



INTRODUCTION

The Healthcare & Medical industry is Australia's largest, fastest-growing industry.

Its scale and growth are underpinned by significant drivers, including the introduction of the National Disability Insurance Scheme (NDIS) plus our nation's ageing population. COVID-19 has also placed greater attention – and pressure – on the industry since the pandemic's outbreak in Australia in early 2020.

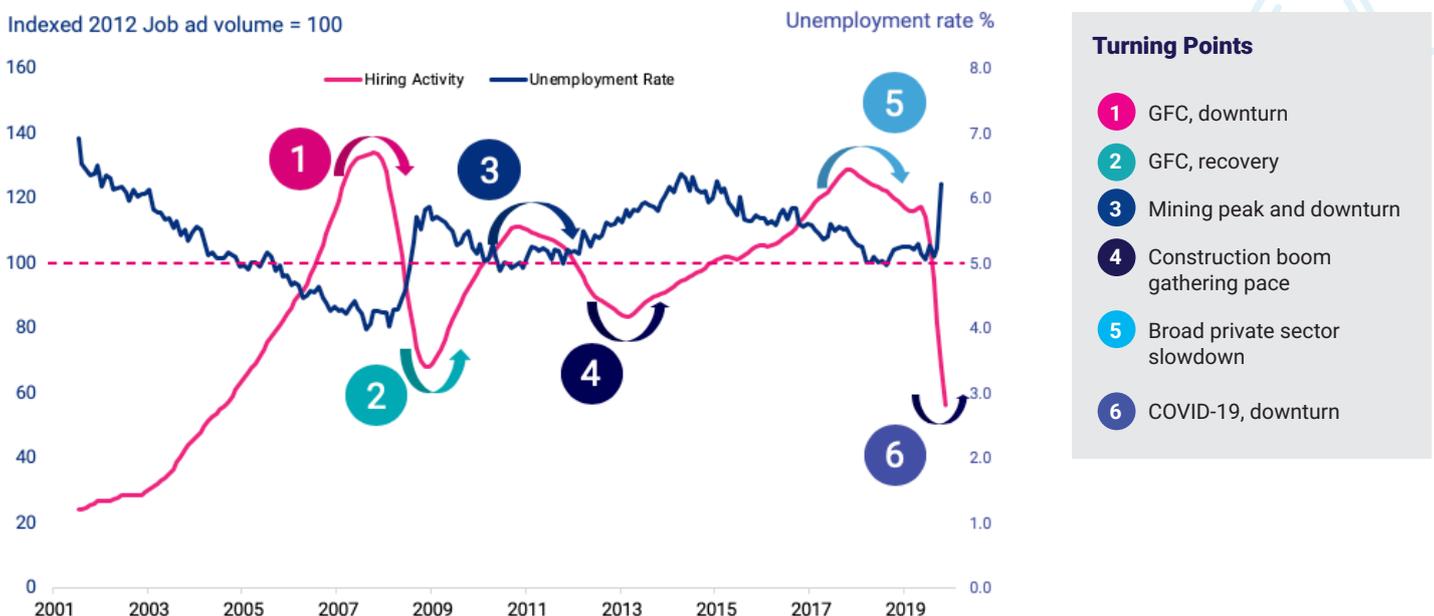
The Healthcare & Medical industry employs 14% of the working population – that's 1.7 million Australians – which means its job ad data can paint a telling picture of national workforce trends.

This report, created exclusively for those hiring in the Healthcare & Medical industry, offers a deeper look at trends shaping the healthcare labour market and forces that could impact recruitment strategies.

SEEK's National Healthcare Sales Manager, James Duncan, says SEEK has been collecting and observing data on the hiring activities of more than one million small, medium and large businesses for more than two decades.

FIGURE 1. SEEK'S MEASURE OF HIRING ACTIVITY IS A LEAD INDICATOR

OF MAJOR POINTS IN THE AUSTRALIAN UNEMPLOYMENT RATE



Source: ABS Quarterly Labour Force Survey – stock of total employed in Health Care and Social Assistance roles.

"We are lucky at SEEK to benefit from the largest set of employment data in ANZ, which enables us to observe the majority of hiring businesses and candidates out there. No other lead indicators have the track record of the SEEK Index when it comes to foreshadowing major shifts in the national unemployment figures," Duncan says.

"Having over 20 years of Australian employment data puts SEEK in a unique position to provide valuable insights to those who are hiring. Looking at Figure 1, we can see that coupling historical trends with real-time job market movements allows SEEK to make educated predictions on where the market is heading next."

"For example, among the data inputs we analyse are small business trends. When small businesses

are hiring, it's a sign business confidence is high. Bringing in someone new is a big investment for small businesses, so when we start to see this trend up, it helps us to gauge sentiment in the market."

This report breaks down the employment data specific to those working in the Healthcare & Medical industry (refer to Table 1), and looks at the trends across five key areas:

- Aged & Disability Support
- Nursing
- Allied Health
- Specialist Services
- Management

TABLE 1. SEEK HEALTHCARE PULSE REPORT BREAKDOWN OF HEALTHCARE & MEDICAL ROLES

SEEK classification	Role groups	SEEK subclassification	Size of sector*
Community Services & Development	Aged & Disability Support	Aged & Disability Support services	14%
	Allied Services	All healthcare services excluding nurses/doctors/dental professions. (Opticians, Natural Therapies, Physiotherapy, Speech Therapy)	22%
Healthcare & Medical	Specialist Services	Medical and dental professions (Dental, GPs, Medical Specialists, Pharmacy, Ambulance/Paramedic)	22%
	Nursing – all roles	Nursing (A&E, Aged Care, General Medical, Paediatric, Midwifery, High Acuity, Educators)	29%
	Management/Other	Management and Other Roles (Sales, Medical Administration)	13%

*Based on SEEK Job Ads



This report is designed to inform your people and talent strategies by providing insight into the candidate market. It allows you to identify emerging candidate trends across states and territories. The report also sheds light on the impact of the COVID-19 pandemic on the Healthcare & Medical industry. Finally, it offers a snapshot of the industry's outlook, and outlines the key tools and insights for you to make use of in the months ahead.

WHAT THE TRENDS REVEAL

There has been significant growth across most areas of healthcare over the past decade.

This growth has been strongest in roles in the Aged & Disability Support and Allied Services sectors, in response to the rollout of the NDIS. In 2019, these two job markets made up 76% of the year-on-year growth in the industry.

FIGURE 2. JOB AD GROWTH BY SECTOR

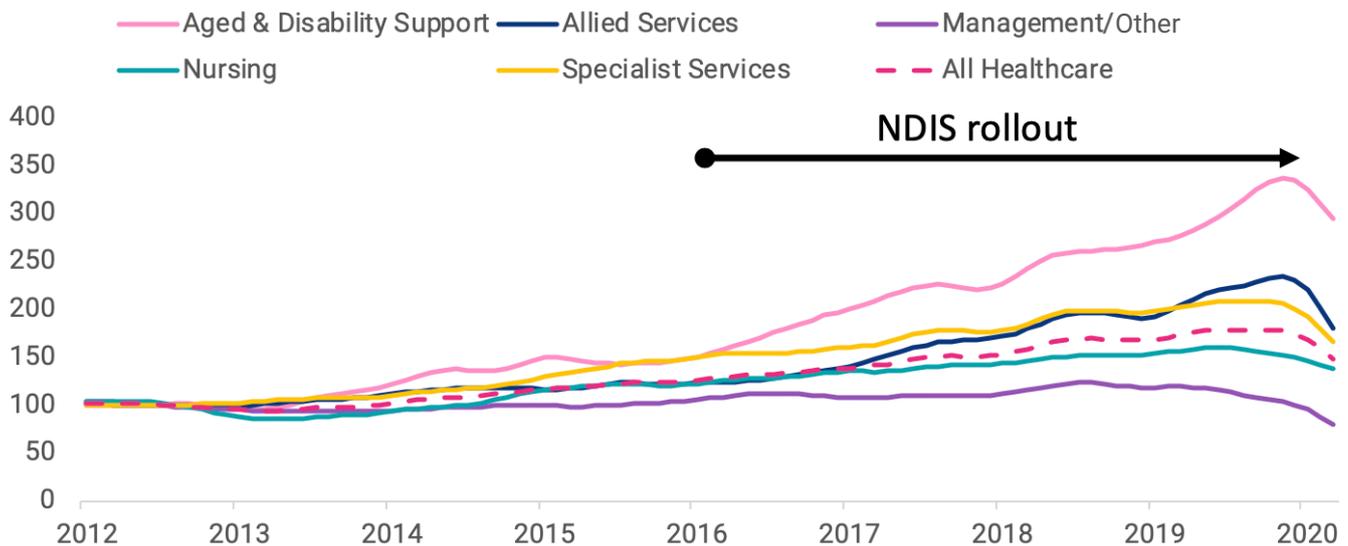


TABLE 2. GROWTH RATES BY SECTORS PRE/POST NDIS

	Aged & Disability Support	Allied Services	Management/Other	Nursing	Specialist Services
Pre NDIS	10%	5%	1%	5%	9%
Post NDIS	15%	14%	1%	5%	7%

Candidate supply challenges

Supply shortages persist across most Healthcare & Medical roles, particularly in regional and rural Australia, which relies significantly on candidates from other areas to fill roles, as outlined in Table 3.

Many organisations are facing candidate supply challenges, particularly in the Allied Health sector where job seeker numbers continue to decrease. However, there has been an increase in the number of candidates searching for positions in the Management and Aged & Disability Support sectors (refer to Figure 4).

Understanding candidate supply

Duncan says there is currently high mobility among candidates, both from within the Healthcare & Medical industry, as well as from candidates entering from other industries, such as Retail and Hospitality & Tourism.

“Candidates are willing to move interstate and into the regions, but there is also this sector mobility where people are transferring from other industries and moving into healthcare,” he says.

Cross-industry mobility is discussed in further detail on page 7 of this report.

What this mobility demonstrates is how important it can be to broaden your candidate search to areas where there is a greater supply of candidates, and to include messaging to attract them to relocate.

For example, the data reveals a notable oversupply of nurses, doctors and dentists in our cities but significant shortages in the regional and rural parts of Australia (refer to Figure 3). It’s clear that for the major cities, there is high demand and low supply of Aged Care workers, while Sydney, in particular, is also finding difficulty in attracting candidates to Managerial and Allied Services roles.

TABLE 3. SEEK APPLICATION DATA SHOWS REGIONAL AND RURAL AUSTRALIA RELY ON CANDIDATES EXTERNAL TO THE COMMUNITY TO FILL LOCAL ROLES

State	% of external applicants	
	Metro	Regional
ACT	36%	
NSW	15%	55%
NT	53%	83%
QLD	22%	48%
SA	17%	67%
TAS	49%	63%
VIC	17%	69%
WA	15%	67%

Source: SEEK

FIGURE 3. GEOGRAPHIC SUPPLY AND DEMAND OF CANDIDATES



Figure 3.1 Aged & Disability Support



Figure 3.4 Specialist Services

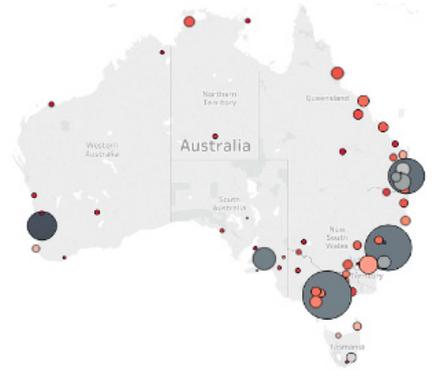


Figure 3.2 Allied Services

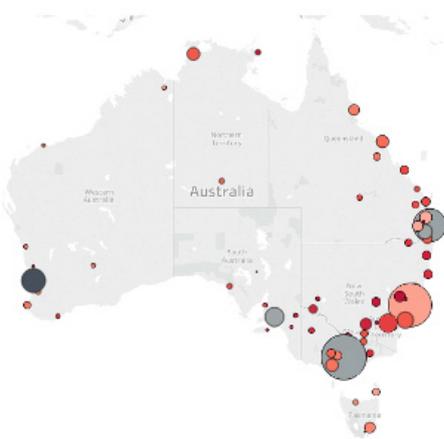


Figure 3.5 Nursing

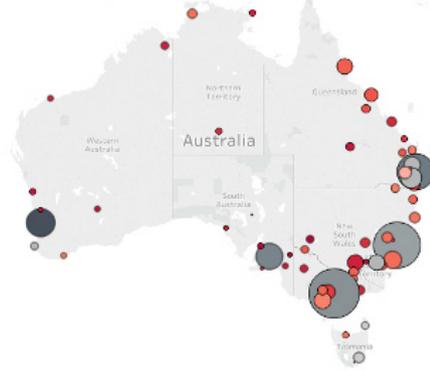
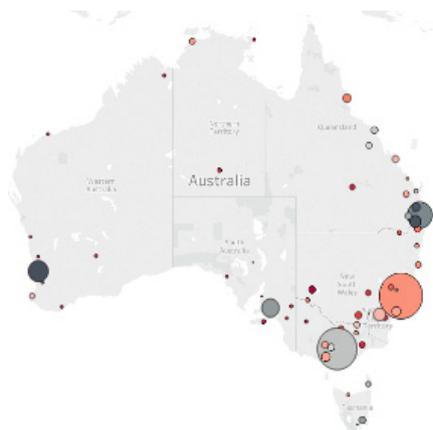


Figure 3.3 Management & Other



Duncan says SEEK’s Healthcare team can help clients understand and interpret candidate supply data so that they can adapt their strategies and messaging to ensure they’re attracting the right candidates for their roles.

“When our regional clients see there’s an oversupply of candidates in Sydney, Melbourne and Brisbane, and then place their job ads in those areas – selling the location and the role at the same time – they find the candidate applications flow in,” says Duncan.

“A great example we had was with a North Queensland health service. They were struggling to attract Mental Health Nurses and needed to adopt a new strategy. We worked with the client to identify that there was an oversupply of these candidates in both Melbourne and Sydney – and that some of these candidates may be open to relocating to sunny North Queensland.

“By adapting their job ad content to not only sell the role but also the location and lifestyle opportunities, then posting the job ad in these major cities, the client attracted a wider pool of interested and relevant candidates, leading to more applications and ultimately a placement”, explains Duncan.

THE COVID-19 EFFECT

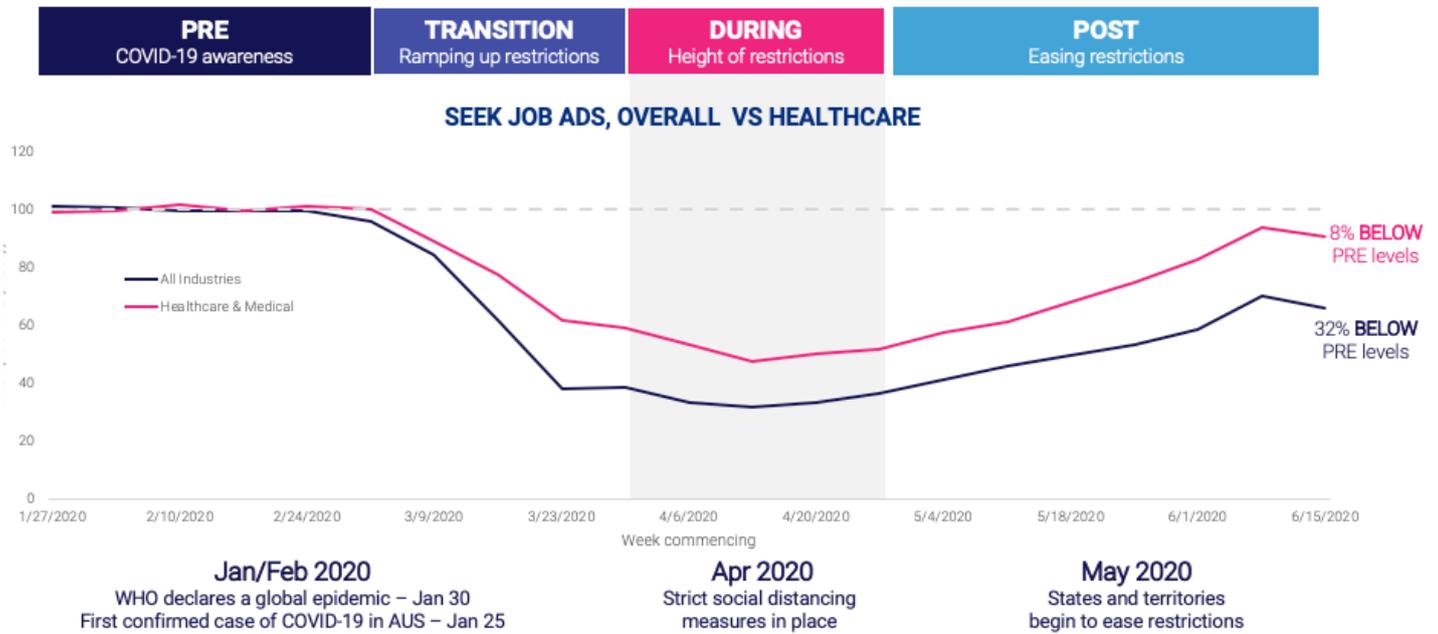
COVID-19 first hit Australia's shores in January 2020. By the end of February, the number of job vacancies had begun a steep decline as businesses braced for the potential impact.

The pandemic's effect on labour demand was felt widely, including through much of the Healthcare & Medical industry. However, the decline was neither as rapid nor as extreme in this industry compared to others.

While Healthcare & Medical job ad numbers dropped significantly across all states and territories, as demonstrated in Figure 5, the largest drops were in Victoria and South Australia – each of these states reported declines of 54% (refer to Figure 6). This downward trend was observed across all industries.

However, as illustrated in Figure 5, our recent data suggests the COVID-19 trough has bottomed out and, a long and slow road to recovery has begun. And as Figure 6 illustrates, the Healthcare & Medical industry has fared the best of any industry – job ads as of the end of June were sitting at 8% below their pre-COVID-19 levels, compared to the average drop across all industries of 32%.

FIGURE 5. THE IMPACT OF COVID-19 ON HEALTHCARE JOB ADS VS ALL INDUSTRIES

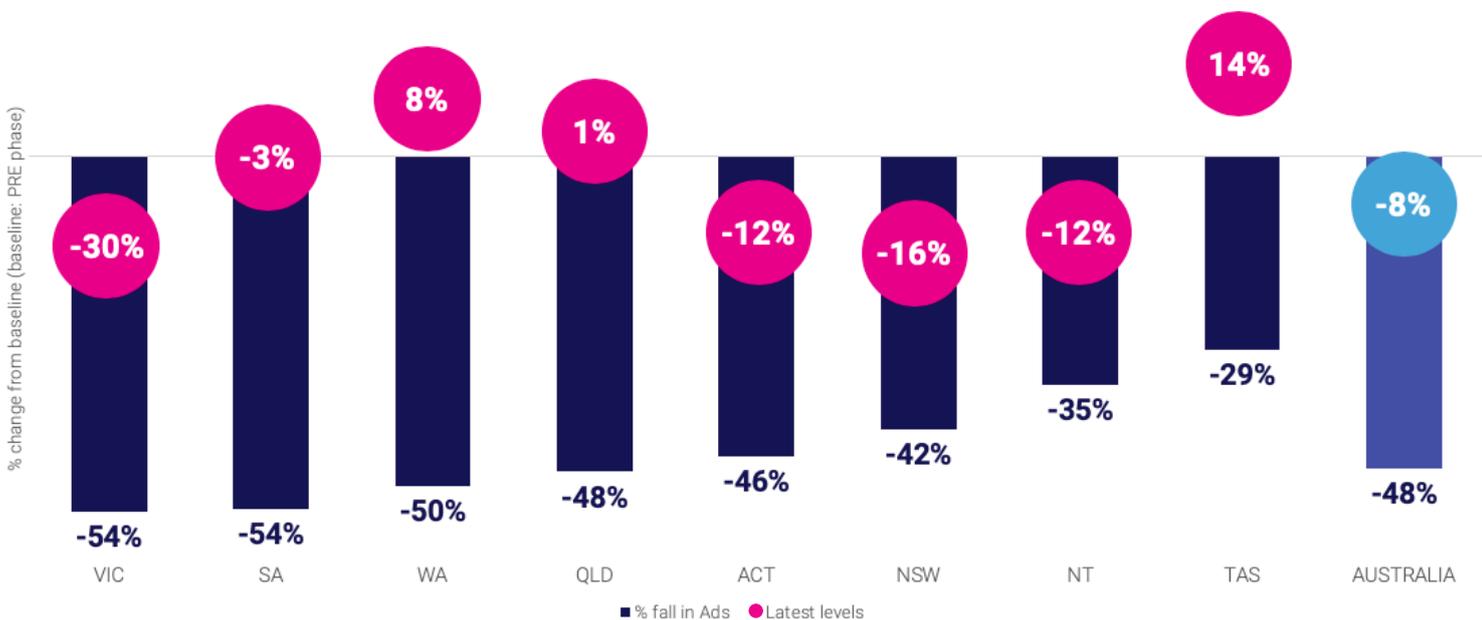


Source: SEEK, latest levels compares average of latest 2 weeks to PRE period

States at different stages of recovery

The decline was felt equally throughout the country, but the pace of recovery has differed as the states and territories each navigate when and how to ease restrictions.

FIGURE 6. HEALTHCARE JOB ADS BY STATE

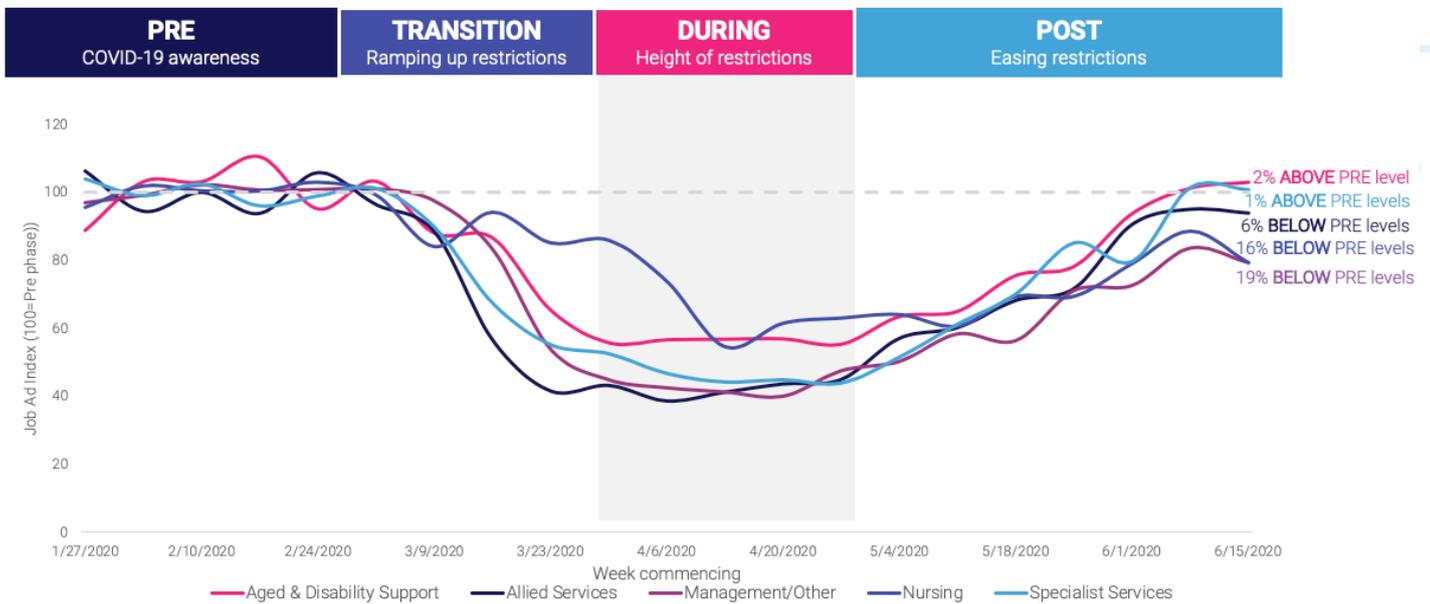


Source: SEEK, % fall in Job Ads: Job Ad levels in DURING vs PRE phase; latest levels: latest 2 weeks (08/06-21/06) vs PRE phase

The states that were first to loosen their lockdown restrictions – Western Australia, Queensland and South Australia – have reported the largest increases in job ad volumes over recent weeks. Western Australia is indicating an 8% higher demand for Healthcare & Medical jobs now than it was before the crisis. Queensland’s demand is up 1% and South Australia’s is now at just 3% less than its pre-COVID-19 level.

Victoria and New South Wales have been slowest to recover. NSW is still recording 16% fewer job ads while Victoria’s job volume is down 13%. Despite this, the industry’s recovery in these states is still well ahead of the rest of the economy with job ad numbers for all roles across all other industries still down by 41% (NSW) and 39% (Victoria) compared to what they were at the start of the pandemic.

FIGURE 7. JOB ADS BY SECTOR AND THE IMPACT OF COVID-19



Source: SEEK, latest levels: latest 2 weeks (08/06-21/06) vs PRE phase

How roles were impacted

When looking at the job ad data by role group (refer to Figure 7), frontline roles for the health crisis, such as Nurses, were among the last to be affected by COVID-19. Demand for Nurses dropped slightly in the early stages of the pandemic, but then went into a sharp decline around early to mid-April at the height of government restrictions.

However, as Figure 6 illustrates, the latest SEEK data shows all Healthcare & Medical role groups are now recovering well. Job vacancies for Aged & Disability Support workers, and Specialist roles, are already back at the levels they were in the early days of COVID-19 awareness. Allied Services are not far behind. Nursing and Managerial jobs are trailing the rest of the sector but still recording a steady increase in demand.

Duncan says, "In the early weeks of the outbreak, hospitals and aged care facilities sought to boost their nursing workforce in preparation for an unprecedented health impact. However, as the government sent the country into lockdown, emergency rooms became less busy and elective surgeries were stopped, leading to many contract and casual nurses no longer being needed."

There was also an increased availability of agency nurse workers during this time due to hospitals and aged care facilities reducing their agency budgets and/or mobilising their existing staff to cater for pockets of increased demand.

COVID-19 has also sparked an influx of new candidates into the Healthcare & Medical industry. Many have come across from the Hospitality & Tourism and Retail industries, which were hit hard by lockdown restrictions, and these candidates are bringing valuable soft skills to the market.



WHAT THE FUTURE HOLDS

Looking ahead, there are several key themes and insights for employers to keep front of mind, plus relevant tools and resources from SEEK that can provide support through the hiring process and beyond.

Job security in focus

Duncan believes there will be flow-on effects from COVID-19 that hirers need to keep in mind. He sees a decline in hirers, and candidates, wanting to fill casual or contract roles and instead an increased interest in part-time or full-time employment.

“For many people, COVID-19 highlighted the importance of job security. It’s likely this will become a higher priority for candidates in the wake of job cuts that particularly hurt contract and casual staff in the industry,” Duncan adds.

In addition, as organisations review their budgets post-COVID, they may no longer be as prepared to pay the higher rates associated with agency workers.

New candidates, fresh perspectives

The flow of job seekers crossing over from other industries has widened the talent pool for the Healthcare & Medical industry. Candidates who have never considered moving into the industry have now become available, bringing new skills and fresh perspectives to the market.

“I’ve had direct feedback from hirers that some of the people coming in from other industries are a breath of fresh air,” says Duncan. “They see things differently, are energetic and enthusiastic, and some hirers are using video or text in their job ad to specifically retarget those sorts of candidates.”

It’s also an opportunity to break down preconceived perceptions, particularly for roles in Aged & Disability Support that some job seekers may have resisted due to a poor public image of what the work entails.

Duncan says new candidates in the Aged & Disability Support sector have reported greater job satisfaction or different experiences than they'd been expecting. That makes this an optimum time to capitalise on positive messages and incorporate them into recruitment campaigns.

Providing pathways for growth

Career pathways can be a key driver for candidates, so ensuring your organisation offers avenues for growth and promotion can help you attract and retain quality employees.

Duncan says showing potential applicants career development opportunities early on can be an important factor in employee retention.

Candidate management matters

The pandemic has created an influx of candidates, particularly for public hospitals and aged care. Many are coming in from industries such as



SEEK Learning helps candidates identify the courses available to help them get into the career they desire. For example, those making a switch from Tourism to the Aged & Disability Support sector can be directed to relevant providers in their area.



Using **SEEK Career Advice**, candidates can find out what to expect from the role they are pursuing, including availability of jobs in the market, how many other applicants they're likely to be up against and the typical salary range.

Hospitality & Tourism and Retail, bringing valuable skills like customer service or first aid. The volume of applicants in some cases has been overwhelming.

Duncan says candidate management is now more important than ever. "You have got some potentially great candidates sitting there but you may not have roles for them at the moment, because the pandemic didn't eventuate the way it was expected, or because you have been able to mobilise your current workforce. But it's important to keep these candidates engaged," says Duncan.

Research conducted on behalf of SEEK found 94% of candidates want to know where they are in the application process, whether they are successful or not. Meanwhile, 66% said they'd have a negative view of the company if they never heard back. Of those that didn't hear back, 57% would never apply for a job with that company again.

Duncan says these are significant figures, not just for organisations as employers, but for their consumer brands.

One of the challenges hirers may face in this area is the inefficiency of the application review and credential verification process. This can lead to lengthy delays, which can potentially cost you a quality candidate if not managed carefully.

SEEK's credential verification platform, Certsy, enables candidates to authenticate their AHPRA details at the time of application, reducing shortlist preparation times for hirers and making it easier for them to identify the most relevant candidates for their roles.

Leveraging the right advice and insights

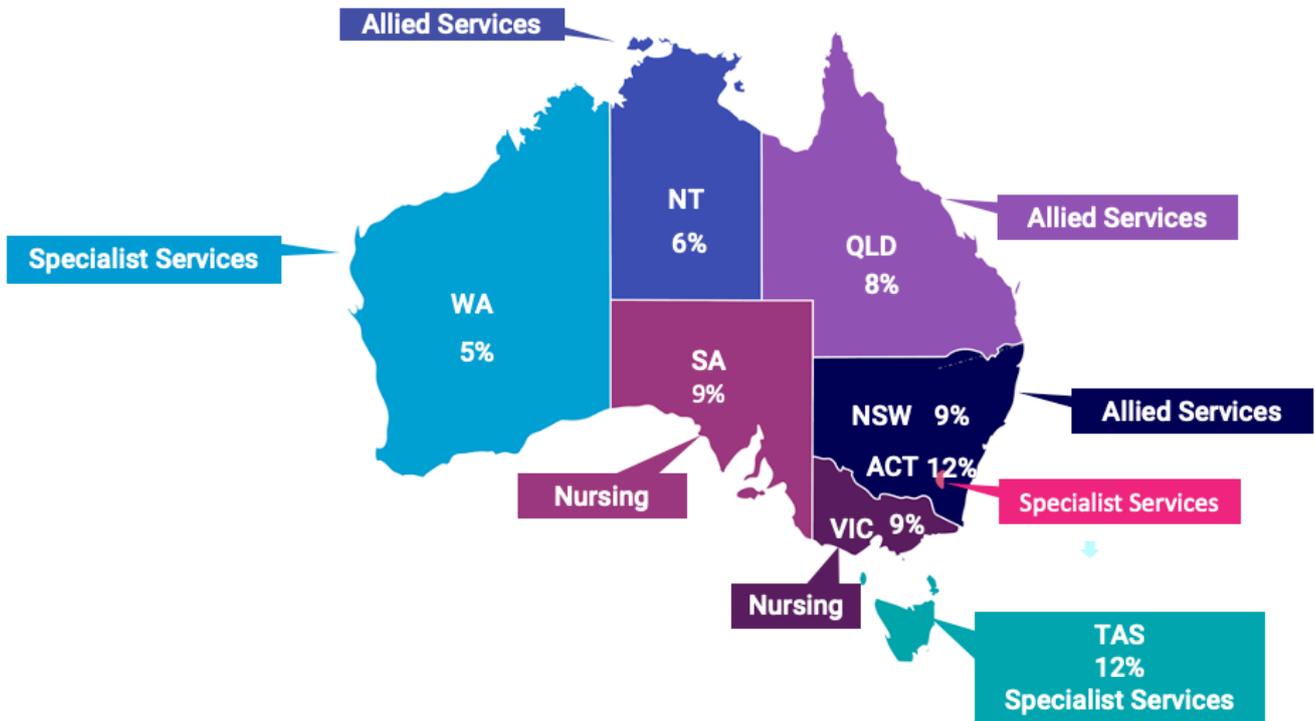
"At SEEK we have a dedicated Healthcare team who help our clients produce more appealing job ads," says Duncan. "By giving our clients access to data and research such as our comprehensive Laws of Attraction study, they can identify the information the candidates want to hear, and where to find them, and ultimately have a more informed talent strategy.

"We have more than 10 million SEEK Profiles and they all tell a unique story. When we group them together you can see similarities and patterns that can provide advantageous insights."

To learn more about how SEEK can help you with your healthcare hiring needs, get in touch with your SEEK Account Manager or email healthcaresales@seek.com.au

APPENDIX

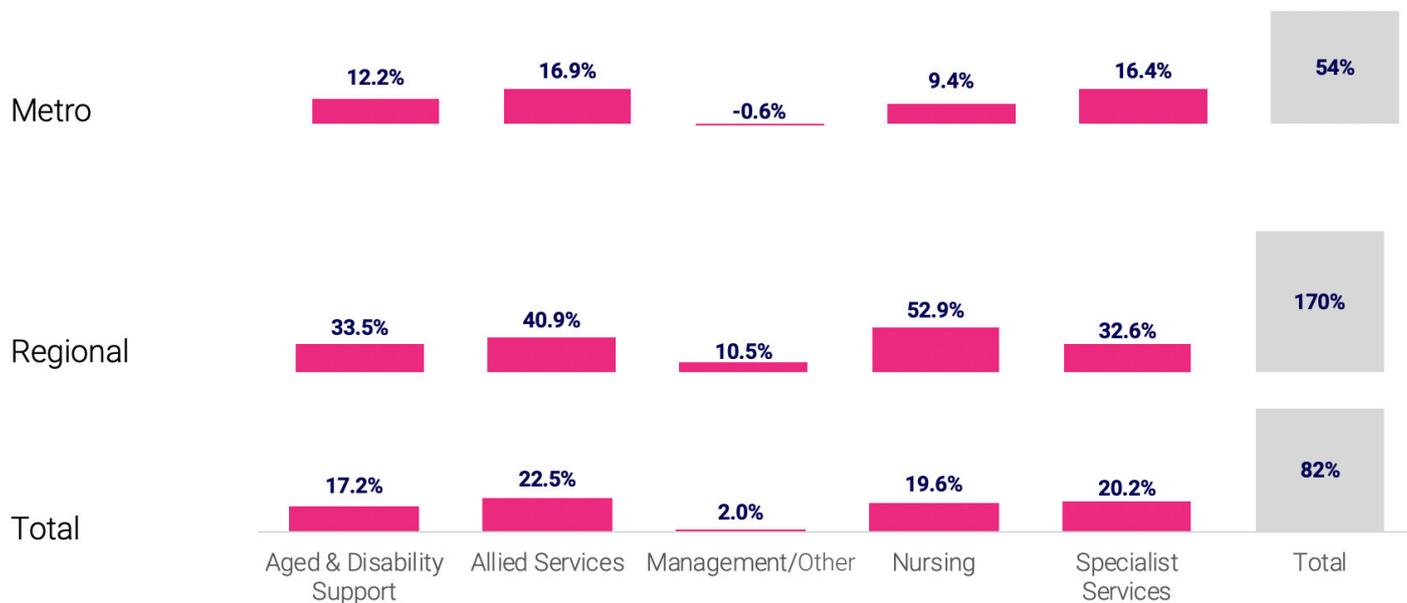
ANNUAL JOB AD GROWTH RATE BY STATE, AND BIGGEST SECTOR CONTRIBUTOR



ANNUAL JOB AD GROWTH BY SECTOR, BY STATE

State	Aged & Disability Support	Allied Health	Management	Nursing	Specialist services
ACT	11%	10%	3%	10%	15%
NSW	17%	11%	1%	7%	9%
NT	22%	9%	8%	-2%	10%
QLD	16%	14%	2%	4%	9%
SA	16%	5%	3%	10%	11%
TAS	30%	9%	0%	10%	15%
VIC	15%	11%	2%	7%	10%
WA	10%	7%	-4%	2%	6%
Australia	15%	11%	1%	6%	9%

ANNUAL GROWTH RATES BY SECTOR, BY METRO AND REGIONAL (2012 VS 2019)



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