



Research Report 4/2013

Retail trade industry profile

RSRT & Minimum Wages Research Team, Tribunal Services Branch—Fair Work Commission

February 2013

The contents of this report are the responsibility of the researchers and the research has been conducted without the involvement of members of the Fair Work Commission.

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All research undertaken by the Fair Work Commission for the Annual Wage Review 2012–2013 has been agreed by the Research Group. The Research Group comprises a Chair from the RSRT & Minimum Wages Research Team, Tribunal Services Branch of the Fair Work Commission, and representatives nominated by:

- Australian Chamber of Commerce and Industry (ACCI);
- Australian Industry Group (Ai Group);
- Australian Council of Social Services (ACOSS);
- Australian Council of Trade Unions (ACTU);
- Australian Government; and
- state and territory governments.

A draft of the report was circulated to the Research Group prior to finalisation. The RSRT & Minimum Wages Research Team would like to thank the Research Group for its comments.

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1 Industry Overview

1.1 Economic indicators

Table 1.1: Contribution of Retail trade to the Australian economy, 2011–12

	Retail trade	Percentage of total
Gross value added (\$m)	63 573	4.7
Sales (\$m)	339 661	15.0
Employment ('000s)	1214	10.6
Actual hours worked per week ('000s)	35 203	9.0
Wages and salaries (\$m)	37 756	6.0
Gross fixed capital formation (\$m)	5608	1.4
Net capital stock (\$m)	63 427	1.4

Note: Gross value added is expressed in original and real terms, from chain volume estimates. Sales is the sum of quarterly estimates from September 2011 to June 2012. Sales are expressed in real terms from chain volume estimates. Employment and actual hours worked per week figures are averaged over the four quarters from August 2011 to May 2012. Actual hours worked per week is expressed in original terms. Wages and salaries (\$m) data are collected from the *Australian System of National Accounts* and are expressed in original and nominal terms, from current price estimates. Gross fixed capital formation and net capital stock is expressed in original and real terms, from chain volume estimates.

Source: ABS, *Australian System of National Accounts, 2011–12*, Catalogue No. 5204.0; ABS, *Business Indicators, Australia, Sep 2012*, Catalogue No. 5676.0; ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

1.2 Earnings

Table 1.2: Average hourly cash earnings of full-time non-managerial adult employees in Retail trade industry, by subdivision, August 2008, May 2010 and May 2012

Industry subdivision/group	2008	2010	2012
Motor vehicle and motor vehicle parts retailing	23.20	25.10	28.50
Fuel retailing	26.10	21.30	25.10
Food retailing	21.60	24.20	23.50
Other store-based retailing	22.70	24.20	24.60
Non-store retailing and retail commission-based buying and/or selling	–	–	–
Retail trade	22.60	24.40	25.20
All industries	30.10	32.20	34.70

Note: Average hourly cash earnings are not published for Non-store retailing and retail commission-based buying and/or selling but are included in the industry total and all industries.

Source: ABS, *Employee Earnings and Hours, Australia, various*, Catalogue No. 6306.0.

2 Industry structure and performance

2.1 Industry structure

Table 2.1: Industry value added by Retail trade subdivisions, 2008–09 to 2010–11

	2008–09		2009–10		2010–11	
	Value added (\$m)	% of industry value added	Value added (\$m)	% of industry value added	Value added (\$m)	% of industry value added
Motor vehicle and motor vehicle parts retailing	8154	13.5	9049	14.2	8274	12.1
Fuel retailing	2746	4.6	2688	4.2	2877	4.2
Food retailing	17 068	28.3	18 623	29.2	20 229	29.6
Other store-based retailing	31 581	52.4	32 477	50.9	35 549	52.1
Non-store retailing and retail commission-based buying and/or selling	776	1.3	984	1.5	1299	0.1
Retail trade	60 325	100.0	63 822	100.0	68 228	100.0

Note: The estimate of industry value added in Non-store retailing and retail commission-based buying and/or selling in 2008–09 has a relatively large standard error of between 25 and 50 per cent and should be interpreted with caution.

Source: ABS, *Australian Industry, 2010–11*, Catalogue No. 8155.0.

Table 2.2: Wages and salaries by business size, 2008–09 to 2010–11

	Percentage of industry total		
	2008–09	2009–10	2010–11
Retail trade			
Small	33.8	34.1	33.3
Medium	21.9	21.5	23.8
Large	44.3	44.4	43.0
Total selected industries			
Small	29.5	31.4	29.5
Medium	28.3	26.7	27.7
Large	42.1	41.9	42.8

Note: Small businesses employ fewer than 20 persons, medium businesses employ between 20 to 199 persons and large businesses employ 200 or more persons. Total selected industries excludes Financial and insurance services.

Source: ABS, *Australian Industry, 2010–11*, Catalogue No. 8155.0.

Table 2.3: Sales and service income by business size, 2008–09 to 2010–11

	Percentage of industry total		
	2008–09	2009–10	2010–11
Retail trade			
Small	32.1	31.9	32.4
Medium	24.9	25.1	24.3
Large	43.0	43.0	43.3
Total selected industries			
Small	31.9	33.6	31.9
Medium	24.8	24.4	25.4
Large	43.3	42.0	42.7

Note: Small businesses employ fewer than 20 persons, medium businesses employ between 20 to 199 persons and large businesses employ 200 or more persons. Total selected industries excludes Financial and insurance services.

Source: ABS, *Australian Industry, 2010–11*, Catalogue No. 8155.0.

Table 2.4: Industry value added by business size, 2008–09 to 2010–11

	Percentage of industry total		
	2008–09	2009–10	2010–11
Retail trade			
Small	36.2	37.0	38.7
Medium	20.2	19.3	19.2
Large	43.6	43.6	42.1
Total selected industries			
Small	34.0	35.2	33.7
Medium	23.6	22.5	23.4
Large	42.5	42.3	42.9

Note: Small businesses employ fewer than 20 persons, medium businesses employ between 20 to 199 persons and large businesses employ 200 or more persons. Total selected industries excludes Financial and insurance services.

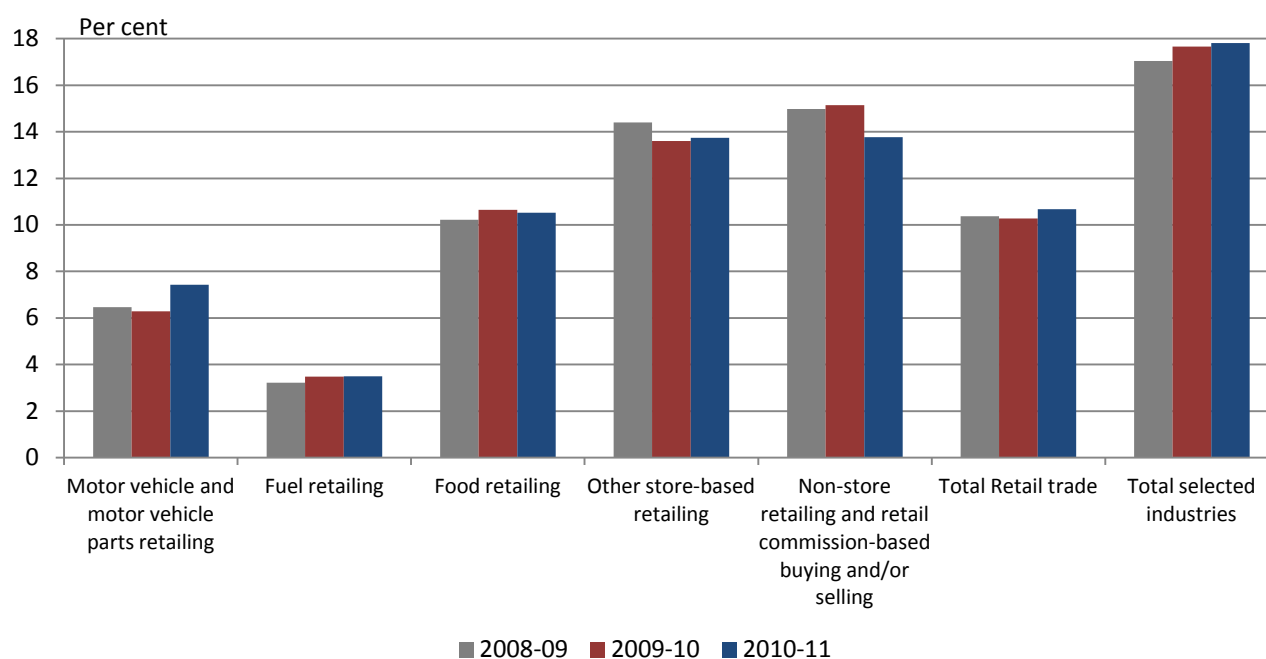
Source: ABS, *Australian Industry, 2010–11*, Catalogue No. 8155.0.

Table 2.5: Industry gross value added by Retail trade, by state/territory, 2011–12

	Percentage of national Retail value added	Percentage of Retail value added by state/territory
New South Wales	27.7	4.3
Victoria	26.7	5.7
Queensland	22.5	5.4
South Australia	7.1	5.4
Western Australia	11.5	3.2
Tasmania	2.2	6.2
Northern Territory	0.9	3.4
Australian Capital Territory	1.4	3.0
Australia	100.0	4.7

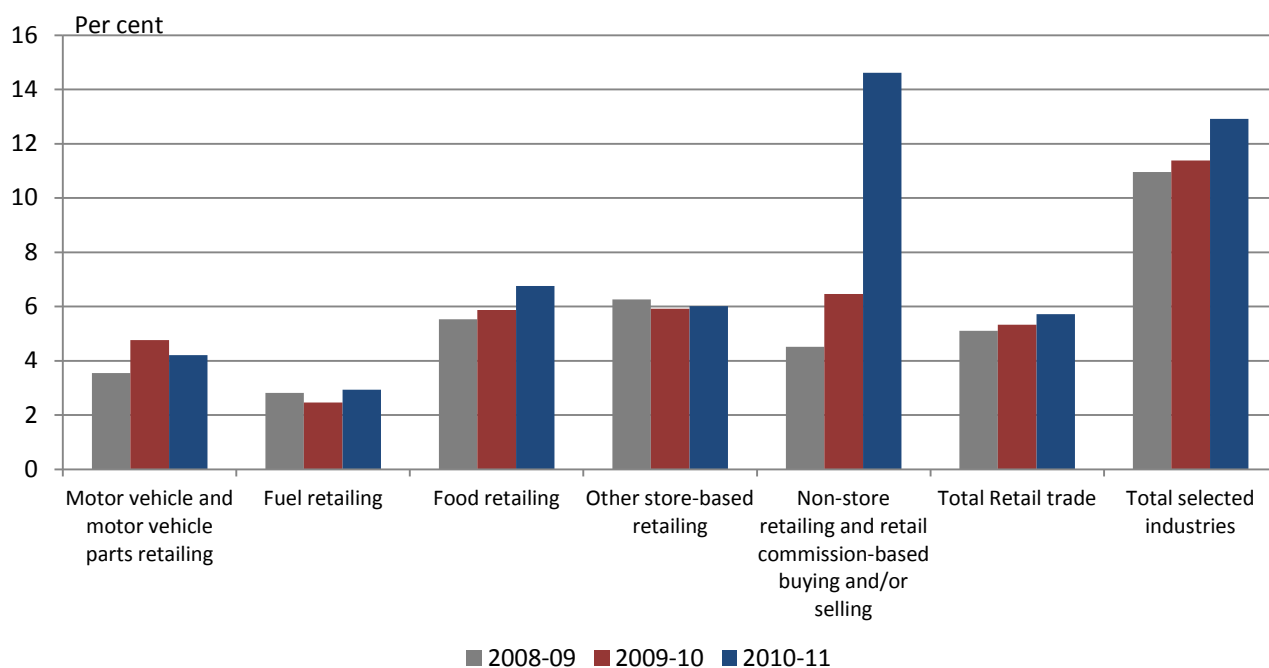
Source: ABS, *Australian National Accounts: State Accounts, 2011–12*, Catalogue No. 5220.0.

2.2 Income and cost structure

Figure 2.1: Wages and salaries as percentage of total expenses, by subdivision, 2008–09 to 2010–11

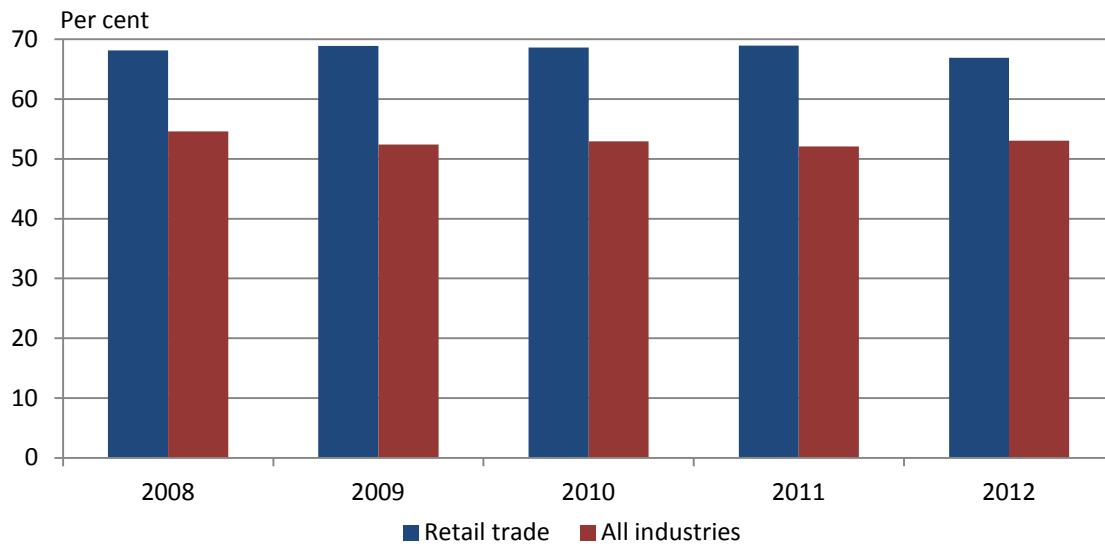
Note: Total selected industries excludes Financial and insurance services. The estimate of wages and salaries in Non-store retailing commission-based buying and/or selling in 2008–09 has a relatively large standard error of between 25 and 50 per cent and should be interpreted with caution.

Source: ABS, *Australian Industry, 2010–11*, Catalogue No. 8155.0.

Figure 2.2: Profit margins by subdivision, 2008–09 to 2010–11

Note: Profit margins are calculated as the percentage of sales and service income available as operating profit before tax. Total selected industries excludes Financial and insurance services. The estimate of operating profit before tax in Non-store retailing commission-based buying and/or selling in 2008–09 has a relatively large standard error of over 50 per cent and should be interpreted with caution. Estimates of operating profit before tax in Motor vehicle and motor vehicle parts retailing in 2009–10 and 2010–11, Fuel retailing in 2010–11 and Non-store retailing and retail commission-based buying and/or selling in 2009–10 have a relatively large standard error of between 25 and 50 per cent and should be interpreted with caution.

Source: ABS, *Australian Industry, 2010–11*, Catalogue No. 8155.0.

Figure 2.3: Wages share of total factor income, June 2008 to June 2012

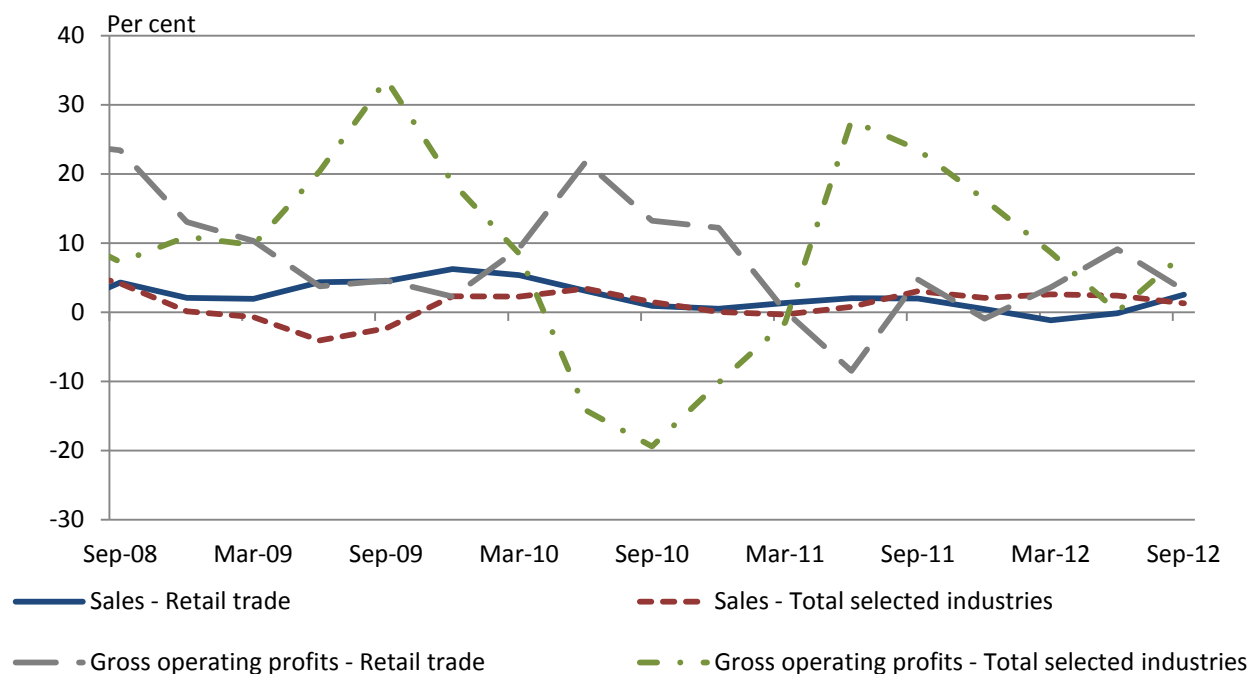
Source: ABS, *Australian System of National Accounts, 2011–12*, Catalogue No. 5204.0.

Figure 2.4: Profit and gross mixed share of total factor income, June 2008 to June 2012

Source: ABS, *Australian System of National Accounts, 2011–12*, Catalogue No. 5204.0.

2.3 Industry performance

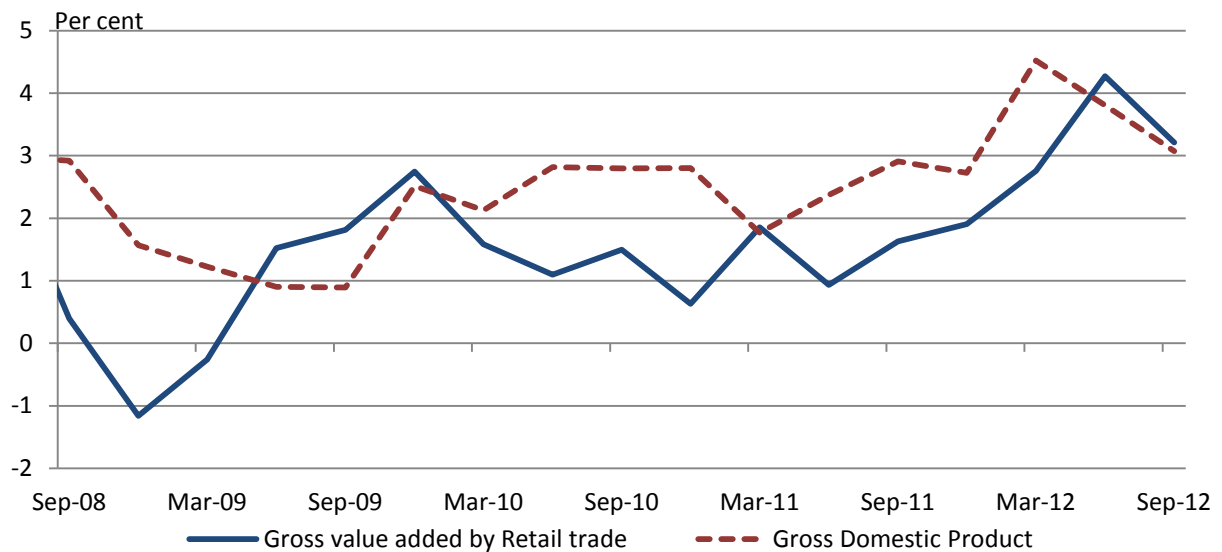
Figure 2.5: Sales and company gross operating profits in Retail trade, annual percentage change, September 2008 to September 2012



Note: Sales of goods and services and gross operating profit estimates are not available for Education and training and Health care and social services, as well as Depository financial intermediation and Insurance superannuation funds subdivisions from Finance and insurance services. Sales is expressed in real terms, from chain volume estimates. Gross operating profits is expressed in nominal terms, from current price estimates.

Source: ABS, *Business Indicators, Australia, Sep 2012*, Catalogue No. 5676.0.

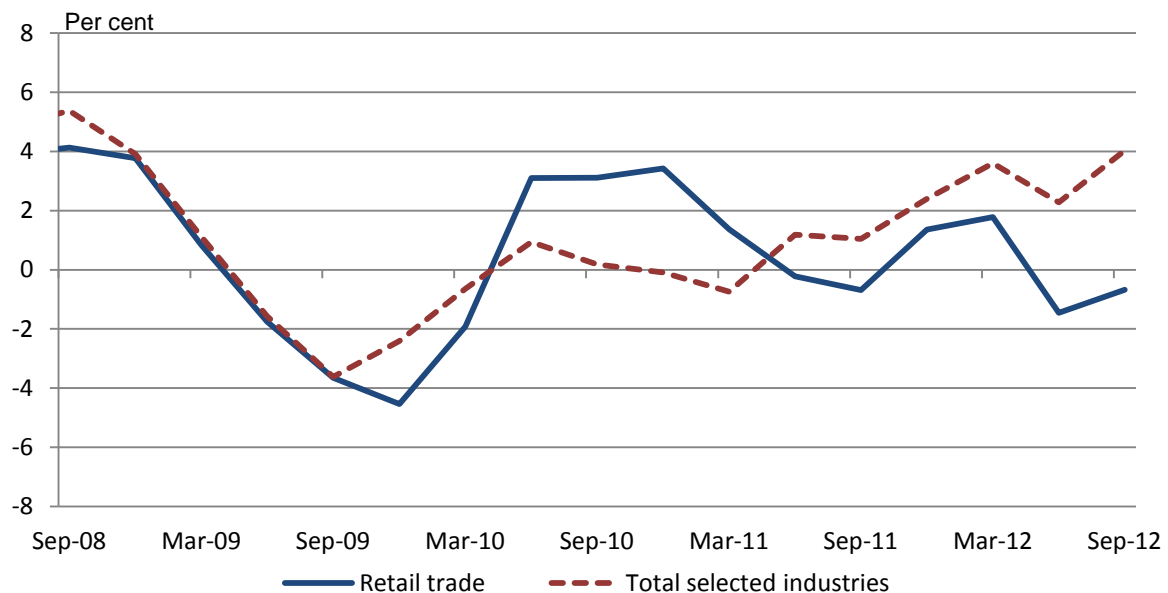
Figure 2.6: Growth in real output, annual percentage change, September 2008 to September 2012



Note: All data are expressed in real terms from chain volume estimates.

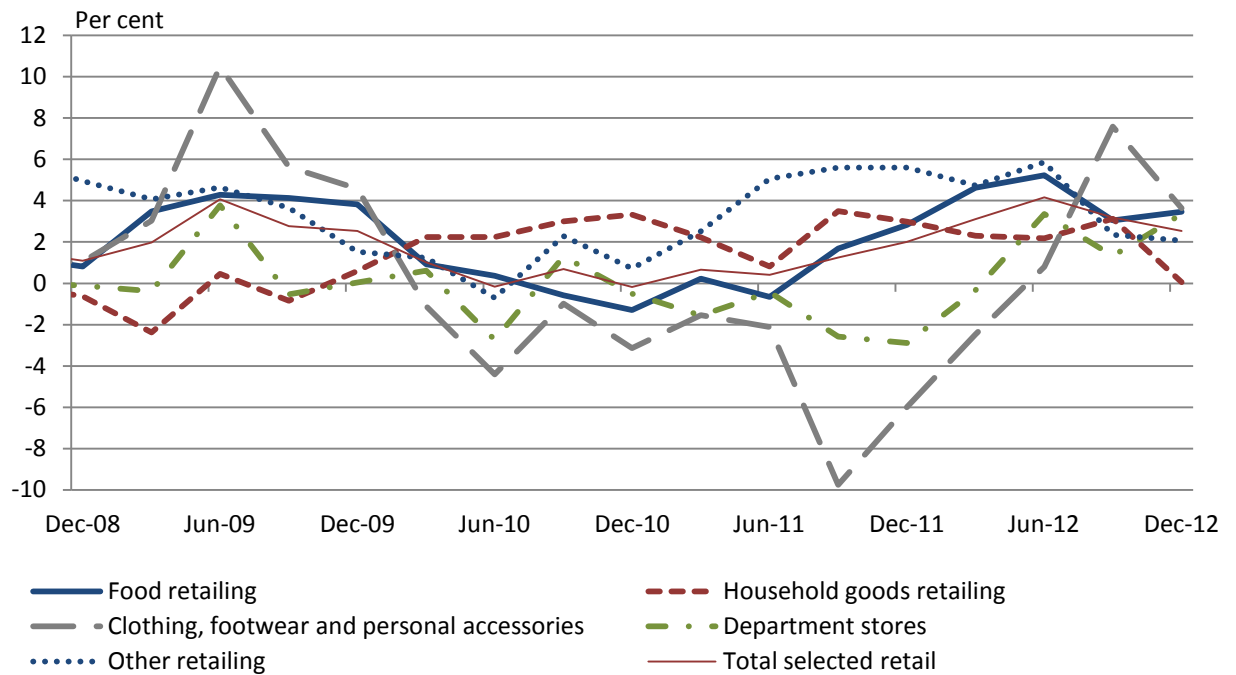
Source: ABS, *Australian National Accounts: National Income, Expenditure and Product, Sep 2012*, Catalogue No. 5206.0.

Figure 2.7: Retail trade inventories, annual percentage change, September 2008 to September 2012



Note: All data are expressed in real terms from chain volume estimates. Data on inventories are collected for Mining, Manufacturing, Electricity, gas, water and waste services, Wholesale trade, Retail trade and Accommodation and food services.

Source: ABS, *Business Indicators, Australia, Sep 2012*, Catalogue No. 5676.0.

Figure 2.8: Retail turnover, annual percentage change, December 2008 to December 2012

Note: All data are expressed in real terms from chain volume estimates.

Source: ABS, *Retail Trade, Australia, Dec 2012*, Catalogue No. 8501.0.

3 Labour market structure and trends

3.1 Industry workforce

Table 3.1: Employed persons by gender and employment status, November 2012

	Retail trade		All industries
	No. ('000s)	Percentage of industry employment	Percentage of total employment
Men			
Full-time	356.5	28.9	45.7
Part-time	162.6	13.2	8.5
Women			
Full-time	280.5	22.7	24.9
Part-time	433.7	35.2	20.9
Total	1233.3	100.0	100.0

Note: All data are expressed in original terms.

Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

Table 3.2: Employed persons by age, November 2012

Age (yrs)	Retail trade		All industries
	No. ('000s)	Percentage of industry employment	Percentage of total employment
15–19	205	16.6	5.7
20–24	213	17.3	10.3
25–34	244	19.8	22.7
35–44	205	16.6	22.4
45–54	205	16.6	21.4
55–59	78	6.3	8.4
60–64	53	4.3	5.7
65 and over	29	2.4	3.4
Total	1233	100.0	100.0

Note: All data are expressed in original terms. Estimates of the number of employees are rounded.

Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

Table 3.3: Composition of employed persons by subdivision, November 2012

Subdivision	Total employment		Percentage of total subdivision employment							
	No. ('000s)	%	Male		Female		Total		Total	
			FT	PT	FT	PT	Male	Female	FT	PT
Motor vehicle and motor vehicle parts retailing	87.2	7.1	73.8	4.3	13.4	8.6	78.1	21.9	87.2	12.8
Fuel retailing	35.8	2.9	31.1	19.0	23.4	26.5	50.1	49.9	54.5	45.5
Food retailing	374.9	30.4	26.2	20.4	17.0	36.4	46.7	53.3	43.2	56.8
Other store-based retailing	664.1	53.9	24.2	10.8	26.1	38.9	35.0	65.0	50.3	49.7
Non-store retailing and retail commission-based buying and/or selling	19.2	1.6	33.5	6.6	33.6	26.3	40.1	59.9	67.1	32.9
Other Retail trade	52.0	4.2	29.9	5.0	32.5	32.6	34.9	65.1	62.4	37.6
Retail trade	1233.3	100.0	28.9	13.2	22.7	35.2	42.1	57.9	51.6	48.4
All industries	11531.1		45.7	8.5	24.9	20.9	54.2	45.8	70.6	29.4

Note: All data are expressed in original terms. Other Retail trade consists of all remaining employed persons who are not classified within a defined Retail trade subdivision. FT = full-time, PT = part-time.

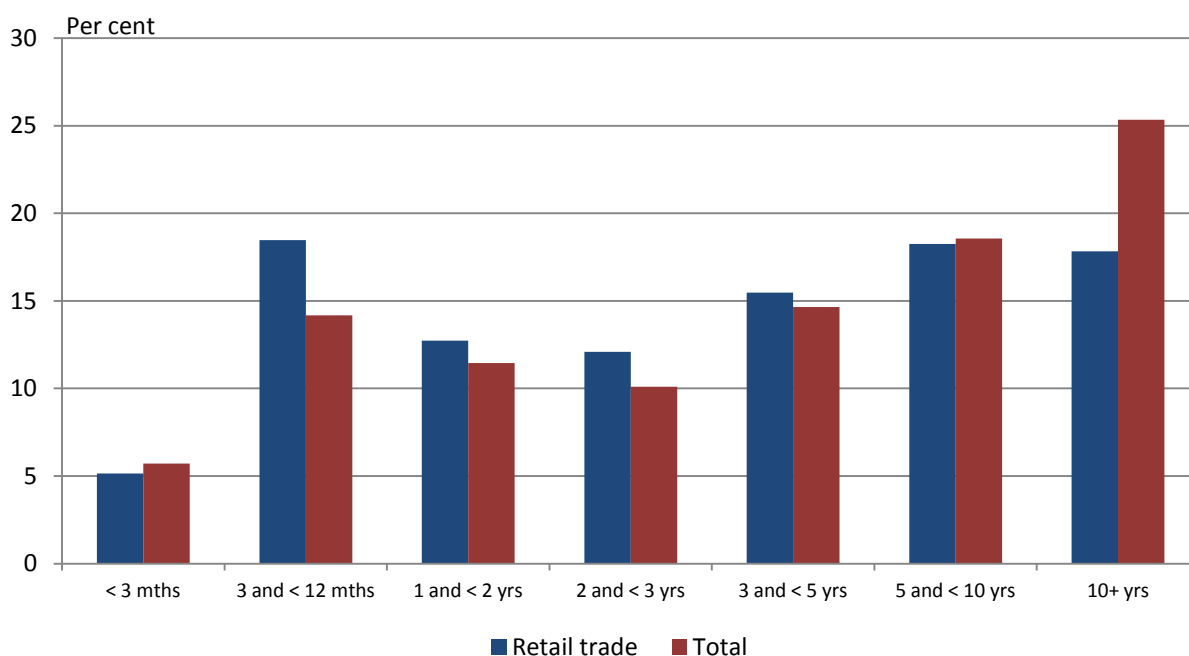
Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

Table 3.4: Employed persons by major occupational group, November 2012

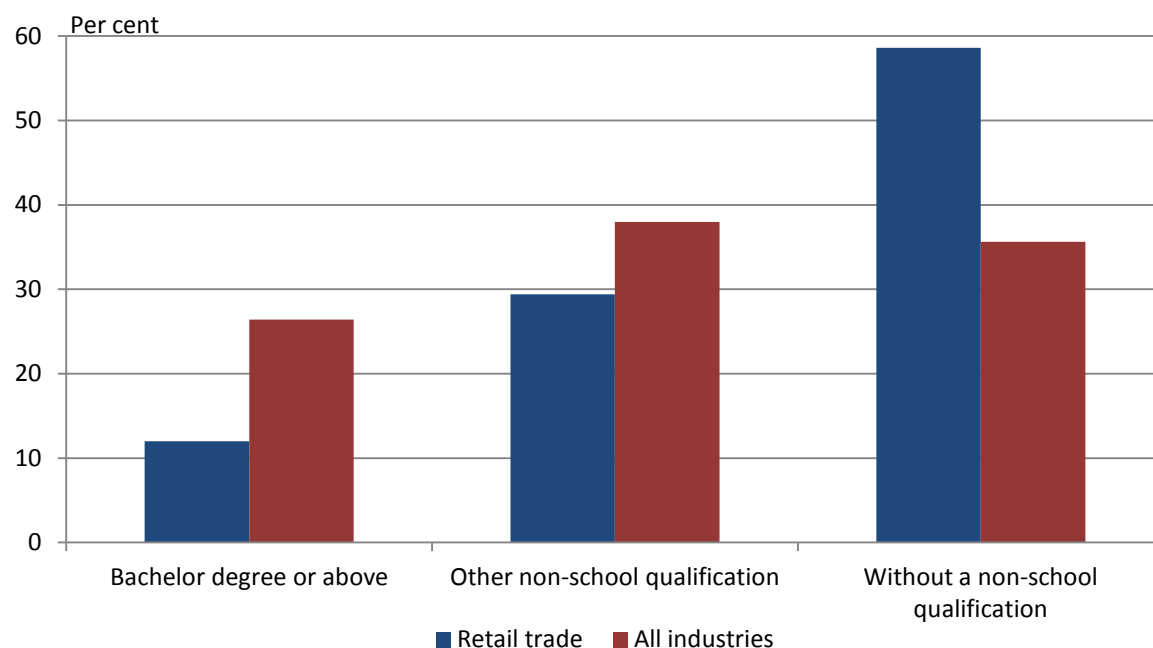
	Retail trade		All industries
	No. ('000s)	Percentage of employment in occupation	Percentage of total employment in occupation
Managers	215	17.4	12.5
Professionals	55	4.5	22.1
Technicians and trade workers	75	6.1	14.6
Community and personal service workers	4	0.3	9.7
Clerical and administrative workers	88	7.1	14.6
Sales workers	657	53.3	9.4
Machinery operators and drivers	35	2.8	6.8
Labourers	103	8.4	10.1
Total	1233	100.0	100.0

Note: All data are expressed in original terms. Estimates of the number of employees are rounded.

Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

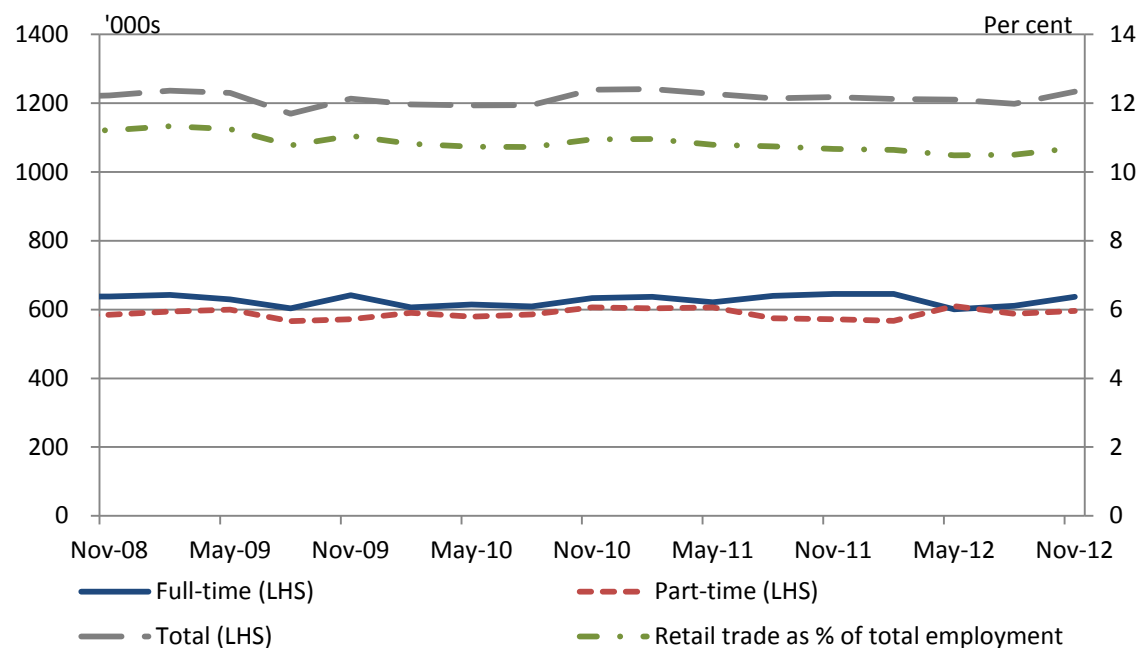
Figure 3.1: Duration of employment with current employer/business in Retail trade, February 2012

Source: ABS, *Labour Mobility, Australia, Feb 2012*, Catalogue No. 6209.0.

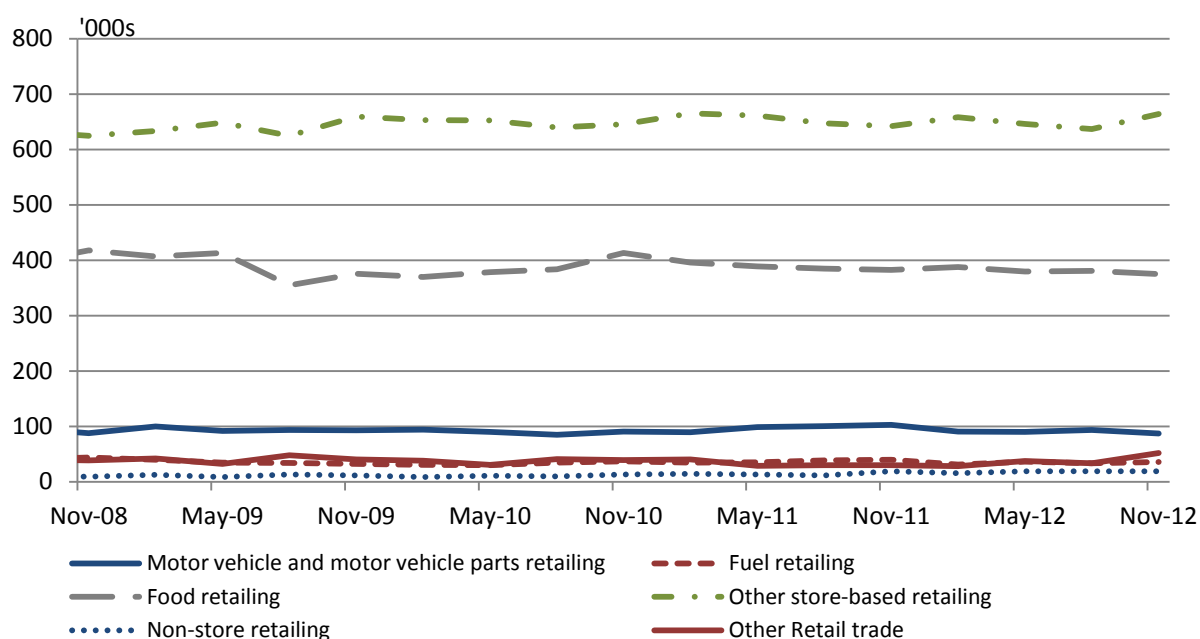
Figure 3.2: Employed persons by level of educational attainment, May 2012

Source: ABS, *Education and Work, Australia, May 2012*, Catalogue No. 6227.0.

3.2 Labour market trends

Figure 3.3: Persons employed in Retail trade and Retail trade employment as a proportion of total employment, November 2008 to November 2012

Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

Figure 3.4: Persons employed in Retail trade by subdivision, November 2008 to November 2012

Note: All data are expressed in original terms. Other Retail trade consists of all remaining employed persons who are not allocated to a Retail trade subdivision.

Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

Table 3.5: Persons previously employed in Retail trade, November 2012

	Retail trade		All industries
	No.	Percentage of industry previously employed	Percentage of total previously employed
	('000s)	%	%
Male	20.3	42.2	58.4
Female	27.8	57.8	41.6
Total	48.1	100.0	100.0

Note: All data are expressed in original terms. Persons previously employed cover unemployed persons who had worked for two weeks or more in the last two years in the industry.

Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

Table 3.6: Persons underemployed in Retail trade, November 2012

	Retail trade		All industries
	No.	Percentage of industry underemployed	Percentage of total underemployed
	('000s)	%	%
Male	49.9	27.9	39.8
Female	129.0	72.1	60.2
Total	178.9	100.0	100.0

Note: All data are expressed in original terms.

Source: ABS, *Labour Force, Australia, Detailed, Quarterly, Nov 2012*, Catalogue No. 6291.0.55.003.

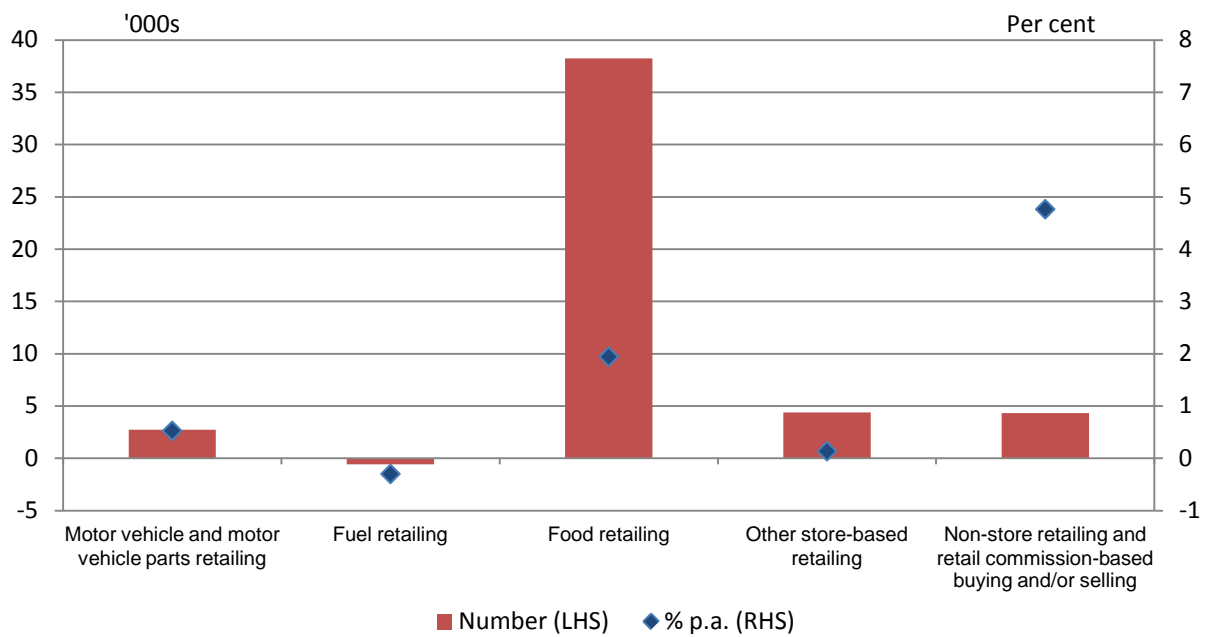
Table 3.7: Average annual growth rates of labour and multifactor productivity, 2003–04 to 2011–12

	Retail trade		Total market sector	
	Labour productivity	Multifactor productivity	Labour productivity	Multifactor productivity
	%	%	%	%
2003–04 to 2007–08	1.3	0.1	1.1	–0.6
2007–08 to 2011–12	2.7	1.8	1.6	–0.6

Note: The 2007–08 to 2011–12 growth cycle is incomplete. Labour productivity measures the amount of output per unit of labour which is measured in terms of gross value added per hour worked. Multifactor productivity measures the ratio of growth in output to growth in two or more factor inputs and represents that part of the change in output that cannot be explained by changes in the inputs. Multifactor productivity, in this case, is based on the gross value added of capital and labour in production. The total market sector comprises all industries except for Public administration and safety, Education and training and Health care and social assistance.

Source: ABS, *Estimates of Industry Multifactor Productivity, 2011–12*, Catalogue No. 5260.0.55.002.

Figure 3.5: Projected employment growth in Retail trade by subdivision, five years to 2016–17



Source: DEEWR, *Employment Projections by Industry, Occupation and Regions, 2012*,
<http://www.deewr.gov.au/LMIP/default.aspx?LMIP/Publications/IndustryEmploymentProjections>.

4 Earnings and wage instruments

4.1 Earnings

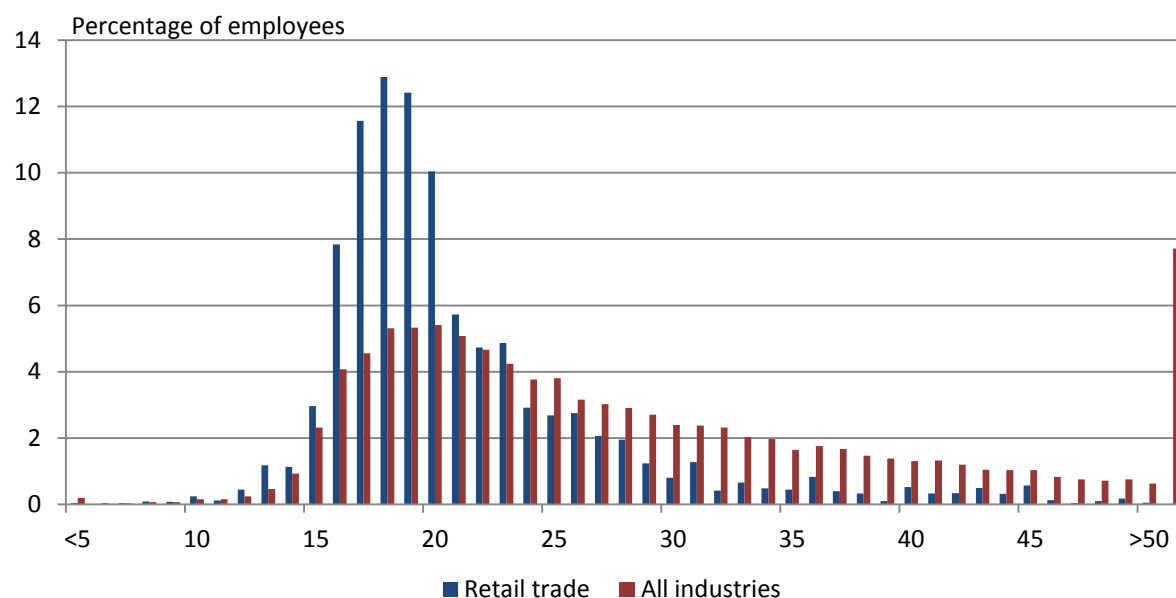
Table 4.1: Average weekly earnings, November 2012

	Retail trade	All industries	Ratio of Retail trade relative to all industries
	\$	\$	%
Average weekly earnings, all employees	647.10	1081.30	59.8
Average weekly ordinary time earnings, full-time adult employees	1008.30	1396.00	72.2
Average weekly ordinary time earnings, full-time adult male employees	1048.30	1491.80	70.3
Average weekly ordinary time earnings, full-time adult female employees	947.70	1230.10	77.0

Note: All data are expressed in original terms.

Source: ABS, *Average Weekly Earnings, Australia, Nov 2012*, Catalogue No. 6302.0.

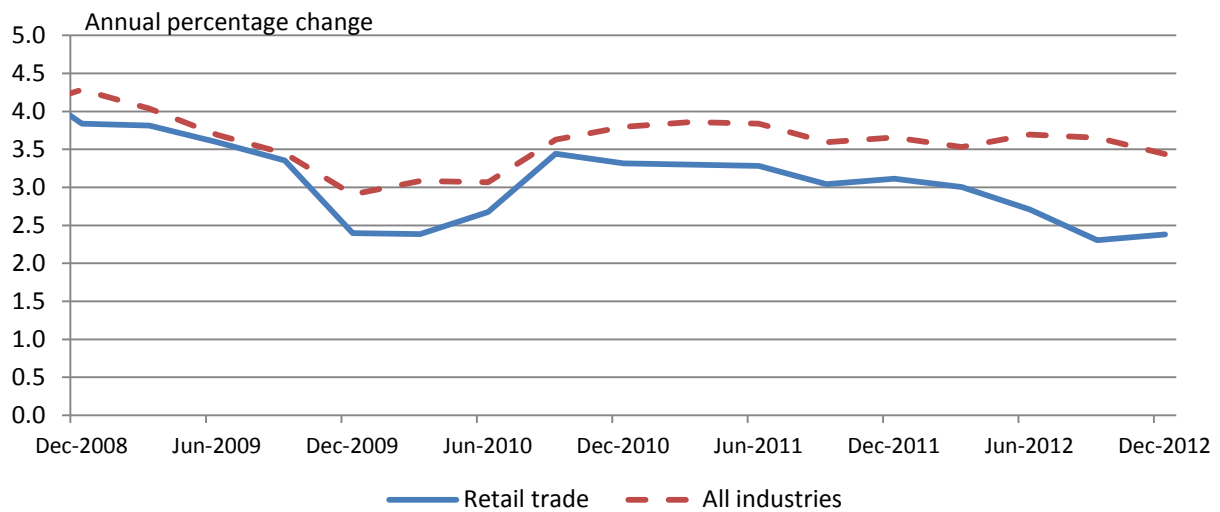
Figure 4.1: Distribution of hourly total cash earnings (\$1 intervals), adult employees, May 2010



Note: Earnings are presented using \$1 intervals (e.g. \$15 includes amounts over \$14 per hour and equal to or less than \$15 per hour).

Source: ABS, *Employee, Earnings and Hours, Expanded CURF, May 2010*, Catalogue No. 6306.0.55.001.

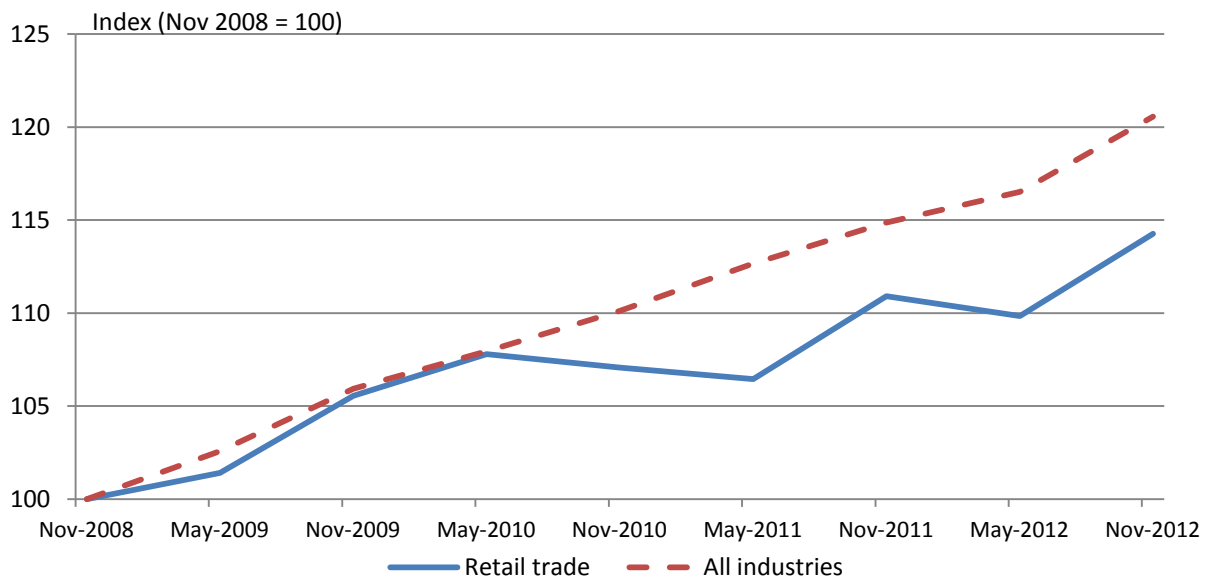
Figure 4.2: Rate of growth in total hourly rates of pay excluding bonuses, December 2008 to December 2012



Note: All data are expressed in original terms.

Source: ABS, *Wage Price Index, Australia, Dec 2012*, Catalogue No. 6345.0.

Figure 4.3: Average weekly ordinary time earnings of full-time adult employees, November 2008 to November 2012



Note: All data are expressed in original terms.

Source: ABS, *Average Weekly Earnings, Australia, Nov 2012*, Catalogue No. 6302.0.

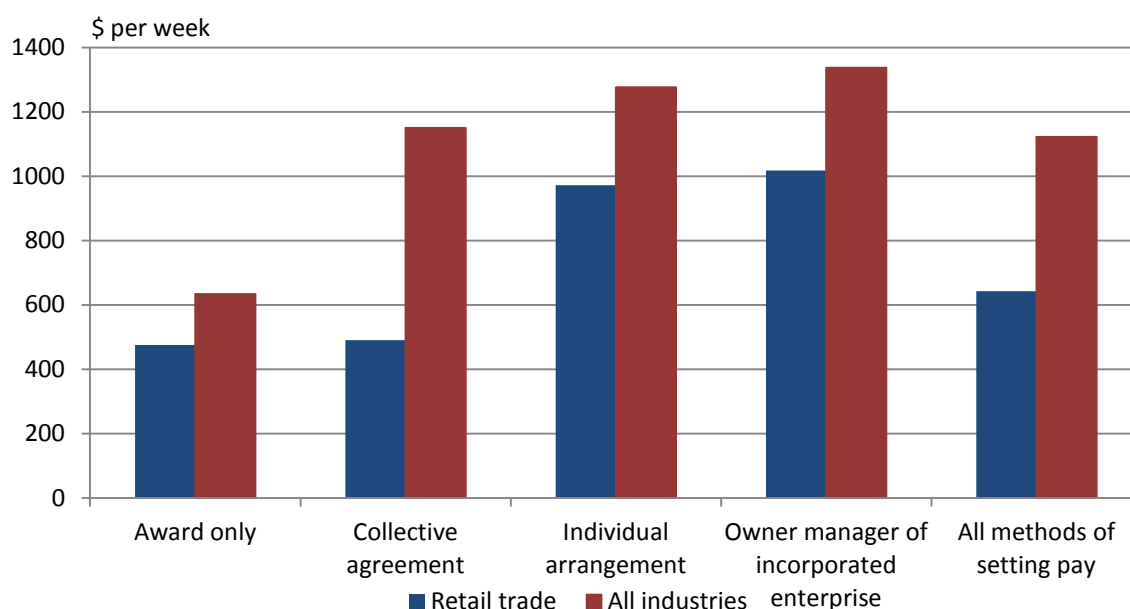
4.2 Wage instruments and bargaining

Table 4.2: Method of setting pay, May 2012

	Retail trade	All industries
	%	%
Award only	25.6	16.1
Collective agreement	42.1	42.0
Individual arrangement	29.8	38.7
Owner manager of incorporated enterprise	2.5	3.3
All methods of setting pay	100.0	100.0

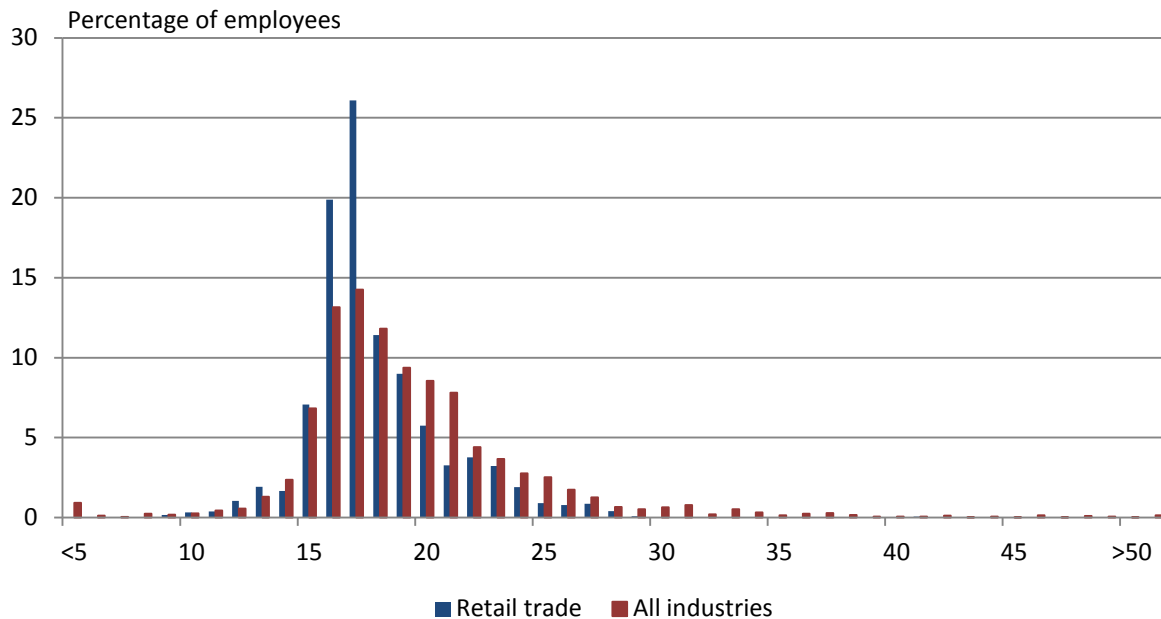
Source: ABS, *Employee Earnings and Hours, Australia, May 2012*, Catalogue No. 6306.0.

Figure 4.4: Average weekly total cash earnings by method of setting pay, May 2012



Source: ABS, *Employee Earnings and Hours, Australia, May 2012*, Catalogue No. 6306.0.

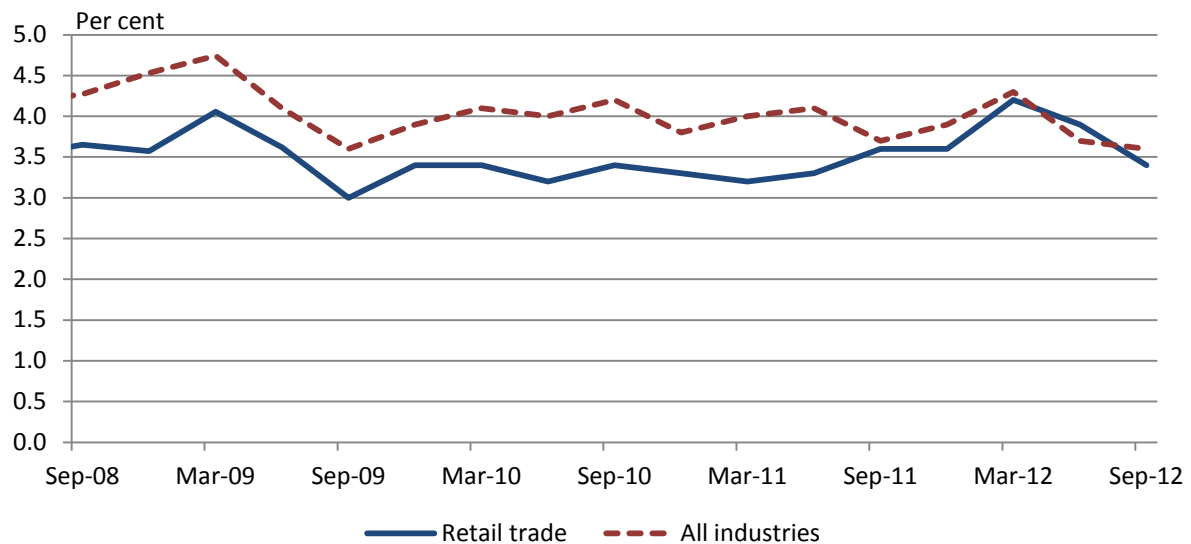
Figure 4.5: Distribution of hourly total cash earnings (\$1 intervals) for award-reliant adult employees, May 2010



Note: Earnings are presented using \$1 intervals (e.g. \$15 includes amounts over \$14 per hour and equal to or less than \$15 per hour).

Source: ABS, *Employee, Earnings and Hours, Expanded CURF, May 2010*, Catalogue No. 6306.0.55.001.

Figure 4.6: Average annualised wage increases for federal enterprise agreements certified in the quarter, September 2008 to September 2012



Source: Department of Education, Employment and Workplace Relations, *Trends in Federal Enterprise Bargaining*, September 2012, <http://foi.deewr.gov.au/node/30419>.

5 Forms and conditions of employment

Table 5.1: Employment type by gender, November 2011

	Retail trade			All industries		
	Men	Women	Persons	Men	Women	Persons
	%	%	%	%	%	%
Employees with paid leave entitlements	57.0	49.0	52.4	61.7	63.4	62.5
Employees without paid leave entitlements	27.4	40.4	34.8	16.6	23.8	19.9
OMIE	7.6	3.9	5.5	9.1	4.3	6.9
OMUE	8.0	6.6	7.2	12.6	8.5	10.7
Total	100.0	100.0	100.0	100.0	100.0	100.0

Note: OMIE = owner-manager of incorporated enterprise. OMUE = owner-manager of unincorporated enterprise. All data are expressed in original terms.

Source: ABS, *Australian Labour Market Statistics, Jul 2012*, Catalogue No. 6105.0.

Table 5.2: Forms of employment by gender, November 2011

	Retail trade			All industries		
	Men	Women	Persons	Men	Women	Persons
	%	%	%	%	%	%
Employees	83.8	89.4	87.0	77.6	86.9	81.8
Independent contractors	4.1	2.6	3.2	12.0	5.4	9.0
Other business operators	12.2	8.0	9.8	10.4	7.7	9.2
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS, *Forms of Employment, Australia, Nov 2011*, Catalogue No. 6359.0.

Table 5.3: Employees with and without paid leave, November 2011

	Full-time		Part-time		All employees	
	With paid leave	Without paid leave	With paid leave	Without paid leave	With paid leave	Without paid leave
	%	%	%	%	%	%
Retail trade	90.2	9.8	32.1	67.9	60.4	39.6
All industries	89.5	10.5	46.4	53.6	76.3	23.7

Source: ABS, *Forms of Employment, Australia, Nov 2011*, Catalogue No. 6359.0.

6 References

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