



Employee Sentiment Index: Q4 2024

Australia | October - December 2024





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Methodology

1K+
RESPONDENTS

**Oct-Dec
2024**



**Australian
Employees**

The ELMO Employee Sentiment Index offers a regular pulse check on the actions, attitudes and behaviours of Australia's employees. The quarterly report provides analysis of the prevailing sentiment within the workforce in order to track changes in perceptions around job security, wellbeing and the economy, as well as topical issues impacting Australian workers.

For this wave of the survey, respondents were asked to reflect on the three-month period between October 2024 to December 2024.

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

Lonergan Research surveyed 1,021 Australian workers aged 18 years and over between 17th December 2024 and 28th December 2024. The research was conducted via a 15-question online survey. Respondents were members of a permission-based panel, geographically dispersed 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.

Key Findings

Fixed Questions

Each quarter, we ask the same ten core questions to track and benchmark employee sentiment. This quarter Australian employees feel less pressure to work longer or harder hours to secure their jobs than last quarter (37% in Q4 2024, compared to 38% in Q3 2024). Gen Z employees are more likely to feel this way, with 49% reporting this sentiment, compared to 40% of Millennials, 29% of Gen X, and 17% of Baby Boomers.

Untaken Leave Trend Continues

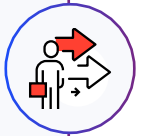
33%

of employees have taken annual leave this quarter, a significant drop from last year, when 45% took leave at the start of the holiday season.



Gen Z Most Mobile

Compared to other generations, Gen Z has had the most active quarter with 16% earning a promotion, 17% applying for a new role, and 15% interviewing for a new role in a new company.



Fair Pay On The Rise



The number of Australian employees who believe they're paid fairly for their work continues to increase, reaching a new peak of 69%, a four percentage point increase from last year (65%).

Economic Impact



A third of employees believe economic conditions encourage them to search for a new job (33%), which is three percentage points lower than the same time last year (Q4 2023 36%).

Key Findings

Topical Questions

Each quarter we include topical questions to explore specific trends or timely sentiments. This quarter, we focused on employees' views of the recruitment process.

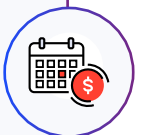
The start of the year is a crucial period for HR professionals to refine and strengthen their recruitment strategies, ensuring they are prepared to attract top talent.

Over a third (34%) of Australian employees rate their overall recruitment experience as good, however, the majority of this sentiment is held by Baby Boomers (44%), while Millennials (32%), and Gen Z (33%), are less likely to hold this view. Given these generations will soon comprise the majority of the employment market, there is a huge opportunity to improve recruitment processes.

Employee Frustrations

38%

of Australian employees (nearly two fifths) say no salary information till late in the process is the most frustrating element of the recruitment process. Followed closely by prolonged decision-making time or response time (35%).



New Year, New Employee?



Almost two-thirds (65%) of Australian employees believe the start of the year is an ideal time to look for a new job, with 49% feeling refreshed after the Christmas break and ready to begin their search.

Capture An Active Job Market



One in four (25%) Australian employees don't think they're in the right role for them, suggesting that a significant portion of the workforce may actively consider a change as they begin the new year.

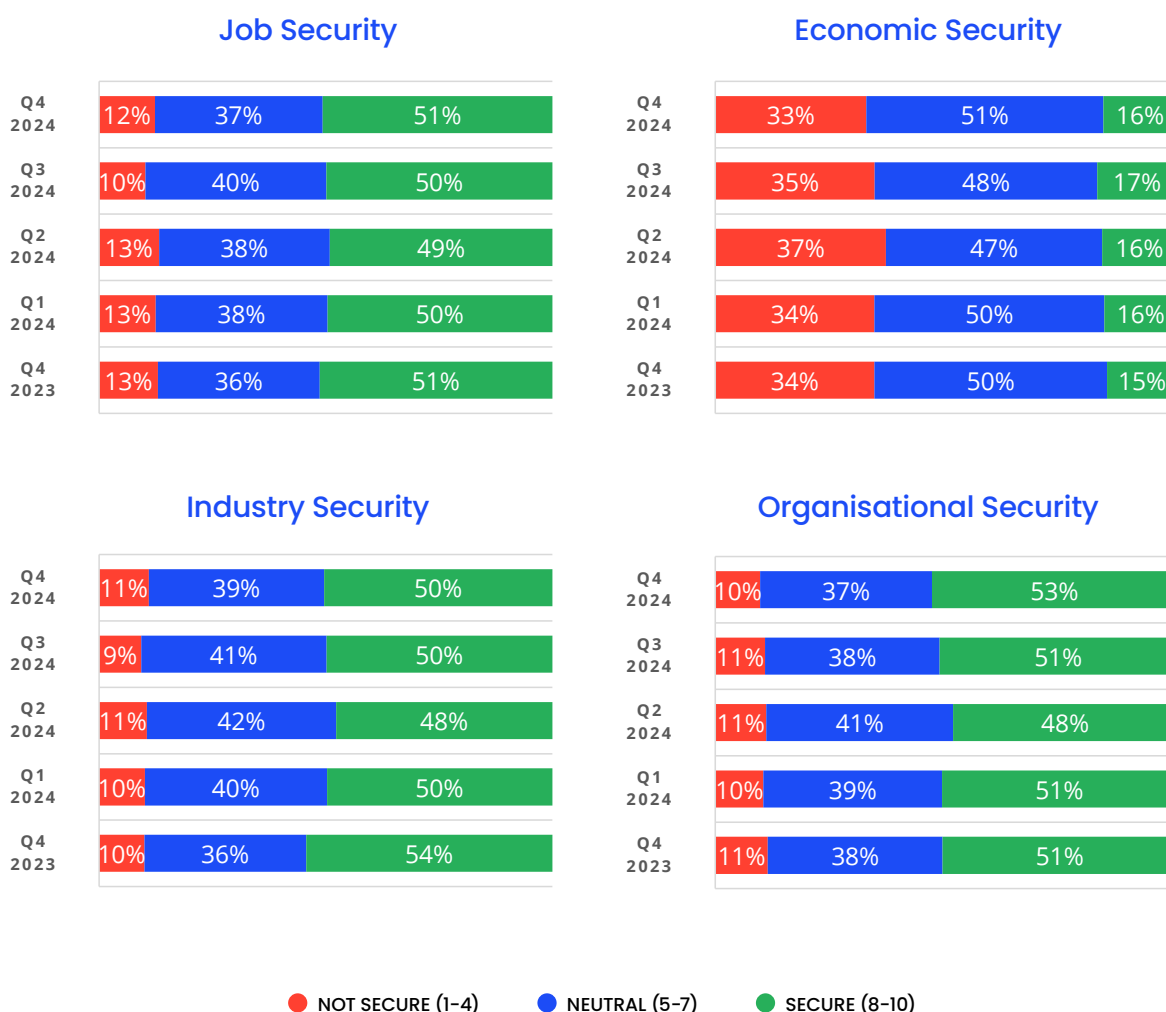


Perceived Security

Australian employees' perceptions of security across all elements have largely remained stable. However, perception of organisational security has increased to a peak of 53%. This is a five-percentage point increase since Q2 (48%) when perceived security was at its lowest.

Job security has increased slightly from last quarter and has returned to the same level as it was this time last year (51%). The number of employees who believe their industry is secure has remained stable over the last two quarters (50%), however, is still four percentage points down on this time last year (54%).

Although the proportion of employees who believe the economy is secure has slightly decreased since Q3 (Q4 2024: 16% vs Q3 2024: 17%), there has been a shift toward employees viewing the economy as neutral rather than insecure (Q4 2024: not secure 33%, neutral 51%; vs Q3 2024: not secure 35%, neutral 48%).



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 Q4 2024 (n= 1,021) // Q3 2024 (n=1,031) // Q2 2024 (n=1,038) // Q1 2024 (n=1,025) // Q4 2023 (n=1,022)



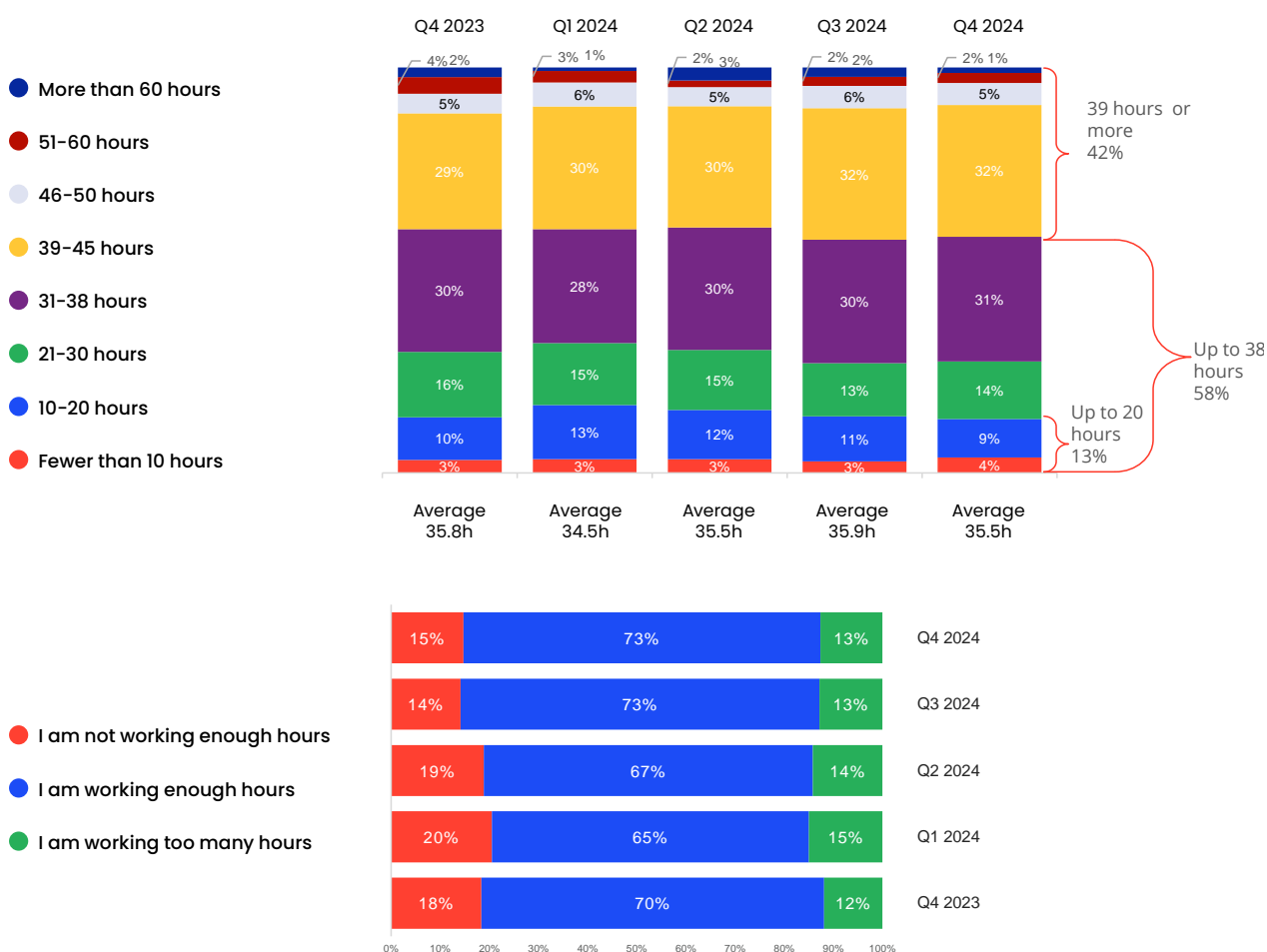
Hours Worked

The average number of hours worked each week has remained relatively stable from Q3 to Q4 (Q4 2024 35.5h; vs Q3 2024 35.9h).

Over two in five (42%) employees say they work 39 or more hours a week, with a third (32%) working between 39–45 hours.

Millennials and male employees continue to work the most hours each week on average (Males: 37.9h vs Females: 32.9h, Millennials: 36.9h vs Gen Z: 35.6h, Gen X: 35.5h, Baby Boomers: 25.2h).

The number of employees who feel they're working enough hours has remained the same from Q3 to Q4. Of those who are not working enough hours, almost a third are part-time (30%) or casual (32%) employees.



Q1. Over the last three months, on average how many hours do you work per week?

Q2. Over the past three months (April to June 2024), which of the following statements best applies to you regarding the hours you worked? Consider your cost of living and your ability to meet those needs based on the number of hours you work.

Australian Workers Q4 2023 (n=1,021) // Q3 2024 (n=1,031) // Q2 2024 (n=1,038) // Q1 2024 (n=1,025) // Q4 2023 (n=1,022)

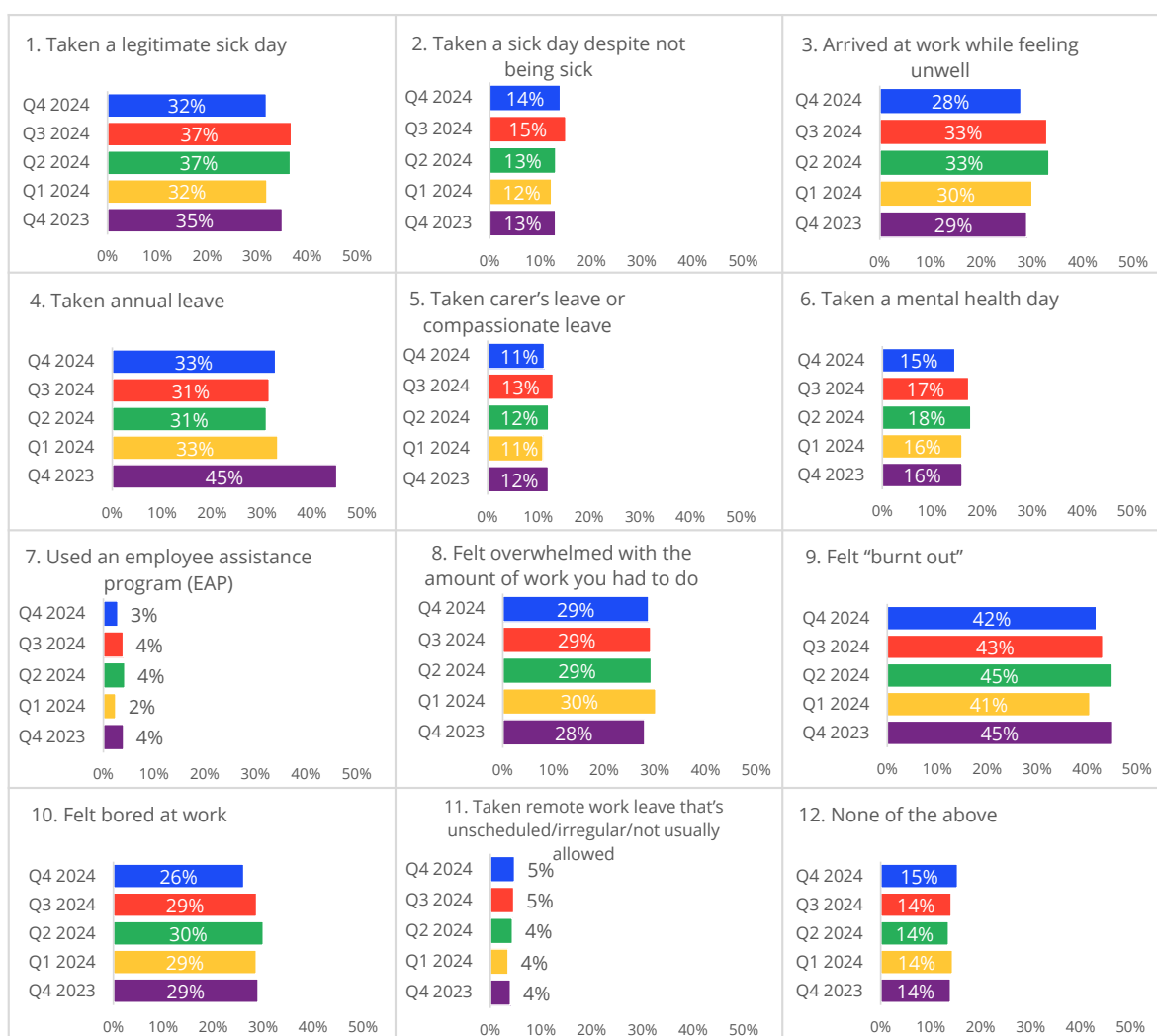


Employee Wellbeing

There have been some key changes between Q3 and Q4 2024 in terms of worker wellbeing, as well as changes over the last 12 months. Most notably would be the number of employees who have taken annual leave. In 2023, it was close to half (45%), and this year it's a third (33%), which continues the trend of employees taking less leave. [See Employee Sentiment Index: Q3 2024](#).

When considering overall employee wellbeing, it's interesting to note a significant decrease in both legitimate sick days (from 37% to 32%) and workers arriving at work feeling unwell (from 33% to 28%) over the past three months. This could indicate that employees are feeling healthier. With fewer employees experiencing illness severe enough to require time off or affect their ability to work, this points to potential improvements in overall wellbeing.

This is supported by burnout levels which decreased again this quarter (from 43% to 42%) and down three percentage points from this time last year (Q4 2023 45%).



Q3. Over the past three months have you...? Australian Workers Q4 2024 (n=1,021) // Q3 2024 (n=1,031) // Q2 2024 (n=1,038) // Q1 2024 (n=1,025) // Q4 2023 (n=1,022) *indicative only due to low sample size



Employee Mobility

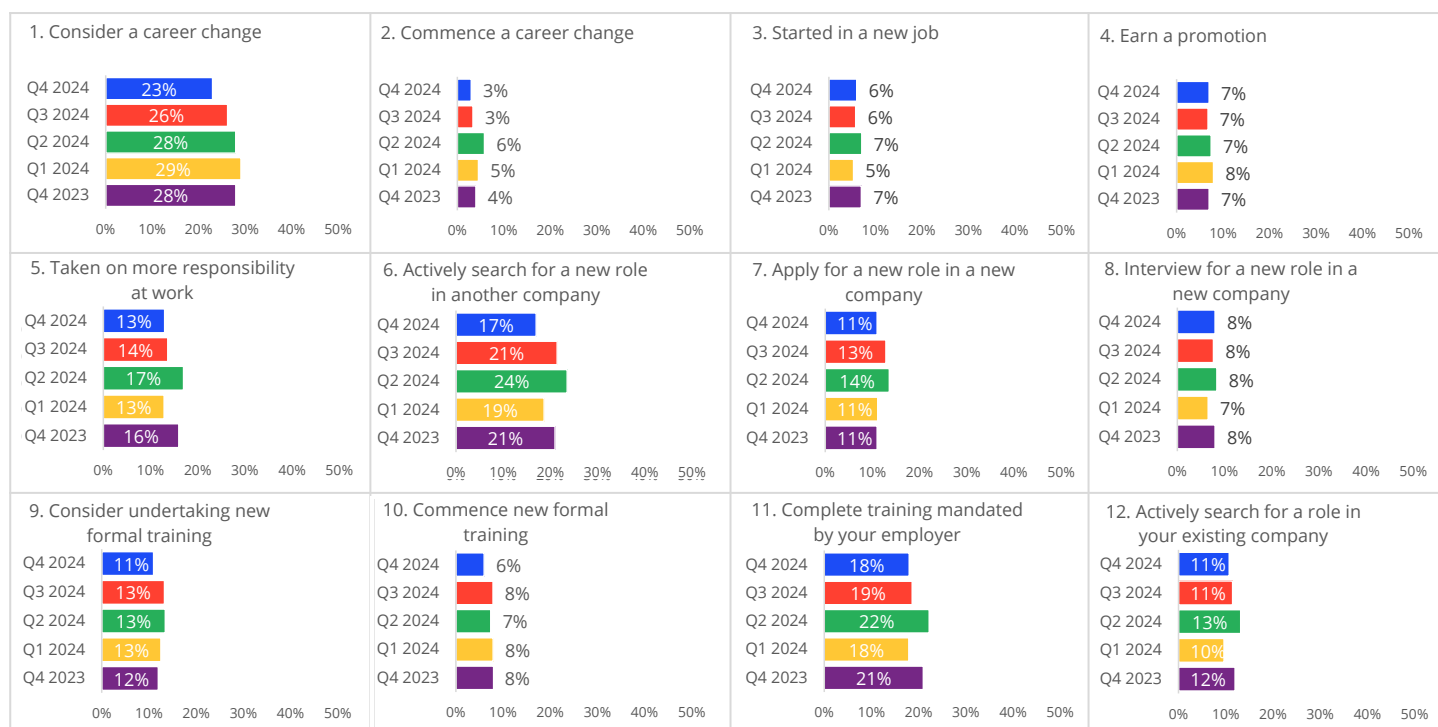
Employee mobility continues to decrease or remain stable this quarter. Employees who have done the following have all decreased since Q3 2024:

- Considered a career change (23%; vs Q3 2024 26%)
- Actively searched for a new role in another company (17%; vs Q3 2024 21%)
- Applied for a new role in a new company (11%; vs Q3 2024 13%)

It will be interesting to see what Q1 2025 shows, as last year's data indicates an increase in movement during the first quarter, which aligns with our current finding that 65% of Australian employees believe the start of the new year is a good time to look for a new job.

Gen Z continues to be the most mobile compared to other generations.

- Earned a promotion (Gen Z 16% vs Millennials 8%, Gen X 3%, Baby Boomers 0% and National Average 7%).
- Applied for a new role in a new company (Gen Z 17%; vs Millennials 11%, Gen X 7%, Baby Boomers 3%, National Average 11%).
- Interviewed for a new role in a new company (Gen Z 15%; vs Millennials 9%, Gen X 4%, Baby Boomers 2%, National Average 8%).



Q6. In the past three months, did you...? Australian Workers Q4 2024 (n=1,021) // Q3 2024 (n=1,031) // Q2 2024 (n=1,038) // Q1 2024 (n=1,025) // Q4 2023 (n=1,022)

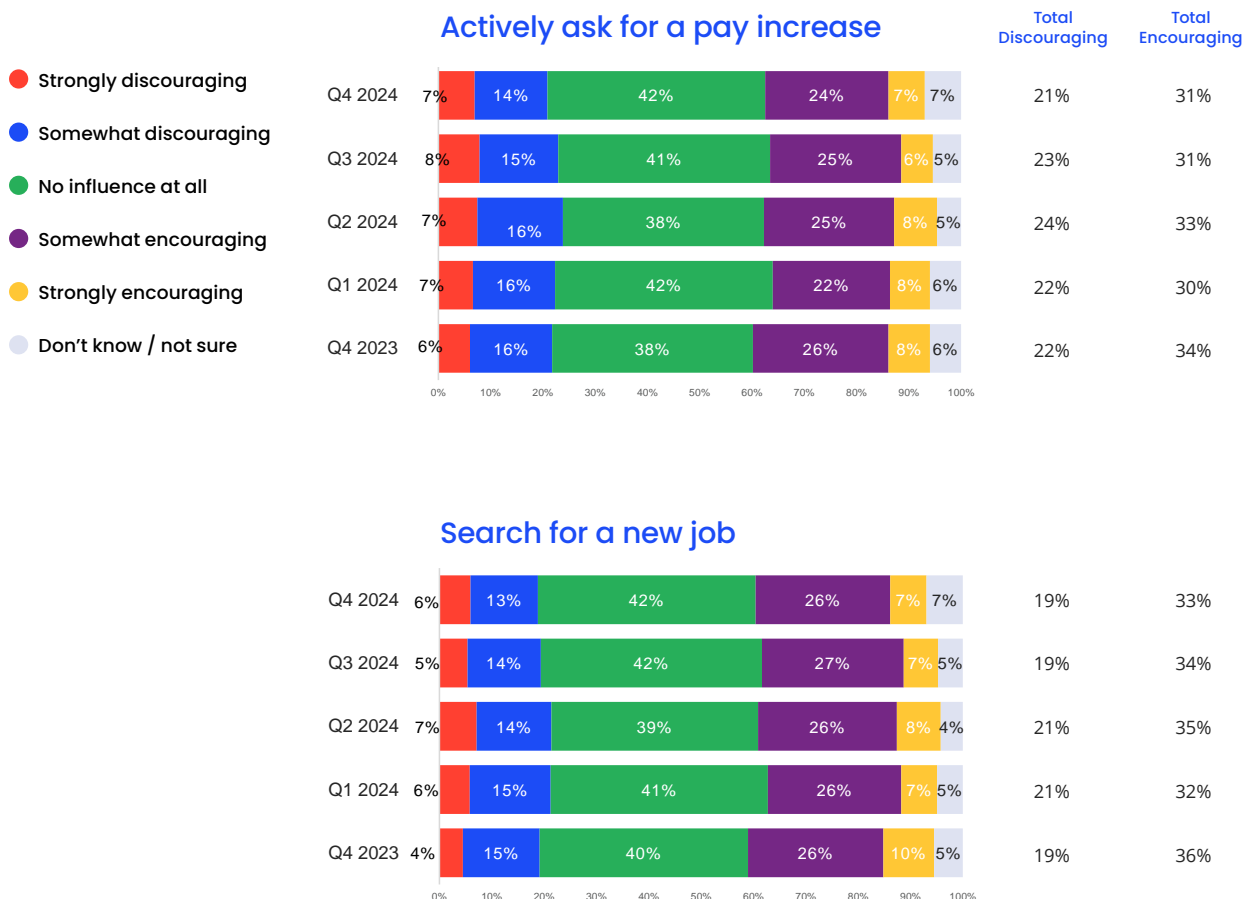
Economy Influencing Decision-Making

Sentiment has remained stable from Q3 to Q4 with close to a third (31%) of Australian employees feeling encouraged to actively ask for a pay rise based on the current economic conditions.

Gen Z employees are more likely to be encouraged (Gen Z 43%; vs Millennials 36%, Gen X 22%, Baby Boomers 3%) while older generations are less likely to be influenced by the economy (Gen X 50%, Baby Boomers 64%; vs Gen Z 29%, Millennials 35%).

A third (33%) of employees feel encouraged to search for a new job, which is slightly lower than last quarter (Q3 2024: 34%) and this time last year (Q4 2023: 36%).

Gen Z is also the most encouraged group to search for a new job (44%, compared to 39% for Millennials, 24% for Gen X, and 6% for Baby Boomers).



Q10. To what extent are current economic conditions encouraging or discouraging you to do the following? Australian Workers Q4 2024 (1,021) // Q3 2024 (n=1,031) // Q2 2024 (n=1,038) // Q1 2024 (n=1,025) // Q4 2023 (n=1,022)



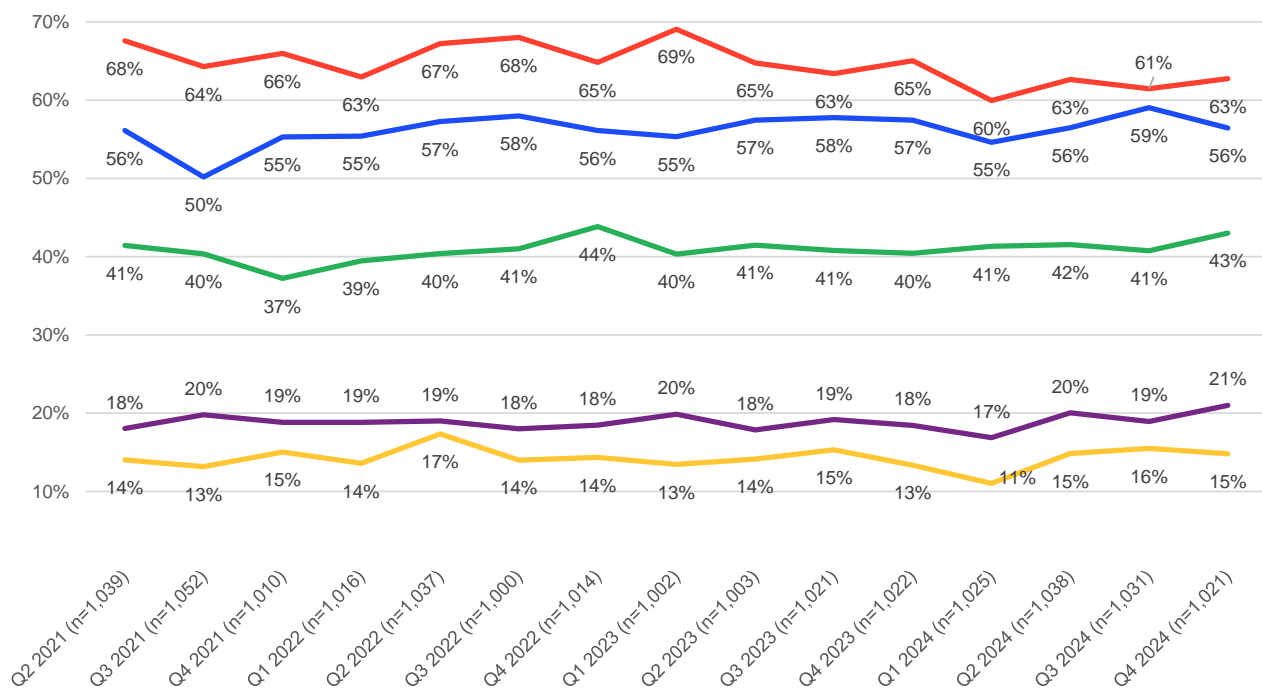
Future of Work

Since Q3, there have been slight changes among all future of work metrics. The most noteworthy change is the decrease of three percentage points in the number of employees who believe their skill set is specialised and hard to replace (Q4 2024: 56%; vs Q3 2024: 59%).

Employees who feel technology will assist them in their role has returned to the same level as Q2 2024 (63%), but still hasn't recovered from its peak in 2023.

The number of employees who believe their role will be offshored in the next 5 years has remained stable in the last quarter. However, the belief that their role will be automated in the next 5 years has reached a new peak of just over 21% (compared to Q3 2024: 19%).

The number of employees who believe their industry is prone to job losses has increased by two percentage points (43%; vs Q3 2024 41%) remaining just under the peak it was two years ago (44%).



Agree and Strongly Agree

- Greater technology will assist me in my role
- My skill set is specialised and hard to replace
- My industry is prone to job losses
- My role will be automated in next 5 years
- My role will be offshored in next 5 years

Q5. To what extent do you agree or disagree with each of the following statements? Australian Workers



Employee Priorities

Remuneration, flexible or remote working, organisational stability, and the commute to work, are all key priorities that have remained relatively unchanged across the last three quarters. The stability of an organisation has returned to second, which it hasn't been since this same time last year (and conversely flexible/remote working is back to third which it hasn't been since this time last year).

The culture of an organisation and career development and professional learning opportunities remain stable this quarter compared to last (5th, 6th, and 7th respectively).

Diversity amongst the senior team and online or employee reviews have both fallen to the bottom of the priority list (previously 7th in Q3 2024).

| | Q4 2024 | Q3 2024 | Q2 2024 | Q1 2024 | Q4 2023 |
|--|---------|----------|----------|----------|----------|
| Remuneration and bonus payments / incentives | 1st | 1st | 1st | 1st | 1st |
| Stability of an organisation | 2nd | Tied 3rd | Tied 3rd | 3rd | 2nd |
| Flexible/Remote working | 3rd | 2nd | 2nd | 2nd | 3rd |
| Easy and/or short commute | 4th | Tied 3rd | Tied 3rd | 4th | Tied 4th |
| Culture of the organisation | 5th | 5th | Tied 3rd | 5th | Tied 4th |
| Career development opportunities | 6th | 6th | Tied 6th | 6th | 6th |
| Professional learning opportunities | 7th | Tied 7th | Tied 8th | Tied 7th | 7th |
| The ethical standing/reputation of the organisation and leadership | 8th | Tied 7th | Tied 8th | Tied 7th | 8th |
| Wellbeing initiatives | 9th | 11th | 11th | 10th | 9th |
| Diversity among employees/senior leadership team of the organisation | 10th | Tied 7th | 10th | 11th | 10th |
| Online or word-of-mouth employee reviews of the leadership | 11th | Tied 7th | Tied 6th | Tied 7th | 11th |

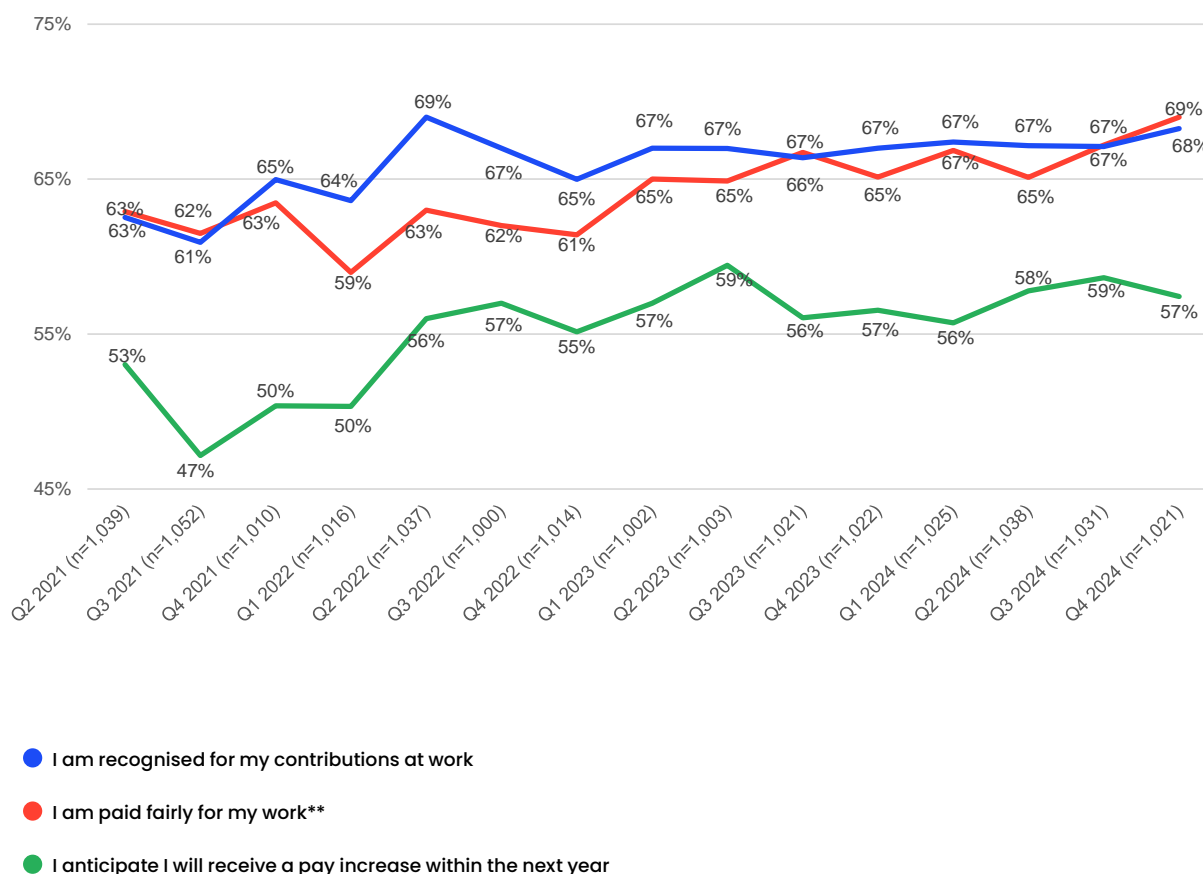


Recognition and Remuneration

Most Australian employees continue to believe they're recognised for their contributions at work, increasing to 68% this quarter (compared to Q3 2024: 67%). While this belief is still most widely held by Baby Boomers (85%) it has increased by 5 percentage points for Gen Z (67%, compared to Q3 2024: 62%).

The number of Australians who believe they're paid fairly for their work has also continued to increase, reaching a new peak of 69% – a four percentage point increase since last year (65%) and an eight percentage point increase over the last two years (61%).

The number of employees who anticipate a pay increase within the next year has decreased slightly (57%) returning to the same level as this time last year. Male employees continue to anticipate a pay increase within the next year (64%; compared to female 51%).



Q7. To what extent do you agree or disagree with each of the following statements? Australian Workers

Note: Code frame reduced in Q1 2023

** Question text changed from "I am remunerated for my work fairly" to "I am paid fairly for my work" in Q1 2023

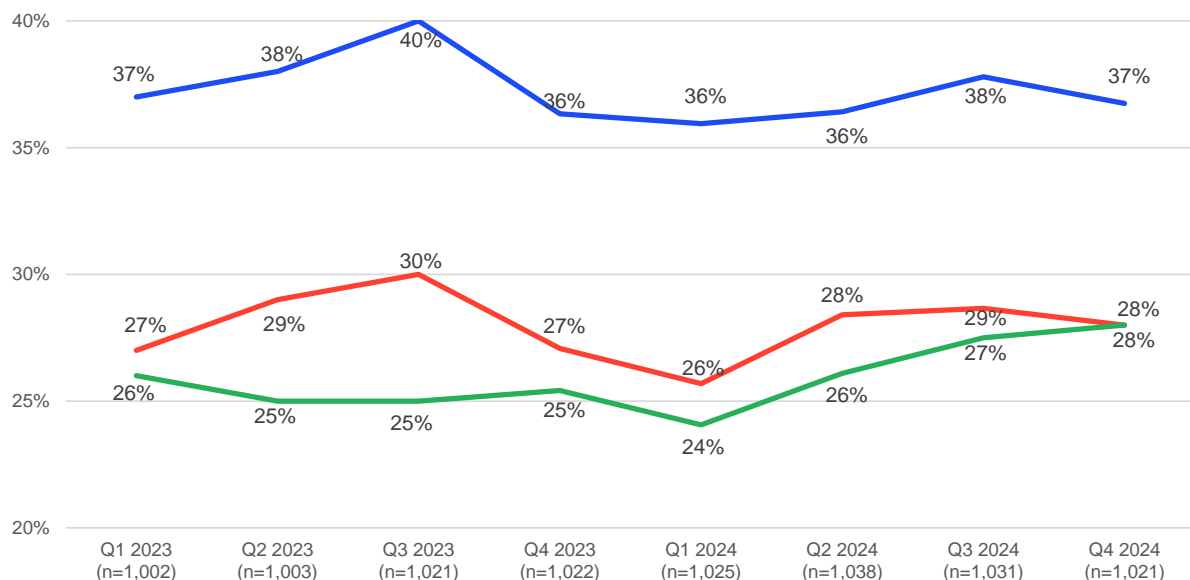


Job Safety and Redundancies

Australian employees feel less pressure to work longer or harder hours to keep their jobs safe (37% in Q4 2024, compared to 38% in Q3 2024). Gen Z employees are more likely to feel this way, with 49% reporting this sentiment, compared to 40% of Millennials, 29% of Gen X, and 17% of Baby Boomers.

The number of employees who anticipate redundancies in their workplace over the next three months decreased slightly this quarter (Q4 2024: 28%; compared to Q3 2024: 29%). However, the same number of employees feel concerned that their role will be made redundant (28%).

Gen Z drives both these sentiments, with 37% anticipating redundancies and 38% concerned it will be their role.



- I feel I need to work harder/longer hours to keep my job safe
- I anticipate there will be redundancies in my workplace in the next three months
- I am concerned my role will be made redundant

Q7. To what extent do you agree or disagree with each of the following statements? Australian Workers

Note: Code frame reduced in Q1 2023

* Indicative only due to small sample size



Trending Concerns

The job recruitment process



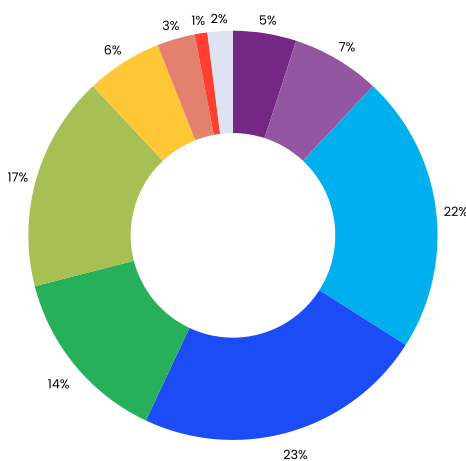


The Onboarding & Recruitment Process

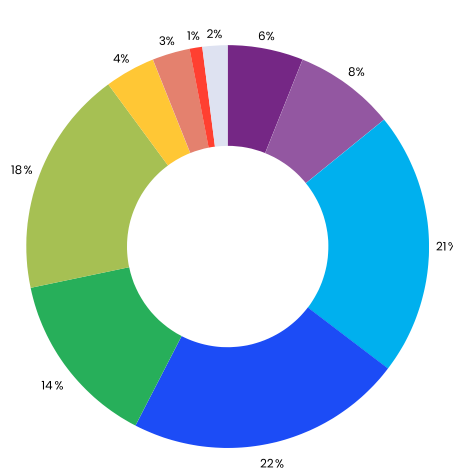
Over a third of Australian employees felt their last overall recruitment process was good (34%). This is heavily influenced by Baby Boomers (44%, compared to Gen X: 33%, Millennials: 32%, and Gen Z: 38%). While 54% of employees rate it as neutral, one in eight (12%) would rate their recruitment experience as bad, which is almost 1.4 million Australian employees.

There are similar results for the interview and onboarding process, with 35% and 31% of employees rating it as excellent respectively. However, over 1.5 million employees would consider their interview and onboarding experience as bad.

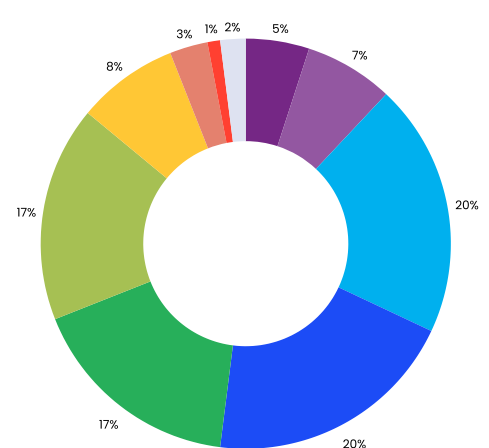
| | Recruitment Process Overall | Interview Process | Onboarding Process |
|---------------|-----------------------------|-------------------|--------------------|
| Good (8-10) | 34% | 35% | 31% |
| Neutral (5-7) | 54% | 54% | 55% |
| Bad (1-4) | 12% | 11% | 14% |



Recruitment Process Overall



Interview Process



Onboarding Process

10 - Amazing 9 8 7 6 5 4 3 2 1 - Terrible

B1. Thinking about your most recent job appointment, on a scale of 1 to 10, (1 being terrible, 10 being amazing) how would you rate your overall experience and the specific aspects below? Australian Workers (n= 1,021)



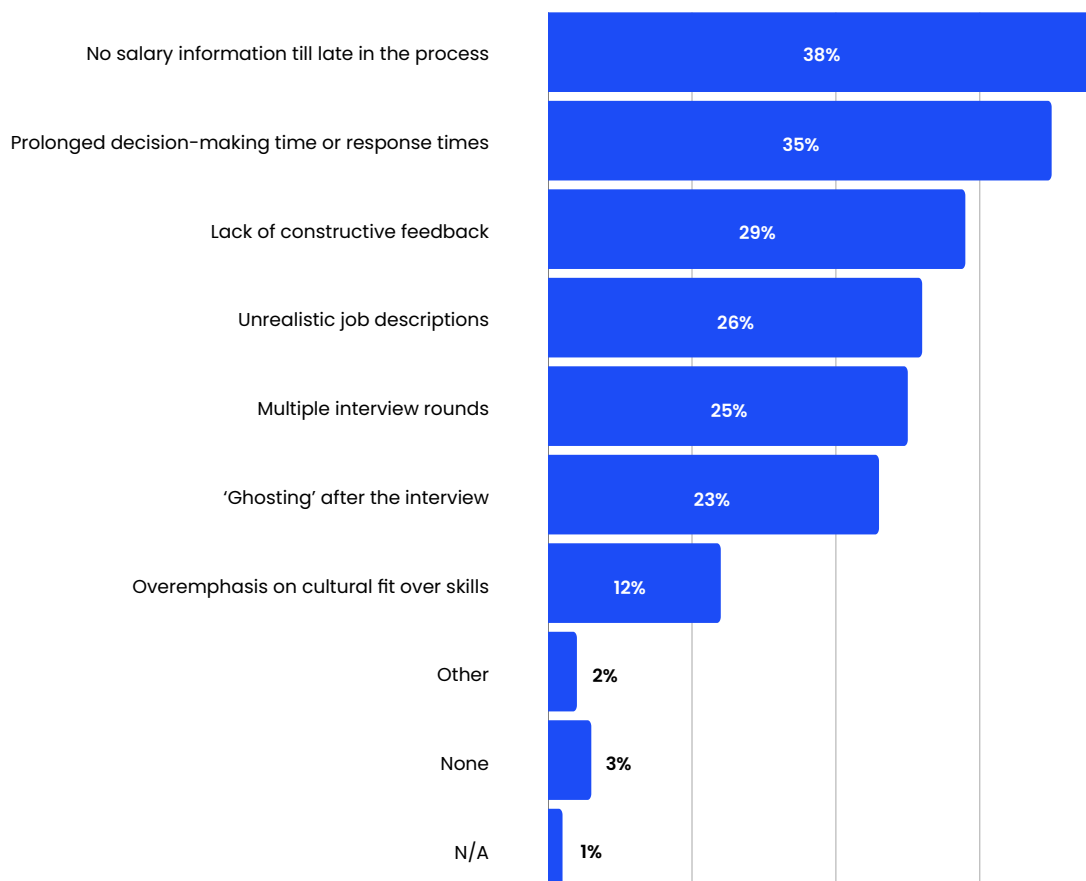
Frustrations Within The Recruitment Process

Nearly 40% of Australian employees identify the lack of salary information until late in the recruitment process as one of the most frustrating aspects. Notably, female workers are more likely to express this frustration (41%) compared to their male counterparts (36%).

Over a third (35%) say prolonged decision-making time or response times is one of the most frustrating aspects while three in ten (29%) say it's a lack of constructive feedback.

A quarter of employees see unrealistic job descriptions (26%) and multiple interview rounds (25%) as some of the most frustrating elements of the recruitment process, while slightly less say it's being 'ghosted' after the interview (23%).

Significantly lower than the rest is an overemphasis on cultural fit over skills with 12% finding this the most frustrating aspect.



B2. Thinking back to your last few job searches, what aspect of the recruitment process did you find most frustrating? Australian Workers (n= 1,021)



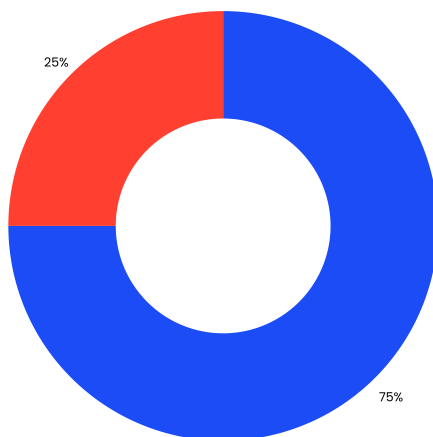
New Year, New Employee?

One in four (25%) Australian employees don't think they're in the right role, suggesting that a significant portion of the workforce may be actively considering a change as they begin the new year. Younger generations are more likely to be dissatisfied, with 28% of Gen Z and 28% of Millennials reporting dissatisfaction, compared to 21% of Gen X and 15% of Baby Boomers.

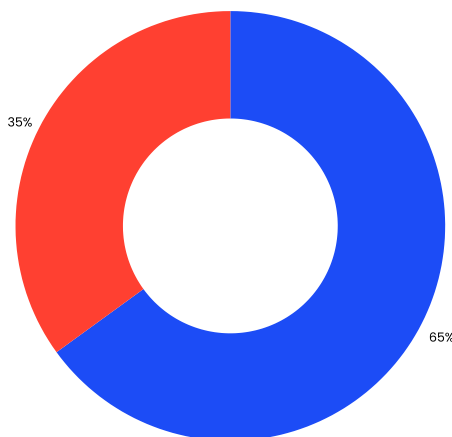
Almost two-thirds (65%) believe the start of the year is a good time to look for a new job.

41% say they've been successfully head-hunted for a role. This increases to just over 60% (62%) for employees in the finance industry and employees who hold senior management positions (64%).

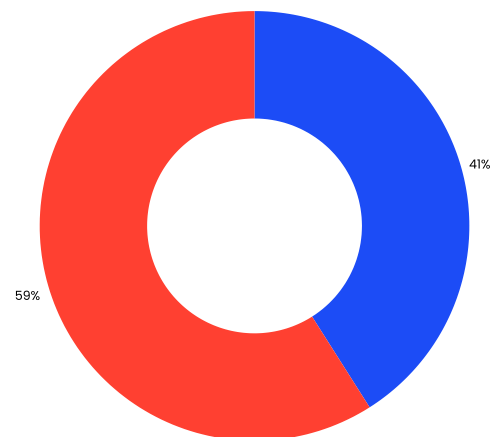
Do you believe you are currently in the right role for you?



Do you think the start of the year is a good time to look for a new job?



Have you ever successfully got a role after being head hunted (i.e. approached to fill a position, rather than applied for the job)?



● Yes ● No

B3. Please answer yes or no to the following questions. Australian Workers (n= 1,021)



What makes the new year a good (or bad) time to look for a new job?

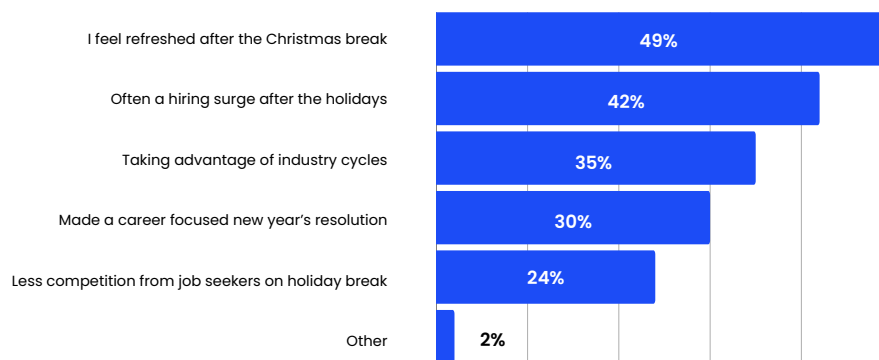
Almost half of Australian employees who think the new year is a good time to look for a job believe it's because they feel refreshed after the Christmas break.

42% of those say there is often a hiring surge after the holidays and just over a third (35%) say they can take advantage of industry cycles.

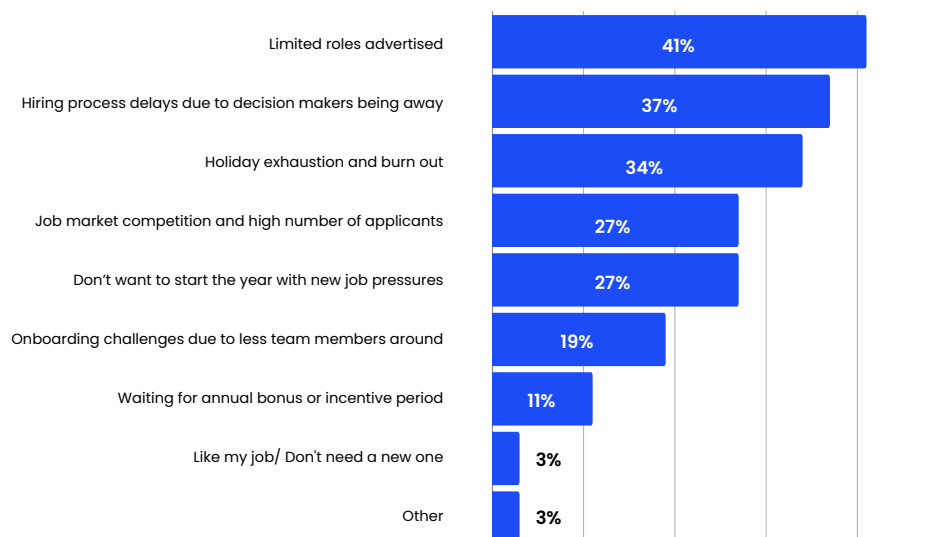
On the other hand, 41% of respondents believe that the new year is a bad time to look for a job due to the limited number of roles advertised. Employees in the accommodation and food services (57%), manufacturing (40%), and information media and telecommunications (61%) industries are more likely to hold this view.

At least a third of employees believe that hiring processes are delayed due to decision-makers being away (37%) and holiday exhaustion and burnout (35%), making the start of the year an unfavorable time to search for a job.

Why the start of the year is a good time to look



Why the start of the year is a bad time to look



B3. Please answer yes or no to the following questions. Australian Workers (n= 1,021)

RELEASING HR'S FULL POTENTIAL

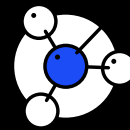
The **only** HR platform that truly fits the needs of mid-sized businesses in Australia and New Zealand, without the unnecessary complexity.



Onboarding



Recruitment



HR Core



Payroll &
Remuneration



Performance
Management



Learning
Management

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With a comprehensive suite of ISO-certified solutions that span the full employee lifecycle, ELMO Software is designed to scale as organisations grow. Flexible and configurable, ELMO's one-stop HRIS fits to your specific needs and workflows.

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