

COVID-19

Candidate Sentiment Monitor

JULY 2020 UPDATE

Prepared by SEEK's Customer Insights & Strategy Team



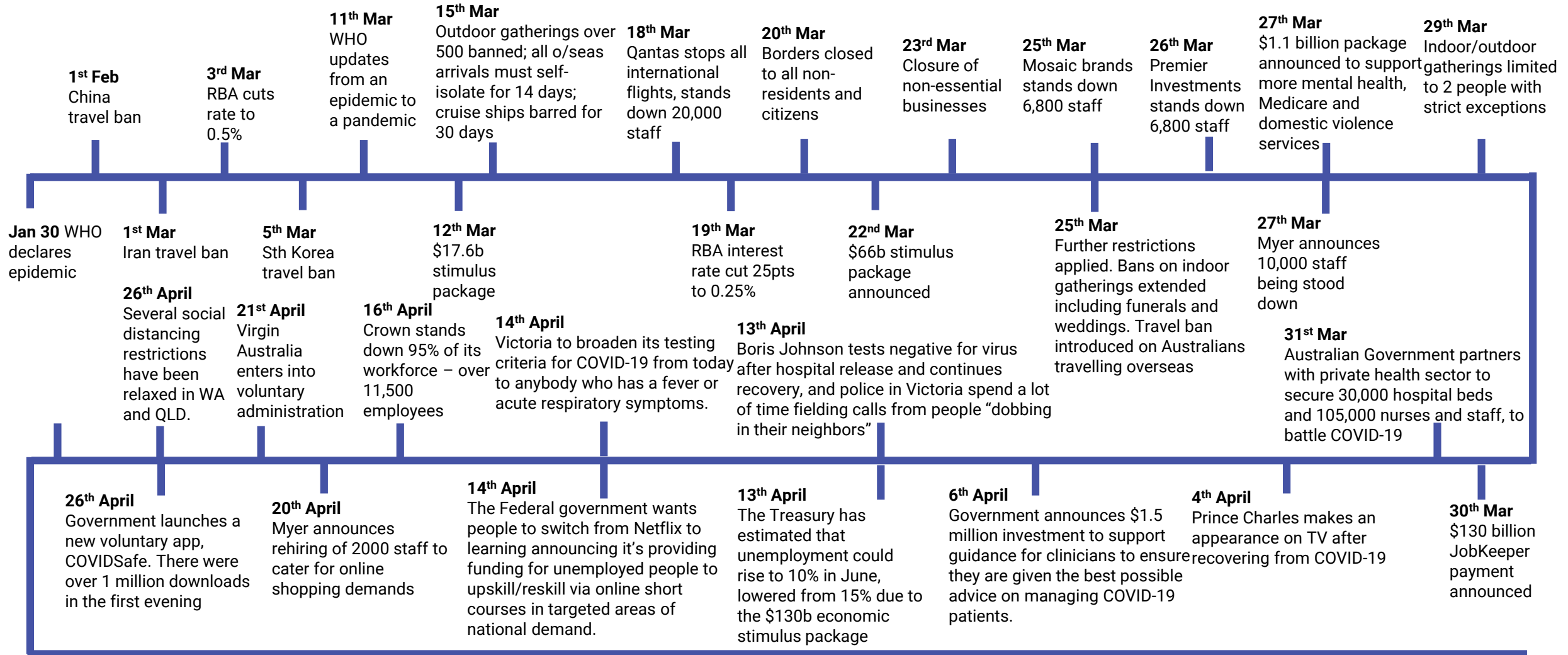
Purpose of SEEK's COVID-19 Candidate Sentiment Monitor



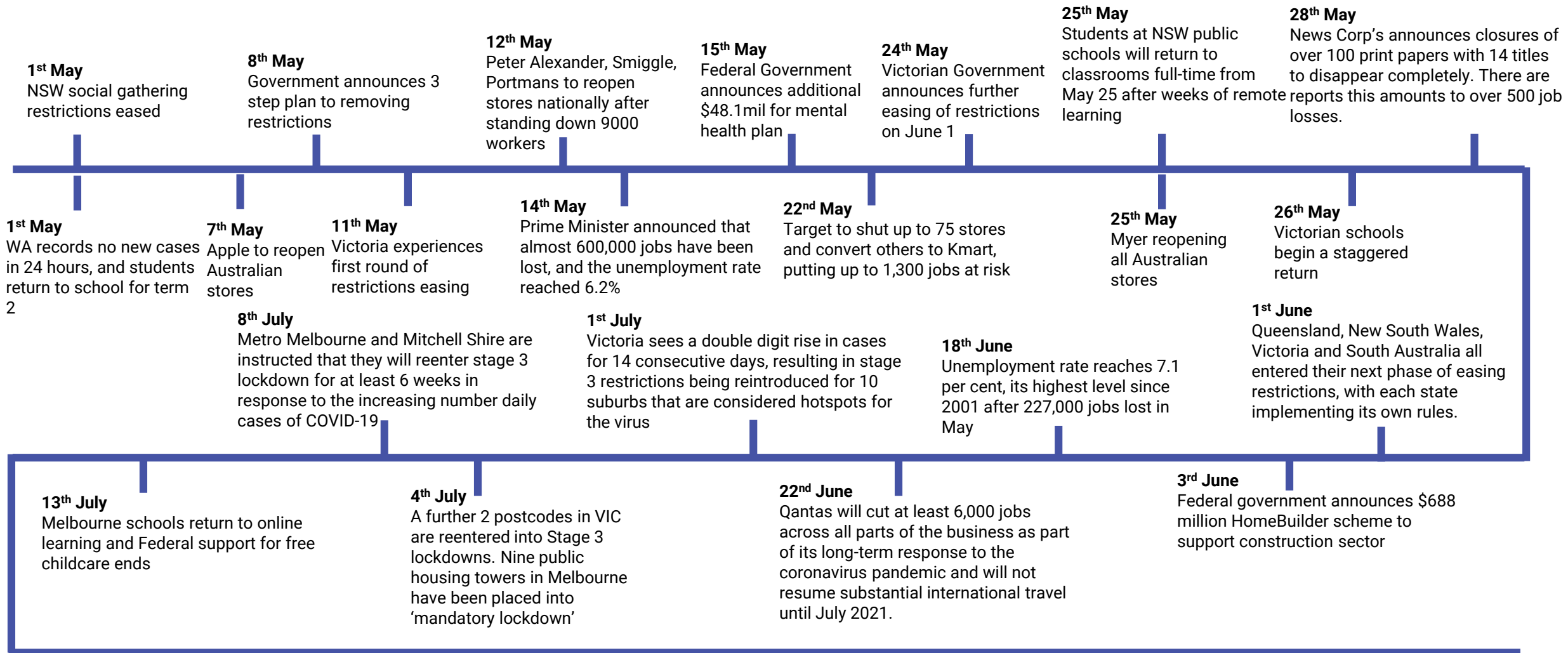
This report is designed to keep you connected and informed on the current candidate sentiment, in light of the COVID-19 pandemic.

Note: The situation and accompanying data/metrics are changing rapidly and frequently, so please ensure you are referring to the latest version of this report

COVID-19 Key events



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21st July

Announcement made that from the end of September through to January, JobKeeper payments will be extended but reduced to \$1200 a fortnight for full-time workers. People working less than 20 hours a week will have their JobKeeper payment cut to \$750 a fortnight. From Jan 2021, payments will be further reduced with a new end date of Mar 2021,

21st July

The coronavirus supplement for JobSeeker recipients will drop from a current \$550 to \$250 at the end of September, and remain at that rate until the end of the year.

23rd July

Masks become mandatory in Victoria

29rd July

New South Wales recorded more than 150 COVID-19 cases in two weeks, a worrying sign the situation could spiral out of control.

2nd August

Melbourne enters into stage 4 lockdown for 6 weeks including an overnight curfew. Regional Victoria including Mitchell Shire will move to Stage 3 restrictions.

4th August

Vic Premier Daniel Andrews announced 3 lists that will apply during Stage 4 restrictions. These changes, in addition to the previous restrictions, will mean around 1 million Victorians are no longer moving around the state for work.

Latest stats as at 11th August 2020

20,254,685
confirmed cases
globally

21,397
confirmed cases in
Australia

14,957
confirmed cases
in Victoria

12,134 total cases recovered

SEEK's COVID-19 Candidate Sentiment Monitor - key findings

1

As the second wave of cases increases, we've seen a significant drop in candidates feeling 'in control' of their working life, especially amongst Victorian and NSW workers

2

Among active job seekers, confidence in finding a job reached its lowest point of the year (43% in July compared to 60% in Feb).

3

More than 1 in 3 candidates are hesitant to change jobs. Candidate availability in key classifications are now below pre-COVID levels - Trades, Manufacturing & Transport, Farming, Education and Community Services

4

With job ads in professional services taking the longest to recover, competition for many office-based roles remain higher than pre-COVID levels.

5

WFH and flexible hours will be more commonly expected. If candidates are given a choice, most would want to work from home for at least one day per week, especially amongst those living further away from work.



**What the external
research is showing**

What external research has been released this month....?

Ongoing tracking of Australian sentiment towards COVID-19. 20 minute online survey from Friday 27th March–31st July, 2020. n=7,700 Australians, bi-weekly pulses of n=200 (Data collected Monday and Thursday, weekly)

Concern for COVID is at a record high in Victoria as the situation continues to worsen. In NSW and QLD, concern is high but relatively stable. Nationally, confidence in the government is up but in Victoria confidence is hitting record lows. More Australians now support mandatory face masks, with support highest in Victoria. Concerns about job security also see a slight increase.

CONCERN ABOUT COVID-19

Key Attitudes

Since 23 July

+5

I have **confidence in the Government's ability** to handle this crisis (58%), noting has **fallen to 2nd lowest on record in Victoria (46%)**

-3

The **Government has been sending mixed messages** that are confusing for the public (41%)

Key Attitudes

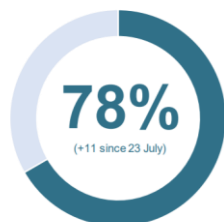
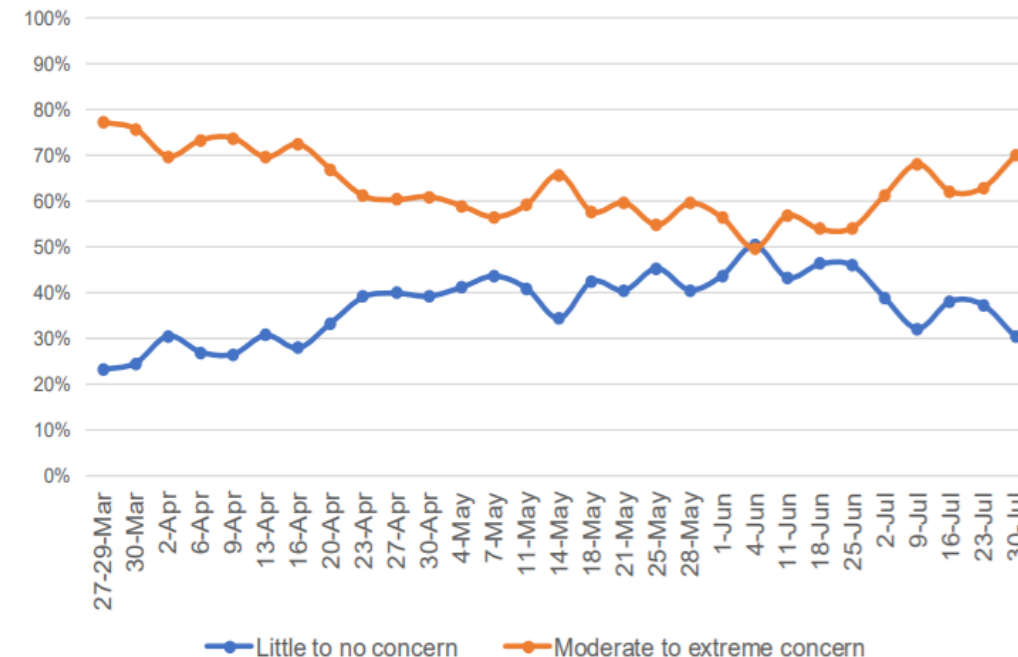
Since 23 July

+5

I'm **worried about job security** (44%)

-2

I feel **very secure financially** (31%)



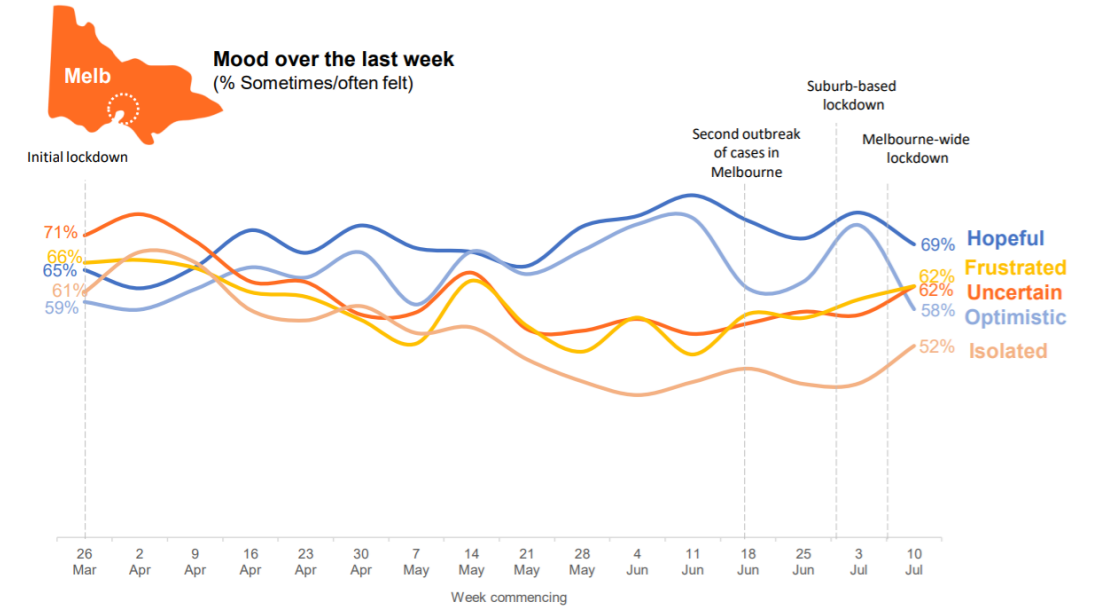
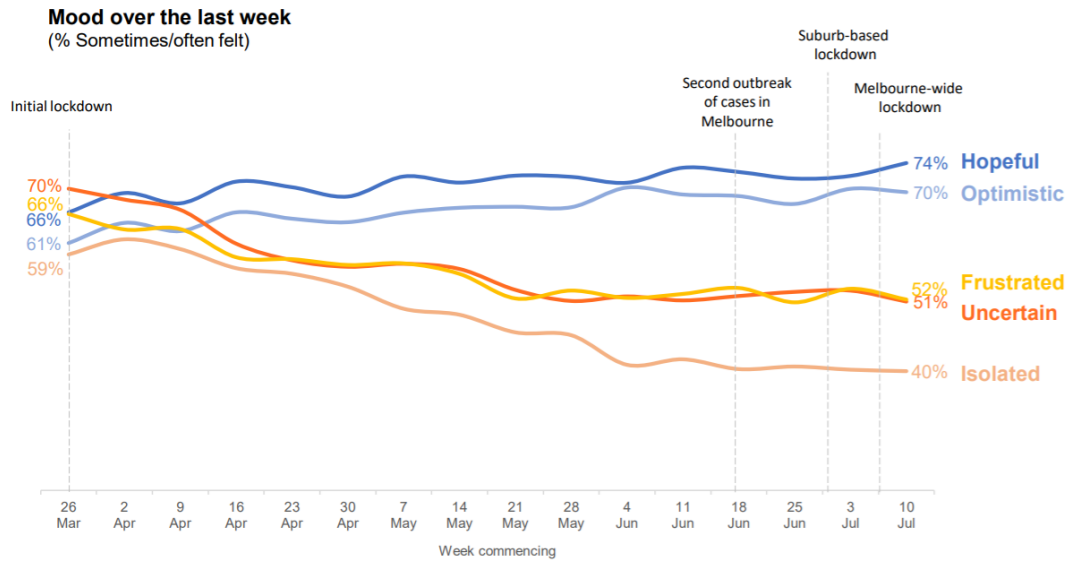
Support legislation that makes the wearing of face masks in public mandatory



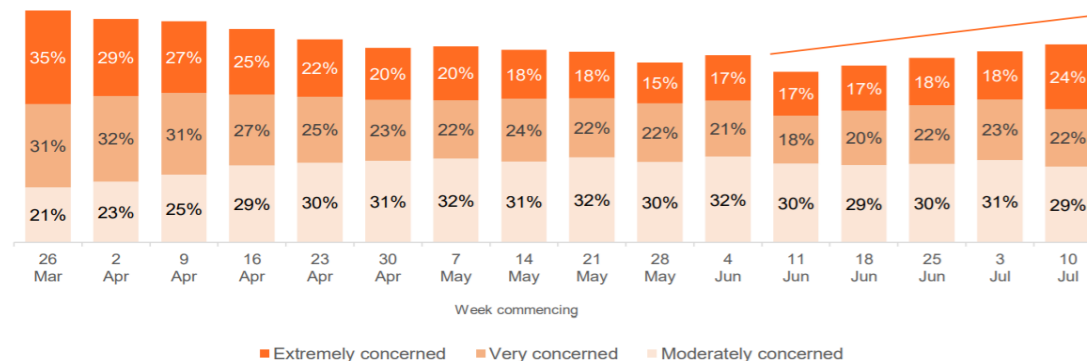
What external research has been released this month....?

Weekly tracking of Australian sentiment towards COVID-19. 26th March – 13th July 2020. n< 23,000

At an overall level, the mood of Australians has not been as affected by the events of recent weeks. Following the announcement of a 6-week lockdown, the mood of metro Melbourne residents resembles the peak of the crisis in March/April. National concern about the COVID-19 situation has been building gradually over the past month.



Concern about the COVID-19/coronavirus situation
(All Australians)



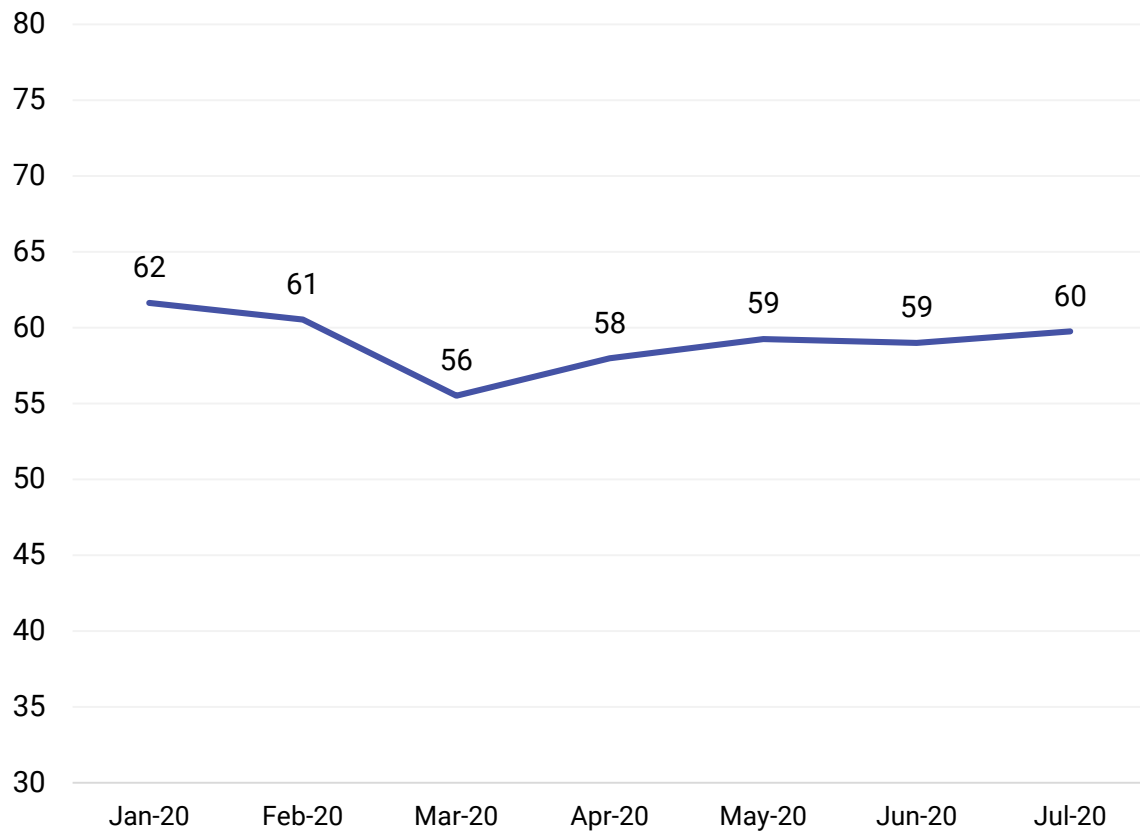
What the SEEK

data is revealing

At an overall level, candidates' optimism with their future employment prospects remains stable. However, younger candidates and those from VIC & NSW have seen a decline this month.



In general, how do you feel about your future employment/job prospects?

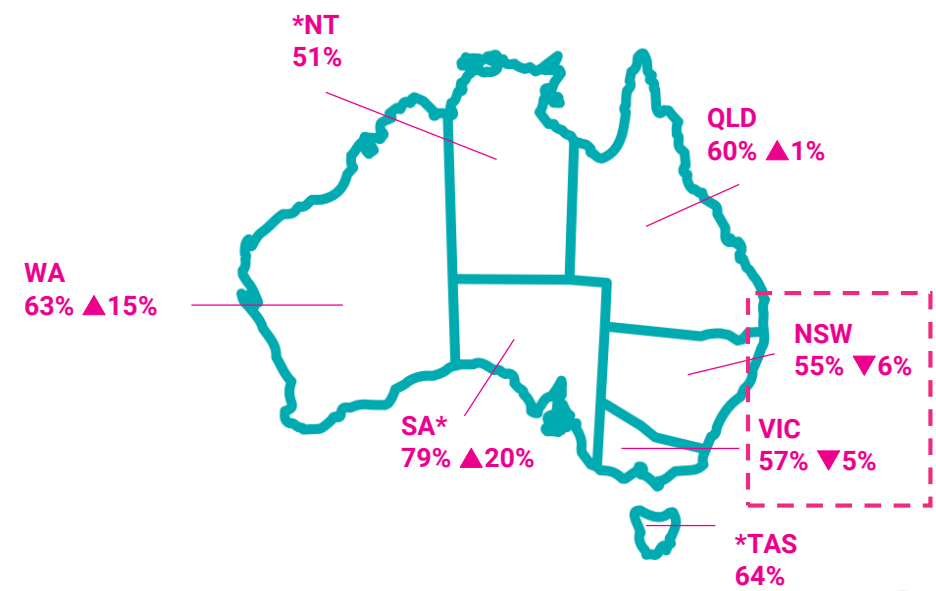


Sig. higher ▲/lower ▼ than the previous time period

Sig. higher/lower than the average of other groups

	Total	18-24	25-34	35-44	45-54	55+
% optimistic Jul-20	60%	49%	67%	66%	52%	61%
Compared Jun-20	1%	-16%	3%	5%	-5%	15%

	Total	Males	Females
% optimistic Jul-20	60%	65%	53%
Compared Jun-20	1%	5%	-4%



QOPT. In general, how do you feel about your future employment/job prospects? Give a 7-10 rating out of 10.

Base sizes: Jan-20 n=950; Feb-20 n=373, Mar-20 (5th – 16th, 27th – 29th) n=1122, Apr-20 (30th Mar – 3rd May) n=708, May-20 (4th – 31st May) n=607, June-20 (1st – 28th June) n=582, Jul-20 (29th June – 2nd Aug) n=403

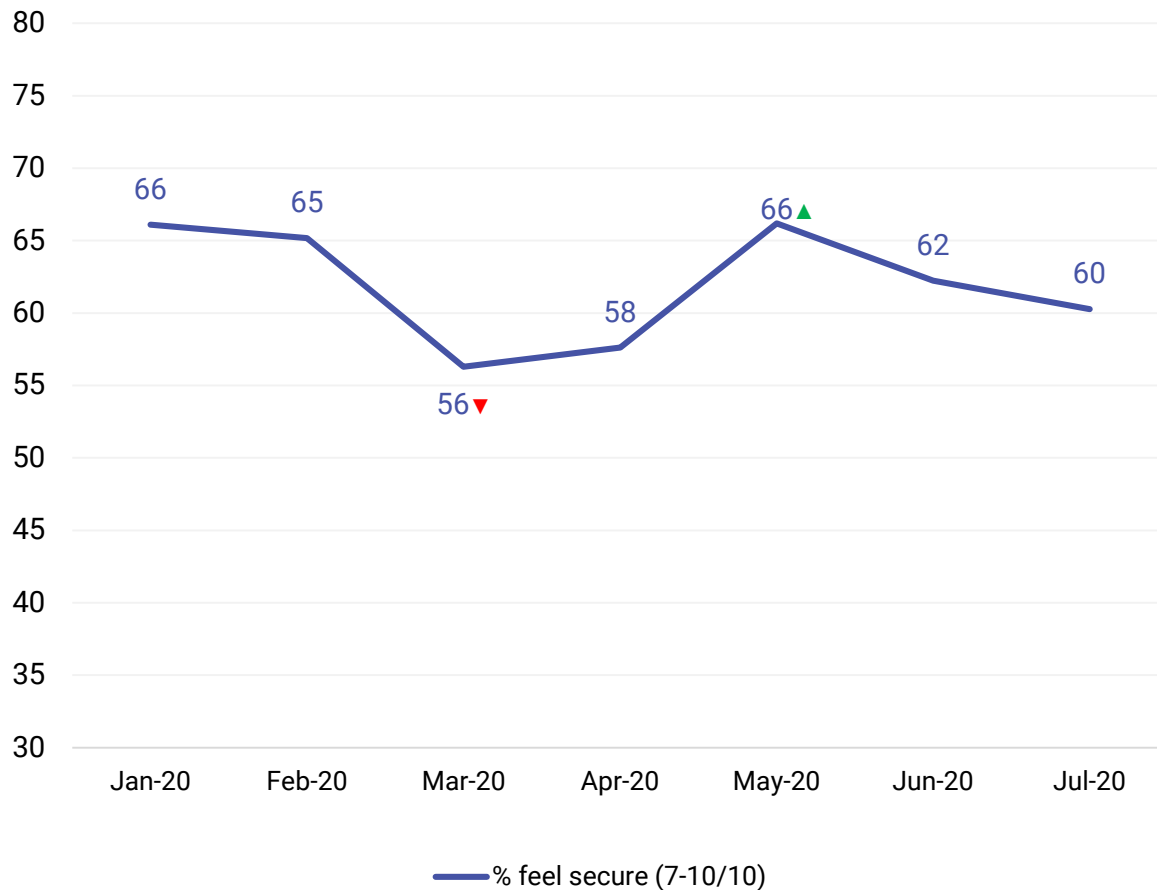


*Low sample- interpret with caution

Job security fell among those younger, female and living in Victoria.



How secure do you feel your current job is?

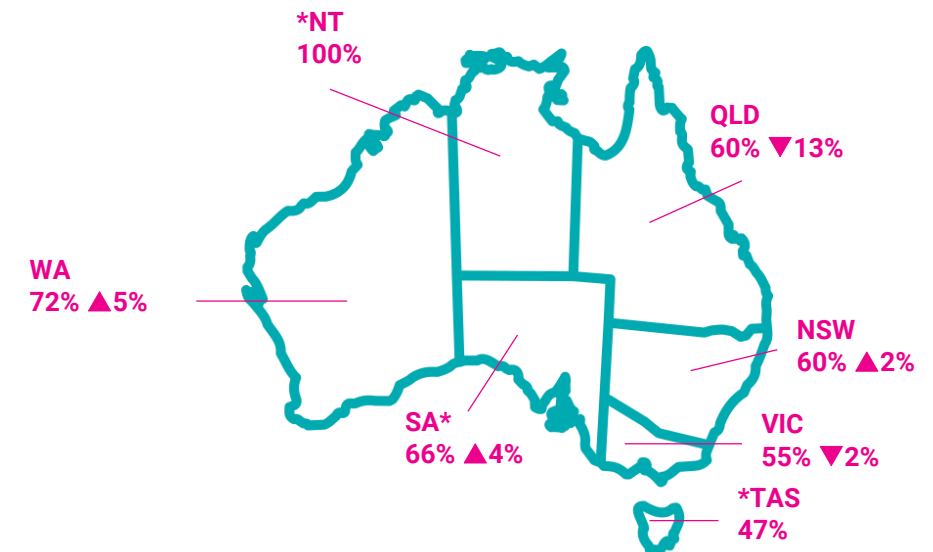


Sig. higher ▲/lower ▼ than the previous time period

Sig. higher/lower than the average of other groups

	Total	18-24	25-34	35-44	45-54	55+
% secure Jul-20	60%	56%	58%	60%	61%	68%
Compared Jun-20	-2%	-19%	-4%	5%	-8%	15%

	Total	Males	Females
% secure Jul-20	60%	65%	54%
Compared Jun-20	-2%	2%	-7%



QSEC. How secure do you feel your current job is? Give a 7-10 rating out of 10

Base sizes: Jan-20 n=950; Feb-20 n=373, Mar-20 (5th – 16th, 27th – 29th) n=1122, Apr-20 (30th Mar – 3rd May) n=708, May-20 (4th – 31st May) n=607, June-20 (1st – 28th June) n=582, Jul-20 (29th June – 2nd Aug) n=403

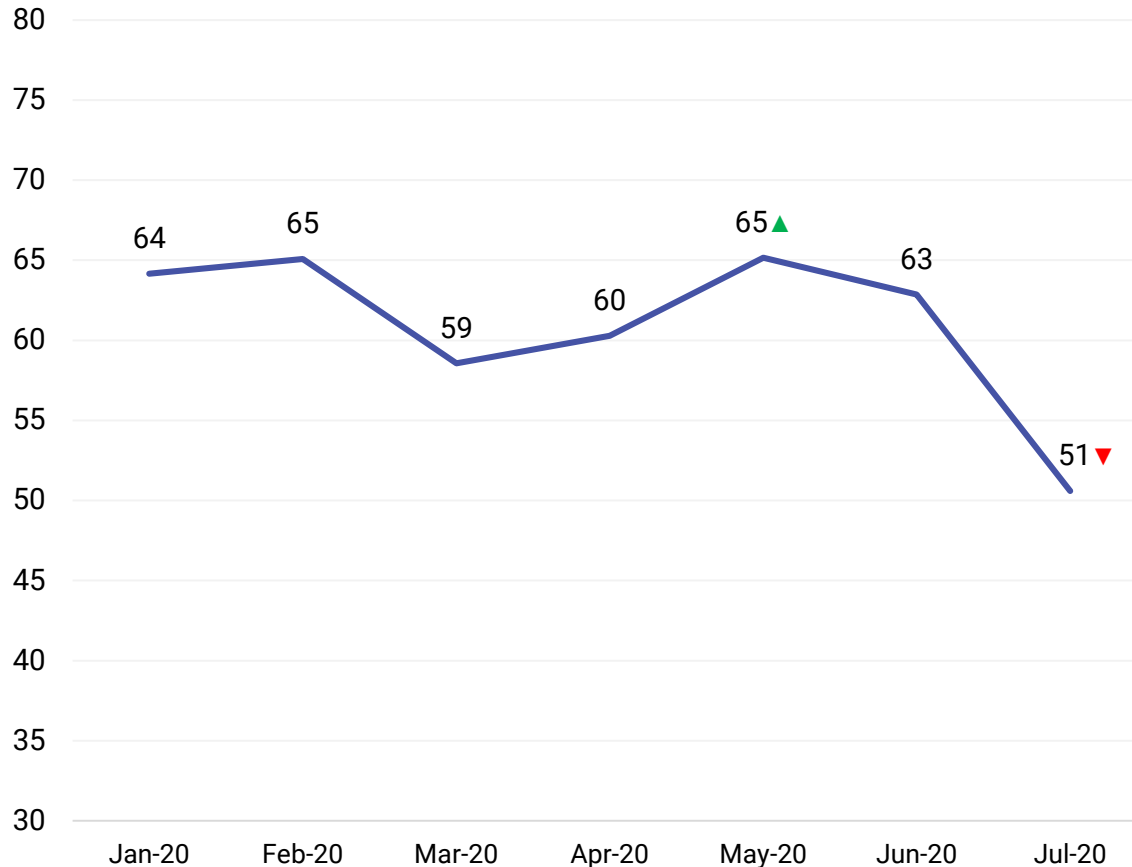


*Low sample- interpret with caution

We've seen a significant drop in candidates feeling 'in control' of their working life, especially amongst Victorian and NSW workers.



How 'in control' of your working life do you feel?

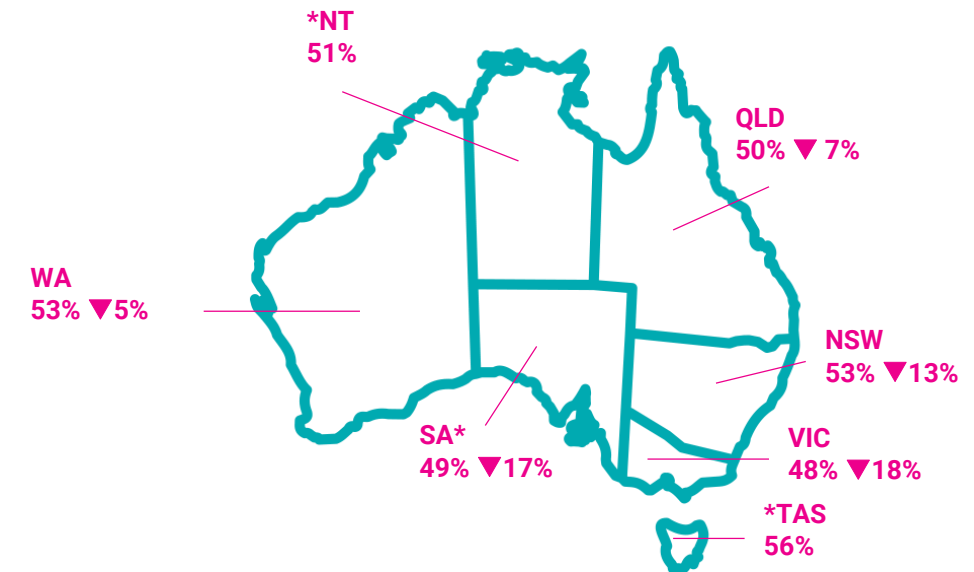


Sig. higher ▲/lower ▼ than the previous time period

Sig. higher/lower than the average of other groups

	Total	18-24	25-34	35-44	45-54	55+
% in control Jul-20	51%	29%	53%	51%	54%	64%
Compared Jun-20	-12%	-19%	-15%	-17%	-6%	-2%

	Total	Males	Females
% in control Jul-20	51%	50%	51%
Compared Jun-20	-12%	-16%	-8%



CD1. How 'in control' of your working life do you feel? Give a 7-10 rating out of 10

Base sizes: Jan-20 n=1014; Feb-20 n=406, Mar-20 (5th – 16th, 27th – 29th) n=1205, Apr-20 n=766, May-20 (4th – 31st May) n=626, June-20 (1st – 28th June) n=611, Jul-20 (29th June – 2nd Aug) n=422



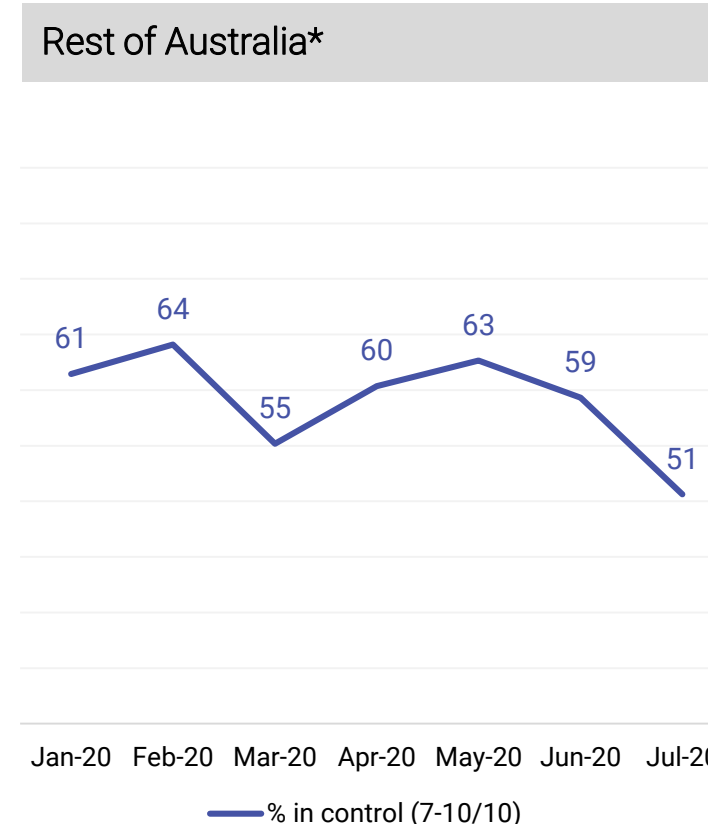
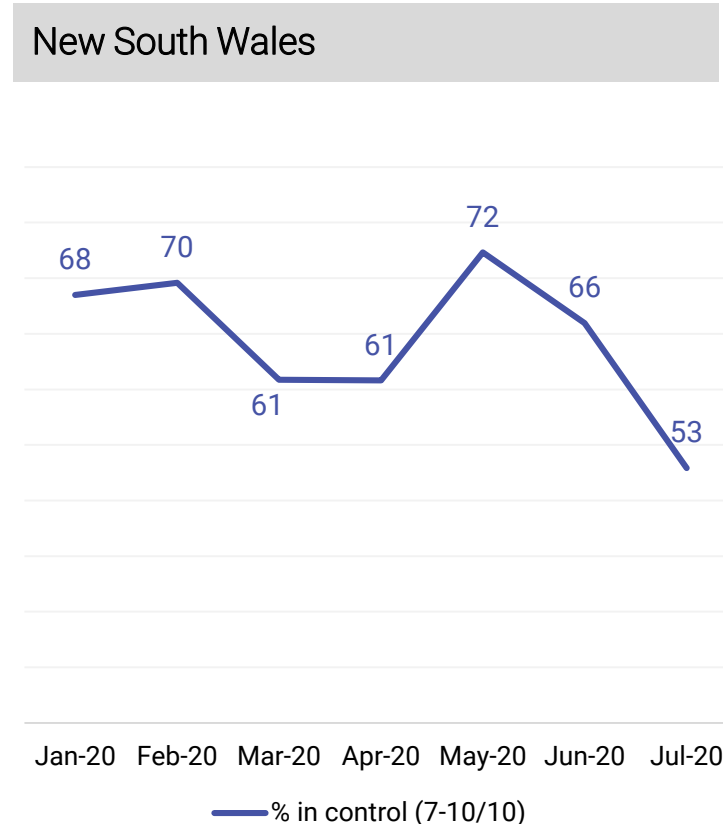
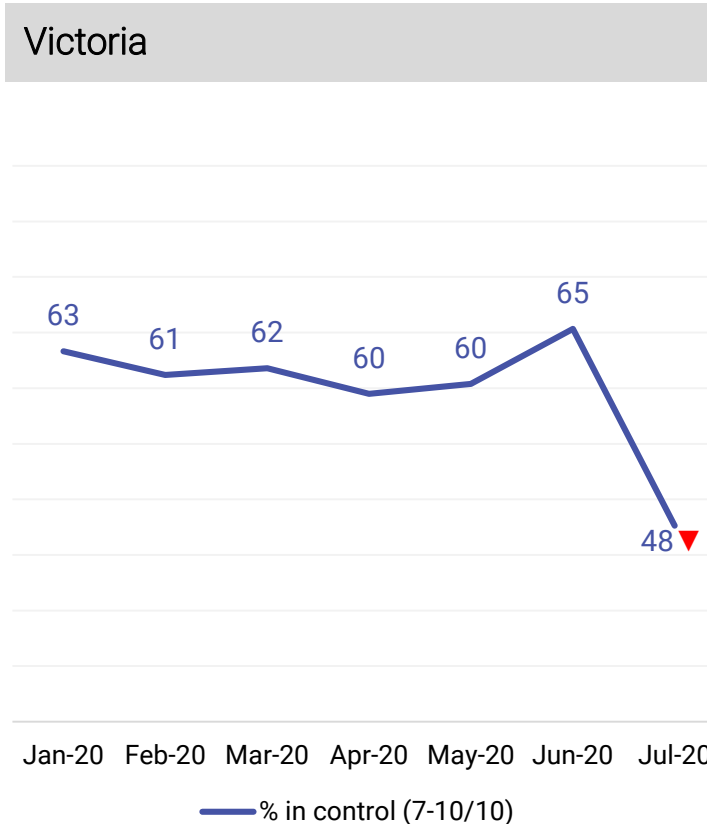
*Low sample- interpret with caution

Victorians' feeling of being in control was not impacted as much by the first wave of COVID-19. However, they feel significantly less in control during this second wave.



Candidates in the other states also feel less in control of their working life in recent months

How 'in control' of your working life do you feel?



Sig. higher ▲/lower ▼ than the previous time period

*Rest of Australia includes QLD, SA, NT, WA & Tas

CD1. How 'in control' of your working life do you feel? Give a 7-10 rating out of 10

Base sizes Vic: Jan-20 n=253; Feb-20 n=101, Mar-20 (5th – 16th, 27th – 29th) n=308, Apr-20 (30th Mar – 3rd May) n=202, May-20 (4th – 31st May) n=165, June-20 (1st – 28th June) n=157 Jul-20 (29th June – 2nd Aug) n=115

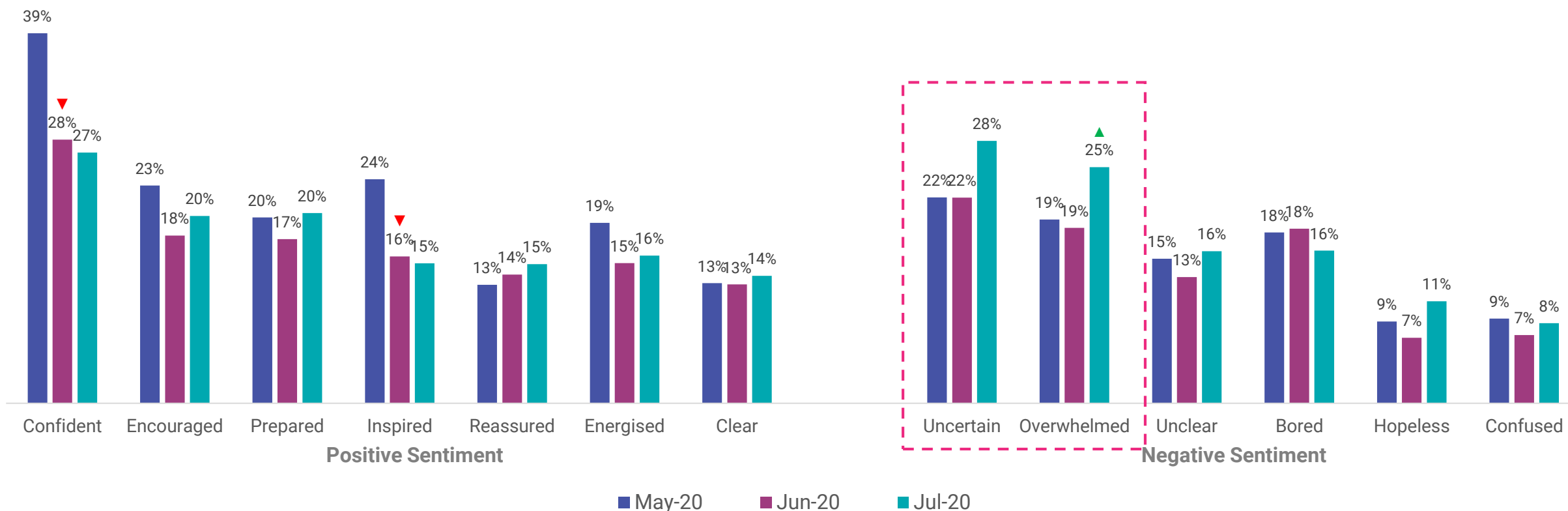
Base sizes NSW: Jan-20 n=325; Feb-20 n=131, Mar-20 (5th – 16th, 27th – 29th) n=378, Apr-20 (30th Mar – 3rd May) n=230, May-20 (4th – 31st May) n=196 June-20 (1st – 28th June) n=199, Jul-20 (29th June – 2nd Aug) n=132

Base sizes: Rest of Australia Jan-20 n=436 Feb-20 n=174, Mar-20 (5th – 16th, 27th – 29th) n=519, Apr-20 (30th Mar – 3rd May) n=334 May-20 (4th – 31st May) n=264, June-20 (1st – 28th June) n=255, Jul-20 (29th June – 2nd Aug) n=175

More candidates are feeling overwhelmed and uncertain about their working life.



Generally, how does your working life make you feel?



Sig. higher ▲/lower ▼ than the previous time period

CD2 - Generally, how does your working life make you feel?

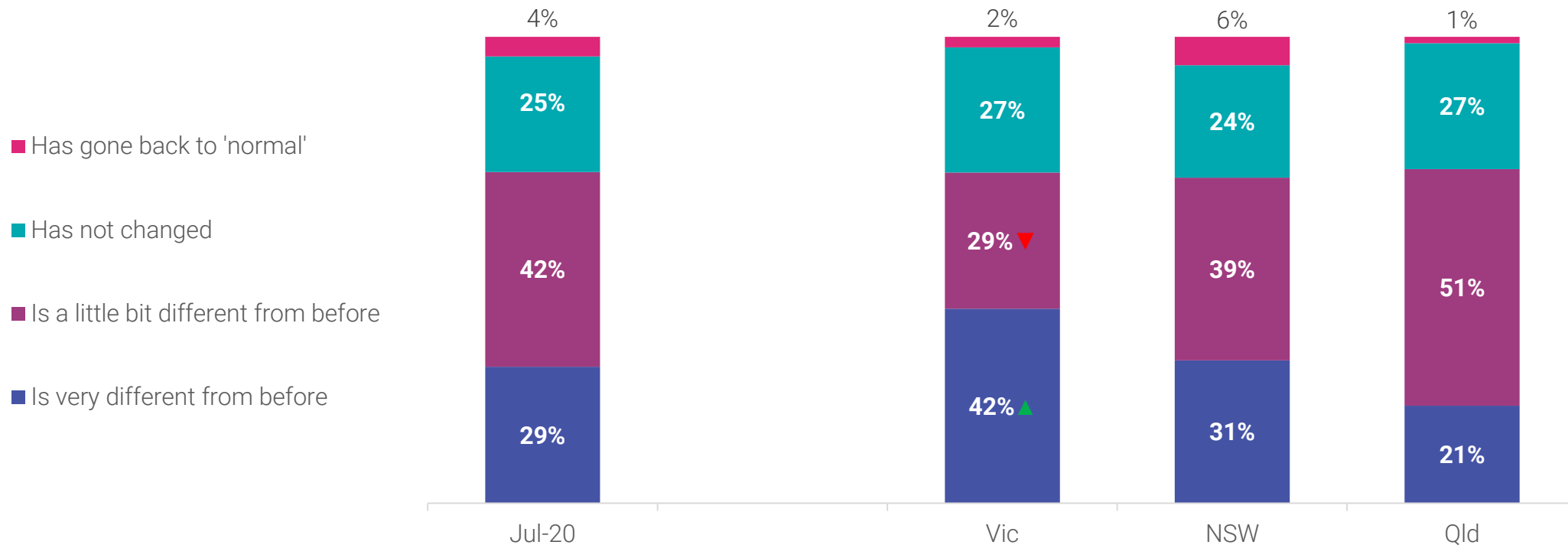
Base sizes: Pre-COVID (Jan-20/Feb-20) n=1420, Mar-20 (5th – 16th, 27th – 29th) n=1205, Apr-20 n=766, May-20 (4th – 31st May) n=626, June-20 (1st – 28th June) n=611, Jul-20 (29th June – 2nd Aug) n=422



Not surprisingly, 2 in 5 candidates in Victoria think their working circumstances are very different from before, significantly higher than the other states



As a result of COVID-19, your current working situation... (July-20)

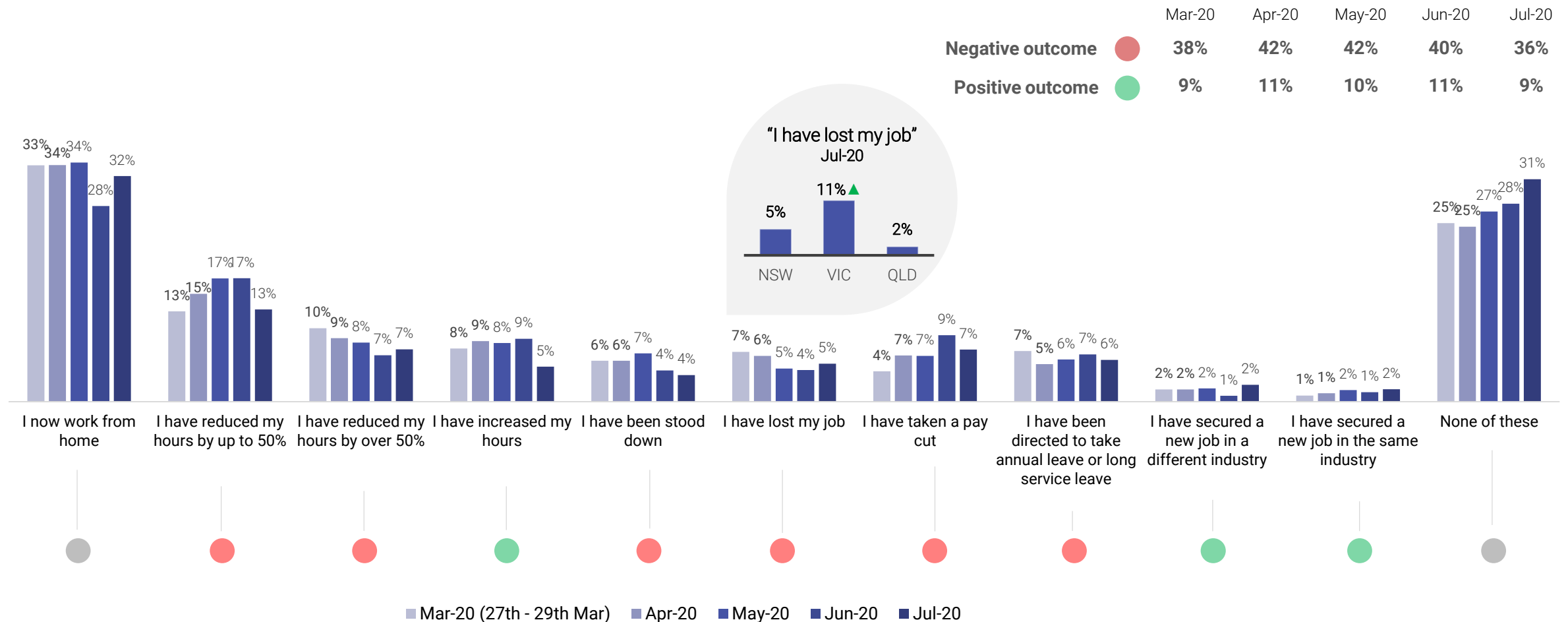


Sig. higher ▲/lower ▼ than the previous time period

More candidates have returned to WFH in July as venues and workplaces closed under the new restrictions in Vic. 1 in 9 Victorian candidates claimed to have lost their jobs due to COVID.



As a result of COVID-19, which of the following have you experienced?



COVID-19_2 - As a result of COVID-19, which of the following have you experienced?

Base sizes: Mar-20 (27th - 29th) n=800, Apr-20 (30th Mar - 3rd May) n=766, May-20 (4th - 31st May) n=626, June-20 (1st - 28th June) n=611, Jul-20 (29th June - 2nd Aug) n=422

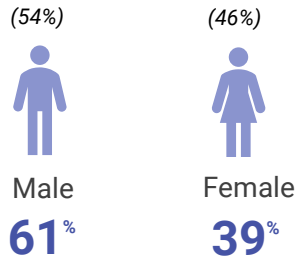
Active job seekers are more likely to be young candidates aged 18 – 24 who are in junior level roles. 1 in 4 of them are currently unemployed.



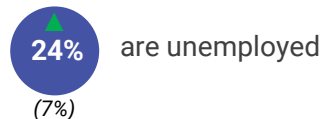
Active Job Seekers' profile

(vs. Total market)

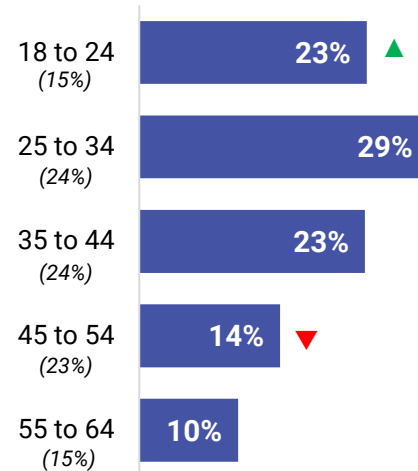
Gender



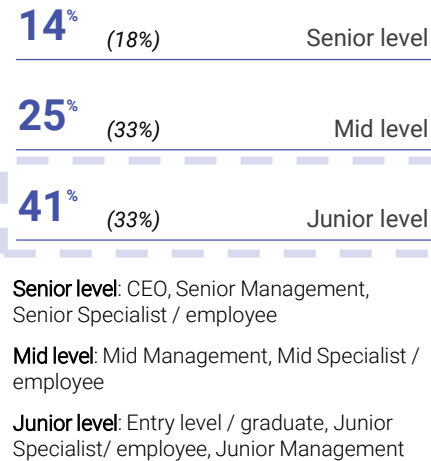
Unemployment



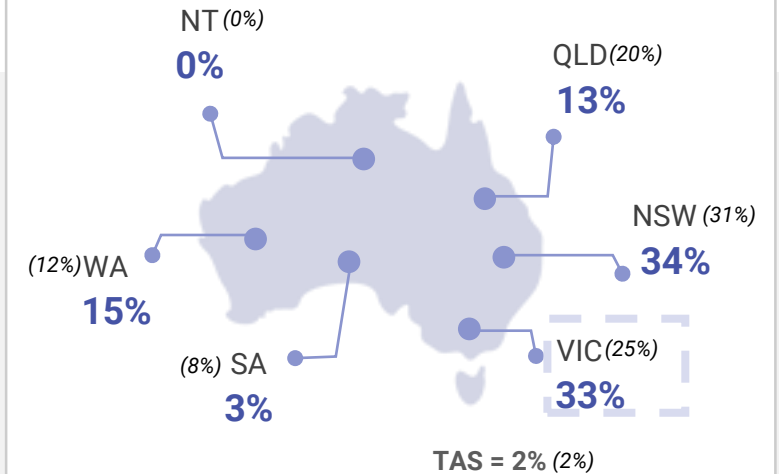
Age



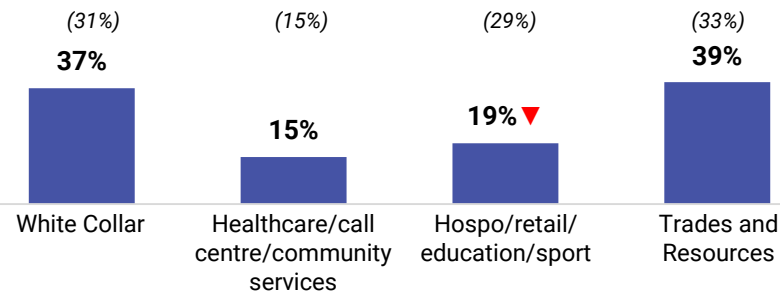
Job level



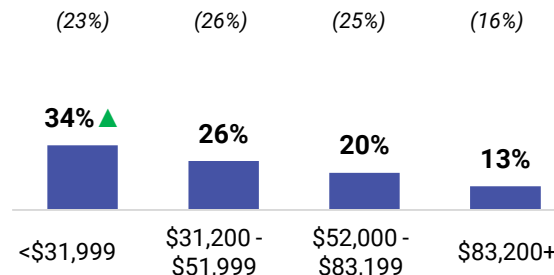
States



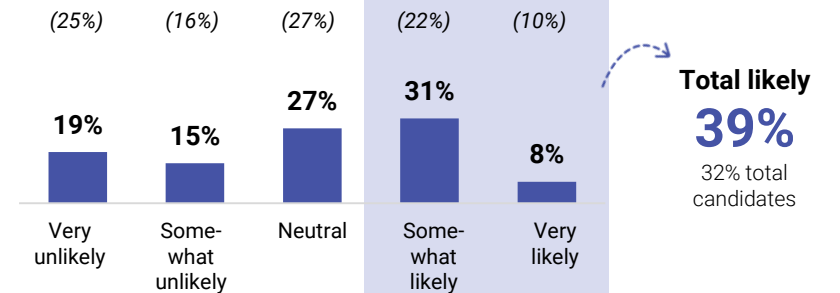
Industry groups



Income (Current/latest)



Likelihood to consider moving for a job



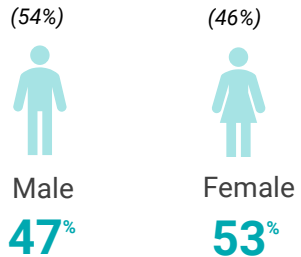
Passive candidates who are not doing anything to look for jobs skew towards 55-64 years old. They are also more likely to be from NSW or QLD.



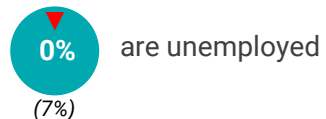
Passive candidates' profile

(vs. Total market)

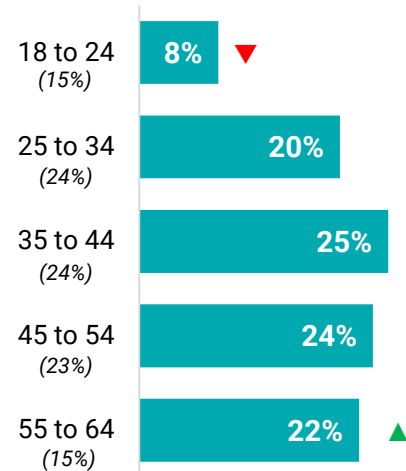
Gender



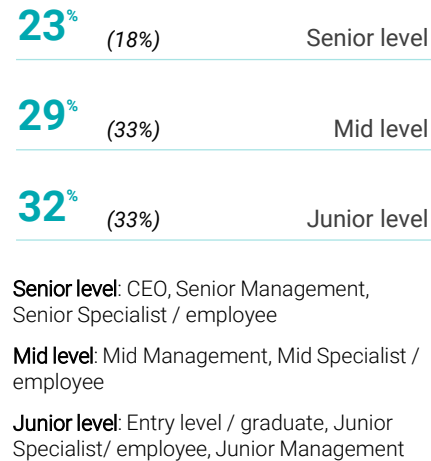
Unemployment



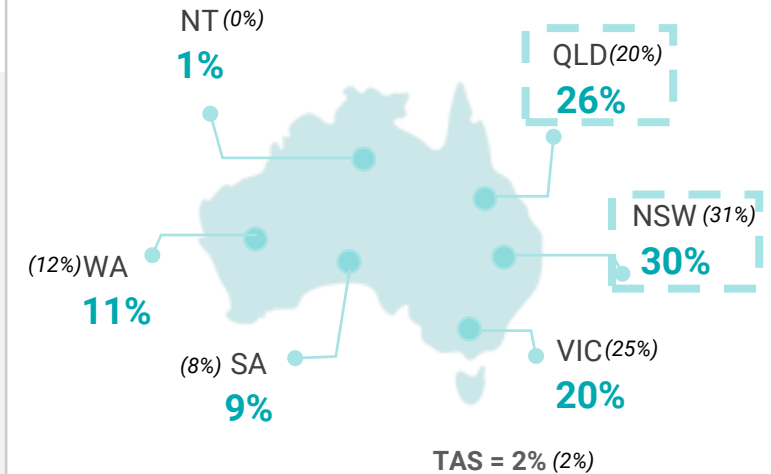
Age



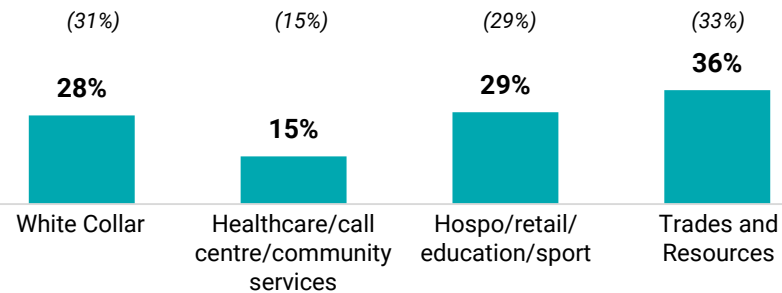
Job level



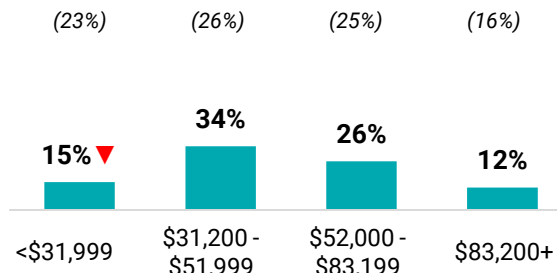
States



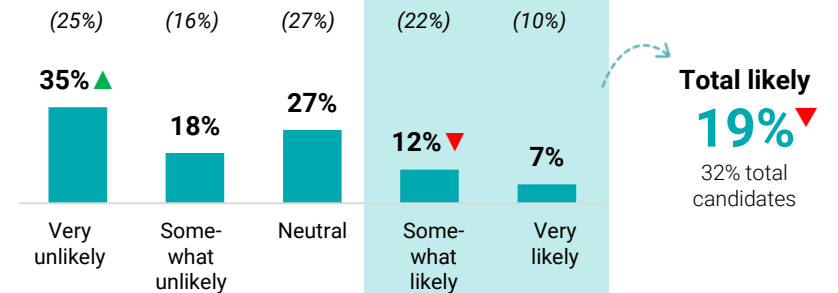
Industry groups



Income (Current/latest)



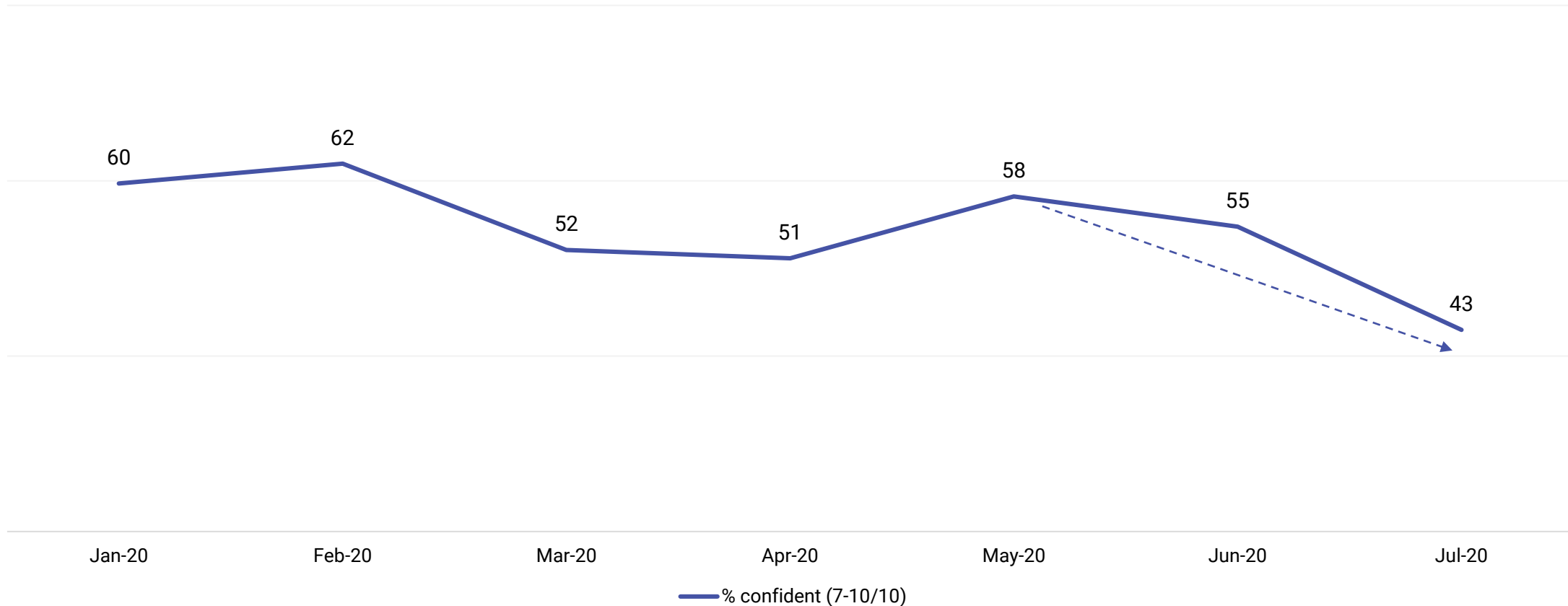
Likelihood to consider moving for a job



Amongst active job seekers, confidence in finding a job reached its lowest point of the year.



How confident are you in finding a job? (amongst Active Job Seekers)



Sig. higher ▲ /lower ▼ than the previous time period

E1C - How confident are you in finding a job? Give a 7-10 rating out of 10

Base sizes Total sample: Jan-20 n=150, Feb-20 n=61, Mar-20 (5th - 16th, 27th - 29th) n=169, Apr-20 (30th Mar - 3rd May) n=198, May-20 (4th - 31st May) n=154, June-20 (1st - 28th June) n=132, Jul-20 (29th June - 2nd Aug) n=107

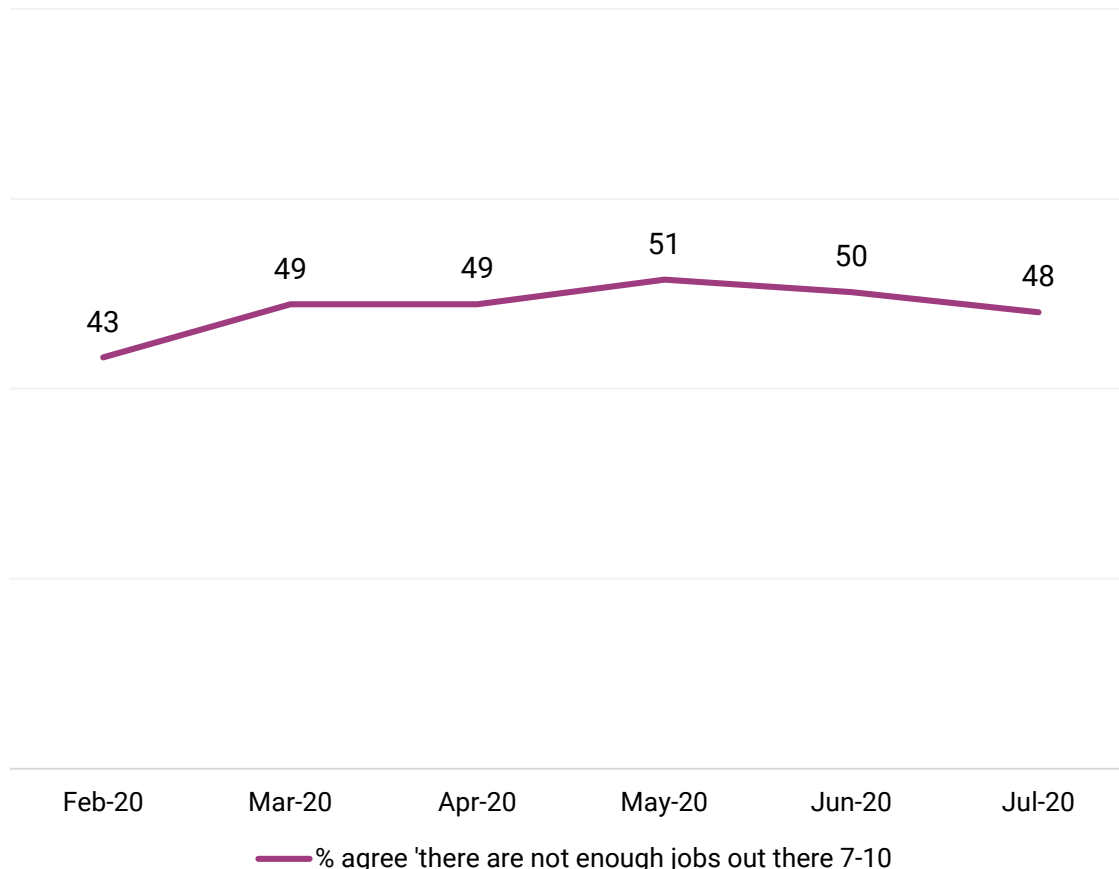
Base sizes Females: Jan-20/Feb-20 n=92, Mar-20 (5th - 16th, 27th - 29th) n=77, Apr-20 (30th Mar - 3rd May) n=101, May-20 (4th - 31st May) n=70, June-20 (1st - 28th June) n=58, Jul-20 (29th June - 2nd Aug) n=50

Base sizes Males: Jan-20/Feb-20 n=119, Mar-20 (5th - 16th, 27th - 29th) n=92, Apr-20 (30th Mar - 3rd May) n=97, May-20 (4th - 31st May) n=83, June-20 (1st - 28th June) n=74, Jul-20 (29th June - 2nd Aug) n=57

There are still close to 1 in 2 candidates who think there are 'not enough jobs' in the market. This perception has improved or remained stable in most states over the past month, except for Victoria.



Agreement to the statement 'there are not enough jobs out there'



Sig. higher ▲/lower ▼ than the previous time period

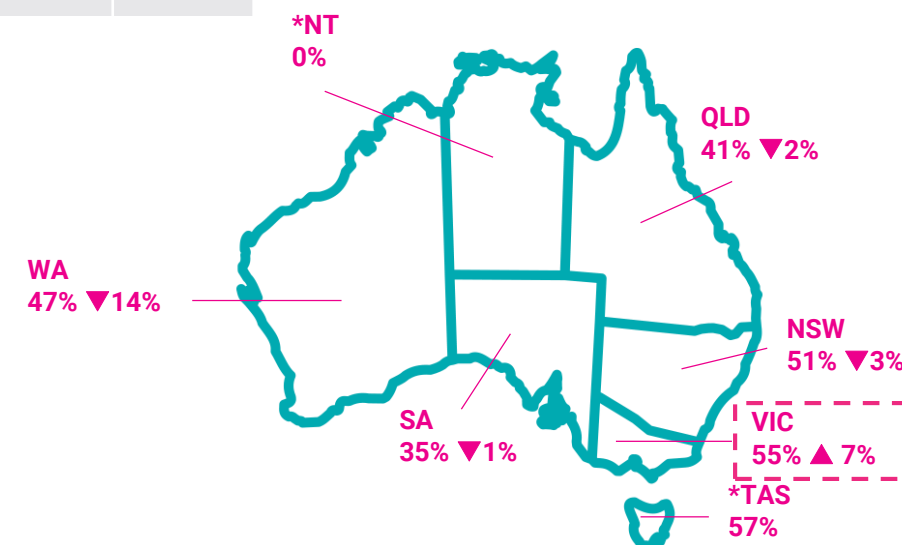
E5. 'There are just not enough jobs out there. Give a 7/9 to 10 rating out of 10

Base sizes Total sample: Not asked in Jan-20, Feb-20 n=406, Mar-20 (5th – 16th, 27th – 29th) n=1205, Apr-20 (30th Mar – 3rd May) n=766, May-20 (4th – 31st May) n=626, June-20 (1st – 28th June) n=611, Jul-20 (29th June – 2nd Aug) n=422

Sig. higher/lower than the average of other groups

	Total	18-24	25-34	35-44	45-54	55+
% agree 7-10 Jul-20	48%	46%	51%	39%	53%	53%
Compared Jun-20	-2%	1%	5%	-17%	2%	0%

	Total	Males	Females
% agree 7-10 Jul-20	48%	49%	47%
Compared Jun-20	-2%	-2%	-2%

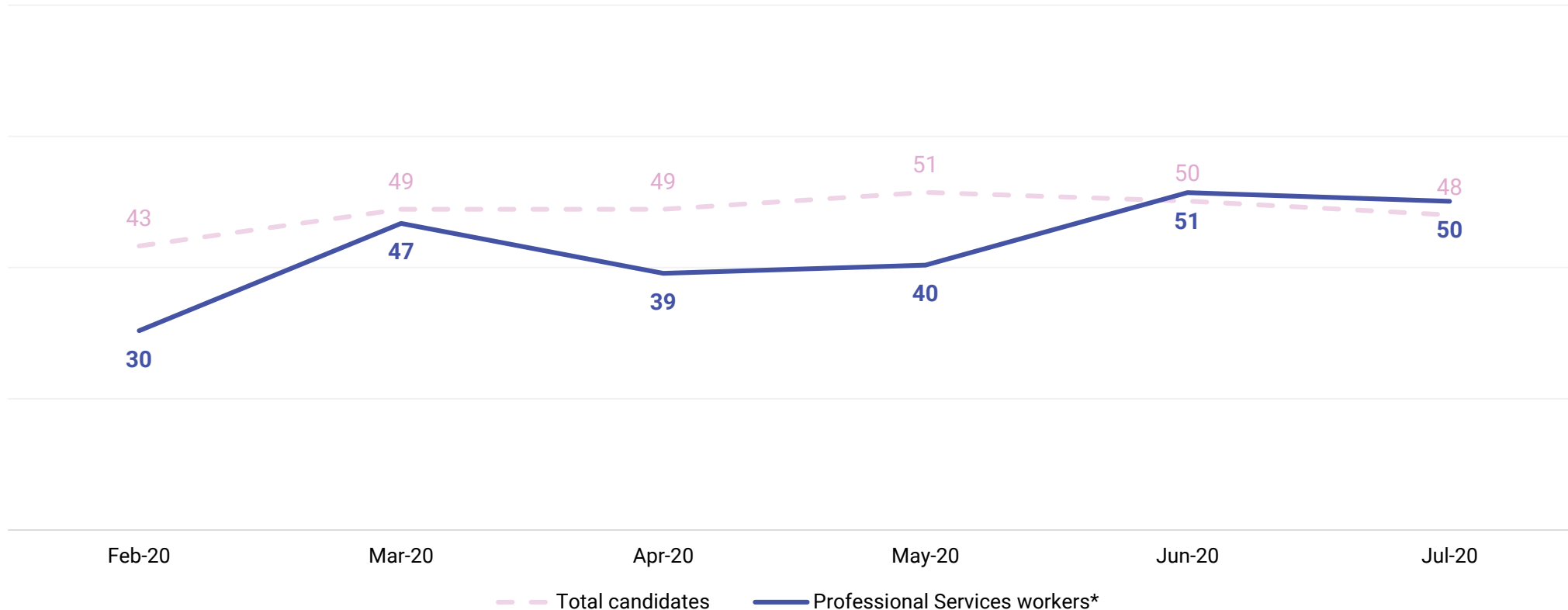


Over the last 2 months, we see more professional services workers perceive that there are not enough jobs in the market.



**Agreement to the statement
'there are not enough jobs out there'**

(% agree 7-10/10)



*Those who work in Account, Human Resources & Recruitment, Marketing & Communications, Banking & Financial Services, Legal, Science & Technology, Consulting & Strategy, Information & Communication Technology and Insurance & Superannuation

E5. 'There are just not enough jobs out there. Give a 7/9 to 10 rating out of 10

Base sizes Total sample: Jan-20 n=1014, Feb-20 n=406, Mar-20 (5th – 16th, 27th – 29th) n=1205, Apr-20 (30th Mar – 3rd May) n=766, May-20 (4th – 31st May) n=626, June-20 (1st – 28th June) n=611, Jul-20 (29th June – 2nd Aug) n=422

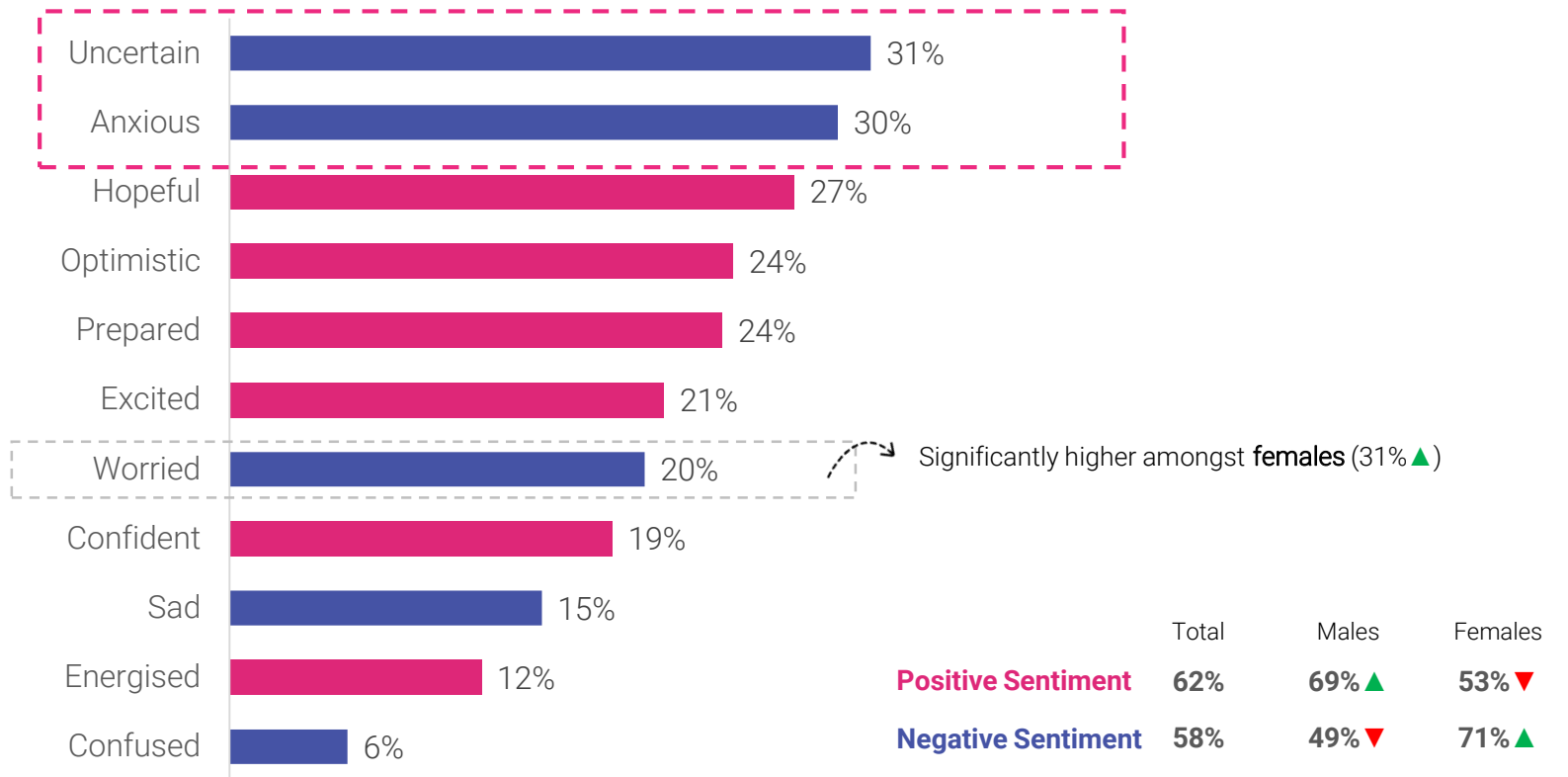
Base sizes Professional Services: Jan-20 n=190, Feb-20 n=71, Mar-20 (5th – 16th, 27th – 29th) n=242, Apr-20 (30th Mar – 3rd May) n=153, May-20 (4th – 31st May) n=145, June-20 (1st – 28th June) n=119, Jul-20 (29th June – 2nd Aug) n=85



Sentiment about going back to the workplace is led with uncertainty and anxiety.



Feelings about going back to the workplace (amongst those who are WFH)



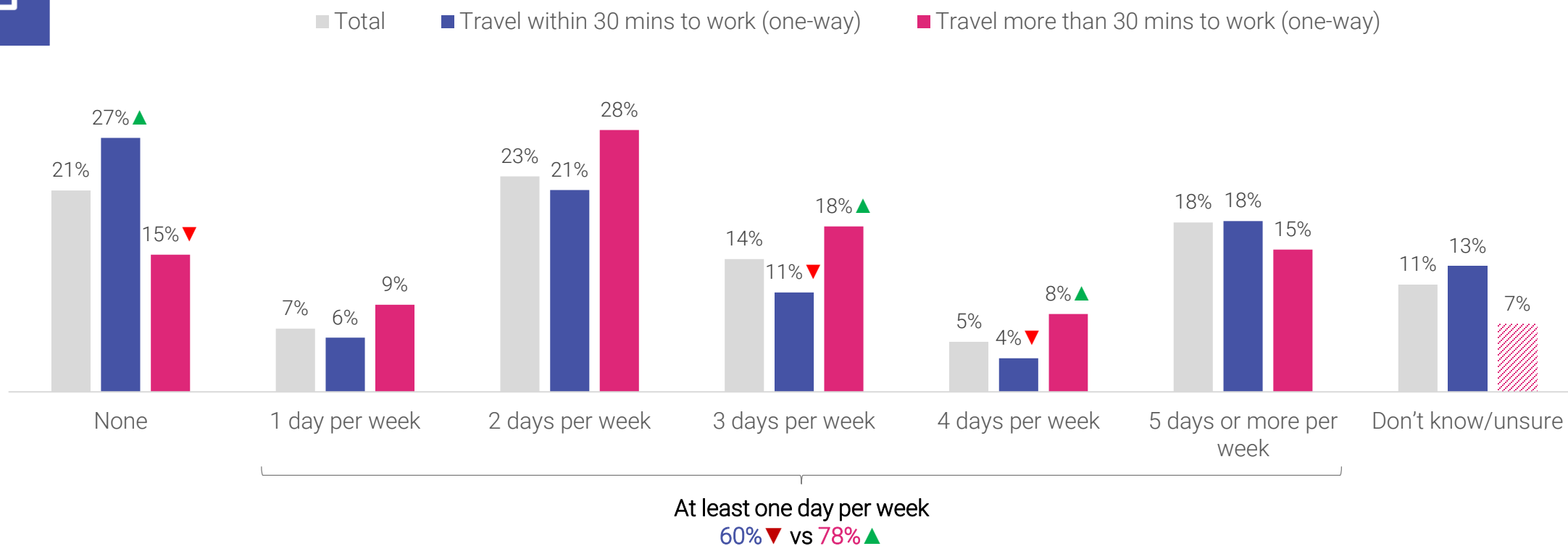
A10. Which of these following words best describes how you feel about going back to your workplace?

Base: Those who are working from home n=203

If candidates are given a choice, most would want to work from home for at least one day per week, especially amongst those living further away from work.



If you had the choice now, how many days would you like to ideally work from home (even once restrictions on COVID-19 are lifted)?



A12. If you had the choice now, how many days would you like to ideally work from home (even once restrictions on COVID-19 are lifted)?
Base: Total n=611, those who travel within 30 mins n=337, those who travel for more than 30 minutes n=245

▲▼ Sig. difference at 95% confidence between groups

Candidates will be more nervous about changing jobs, especially amongst those who have experienced significant changes due to COVID-19

Office workers are less inclined to change jobs in the near future, whereas more movements will be seen amongst candidates who work in sport, hospitality, retail and education

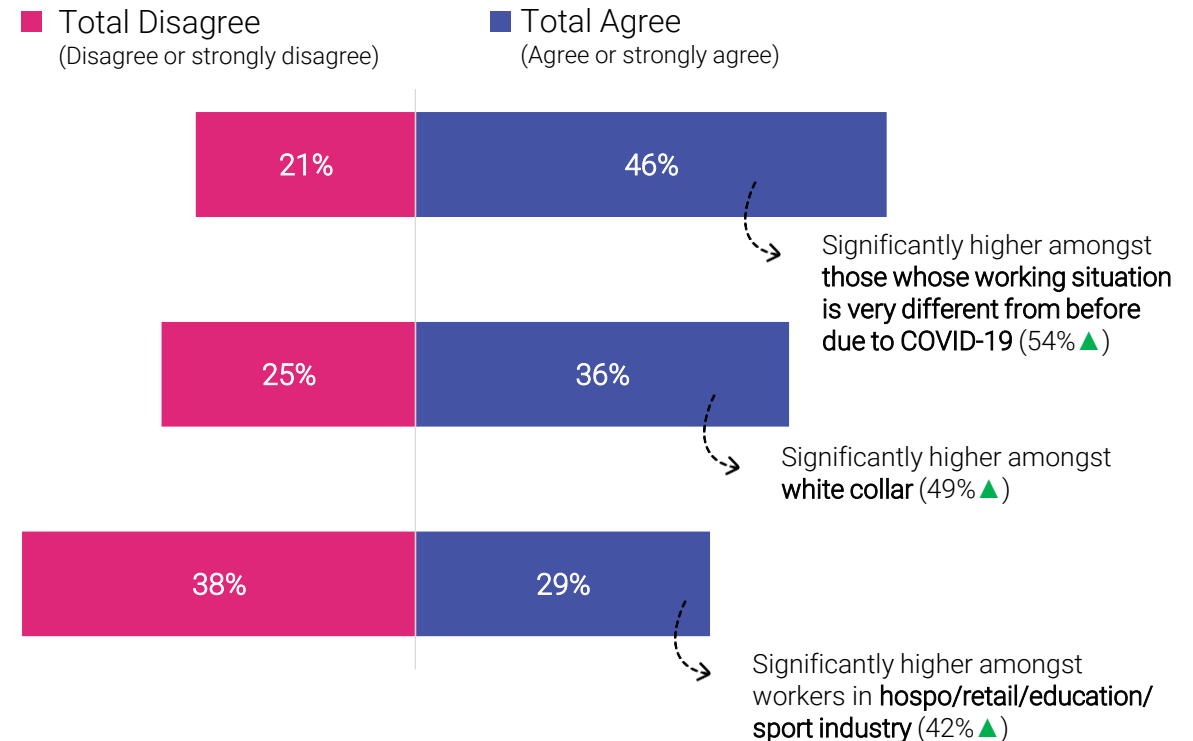
Attitudes toward changing jobs



I will be more nervous about changing jobs

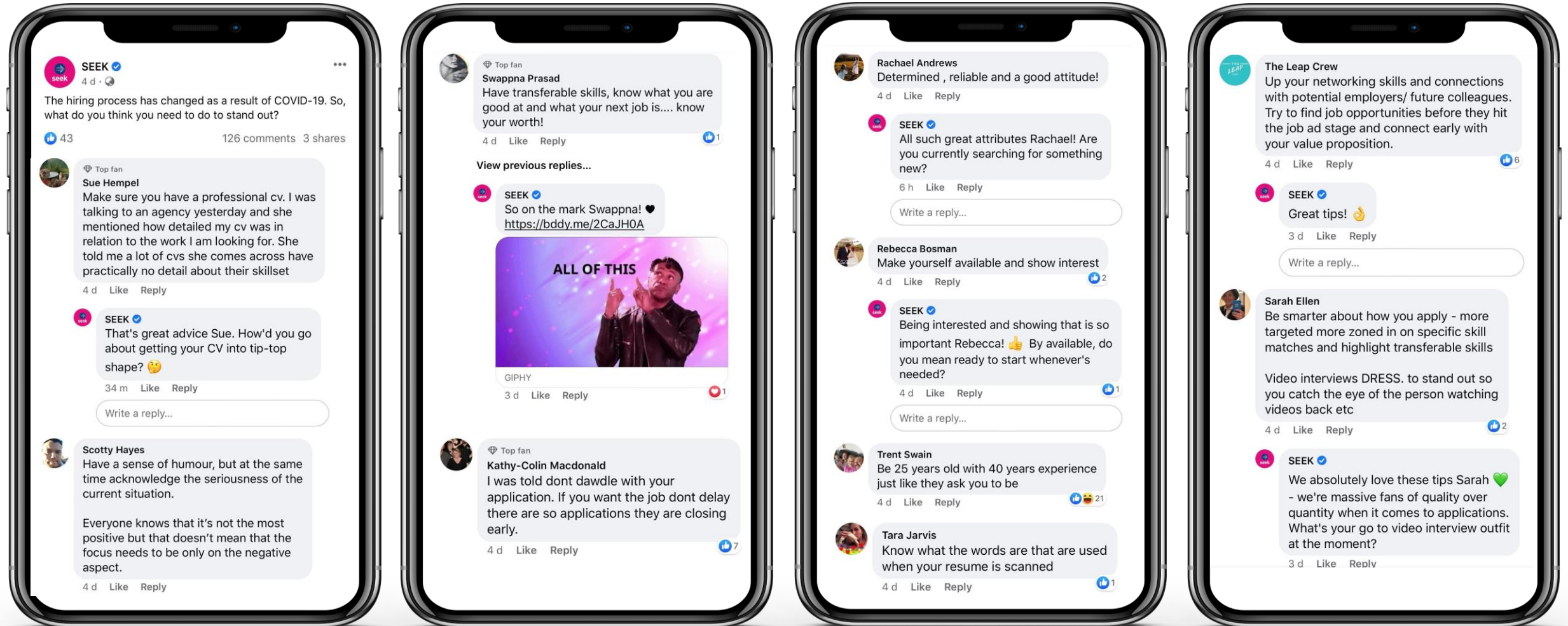
I'm less inclined to change jobs in the near future

I intend to change jobs once COVID-19 restrictions are eased and the market goes back to normal



A13. Now imagine all restrictions on COVID-19 have been lifted and everyone has gone back to the workplace. To what extent would you agree or disagree with the following statements? Base: Total n=611

Social Activity: Candidates are realising the importance of needing to stand out in a crowd and have some great ideas on how to do this.



Thank you.

