



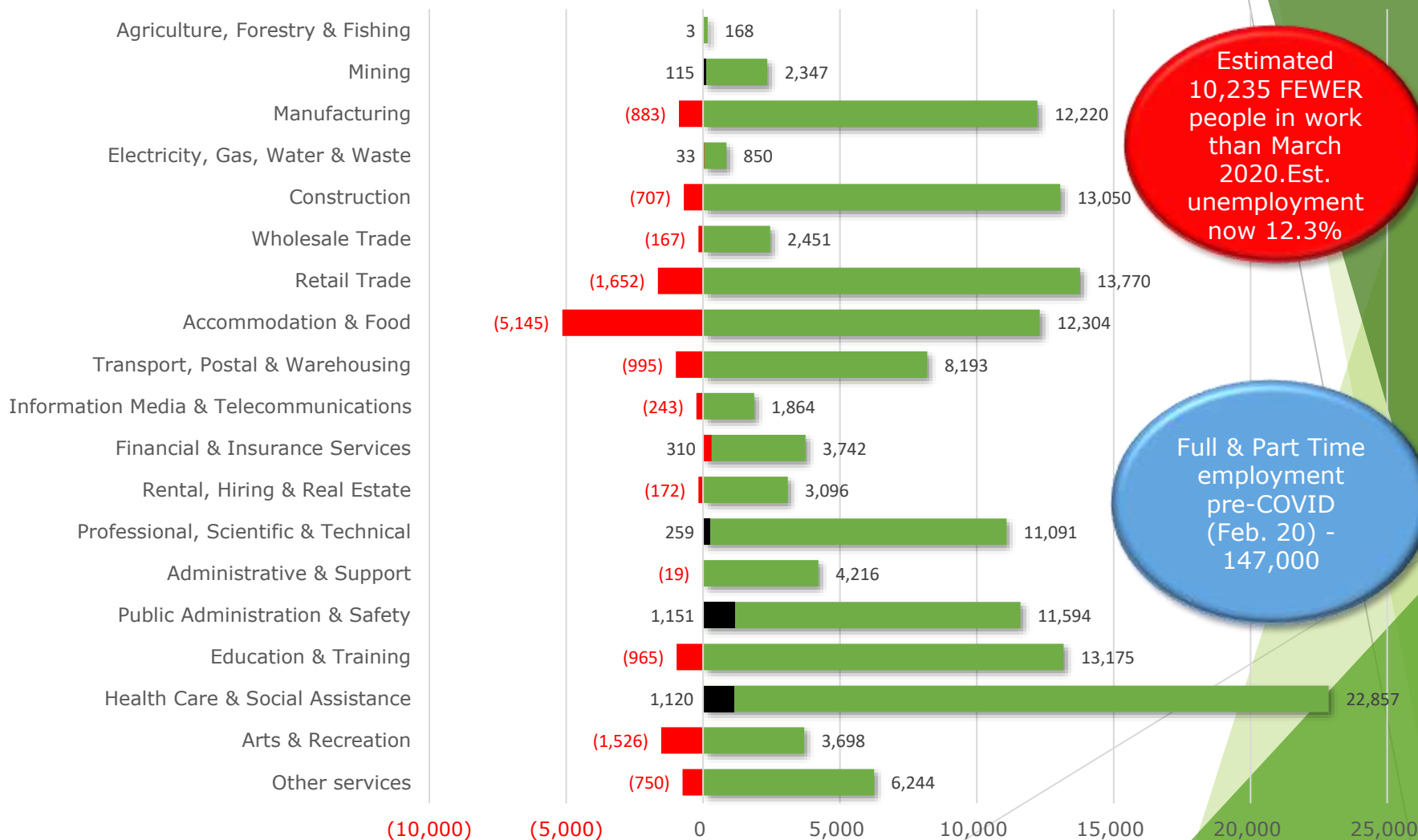
Regional
Development
Australia
I L L A W A R R A

COVID-19: Impact on Jobs & Recovery

Illawarra Region
Data to 11 September 2021

Impact on Employment - Illawarra

Impact **[RED / BLACK]** on Illawarra pre-COVID Employment **[GREEN]**
March 2020 - 11 September 2021



Employment Recovery Trend - Illawarra

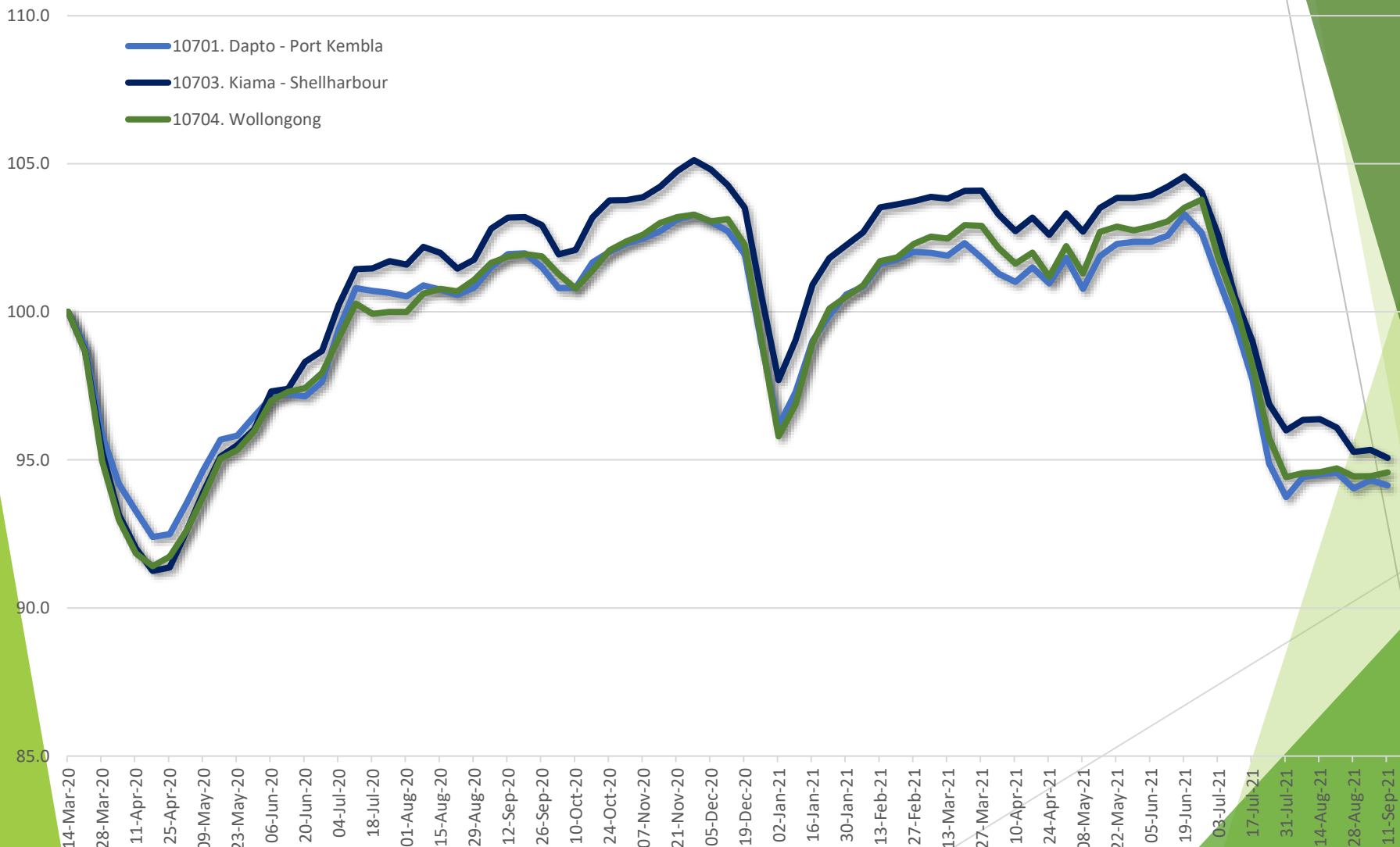
COVID-19: Overall Jobs Impact - Illawarra
March 2020 - 11 September 2021



Employment Recovery Trend - Illawarra

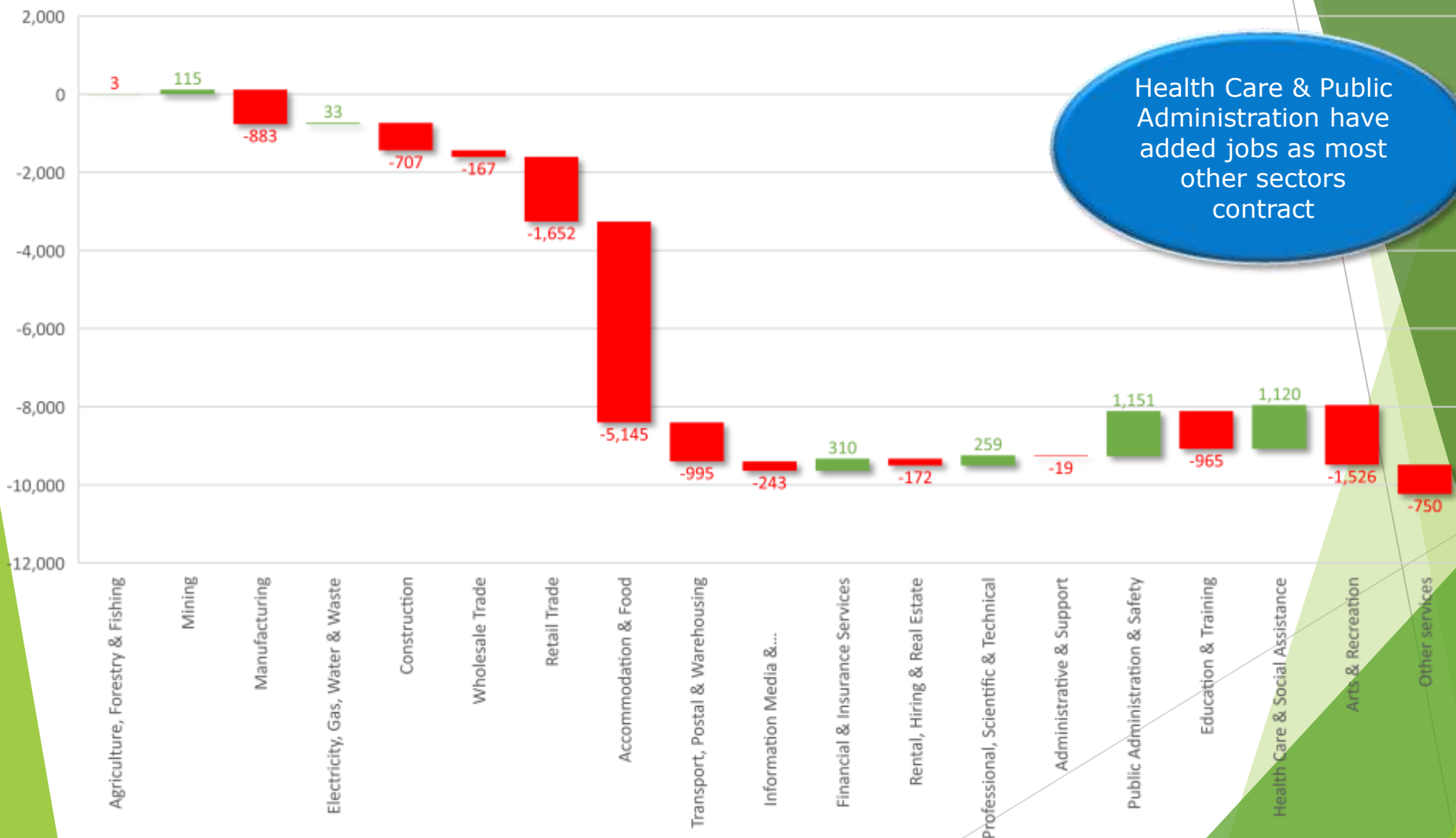
Impact of COVID on Payroll Jobs Index by Illawarra SA4 Region to 11 September

(Indexed to 100 on March 14 2020)



Employment Impact by Sector - Illawarra

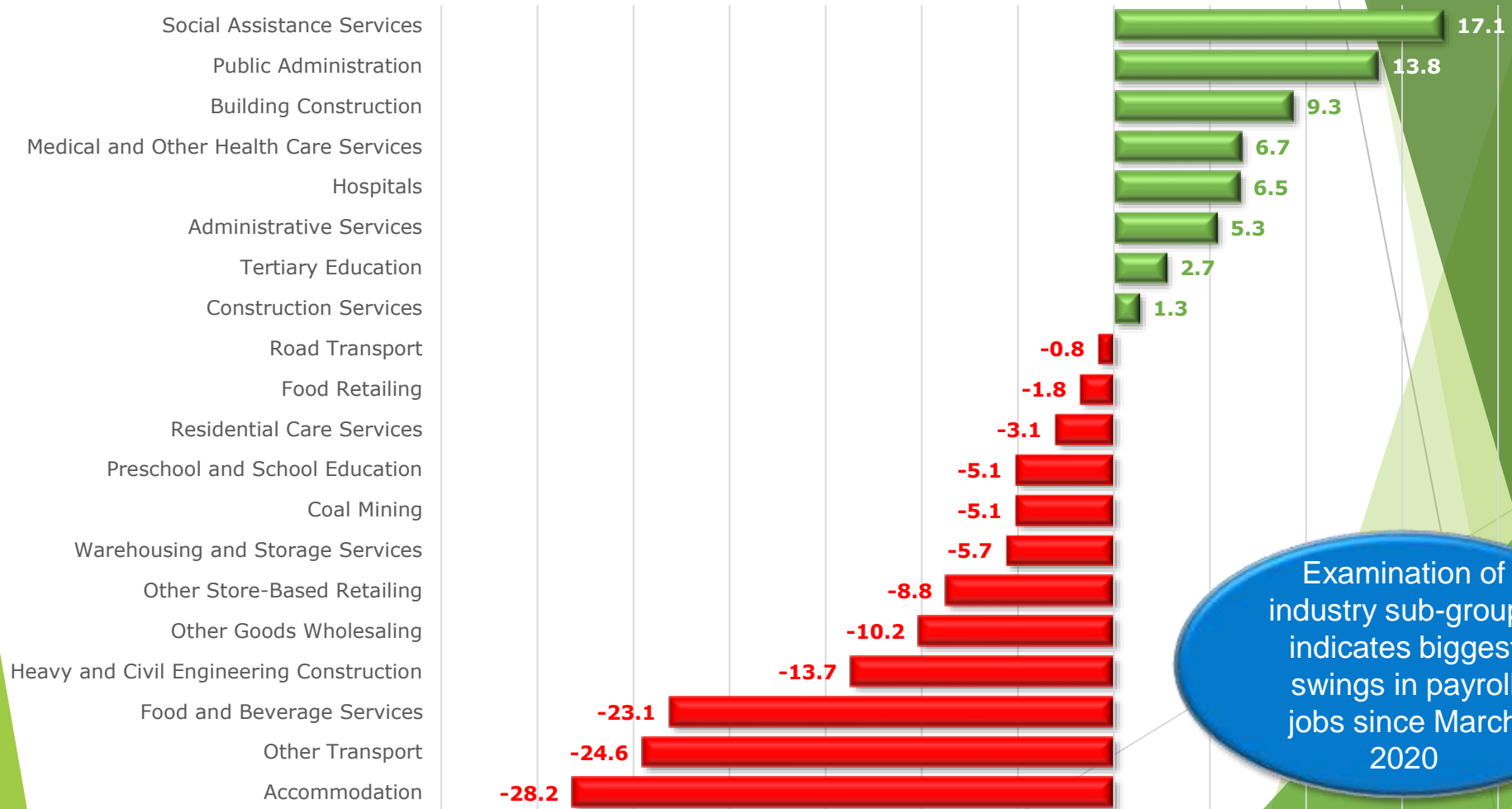
COVID-19: Impact on Illawarra Employment by Sector & Overall
March 2020 - 11 September 2021



Payroll Impact - Australia

COVID Impact - Selected Industry Sub-Group Payroll Index (Australia)

March 2020 - Sept 11 2021

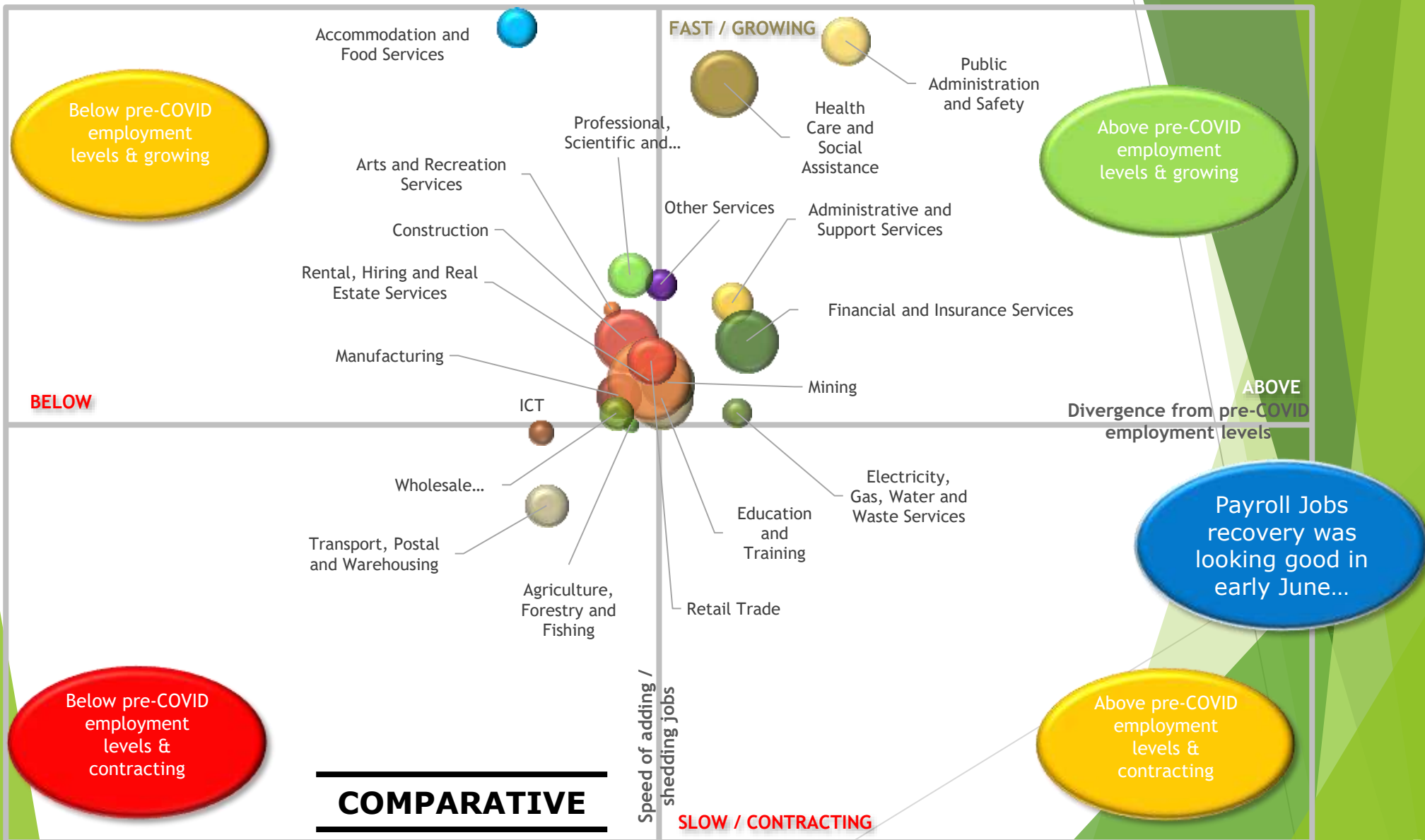


Examination of industry sub-groups indicates biggest swings in payroll jobs since March 2020

Potential Industry Sector Recovery - Illawarra

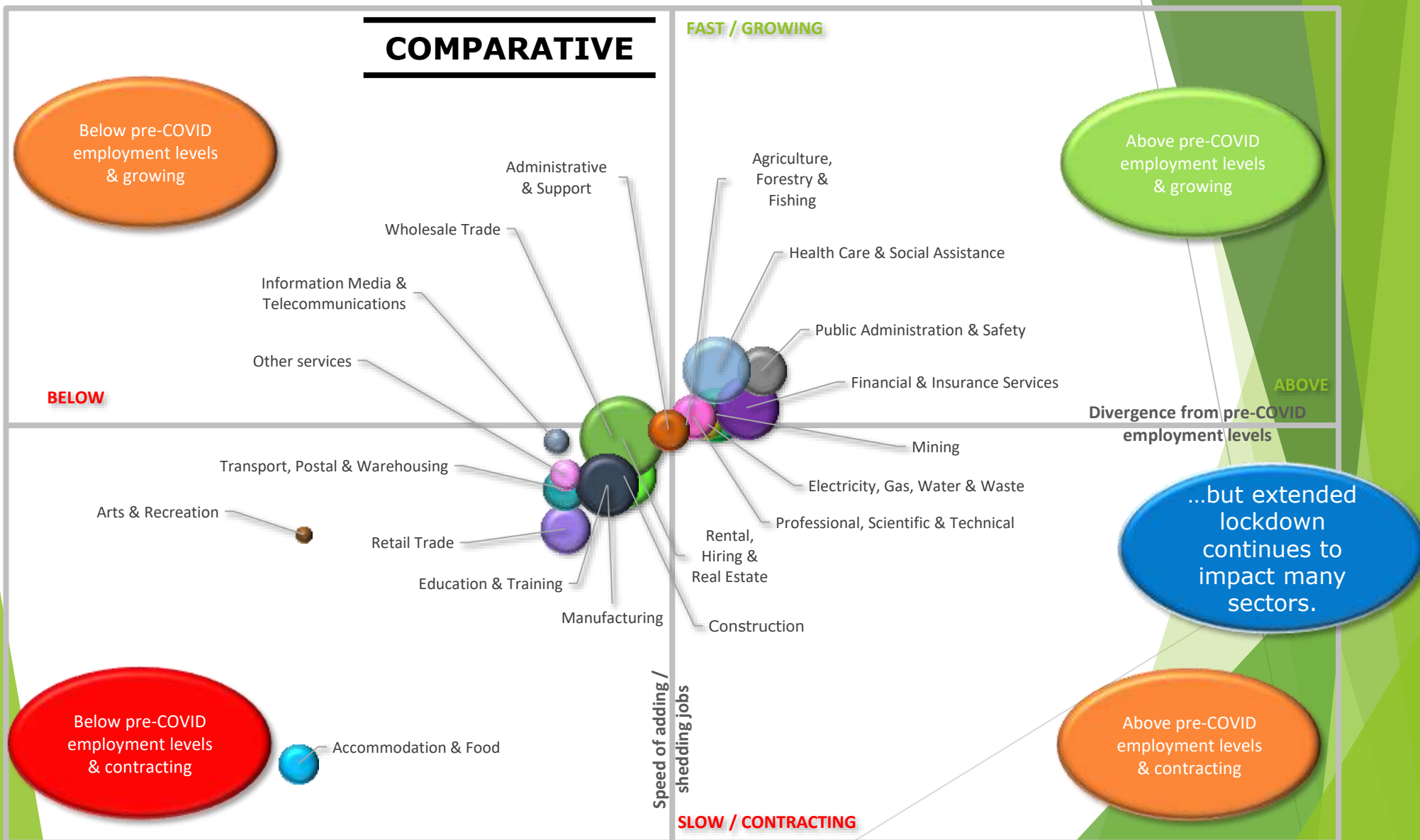
Speed of Recovery & Distance from pre-COVID Employment Levels

(4 April – 5 June 2021. Balloon size indicates regional value-add by segment. Scaled)



Potential Industry Sector Recovery - Illawarra

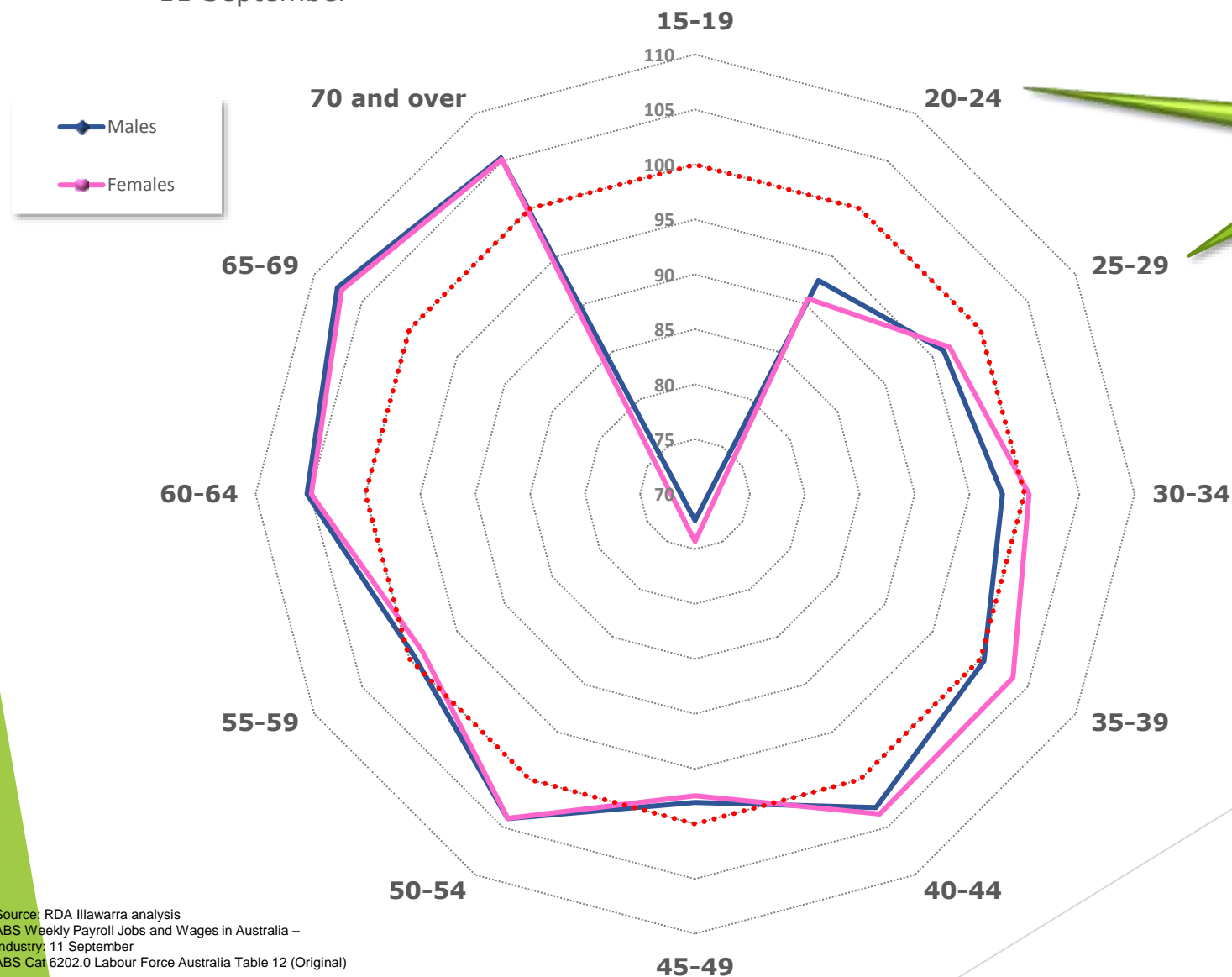
Rate of Change & Distance from Pre-COVID Employment Levels
(4 March 2020 - 11 September 2021. Balloon size indicates regional value-add by segment. Scaled)



Jobs Impact by Age (Australia)

Payroll jobs Indexed by Age

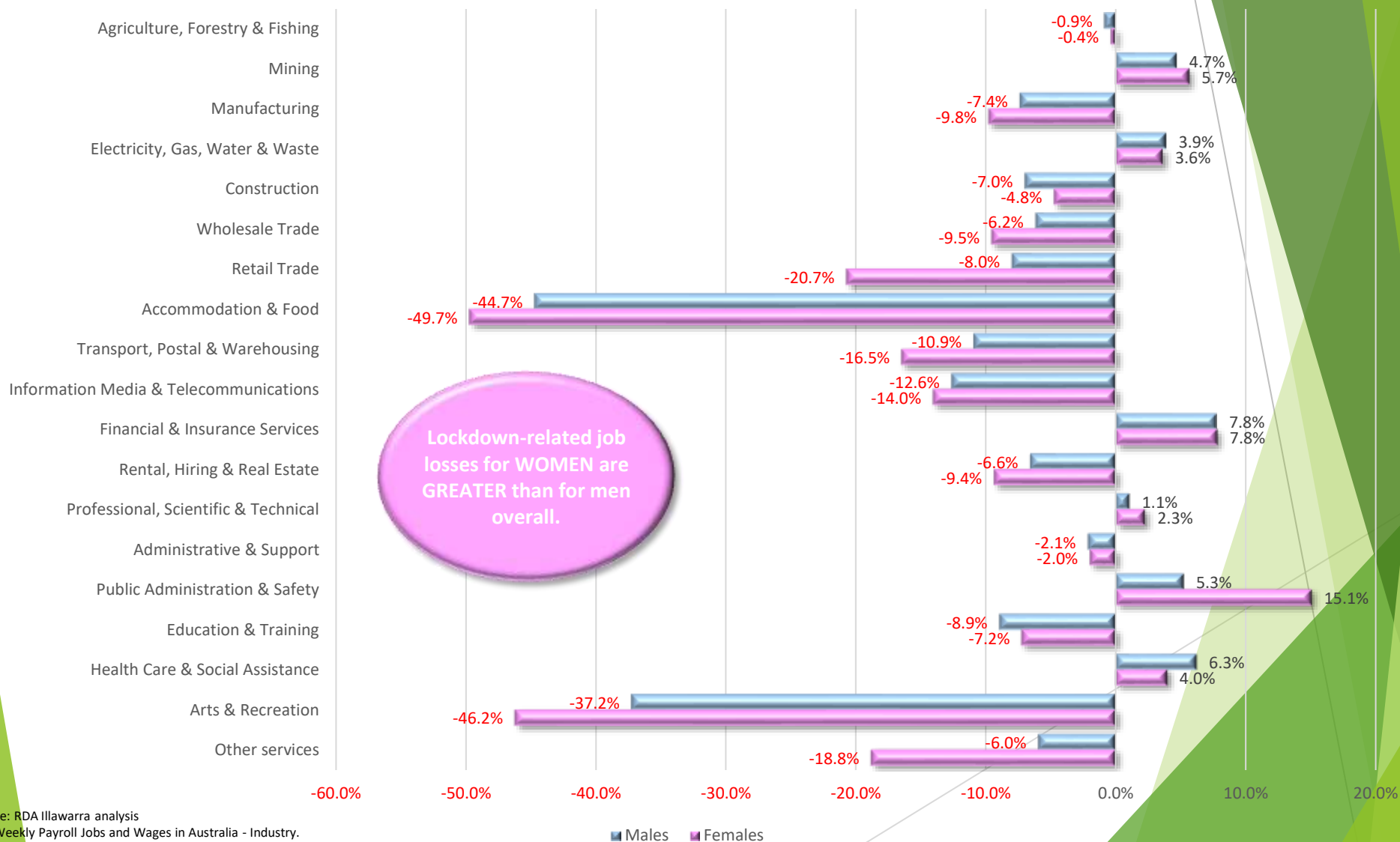
11 September



Younger people most affected by a reduction in Payroll Jobs. Older workers continue to add to the workforce.

Jobs Impact by Gender (NSW)

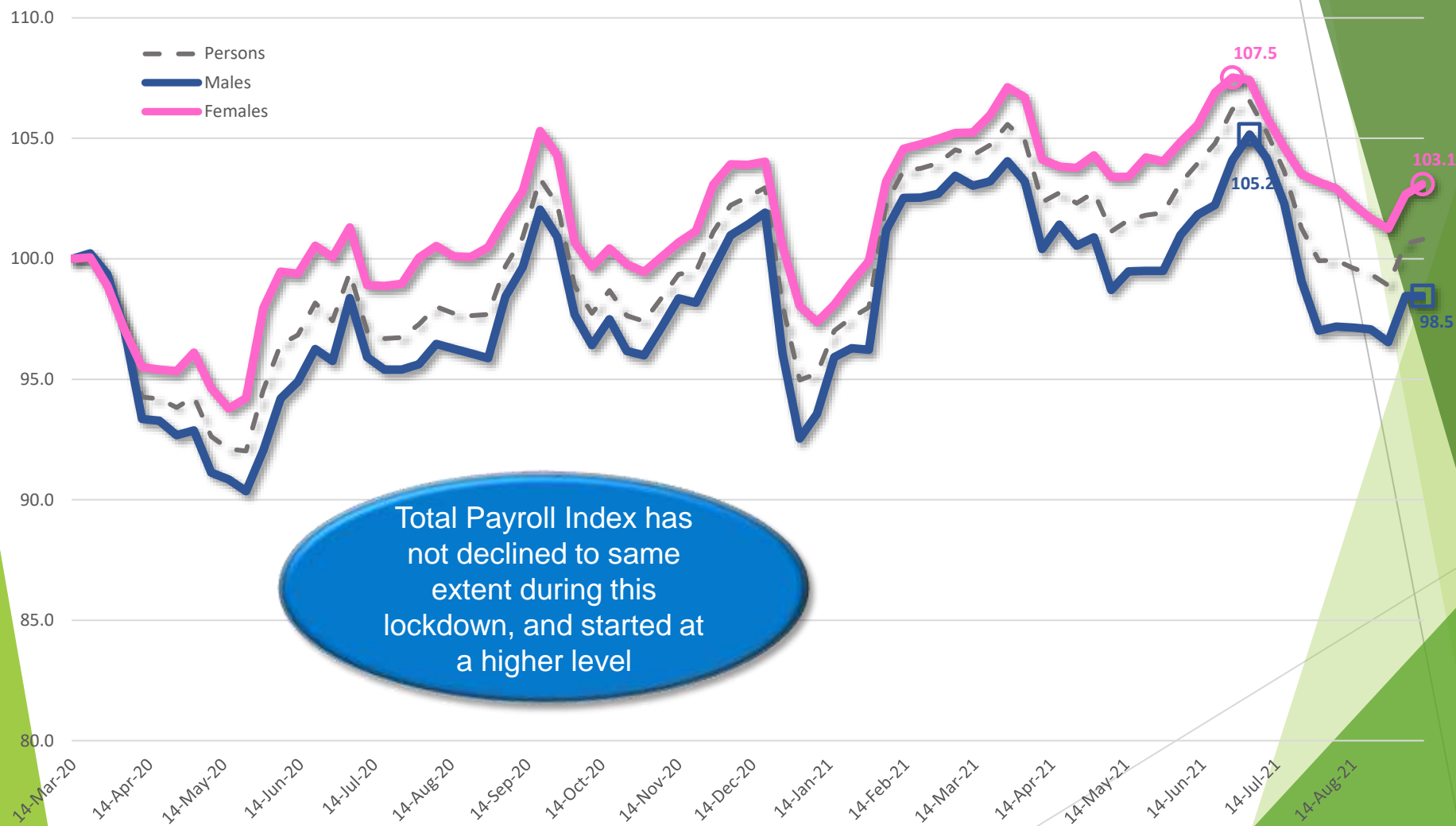
COVID-19 Impact on Jobs by Sector & Gender - NSW (11 September 2021 data)



Payroll Impact Overall & by Gender - NSW

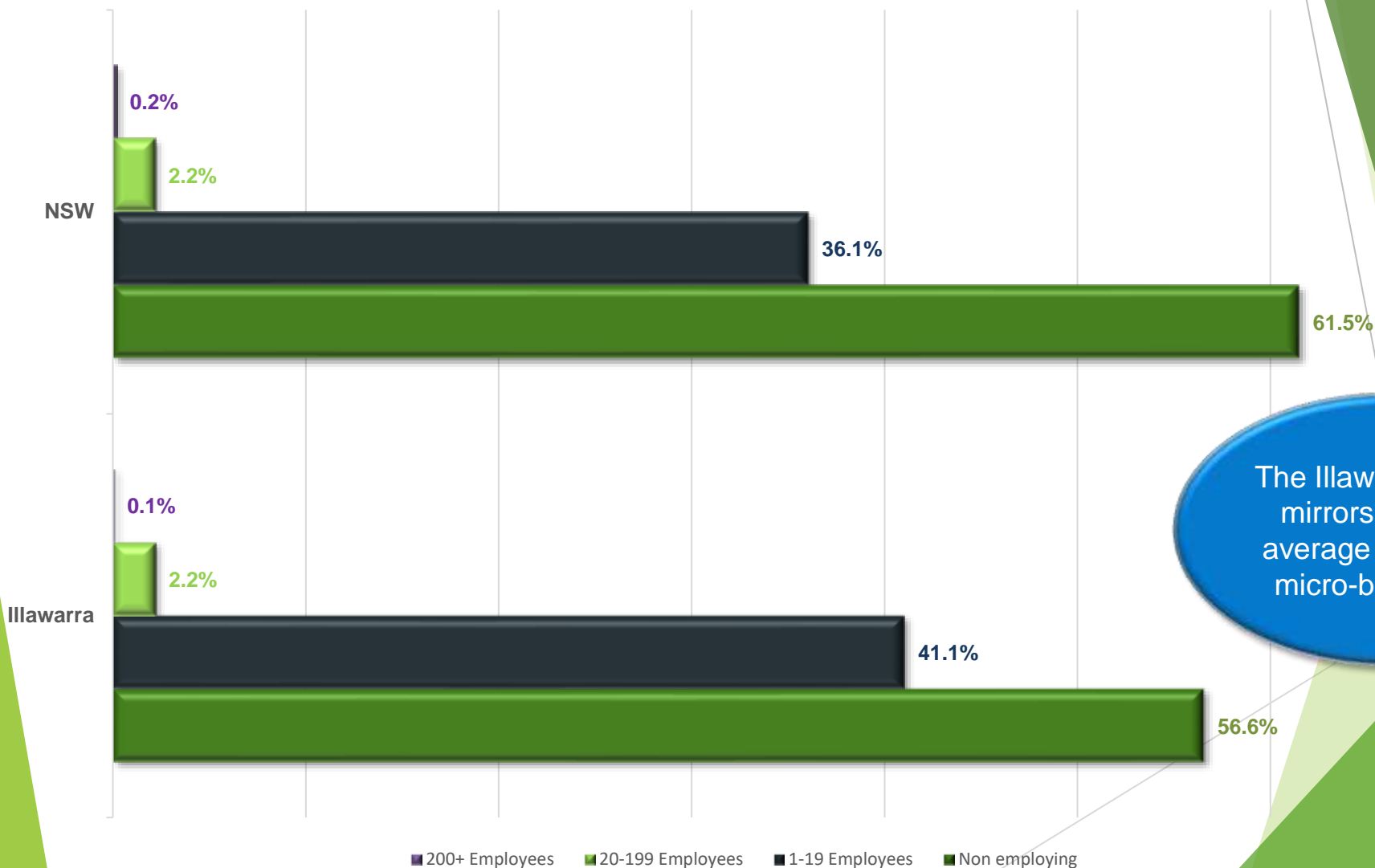
COVID Impact - Total Payroll Index (NSW)

March 2020 - 11 September



Business Size – Illawarra & NSW

Illawarra & NSW - Comparison by Business Size (No. of Businesses)



The Illawarra closely mirrors the State average for small & micro-businesses

Businesses by Sector– Illawarra & NSW

Illawarra vs. NSW Comparison of Sectors by Business Size (% of businesses)
(LH Bars=Illawarra: RH Bars=NSW)



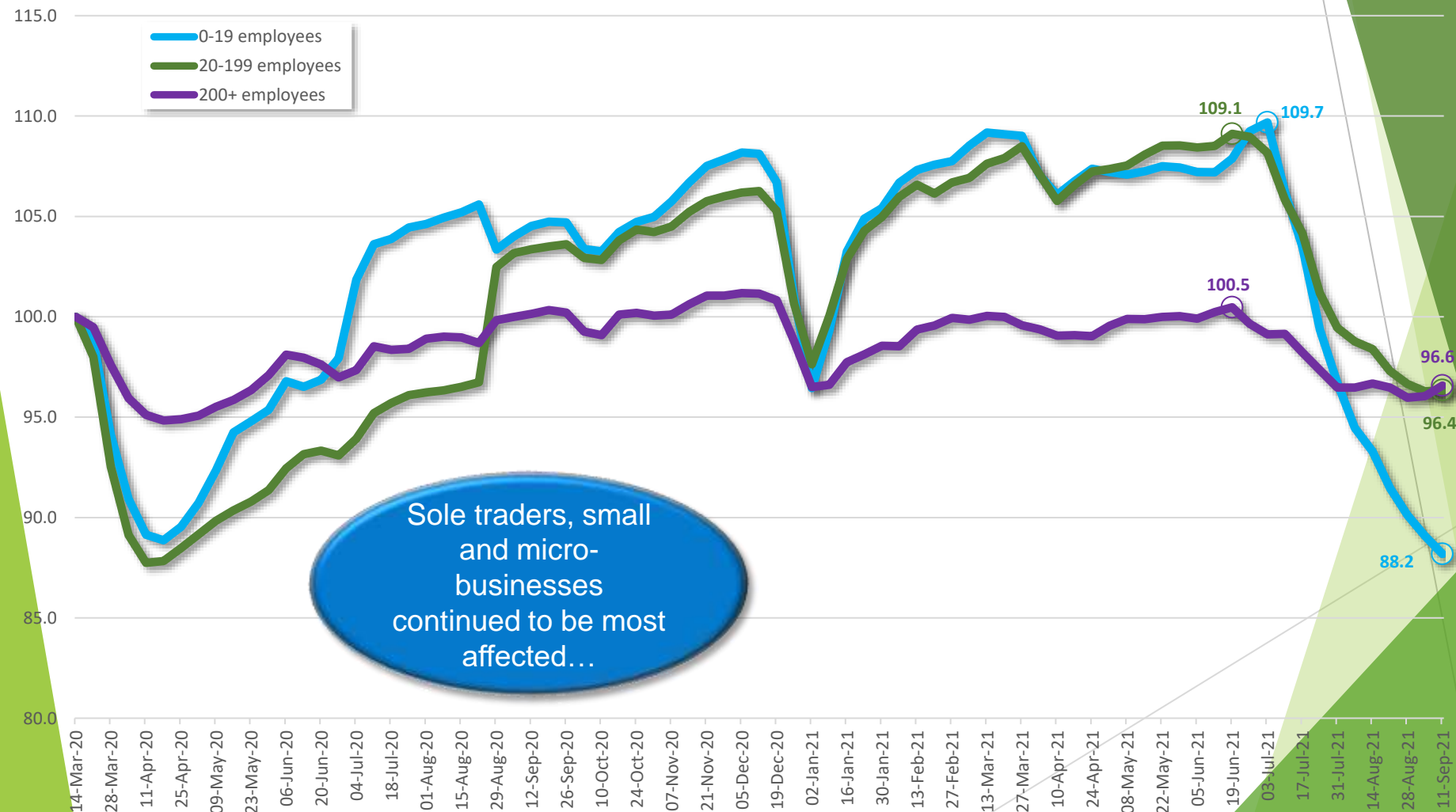
Illawarra has more organisations in badly affected sectors including Hospitality, Arts, Construction, Retail & Manufacturing

Employment Impact by Business Size - NSW

Impact on Payroll Numbers by Business Size (NSW)

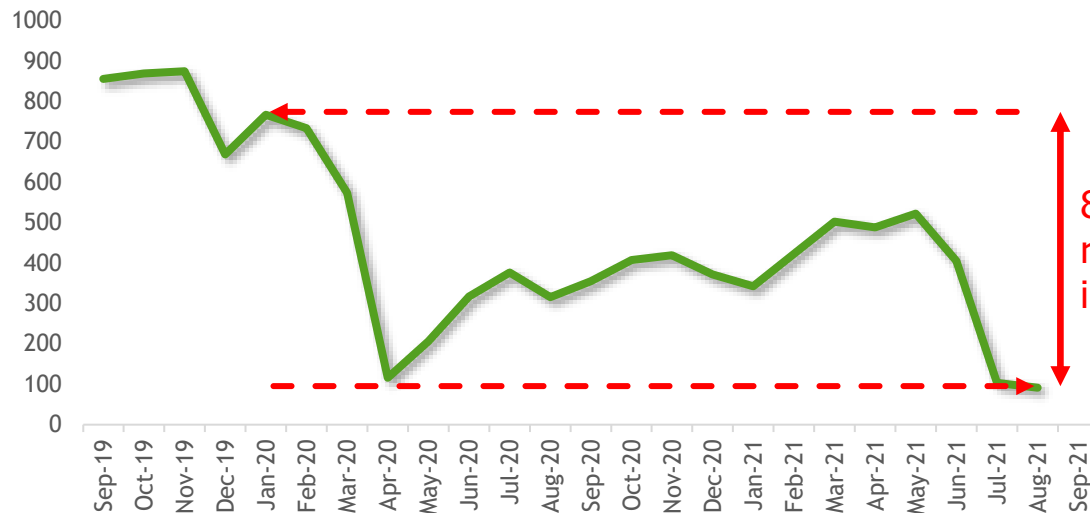
March 2020 - 11 September 2021

(Indexed to 100 at March 2020)



Impact on Commuting Habits

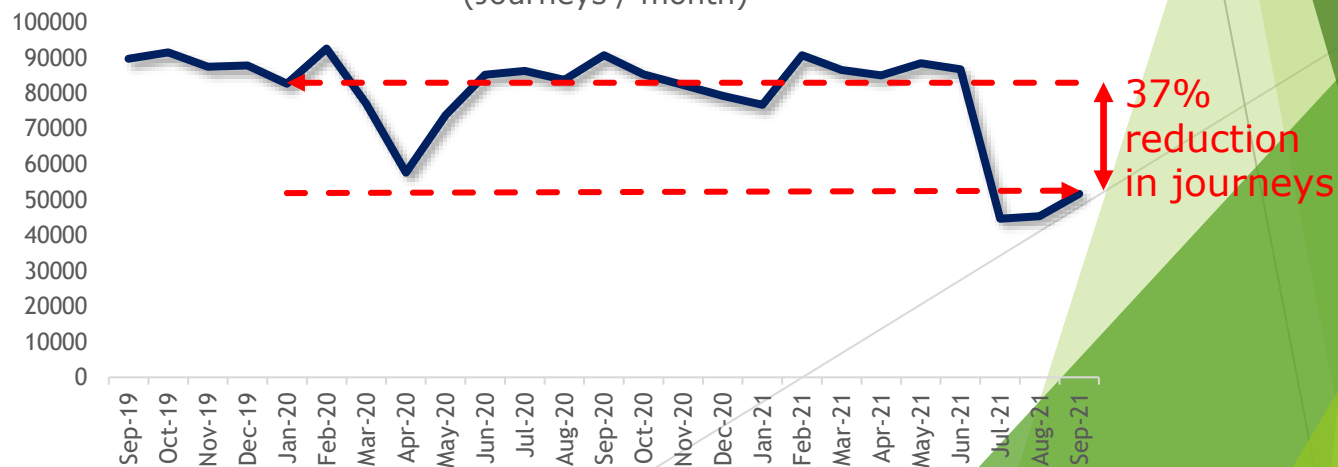
Rail Commuting - South Coast Line
(Journeys / month 000's)



This lockdown has seen a marked reduction in both rail and road commuting

88% reduction in journeys

Road Commuting - Major Routes
Illawarra to Sydney
(Journeys / month)



37% reduction in journeys

Q + A

SOURCES:

Australian Bureau of Statistics

1. 6291.0.55.003 RQ1 Quarterly employed persons by Industry division
 2. 8165.0 Counts of Australian Businesses, including Entries and Exits, June 2016 to June 2020 (Released 16 February 2021)
 3. ABS Cat 6202.0 Labour Force Australia Table 12, Original (Release 18 June 2020)
 4. COVID-19 STP data (Released 26 August 2021):-
 - Weekly Payroll Jobs and Wages in Australia – Industry
 - Weekly Payroll Jobs and Wages in Australia - Payroll Jobs & Wages indices
 - Payroll Jobs Index by SA4 - Persons, All ages, STP-enabled businesses
 - Business Impact Survey
 5. JobKeeper organisation application count by postcode for August JobKeeper fortnights
- REMPPLAN - Regional Value-Add (based on ABS data)

NOTES:

- a) Registered organizational JobKeeper uptake used as an initial proxy for impact on industry sectors and their potential recovery
- b) State-wide industry sector data weighted to reflect potential impact at SA4 level
- c) 99% of substantial employers (20+) & 77% of small employers report through STP
- d) All care has been taken in the preparation of these charts, using available data from reliable sources but RDA Illawarra take no responsibility for any inaccuracies in data or analysis.