The Rostering Report

Growing employment as COVID-19 lockdown restrictions ease

The hours worked by most employees are still well down on pre-COVID-19 levels, but the second half of June (17 June to 30 June) showed near universal signs of growth for employees with irregular hours.

- The Hospitality industry continues to be the hardest hit industry, down 30% compared to pre-covid levels. In comparison, the Healthcare industry is 1% up on the February benchmark level.
- Over the period 17 June to 30 June, in the 162 sectors analysed (27 industry sub-sectors across six jurisdictions), only two sub-sectors (Accomodation and Pharmacies/Chemists in the ACT) declined in terms of hours worked.
- South Australians employed on irregular hours have been relatively less affected by the COVID-19 lockdown, possibly reflecting the very low COVID-19 transmission in South Australia.

Why analyse rostering data?

A significant proportion of the Australian workforce is employed with irregular hours. Businesses operating with this flexibility will rapidly expand and contract hours of such employees as demand rises and falls, and can thus be a leading indicator of how the economy responds to various trends.

Deputy collects information on hours worked as part of its cloud-based rostering software.

Analysis of Deputy's rostering data is useful in understanding, in close to real-time, how industries with a significant irregular workforce have been performing. Such information is particularly useful in better understanding how the economy is recovering from the COVID-19 lockdown.

In this analysis we focus on 27 industry sub-sectors in which Deputy manages rostering covering just over 100,000 workplaces and more than 660,000 shift workers. These sub-sectors have been grouped into four headline sectors (Healthcare; Hospitality; Retail; Other Services).

We compare current two-week activity levels (hours worked) to: February (pre-COVID-19 levels); and the previous fortnight.

In future issues we intend to provide projections of changes in hours worked over the the coming fortnight based on forthcoming roster allocations.

Comparison with pre-COVID-19 hours worked

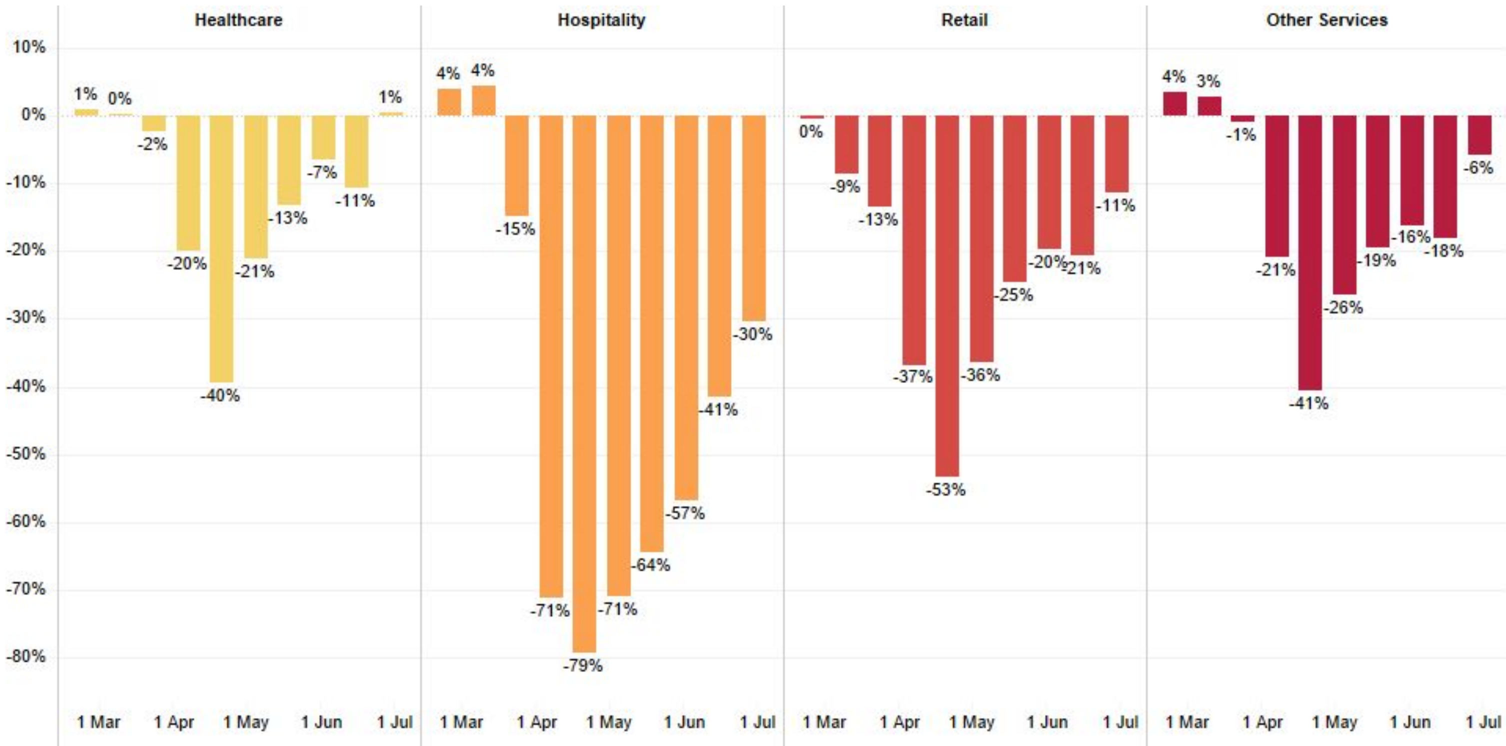
Employment - measured in hours worked - continues to be below pre-COVID-19 levels (with healthcare the standout exception), but has shown ongoing improvements.

In the past fortnight (17-30 June), hours worked in:

- healthcare exceeded activity levels from February 2020 (1% above)
- other industries (Hospitality, Retail, and Other Services) continued to be below February 2020 levels, but all showed considerably higher activity over the past fortnight.

Figure 1: Growth/reduction in hours worked compared to February 2020

Figures presented at the **industry parent** level



Looking across jurisdictions, compared to February 2020, in In the past fortnight (17-30 June) we see:

- the Hospitality industry consistently the most negatively affected (varying from a 20% decline in Queensland to 36% in Victoria)
- that, apart from Hospitality (which is on par with other jurisdictions), South Australia activity has been relatively less affected by the COVID-19 lockdown, possibly reflecting the very low COVID-19 transmission in South Australia.

Figure 2: Change in hours worked when comparing the 17 June - 10 June period to the February 2020 baseline

Figures presented at the **State/Territory** and **industry parent** level

	NSW	VIC	QLD	WA	SA	ACT
Healthcare	5%	2%	3%	8%	16%	-21%
Hospitality	-33%	-36%	-20%	-21%	-27%	-31%
Retail	-2%	-11%	-3%	-13%	5%	-23%
Other Servic..	-7%	-6%	3%	-5%	5%	-13%

Comparison with pre-COVID-19 hours worked (continued)

In comparison to the February 2020 baseline, in the perod 17-30 June:

- negative sectoral results are seen across all jurisdictions for: Bars; Fast Food/Cashier Restaurants; Other Hospitality; Arts, Entertainment & Recreation.
- no sector has seen positive growth in all jurisdictions.

Figure 3: Change in hours worked when comparing the 17 June - 30 June period to the February 2020 baseline

Figures presented at the **State/Territory** and **industry subsector** level

		NSW	VIC	QLD	WA	SA	ACT
Childcare / Community Centres	Healthcare	10%	-6%	-10%	-4%	34%	7%
Dentists	Healthcare	-11%	9%	4%	-6%	6%	0%
Doctors	Healthcare	77%	143%	9%	31%	-11%	-32%
Hospitals	Healthcare	14%	1%	-13%	-6%	-9%	-16%
Other Healthcare Practitioners	Healthcare	2%	1%	5%	15%	18%	-24%
Accommodation	Hospitality	-28%	5%	-47%	61%	-50%	-30%
Bars	Hospitality	-18%	-38%	-34%	-29%	-45%	-39%
Cafes / Coffee shops	Hospitality	-23%	-13%	-20%	-11%	15%	57%
Fast Food / Cashier Restaurants	Hospitality	-21%	-19%	-3%	-13%	-11%	-11%
Sit Down Restaurants	Hospitality	-35%	-23%	-1%	-9%	12%	-23%
Hospitality Other	Hospitality	-40%	-44%	-12%	-27%	-27%	-47%
Clothing & Personal Care Stores	Retail	-7%	-20%	35%	13%	39%	6%
Food & Beverage Stores	Retail	7%	-7%	-16%	-10%	5%	-17%
Pharmacies & Chemists	Retail	2%	0%	-12%	0%	-1%	-27%
Retail Other	Retail	-5%	-12%	2%	-17%	-1%	-27%
Arts, Entertainment & Recreation	Other Services	-26%	-47%	-22%	-49%	-52%	-34%
Construction	Other Services	24%	21%	9%	-7%	-12%	-10%
Education	Other Services	-34%	-7%	9%	-3%	-7%	18%
Employment Services	Other Services	-37%	-29%	-34%	-39%	34%	-21%
Gyms	Other Services	1%	16%	-53%	21%	-12%	15%
Manufacturing	Other Services	18%	-5%	34%	-10%	28%	-25%
Personal & Beauty Services	Other Services	-26%	5%	22%	-24%	-17%	-33%
Professional Services	Other Services	-15%	-5%	14%	30%	-12%	2%
Security Services	Other Services	-7%	62%	-6%	-7%	2%	-61%
Services Other	Other Services	4%	-22%	15%	14%	59%	-16%
Transportation	Other Services	57%	19%	-9%	-3%	-14%	-8%
Warehousing & Storage	Other Services	-14%	2%	2%	-17%	12%	-15%

CEO of Deputy, Ashik Ahmed, says “For workers with irregular and non-guaranteed hours, the COVID-19 lockdown has been a challenge across almost all industries and states. However, hardest hit have tended to be workers in the Hospitality Industry and the Arts, Entertainment & Recreation sector.”

Changes in hours worked over the past fortnight

As restrictions have been progressively eased and businesses and consumers adjusted, in the fortnight 17-30 June, hours worked increased in all industries in all jurisdictions compared to the previous fortnight.

PwC Chief Economist, Jeremy Thorpe, says “The positive growth in hours worked over the last fortnight of June may be tested in coming weeks in jurisdictions where additional constraints placed on activities and movements have recently been put in place to address new COVID-19 outbreaks.”

Figure 4: Change in hours worked when comparing the 17 June - 30 June period to the 3 June - 16 June period

Figures presented at the **State/Territory** and **industry parent** level

	NSW	VIC	QLD	WA	SA	ACT
Healthcare	11%	11%	12%	11%	15%	9%
Hospitality	8%	11%	15%	16%	15%	11%
Retail	11%	9%	10%	9%	13%	7%
Other Servic..	13%	14%	16%	10%	11%	9%

Figure 5: Change in hours worked when comparing the 17 June - 30 June period to the 3 June - 16 June period

Figures presented at the **State/Territory** and **industry subsector** level

		NSW	VIC	ACT	QLD	SA	WA
Childcare / Community Centres	Healthcare	7%	8%	10%	8%	23%	13%
Dentists	Healthcare	13%	14%	13%	15%	11%	10%
Doctors	Healthcare	23%	36%	9%	23%	26%	26%
Hospitals	Healthcare	23%	6%	6%	6%	2%	10%
Other Healthcare Practitioners	Healthcare	10%	12%	9%	11%	14%	11%
Accommodation	Hospitality	1%	41%	-10%	7%	9%	86%
Bars	Hospitality	9%	13%	9%	17%	9%	16%
Cafes / Coffee shops	Hospitality	10%	14%	42%	14%	28%	15%
Fast Food / Cashier Restaurants	Hospitality	9%	13%	5%	17%	7%	7%
Sit Down Restaurants	Hospitality	8%	10%	10%	31%	53%	27%
Hospitality Other	Hospitality	8%	8%	7%	14%	16%	12%
Clothing & Personal Care Stores	Retail	9%	8%	11%	36%	57%	29%
Food & Beverage Stores	Retail	10%	9%	8%	10%	7%	12%
Pharmacies & Chemists	Retail	10%	7%	-7%	6%	8%	2%
Retail Other	Retail	12%	9%	7%	10%	11%	9%
Arts, Entertainment & Recreation	Other Servic..	13%	11%	8%	15%	15%	10%
Construction	Other Servic..	21%	8%	9%	15%	0%	7%
Education	Other Servic..	11%	14%	16%	18%	10%	17%
Employment Services	Other Servic..	6%	7%	7%	4%	16%	23%
Gyms	Other Servic..	66%	95%	28%	12%	23%	37%
Manufacturing	Other Servic..	23%	14%	7%	20%	14%	5%
Personal & Beauty Services	Other Servic..	2%	9%	7%	22%	1%	7%
Professional Services	Other Servic..	8%	13%	7%	19%	10%	15%
Security Services	Other Servic..	7%	15%	2%	11%	7%	5%
Services Other	Other Servic..	11%	8%	12%	18%	18%	12%
Transportation	Other Servic..	19%	48%	11%	11%	8%	5%
Warehousing & Storage	Other Servic..	7%	12%	6%	7%	15%	10%

Methodology overview

The results presented were derived from analysis of information contained in Deputy's rostering platform. We selected 27 sub-sectors for inclusion (excluding smaller sectors and sectors considered unlikely to show much variation). From this we:

- constructed a baseline of rostered and worked hours for February 2020 (i.e. at pre-COVID-19 levels)
- compared actual employee hours worked to this baseline
- developed projections (using rostered hours and days ahead data) to showcase business demand for workers.

We note that percentage changes presented at the sub-sector/state level will display greater variability

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At **PwC**, our purpose is to build trust in society and solve important problems. PwC Australia delivers quality in audit, assurance, consulting and tax services to more than 5000 clients.

We're part of a network of firms in 158 countries with over 250,000 people. PwC is one of the top 50 brands worldwide and PwC Australia is among LinkedIn's top companies for where Australians want to work.

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Deputy provides rostering software delivered in the cloud. It helps hundreds of thousands of people across all industries save time and money managing their workforce so they can focus on what they do best, and be amazing.

Deputy's mission is to make it easy for workplaces and employees to navigate the changing world of workforce management. The company simplifies scheduling, timesheets, tasks and communication for business owners and their workers. Deputy's software navigates workforce legislation calculating correct wages, entitlements and penalties - keeping your business compliant and employees protected. More than 250,000 workplaces globally are leveraging Deputy to make it easier for millions of shift workers to manage their work lives. For more information, visit www.deputy.com.

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