



Feel Good Index

Exploring what makes Australian and New Zealand workers thrive in their roles



**Frontline
Recruitment**

mccrindle



**Frontline
Feel Good
Index 2023**

Contents

About the report

- 20 From the CEO
- 22 About McCrindle

Research Findings

- 20 Executive summary
- 22 We spend a third of our time at work in a standard week
- 12 Three in five workers are open to new opportunities
- 14 What energises people at work?
- 17 Workers are most engaged when their job contributes to their wellbeing and sense of purpose
- 19 Workers are happy at work but are open to better opportunities
- 20 The relationship between thriving at work and thriving in life
- 21 Workers are thinking practically about what their role is worth
- 23 The engagement equation
- 26 Preventing a passive future workforce

Industry Findings

- 20 Engagement by Industry
- 22 [Construction industry snapshot](#)
- 24 [Education industry snapshot](#)
- 26 [Health industry snapshot](#)
- 29 [Hospitality industry snapshot](#)
- 31 [Retail industry snapshot](#)

Key takeaways

- 20 Key considerations for hiring managers:
- 22 Tips for job seekers:
- 24 Methodology
- 26 What's next?
- 29 Let us help you find your people
- 31 Are you your new boss?
- 33 References



About The Feel Good Index 2023 Report

We spend a third of our time at work in a standard week, that's 90,000 hours or 10 years across our lifetime. For most of us, we want to spend this time at work in a role that we enjoy, where we are making an impact and feeling fulfilled.

We know that our clients and candidates rely on us to truly understand human behaviour when it comes to life at work. Understanding beyond what people want to be paid, but how they want to live. These compelling insights into human behaviour allows us to guide our clients to deliver workplaces where people thrive and perform at their best.

This year, we've invested more than ever before in our Frontline Feel Good Index, partnering with McCrindle – Australia's leading social researcher in tracking and communicating social trends to deliver this unique in-depth report

Combining McCrindle's research and analytical excellence with our database of candidates means we can provide truly unique insights into workplace wellbeing in our industry specialist sectors of retail, hospitality, health, construction and education. This is in addition to the knowledge and expertise that our agency owners deliver with over 300 years of combined specialist industry experience working with clients and candidates.

How To Use The Feel Good Index

Proactively use these insights to understand what energises your workforce beyond salary and benefits to increase retention. This report will help you understand the key workforce trends across ANZ, such as what people value in their role e.g. tangible factors (salary) vs. intangible factors (growth and development). We also cover generational trends and what's possibly driving the different demographics in their career. You will also see the key themes of the role work plays in overall life satisfaction, how to increase productivity and positive word of mouth through engagement and understand what engages workers in your industry vs other sectors.

We all know that the past few years have been challenging for employers, especially with limited movements in the job market and rising inflation, resulting in a balancing act between employee retention and candidate attraction. Businesses that prioritise their people will continue to flourish in this environment and will continue to thrive in the future. Always. Our research findings will provide insights to help both jobseekers/employees and employers take positive steps forward.

Thanks to the 6000+ employees that completed our survey, we appreciate your contribution.

Arthur McColl

Arthur McColl

CEO, Frontline Recruitment Group & Express Employment Professionals ANZ

About McCrindle

McCrindle is Australia's Leading Social Research Organisation. They empower brands and organisations with social and industry insights to enable strategic decision making. Established in 2006 by Mark McCrindle a social analyst and demographer and futurist. with a passion for tracking social trends. Mark has written 5 books and coined the term for the latest generation, Generation Alpha.

McCrindle's data and insights has led to over 100 keynote presentations to audiences in 2022 alone.

McCrindle have worked with Frontline to deliver the Feel Good Index in 2023, gathered from Frontline's database of candidates and clients in conjunction with independent research panels in Australia and New Zealand.



Executive Summary



We spend a **third of our time** at work in a standard week



Three in five workers are open to new opportunities



29%

Job lovers

I love my job and I am not going anywhere



58%

Job opportunists

I like my job, but am open to something better



10%

Unhappy stayers

I am unhappy in my job, but am not ready to leave



4%

Eager leavers

I hate my job, and am ready to leave

What energises people at work?

How do the four types of workers thrive at work?



Job lovers

I love my job and I am not going anywhere



Job opportunists

I like my job, but am open to something better



Unhappy stayers

I am unhappy in my job, but am not ready to leave



Eager leavers

I hate my job, and am ready to leave



27%

Flexibility to fit role within other priorities in life



31%

Competitive salary and benefits



23%

Competitive salary and benefits



37%

Competitive salary and benefits



25%

Strong relationships with colleagues



29%

Flexibility to fit role within other priorities in life



23%

Flexibility to fit role within other priorities in life



29%

Supportive leadership and management



24%

When I feel proud about what I have accomplished in my role



25%

Opportunities for professional growth and development



21%

Supportive leadership and management

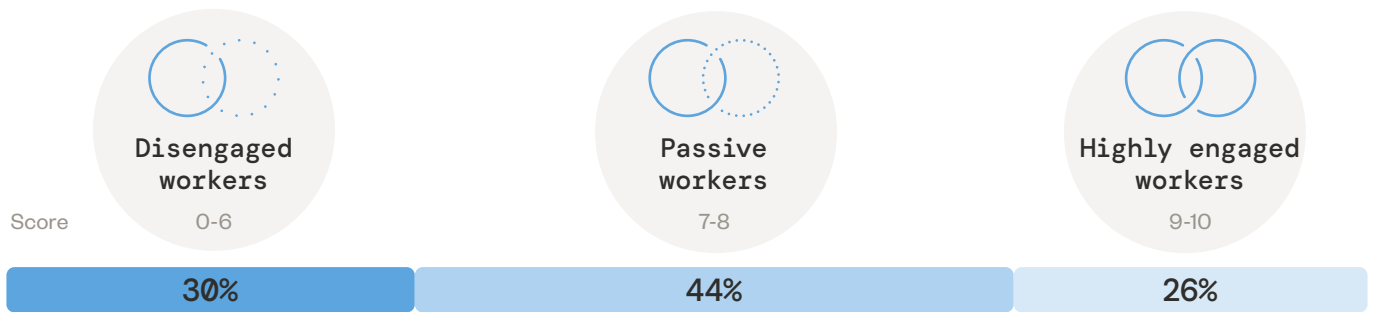


26%

Reasonable workload

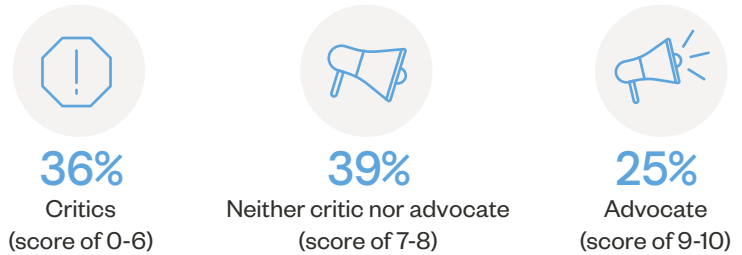
Only one in four workers are highly engaged

Thinking about how engaged you are in your current workplace and role, on a scale of 0-10 please rate your current engagement with your job.



One in three workers are critics of their current workplace

On a scale of 0-10, how likely is it that you would recommend your organisation as a place to work, where relevant, to a friend or contact?



56%

More than half of workers say their job plays an extremely/very important role in their overall life satisfaction



54% of workers believe their work is meaningful and produces positive impacts.



Workers are **4.5x more likely** to value what they can see over what they feel when accepting a job



82% of workers value factors they **can see**
e.g. remuneration, salary and professional development

vs.



18% of workers value what they **feel**
e.g. opportunities for personal growth, expanding networks

Key considerations for hiring managers



1. Articulate how workers make a positive and meaningful impact in your organisation to attract quality staff



2. Seek to understand that the skills and values of potential employees fit with your organisation's values



3. Ensure that you are clearly communicating the key tangible attributes of the job.
e.g. salary and professional development

Workers are happy at work but are open to better opportunities

As the workforce becomes increasingly mobile, simply being happy at work is not enough to keep workers in their roles. However, a high proportion of workers either love or like their job (86%).

While a high proportion of workers may love their job, almost three in five workers (58%), are open to considering a better offer if it came along, suggesting

that while workers are not actively seeking out other opportunities, they may be experiencing fatigue in their current role.

One in ten workers (10%) are unhappy in their role but are not ready to leave, while 4% of workers hate their job and are ready to leave.

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



Job lovers

I love my job and I am not going anywhere

29%



Job opportunists

I like my job, but I am open to something better

58%



Unhappy stayers

I am unhappy in my job, but am not ready to leave

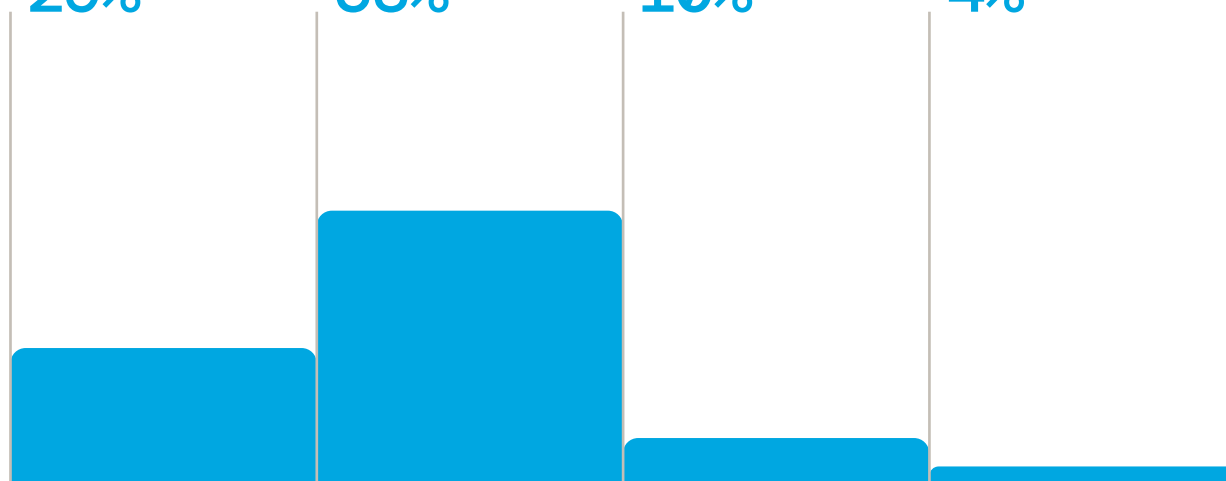
10%



Eager leavers

I hate my job, and am ready to leave

4%



Australian and New Zealand workers have similar attitudes towards work

Compared to New Zealanders, Australian workers are slightly more likely to love their job and have no intention of leaving, growing slightly from previous years.

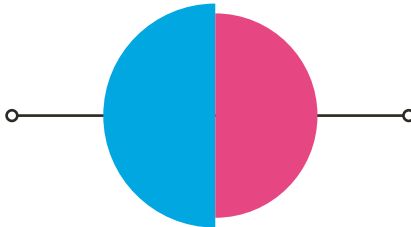


Job lovers

I love my job and I am not going anywhere

AU

30%



NZ

25%

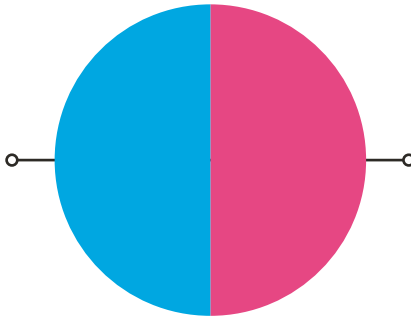


Job opportunists

I like my job, but I am open to something better

AU

58%



NZ

58%

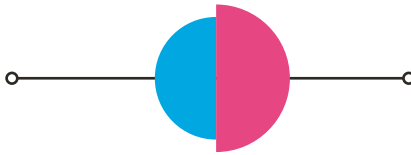


Unhappy stayers

I am unhappy in my job, but am not ready to leave

AU

9%



NZ

13%



Eager leavers

I hate my job, and am ready to leave

AU

4%



NZ

3%

Employees feel their best at work when their role fits within other priorities in their life

For many, feeling good at work requires a sense of satisfaction and accomplishment in their role. Various factors can contribute to this feeling, such as adequate compensation, connection to peers and opportunities for growth. These factors are key to cultivating an environment where workers can truly feel great at work.

Yet, workers today feel best at work when they have the flexibility to make their job work for them. Workers value a lifestyle where work is one part of their life, complementing and not hindering other priorities. In fact, workers feel best in their role when there is some flexibility provided, such as a hybrid working model or flexible working hours (28%).

Other key components to employees thriving at work include a competitive salary and benefits (27%), strong relationships with colleagues (24%) as well as opportunities for professional growth and development (24%).

While flexibility remains important, there are some differences across the four types of workers and what makes them feel their best at work. One in four workers who love their job feel their best at work when they have a sense of accomplishment in what they have achieved in their role (24%), while those who are open to better opportunities feel their best when there are opportunities for professional growth and development (25%).

What helps workers feel their best at work?



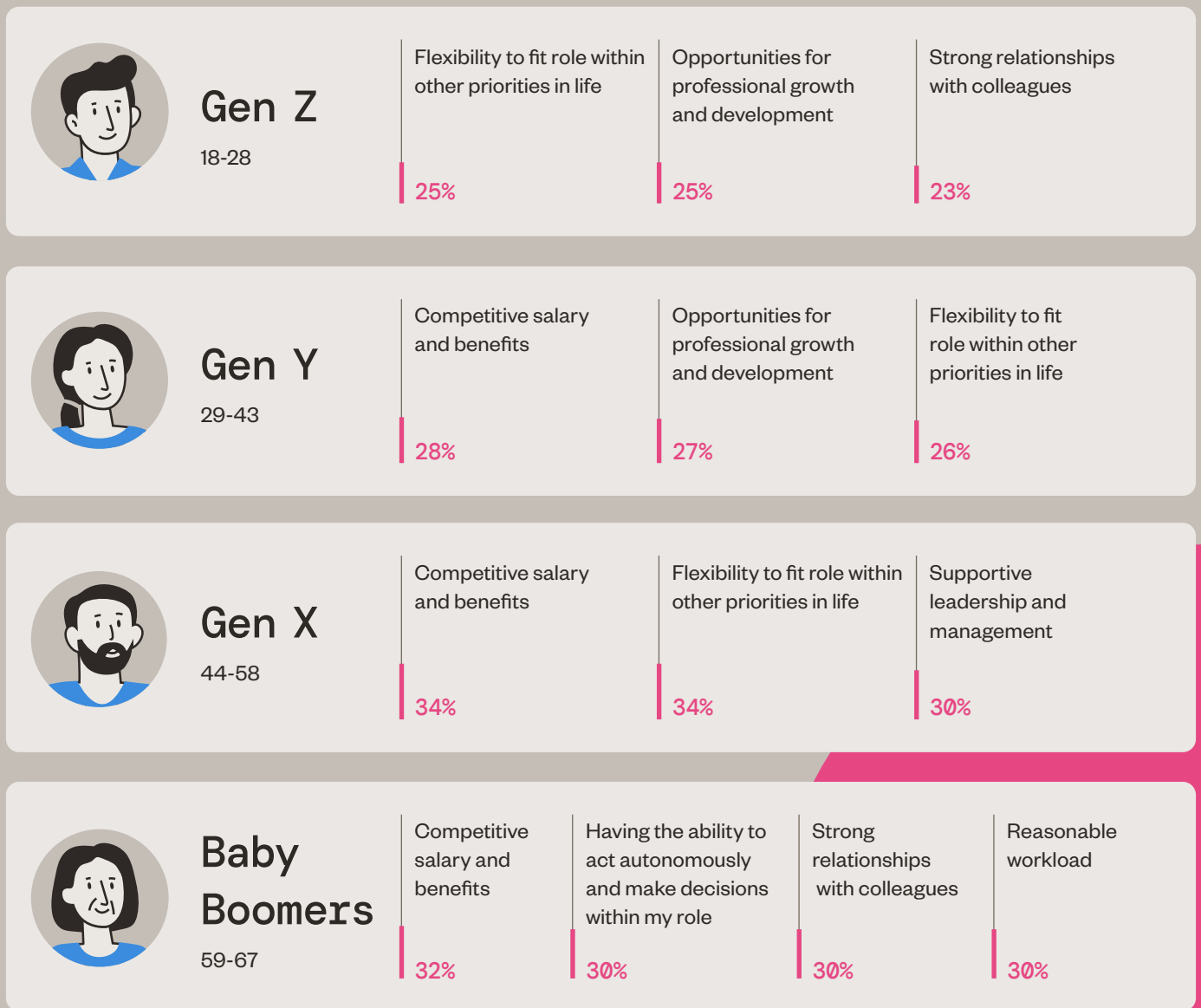
Younger generations are more likely to consider professional growth important to feeling their best at work

Flexibility as well as a competitive salary and benefits are key in helping workers feel their best at work. Younger generations, however, also

place high value on opportunities for professional growth and development. This is indicative of a hunger among the younger workforce to grow and

deepen their skills and knowledge, where simply 'getting the job done' is not enough.

Top three priorities for each generation to feel their best at work:



The relationship between thriving at work and thriving in life

Workers today recognise that their satisfaction at work has a direct impact on their overall life satisfaction. They understand that their experience at work can either boost or drain their happiness outside of work. This may be a key factor in workers seeking more flexibility in their role as they embrace the potential it has to improve, rather than hinder their overall satisfaction in life.

Workers who love their job and have no intention of leaving recognise that their job plays an extremely/very important role in their overall life satisfaction (75% cf. 52% like their job, 33% unhappy but not ready to leave, 39% hate their job and are ready to leave).



Workers who are highly engaged in their role are most likely to recognise how their work feeds into their overall life satisfaction. Seven in ten highly engaged workers (72%) believe their work plays an extremely/very important role in their overall life satisfaction, compared to 58% of passive workers and 40% of disengaged workers.



An opportunity to do meaningful work that produces positive impacts is a key draw card for workers

A key motivator for workers today is the ability to recognise that the work they are doing is both meaningful and produces positive impacts. Ensuring workers have an understanding of how their role to contribute to a flourishing society is key in keeping workers engaged with both their role and to attract quality staff in the future.

More than half of workers (54%) believe their role offers extremely/very meaningful work and produces positive impacts.

In fact, being able to see their work as meaningful and that it produces positive impacts is key in keeping workers engaged in their role. Four in five highly engaged workers (78%) see their work as meaningful and producing positive impacts, compared to 55% passive workers and 32% disengaged workers.

Workers who love their job and have no intention of leaving are most likely to believe their work is meaningful and produces positive impacts, highlighting how important it is to remind workers the bigger picture they are contributing to. This energises workers in their roles and can make positive impacts on their overall life satisfaction. Three in four workers who love their job (74%) believe their work is extremely/very meaningful, compared to half of workers who are open to something better (50%), one in three workers who are unhappy in their job but not ready to leave (33%) and one in five who hate their job and are ready to leave (20%).

54%

of workers believe their work plays an extremely/very important role in their overall life satisfaction.

Workers are not always deterred by a stressful workload

High levels of stress is often attributed to low levels of job satisfaction, engagement and motivation. While stress and broader workload expectations is something that employees and management must appropriately manage, the presence of stress does not necessarily deter employees or should be a red flag.

Three in five workers (62%) indicate feeling at least somewhat stressed by their current workload.

Workers who are extremely/very stressed by their workload, however, are more likely to recognise how their work is meaningful, compared to those who indicate no stress (67% cf. 58% not at all stressed). While stress levels should not be disregarded, perhaps this suggests that a worker's stress can be tolerated if their efforts produce good outcomes.

Similarly, workers who feel most stressed about their current workload are also more likely to believe their work plays a significant role in their overall life satisfaction. Two in three workers (65%) who are extremely/very stressed about their workload describe their work as playing an extremely/very important role in their overall life satisfaction, compared to 54% of those who are not at all stressed.

This may be an important reminder that while the presence of stress may not directly have a negative influence on job satisfaction, it is important that employees are supported well to use their stress as a motivator rather than a barrier in their role.

8%
Extremely stressed

19%
Very stressed

36%
Somewhat stressed

25%
Slightly stressed

13%
Not at all stressed



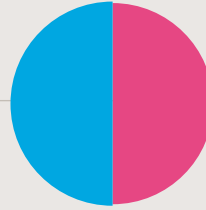
Workers are thinking
practically about what
their role is worth



Current inflation rate:

Australia²

7.4%



New Zealand³

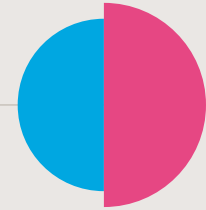
7.2%



Cost of living per month
(based on a single person)

Australia⁴

\$3,867



New Zealand⁴

\$4,543

Workers recognise their job enables them to live well

While work undoubtedly plays a role in overall life satisfaction, there are many other aspects of general wellbeing to consider. A person's emotional, social and financial health are all important factors in their overall quality of life and

while the workplace can be a means to outwork a person's sense of purpose in life, it is primarily a place that provides the resources needed to sustain one's life. Workers understand this and when they consider accepting a job, workers are

4.5x more likely to prioritise factors such as remuneration (82%), over aspects such as programs for personal growth (18%).

Workers are 4.5x more likely to value what they can see over what they feel when accepting a job

82% of workers value factors they can see

(e.g. remuneration, salary and professional development)

vs

18% of workers value what they feel

(e.g. opportunities for personal growth, opportunity to expand network)

Australians are slightly more likely than New Zealand workers to value factors such as remuneration over opportunities for personal growth.

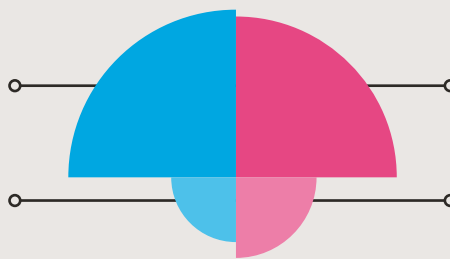
Australia

Tangible factors

87%

Intangible factors

13%



New Zealand

Tangible factors

80%

Intangible factors

20%

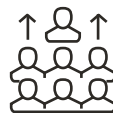
Engagement grows where there is a strong focus on professional development and training

While remuneration is certainly a key consideration for workers considering a move from their current role, the other tangible factor workers are seeking is quality professional development. Workers expect that organisations invest

in professional development and this is a pivotal consideration in moving roles. It is one way workers feel valued, that they are more than simply a worker but are a valued contributor to the bigger picture.



Workers who are highly engaged in their role are 2.9x more likely to strongly/somewhat agree their organisation adequately funds their professional development (77% cf. 27% low engagement).



Workers who are highly engaged in their role are 2.8x more likely to strongly/somewhat agree leaders in their organisation have a focus on coaching and development (76% cf. 27% low engagement).


The engagement equation

Engaged workers embody the culture of their organisation

A positive workplace culture is key to keeping workers engaged in their role and with the overarching mission and aims of the organisation. Culture ultimately determines how things are done – be it with a sense of joy and passion, or with resentment and drudgery. It is a positive workplace culture that workers are looking for – a place where they are not just using their skills to get a job done, but a place that fosters growth and a sense of purpose.

It is crucial therefore for organisations to be mindful how their culture impacts their ability to attract and retain quality staff. While a similar proportion of workers believe their organisation is extremely/very effective in both areas (46% attracting, 44% retaining), there is room for improvement. Organisations need to be intentional in both keeping current employees satisfied in their role and with the organisation, while proactively finding talent with both the skills and culture alignment to make positive contributions to the future of the organisation.





Workers who are most engaged believe their organisation excels in driving engagement, reflecting perhaps a correlation between high levels of engagement and a positive experience in the workplace. That being said, workers are most engaged when they feel valued and secure in their role (retaining) and when they can see their organisation proactively thinking about attracting new talent (attracting). In fact, highly engaged workers are 2.5x more likely to think their organisation is extremely/very effective in retaining quality staff compared to disengaged workers (64% highly engaged workers, 46% passive workers, 25% disengaged workers). Similarly, highly engaged workers are 2.2x more likely to believe their organisation effectively attracts quality staff (63% highly engaged workers, 47% passive workers, 29% disengaged workers).

Yet, this does not come without its challenges...

Unsurprisingly in a highly mobile workforce, the last 12 months have posed a serious challenge for organisations in recruiting and attracting quality staff.

The hardest challenge for organisations has been recruiting the right people, reflective of both a skills shortage as well as organisations increasingly seeking workers who are a good culture fit. Almost nine in ten organisations (87%) have found

it difficult to recruit the right people for their roles in the last 12 months.

Not too dissimilarly, four in five organisations (80%) have found it difficult to retain quality staff. This again reinforces the mobility of the workforce today and suggests that workers are unafraid to move if their role does not positively impact their lives.

Preventing a passive future workforce

Many factors influence the creation of a high quality workforce, including current employee engagement, the likelihood of workers to choose their current workplace again, as well as advocating

for their current organisation as a great place to work. Buy in from employees is essential to an organisation's ability to produce positive impacts now and into the future. It is essential that people

can find work that keeps them engaged within organisations that champion what helps them to feel their best at work.

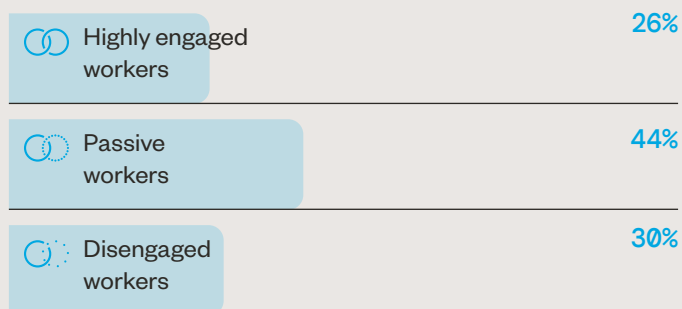
Some workers already have one foot out the door

One in four workers (26%) describe being highly engaged in their role, while one in three (30%) report being disengaged. This leaves 44% of the workforce only passively engaged with their work, posing both a threat and an opportunity for the workforce today and into the future. It is a threat in the way that it inhibits workers and organisations from reaching their full potential but is an opportunity for organisations to consider how to energise and engage workers in their current role.

Unsurprisingly, those who love their job and have no intention of leaving are twice as likely as those who like their job but are open to something better to be highly engaged in their job (44% love my job, 21% like my job but open to something better, 16% unhappy in job but not ready to leave, 7% hate my job and ready to leave).

Interestingly, four in five workers (79%) who are open to something better are either passively or completely

disengaged with their work. This reflects the mindset of a 'quiet quitter', having already mentally checked out of their current role, ready for something new. While this passive posture of many workers poses a threat to organisations, it is a great opportunity for recruiters to find work for candidates that excites them and will engage them now and into the future.



Four in five workers (79%) who are open to something better are either passively engaged or completely disengaged with their work.

Three tips to engage workers

Understanding how workers feel their best at work is essential to maximising worker engagement, both for organisations as well as recruiters.



Highly engaged workers



29%

Having flexibility in my role to fit within other priorities in my life (e.g. hybrid work, flexible work hours)



25%

Having opportunities for professional growth and development



25%

When I feel proud about what I have accomplished in my role



Passively engaged workers



29%

Competitive salary and benefits



28%

Having flexibility in my role to fit within other priorities in my life (e.g. hybrid work, flexible work hours)



25%

Having opportunities for professional growth and development



Disengaged workers



29%

Competitive salary and benefits



26%

Having flexibility in my role to fit within other priorities in my life (e.g. hybrid work, flexible work hours)



25%

Reasonable workload

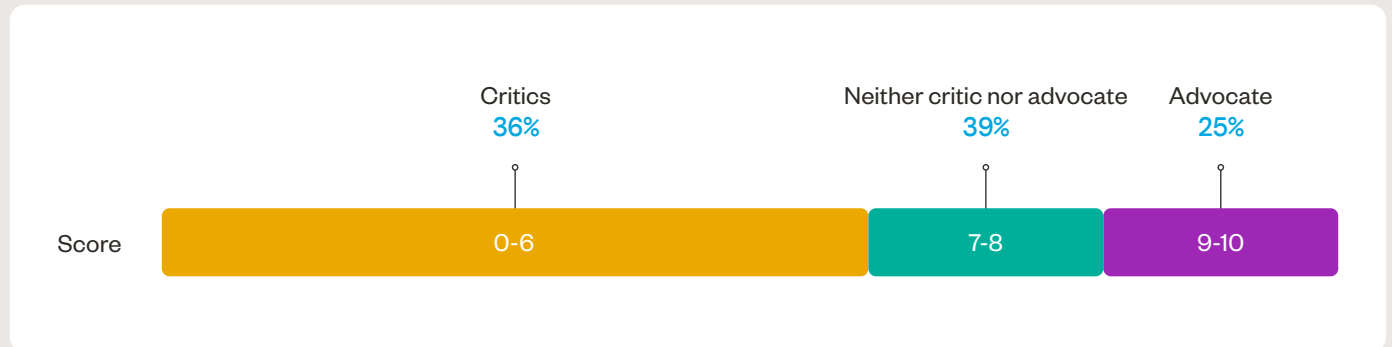


Workers are unlikely to advocate for their current workplace

Whether consciously or not, current employees play a role in attracting new staff, either by being an advocate or critic of the organisation they work for.

More than one in three workers (36%) would actively critique their current organisation as a place to work, while 39% would neither advocate for, nor critique

their organisation. Just one in four workers (25%), however, would actively promote their current organisation as a place to work.

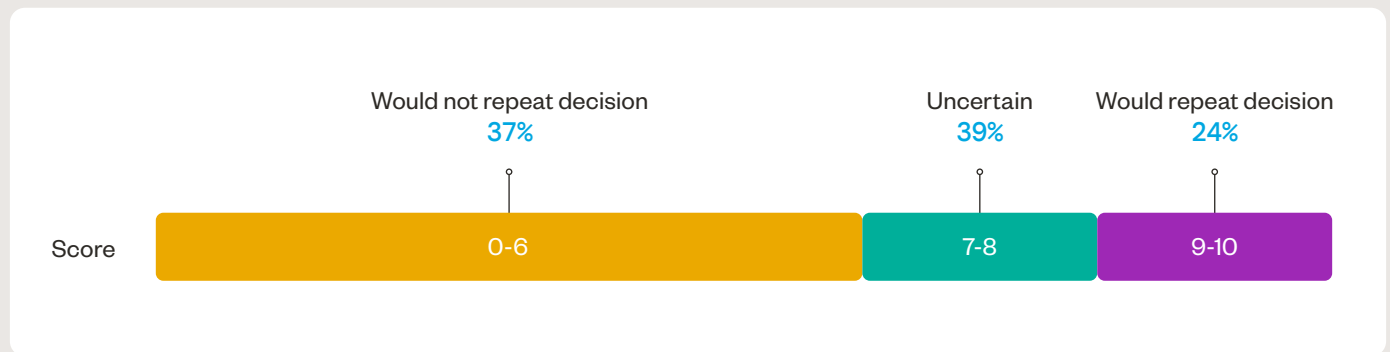


Workers who are most engaged are likely to be the greatest advocates of their organisation, highlighting the importance of a values alignment between the employee, the organisation and a great workplace culture. In fact, highly engaged workers are 20x more likely to actively promote their organisation than disengaged workers (61% highly engaged, 17% passively engaged, 3% disengaged workers).

Workers are unlikely to repeat their decision to join their current organisation

It is unlikely that workers would choose their organisation as a place to work again. In fact, just one in five workers (24%) would repeat their decision, while 39% are unsure if they would repeat their

decision and 37% would definitely not choose to work with their current organisation if they could make their decision again.

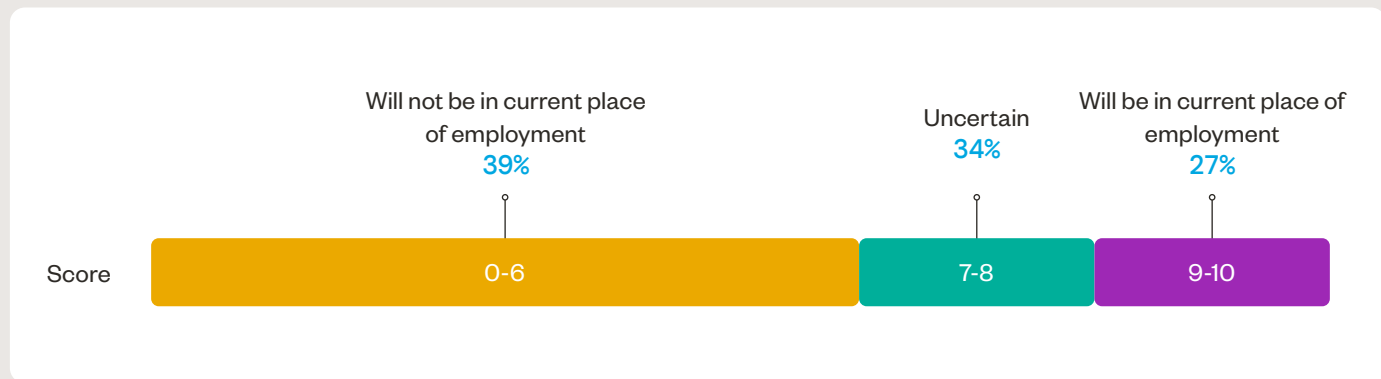


There is a relationship between workers who love their job and workers who are likely to repeat their decision to work in their current workplace. This reemphasises that workers are no longer satisfied with the job alone, but seek other factors such as good workplace culture and the opportunity to do meaningful work. In fact, workers who love their job are 2.5x more likely to have made the same choice to work in their current organisation than those who are open to something better (43% love my job compared to 17% of people who like their job but are open to something better).

Workers do not see themselves in their role for the long-term

Reflective of today's highly mobile workforce, it isn't surprising that workers do not think they will remain with their current employer in the near future. In fact, workers are most likely to believe they will not be in their

current place of employment in two years' time (39%), while a similar proportion are uncertain (34%). Just one in four workers (27%) are confident they will be in their current place of employment in two years' time.



Engagement by Industry

The Net Engagement Score (NES)

The Net Engagement Score is calculated from the question: 'Thinking about how engaged you are in your current workplace and role, on a scale of 0-10 please rate your current engagement with your job.'

based on the assumption that every worker can be divided into three categories: highly engaged, passive and disengaged.



Highly engaged
(score 9-10)

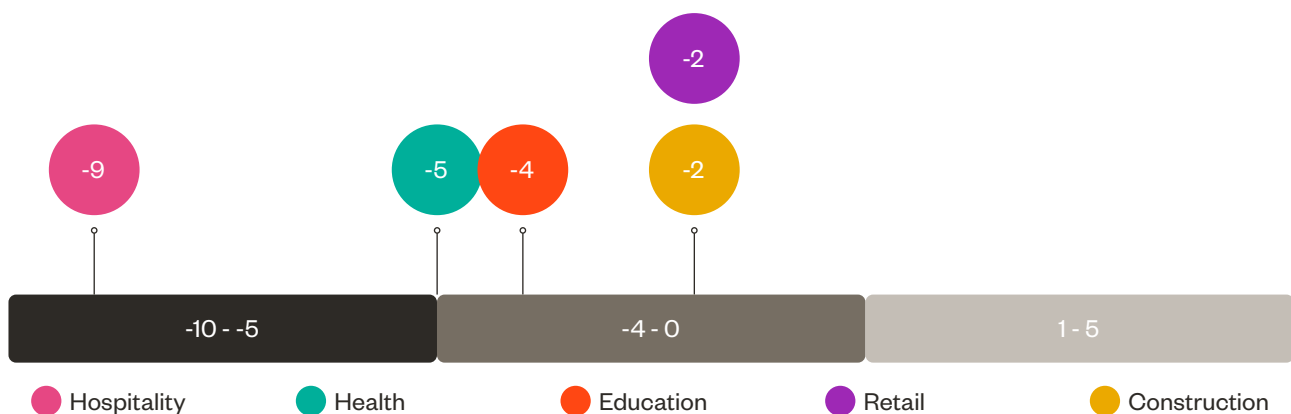


Passive
(score 7-8)



Disengaged
(score 0-6)

The NES is calculated by subtracting the % of highly engaged workers from disengaged workers. An NES score can range anywhere between -100 and 100. A score above 0 is considered a good score.



These results are a great benchmark and show there is room to improve worker engagement across all industries.



Construction industry snapshot

How are construction workers feeling about their job?

Overall, workers in the construction industry feel positively towards their job, with 86% either loving or liking their job. While 58% of workers in this industry like their job, however, many are open to something better.



Job lovers

I love my job and I am not going anywhere

27%



Job opportunists

I like my job, but am open to something better

58%



Unhappy stayers

I am unhappy in my job, but am not ready to leave

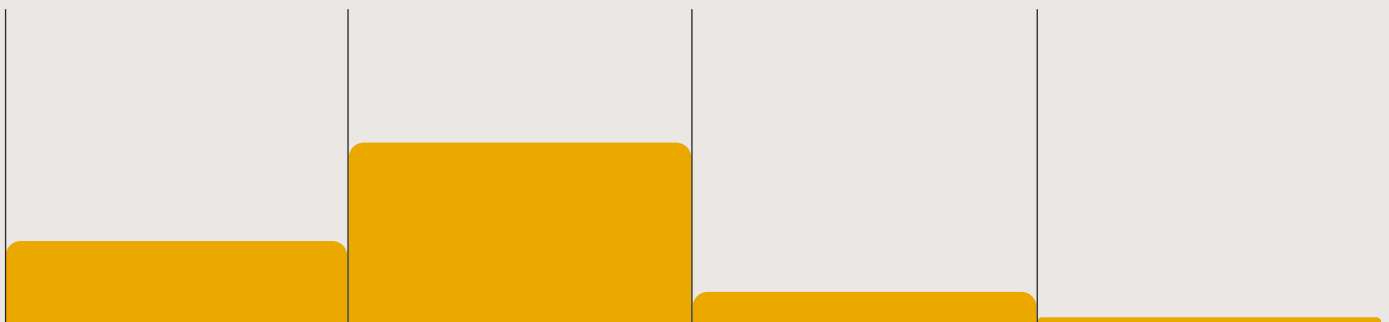
11%



Eager leavers

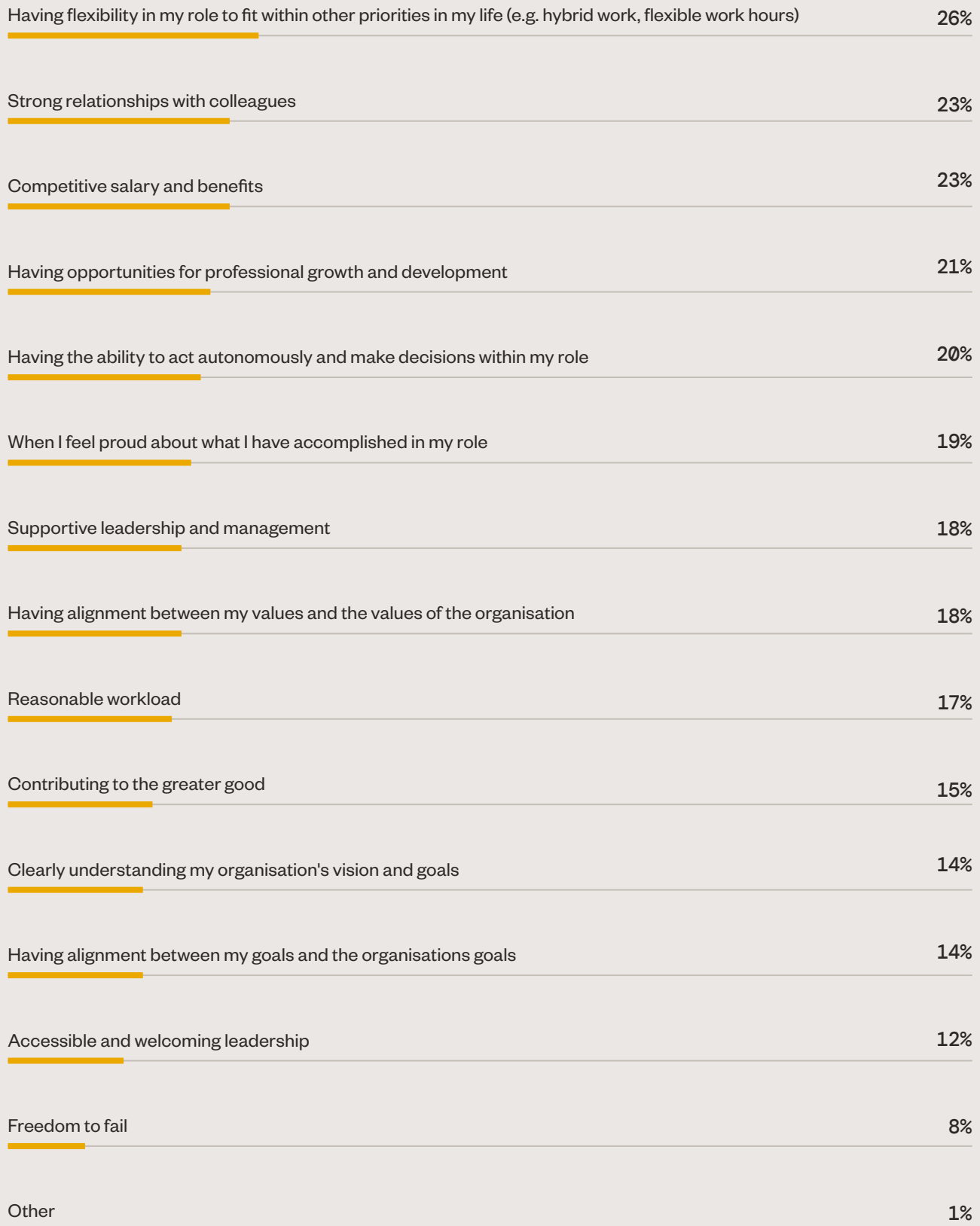
I hate my job, and am ready to leave

3%



Construction workers feel best at work when there is a level of flexibility in their role

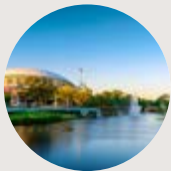
Construction workers n=562



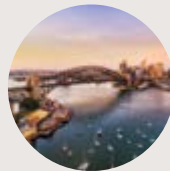
Get in touch our
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Recruitment team for
further insights



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Education industry snapshot

How are workers in the education industry feeling about their job?

Almost nine in ten education workers feel positively towards their job (87%). However, 56% of workers in this industry are open to something better, perhaps reflective of the fatigue many in the education sector are feeling.



Job lovers

I love my job and I am not going anywhere

31%



Job opportunists

I like my job, but am open to something better

56%



Unhappy stayers

I am unhappy in my job, but am not ready to leave

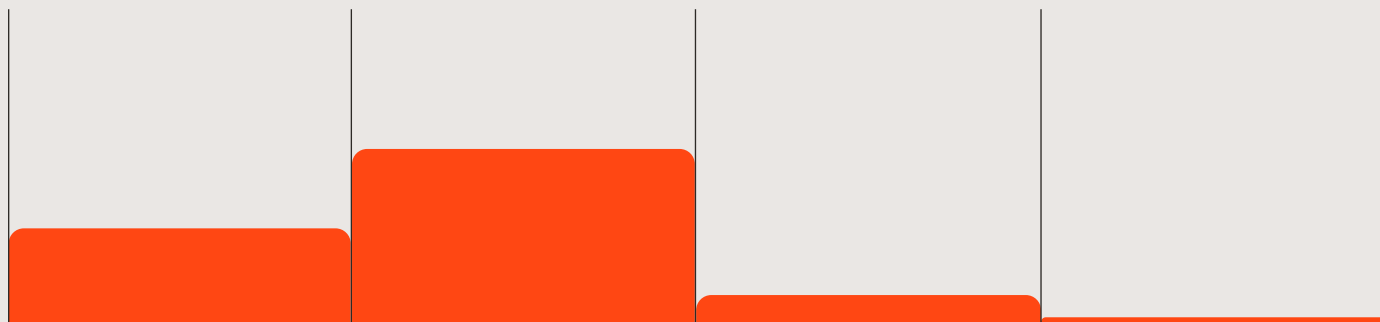
10%



Eager leavers

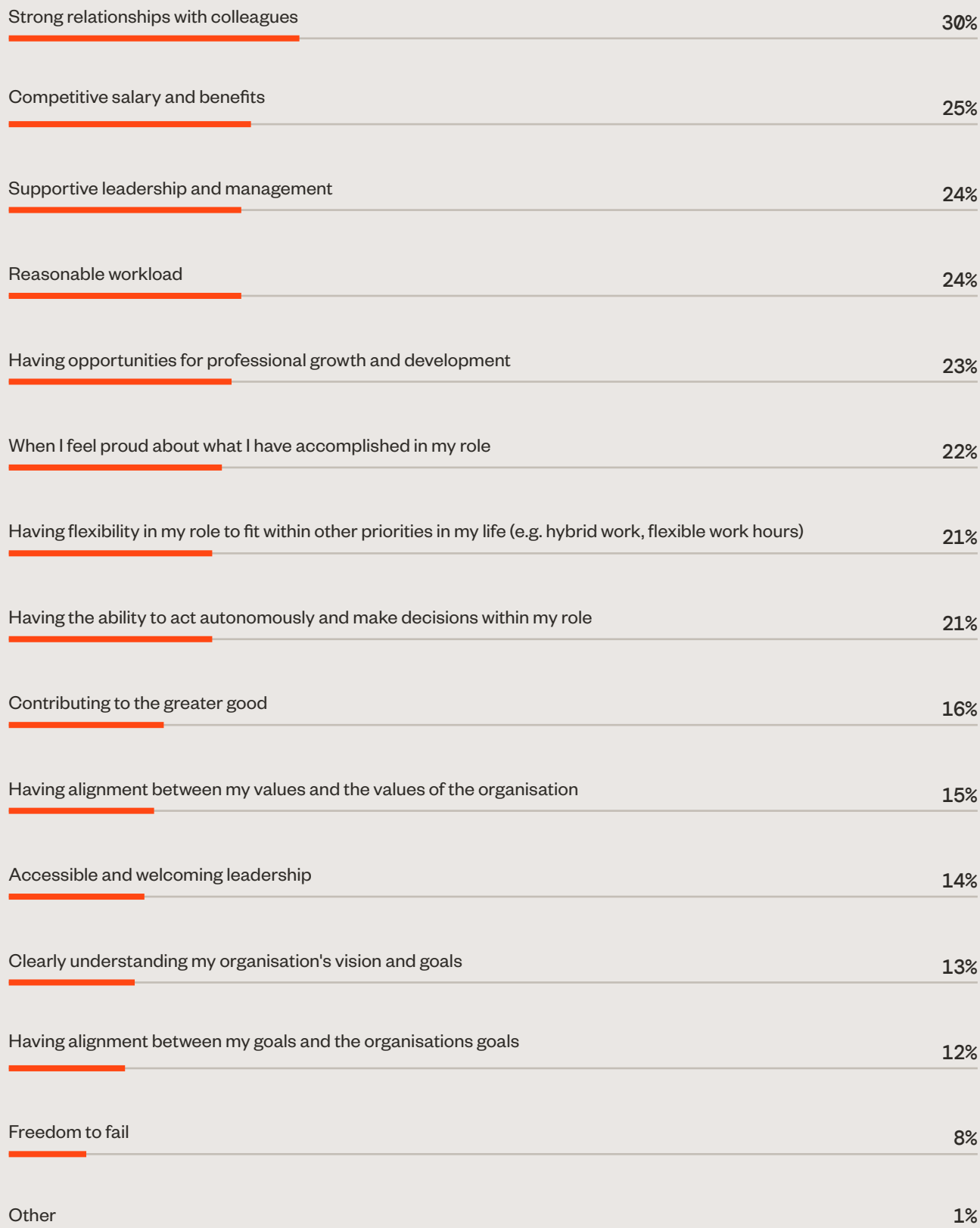
I hate my job, and am ready to leave

3%



Education workers thrive when they have strong relationships with colleagues

Education workers n=596



Get in touch our
**Frontline Education
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Health industry snapshot



How are health workers feeling about their job?

Almost nine in ten health workers (88%) feel positively towards their job. A high proportion, however, are open to something better (62%). This demonstrates a willingness of people in the health industry to either transition into different roles within the health sector, or to transition to a new industry entirely.



Job lovers

I love my job and I am not going anywhere

27%



Job opportunists

I like my job, but am open to something better

62%



Unhappy stayers

I am unhappy in my job, but am not ready to leave

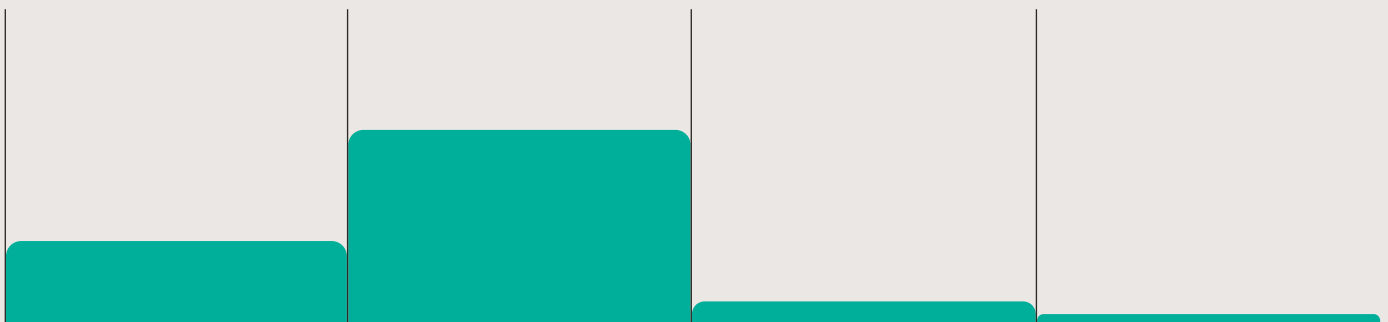
8%



Eager leavers

I hate my job, and am ready to leave

4%



Health workers feel their best at work when they receive a competitive salary and benefits

Health workers n=657



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Hospitality industry snapshot



How are hospitality workers feeling about their job?

Almost nine in ten hospitality workers feel positively towards their job (87%). Two in three workers, however, are open to something better (66%).



Job lovers

I love my job and I am not going anywhere

21%



Job opportunists

I like my job, but am open to something better

66%



Unhappy stayers

I am unhappy in my job, but am not ready to leave

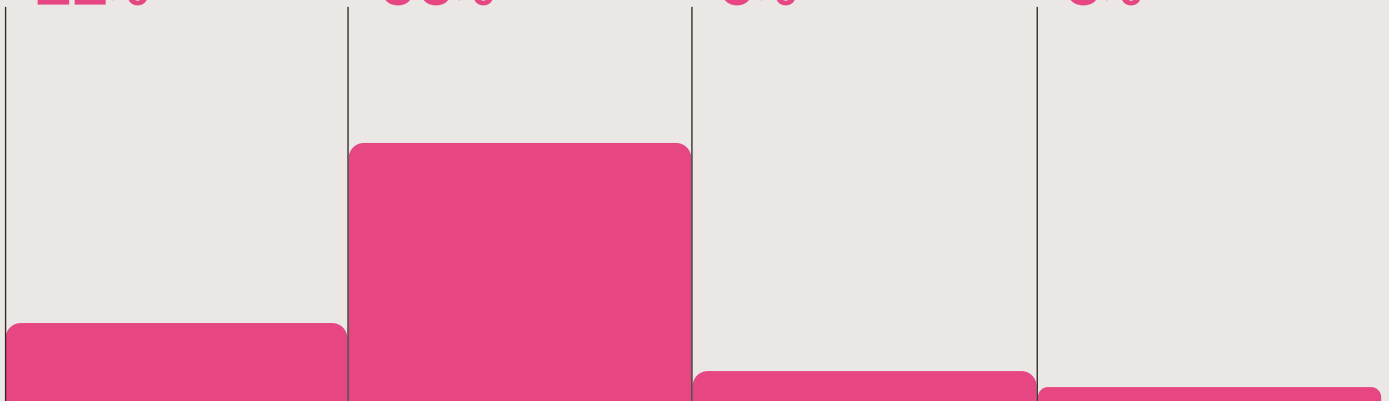
9%



Eager leavers

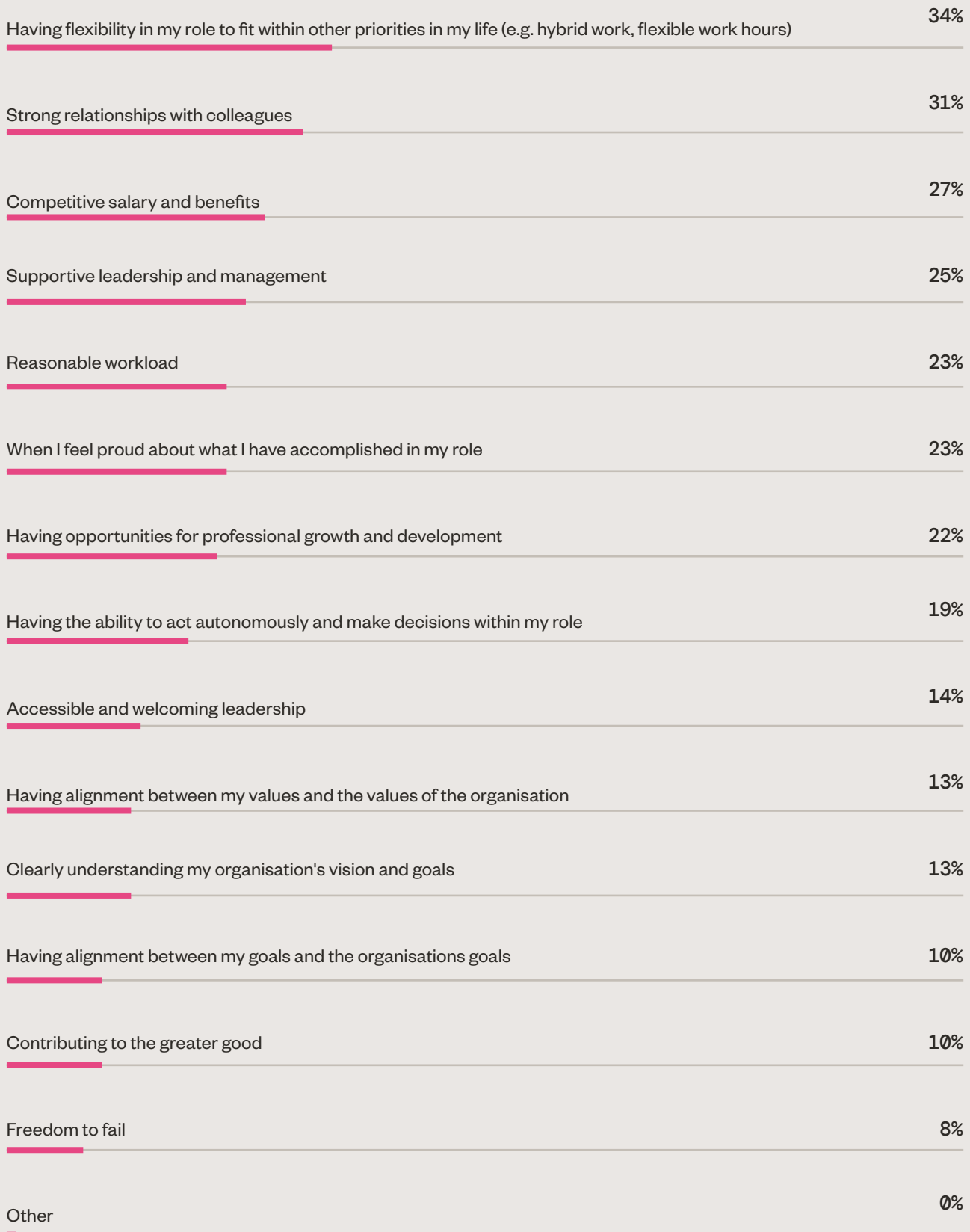
I hate my job, and am ready to leave

5%



Hospitality workers feel their best at work when they have flexibility in their role

Hospitality workers n=519

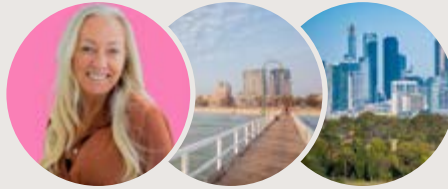


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Retail industry snapshot



How are retail workers feeling about their job?

Almost nine in ten retail workers feel positively towards their job (87%). Despite this, a high proportion of those who feel positively towards their job are open to something better (57%).



Job lovers

I love my job and I am not going anywhere

30%



Job opportunists

I like my job, but am open to something better

57%



Unhappy stayers

I am unhappy in my job, but am not ready to leave

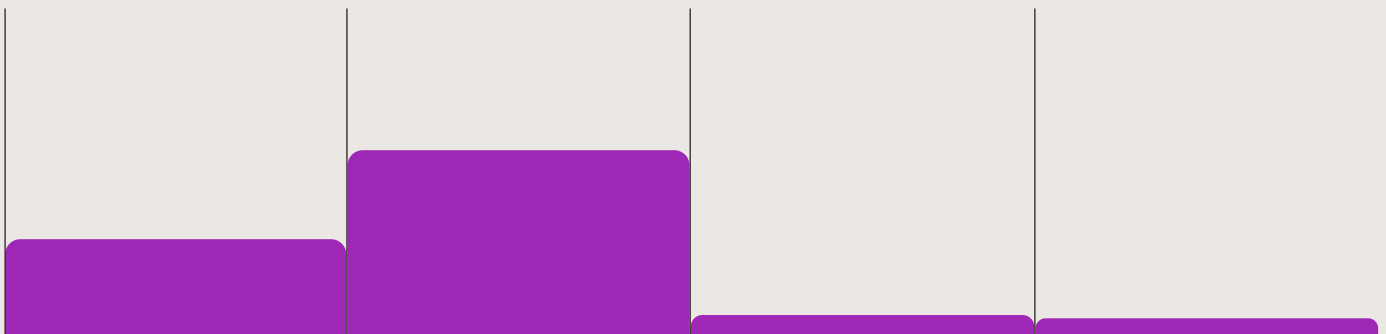
7%



Eager leavers

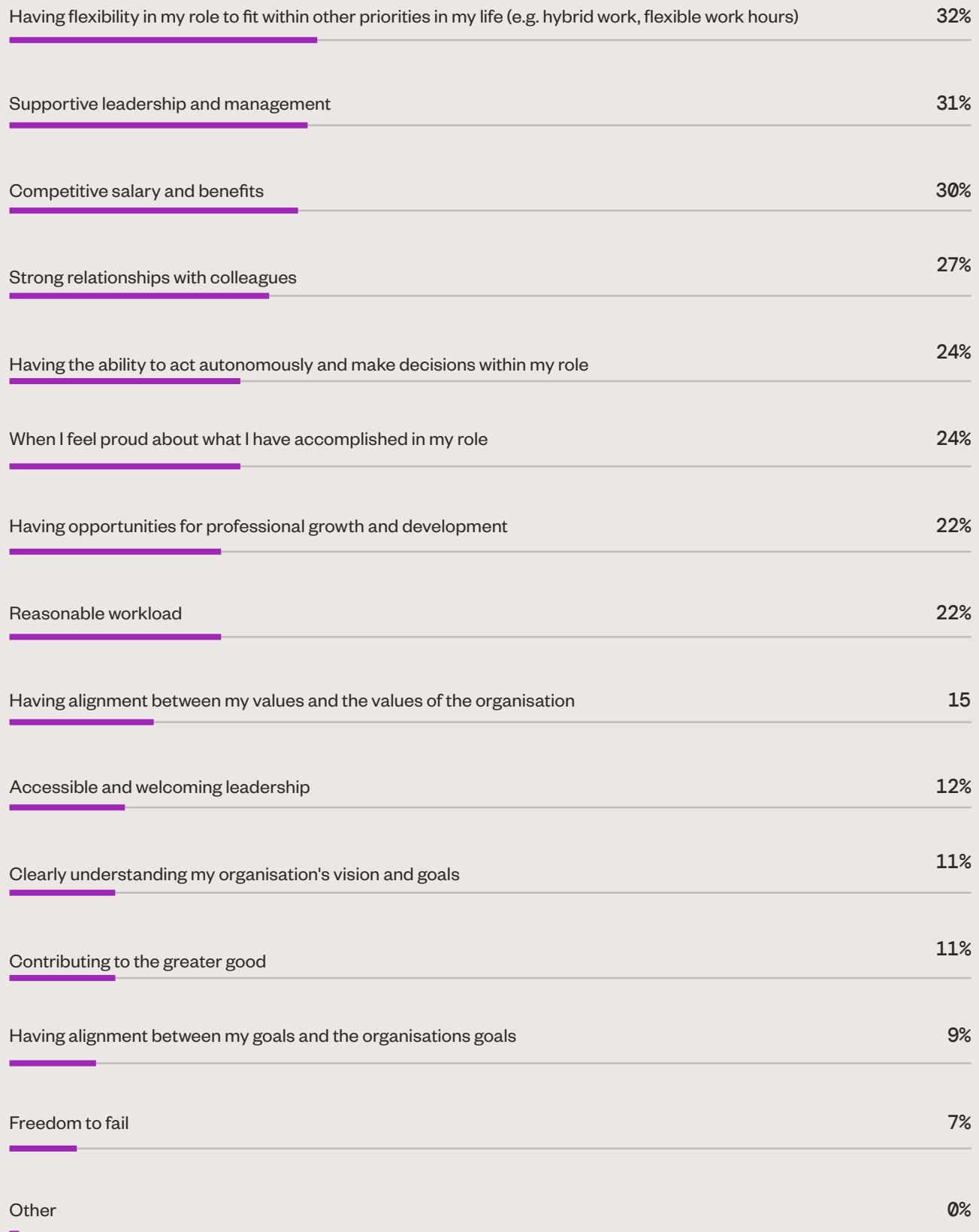
I hate my job, and am ready to leave

6%



Retail workers feel their best at work when they have flexibility in their role

Retail workers n=670



Get in touch our
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Key considerations for hiring managers:



Articulate how workers make a positive and meaningful impact in your organisation to attract quality staff



Seek to understand in the skills and values of potential employees fit with your organisations values



Ensure that you are clearly communicating the key tangible attributes of the job . E.g. Salary and professional development

Tips for job seekers:



Be clear about what it is you are looking for in a job including alignment of values, salary and professional development.



Take ownership of your career by proactively seeking opportunities that help you grow professionally and personally.



Proactively ask hiring managers about factors that are important to you including workplace flexibility, training and support and workplace culture.

Methodology

This report is the collation of findings from an online survey of workers across Australia and New Zealand.

The perspectives of workers were collected via an online survey distributed to a panel of Australian and New Zealand workers as well as distributed through Frontline Recruitment Group internal lists.

Australian Frontline Recruitment Group network: Online survey in field from 13th of March to 2nd of April 2023, yielding n=2,629 responses

New Zealand Frontline Recruitment Group network: Online survey in field from 13th of March to 2nd of April 2023, yielding n=1,010 responses

- Australian workers: Online survey in field from 13th – 20th of March 2023, yielding n=2000 responses
- New Zealand workers: Online survey in field 13th – 17th of March 2023, yielding n=506 responses.

Graphs and rounding

Data labels on the graphs in this report have been rounded for simplicity. Some graphs, may, therefore sum to 99% or 101%. Any calculations where two data points have been added are based on raw data (not the rounded data labels on the graph) which have been rounded once combined.



What's next?



Frontline Recruitment Group agencies are individually owned and operated across Australia and New Zealand by experienced recruitment and industry professionals in:



With years of industry experience, Frontline Recruitment Group are on the frontline to help place the right people in the right roles.

[FIND OUT MORE](#)



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2. Reserve Bank of Australia, 2023
3. StatNZ, 2023
4. Expatistan, 2023
5. McCrindle, *Shaping culture in a decentralised environment, 2022*



Are you your new boss?

At Frontline Recruitment Group, not only do we help people find the right jobs, but we also help them realise their dream of owning their own business through our franchise opportunities.

You don't need to have experience in recruitment to start a Frontline Recruitment Agency. What's more important is industry experience and strong connections in one of our areas of specialisation.

The Frontline Recruitment Group franchise opportunity is ideally suited to someone who is:

- Sales and client service focused
- Team oriented
- A natural leader
- High energy/extroverted
- Hands-on
- Driven

For more information on the Frontline Recruitment Group franchise opportunity, visit:

www.frontlinefranchising.com



Find your people



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