

The background of the slide is a photograph of a group of people at a social gathering, possibly a conference or networking event. The image is dimmed and has a blue overlay. People are seen in various poses, some talking, some looking at their phones, and others holding drinks. The setting appears to be an indoor space with a modern, casual atmosphere.

ELMO Employee Sentiment Index – June Quarter

Australia | April – June 2021

The relationship between employer and employee is comprised of many variables that can influence an individual's productivity, wellbeing and overall outlook. Aspects such as burnout, leave entitlements and recognition are instrumental in understanding how an employee feels in the workplace.

The ELMO Employee Sentiment Index offers an insight into the actions, attitudes and behaviours of Australian workers. The report provides a quarterly analysis of the prevailing sentiment within the workforce to track changes in perceived job security and the employment landscape.

The 2021 June Quarter ELMO Employee Sentiment Index revealed:

- Australian workers' perceptions of their job security fell 8 points from 55% to 47%. Meanwhile, their perceptions of their economic security fell 11 points from 30% to 19%
- The proportion of workers feeling burnt out climbed by 8 points to 42% of the workforce
- Employers mandating employee COVID-19 vaccinations is supported by 62% of Australian workers.
- 59% of Australian workers do not believe Australia is on track with its vaccine roll out, yet 76% believe the economy will only return to normal if an Australian COVID-19 vaccine rollout is successful

The ELMO Employee Sentiment Report was initiated to gain data and insights into the attitudes, actions and concerns of employees. Respondents were asked to reflect on their actions in the three month period of April 2021 to June 2021.

The research was commissioned by ELMO Software and conducted by Lonergan Research in accordance with the ISO 20252 standard.

Lonergan Research surveyed 1,039 Australian workers aged 18 years and over between 17 June and 27 June, 2021. The research was conducted through a 17-question online survey. Respondents were members of a permission-based panel, geographically disbursed throughout Australia including both capital city and non-capital city areas.

After surveying, data was weighted to the latest population estimates sourced from the Australian Bureau of Statistics.

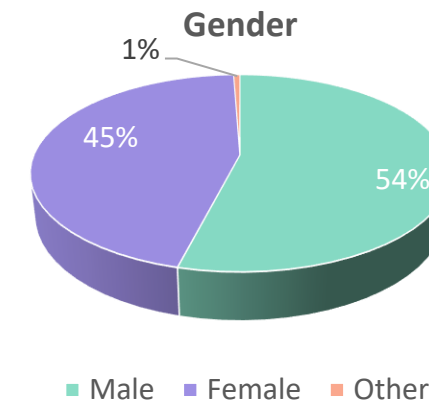
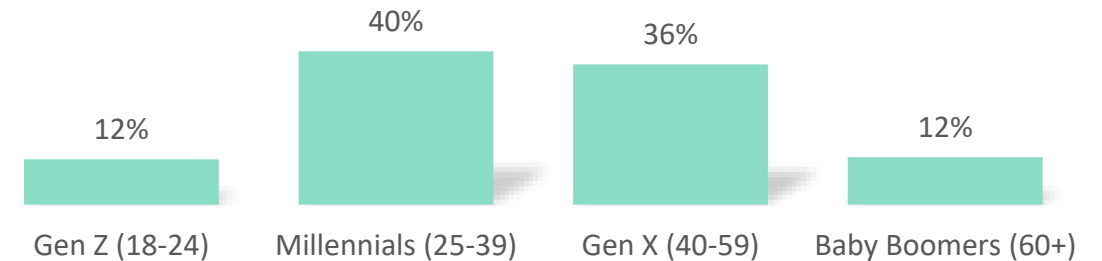


Sample breakdown / demographics



Location	Sample Size (n=1,039)		
	Overall (n= 1,039)	Capital City (n= 716)	Regional Area (n= 323)
New South Wales & ACT	205	132	73
Queensland	202	101	101
Victoria	201	164	37
South Australia	191	154	37
Western Australia	204	165	39
Tasmania	25	-	25
Northern Territory	11	-	11

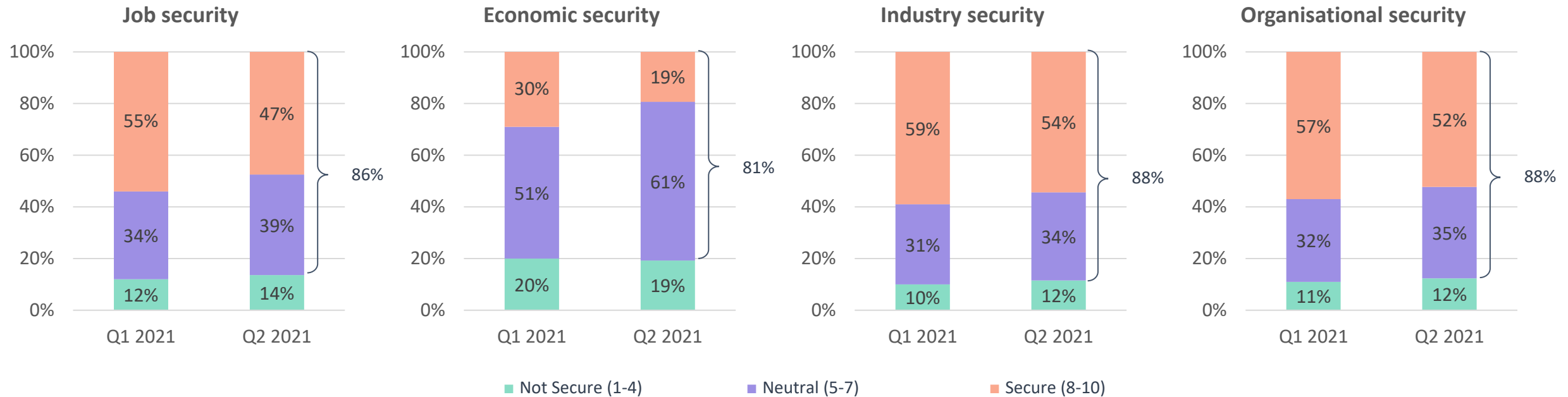
Generation Breakdown



Employee Sentiment Index – Quarterly Comparative Analysis

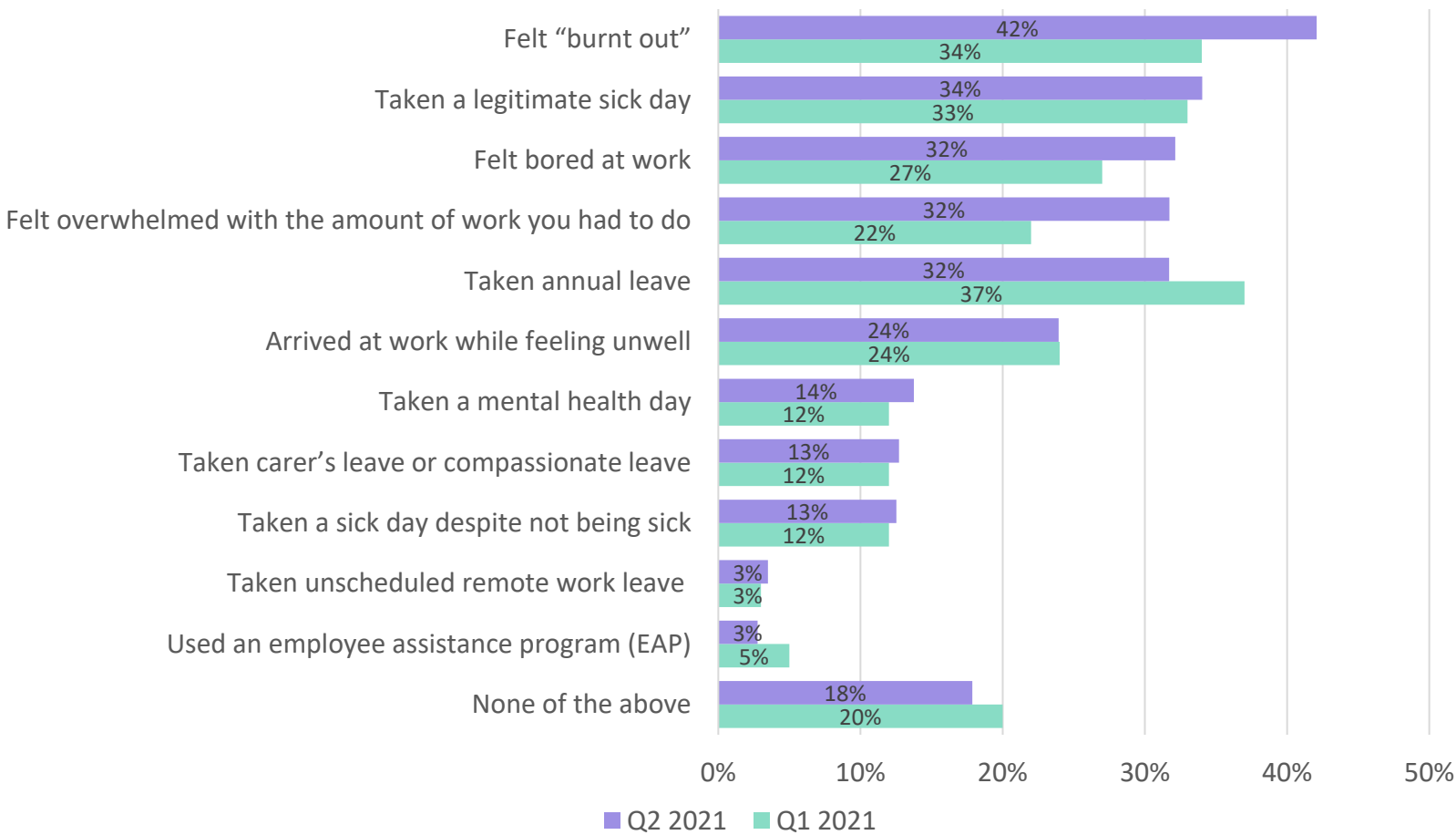


Perceived security



- Perceived security remains stable, with:
 - 47 per cent of Australians feel their job is secure, this is an eight point decline from Q1 (55%)
 - 19 per cent if Australians feel secure with the economy, this is an 11 point decline from Q1 (30%)
 - 54 per cent of Australians feel secure within their industry, down five points from Q1 (59%)
 - 52 per cent of Australians report feeling secure about their organisation, down five points from Q1 (57%)

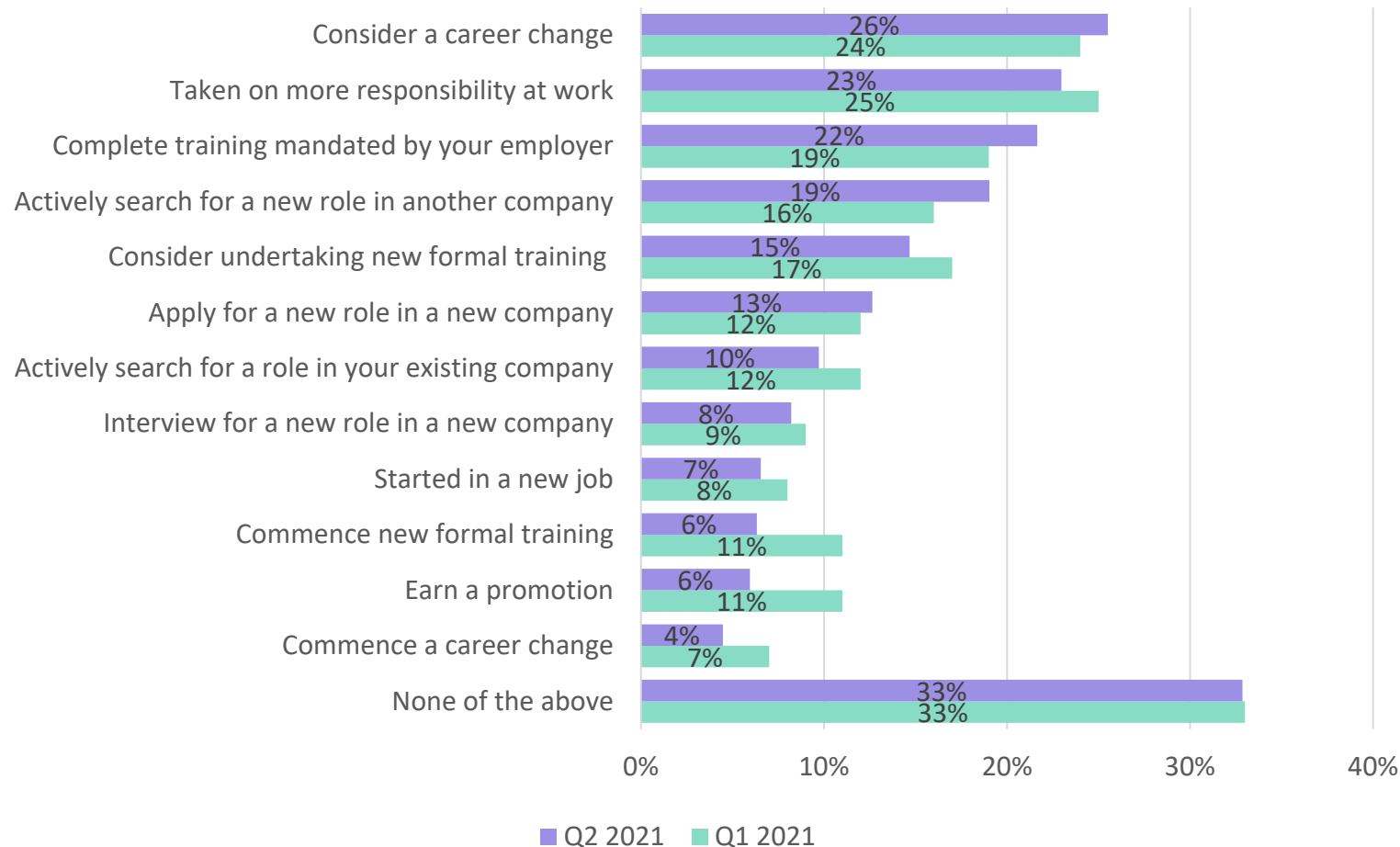
Q4. On a scale of 1 - 10, where 1 is not at all secure and 10 is extremely secure, how would you rate your feelings of security with each of the following? Australian Workers (n = 1039)
2301_Q4. On a scale of 1 - 10, where 1 is not at all secure and 10 is extremely secure, how would you rate your feelings of security with each of the following...? Australian Workers (n = 1088)



- Over the last three months, two in five (42%) workers have felt burnt out. This is an increase of eight percentage points since Q1 (34%).
- Over the last three months, a third (32%) of workers have felt overwhelmed by the amount of work they had to do, this is an increase of 10 percentage points since Q1 (22%).
- Over the last three months, a third (32%) of workers have felt bored at work, this is an increase of 5 percentage points since Q1 (27%).

Q3. Over the past three months (April to June 2021) have you...? Australian Workers (n = 1039)
2301_Q3. Over the past three months (January to March 2021) have you...? Australian Workers (n = 1088)

Workplace behaviours

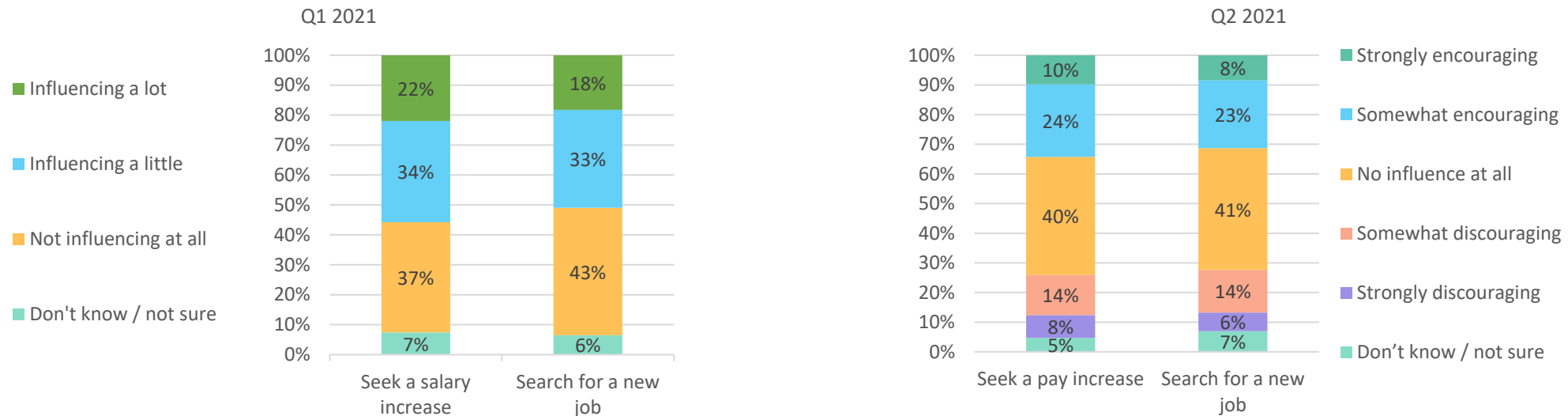


Q6. In the past three months (April to June 2021), did you...? Australian Workers (n = 1039)

2301_Q6. In the past three months (January to March 2021), did you...? Australian Workers (n = 1088)

- In the last three months, a quarter (26%) of Australians workers have considered a career change, a two point increase on Q1 (24%).
- Nearly a quarter (23%) of Australian workers have taken on more responsibility at work in the last three months, this is similar to Q1 (25%).
- Compared to Q1, Q2 saw nearly half as many Australians workers commence new formal training (6%; Q1 11%) or earn a promotion (6%; Q1 11%).
- A fifth (19%) of Australian workers actively searched for a new job in a new company in the past quarter, a three point rise on Q1 (16%).

Economy influencing decision making



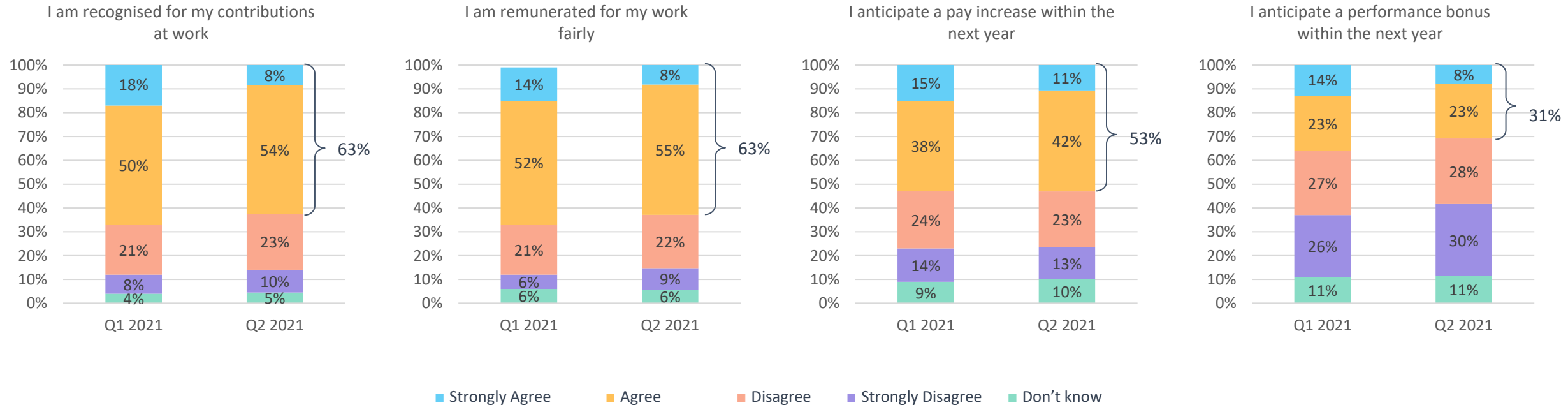
- Two in five (40%) Australian workers say the current economic conditions are having no influence at all on their decision to seek a pay increase, while a third (34%) are saying they are at least somewhat encouraged to do so and one in five (21%) are somewhat discouraged.
- Nearly a third (31%) of working Australians are encouraged by the current economic conditions to search for a new job, while one in five (21%) are at least somewhat discouraged and two in five (41%) are not being influenced at all.
- While changes to the code frame make this difficult to compare directly to Q1, we can see a similar proportion are not influenced at all by the current economic conditions in their decision to seek a pay increase (Q2 40%; Q1 37%) or new job (Q2 41%; Q1 43%).

Q11. To what extent are current economic conditions encouraging or discouraging you to do the following? Australian Workers (n = 1039)

2301. Q12a. To what extent are current Australian economic conditions influencing your decision to...? Australian Workers (n = 1088)

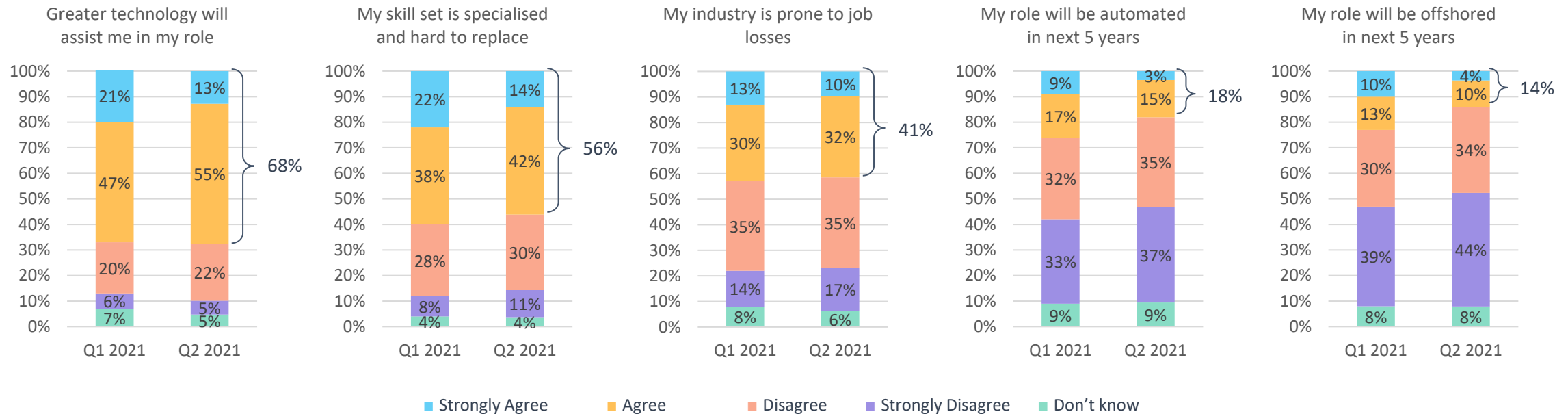
NOTE: Code frame change since Q1

Recognition and remuneration



- Nearly two thirds (63%) of Australian workers agree they are recognised for their contributions at work, and the same proportion (63%) say they are remunerated for their work fairly. Both are down slightly since Q1 at 67% and 66% respectively.
- Just over half (53%) of Australian workers anticipate a pay increase within the next year, (same as Q1) however they are less optimistic about bonuses with only 31% expecting one within the next year. Expectations of a bonus in the next year has decreased by six percentage points since Q1 (37%)

Q7. To what extent do you agree or disagree with each of the following statements? Australian Workers (n = 1039)
2301_Q7. To what extent do you agree or disagree with each of the following statements? Australian Workers (n = 1088)



- 68% of Australian workers believe greater technology will assist them in their role, this is stable since Q1 (67%).
- 56% of Australian workers believe their skill set is specialised and hard to replace, this is four percentage points down on Q1 (60%).
- Two in five (41%) Australian workers feel their industry is prone to job losses, this is similar to Q1 (43%).
- One in five (18%) Australian workers believe their role will be automated in the next five years, this is down eight percentage points since Q1 (26%). While 14% believe their role will be offshored in the next five years, this is down nine percentage points since Q1 (23%).

Q5. To what extent do you agree or disagree with each of the following statements? Australian Workers (n = 1039)
 2301_Q5. To what extent do you agree or disagree with each of the following statements? Australian Workers (n = 1088)

Employee priorities

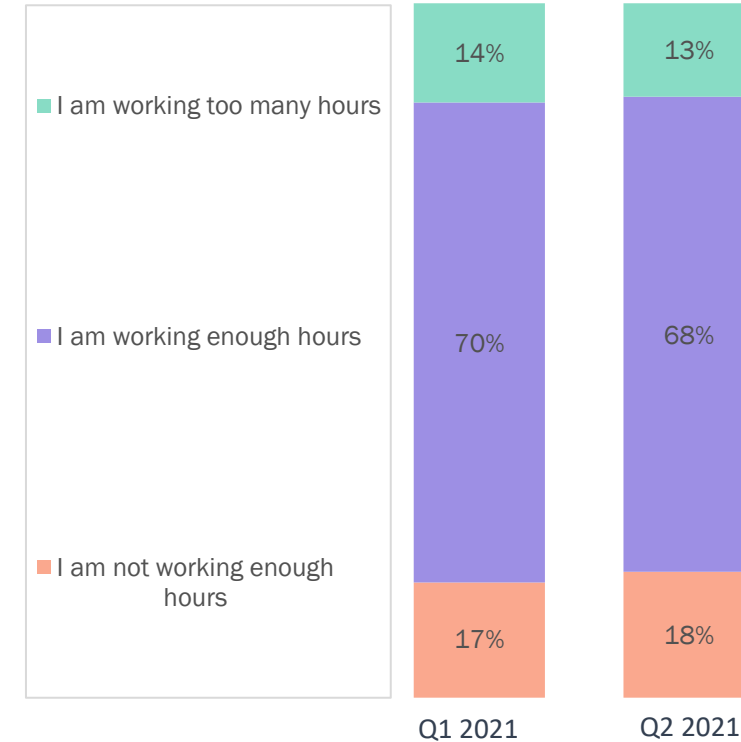
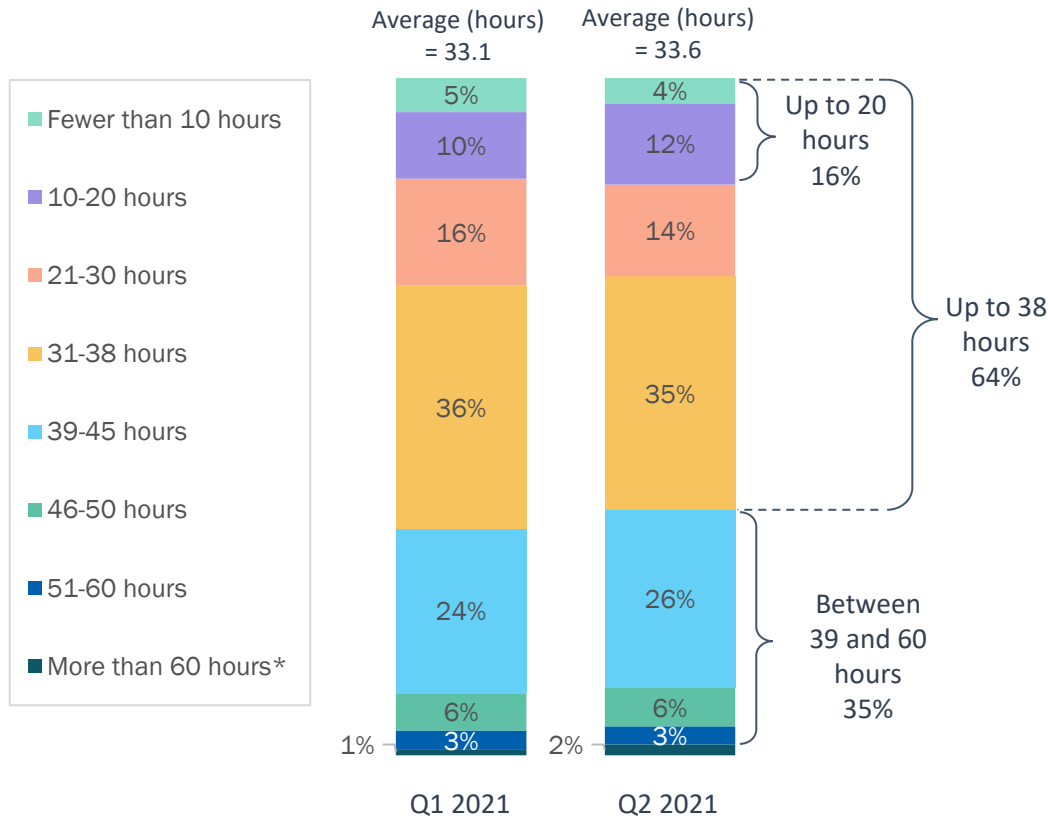


	Q1 2021	Q2 2021
Remuneration and bonus payments / incentives	2 nd	1 st
Stability of an organisation	3 rd	2 nd
Flexible/Remote working	1 st	3 rd
Culture of the organisation	4 th	4 th
Easy and/or short commute	5 th	5 th
Career development opportunities	6 th	6 th
The ethical standing/reputation of the organisation and leadership	7 th	7 th
Professional learning opportunities	8 th	8 th
Wellbeing initiatives	10 th	9 th
Diversity among employees/senior leadership team of the organization	9 th	10 th
Online or word-of-mouth employee reviews of the leadership	11 th	11 th

- Remuneration and bonus payments / incentives, stability, and flexible/remote working top the list as the most important factors Australian workers look for when choosing a new employer, with organisational culture narrowly coming in fourth place.
- The top factors are consistent with Q1, however flexible/remote working falls from top position to third.

Q9. Thinking about choosing a new employer, rank your top five most important factors from the list below. Australian Workers (n = 1039)
2301_Q9. Thinking about choosing a new employer, rank your top five most important factors from the list below. Australian Workers (n = 1088)

Hours worked



- On average, Australian workers are clocking in nearly 34 hours per week (33.6), this is similar to Q1 (33.1 hours).

- Around one in five (18%) Australians workers feel they are not working enough hours, this similar to Q1 (17%).

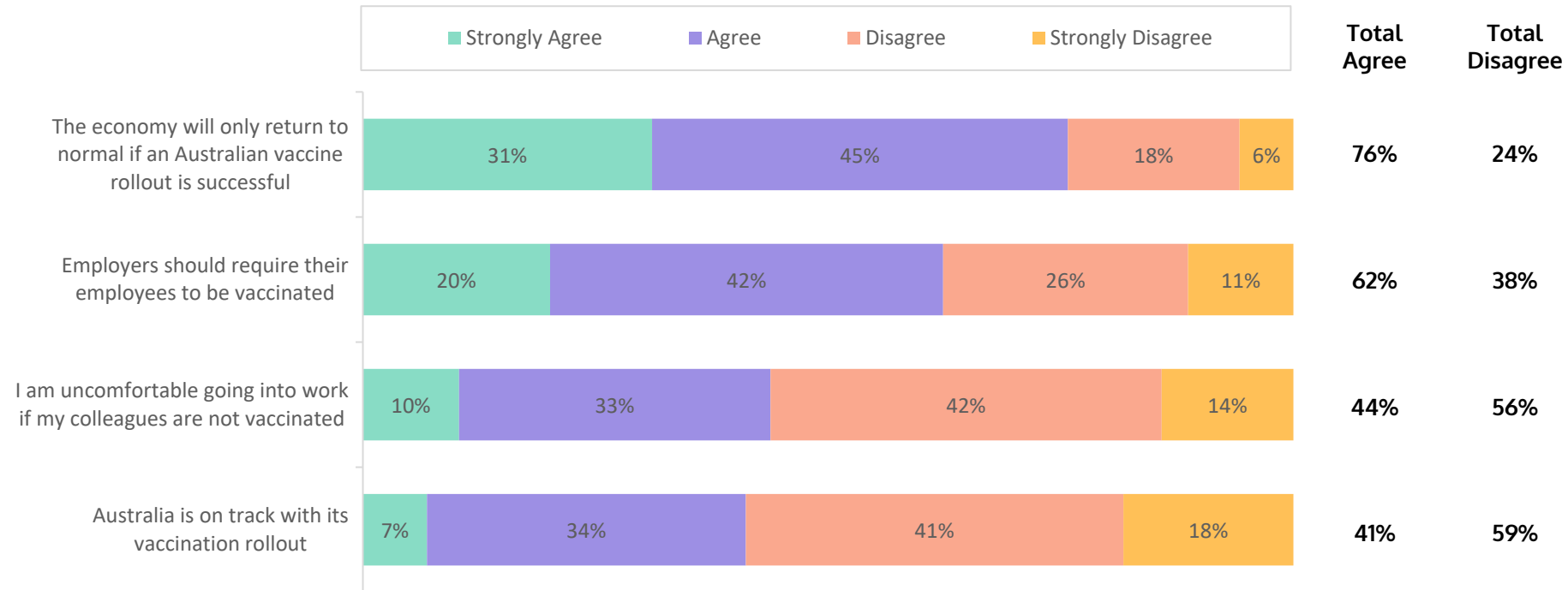
Q1. Ordinarily, how many hours do you work per week? Australian Workers (n = 1039)
 2301_Q1. Ordinarily, how many hours do you work per week? Australian Workers (n = 1088)
 *Changed from "More than 61 hours in Q1"

Q2. Over the past three months (April to June 2021), which of the following statements best applies to you regarding the hours you worked? Australian Workers (n = 1039)
 2301_Q2. Over the past three months (January to March 2021), which of the following statements best applies to you in regard to the hours you worked? Australian Workers (n = 1088)

Topical matters – Q2 2021 findings



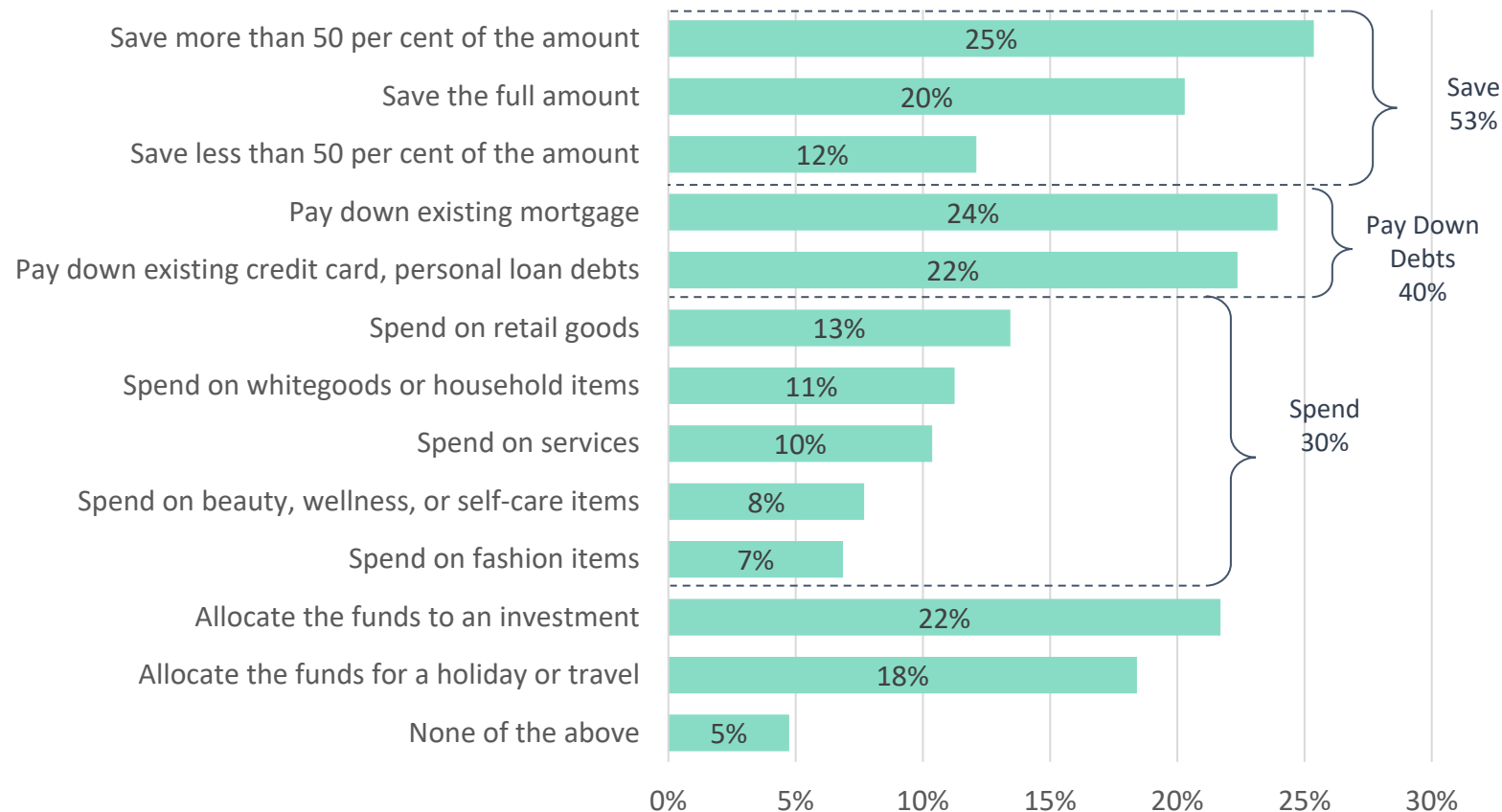
Worker vaccine sentiment



- Three quarters (76%) of Australian workers believe the economy will only return to normal if an Australian COVID-19 vaccine rollout is successful, yet only two in five (41%) workers believe Australia is on track with its vaccination rollout.
- Three in five (62%) Australian workers believe employers should require their employees to be vaccinated.
- Nearly half (44%) of Australian workers are uncomfortable going into work if their colleagues are not vaccinated.

Q13. Thinking about the vaccines for COVID-19, to what extent do you agree or disagree with each of the following statements? Australian Workers (n = 1039)

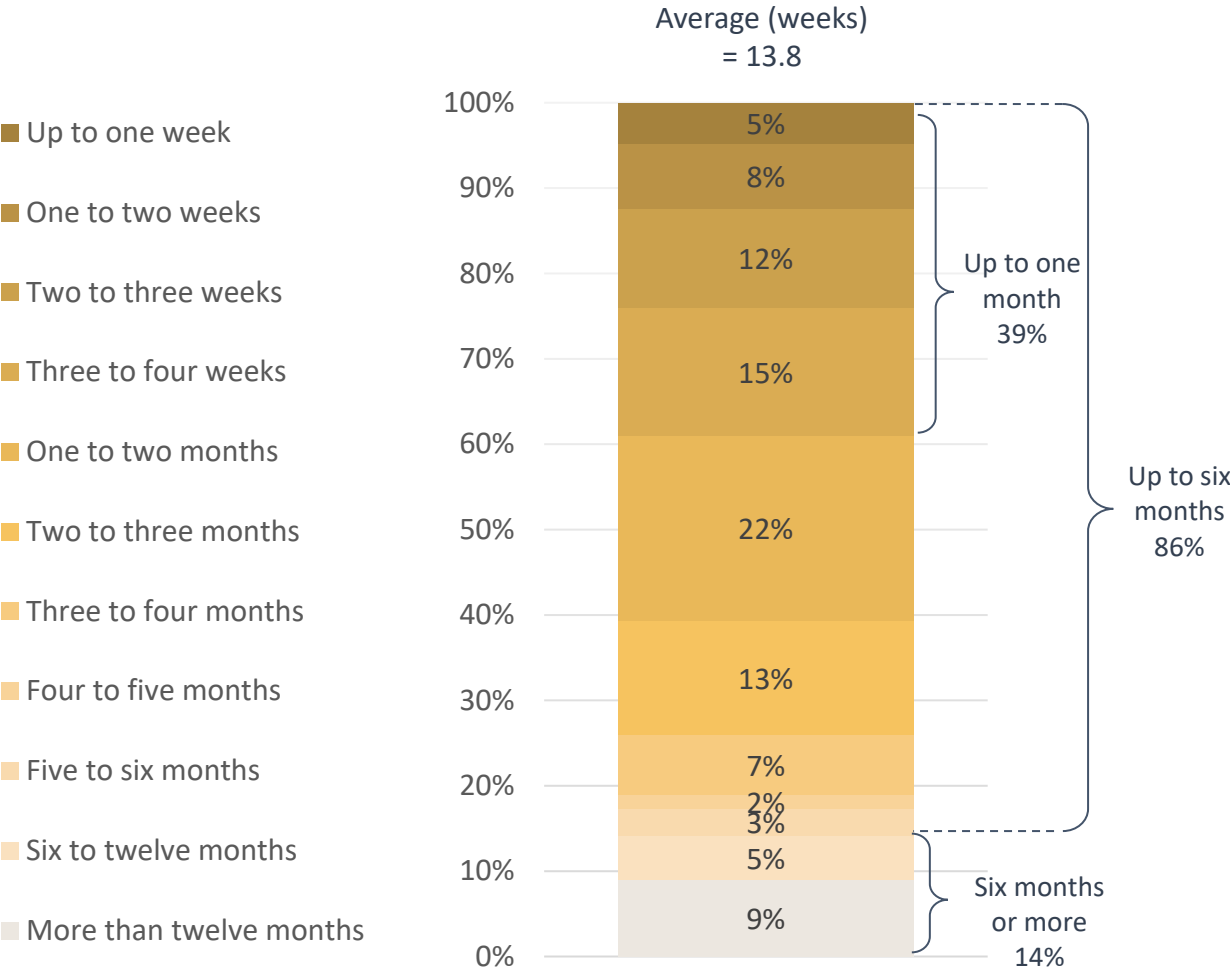
Disposable income intentions



- Australian workers would most likely save (53%) any disposable income they receive in the near future, with a quarter (25%) of workers saving more than 50 per cent of the amount, and one in five (20%) saving the full amount.
 - Gen X are the most likely to pay down debts (49%; Gen Z 21%, Millennials 42%, Baby Boomers 28%)

Q12. Thinking about any disposable income (such as tax refunds, bonus payments or additional monies) you may receive in the new financial year, what do you intend to do with any available funds? Australian Workers (n = 1039)

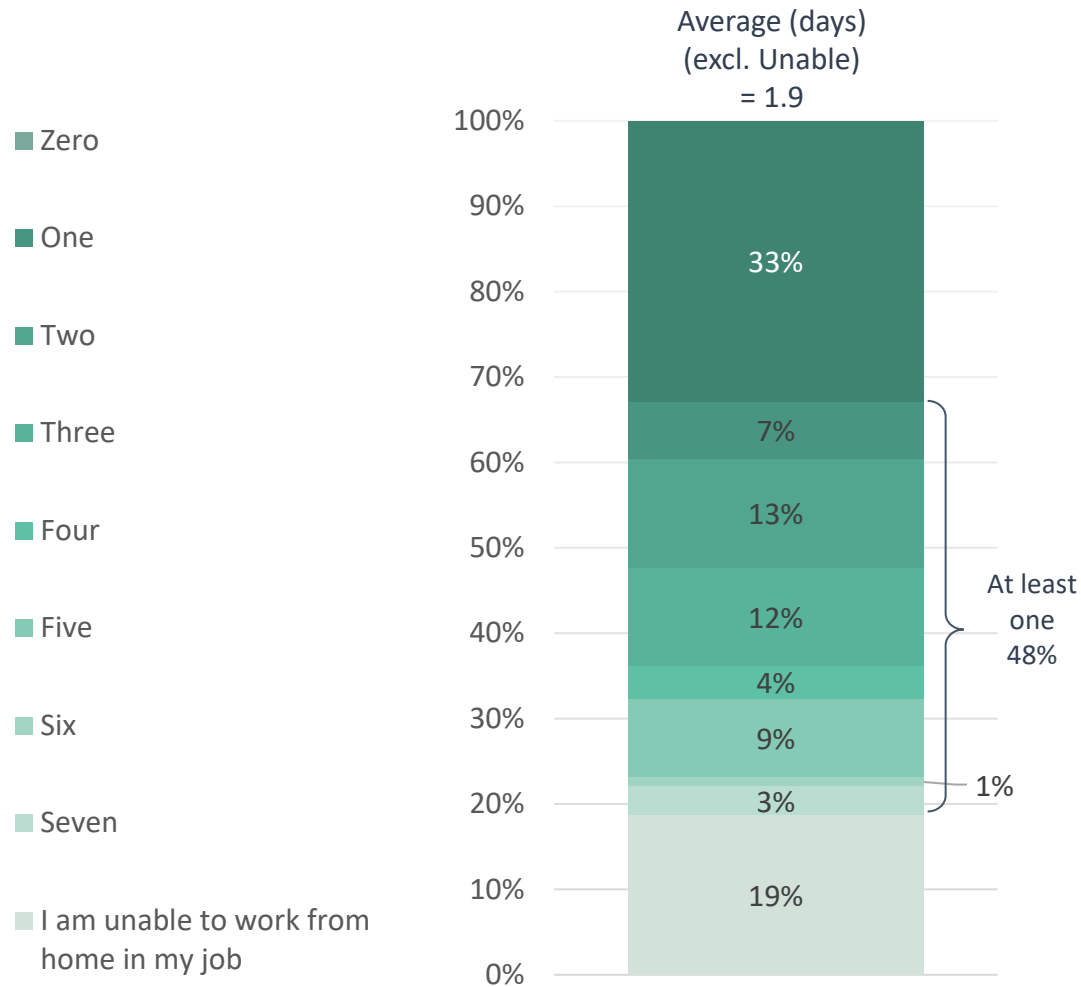
Time taken to find a new job



- If they were to lose their job today, Australian workers believe it would take them on average nearly 14 weeks (13.8 weeks) to get a comparable job.
 - Younger workers believe they can find a comparable job much faster than older workers (Gen Z 9.2 weeks, Millennials 9.6 weeks; Gen X 17.1 weeks, Baby Boomers 22.3 weeks)
- Two in five (39%) Australian workers believe they'd be able to find a comparable job within a month if they were to lose their job today, while one in seven (14%) believe it would take them at least six months.

Q15. If you were to lose your job today, how long do you think it would take to get a new comparable job? Australian Workers (n = 1039)

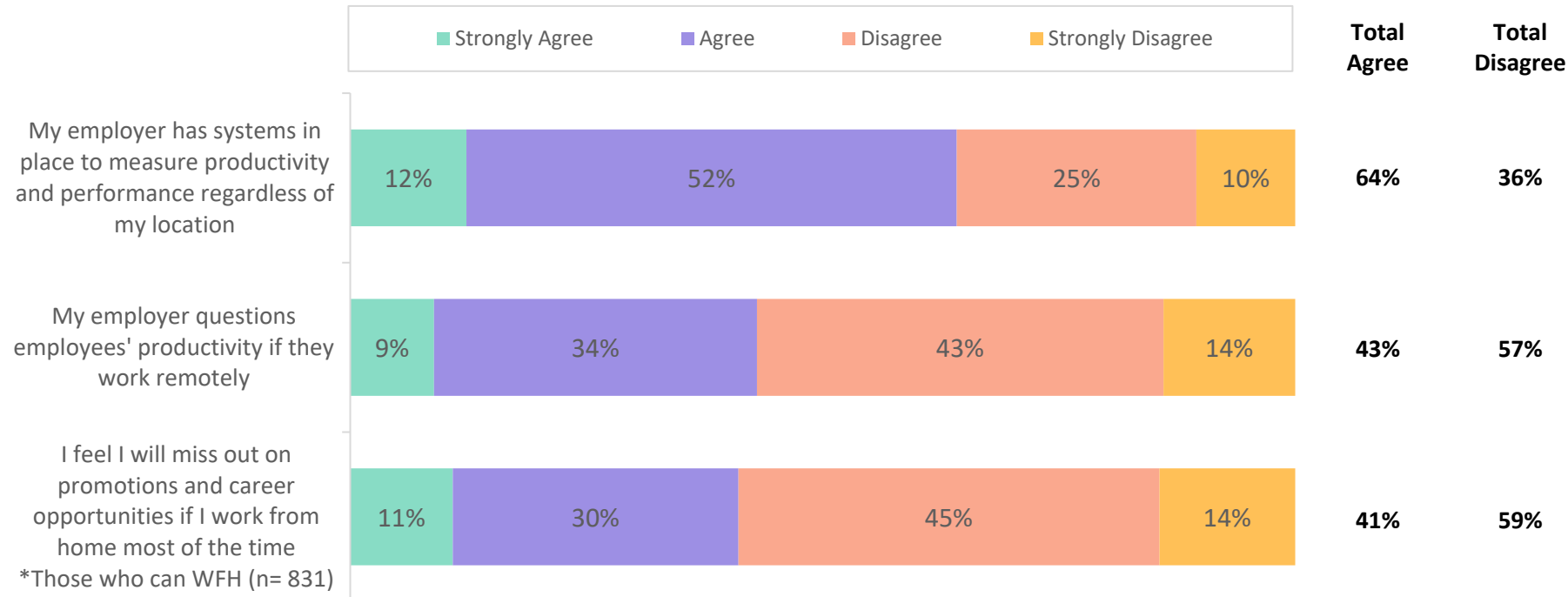
Working from home intention



- Australian workers who are able to work from home intend to work from home for around two days (1.9) per week over the next three months.
- A third (33%) of Australian workers do not intend to work from home over the next three months, while one in five (19%) are unable to.
 - Victorian workers are the most likely to say they will work from home five days a week for the next three months (15%; NSW/ACT 8%, QLD 7%, SA 7%, WA 5%, TAS/NT 6%)

Q16. How many days per week do you intend to work from home in the next three months? Australian Workers (n = 1039)

Remote working and employers



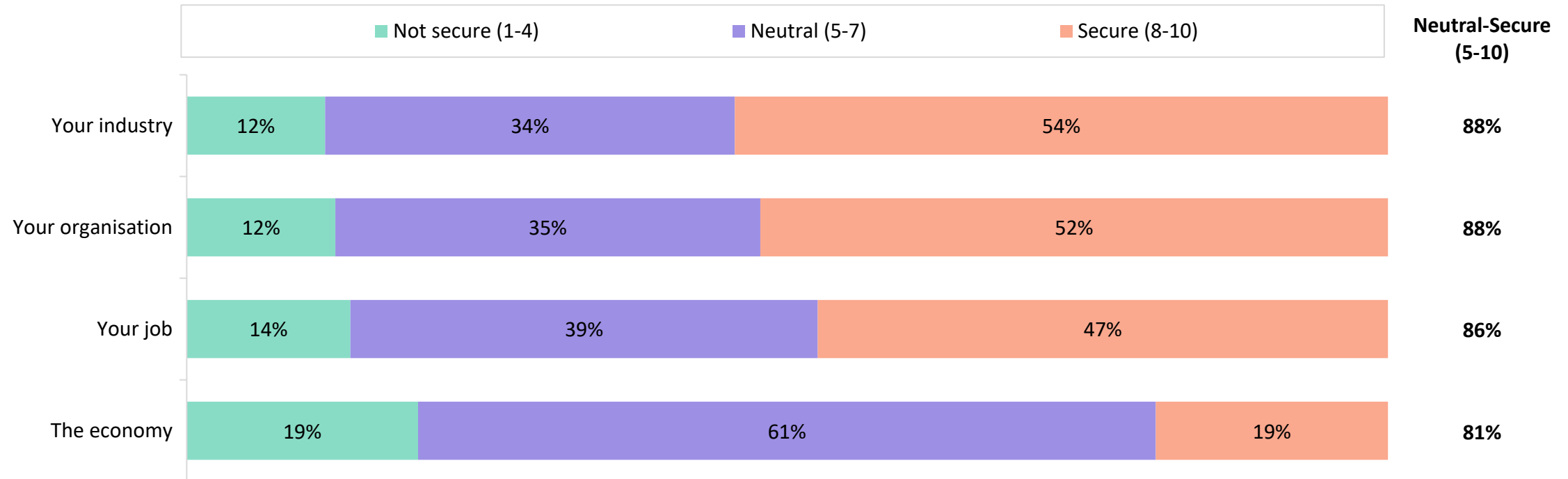
- Two thirds (64%) of Australian workers say their employer has systems in place to measure productivity and performance regardless of their location.
- 43% of Australian workers have employers who question employee productivity if they work remotely.
- Two in five (41%) Australian workers who can work from home, feel they will miss out on promotions and career opportunities if they work from home most of the time.

Q17. To what extent do you agree or disagree with the following statements? Australian Workers (n = 1039)

Employee Sentiment Index – Q2 2021 findings

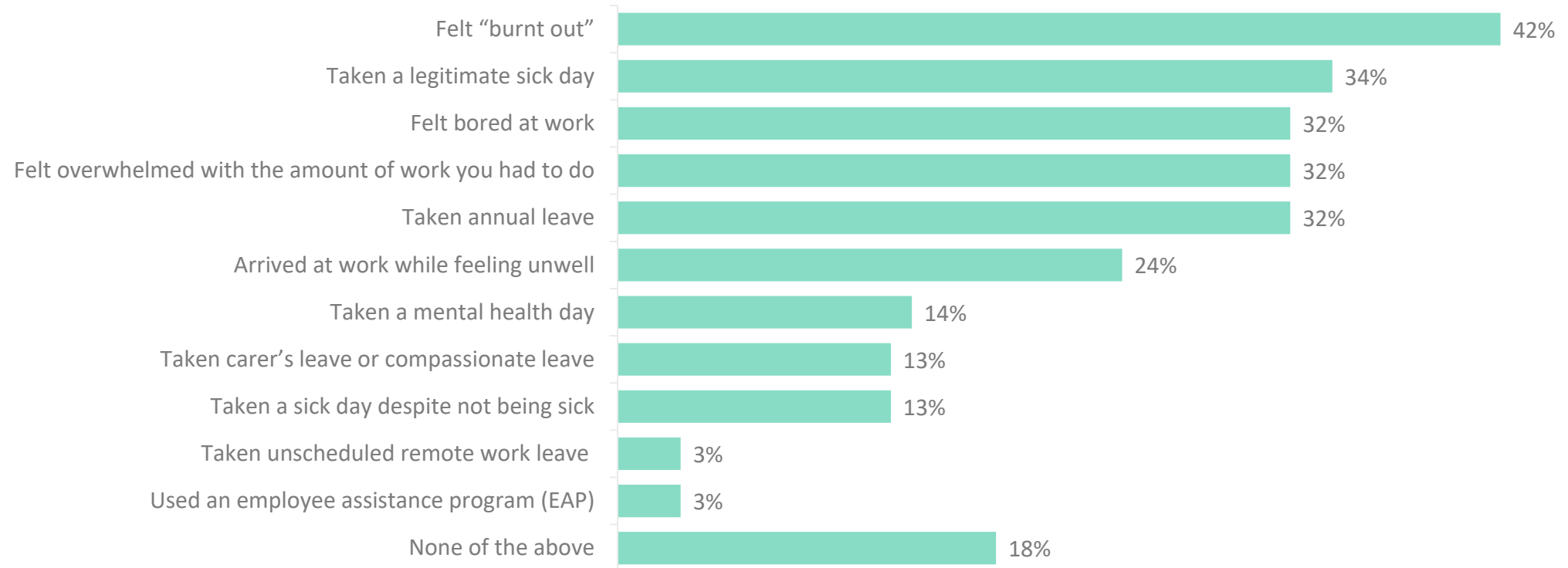


Perceived security



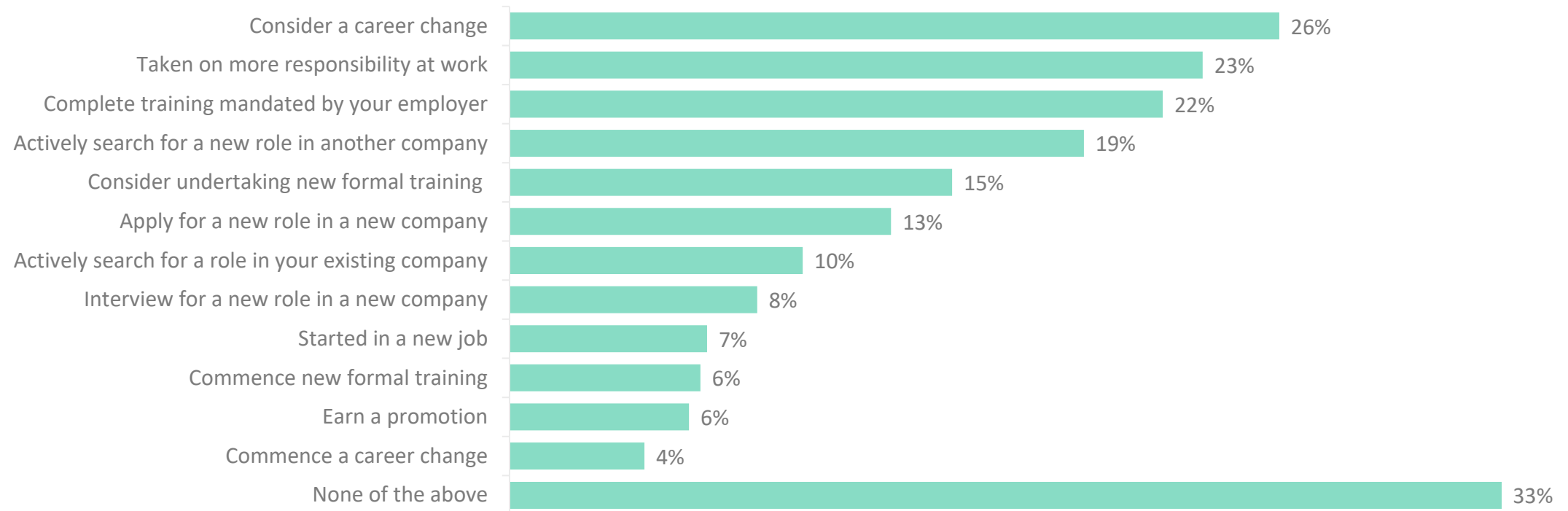
- Over half of Australian workers feel their industry (54%) and their organisation (52%) are secure, whilst a little under half feel their job is secure (47%).
- Only one in five (19%) Australian workers feel the economy is secure.

Q4. On a scale of 1 - 10, where 1 is not at all secure and 10 is extremely secure, how would you rate your feelings of security with each of the following? Australian Workers (n = 1039)



- In the past three months two in five (42%) Australian workers have felt 'burnt out', and a third (32%) have felt bored at work.
- A third (32%) of Australian workers have felt overwhelmed with the amount of work they've had to do.

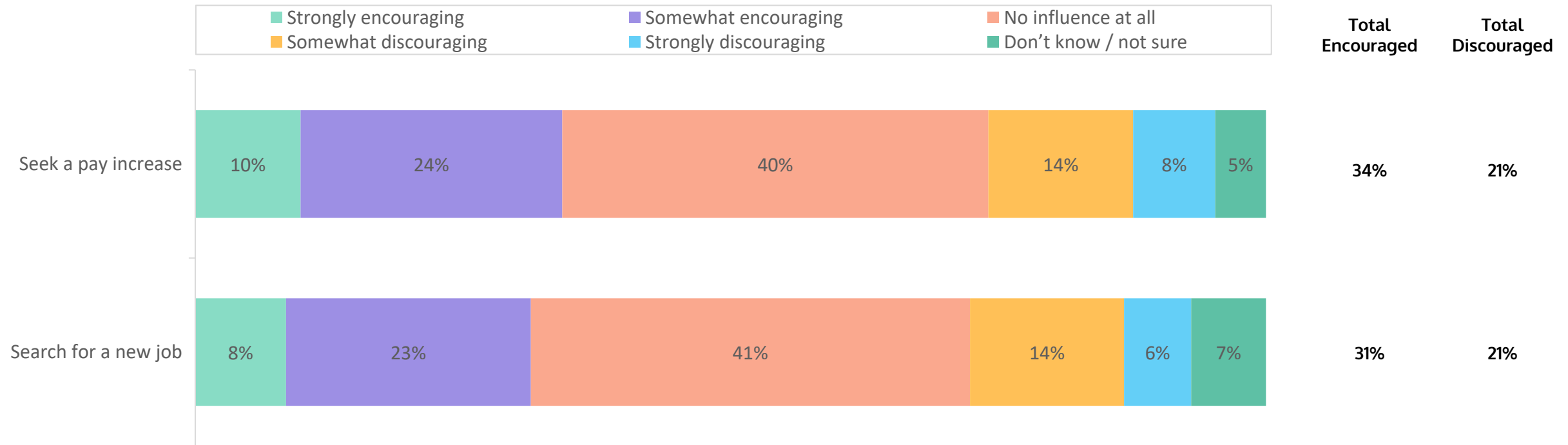
Q3. Over the past three months (April to June 2021) have you...? Australian Workers (n = 1039)



- A quarter (26%) of Australians considered a career change in the past three months, whilst 4% followed through and started work in a new career.
- Nearly a quarter (23%) have taken on more responsibility at work, this is driven by full-time workers (26%; part-time 13%, casual 17%).

Q6. In the past three months (April to June 2021), did you...? Australian Workers (n = 1039)

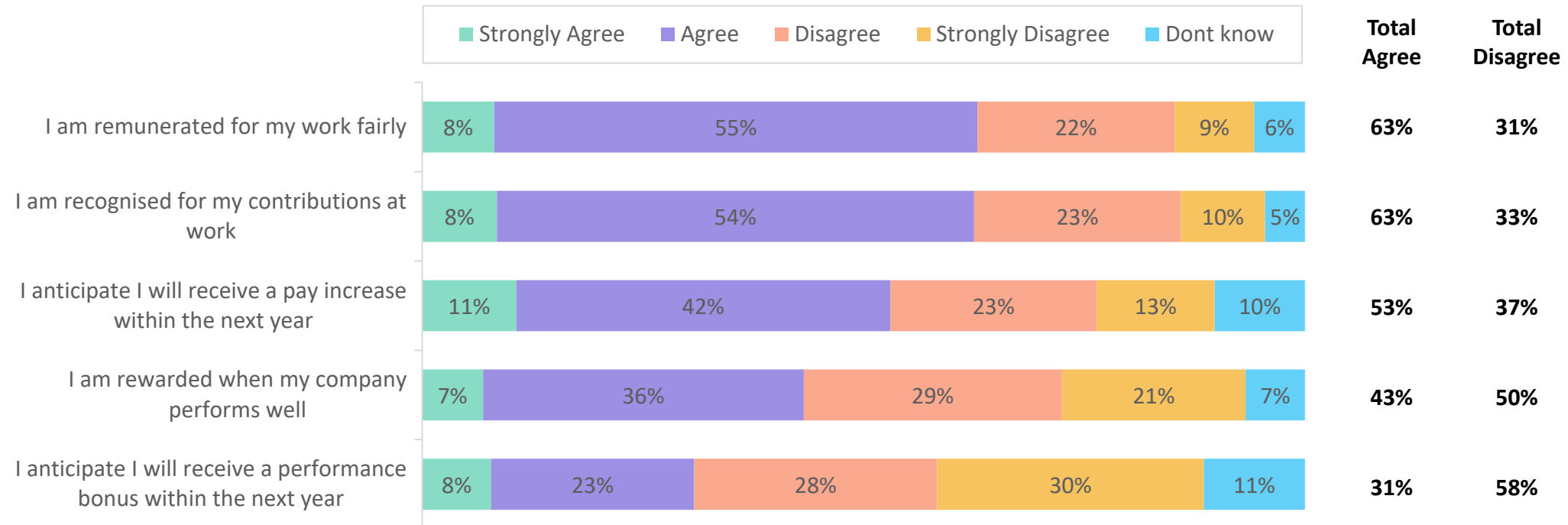
Economy influencing decision making



- A third (34%) of Australian workers are at least somewhat encouraged by the current economic conditions to seek a pay increase while nearly a third (31%) are encouraged to search for a new job.
 - The younger generations are most likely to be encouraged to seek a pay increase (Gen Z 44%, Millennials 46%; Gen X 26%, Baby Boomers 11%), and search for a new job (Gen Z 42%, Millennials 40%; Gen X 27%, Baby Boomers 7%)

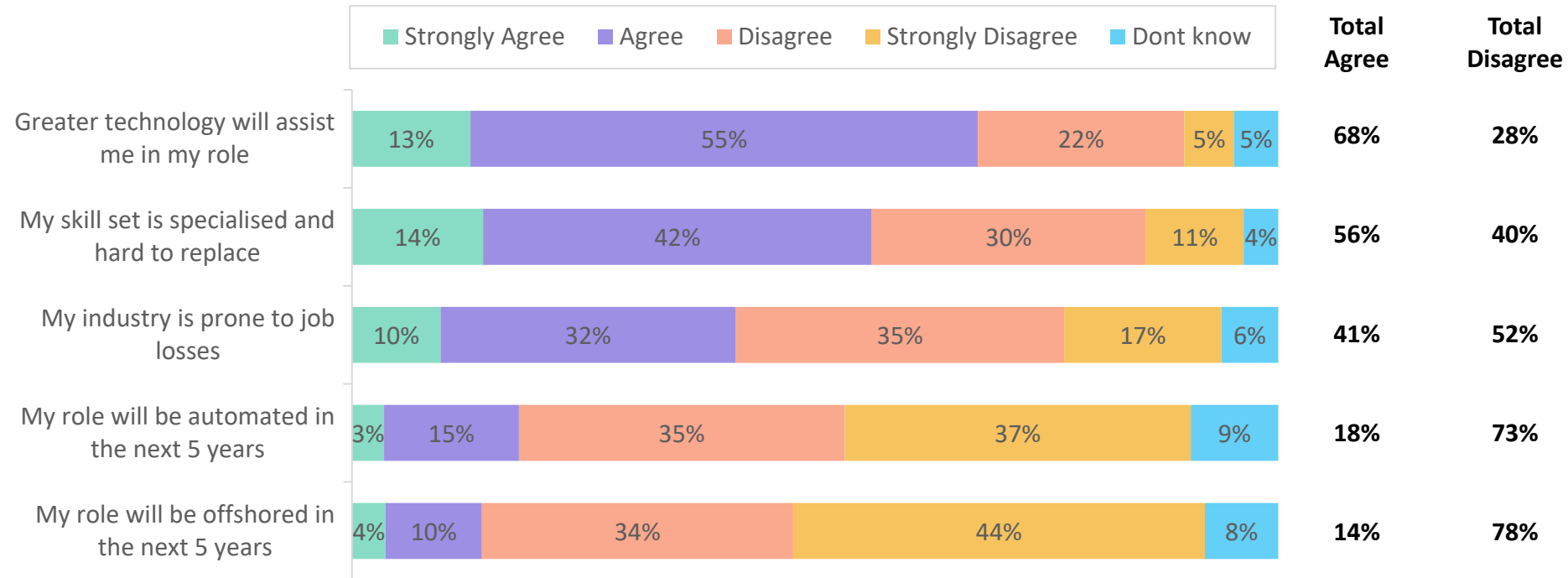
Q11. To what extent are current economic conditions encouraging or discouraging you to do the following? Australian Workers (n = 1039)

Recognition and remuneration



- Nearly two thirds (63%) of Australian workers agree they are recognised for their contributions at work, and the same proportion (63%) say they are remunerated for their work fairly.
- Just over half (53%) of Australian workers anticipate a pay increase within the next year, however they are less optimistic about bonuses with only 31% expecting one within the next year.
 - Men are more likely to expect a pay increase (58%; women 48%) and expect a bonus (33%; women 29%) within the next year

Q7. To what extent do you agree or disagree with each of the following statements? Australian Workers (n = 1039)



- Two thirds (68%) of Australian workers feel greater technology will assist them in their role.
- Nearly three in five (56%) Australian workers are confident their skill set is specialised and hard to replace. This is driven by men (63%; women 49%)

Q5. To what extent do you agree or disagree with each of the following statements? Australian Workers (n = 1039)

Employee priorities

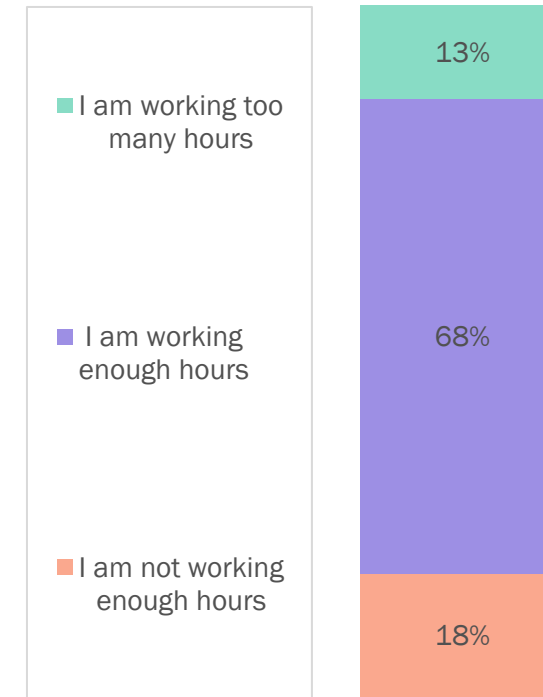
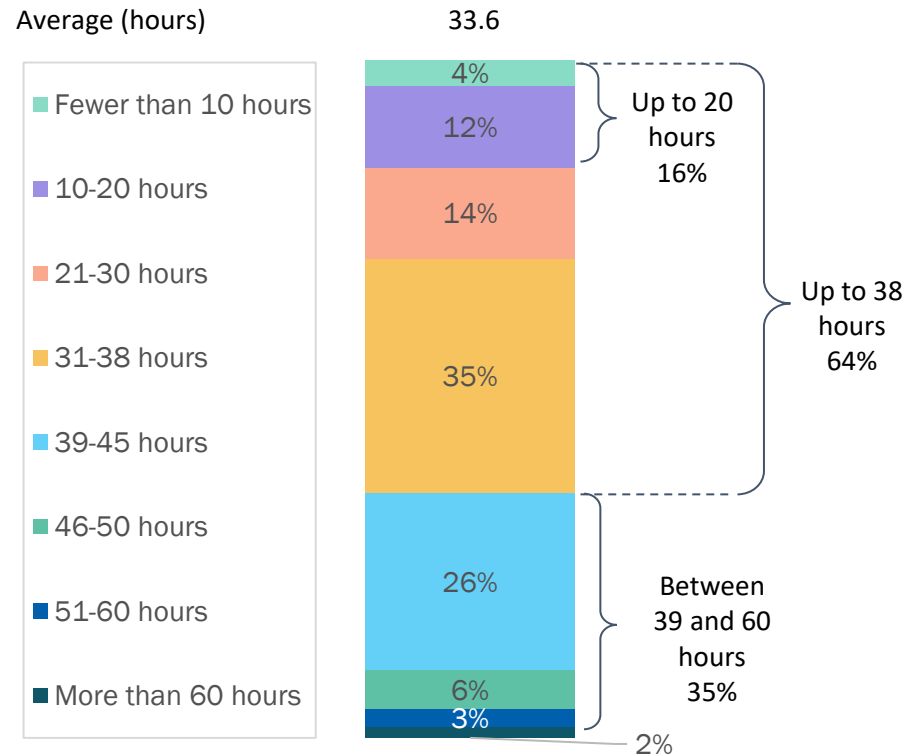


	Overall Rank	% Ranked 1st	% Ranked 2nd	% Ranked 3rd	% Ranked 4th	% Ranked 5th
Remuneration and bonus payments / incentives	1 st	15%	17%	15%	10%	10%
Stability of an organisation	2 nd	17%	13%	13%	10%	11%
Flexible and remote working	3 rd	15%	12%	13%	11%	10%
Culture of the organisation	4 th	13%	13%	11%	12%	11%
Easy and/or short commute	5 th	9%	13%	10%	10%	11%
Career development opportunities	6 th	11%	10%	9%	12%	9%
The ethical standing/reputation of the organisation and leadership	7 th	7%	6%	6%	8%	9%
Professional learning opportunities	8 th	5%	4%	8%	9%	10%
Wellbeing initiatives	9 th	3%	6%	6%	8%	8%
Diversity among employees/senior leadership team of the organisation	10 th	2%	4%	5%	6%	7%
Online or word-of-mouth employee reviews of the leadership	11 th	3%	2%	4%	4%	4%

- Remuneration and bonus payments / incentives, stability, and flexible/remote working top the list as the most important factors Australian workers look for when choosing a new employer, with organisation culture narrowly coming in fourth place.
 - Men are much more likely than women to have ranked remuneration and bonus payment / incentives first (19%; women 10%), while women are more likely to have not ranked it at all (40%; men 29%)

Q9. Thinking about choosing a new employer, rank your top five most important factors from the list below. Australian Workers (n = 1039)

Hours worked



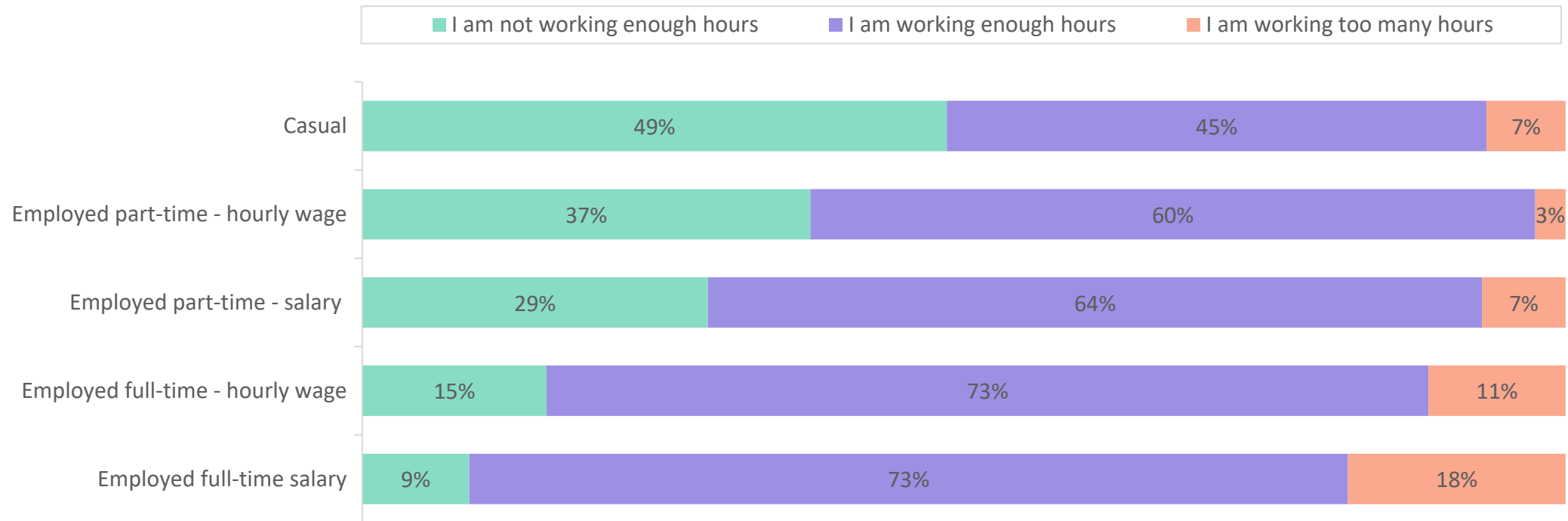
- On average, Australian workers are clocking in nearly 34 hours per week (33.6), this is highest among Gen X (36.0; Gen Z 29.9, Millennials 34.0, Baby Boomers 28.8)

Q1. Ordinarily, how many hours do you work per week? Australian Workers (n = 1039)

- Around one in five (18%) Australian workers feel they are not working enough hours. This is driven by women (21%; men 15%).

Q2. Over the past three months (April to June 2021), which of the following statements best applies to you regarding the hours you worked? Australian Workers (n = 1039)

Sufficiency of hours worked



- Half of Australian casual workers (49%) feel that they did not work enough hours in the past three months.

Q2. Over the past three months (April to June 2021), which of the following statements best applies to you regarding the hours you worked? Australian Workers (n = 1039)

Questions?



www.elmosoftware.com.au



contactus@elmosoftware.com.au



ELMO Cloud HR & Payroll



ELMO_Software



ELMOSoftware

