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Unfair Burden

The Impact of Sunday Penalty Rate Reductions on Regional and Rural Australia

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Background

This report builds on previous reports by The Mckell Institute on penalty rates and industrial relations, including:

- *Who loses when penalty rates are cut?* (2015)
- *The economic impact of penalty rate cuts on rural NSW* (2015)
- *The economic impact of penalty rate cuts on metropolitan Brisbane* (2015)
- *The importance of penalty rates for our health workforce* (2016)
- *The impact of the FWC's February 23 Sunday Penalty Rates Decision* (2017)

Further Mckell Institute research into penalty rates and industrial relations can be found at www.mckellinstitute.org.au/policy-areas/industrial-relations/

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Note

The opinions in this paper are those of the authors and do not necessarily represent the views of the Mckell Institute's members, affiliates, individual board members or research committee members. Any remaining errors or omissions are the responsibility of the authors.



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Executive Summary

Penalty rates are a mainstay of the Australian economy, having been central to workplace arrangements since the earliest days of Australia's federation. Penalty rates provide compensation to Australians for working unsociable hours, and ensuring that workers on lower incomes can attain a reasonable standard of living.

On February 23 2017, the Fair Work Commission (FWC), the body that adjudicates on the rate of pay in awards, determined that Sunday penalty rates will be reduced for workers in hospitality, retail, fast food and pharmacy. Earlier Mckell Institute research identified that almost 700,000 Australians are directly reliant on the Awards affected by the Commission decision. While not all of these individuals work every affected weekend shift, this figure demonstrates the scale of the change proposed by the Fair Work Commission.

Additionally, previous research by The Mckell Institute has demonstrated three ways that rural and regional Australia, in particular, will be negatively impacted by a reduction in penalty rates¹. Firstly, there are a higher proportion of retail and hospitality workers in rural and regional Australia than in Australia's cities. Secondly, those workers earn less than their urban counterparts. And finally, where workers are employed by firms that are not locally owned, any cuts to their pay are likely to be taken out of the electorate (usually to Sydney or Melbourne).

This report updates that earlier work, by modeling the impact of the FWC's February 23 decision on regional and rural Australia. It finds that across regional and rural Australia, all affected workers stand to lose nearly \$667 million a year in take home pay. The communities in which those workers live are set to also lose at least \$289.5 million per year as non-locally owned businesses shift the savings from labour costs elsewhere. This will hurt small and locally owned businesses, and will slow job growth in regions that are in many cases already struggling with higher unemployment than elsewhere in the country.

This report then identifies the aggregate reduction of disposable income in each rural and regional electorate across Australia, finding that Leichardt in Queensland is set to lose the most, with a reduction of up to \$21 million in disposable income across the electorate, followed by McEwen in Victoria (approximately \$19.2 million) and Dawson in Queensland (approximately \$19 million).

Introduction

The February 23 decision by the Fair Work Commission (FWC) to reduce the Sunday rates of pay for workers in the hospitality, retail, pharmacy and fast-food sectors will reduce disposable income and living standards nationwide, with a particularly significant impact on workers and economies across regional and rural Australia.

The scale of these changes on the individual and on regional economies are not to be understated. The proposed changes will see, in some circumstances, employees losing close to \$100 a week, with some who work a 40-hour week that includes an 8-hour shift on Sunday to lose between 4.3% - 8.1% in wages annually. Collectively, workers in some regional electorates stand to lose up to \$21 million in disposable income.

This report looks at detail into the impacts of the cut in Sunday penalty rates to workers primarily employed in the retail and hospitality sectors, taking a broader approach towards the pharmacy and fast food sector in rural and regional Australia. It finds that workers across these communities collectively stand to lose \$667 million in disposable income, with the regional and rural economies themselves subject to lose approximately \$289.5 million as businesses shift money previously allocated to labour costs within these regions into other jurisdictions.

The retail and hospitality industries employ close to 20% of the working population in regional and rural Australia, suggesting that any changes to the take home pay of such a large swathe of the regional and rural workforce will have a significant impact on these local economiesⁱⁱ. The data shows that around quarter of a million people will be impacted negatively solely by the Sunday rate cuts and this will concurrently affect the local economies as a result of large declines in spending, and a drop in the standards of living in these communities. Additionally, a higher proportion of the rural and regional workforce is employed in retail and hospitality

when compared with the urban workforce, meaning that rural and regional communities are disproportionately impacted by the proposed changes.

This report's findings reinforce the notion that penalty rate pay is central to the livelihoods of significant portions of the Australian workforce, and is vitally important to local economies around the country. While many proponents of a reduction in penalty rate pay claim the changes will simply create more employment overnight, the reality is that a large number of regional and rural workers subject to a reduction in their pay are employed in firms owned by businesses based outside of their own community. This means that any savings that these business owners will make from the cut in Sunday penalty rates may not feed back into the local economy. Combined with the fact that a reduction in penalty rates will reduce the amount affected workers can spend at local businesses, this report notes that the changes in Sunday penalty rates will have a negative impact on job creation in regional and rural Australia, not a positive one.

Key Findings

- 1. Regional and rural Australian workers will lose \$667 million in disposable income, with at least \$289.5 million shifting out of regional and rural Australia.**

This report calculates that nation-wide, workers in rural and regional communities will be subject to an \$667 million loss in disposable income as a result of the Fair Work Commission's February 23 decision to reduce Sunday rates. Additionally, this report estimates that at least \$289.5 million will be removed from regional and rural Australia as a consequence businesses shifting money previously allocated for labour costs in regional and rural communities into other jurisdictions.

- 2. The local economies in the electorates of McEwen and Leichardt will be hit the hardest by changes in the retail sector**

In assessing the impact on employees in the retail sector, the federal seat of McEwen in Victoria will be affected the most by the decision with 4228 workers being impacted with an electorate-wide aggregate of \$13,849,177 per annum being lost in disposable income just amongst retail workers. Similarly, the seat of Leichardt in Queensland has 3859 retail workers set to lose \$12,639,482.6 p.a.

- 3. Even the least-impacted electorates still stand to lose between \$5-7 million in disposable income from changes in the retail sector alone.**

Lingiari, Northern Territory that employs 1571 workers in the retail sector will experience a loss of \$5,145,760.3 p.a. which is the lowest estimate so far followed by Braddon, Tasmania that employs 2009 workers in the retail industry and stands to lose \$6,578,853 in disposable income per year.

4. The economies in the electorates of Leichardt and Dawson will be most adversely impacted by changes to hospitality awards

For the hospitality industry, Leichardt, Queensland will be most adversely impacted as it employs 4835 workers in this industry and the estimated loss in income annually is \$7,029,917 Dawson, Queensland, would also be significantly impacted, losing \$5,460,873 in disposable income while employing approximately 3662 workers. The regions that will be impacted the least would be Lingiari, Northern Territory facing a disposable income loss of \$2,388,450 in its hospitality industry that employs 1602 workers and Franklin, Tasmania which employs 1609 workers and stands to lose \$2,399,364 in disposable income per year.

5. When assessing the changes to award rates in all affected industries, certain electorates stand to lose up to \$21 million in disposable income.

Overall, the electorate that will be affected the most across all the 4 sectors will be Leichardt, Queensland which employs over 9348 workers and will suffer a loss of, at minimum, \$21,062,030.7 per annum in disposable income from workers employed both in local and non-local firms. The loss to the local economy from workers employed in firms owned non-locally in the retail and hospitality sectors will be felt most by McEwen which will be drained by \$12,467,058.6 in disposable income per year. The electorate which will be affected the least by the cut in penalty rates across all four industries will be Lingiari which employs over 3439 workers and will be impacted by a \$8,027,894 loss in disposable income per year.

6. The proposed changes to Sunday penalty rates disproportionately impact full time and part time workers, incentivising a greater shift towards casual employment

The calculations in this report are for workers who are Award-reliant and do not take into account potential future losses to income for EBA-reliant workers, meaning that the losses estimated in this report are conservative. Certain employers have already suggested they will factor in the FWC's proposed Sunday rates reduction into future Enterprise Bargaining negotiationsⁱⁱⁱ, suggesting that an additional 700,000 workers in the affected industries are at risk of a pay cut, further hurting the living standards and local economies of regional and rural Australia.

Part 1 – The Importance of Penalty Rates for Regional and Rural Communities

Penalty Rates Are Vital for Regional and Rural Economies

While penalty rate cuts will negatively affect workers across Australia, those in rural and regional Australia will feel the cuts the hardest. The retail and hospitality sectors employ 18 per cent of all people living in regional and rural Australia. This equates to around half a million workers across the country. In non-rural areas, around 17 per cent of the Australian workforce are employed across these two sectors. Regional workers are also significantly more likely to receive a lower overall annual income than their urban counterparts. Data from the 2011 Census demonstrates that across the retail industry, rural and regional Australians earn around 7 per cent less than their urban counterparts, with rural retail workers averaging around \$32,000 per annum, and urban retail workers averaging around \$34,500 annually. This gap was less significant for hospitality workers, who earn around \$200 less per annum in rural Australia than those who work in urban centers. While data is predominately drawn from the 2011 census, the endemic slow wage growth in Australia over the previous few years would suggest that the income figures ascertained from the 2011 data have not significantly changed, although a more thorough contemporary analysis on the incomes amongst workers in these industries will be possible upon the release of the 2017 census data.

The Political Debate Has Shifted in Recent Years

The Mckell Institute's 2015 report *Who Loses When Penalty Rates Are Cut?* outlined the political climate around penalty rates policy, arguing that there were numerous influential opponents of penalty rates throughout the Government, as well as in major peak bodies for business. The election of the Coalition Federal Government in September 2013 coincided with a renewed push by these stakeholders to create a climate in which future penalty rates reduction would be adopted. A common theme amongst the proponents of altering penalty

rate legislation is that the concept of ‘unsociable’ hours is no longer relevant to modern Australia. Building on this theme, proponents of reducing penalty rates have consistently argued for their reduction throughout the first two terms of the incumbent government.

These arguments consistently fail to adequately outline the negative impact on the economy that implementing a significant reduction in take home pay for workers would create. While those advocating for a reduction in penalty rates did so largely on ideological and theoretical grounds, proponents for a continuation of existing penalty rate legislation have been primarily concerned with the practical, on the ground realities of those living week-to-week on lower incomes that are disproportionately reliant upon penalty rates.

In February 2017, the Fair Work Commission – the body responsible for determining minimum rates of pay across the economy – ruled in favour of reducing Sunday penalty rates for workers across the hospitality, retail, fast food and pharmacy industries. Figure 1.1 outlines the scale of the reductions, which disproportionately impact full time and part time employees as opposed to their casual counterparts. Part 2 of this report explores in detail the extent to which the proposed changes reduce the disposable incomes of workers across regional and rural Australia.

Award	Full and part time	Casual
Retail	200 % down to 150 %	200 % down to 175 %
Hospitality	175 % down to 150 %	No change
Fast-food	150 % down to 125 %	175 % to 150 %
Pharmacy*	200 % down to 150 %	200 % to 175 %

Figure 1.1 - Proposed Sunday penalty rate reductions as released by the Fair Work Commission, February 23, 2016.

<i>Estimated Total Impacted by Sunday Penalty Rate Decision</i>		<i>Female</i>
Retail	304,974	177,800
Hospitality	361,074	185,230
Fast Food	15,330	7864.29
Total	681,378	370,894
Total Female	370,874	54.43 (%)

Figure 1.2 Estimated total employees nationwide currently working on awards subject to change
 Source: The Mckell Institute, 2017; Fair Work Commission, 2017.

Regional Australia Will Be Worse Off Under the Proposed Fair Work Commission Changes

The changes as proposed by the Fair Work Commission will significantly impact economies across regional and rural Australia. This report estimates that approximately \$667 million per annum in disposable income will be lost to rural and regional communities. By reducing the disposable income of non-urban Australians, demand for local goods and services will in turn be reduced. Despite the claims of penalty rate opponents that simply reducing penalty rates will increase employment, the scale of the reduction to disposable incomes across Australia and particularly in regional areas suggests the opposite will occur. Fewer rural and regional Australians will be able to afford goods and services within their communities. This fall in demand will negatively impact job creation. Simply, employers are unlikely to employ more workers if there is no more work to be done, no more products to be sold, and no more services to provide. To create regional and rural employment, demand also needs to be fostered. By removing \$667 million in disposable income across regional and rural Australia, the Fair Work Commission’s decision will have a significantly adverse impact on rural and regional economies nationally.

The FWC Decision Encourages Insecure Employment Across Rural Australia

Among the more perverse and under-examined impacts of the February 23 decision by the Fair Work Commission is the way in which it incentivises the transition from full time, secure employment to casual and insecure employment. The FWC's decision impacted predominately full time or part time workers, but had a less significant impact on casual rates. This was particularly evident in the hospitality sector, where casual workers received no reduction in Sunday penalty rates, whereas their full time and part time colleagues' award was reduced from 175% to 150%. Casual workers are already reimbursed at a higher hourly rate as a trade off for receiving fewer workplace entitlements, such as annual leave and sick leave. However, with the gap in casual and full time employees' hourly rates set to expand even more dramatically, it is probable that many employees already struggling to make ends meet on lower incomes in the affected sectors will be encouraged to transition into marginally higher paying but less secure casual employment. For some, casual employment is a favourable option. But for many, casual employment means sacrificing annual leave and paid sick leave simply as a way to achieve a higher base rate of pay. Job insecurity is a major contributor to stress in the workplace and in the community, and will likely increase throughout regional and rural Australia as a direct result of the decision by the Fair Work Commission to reduce Sunday rates on February 23.

Part 2 – The Economic Impact on Regional and Rural Communities

The following analysis determines the number of individuals affected by the February 23 penalty rates decision across regional and rural Australia by state and electorate. It estimates the aggregate loss in disposable income throughout these jurisdictions as a direct result of the February 23 Fair Work Commission ruling. It also estimates the amount of money shifting from regional and rural Australia into other jurisdictions.

Assumptions and Methodology

Data Sources

The data for the calculations were obtained from the ABS Census of Population and Housing 2011 – in particular the workforce data specific to industry, Federal Electorate of residence and income.

The Australian Bureau of Statistics Counts of Australian Businesses, including Entries and Exits, June 2009 -2013 (ABS Cat No. 8165.0, Table 7) was used to obtain data for the Statistical Area 2 (SA2) (ABS geographical classification level) and was then reclassified by Federal Electorate.

The study has been conducted using Federal electorates as its geographic unit and includes the rural electorates as classified by the Australian Electoral Commission plus all Federal electorates in Tasmania and Northern Territory.

The number of workers employed in each industry are award-reliant workers for each sector. The wage rates for Sunday have been taken from the FWC's current awards and minimum wage rates for each industry 2017 and depict conservative estimate.

Methodology

For Retail and Hospitality:

1. Use 2011 census to estimate retail and hospitality worker numbers in each Federal Electorate.
2. Apply estimate of the number of workers who actually work weekends.
3. Apply the reduction in Sunday Penalty Rates and assume 19% Marginal Tax rate to estimate disposable income lost per worker.
4. Use the total number of workers in each industry to estimate total disposable income lost annually.
5. Use ABS Counts of Australian Businesses to estimate number of employees by business size in each Federal Electorate.
6. Assume that most of the larger businesses are not owned locally (as it is clear that most medium to large employers in rural outlets are retail chains owned outside of the local area) and obtain low estimates.
7. Derive the number of employees in each electorate that are employed by non-local businesses (use 4 and 5).
8. Use 6 to estimate income lost to the local economy from the businesses that are non-locally owned.

For Pharmacy and Fast Food:

1. Use total number of Australians working in these 2 industries as of Dec 2016 and apply estimate of the number of workers who actually work weekends.
2. Derive proportional estimates of the number of regional workers for each industry based on the proportions obtained for the retail industry from the ABS census.

3. Apply the reduction in Sunday Penalty Rates and assume 19% Marginal Tax rate to estimate disposable income lost per worker.
4. Use the total number of workers in each industry to estimate total disposable income lost annually.

Assumptions

1. A marginal tax rate of 19 percent has been used to estimate the average loss in disposable income per worker. This figure is used given that the average income per worker in each sector usually falls in the \$18,201-\$37,000 tax bracket.
2. The number of workers in each industry by electorate, that are employed by non-locally owned firms, are conservative estimates. It is assumed that for business that employ between 1-4 workers, 0% are non-local owners, for businesses employing between 5-19 workers, 12 is the average number of workers per firm and 10% of these are owned non-locally. For firms employing between 20-199 workers, 40 is the average number of workers per firm and 75% are owned non-locally. Additionally, it is assumed that all businesses with 200 or more employees are not locally owned.
3. All figures are conservative (minimum) estimates. This is critical given that the cut in penalty rates for public holidays is not considered in the calculations.
4. All \$ figures rounded to 1 d.p and 'Number of Workers' to 0 d.p
5. Proportion of workers who actually work weekends:
 - Retail: 46.4%
 - Hospitality: 61%.
 - Pharmacy: 42.1%
 - Fast Food: 59.9%

Results by State

State	Number of workers who work on Sundays				Total loss in disposable income per year	Total income leaving regional & rural areas (Retail+Hosp)
	Retail	Hospitality	Fast Food	Pharmacy		
New South Wales	43,238	38,040	6361	968	\$212,660,832.20	\$91,121,484.80
Queensland	29,635	26,765	4,361	664	\$146,281,155.80	\$63,993,364.70
Victoria	26,125	19,291	3,844	586	\$122,544,345.70	\$56,596,349.70
South Australia	13,573	9,951	1,996	304	\$63,553,714.60	\$30,463,250.50
Western Australia	9479	8,410	1,394	212	\$46,565,594.00	\$14,273,968.90
Northern Territory	3730	3,694	549	83	\$18,898,934.30	\$7,813,744.10
Tasmania	11,650	9,957	1713	262	\$56,661,659.70	\$25,320,434.30
Total	137,430	116,108	20,218	3,079	\$667,166,236.30	\$289,582,597.00

Results by Regional and Rural Electorate

Barker SA	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3542	38.88	29.16	77.76	1711	5,604,258.80	11,599,996.50
Hospitality	2605	30.975	26.55	35.40	750	1,117,551.00	3,884,642.30
Pharmacy	79	38.88	29.16	77.76	-	-	259,719.40
Fast Food	521	29.16	24.30	38.88	-	-	853,182.70
Total	6,747						16,597,540.90

Bass TAS	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	2482	38.88	29.16	77.76	1092	3,575,133.20	8,128,963.90
Hospitality	2084	30.975	26.55	35.40	647	964,475.00	3,106,986.20
Pharmacy	56	38.88	29.16	77.76	-	-	182,004.30
Fast Food	365	29.16	24.30	38.88	-	-	597,887.40
Total	4,987						12,015,841.80

Braddon TAS	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2009	38.88	29.16	77.76	680	2,228,208.40	6,578,853.00
Hospitality	1815	30.975	26.55	35.40	705	1,051,064.00	2,705,879.40
Pharmacy	45	38.88	29.16	77.76	-	-	147,297.90
Fast Food	295	29.16	24.30	38.88	-	-	483,876.30
Total	4,164						9,915,906.60

Calare NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3100	38.88	29.16	77.76	1671	5,473,259.20	10,154,746.00
Hospitality	2588	30.975	26.55	35.40	1116	1,663,911.00	3,859,175.20
Pharmacy	69	38.88	29.16	77.76	-	-	227,360.80
Fast Food	456	29.16	24.30	38.88	-	-	746,884.20
Total	6,213						14,988,166.20

Cowper NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3120	38.88	29.16	77.76	1711	5,603,195.00	10,220,093.80
Hospitality	2908	30.975	26.55	35.40	971	1,447,987.00	4,335,773.80
Pharmacy	70	38.88	29.16	77.76	-	-	228,823.90
Fast Food	459	29.16	24.30	38.88	-	-	751,690.50
Total	6,557						15,536,382.00

Dawson QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3690	38.88	29.16	77.76	1819	5,958,048.80	12,084,786.10
Hospitality	3662	30.975	26.55	35.40	1732	2,582,000.00	5,460,873.80
Pharmacy	83	38.88	29.16	77.76	-	-	270,573.60
Fast Food	543	29.16	24.30	38.88	-	-	888,839.10
Total	7,978						18,705,072.60

Denison TAS	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2363	38.88	29.16	77.76	844	2,764,668.40	7,738,396.70
Hospitality	2365	30.975	26.55	35.40	372	554,364.00	3,526,283.80
Pharmacy	53	38.88	29.16	77.76	-	-	173,259.70
Fast Food	348	29.16	24.30	38.88	-	-	569,161.10
Total	5,129						12,007,101.30

Durack WA	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2909	38.88	29.16	77.76	912	2,988,370.60	9,527,103.10
Hospitality	3174	30.975	26.55	35.40	1232	1,837,178.00	4,733,242.40
Pharmacy	65	38.88	29.16	77.76	-	-	213,308.10
Fast Food	428	29.16	24.30	38.88	-	-	700,720.90
Total	6,576						15,174,374.50

Eden-Monaro NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3171	38.88	29.16	77.76	1608	5,267,337.60	10,384,223.20
Hospitality	3332	30.975	26.55	35.40	839	1,251,708.00	4,967,903.60
Pharmacy	71	38.88	29.16	77.76	-	-	232,498.70
Fast Food	466	29.16	24.30	38.88	-	-	763,762.30
Total	7,040						16,348,387.80

Fairfax QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3398	38.88	29.16	77.76	1440	4,715,072.60	11,130,404.10
Hospitality	3079	30.975	26.55	35.40	1060	1,581,234.00	4,590,444.80
Pharmacy	76	38.88	29.16	77.76	-	-	249,205.40
Fast Food	500	29.16	24.30	38.88	-	-	818,644.10
Total	7,053						16,788,698.40

Farrer NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3056	38.88	29.16	77.76	1548	5,071,142.20	10,010,373.00
Hospitality	2895	30.975	26.55	35.40	1033	1,540,760.00	4,316,673.40
Pharmacy	68	38.88	29.16	77.76	-	-	224,128.30
Fast Food	450	29.16	24.30	38.88	-	-	736,265.50
Total	6,469						15,287,440.20

Fisher QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3254	38.88	29.16	77.76	1962	6,427,337.20	10,659,291.90
Hospitality	2797	30.975	26.55	35.40	1559	2,324,510.00	4,170,237.60
Pharmacy	73	38.88	29.16	77.76	-	-	238,657.30
Fast Food	479	29.16	24.30	38.88	-	-	783,993.70
Total	6,603						15,852,180.50

Flinders VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3422	38.88	29.16	77.76	2255	7,384,150.80	11,207,909.60
Hospitality	2584	30.975	26.55	35.40	1141	1,701,748.00	3,852,808.40
Pharmacy	77	38.88	29.16	77.76	-	-	250,940.70
Fast Food	503	29.16	24.30	38.88	-	-	824,344.60
Total	6,586						16,136,003.30

Flynn QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2884	38.88	29.16	77.76	1590	5,209,132.40	9,445,038.40
Hospitality	2458	30.975	26.55	35.40	1173	1,749,135.00	3,664,533.80
Pharmacy	65	38.88	29.16	77.76	-	-	211,470.70
Fast Food	424	29.16	24.30	38.88	-	-	694,685.00
Total	5,831						14,015,727.90

Forrest WA	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3497	38.88	29.16	77.76	1555	5,091,658.40	11,454,103.70
Hospitality	2821	30.975	26.55	35.40	836	1,246,160.00	4,206,619.20
Pharmacy	78	38.88	29.16	77.76	-	-	256,452.90
Fast Food	514	29.16	24.30	38.88	-	-	842,452.30
Total	6,910						16,759,628.10

Franklin TAS	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2314	38.88	29.16	77.76	1625	5,320,983.60	7,580,346.20
Hospitality	1609	30.975	26.55	35.40	821	1,224,149.00	2,399,364.60
Pharmacy	52	38.88	29.16	77.76	-	-	169,721.00
Fast Food	340	29.16	24.30	38.88	-	-	557,536.40
Total	4,315						10,706,968.20

Gilmore NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2935	38.88	29.16	77.76	1189	3,892,754.00	9,612,207.20
Hospitality	2742	30.975	26.55	35.40	344	512,798.00	4,088,379.10
Pharmacy	66	38.88	29.16	77.76	-	-	215,213.50
Fast Food	432	29.16	24.30	38.88	-	-	706,980.30
Total	6,175						14,622,780.10

Gippsland VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non- locally owned	Total loss in income (local+non- local)
Retail	3249	38.88	29.16	77.76	1677	5,493,927.30	10,641,055.30
Hospitality	2485	30.975	26.55	35.40	741	1,105,454.00	3,704,553.50
Pharmacy	73	38.88	29.16	77.76	-	-	238,249.00
Fast Food	478	29.16	24.30	38.88	-	-	782,652.40
Total	6,285						15,366,510.20

Grey SA	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3019	38.88	29.16	77.76	1280	4,192,290.10	9,887,275.90
Hospitality	2618	30.975	26.55	35.40	917	1,366,856.00	3,903,742.60
Pharmacy	68	38.88	29.16	77.76	-	-	221,372.20
Fast Food	444	29.16	24.30	38.88	-	-	727,211.70
Total	6,149						14,739,602.40

Hume NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3092	38.88	29.16	77.76	1837	6,016,253.90	10,125,871.40
Hospitality	2331	30.975	26.55	35.40	965	1,438,345.00	3,475,349.60
Pharmacy	69	38.88	29.16	77.76	-	-	226,714.30
Fast Food	455	29.16	24.30	38.88	-	-	744,760.40
Total	5,947						14,572,695.70

Hunter NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non- local)
Retail	2963	38.88	29.16	77.76	1742	5,706,231.70	9,703,390.20
Hospitality	2946	30.975	26.55	35.40	1897	2,828,212.00	4,393,074.70
Pharmacy	66	38.88	29.16	77.76	-	-	217,255.10
Fast Food	436	29.16	24.30	38.88	-	-	713,686.80
Total	6,411						15,027,406.80

Indi VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non- local)
Retail	3064	38.88	29.16	77.76	1668	5,463,685.00	10,036,208.10
Hospitality	2854	30.975	26.55	35.40	744	1,108,819.00	4,254,824.80
Pharmacy	69	38.88	29.16	77.76	-	-	224,706.70
Fast Food	451	29.16	24.30	38.88	-	-	738,165.70
Total	6,438						15,253,905.30

Kennedy QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3168	38.88	29.16	77.76	1646	5,389,674.80	10,375,104.90
Hospitality	2434	30.975	26.55	35.40	1036	1,544,034.00	3,629,061.70
Pharmacy	71	38.88	29.16	77.76	-	-	232,294.50
Fast Food	466	29.16	24.30	38.88	-	-	763,091.60
Total	6,139						14,999,552.70

Leichardt QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3859	38.88	29.16	77.76	1860	6,091,024.00	12,639,482.60
Hospitality	4835	30.975	26.55	35.40	2109	3,143,913.00	7,209,917.90
Pharmacy	86	38.88	29.16	77.76	-	-	282,993.00
Fast Food	568	29.16	24.30	38.88	-	-	929,637.20
Total	9,348						21,062,030.70

Lingiari NT	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	1571	38.88	29.16	77.76	565	1,850,558.90	5,145,760.30
Hospitality	1602	30.975	26.55	35.40	845	1,259,530.00	2,388,450.20
Pharmacy	35	38.88	29.16	77.76	-	-	115,211.50
Fast Food	231	29.16	24.30	38.88	-	-	378,472.00
Total	3,439						8,027,894.00

Lyne NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	2939	38.88	29.16	77.76	1625	5,321,287.50	9,624,365.00
Hospitality	2419	30.975	26.55	35.40	977	1,456,809.00	3,607,232.80
Pharmacy	66	38.88	29.16	77.76	-	-	215,485.70
Fast Food	432	29.16	24.30	38.88	-	-	707,874.50
Total	5,856						14,154,958.00

Lyons TAS	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2482	38.88	29.16	77.76	1808	5,920,815.70	8,128,963.90
Hospitality	2084	30.975	26.55	35.40	1151	1,716,573.00	3,106,986.20
Pharmacy	56	38.88	29.16	77.76	-	-	182,004.30
Fast Food	365	29.16	24.30	38.88	-	-	597,887.40
Total	4,987						12,015,841.80

Mallee VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3037	38.88	29.16	77.76	1419	4,648,509.00	9,948,064.60
Hospitality	2004	30.975	26.55	35.4	446	664,509.00	2,987,836.50
Pharmacy	68	38.88	29.16	77.76	-	-	222,733.20
Fast Food	447	29.16	24.30	38.88	-	-	731,682.70
Total	5,556						13,890,317.00

Maranoa QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3274	38.88	29.16	77.76	1276	4,178,010.00	10,724,639.70
Hospitality	2376	30.975	26.55	35.40	778	1,159,299.00	3,542,655.50
Pharmacy	73	38.88	29.16	77.76	-	-	240,120.50
Fast Food	482	29.16	24.30	38.88	-	-	788,800.00
Total	6,205						15,296,215.70

Mayo SA	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3409	38.88	29.16	77.76	1892	6,197,514.20	11,163,837.80
Hospitality	2531	30.975	26.55	35.40	1123	1,674,917.00	3,773,678.50
Pharmacy	76	38.88	29.16	77.76	-	-	249,953.90
Fast Food	501	29.16	24.30	38.88	-	-	821,103.10
Total	6,517						16,008,573.30

McEwen VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non- local)
Retail	4228	38.88	29.16	77.76	2897	9,487,134.60	13,849,177.00
Hospitality	2722	30.975	26.55	35.40	1999	2,979,924.00	4,059,273.80
Pharmacy	95	38.88	29.16	77.76	-	-	310,077.60
Fast Food	622	29.16	24.30	38.88	-	-	1,018,610.50
Total	7,667						19,237,138.90

McMillan VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non- local)
Retail	3208	38.88	29.16	77.76	1891	6,193,908.80	10,507,320.30
Hospitality	2118	30.975	26.55	35.40	853	1,271,536.00	3,157,920.40
Pharmacy	72	38.88	29.16	77.76	-	-	235,254.80
Fast Food	472	29.16	24.30	38.88	-	-	772,816.10
Total	5,870						14,673,311.60

Murray VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non- local)
Retail	3056	38.88	29.16	77.76	1343	4,399,123.5	10,010,373.00
Hospitality	2043	30.975	26.55	35.40	494	736,272	3,046,047.10
Pharmacy	68	38.88	29.16	77.76	-	-	224,128.30
Fast Food	450	29.16	24.30	38.88	-	-	736,265.50
Total	5,617						14,016,813.90

New England NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non- locally owned)	Total loss in income (local+non- local)
Retail	3240	38.88	29.16	77.76	1567	5,132,994.6	10,610,661.00
Hospitality	2608	30.975	26.55	35.40	662	987,123	3,888,280.40
Pharmacy	73	38.88	29.16	77.76	-	-	237,568.50
Fast Food	477	29.16	24.30	38.88	-	-	780,416.80
Total	6,398						15,516,926.70

O'Connor WA	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non- locally owned	Total loss in income (local+non- local)
Retail	3073	38.88	29.16	77.76	764	2,502,574.9	10,065,082.80
Hospitality	2415	30.975	26.55	35.40	408	608,027	3,600,866.00
Pharmacy	69	38.88	29.16	77.76	-	-	225,353.20
Fast Food	452	29.16	24.30	38.88	-	-	740,289.40
Total	6,009						14,631,591.40

Page NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3205	38.88	29.16	77.76	1447	4,740,451.90	10,496,682.30
Hospitality	2449	30.975	26.55	35.40	695	1,036,966.00	3,650,890.70
Pharmacy	72	38.88	29.16	77.76	-	-	235,016.60
Fast Food	471	29.16	24.30	38.88	-	-	772,033.70
Total	6,197						15,154,623.30

Parkes NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non- local)
Retail	3086	38.88	29.16	77.76	1359	4,450,641.90	10,106,115.10
Hospitality	2535	30.975	26.55	35.40	126	187,183.00	3,779,135.70
Pharmacy	69	38.88	29.16	77.76	-	-	226,271.90
Fast Food	454	29.16	24.30	38.88	-	-	743,307.40
Total	6,144						14,854,830.10

Paterson NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non- local)
Retail	2815	38.88	29.16	77.76	1428	4,676,015.90	9,220,120.40
Hospitality	2709	30.975	26.55	35.40	1054	1,571,684.00	4,039,263.90
Pharmacy	63	38.88	29.16	77.76	-	-	206,434.90
Fast Food	414	29.16	24.30	38.88	-	-	678,142.20
Total	6,001						14,143,961.40

Richmond NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non- locally owned	Total loss in income (local+non- local)
Retail	3105	38.88	29.16	77.76	1645	5,386,483.40	10,169,943.20
Hospitality	3478	30.975	26.55	35.40	1501	2,237,376.00	5,185,283.40
Pharmacy	70	38.88	29.16	77.76	-	-	227,701.00
Fast Food	457	29.16	24.30	38.88	-	-	748,001.90
Total	7,110						16,330,929.50

Riverina NSW	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3411	38.88	29.16	77.76	1624	5,318,856.00	11,172,956.10
Hospitality	2600	30.975	26.55	35.40	606	903,718.00	3,876,456.40
Pharmacy	76	38.88	29.16	77.76	-	-	250,158.10
Fast Food	502	29.16	24.30	38.88	-	-	821,773.80
Total	6,589						16,121,344.40

Solomon NT	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	2159	38.88	29.16	77.76	1080	3,537,444.20	7,072,760.90
Hospitality	2092	30.975	26.55	35.40	782	1,166,211.00	3,119,719.70
Pharmacy	48	38.88	29.16	77.76	-	-	158,356.30
Fast Food	318	29.16	24.30	38.88	-	-	520,203.40
Total	4,617						10,871,040.30

Wakefield SA	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3603	38.88	29.16	77.76	2538	8,313,761.40	11,800,599.10
Hospitality	2197	30.975	26.55	35.40	1339	1,996,075.00	3,275,251.00
Pharmacy	81	38.88	29.16	77.76	-	-	264,210.80
Fast Food	530	29.16	24.30	38.88	-	-	867,937.10
Total	6,411						16,207,998.00

Wannon VIC	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	2861	38.88	29.16	77.76	1061	3,476,047.70	9,372,092.00
Hospitality	2481	30.975	26.55	35.40	323	481,601.00	3,699,096.30
Pharmacy	64	38.88	29.16	77.76	-	-	209,837.40
Fast Food	421	29.16	24.30	38.88	-	-	689,319.80
Total	5,827						13,970,345.50

Wide Bay QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non- locally owned firms	Income leaving the electorate annually (Non-locally owned	Total loss in income (local+non- local)
Retail	3016	38.88	29.16	77.76	1095	3,584,859.40	9,876,637.90
Hospitality	2880	30.975	26.55	35.40	804	1,198,864.00	4,294,844.50
Pharmacy	68	38.88	29.16	77.76	-	-	221,134.00
Fast Food	444	29.16	24.30	38.88	-	-	726,429.30
Total	6,408						15,119,045.70

Wright QLD	Number of workers	Sunday Hourly Wage	Wage from 07/17	Weekly Gross Income Loss (8h day)	# of Employees working in Non-locally owned firms	Income leaving the electorate annually (Non-locally owned)	Total loss in income (local+non-local)
Retail	3092	38.88	29.16	77.76	1587	5,197,341.50	10,125,871.40
Hospitality	2244	30.975	26.55	35.40	1314	1,959,875.00	3,345,285.50
Pharmacy	69	38.88	29.16	77.76	-	-	226,714.30
Fast Food	455	29.16	24.30	38.88	-	-	744,760.40
Total	5,860						14,442,631.60

Conclusion

This report has illustrated the significant changes that will occur in the structure and stability of regional economies if the cut in Sunday penalty rates is implemented. The detrimental impact on the retail and hospitality sectors which employ a considerable portion of rural workers will have knock-on effects on their respective local economies, resulting in a decline in living standards for workers and their families.

This report has identified a total loss of \$667 million in disposable income across the all regional and rural electorates in Australia, and estimated that a total of approximately \$289.5 million will be removed from regional and rural Australian economies more broadly.

As mentioned in this report, the estimates generated for the losses in income are conservative, and it is likely that the changes in penalty rates lead to larger and more adverse impacts than estimated in this report, particularly over the longer term.

The reduction in pay for many members of the workforce is significant, and will lead to a reduction in disposable income throughout their communities. Certain retail and pharmacy workers stand to lose \$77.76 dollars a week, fast food workers, \$38.88 and hospitality workers, \$35.40 a week. Leichardt, Queensland which employs over 9348 workers and will suffer a loss of at least \$21,062,030.70 per annum in disposable income from workers employed both in local. Non-local firms will be impacted the greatest by this change resulting in a total loss of \$19,237,138.90 of disposable income per annum across the electorate.

Lingiari, in the Northern Territory will suffer a loss in disposable income of \$8,027,894 per annum which is the lowest estimate across the electorates. This disproportionate cut in Sunday rates for full time and part time workers in turn will lead to reduced disposable income for spending in regional areas leading to financial instability for local businesses and their employees. The income that will leave the economy due to the reduction in pay for workers



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employed in firms that are owned non-locally will further damage regional electorates as spending, consumption and living standards decline.

Additionally, the workers who are on Enterprise Bargain Agreements will not be directly affected by these changes but the cuts in penalty rates will feed into these agreements and cause losses in income to these workers as well. It is probable in the future that the nature of the February 23 FWC ruling will be factored into future enterprise bargaining agreements.



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