages, we share our expert insights on the current state of the employment market. In conjunction with the survey results, we hope this information will assist in guiding your recruitment strategies.

Australia finds itself in an interesting situation. At the start of 2021, we saw a quick market and economic recovery and all economic indicators predict an even more substantial rebound for 2022, with a growth rate of 4.5% expected².

Whilst delighting in the strength of our economy, at the beginning of this year, one constraint, unexpected by many businesses, was the difficulty in sourcing and hiring talent. Australia has been suffering from a candidate shortage for some time now, long

before COVID. As professionals in this space, our business has written and reported on this issue for many years.

Many factors contribute to this, not the least being our ageing population and low replacement birth rates. COVID exasperated the situation, highlighting further our talent constrictions. Thus, migration has all but halted, and the changing attitudes of our workforce, brought about by the impacts of COVID, has resulted in our pool of talent shrinking further. In addressing the skills gap, businesses are looking to upskill and reskill their existing workforce.

Australia's latest unemployment figures sit at 4.5%, a twelve-year low³. Our underemployment rate is at 9.3%, an entire point increase from the previous month. This is an

accurate indicator of our employment landscape. The underemployment rate considers those employed but not working at full capacity, i.e., reduced hours or working but not fully utilising their skills.

According to a recent article in the AFR, the situation is expected to worsen, with AMP tipping a further fall in employment of 150,000 and another sharp decrease in hours with the full impact from Victoria's lockdown coming into play⁴.

In addition, the youth unemployment rate has increased 0.5 points to 10.7%. This is a concerning figure, especially as it is 0.9 points higher than March 2020 figures³.

The permanent market

Despite the lockdowns, hiring has continued, albeit at a reduced rate. It is vastly different to last year's lockdown experience, where recruitment within our administration space ground to a halt.

Despite the ease with which we have switched to working from home this time around, onboarding and training remotely is a significant challenge for businesses. This gives us cause to believe an increase in job vacancies is to be expected as soon as our lockdowns are over.

As such, we are predicting the competition for talent to be even tougher. Traditionally, the Christmas and New Year period is a slower time of year for hiring; however, this

year, we suspect businesses will take advantage of the downtime to be ahead. It is also something we are strongly advocating!

In January this year, we saw a similar situation with strong job vacancy listings up compared to previous years.

Upskilling

Further, we notice a redesign of traditional job roles and tasks in accordance with specific business needs. There is no uniform approach to what a perfect solution would be from one role to another and even from one employee to another.

In some cases, with little time for formal training, skills are being acquired on the job, ‘as you go’. We have seen this especially so within the administration space, where savvy

administrators are putting their hands up and stepping into more senior positions, learning, and adapting very quickly on the job. Circumnavigating and adaptability have become the new ‘it’ skills.

In such a competitive market, salaries have also increased, and in some cases, by 20%. According to our survey, 49.1% of people have received salary increases in the last 12 months. We have also seen strong counter offers and sign-on bonuses offered to new starters.

Changing workplace environment

We have witnessed a shift in control over who decides and chooses the place of work. It started subtly from last year; however, our most recent lockdowns have put this firmly into overdrive. Our survey shows 94.3% of people believe all businesses should

allow WFH as an option, and 42.7% believe it’s their right to choose. It seems we are entering a more fluid and less structured working environment.

Every industry will have its own ‘trends’; what is suitable for some might not be ideal for another. This kind of ‘segmentation’ calls for more flexibility and requires an equally flexible workforce to make things happen. Needless to say, the ‘new post-COVID’ ideal employee will need a significant prevalence of soft skills and attributes, such as flexibility, resilience, endurance, etc., coupled with other necessary technical skills required for their role/position.

Employee well-being and mental health has been a big concern for businesses and will continue to be,

especially as we transition back to the ‘workplace’. With overwhelming numbers of employees reporting burnout and fatigue, our remote working models are still ‘lacking’. Healthy habits have not yet been fully deployed. The lifting of current restrictions will allow for a clearer vision of deciding what works and what doesn’t for businesses and employees.

With a focus on employee engagement and retention strategies, it is not always easy to distinguish between the symptoms of restrictions and those of working from home. When they overlap, the vista is not clear. We need to be patient and careful when making long-standing decisions about returning or not to the office. Time is our friend and not our foe.

The temporary market

The temporary market has probably seen the highest constriction of talent. With reduced working holiday visa holders and permanent job seekers quickly taking up permanent job offers; it leaves the temporary workforce with some significant depletion. This, in turn, has driven up the hourly pay rates for candidates. The good news for both candidates and businesses is there have also been high success rates for candidates converting very quickly to permanent job opportunities. Temporary assignments still offer businesses relief for those hard to fill roles and for teams carrying the extra workload.

With these most recent lockdowns, we noticed only a small drop of 20% in our temporary workforce. This time around, most companies were comfortable having their temporary

employees work from home. It appears we have very quickly adjusted to our new working norm, which is a stark contrast to last year, where we saw many of the temporary assignments cancelled. We believe this is also a reflection upon the gap in permanent skilled workers and thus the necessary reliance upon our short-term, temporary and contract workforce.

As expected, we have also started to see requirements from businesses for job applicants to be vaccinated, mainly within healthcare, administrative and financial services. Data analysis shows employers mandating COVID jabs has increased 12-fold since May³.

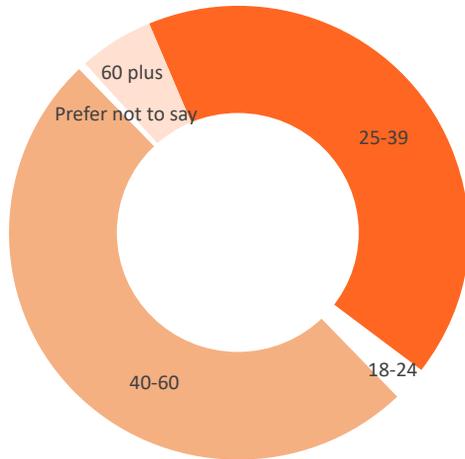
The Survey Results...



Whom We Asked

We distributed our survey to a wide variety of clients, candidates and contacts and shared it throughout our social media platforms. We collected demographic information from respondents on such details as age, gender and job.

What age bracket do you fall into?

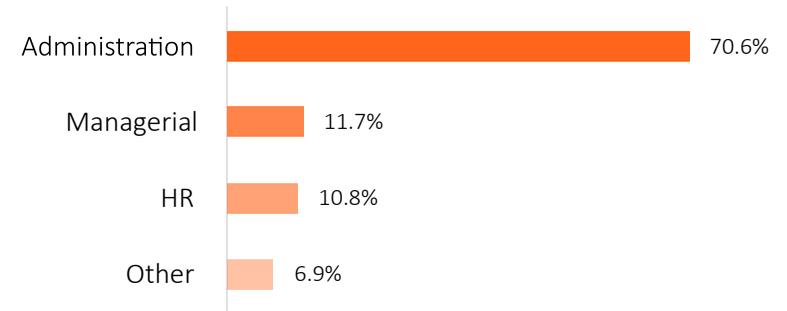


What is your gender?



95.8 % percent of respondents were female

What job category does your role fall into?

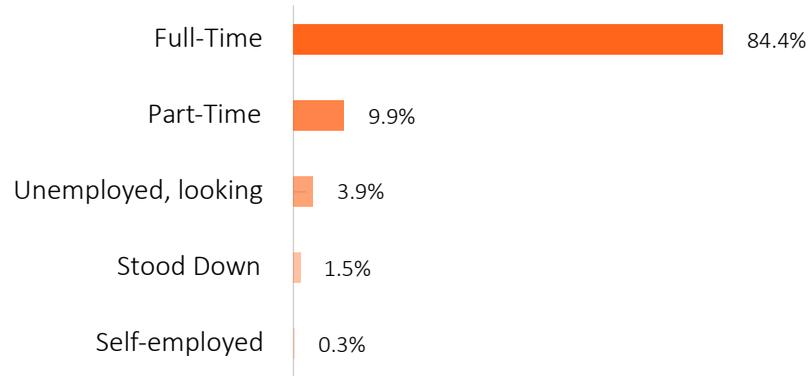


Current Employment Status



We asked if people are employed and, if employed, in what capacity. We also wanted to know how satisfied and happy people are with their jobs.

Are you currently employed?



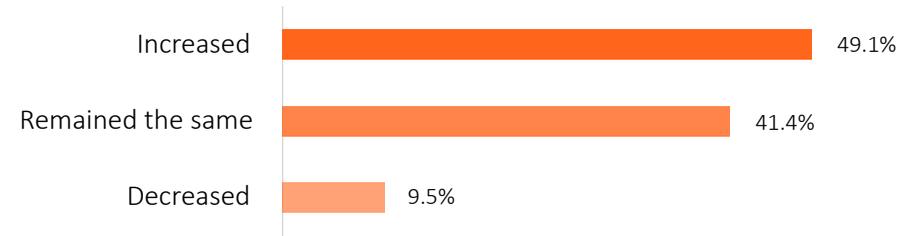
94.6% surveyed are employed, vs 79.2% in April 2021

Are you happy in your current job?



75.7% of respondents were happy in their current job vs 66% in April 2021

Has your salary increased or decreased over the last 12 months?



49.1% of respondents saw an increase in their salary

If presented with a better paying job, would you leave your current role?



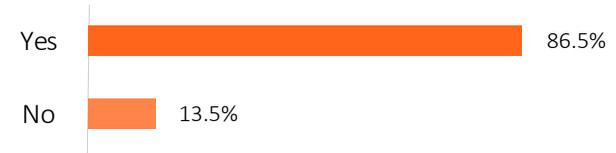
50.9% surveyed would leave their current role

Working From Home



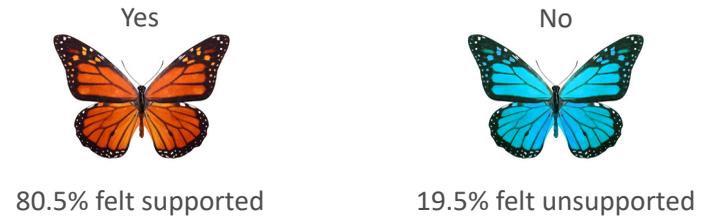
Working from home continues to be one of the critical topics to emerge from COVID. As we transition out of lockdowns and back to a 'new normal', it is essential to understand how people feel about this.

Are you currently working from home (WFH)?



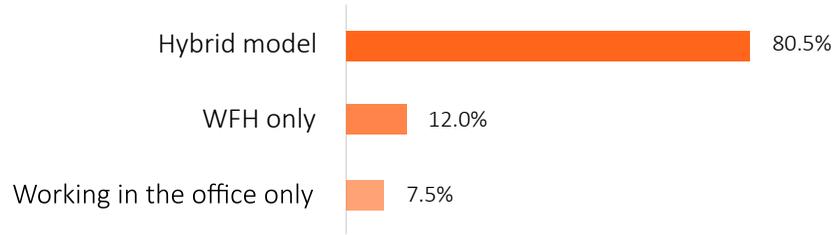
86.5% of respondents are currently WFH

Do you feel your manager has supported you during remote working this time around?



80.5% of respondents feel they were supported

What is your ideal working model?



Unsurprisingly, 80.5% of those surveyed said their ideal working model was hybrid

If your ideal working model is WFH and you were presented with a better-paying office-based only job, would you consider it?



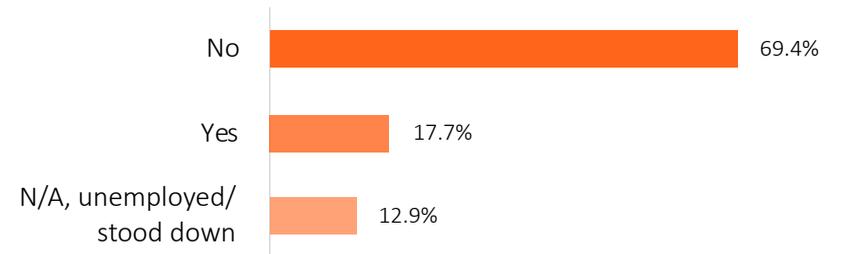
49.7% of respondents would consider an office-based only job, despite WFH being their preference

Has WFH adversely affected your mental health?



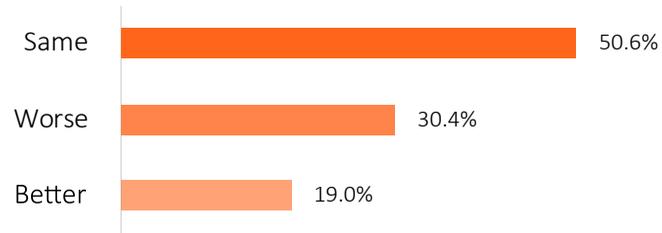
56.7% of respondents feel their mental health has been affected to some extent

If WFH, have you had to juggle childcare or home schooling at the same time?



Working Habits

Do you feel your work communication (with your co-workers and managers) has improved or worsened while working remotely?



30.4% of respondents feel their work communication has worsened since working remotely

Do you feel you are meeting your work performance expectations since WFH?

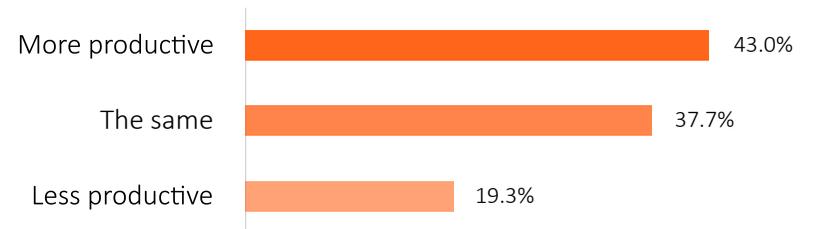


Conducting this survey, we were interested in continuing to understand more about people's working habits.

Do you feel you have learnt any new significant skills since WFH?

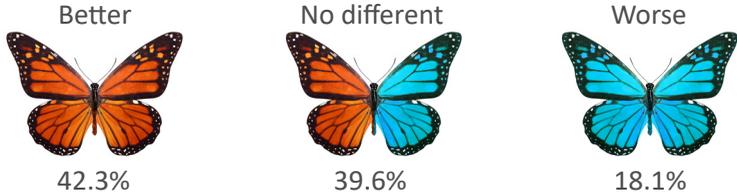


Do you think you are more productive when working from home?



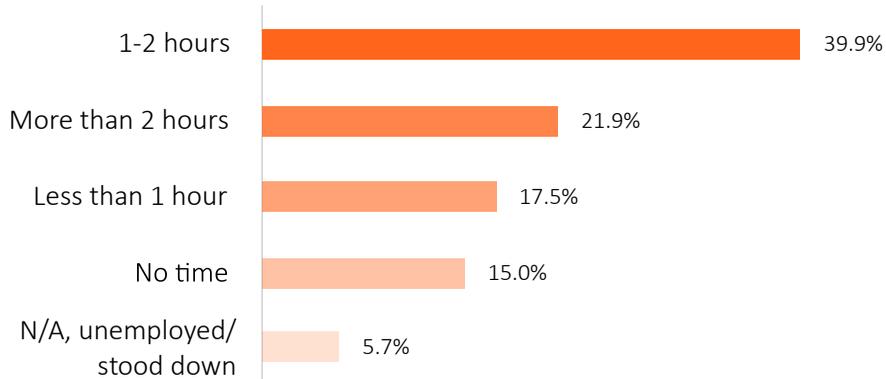
43% of those surveyed feel more productive when working from home vs 76.1% from our last survey

Has COVID-19 changed your working life habits for the better?



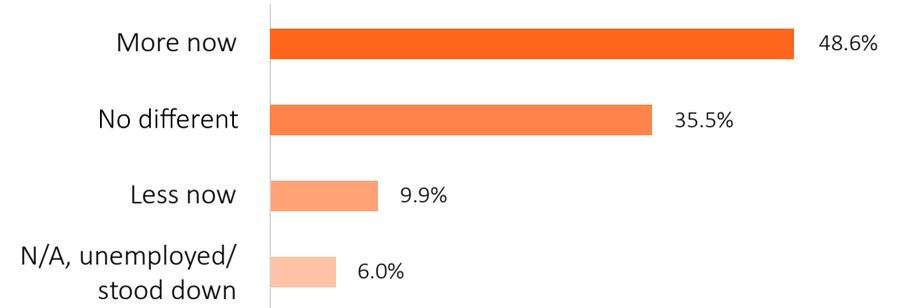
42.3% surveyed feel their working life habits had changed for the better

On average, how much time do you spend working outside the 'normal' office hours?



Only 20.7% of respondents don't work additional hours

Do you spend more or less time than before working outside 'normal' hours?



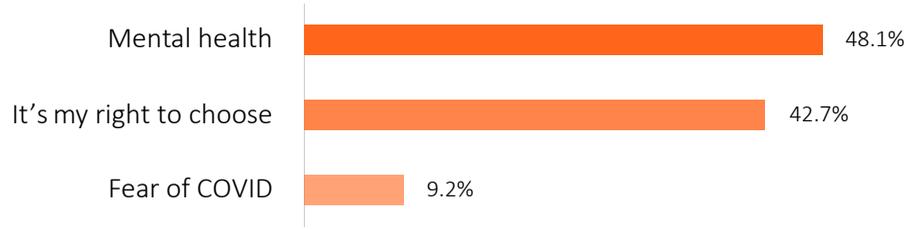
48.6% of respondents work more hours than before outside 'normal' office hours

Do you believe businesses should allow WFH as an option moving forward?



Overwhelmingly, 94.3% of those surveyed said they believe WFH should be an option

For what reason?



42.7% of those surveyed feel it was their right to choose their working model

Do you feel you have too many online meetings?



Do you feel your work communication has improved while working remotely?

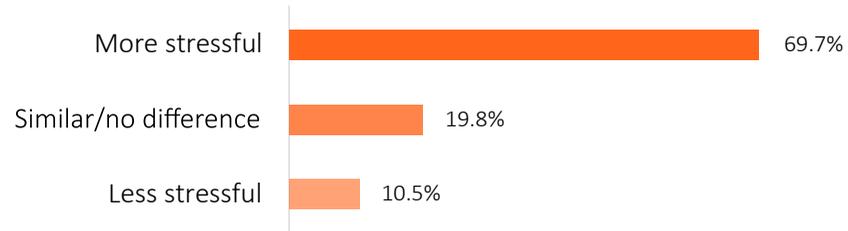


30.4% feel it was worse

Lifestyle

With health and well-being and work-life balance as important issues, we thought it relevant to capture any lifestyle changes and what may now be a priority for people.

Do you find this current lockdown more or less stressful than last year?



Do you feel WFH has adversely affected your mental health?



More than 50% of respondents felt their mental health was adversely affected due to WFH



Have you relocated in the last 18 months?



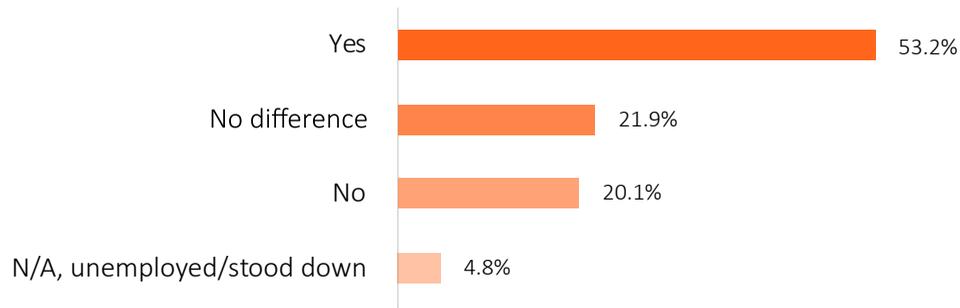
19.2% have relocated, with 39.1% stating, 'better lifestyle' and 35.9% saying, 'due to COVID'

How much quality time did you spend with your family before COVID?



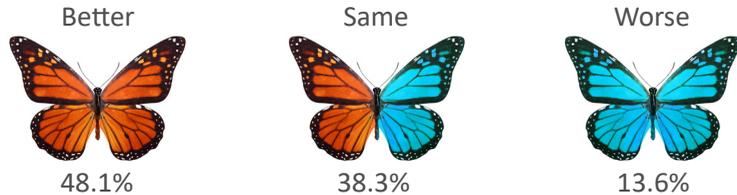
Time spent with family has increased compared to pre-COVID

If WFH, have you been able to integrate a healthier lifestyle?



53.2% of those surveyed have integrated a healthier lifestyle vs 79.4% from our last survey

Has your overall financial situation improved over the last 18 months?



48.1% of respondents said overall their financial situation has improved

Values - What Is Important?

As our lives shift and change under the extreme circumstances we have been living; it's no surprise that so too do our priorities and values. What was considered important before COVID has shifted. Consideration of these are essential in hiring and retaining employees.

Has your loyalty and trust towards your employer increased since remote working?



36.9% of respondents felt their trust and loyalty has increased

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

Top 3 most important

Pre-COVID

Now



1
Work-life balance



1
Work-life balance



2
Your salary



2
Job security



3
Company culture



3
Your salary

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

Top 3 least important

Pre-COVID

Now



1
The brand you work for



1
The brand you work for



2
Flexibility to work from home



2
Career advancement



3
Career advancement



3
Flexibility to work from home

Key Takeaways...



While data is essential to understand current and past changes in attitudes, we can't predict with certainty how collective sentiment will be as we move into the future. Some professions were affected more so during the lockdowns and restrictions, and previous ways of operating with meetings, events, gatherings, training, negotiations, etc., reverted very quickly to online and virtual.

It seems the 'convert' was quicker and more widely accepted this time round. While we adjusted, by necessity, once the limitations are lifted, we will know if proactive habits were created. No doubt, blended models, if it is a better way of working, will entail.

To keep watching and observing our world as it unfolds, we need to stay open-minded and be present in the moment. Let's be ready to keep flying long distances, even with our fragile wings, just like the Monarch butterflies do.

- More people seem happier with their current job, 75.7% vs 66% in April 2021
- 48.1% saying they are in a better financial position, with 49.1% receiving a salary increase in the last year
- 80.5% of people surveyed have a preference for a hybrid working model

- 53.2% have integrated a healthier lifestyle and quality time with family has increased
- Yet — 48.6% spend more time than before working outside regular hours, leading us to believe the concept of work-life balance is also shifting
- Mental health seems more affected this time around, 69.7% are more stressed this year
- Productivity when working from home seems to have decreased, only 43% feel more productive vs 76.1% in April 2021
- Loyalty and trust with employers have increased
- Company culture doesn't seem as important, with its disappearance from the top 3 most important to people



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