

Information note – Update to payroll jobs and wages (week ending 5 September 2020)

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Key indicators

Since 14 March...	Employee jobs		Total wages	
	22 Aug	5 Sep	22 Aug	5 Sep
Australia	-4.1	-4.5	-5.1	-4.3
Male	-4.5	-5.0	-7.4	-6.8
Female	-4.1	-4.3	-2.1	-0.9
Accommodation and food services	-21.4	-21.9	-12.8	-13.8
Arts and recreation services	-13.7	-14.1	-7.5	-6.6
Under 20 years	-3.8	-2.7	22.1	24.0
20–29 years	-6.4	-6.7	-1.2	0.3
Victoria	-7.7	-8.3	-6.2	-5.4

Other relevant updates:

- The industries that comprised the 3 clusters remained broadly the same as at the time of the Annual Wage Review 2019–20 (week ending 30 May), with only Public administration and safety and Health care and social assistance showing movement and shifting to the lower cluster as reported in previous updates.
- Accommodation and food services and Arts and recreation services continue to remain the 2 most adversely affected industries.
- Employee jobs in Retail trade increased in the last fortnight but have remained broadly stable since peaking in early July despite a fall in jobs in Victoria.
- There continues to be a larger decline in jobs since 14 March in small and medium-sized businesses (around –7 per cent) than large businesses (–1.9 per cent).
- Since 14 March, payroll jobs fell 8.3 per cent in Victoria compared with a 3.1 per cent fall in the rest of Australia.

Key COVID-19 dates:

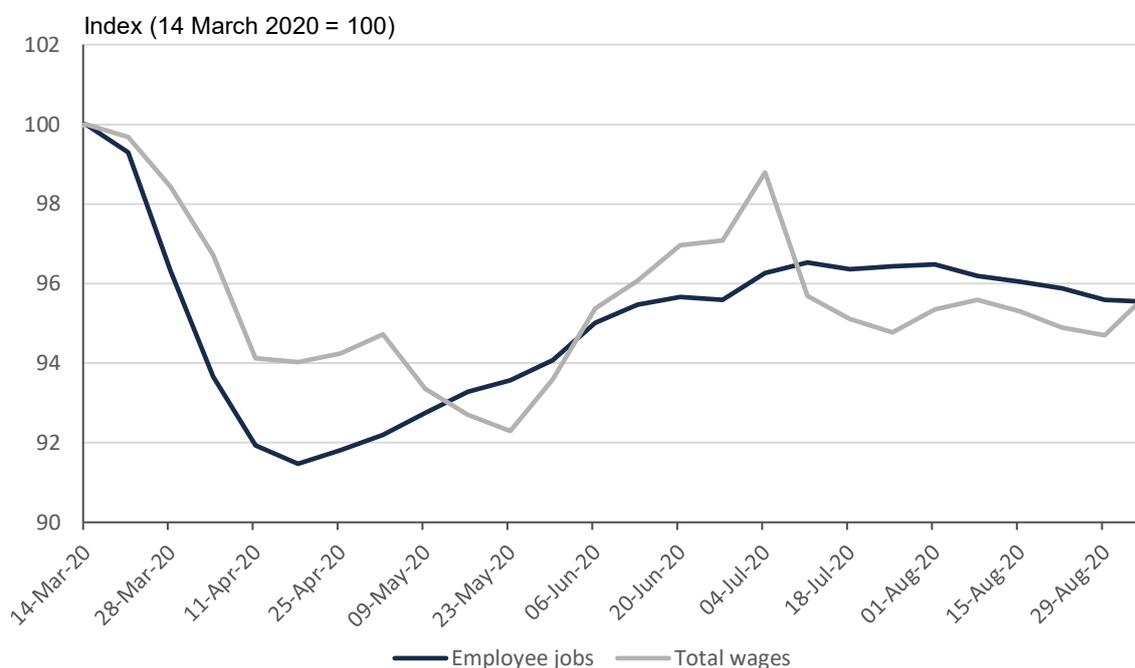
- Week ending 14 March: 100th recorded COVID-19 case in Australia (base for payroll data)
- 22 March: Prime Minister announces Stage 2 lock down changes
- 30 March: Prime Minister announces JobKeeper program
- Week ending 18 April: decline in employee jobs reaches its trough in the payroll data
- 8 May: Initial payroll deadline for the JobKeeper program
- Week ending 30 May: latest period in the Annual Wage Review 2019–20 decision
- 1 July: Stay at Home restrictions commence for selected Melbourne postcodes
- 8 July: Stay at Home restrictions commence for metropolitan Melbourne and Mitchell Shire
- 12 July: Early Childhood Education and Care Relief Package ceased
- 5 August: Stage 4 restrictions in metropolitan Melbourne and stage 3 restrictions in regional Victoria commence (curfew from 2 August)
- Week ending 5 September: latest period for payroll data

Total jobs and wages

The latest data cover a period in which COVID-19 restrictions continue to be eased across most states, except for Victoria where Stage 4 restrictions in metropolitan Melbourne and Stage 3 restrictions in regional Victoria has been implemented since 2 August.¹

Over the whole period from 14 March to 5 September, the number of employee jobs declined by 4.5 per cent and total wages declined by 4.3 per cent (Chart 1).

Chart 1: Change in employee jobs and total wages



Source: ABS, *Weekly Payroll Jobs and Wages in Australia, Week ending 5 September 2020*, Catalogue No. 6160.0.55.001.

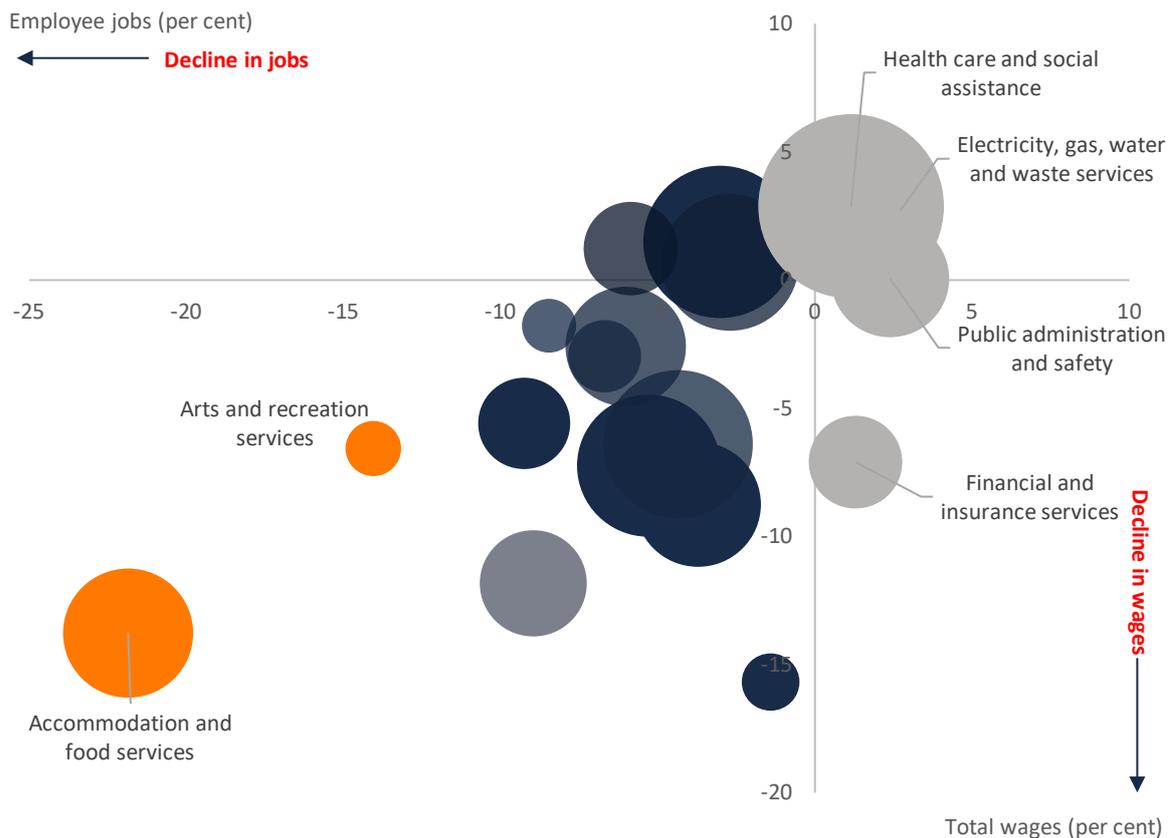
¹ See: [Information note – Government responses to COVID-19 pandemic](#), updated 18 September 2020.

Industry clusters

The industries that comprised the 3 clusters remained broadly the same as at the time of the Annual Wage Review 2019–20 (2019–20 Review). As reported in previous updates, the number of employee jobs in Public administration and safety and Health care and social assistance had increased since 14 March and are now part of the lower cluster (Chart 2).

Accommodation and food services and Arts and recreation services continue to remain the 2 most adversely affected industries according to the change in employee jobs between 14 March and 5 September 2020.

Chart 2: Change in employee jobs and total wages between 14 March and 5 September 2020

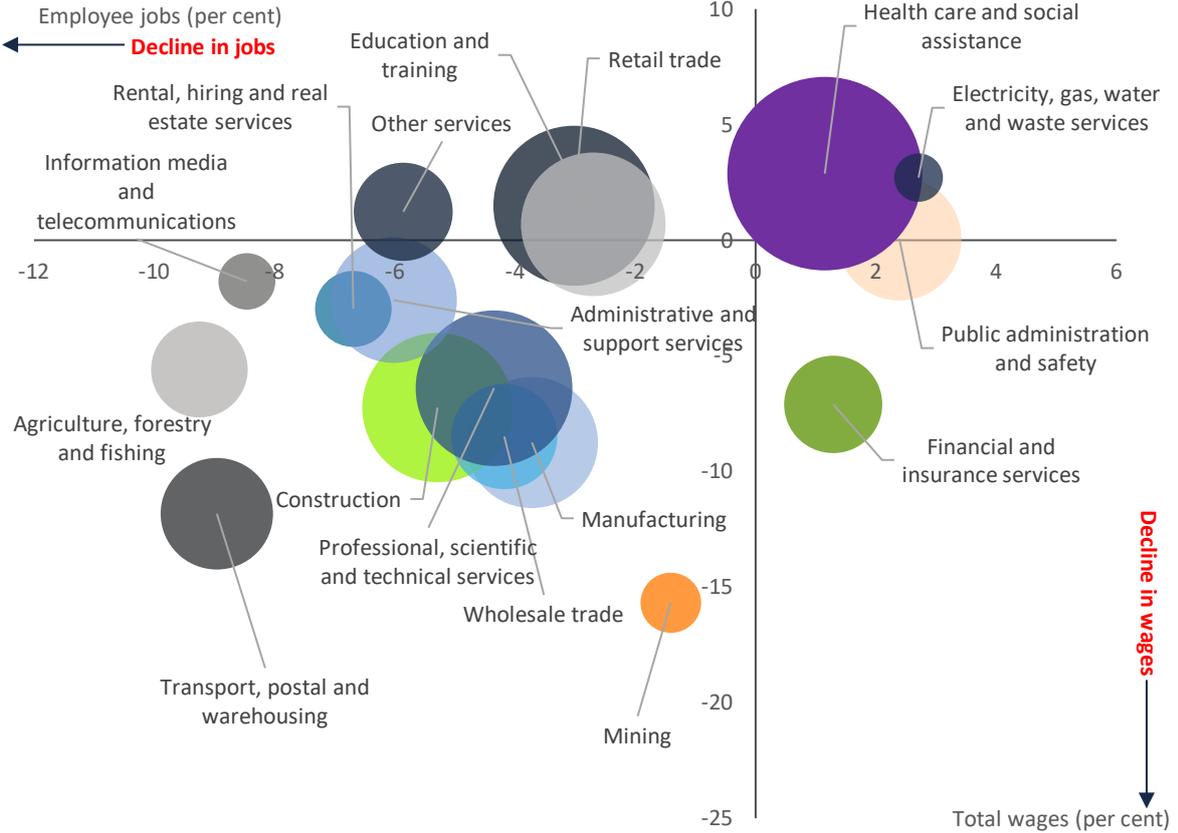


Note: Circle size reflects number of filled jobs (i.e. larger circles represent industries with higher number of filled jobs).

Source: ABS, *Weekly Payroll Jobs and Wages in Australia, Week ending 5 September 2020*, Catalogue No. 6160.0.55.001; ABS, *Labour Account Australia, June 2020*, Catalogue No. 6150.0.55.003.

Chart 3 presents the change in employee jobs and total wages for industries in the central and lower clusters.

Chart 3: Change in employee jobs and total wages between 14 March and 5 September 2020



Note: Circle size reflects number of filled jobs (i.e. larger circles represent industries with higher number of filled jobs). Chart excludes Accommodation and food services and Arts and recreation services.

Source: ABS, *Weekly Payroll Jobs and Wages in Australia, Week ending 5 September 2020*, Catalogue No. 6160.0.55.001; ABS, *Labour Account Australia, June 2020*, Catalogue No. 6150.0.55.003.

Table 1 compares the change in employee jobs and total wages between 14 March and 30 May 2020 (at the time of the 2019–20 Review) with the latest data to the week ending 5 September 2020 by industry cluster. Since the 2019–20 Review, the number of employee jobs and total wages has improved across most industries.

Since the previous update for the week ending 22 August 2020 (not shown in table), employee jobs improved the most in:

- Electricity, gas, water and waste services (1.6 percentage points);
 - Education and training (1.3 percentage points); and
 - Retail trade (0.8 percentage points)
- The increase in employee jobs in the past fortnight is not unusual and the number of jobs has remained broadly stable since peaking in early July despite a fall in Victoria. While the increase in this fortnight was the 3rd highest among industries, care should be exercised when focusing on the most recent movements in payroll jobs.

Total wages improved the most in:

- Retail trade (4.8 percentage points);
- Rental, hiring and real estate services (3.0 percentage points); and
- Electricity, gas, water and waste services (3.0 percentage points).

Table 1: Change in employee jobs and wages since 14 March

Industry	Employee jobs			Total wages		
	30 May* (%)	5 Sep (%)	Change (ppts)	30 May* (%)	5 Sep (%)	Change (ppts)
Upper cluster						
Accommodation and food services	-29.1	-21.9	7.2	-25.4	-13.8	11.7
Arts and recreation services	-26.3	-14.1	12.2	-14.0	-6.6	7.4
Central cluster						
Agriculture, forestry and fishing	-9.5	-9.3	0.3	-6.4	-5.6	0.8
Mining	-5.8	-1.4	4.4	-20.8	-15.7	5.1
Manufacturing	-4.0	-3.7	0.3	-11.4	-8.8	2.7
Construction	-5.8	-5.3	0.5	-7.8	-7.2	0.5
Wholesale trade	-4.1	-4.2	0.0	-13.5	-8.5	5.0
Retail trade	-6.3	-3.0	3.3	-4.3	1.5	5.8
Transport, postal and warehousing	-4.8	-9.0	-4.1	-9.5	-11.8	-2.4
Information media and telecommunications	-10.5	-8.5	2.0	-12.0	-1.8	10.2
Rental, hiring and real estate services	-10.1	-6.7	3.4	-13.7	-3.0	10.7
Professional, scientific and technical services	-4.4	-4.3	0.0	-8.4	-6.4	2.0
Administrative and support services	-10.1	-6.0	4.1	-8.1	-2.6	5.5
Education and training	-4.7	-2.7	2.0	0.7	0.7	0.0
Other services	-9.7	-5.9	3.8	-4.0	1.2	5.2
Lower cluster						
Health care and social assistance	-4.7	1.2	5.8	-3.4	2.9	6.2
Public administration and safety	-4.3	2.4	6.7	-6.3	0.1	6.3
Electricity, gas, water and waste services	0.4	2.7	2.3	-3.0	2.7	5.7
Financial and insurance services	0.5	1.3	0.8	-8.1	-7.1	1.0

Note: * At the time of the 2019–20 Review.

Source: ABS, *Weekly Payroll Jobs and Wages in Australia, Week ending 5 September 2020*, Catalogue No. 6160.0.55.001; ABS, *Labour Account Australia, March 2020*, Catalogue No. 6150.0.55.003.

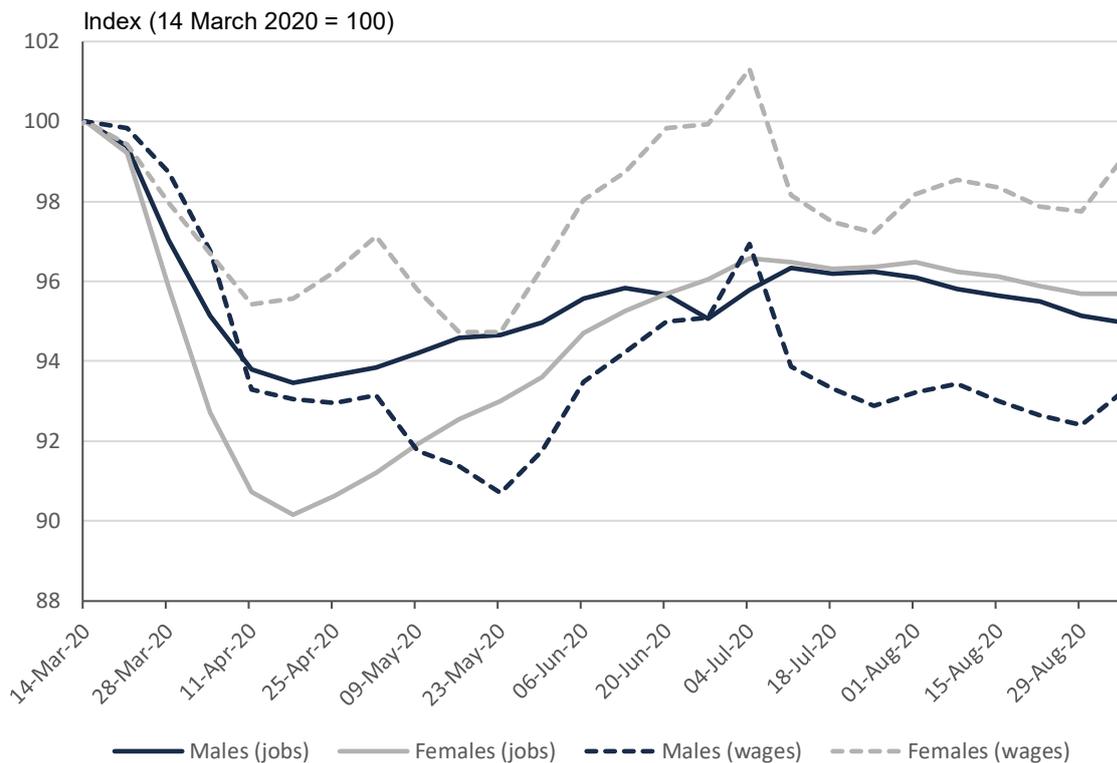
Sex

The decline in employee jobs troughed at around the week ending 18 April, at 6.5 per cent lower for males and 9.8 per cent lower for females, compared to 14 March (Chart 4). The number of employee jobs have since recovered, particularly for females, with job losses higher among males (−5.0 per cent) than females (−4.3 per cent) between 14 March and 5 September.

Following an initial decline during April and again to late May, total wages rebounded to early July, particularly for females. However, total wages have since fallen, particularly for males.

Between 14 March and 5 September, the decline in total wages for males (−6.8 per cent) was significantly greater than for females (−0.9 per cent).

Chart 4: Change in employee jobs and total wages, by sex



Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 5 September 2020, Catalogue No. 6160.0.55.001.

Age groups

Table 2 presents the change in employee jobs and total wages by age group. Between 14 March and 5 September, the age groups most impacted by the decline in jobs were those aged 70+ years (−11.1 per cent) and 20–29 years (−6.7 per cent). There was considerable improvement in employee jobs for those aged under 20 years between late May and late August.

Between 14 March and 5 September, total wages declined across most age groups except for those aged under 20 years (24.0 per cent) and 20–29 years (0.3 per cent). Since 30 May, there was improvement in total wages across each age group except for the older age groups—those aged 60–69 years and 70+ years.

Table 2: Change in payroll jobs and wages since 14 March 2020, select dates, by age group

Age group	Employee jobs			Total wages		
	14 March to 18 April (%)	14 March to 30 May (%)	14 March to 5 Sep (%)	14 March to 18 April (%)	14 March to 30 May (%)	14 March to 5 Sep (%)
Under 20 years	-22.9	-14.3	-2.7	1.8	7.7	24.0
20-29 years	-14.1	-10.4	-6.7	-7.4	-5.4	0.3
30-39 years	-6.5	-4.7	-3.4	-5.9	-6.7	-3.6
40-49 years	-5.2	-3.3	-2.5	-6.5	-8.1	-5.7
50-59 years	-5.0	-3.1	-2.6	-6.0	-7.1	-6.0
60-69 years	-7.0	-4.6	-5.8	-5.8	-5.8	-7.5
70+ years	-12.6	-7.5	-11.1	-4.5	-2.2	-7.7
Total	-8.5	-5.9	-4.5	-6.0	-6.4	-4.3

Source: ABS, *Weekly Payroll Jobs and Wages in Australia, Week ending 5 September 2020*, Catalogue No. 6160.0.55.001.

States and territories

Table 3 presents the changes in payroll jobs and wages between 14 March and 5 September across the states and territories. Victoria reported the largest decline in employee jobs over the period (-8.3 per cent), followed by the Australian Capital Territory (-4.5 per cent) and Tasmania (-4.3 per cent). Since 20 June, when restrictions were re-implemented in Victoria, total jobs declined in Victoria (-3.6 per cent) while jobs growth was positive across all other areas. The ABS noted that:

‘Over the month to 5 September, payroll jobs fell by 2.1 per cent in Victoria and by 0.2 per cent for the rest of Australia.

...

Payroll jobs remain around 4.5 per cent lower than mid-March – 8.3 per cent lower in Victoria and 3.1 per cent lower in the rest of Australia.²

Total wages have fallen the most in Victoria (-5.4 per cent) and New South Wales (-4.9 per cent) over the period from 14 March to 5 September. Since 20 June, total wages have declined across most states and territories, with the largest decline again in Victoria (-3.6 per cent).

² ABS, *Weekly Payroll Jobs and Wages in Australia, Week ending 5 September 2020*, Catalogue No. 6160.0.55.001, *Media Release*.

Table 3: Change in employee jobs and total wages, by state/territory

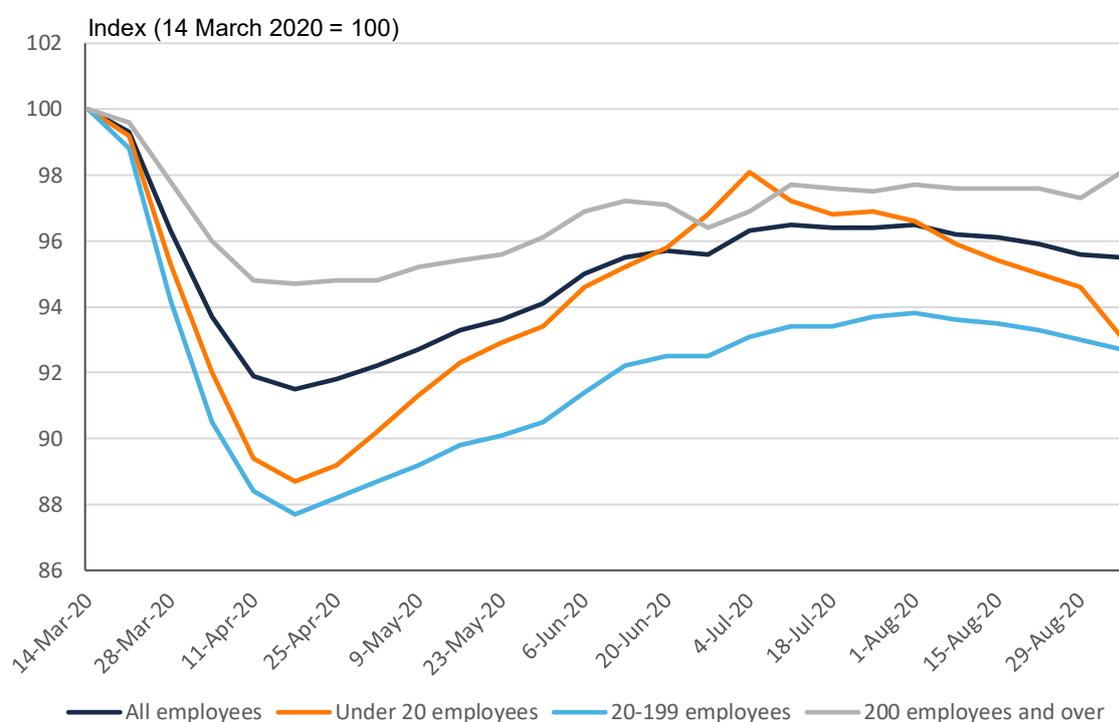
	14 March to 5 September		20 June to 5 September	
	Jobs (%)	Wages (%)	Jobs (%)	Wages (%)
New South Wales	-3.7	-4.9	0.4	-2.0
Victoria	-8.3	-5.4	-3.6	-3.6
Queensland	-3.2	-2.7	1.2	0.0
South Australia	-2.7	-1.0	2.5	1.5
Western Australia	-0.9	-4.3	2.3	2.6
Tasmania	-4.3	-4.5	1.6	-1.2
Northern Territory	-2.0	-1.0	0.7	1.8
Australian Capital Territory	-4.5	-2.8	0.3	-1.1
Total	-4.5	-4.3	-0.1	-1.3

Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 5 September 2020, Catalogue No. 6160.0.55.001.

Employment size

Employee jobs initially declined across all employment sizes to mid-late April before recovering to early July (Chart 5). Since then, the decline has been most evident in small businesses (under 20 employees). Between 14 March and 5 September, jobs declined the most in medium-sized businesses (20–199 employees) (-7.3 per cent) and small businesses (-6.9 per cent). Over the same period, employee jobs in large businesses (over 200 employees) fell by just 1.9 per cent.

Chart 5: Change in employee jobs, by employment size



Note: Excludes a small number of businesses where employment size was unable to be sourced from the ABS Business Register.

Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 5 September 2020, Catalogue No. 6160.0.55.001.

The decline in jobs was largest in Victoria across all business sizes (Table 4). Since 22 August, employee jobs in large businesses has increased in all jurisdictions with the exception of the Northern Territory, while it has continued to decline among small businesses.

Table 4: Change in employee jobs, by employment size

	Change between 14 March and 5 September (%)	Change between 22 August and 5 September (%)
Small (under 20 employees)		
Australia	-6.9	-1.9
Victoria	-11.9	-2.7
Medium (20-199 employees)		
Australia	-7.3	-0.6
Victoria	-13.0	-1.3
Large (over 200 employees)		
Australia	-1.9	0.5
Victoria	-4.1	0.5

Note: Excludes a small number of businesses where employment size was unable to be sourced from the ABS Business Register. Care should be exercised when focusing on the most recent movements in payroll jobs.

Source: ABS, *Weekly Payroll Jobs and Wages in Australia, Week ending 5 September 2020*, Catalogue No. 6160.0.55.001.