



**Frontline
Feel Good
Index 2022**



An exclusive report across Australia and New Zealand
into what makes people Feel Good At Work

Feel Good Index



**Frontline
Recruitment**

July 2022

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Introduction

For most of us, work represents a huge part of our existence. This is precisely why we have again invested in running the Feel Good Index research first launched in 2021. Our mission was clear and simple: understand what makes people in Australia and New Zealand feel good at work.

In 2022 we are operating in a time of high employment and finding employees has become increasingly challenging. Knowing what will attract and retain employees is critical. Understanding that by sector and generation is even more important

Our report takes on some of the big hot topics and challenges the status quo, as we explore some of the challenges around people and engagement. Does money really matter as much as we think? Is Australia and New Zealand going to experience this so-called 'Great Resignation'? Can a culture really make or break a company? And why is everyone talking about purpose and values so much these days?

These are challenging times for everyone, but right now the pendulum has well and truly swung in favour of employees, and they expect more than ever before and those companies that accept this and act upon it, will have a greater chance of success in the future. The time we are now living in is a time when workers are eager to make connections at work, to do work they feel good about, to make a difference and to be alongside like-minded people feeling like they are being supported every step of the way. Therefore, there is enormous pressure as well as expectation, that



businesses whether big or small, local or global, must step up and rise to the challenge. For this to work, they are going to need to stop and take stock, ask questions and listen carefully, throw away old ways of doing things, start with blank canvases, think outside the box and put the most creative and innovative people in a room to figure out how they can be everything that employees are looking for, because when that partnership, that bond, is tightly joined, there is no end to the incredible success that can be achieved. But there is so much to learn and do before any of this can happen, and our research findings will hopefully provide enough insight to help both jobseekers and employers take positive steps forward.

Arthur McColl
CEO

About the Survey



1063
respondents

This year marks the second year that The Frontline Feel Good Index research study has been conducted. Similar to last year, over one thousand online surveys were completed (n=1063) across Australia and New Zealand throughout April and May 2022. Participants were recruited from a variety of sources and comprised mostly of jobseekers (62%) as well as employers (38%). The survey covered all kinds of work-related questions as well as core classification questions so that we would be able to cut the data in different ways.



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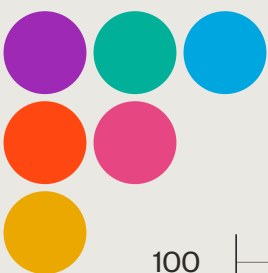


So How Good Are People Feeling About Their Job

Employees in AU and NZ are feeling more positive about their job than the same time last year. With 80% saying they either love or like their job compared with 73% in 2021.

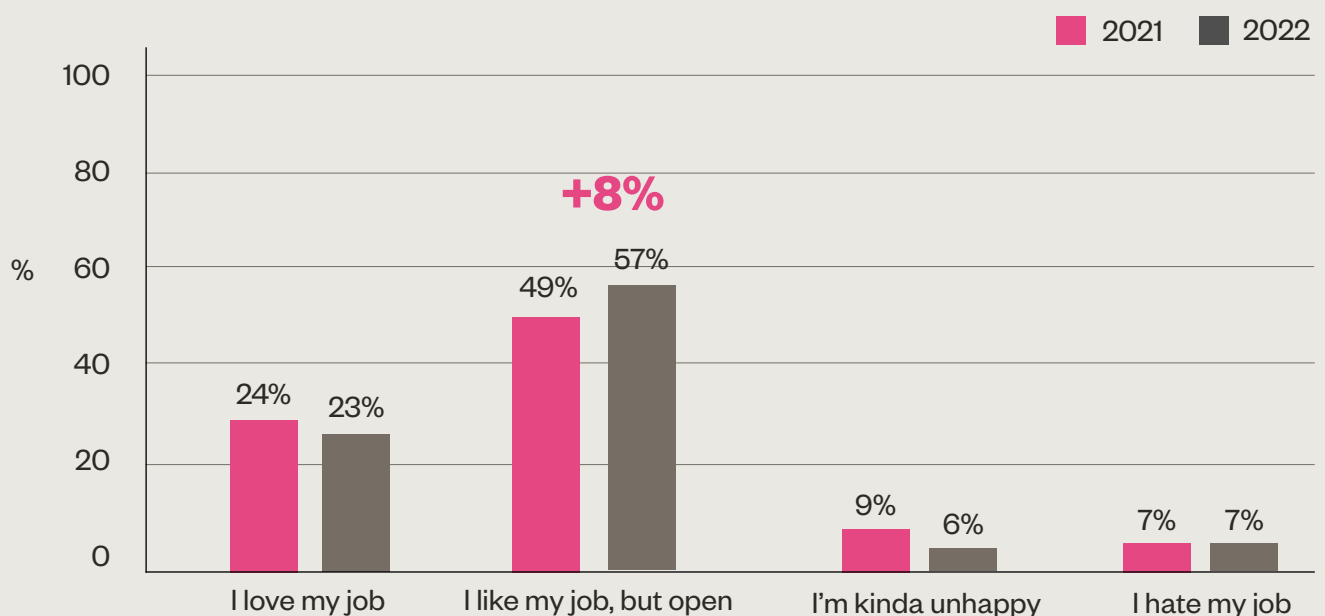
However, we're seeing an increase in people who are open to changing jobs: 57% of respondents said that even though they liked their job, they were open to something better. This is up from 49% in 2021.

There were many expected as well as surprise learnings that came out of the research this year, but before we dive into the main findings, here are just a few of the big-picture insights that emerged:



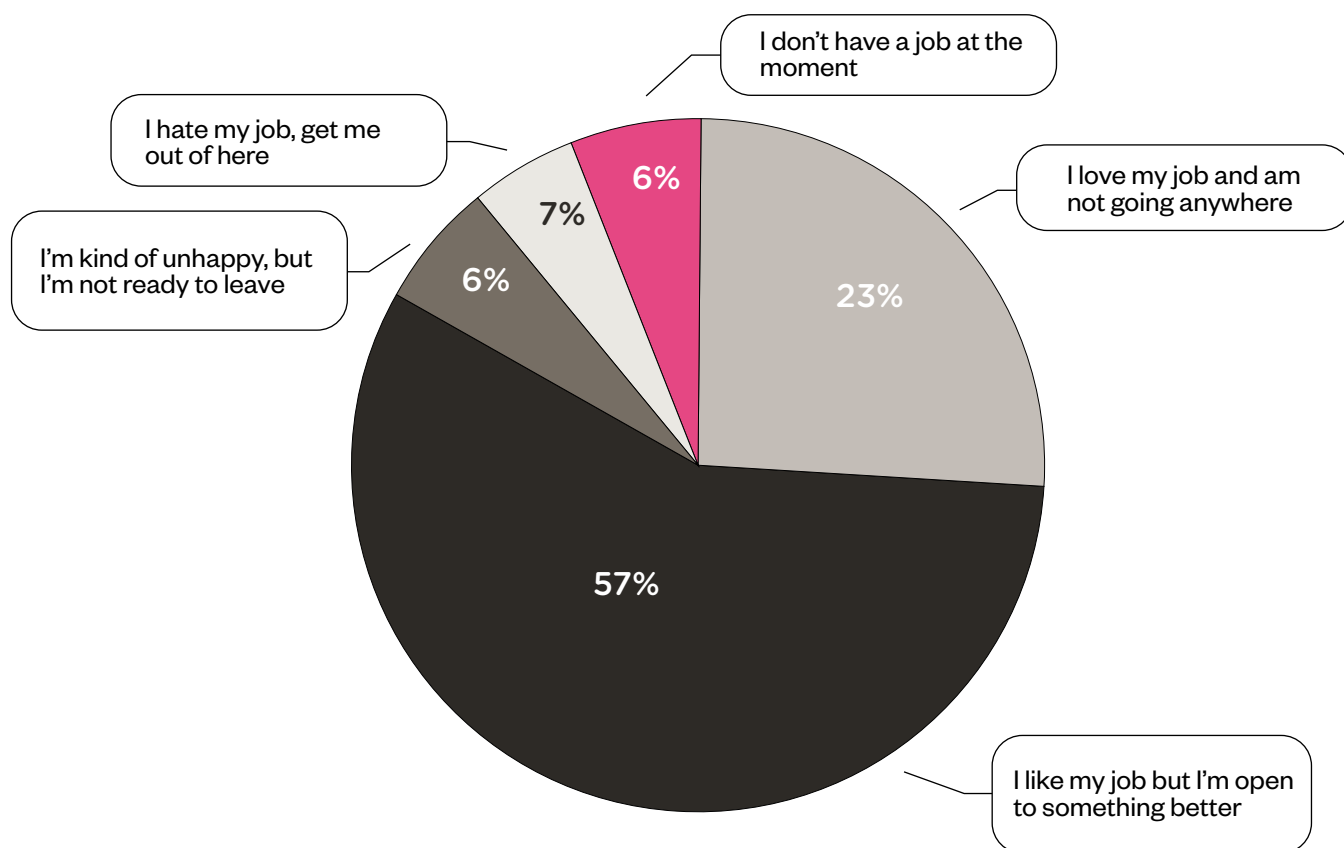
Still positive, but now more 'available'

Which of the following best describes how you feel about your job?

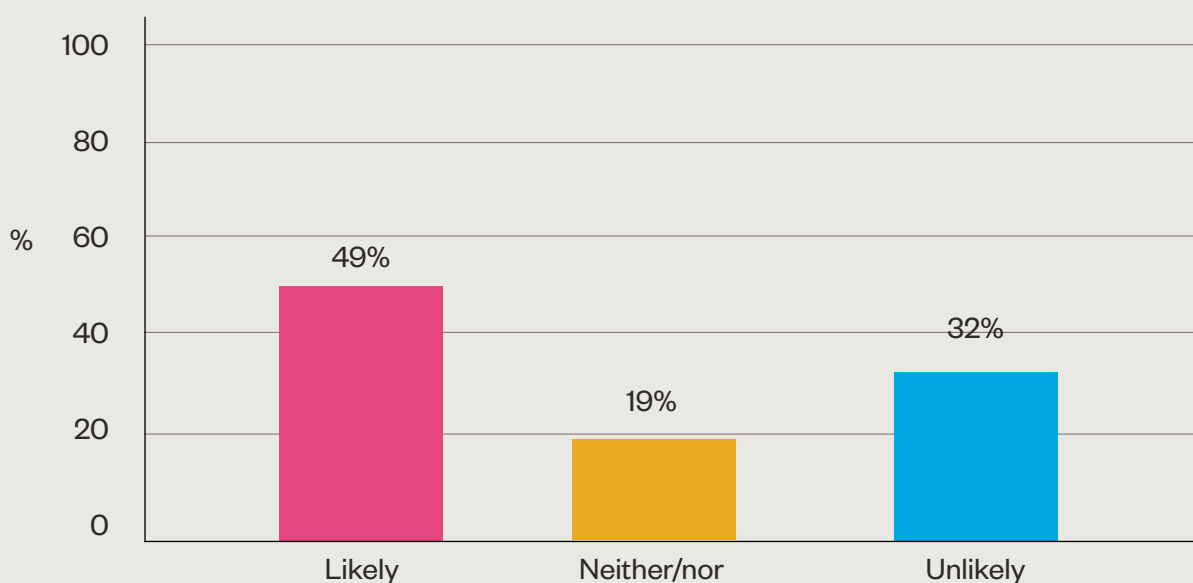


Who loves their job the most?

Healthcare employees remain the most positive about their job this year, the only difference being there has been a slight drop off in those that 'love' their job (down 4% from 2021) and a corresponding increase in the number that say they 'like' their job but they are open to something better (up 8% from 2021).



How likely is it that people will quit their job?



49% of employees anticipate changing roles in the next 12 months, this has increased 8% from 2021 where job security was a top priority.

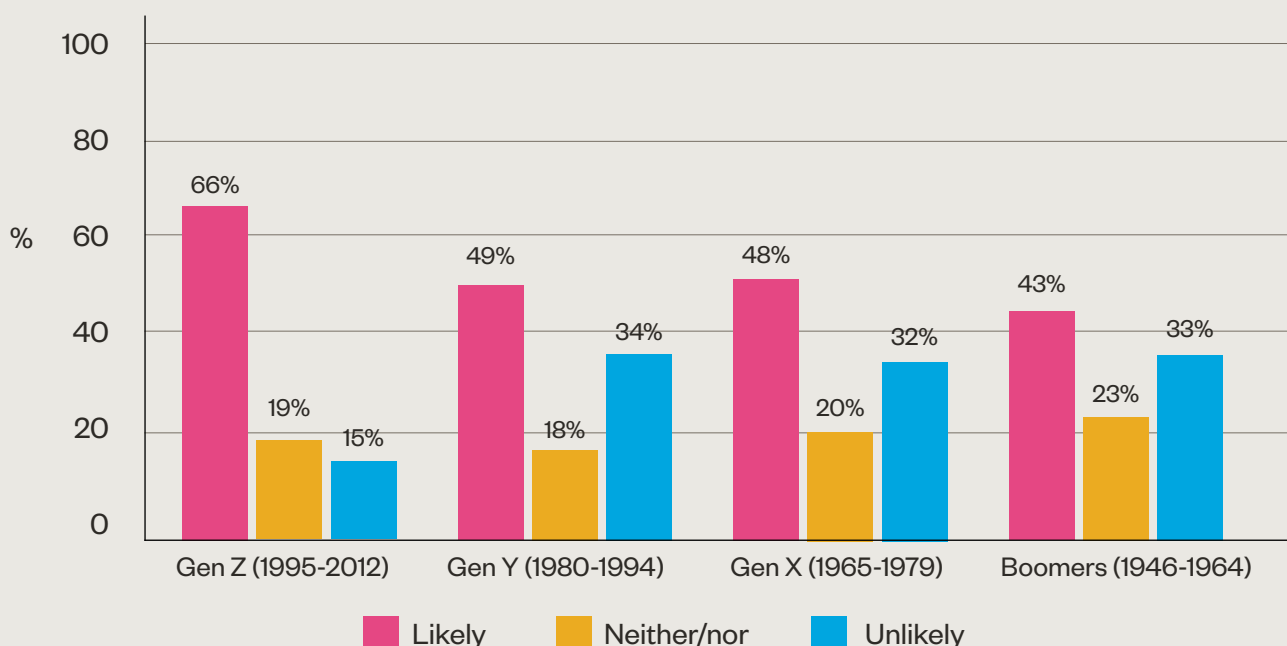


The Great Resignation ... or rather, 'The Ongoing Resignation'

Our research has identified an interesting shift in dynamics compared with last year when it comes to the talent sector overall. As can be seen from the data from the employers who participated in the research, it seems there is a slight sense of relief when it comes to attracting talent ('difficult' recruitment of talent decreases by 13 percent, whereas 'difficult' retention of talent increases by 10%).

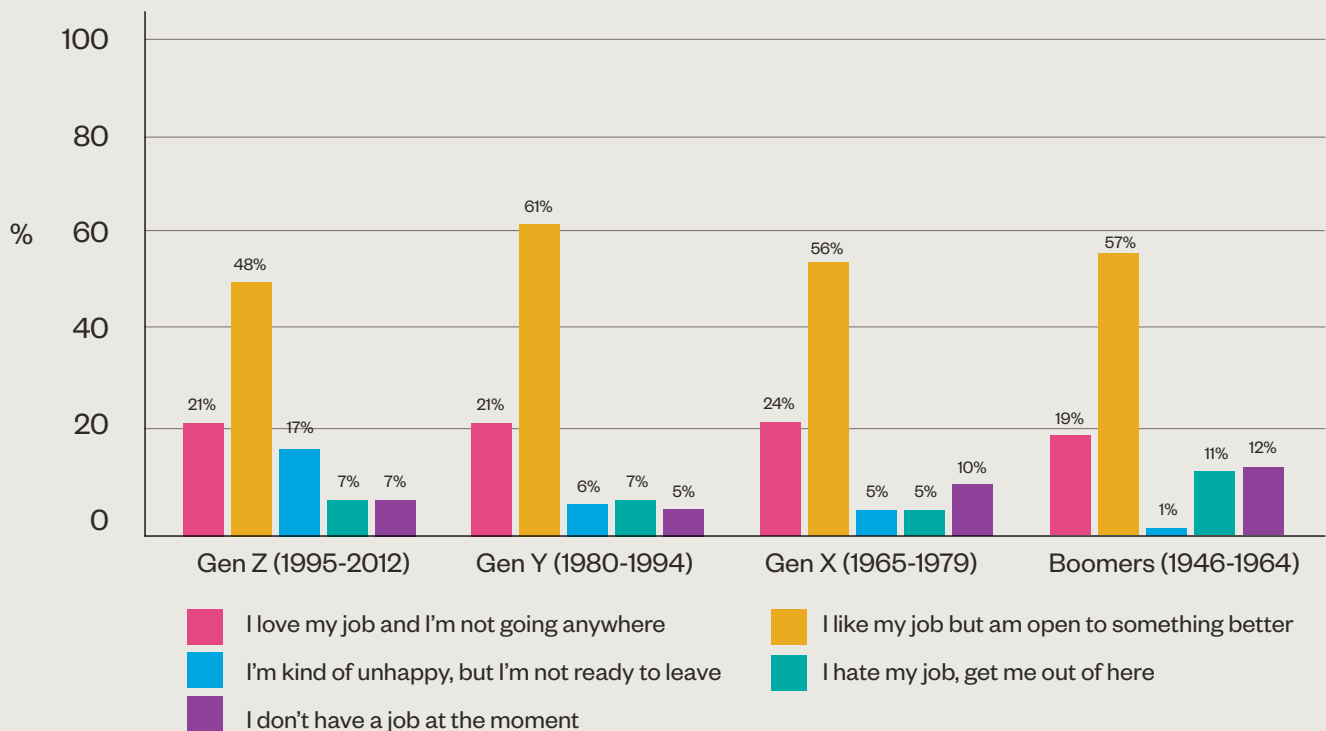
It is likely that this 'movement' of labour over the coming months will happen and will continue to happen, so maybe we should refer to it more as The Ongoing Resignation. Over the next 12 months, it is by far the younger generations that are the most likely to leave their jobs. That said, across all generations we could expect to see up to half of all workers leave their jobs in the coming months.

Staying or leaving across generations



Compared to last year the youngest Generation (Gen Z) indicate they are the most likely to change roles in the next 12 months when Baby Boomers indicated they would be the most likely to leave. Stickiness now appears to decline the younger the employee.

Job sentiment across generations



Gen X reports feeling the most positive about their job, a change from last year, where Baby Boomers reported being the most positive.

Impact on Wellbeing Across Generations

Another 12 months of life living with Covid has taken its toll on virtually everyone but in particular, the younger generations seem to have suffered the most when it comes to physical and mental wellbeing. Aside from the financial strains, and professional hurdles not to mention the social repercussions, we wanted to understand how they were emotionally coping and to what extent it appeared to have had a negative impact on their mental health.

As can be seen by Box 1, when we asked all jobseekers how they are feeling about work, it becomes abundantly clear who is struggling the most whether that be due to workload stress, being overwhelmed by the pressure of work, or feeling burnt-out compared to last year or knowing there is someone they can talk to about their mental health at work:

	Gen Z	Gen Y	Gen X	Boomer
Stressed	○	●	●	○
Burnt Out	●	○	○	●
Overwhelmed	○	●	○	●
Talk Mental Health	○	●	●	○

Box 1

● Most ○ Second ○ Third ● Least

What are people saying about what makes them feel good at work?

...vs what employers are prioritising.

Box 2:

EMPLOYEES		EMPLOYERS
In 2022...		
1st	Leadership	N/A
2nd	Learning	1st
3rd	Wellbeing	4th
3rd	Collaboration	N/A
4th	Autonomy	7th
5th	Flexibility	3rd
5th	Tasks	N/A
6th	Location	N/A
7th	Inclusivity	8th
8th	Comms/Strategy	2nd
9th	Technology	6th
10th	Perks	7th

The candidate and employer disconnect

It is often the case, that what jobseekers say they want compared with what organisations are offering, are not as perfectly aligned as you would expect. In fact, sometimes they are poles apart. Findings from our research shows that even more than last year, there is an apparent disconnect between what jobseekers tell us are important priorities compared with what employers tell us they have been implementing and doing over the last 12 months.

In many cases, it is not that much of a serious issue, but when it comes to those aspects which are ranked in the top 5 by jobseekers and yet ranked near the bottom by employers, that is when work needs to be done to better align expectations across both parties. Interestingly, a couple of factors they seem to have relative agreement on include learning and development and inclusivity.

As we will see later in the report, particular attention needs to be paid to wellbeing, leadership, and flexibility as each one of these has powerful leverage when it comes to jobseekers and how good they feel at work. Senior management should not fall into the trap of being comforted by a false sense of security if workers appear engaged, as this is not a reliable indicator of their commitment to stay.



What are the different generations saying about what makes them feel good at work?



Boomers (1946-1964)

Boomers unsurprisingly rank location with slightly more importance and are still keen to keep up with technology and they also want to continue learning.



Gen X (1965-1979)

Wellbeing and working autonomously rank highest for Gen X and they have a higher priority placed on technology than other generations.



Gen Y (1980-1994)

There is not much that separates Gen Y from Gen Z, but they do appear to rank technology as a higher priority and location slightly more important.



Gen Z (1995-2012)

Learning is the most important priority for Gen Z this year which is central to their DNA, closely followed by wellbeing and leadership style.



There were a number of priorities that all generations noted as important, including learning, leadership, wellbeing and working collaboratively and autonomously.

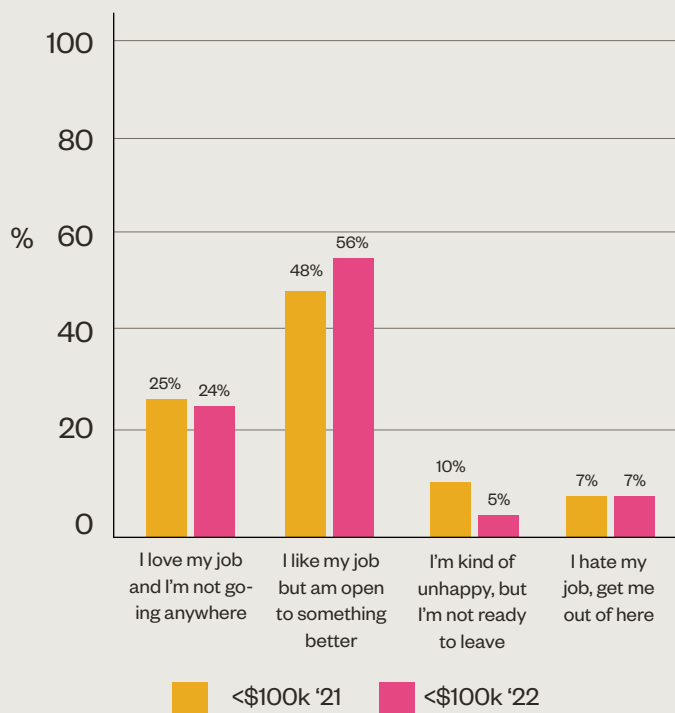


What impact does salary have?

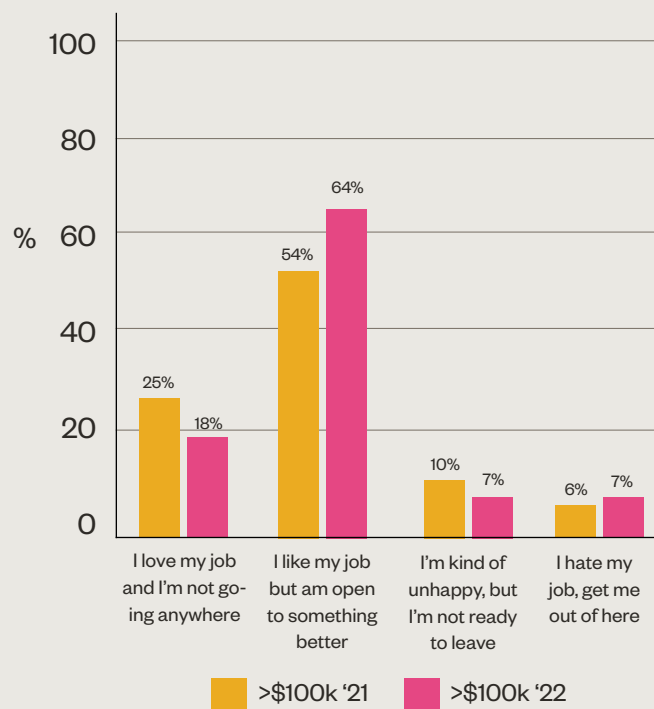
It is often the case, that what jobseekers say they want compared with what organisations are offering, are not as perfectly aligned as you would expect. In fact, sometimes they are poles apart. Across all salaries there has been an increase in an openness to change roles in 22 vs 21. Those most likely to be open to changing jobs are higher salary earners (over \$100k) which is consistent with the 2021 Feel Good Index data.

In many cases, it is not that much of a serious issue, but when it comes to those aspects which are ranked in the top 5 by jobseekers and yet ranked near the bottom by employers, that is when work needs to be done to better align expectations across both parties. Interestingly, a couple of factors they seem to have relative agreement on include learning and development and inclusivity.

Under \$100k 2021 versus 2022

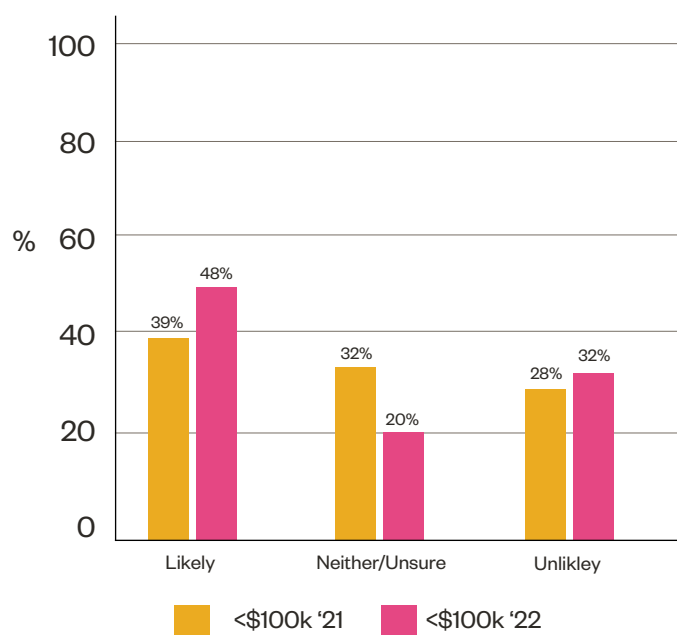


Over \$100k 2021 versus 2022

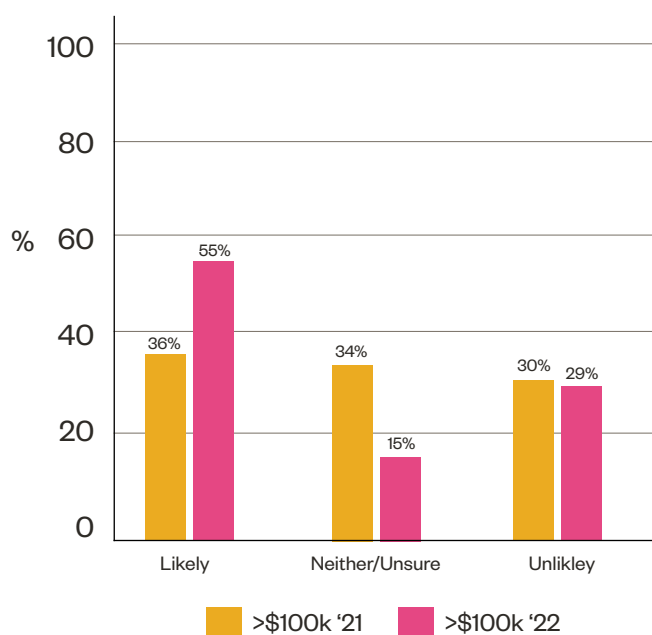


Likely to leave in next 12 months

Under \$100k 2021 versus 2022



Over \$100k 2021 versus 2022

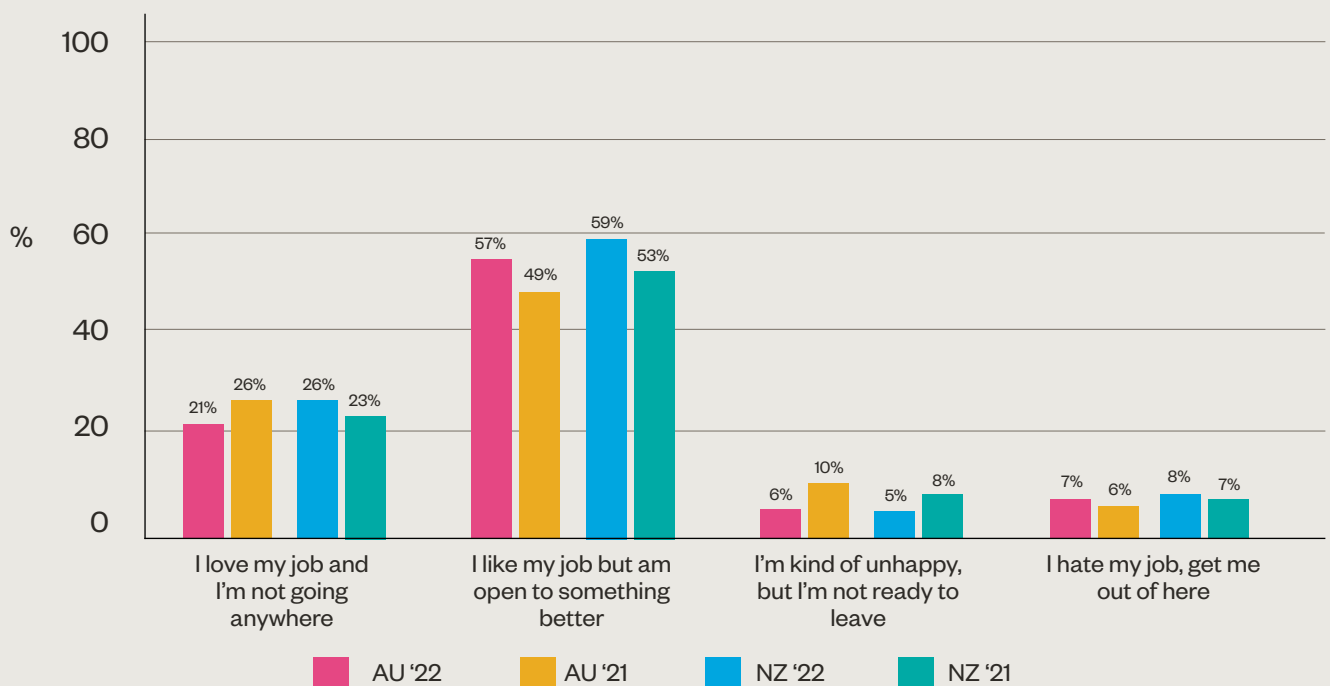


How do Kiwi's and Aussies differ

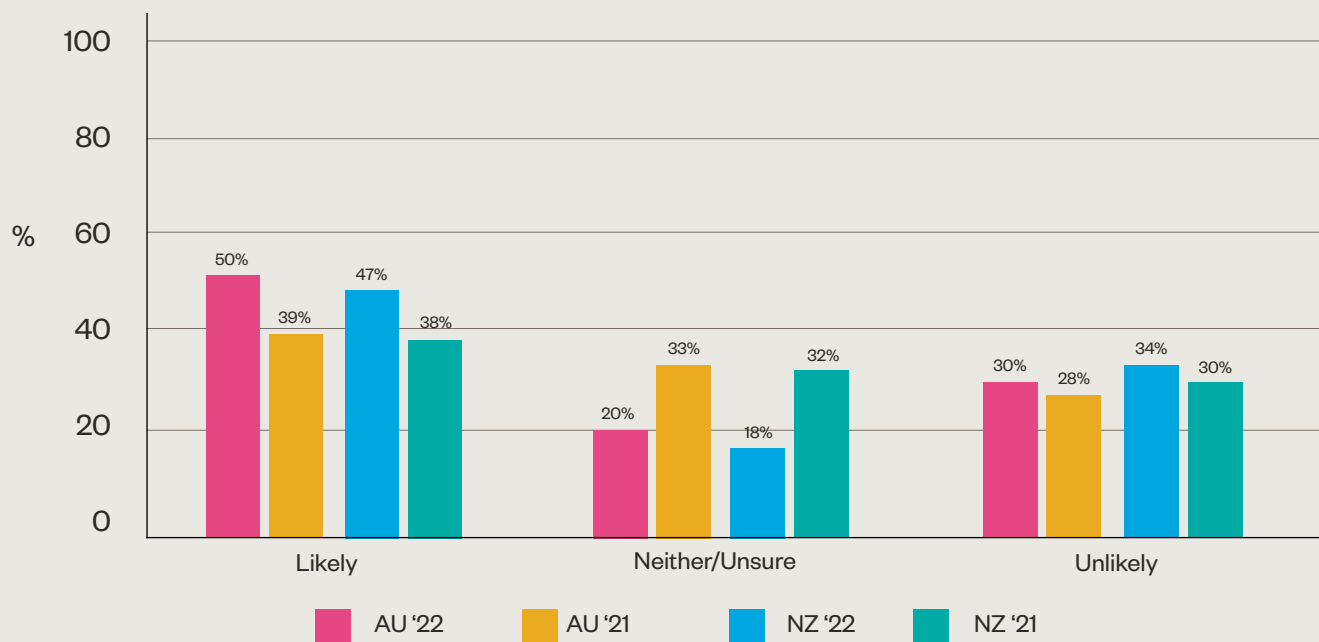


Across most of the data both countries are relatively aligned, that said, we did uncover a few small nuances which paints a picture of how 'work' is unfolding for each nation.

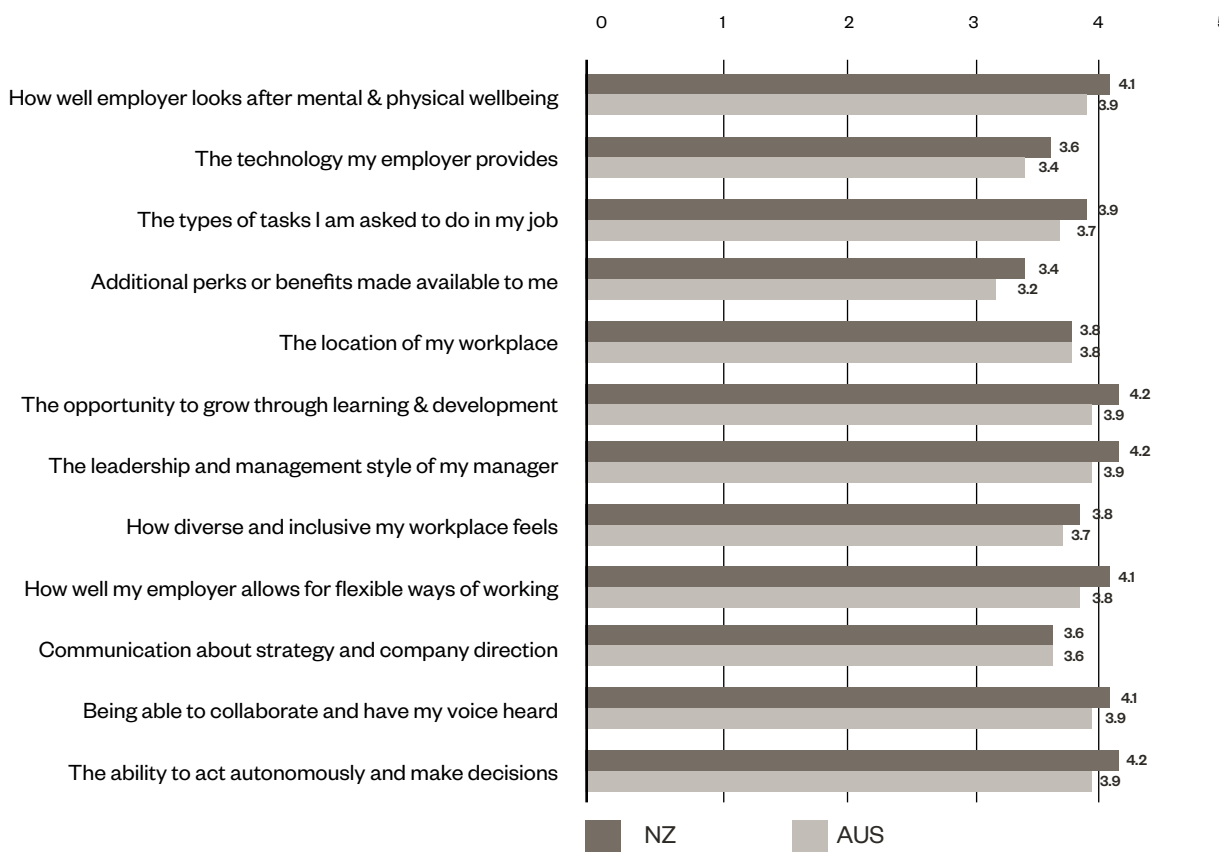
While Australia sees little change at the overall positive mindset level (directional decline in number of people saying they 'love' their job), across the water is a very different scenario: a lot more people in 2022 are positive about their job, helped by a marginal increase of 3pts of those who 'love' it.



When it comes to security at work and who's staying or tempted to jump ship; both countries look to be behaving in virtually the same manner, albeit slightly worse case in Australia with an increase of 11pts, now half of those working say they are likely to leave their job in the next 12 months.



When it comes to priorities, once again we see very similar results across both countries, where the top 5 factors important to Aussies and Kiwi's are identical, albeit in a slightly different rank order, notably: leadership, learning, autonomy, wellbeing and collaboration. Both markets also rank perks/benefits as having the least priority.



Key Insights

Shi{f}t Happens

There have been many shifts taking place over the last 12 months, some more detrimental than others and some more isolated. However, some of the biggest shifts we are seeing in our 2022 data fall into three distinct areas:

Shift in Talent Focus

There is no denying, there are a multitude of challenges facing those in the business of talent management, but our research has identified a shift in perspective this year. From those in positions of hiring staff (whether internally or externally), their collective voice reveals how they make a distinction between recruitment and retention. Year on year, as can be seen in the data in Box 5, it suggests that recruitment has become less challenging (not necessarily easier); whereas on the other hand, retention has become more difficult.



Impact on Talent Market Changing

Thinking about the last 12 months, how has your experience been when it comes to recruitment/retention?



There could be a number of forces at play here, for example the sheer rise in number of potential applicants impacting ease of recruitment vs the short-termism view, younger generations have of jobs means they are much harder to try and convince to stay with one company.

Priorities are Shifting

At the heart of our study, lies a question which specifically relates to what jobseekers believe is important and therefore what priority they place on aspects relating to work.

	2022		2021
↑	1st	Leadership	4th
=	2nd	Learning	2nd
↑	3rd	Wellbeing	6th
↑	3rd	Collaboration	4th
↓	4th	Autonomy	1st
↑	5th	Flexibility	7th
=	5th	Tasks	5th
↓	6th	Location	7th
↑	7th	Inclusivity	3rd
↓	8th	Comms/Strategy	9th
↑	9th	Technology	8th
=	10th	Perks	10th

What is clear from this list, is that jobseekers are reacting to their own experiences in their own lives and so we see (new entrant) leadership taking first position as their top priority; wellbeing moves up, flexibility drops in the ranking but still remains an important priority and despite seeing the biggest increase year-on-year, perks remains at the bottom of the priority pecking order.



Jobseekers are hungry to feel informed

When you think about work, which of the following statements are important for you

Communication about company and strategic direction

2021 ★★★★★ 3.6/5 2022 ★★★★★ 3.0/5



Insights

Companies need to acknowledge the importance of their purpose and what is behind their values, failing to do so could risk losing talented workers who are unable to align themselves.

The Stretch in Your Flex



Employers should re-think flexibility

When you think about work, which of the following statements are important to you?
Over the past 12 months which of the following has your employer initiated?

EMPLOYEES

How well my employer allows for flexible ways of working:



One of the biggest increases YOY and now ranked as the 3rd most important priority...

EMPLOYERS

	2021	2022
Flexible hours	59%	50%
Flexible Workplace	46%	38%

... whereas employers have de-prioritised flexibility initiatives compared with 12 months ago



Insights

Allowing jobseekers to work in the way they prefer and where is the bare minimum when it comes to what level of flexibility organisations need to be prepared to offer in the future.

Time for a whole- istic approach



Employers need to step up their game

When you think about work, which of the following statements are important to you?
Over the past 12 months which of the following has your employer initiated?

EMPLOYEES

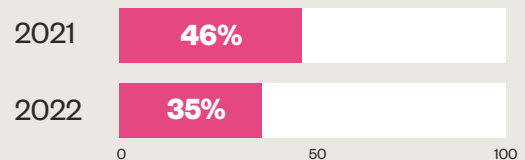
How well my employer looks after mental & physical wellbeing:



Another priority for jobseekers that has increased YOY is wellness, now ranked 2nd...

EMPLOYERS

Employer wellbeing programs (mental & physical)



... whereas employers this year place less emphasis on initiatives that relate to health and wellbeing



Insights

Companies need to urgently put wellness at the top of their agenda and find out what their workforce wants and then return with options that deliver on those needs.



Spotlight is now on the Leaders



Jobseekers want (more) strong leaders

When you think about work, which of the following statements are important to you?

The leadership and management style of my manager



Able to act autonomously and make decisions



Insights

Organisations need to invest the time and resources to better equip their leaders with the skills necessary to help employees get through their day as well as achieve results, once their time has been freed up by automation.



Money Matters



Focus on money and rewards

When you think about work, which of the following statements are important to you?
Over the past 12 months, which of the following has your employer initiated?

EMPLOYEES

Additional perks or benefits made available to me

2021 ★★☆☆☆ **2.1/5**

2022 ★★☆☆☆ **3.3/5**

Financials are important to Jobseekers but goes well beyond just their pay check each month...

EMPLOYERS

	2021	2022
Salary increases	30%	34%
Additional perks & benefits	27%	26%

... employers continue to use financial reward as bait but must watch they do not tip the balance



Insights

Salary increases are back on the table as perks compared with last year, not surprising given rising inflation and interest rates. However, it still motivates jobseekers less than other components of the package.



Learning to Learn Again



Encourage Lifelong Learning Mentality

When you think about work, which of the following statements are important to you?
Over the past 12 months which of the following has your employer initiated?

EMPLOYEES

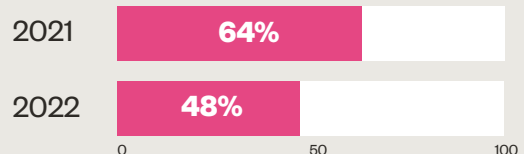
Grow through learning and development



Personal growth was already a priority for Jobseekers and becomes even more so this year...

EMPLOYERS

Learning and development



... last year employers also backed L&D but 2022 sees the 2nd largest decline in initiatives

Box 11



Insights

Opportunities for personal development via bespoke learning is a must for any organisation hoping to survive in the future, and the smart ones will ensure that it is facilitated by invisible and seamless technology.



The What and How Increasingly Important

When you think about work, which of the following statements are important to you?

The types of tasks I am asked to do in my job

2021 ★★★★★ 3.4/5

2022 ★★★★★ 3.8/5

Being able to collaborate and have my voice heard

2021 ★★★★★ 3.6/5

2022 ★★★★★ 4.0/5



Insights

Looking ahead it is going to be critical for organisations to start focussing less on roles and more on the jobs at work as well as the skills required to get those jobs done. What people do at work, how they do it and who with is fast becoming one of the key variables when job hunting so it is crucial that organisations quickly adapt and accommodate this new behaviour and they will likely see more success in their recruitment efforts.



Tech is Not The Hero, Just The Conduit



Tech is key but not a motivator

When you think about work, which of the following statements are important to you?
Over the past 12 months which of the following has your employer initiated?

EMPLOYEES

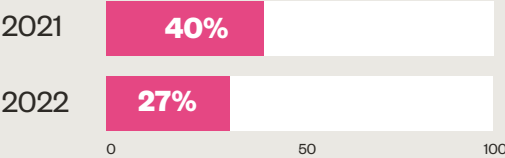
The technology my employer provides



Having the right technology to do their job optimally is still important...

EMPLOYERS

Improved technology



... so employers should not stop supporting this

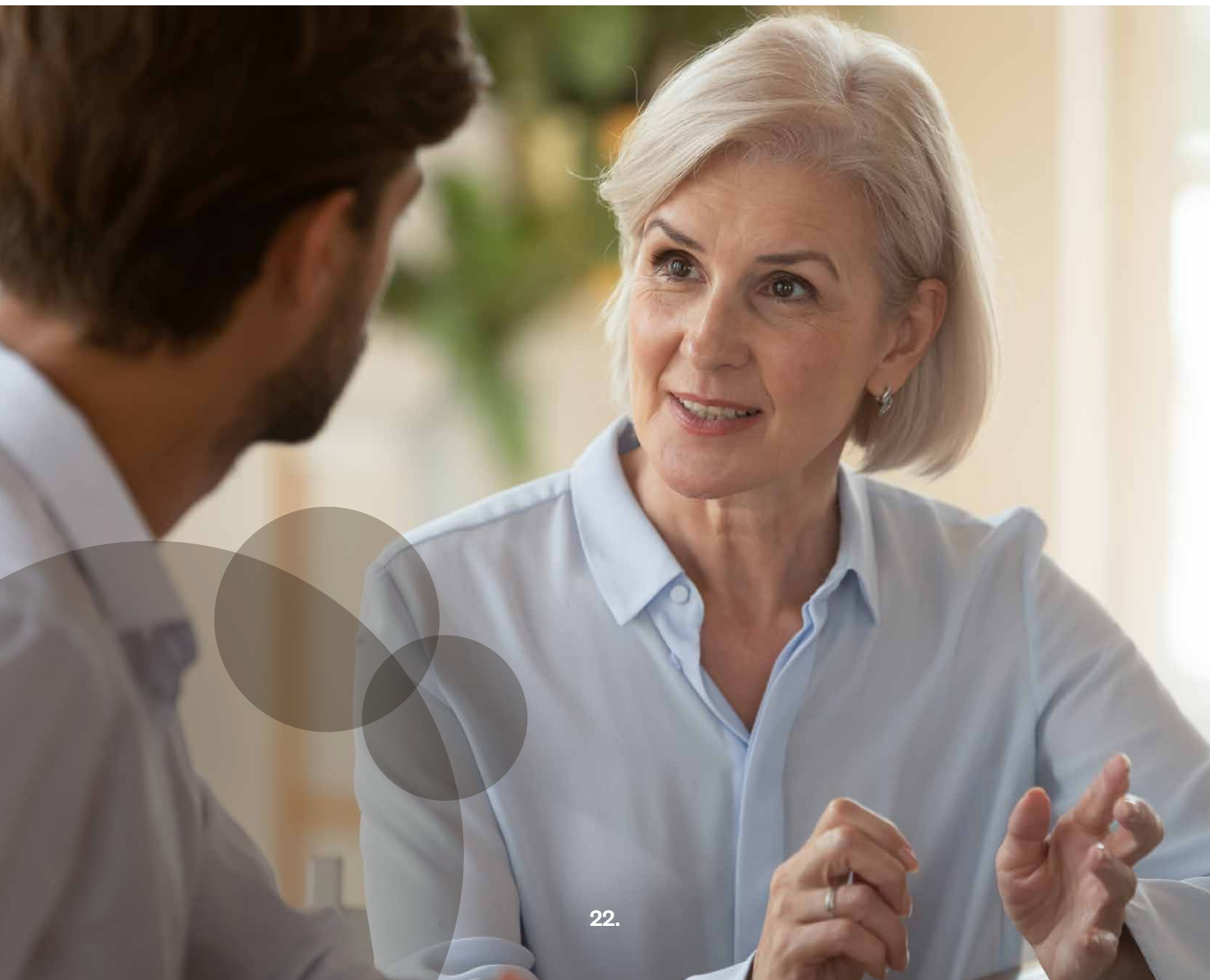


Insights

The data this year tells us that technology is still important to frontline jobseekers and has even seen a slight rise in their list of priorities but nevertheless it ranks relatively low compared to all other factors. Technology needs to be embraced with open arms and not in any way feared; that said, it should also not be held in such regard that it becomes the hero, it is merely the conduit to greater success

What employers are experiencing

One of the stand-out learnings from the 2022 data is that the gap between what employees want and what employers are offering, still exists and in some cases is getting bigger. There has never been a more important time for employers to engage with their staff to find out more about what it is they want to get out of work and then do something about trying to meet their needs. No longer are some of these demands 'nice-to-haves', they are becoming table stakes and imperatives to attracting and maintaining the best talent.



What now?

There is a lot to digest and get your head around, but after much deliberation, the team at Frontline have come up with a simple way of taking all the key findings out of the research and categorising into 3 groups: work, workers and workplaces. These are a mixture of important points to remember as well as key actions to consider whether you are an employee or employer. We sincerely hope any one of these points helps you on your career path and/or on your road to success:



Work:

- Remember, human first!
- Inspire (creative) ways of working
- Bring people together and collab
- Let tech do all the hard lifting (behind the scenes)



Workers:

- Stay ahead of the must-have skills and capabilities
- Provide varied learning opportunities
- Enable smooth workflows between human & tech
- Develop and nurture up and coming leaders
- Overhaul recruitment strategy (and process)



Workplaces:

- Create a space that everyone is proud to come to each day
- Involve a company-wide taskforce
- Provide different zones for different working-styles
- Embed 'wellness' into overall office design
- Let data guide decisions and test n learn where possible

Sector Reports

Before the individual summaries for the 5 sectors covered in the survey, it is worth pointing out that there were a handful of priorities this year that were common in their importance across all sectors. In 2022, workers, regardless of sector, are placing greater importance on the following areas that help make them feel good at work:

- Opportunities to continue **learning and developing** at work
- More options around **flexibility** covering all aspects of their job
- Greater **autonomy** and freedom to just get on with their work
- Improvements with all things **health and wellbeing** related



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 **Frontline
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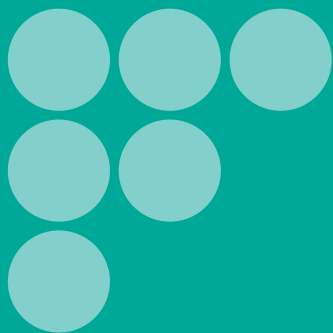
 **Frontline
Construction
Recruitment**

 **Frontline
Education
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 **Frontline
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Recruitment**

 **Frontline
Retail
Recruitment**

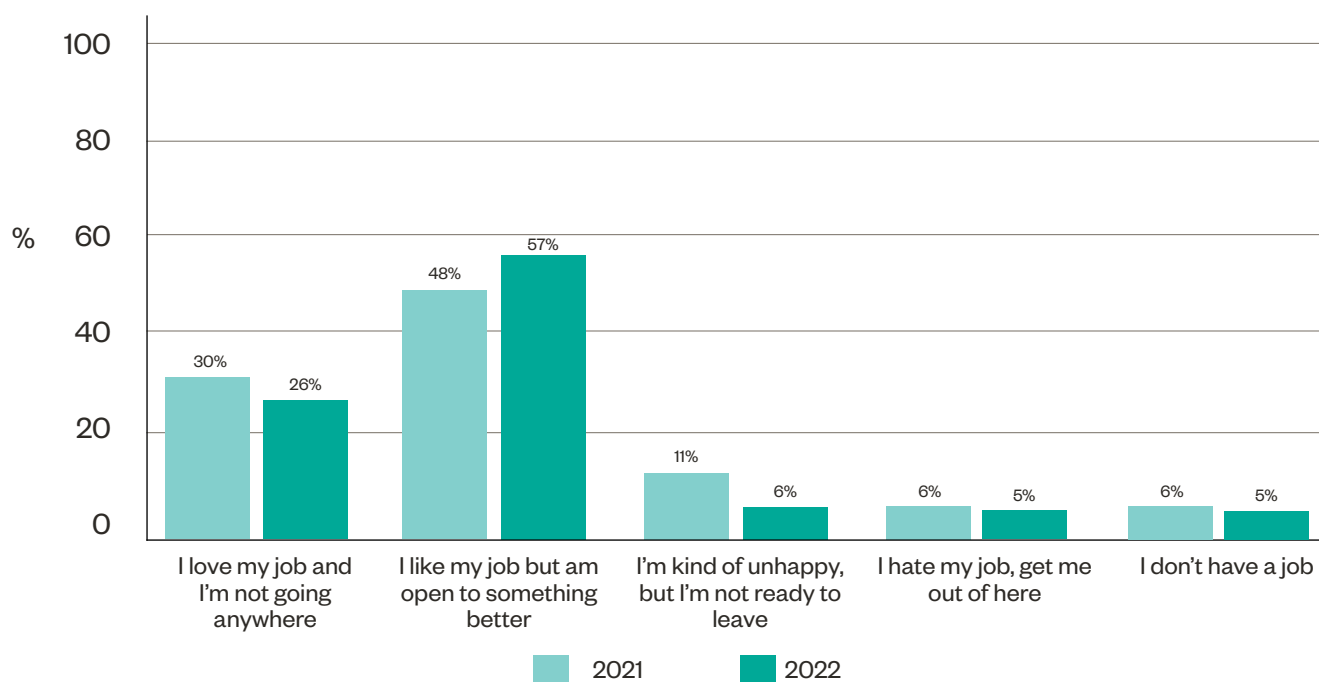
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Health Report

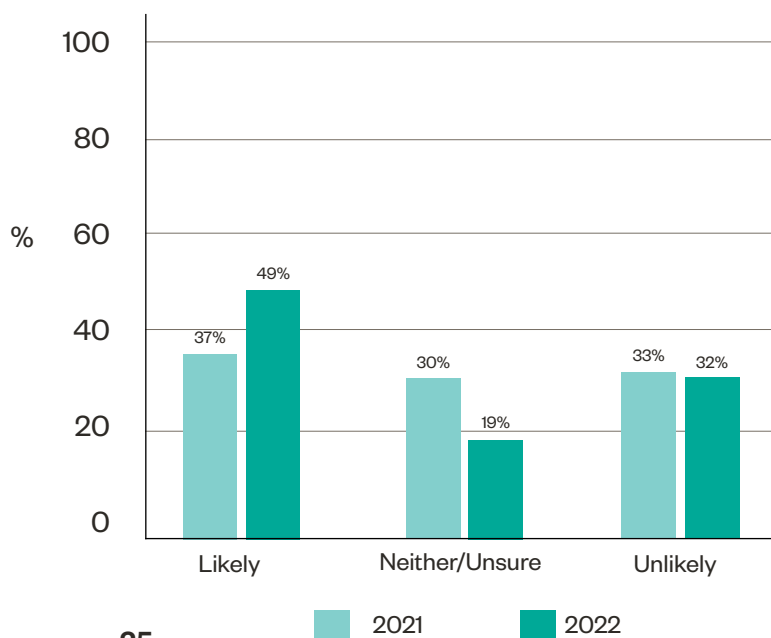
How healthcare employees feel about their job

Healthcare employees continue to have the most positive mindsets (83% which is 6pts higher than 2021). However, this year there has been a slight shift as fewer healthcare workers 'love' their job this year and a small proportion of them have slipped down into 'like my job but open', which is one of the biggest shifts across all sectors of +9% up to 57%.



How likely healthcare employees are to leave their job in the next 12 months

Just under half of healthcare workers say they are 'likely' to leave their job in the next 12 months (significant increase from last year, up 12pts). Perhaps a sign that these are some of the people who will be making up the masses of 'The Great Resignation', especially considering in the short-term, around one third say they are likely to leave their job in the next 3 months.



Priorities that healthcare workers need to feel good at work

Top priorities for healthcare workers this year are ‘leadership and management style’ as well as the ability to be able to ‘collaborate and have my voice heard.’ This is hardly surprising when you consider what the last 12 months must have been liked for these frontline workers. Interestingly, candidates in the health sector place quite a lot of importance on ‘The types of tasks I am asked to do in my job’, which again feels intuitive given the nature of what they are doing and the current climate they are being asked to work in. Healthcare workers (along with all other sectors) say perks are least important along with ‘communication about company’.

Top 3 priorities that increased the most YOY (Out of 5)



Overview



Healthcare workers this year rank **‘leadership/management style’** as their top priority ahead of all other sectors: **4.1 out of 5.**



The only sector that ranks **‘tasks asked to do in job’** within their top priorities which is not surprising at all: **3.9 out of 5.**

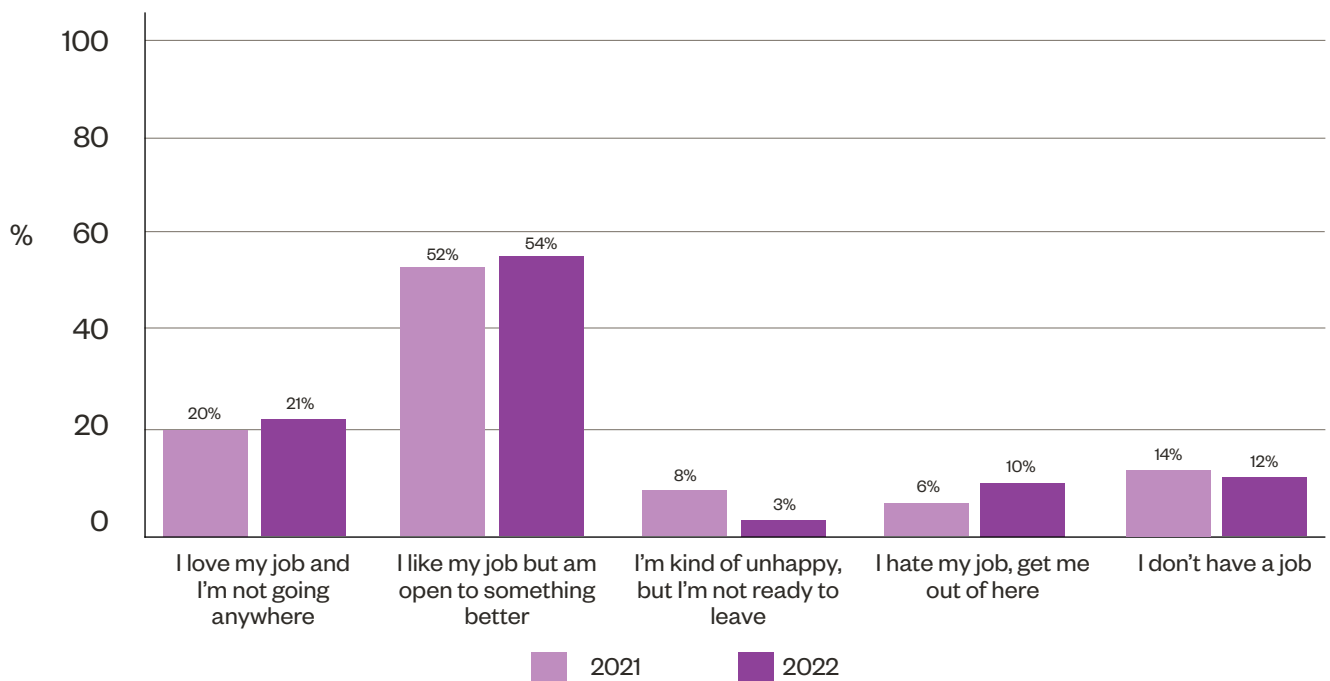


These workers prioritise **‘company strategy/direction’** the least compared with the other sectors: **3.4 out of 5.**

Retail Report

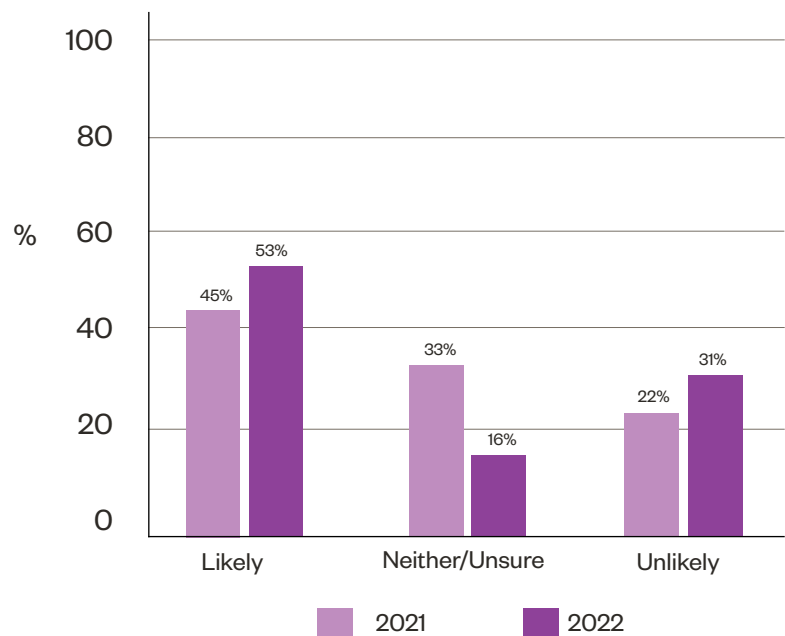
How retail employees feel about their job

Overall retail workers have the least positive mindset compared with all other sectors at 75%, but nevertheless that still means three quarters are positive about their job, and this is consistent with 2021. However, this year, retail workers have seen an increase of 4pts for 'I hate my job', which is now the highest of all sectors.



How likely retail employees are to leave their job in the next 12 months

No sign as yet of masses leaving in the short term with just over a third saying they are likely to leave. That said, when looking at the longer-term view, there is a slight skew above the average for those saying they are likely to leave in the next 12 months (53% vs 49%).



Priorities that retail workers need to feel good at work

Right at the top of retail employee’s priority list is ‘leadership and management style’ which is not that surprising when you contemplate the chaos they have been experiencing of late. Retail staff have felt the pain of the pandemic in the form of hostile customers, so it is hardly surprising that another of their top priorities is a greater focus on health and wellbeing (of all the sectors they rank this the highest overall). As seen for other sectors, retail workers place the least priority on ‘perks and other benefits’ but this does not mean they are not interested in money matters and financial rewards.

Top 3 priorities that increased the most YOY (Out of 5)



Overview



Workers in the retail sector rank **‘mental & physical wellbeing’** as one of their top priorities this year: **4.1 out of 5**.



They also place more importance than most other sectors on **‘leadership and management style’** this year: **4.2 out of 5**.

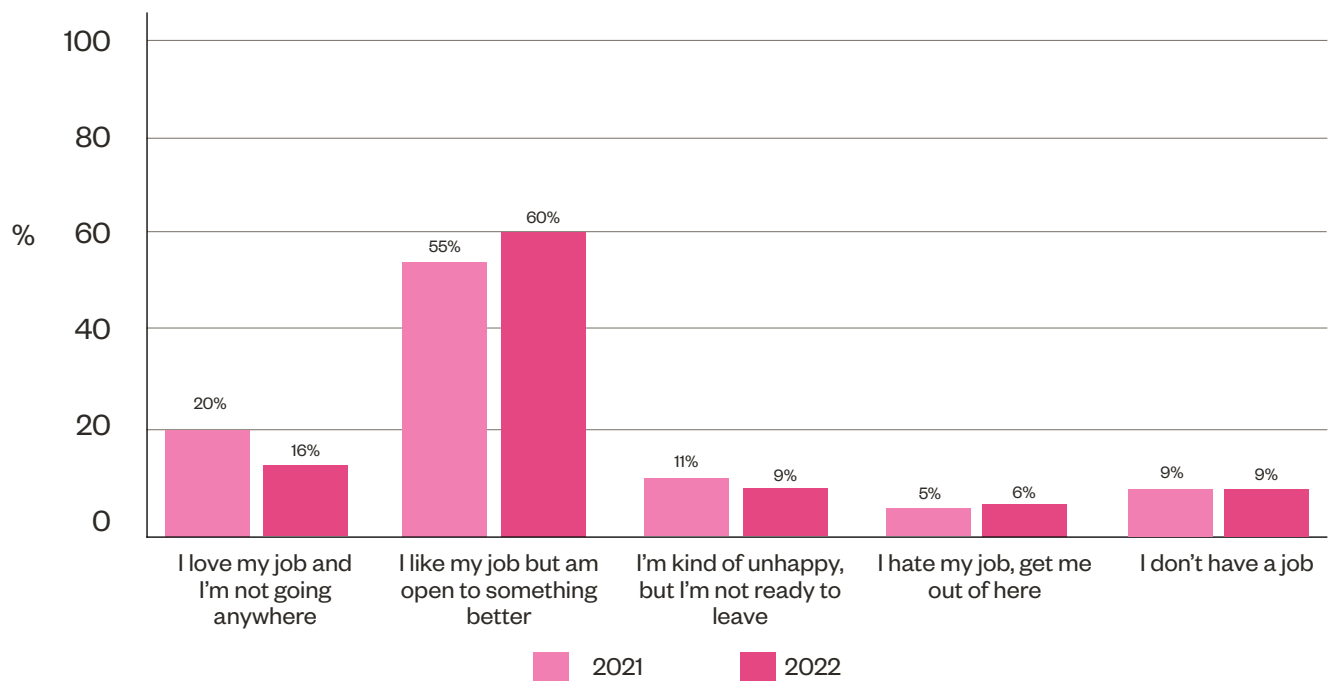


Similar to hospitality workers, retail employees rank **‘perks & benefits’** at the bottom but still on par with the average: **3.3 out of 5**.

Hospitality Report

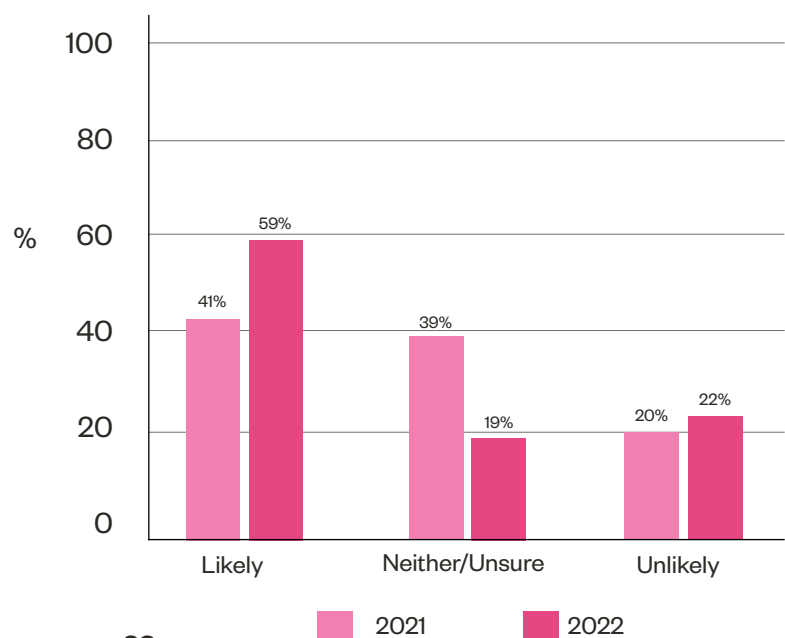
How hospitality employees feel about their job

The hospitality sector is not in good shape due to the fact that a lot of available workers are not here and for those that are, there are thousands of positions open but no workers to fill the roles. A combination of pay, legalities but also poor brand image is causing much of the damage. Workers need to feel like they are being paid fairly and that they are not being over-worked. Hospitality employees have the lowest levels of 'love my job' across sectors, but interestingly have the highest level of 'like my job' but this most likely is a function of workers now being more 'open' to other possibilities.



How likely hospitality employees are to leave their job in the next 12 months

It is hardly surprising that this sector has the highest proportion of workers (around half) who are likely to leave their job in the next 3 months. Over the longer term, around 6 in 10 hospitality employees say they will likely leave their job in the next 12 months. As with Retail, this could be the transient nature of the sector and could also be seen as a positive as it allows for greater agility.



Priorities that hospitality workers need to feel good at work

Unlike other sectors, hospitality workers place significant importance on how they get their job done, hence why they have one of the highest scores for ‘ability to act autonomously’ and ‘being able to collaborative and have voice heard’. Their priorities are indicative of younger generations who make up a significant proportion of hospitality employees which is why another highly ranked priority is ‘diverse and inclusive’ as well as ‘perks and benefits’.

Top 3 priorities that increased the most YOY (Out of 5)



Overview



‘Being able to collaborate’ is a key priority for hospitality workers, ranking higher than all sectors: **4.1 out of 5.**



These workers are typically Gen Z and Gen Y and so ‘diversity and inclusivity’ rank high compared with other sectors: **3.9 out of 5.**



Although the lowest score, ‘perks and benefits’ are still important to hospitality workers given the ongoing disputes around fair pay: **3.5 out of 5.**

Education Report

Priorities that education employees need to feel good at work

The education sector has had enormous pressure over the last 12-18 months and so it is no surprise that this year employees place high priority on themselves in three ways: naturally the desire to keep on learning; a plea for strong leadership that can inspire and guide and not forgetting some well-earned TLC in the form of improved wellness packages.

Top 3 priorities that increased the most YOY (Out of 5)



Overview



Learning is at the heart of most people who work in education so naturally they continue to rank **'learning and development'** at the top: **4.0 out of 5**.



Education workers saw one of the biggest shifts in their priorities this year, increasing importance for better **'mental & physical wellbeing'**: **3.9 out of 5**.



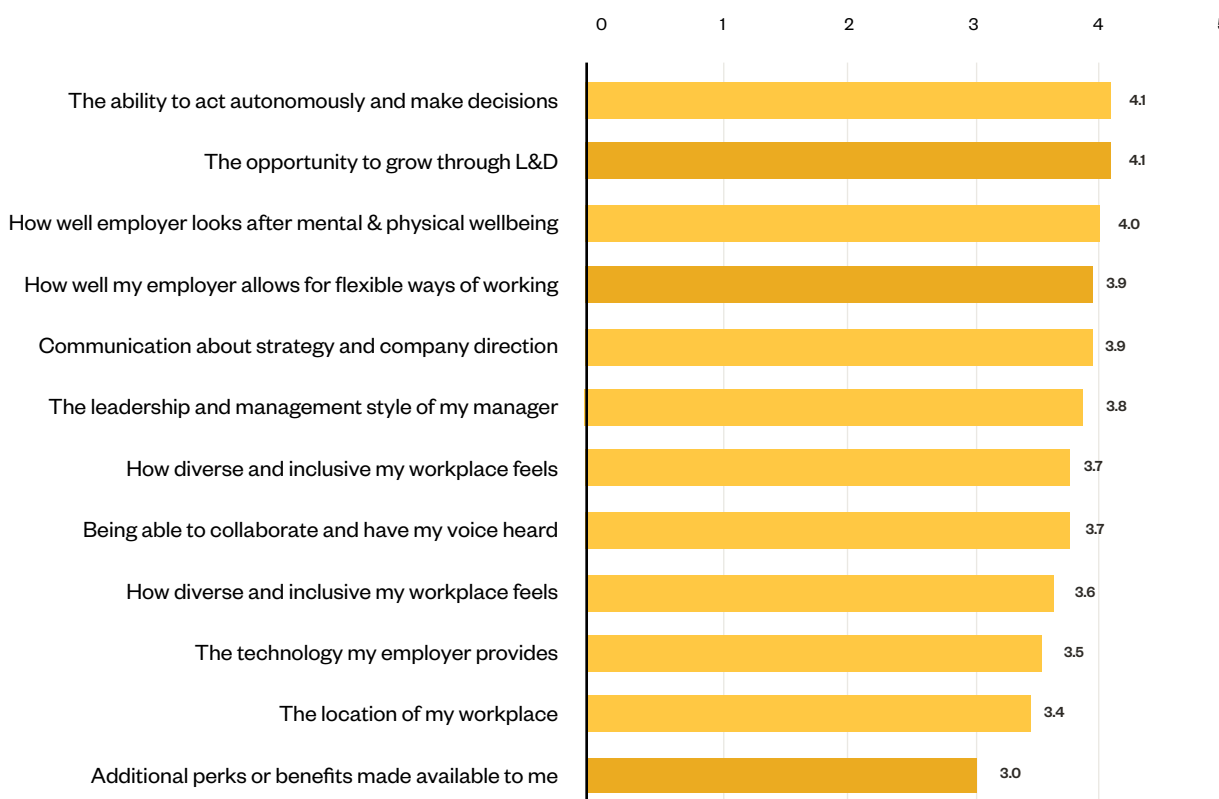
Although the lowest score, **'perks and benefits'** are still important to education workers given the ongoing disputes around fair pay: **3.5 out of 5**.

Construction Report

Priorities that construction employees need to feel good at work

Those that work in the construction industry have been relatively stable across the data this year and when it comes to what their priorities are it is very much about them working with their employer so they can get the best out of them. Key for these workers is to feel empowered and to not stop learning new skills of the trade. And when the pressure is on they want to know that the employer has their back and will take good care of them.

Top 3 priorities that increased the most YOY (Out of 5)



Overview



Key priority for those that work in construction this year is a **'greater sense of autonomy at work and trust to make their own decisions'**: **4.1 out of 5**.



This year sees a growing need for **more flexibility at work** as family lives become increasingly complicated: **3.9 out of 5**.



As to be expected, construction workers place less priority on **technology** although this does not mean it should be ignored: **3.5 out of 5**.



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