

# Information note – Update to payroll jobs and wages (week ending 14 November 2020)

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## Key indicators

Since 14 March...	Employee jobs		Total wages	
	31 Oct	14 Nov	31 Oct	14 Nov
Australia	-3.0	-2.9	-4.7	-3.9
Male	-4.3	-4.4	-6.6	-6.0
Female	-3.1	-3.1	-2.6	-1.7
Accommodation and food services	-15.1	-14.4	-14.2	-13.2
Arts and recreation services	-11.3	-10.6	-10.6	-9.3
Under 20 years	11.3	16.5	33.6	41.6
20–29 years	-4.0	-3.6	1.3	3.1
Victoria	-5.8	-5.4	-4.9	-3.3

## Other relevant updates

- The industries that comprised the 3 clusters have changed slightly from the time of the Annual Wage Review 2019–20 (week ending 30 May).
  - Retail trade has also now shifted from the *central* cluster to the *lower* cluster. **Public administration and safety** and **Health care and social assistance** had already shifted from the *central* cluster to the *lower* cluster.
  - **Electricity, gas, water and waste services** has shifted from the *lower* to the *central* cluster.
  - **Information media and telecommunications** has shifted from the *central* cluster to the *upper* cluster.
- There continues to be a larger decline in jobs since 14 March in small (–6.0 per cent) and medium-sized businesses (–5.0 per cent) than large businesses (–0.3 per cent).
- Since mid-March, payroll jobs fell by 5.4 per cent in Victoria and by only 2.0 per cent in the rest of Australia, however jobs continue to recover in Victoria.

## Key COVID-19 dates

- *Week ending 14 March: 100<sup>th</sup> 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)
- 14 September: metropolitan Melbourne moved to the First Step of the roadmap to reopening.
- 17 September: regional Victoria progressed to the Third Step of the roadmap to reopening.
- 28 September: metropolitan Melbourne moved to the Second Step of the roadmap to reopening, including increasing workforce capacity for some industries. JobKeeper extension 1 (modified eligibility test) commences. This lowers the rate from \$1500 to \$750–\$1200 depending on the number of hours an eligible employee works.
- 19 October: metropolitan Melbourne moved to an amended Second Step of the roadmap to reopening, and an amended Third Step for regional Victoria.
- 28 October: metropolitan Melbourne moved to the Third Step of the roadmap to reopening.
- *Week ending 14 November: latest period for payroll data*

## Total jobs and wages

Over the whole period from 14 March to 14 November, the number of employee jobs declined by 2.9 per cent and total wages declined by 3.9 per cent (Chart 1).

By mid-July, as restrictions had eased in most states and territories, almost two-thirds of the jobs lost by mid-April were recovered. This number has remained relatively stable to mid-November. Total wages have varied over the period, with the most recent decline coinciding with a reduction in the JobKeeper payment in late September.<sup>1</sup>

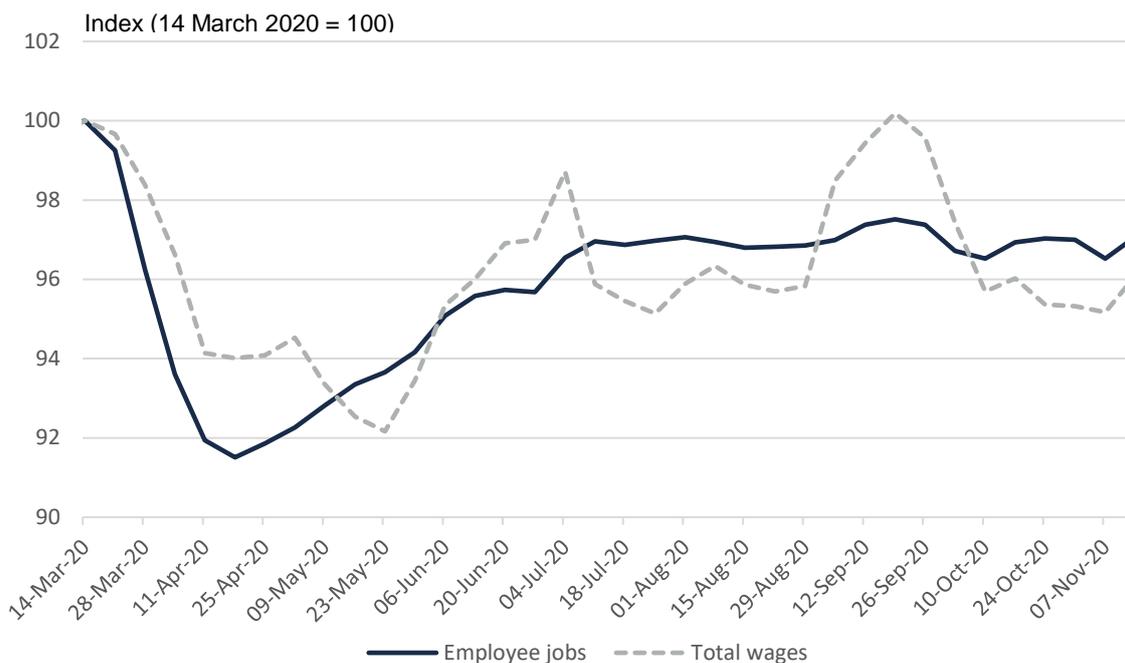
Data from the latest fortnight follows the removal of restrictions on leaving the home in Victoria.<sup>2</sup>

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<sup>1</sup> See: [Information note – Government responses to COVID-19 pandemic](#), updated 23 November 2020.

<sup>2</sup> The weekly change estimates for the most recent weeks of data contain a higher degree of reporting variability and imputation. The ABS aims to release data as close as possible to the period covered. The ABS recommends exercising caution when focusing on change in the most recent weeks, as these estimates are subject to greater levels of revision in subsequent releases as more complete and newly available data are included over time. See the following link for more information on this issue: <https://www.abs.gov.au/methodologies/weekly-payroll-jobs-and-wages-australia-methodology/week-ending-31-october-2020#data-limitations-and-revisions>.

**Chart 1: Change in employee jobs and total wages**



Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 14 November 2020.

## Industry clusters

The industries that comprised the 3 clusters have changed slightly from 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 these industries are now part of the lower cluster (Chart 2).

In this update, Information media and telecommunications has shifted to the upper cluster following a decline in the number of jobs between late September and early November. Since 14 March, the number of jobs has fallen by 12.6 per cent, the second largest decline across all industries. Within this industry, declines since late September were recorded in its largest subdivision, Telecommunication services (–9.2 per cent), as well as in relatively small subdivisions Internet publishing and broadcasting (–17.7 per cent) and Motion picture and sound recording activities (–10.5 per cent). Award reliance is relatively low in the industry (7.1 per cent), with only 3 industries having a lower proportion of non-managerial award-reliant employees.<sup>3</sup>

Accommodation and food services (–14.4 per cent) and Arts and recreation services (–10.6 per cent) remain in the upper cluster.

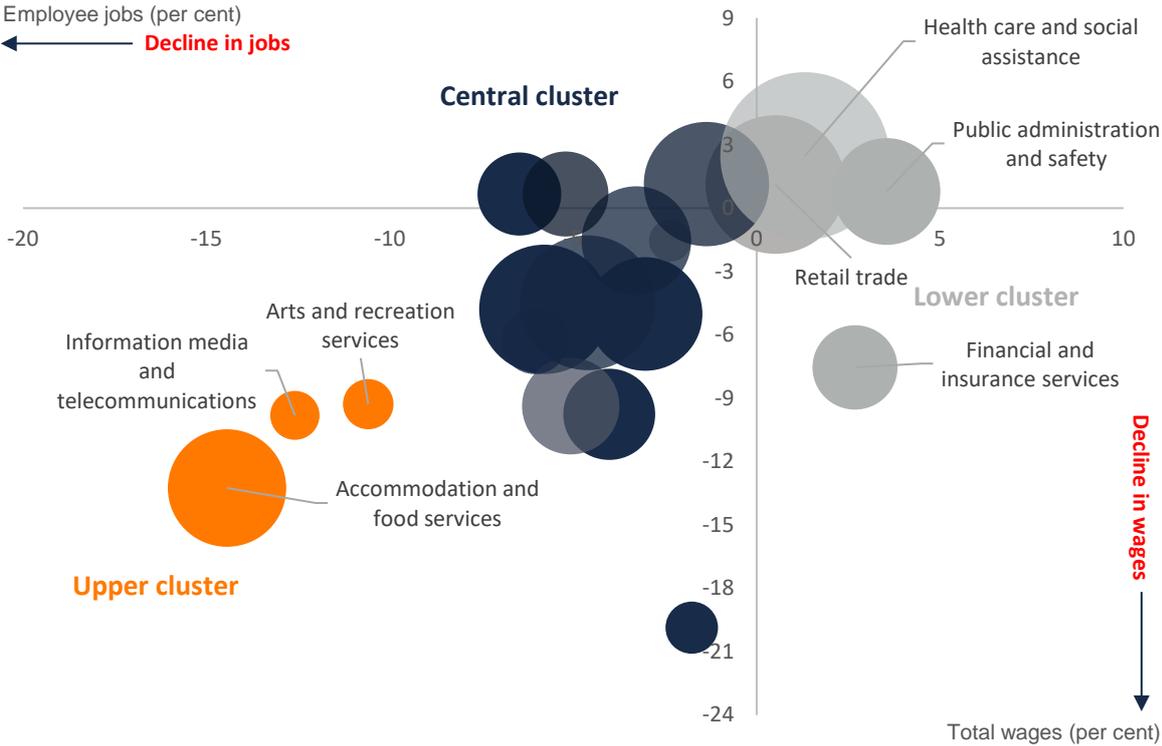
Retail trade has also shifted, from the central cluster to the lower cluster, following a rise in the number of jobs in the fortnight to 14 November. Between 31 October and 14 November, employee jobs in Retail trade increased by 1.8 per cent, with growth in total wages of 3.2 per cent.

The ABS noted that the end of the calendar year is a period with a high degree of seasonal increases in employment which should be considered when interpreting changes to the payroll data.<sup>4</sup>

<sup>3</sup> Fair Work Commission (2020), *Statistical report—Annual Wage Review 2019–20*, p. 64, Table 7.1.

<sup>4</sup> ABS (2020), *Payroll jobs continue to rise in Victoria*, Media release, 1 November

**Chart 2: Change in employee jobs and total wages between 14 March and 14 November 2020**

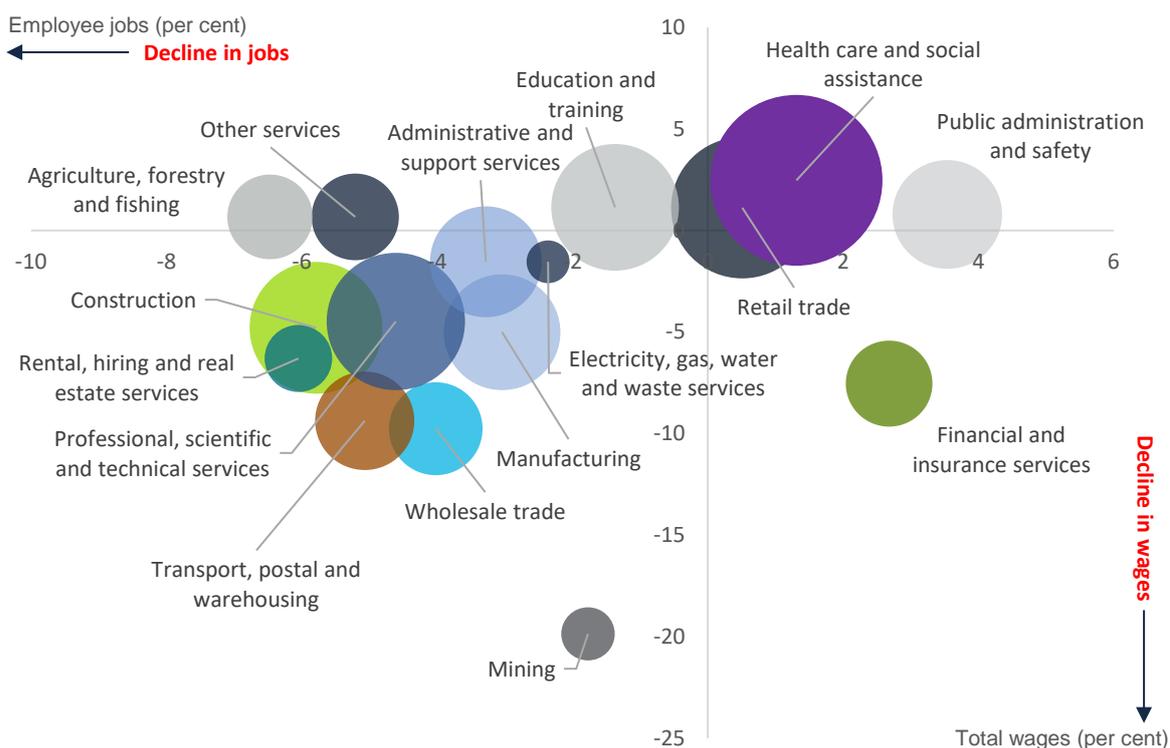


Note: Circle size reflects number of filled jobs (i.e. larger circles represent industries with higher number of filled jobs).

Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 14 November 2020; ABS, *Labour Account Australia*, June 2020.

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 14 November 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 14 November 2020; ABS, *Labour Account Australia*, June 2020.

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 14 November 2020 by industry cluster. Since the 2019–20 Review, the number of employee jobs and total wages has improved across most industries.

However, over the last fortnight (between 31 October and 14 November 2020, which is not shown in the table), changes to employee jobs were mixed, with increases in 10 out of 19 industries. The largest increases were in:

- Retail trade (1.7 percentage points); and
- Education and training (1.3 percentage points).

The largest declines in employee jobs were in:

- Agriculture, forestry and fishing (–2.7 percentage points); and
- Other services (–1.8 percentage points).

Total wages increased in 12 out of 19 industries with the most notable in:

- Manufacturing (4.3 percentage points); and
- Retail trade (3.1 percentage points).

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

Industry	Employee jobs			Total wages		
	30 May* (%)	14 Nov (%)	Change (ppts)	30 May* (%)	14 Nov (%)	Change (ppts)
<b>Upper cluster</b>						
Accommodation and food services	-29.1	-14.4	14.7	-25.4	-13.2	12.2
Information media and telecommunications	-10.5	-12.6	-2.1	-12.0	-9.8	2.2
Arts and recreation services	-26.3	-10.6	15.7	-14.0	-9.3	4.7
<b>Central cluster</b>						
Agriculture, forestry and fishing	-9.5	-6.5	3.1	-6.4	0.7	7.1
Mining	-5.8	-1.8	4.0	-20.8	-19.9	0.9
Manufacturing	-4.0	-3.0	0.9	-11.4	-5.0	6.4
Construction	-5.8	-5.8	0.0	-7.8	-4.8	3.0
Wholesale trade	-4.1	-4.0	0.1	-13.5	-9.8	3.8
Transport, postal and warehousing	-4.8	-5.1	-0.2	-9.5	-9.4	0.1
Rental, hiring and real estate services	-10.1	-6.0	4.0	-13.7	-6.3	7.4
Professional, scientific and technical services	-4.4	-4.6	-0.2	-8.4	-4.5	4.0
Administrative and support services	-10.1	-3.3	6.8	-8.1	-1.5	6.5
Education and training	-4.7	-1.4	3.3	0.7	1.1	0.4
Other services	-9.7	-5.2	4.5	-4.0	0.7	4.6
Electricity, gas, water and waste services	0.4	-2.4	-2.8	-3.0	-1.5	1.4
<b>Lower cluster</b>						
Health care and social assistance	-4.7	1.3	6.0	-3.4	2.5	5.8
Retail trade	-6.3	0.5	6.8	-4.3	1.1	5.4
Public administration and safety	-4.3	3.5	7.9	-6.3	0.8	7.0
Financial and insurance services	0.5	2.7	2.2	-8.1	-7.5	0.5

Note: Total wages for Mining may include annual bonuses in March and September. \*At the time of the 2019–20 Review.

Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 14 November 2020.

## Sex

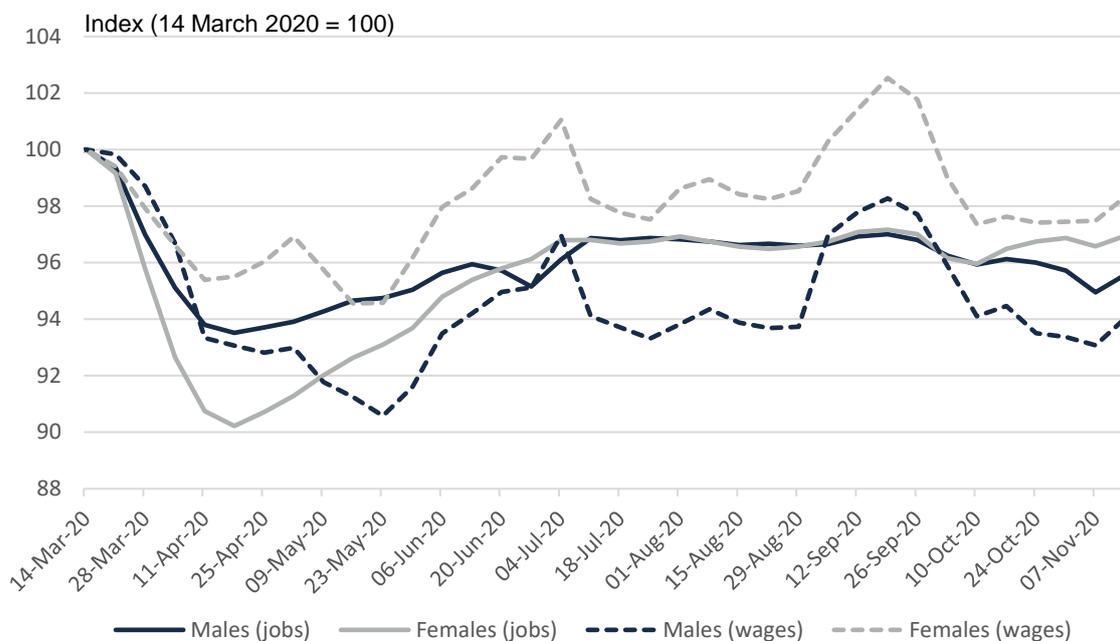
The decline in employee jobs troughed at around the week ending 18 April, at 6.5 per cent lower for males and 9.8 per cent lower for females, compared to 14 March (Chart 4).

The number of employee jobs then recovered for both genders to be only 3–4 per cent lower between July and September. However, there was a slight fall in jobs at the beginning of October, and since then jobs for females have recovered more so than for males. Over the period from 14 March to 14 November, job losses were higher among males (-4.4 per cent) than females (-3.1 per cent).

Total wages declined more for males than females between 14 March and 23 May, where wages reached its trough. Since then, total wages for females have more than males, however, the trends have been similar. The decline in wages between late-September and early October likely reflects the decline in the JobKeeper rate.

Between 14 March and 14 November, total wages for males (-6.0 per cent) declined more than for females (-1.7 per cent).

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



Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 14 November 2020.

## Age groups

Table 2 presents the change in employee jobs and total wages by age group. Between 14 March and 14 November, the age groups most impacted by the decline in jobs were those aged 70+ years (-13.1 per cent), 60–69 years (-6.9 per cent), and 20–29 years (-3.6 per cent).

There was considerable improvement in employee jobs for those aged under 20 years between late May and mid-November, while employee jobs fell significantly for those aged 70+ years over this same period.

Between 14 March and 14 November, total wages declined across all age groups except for those aged under 20 years (41.6 per cent) and 20–29 years (3.1 per cent).

However, since 30 May, there has been an improvement in total wages across each age group except among 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 14 Nov (%)	14 March to 18 April (%)	14 March to 30 May (%)	14 March to 14 Nov (%)
Under 20 years	-22.8	-14.1	16.5	2.9	8.9	41.6
20–29 years	-14.3	-10.5	-3.6	-7.4	-5.3	3.1
30–39 years	-6.6	-4.7	-3.0	-6.0	-6.9	-3.1
40–49 years	-5.1	-3.3	-2.1	-6.5	-8.3	-5.6
50–59 years	-4.9	-3.0	-2.6	-6.1	-7.4	-6.4
60–69 years	-6.8	-4.5	-6.9	-5.8	-6.0	-9.4
70+ years	-12.6	-7.4	-13.1	-4.5	-2.0	-13.6
<b>Total</b>	<b>-8.5</b>	<b>-5.8</b>	<b>-2.9</b>	<b>-6.0</b>	<b>-6.5</b>	<b>-3.9</b>

Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 14 November 2020.

## States and territories

Table 3 presents the changes in employee jobs and wages between 14 March and 14 November across the states and territories. Victoria reported the largest decline in employee jobs over the period (-5.4 per cent), followed by Tasmania (-4.1 per cent) and New South Wales (-2.8 per cent).

Since 20 June, when restrictions were re-implemented in Victoria, employee jobs have declined only in Victoria (-0.6 per cent), although both jobs and wages in Victoria have consistently improved over the 4 weeks to 14 November, outpacing most other jurisdictions.

Over the period between 14 March to 14 November, total wages fell the most in New South Wales (-5.3 per cent), Western Australia (-5.1 per cent) and Tasmania (-3.9 per cent). Since 20 June, total wages declined in half of the states and territories, with the largest decline in New South Wales (-2.4 per cent).

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

	14 March to 14 November		20 June to 14 November	
	Jobs (%)	Wages (%)	Jobs (%)	Wages (%)
New South Wales	-2.8	-5.3	1.2	-2.4
Victoria	-5.4	-3.3	-0.6	-1.4
Queensland	-1.8	-2.6	2.6	0.2
South Australia	-0.8	-0.7	3.7	1.6
Western Australia	-0.4	-5.1	2.9	1.9
Tasmania	-4.1	-3.9	2.1	-0.3
Northern Territory	0.3	0.7	3.0	2.8
Australian Capital Territory	-3.3	-2.9	1.5	-1.3
<b>Total</b>	<b>-2.9</b>	<b>-3.9</b>	<b>1.4</b>	<b>-0.8</b>

Source: ABS, *Weekly Payroll Jobs and Wages in Australia*, Week ending 14 November 2020.

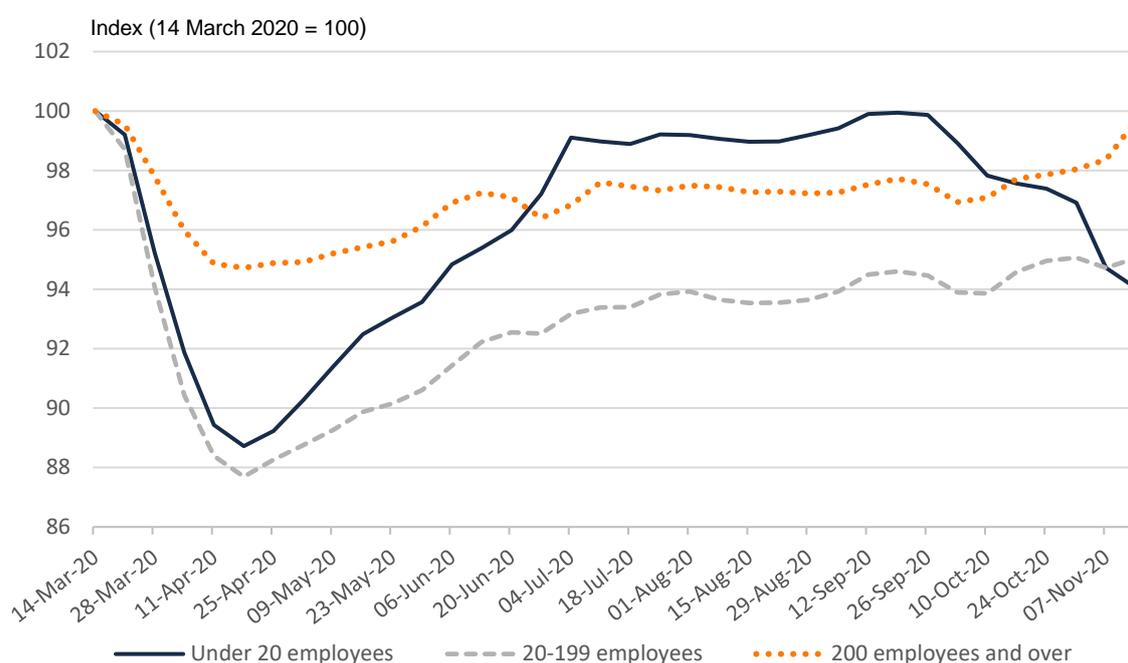
## Employment size

Employee jobs initially declined across all employment sizes to mid-late April before recovering to early July (Chart 5).

The latest data show that the number of employee jobs in small businesses (under 20 employees) recovered relatively strongly to early July and, following a relatively stable period, began to fall from late September. Jobs in medium-sized businesses did not recover by as much and have since improved slightly.

Between 14 March and 14 November, employee jobs declined the most in small businesses (–6.0 per cent) and medium-sized businesses (–5.0 per cent). The overall fall in employee jobs for large businesses (over 200 employees) was relatively small (–0.3 per cent) as they have recovered further in November.

**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 14 November.

The decline in employee jobs since 14 March was largest in Victoria across all business sizes (Table 4). However, since 31 October, the change in employee jobs in Victoria fared better across all business sizes than throughout Australia.

**Table 4: Change in employee jobs, by employment size**

	<b>Change between 14 March and 14 November (%)</b>	<b>Change between 31 October and 14 November (%)</b>
<b>Small (under 20 employees)</b>		
Australia	-6.0	-3.0
Victoria	-8.9	-2.7
<b>Medium (20–199 employees)</b>		
Australia	-5.0	0.0
Victoria	-8.3	0.4
<b>Large (over 200 employees)</b>		
Australia	-0.3	1.7
Victoria	-2.2	2.0

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 14 November 2020.