

An Update on U.S. Workforce Activity

August 31–September 6, 2020



This report explores weekly workforce data from 3.2 million employees across 30,000 U.S. businesses — including employee shifts worked and pay statements generated — to better understand the economic health of the national workforce.



The Current State of the National Workforce

Tracking high-frequency workforce metrics

Understanding the working economy with anonymized and aggregated workplace data

By tracking employee shifts and pay statements based on daily employee data captured by Kronos customers, this report intends to provide directional insight into the current conditions of the national working economy. See all historical weekly reports at **[Kronos.com/USWorkforceActivity](https://www.kronos.com/USWorkforceActivity)**.

While non-seasonally adjusted shift growth last week hovered just under 1.0% for the second consecutive week, shifts have risen just 7% in the eight weeks following the July 4 holiday. By comparison, shifts rose 32% in the 11 weeks leading up to the July 4 holiday (April 13–June 28).

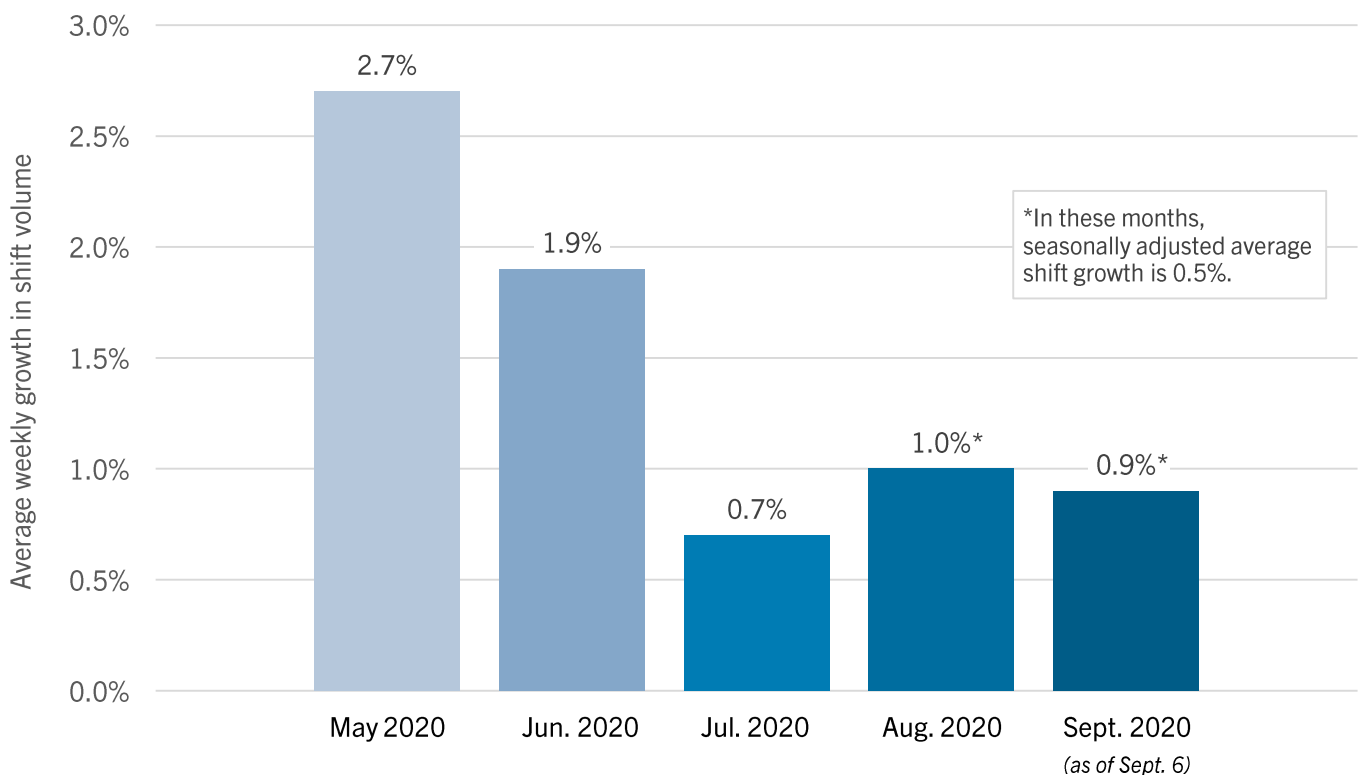
Shifts worked

Average weekly shift growth stabilizes at 1%

Average weekly shift growth by month

This data reflects the average weekly growth of shifts worked as measured by time punches — when employees clock in at the beginning of their shift and clock out at the end of it via time clock, mobile, and web-based punches — starting in May 2020 and compared on a monthly basis.

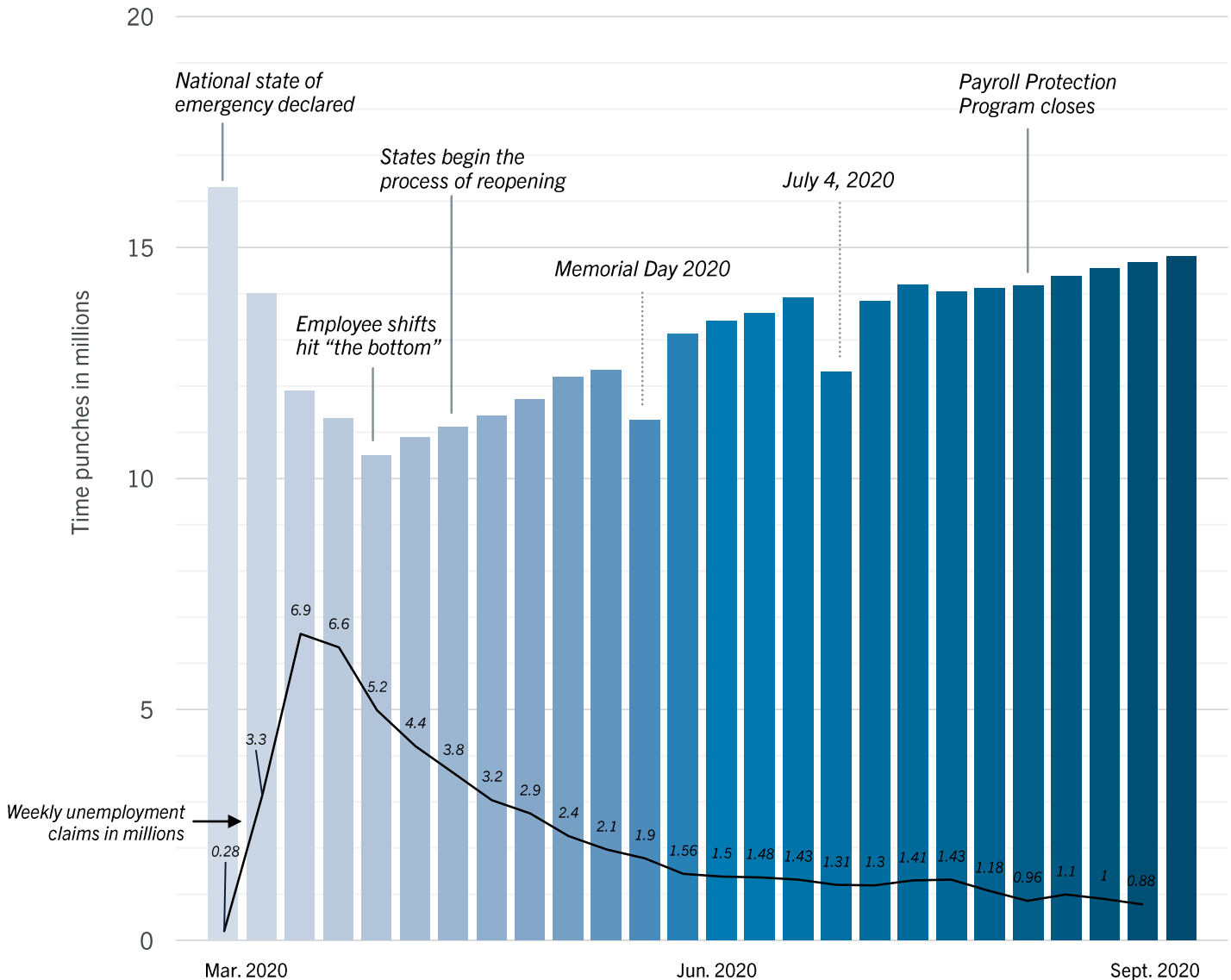
After a promising average weekly shift growth of 2.7% in May and 1.9% in June, the rate has hovered at or below 1.0%: Shifts grew a weekly average of 0.7% in July, 1.0% in August, and 0.9% in September to date, a modest rise heavily influenced by the late summer return to school. When adjusted for seasonality, August and September to date drop to 0.5% on average.



Shifts worked since hitting “the bottom”

This data reflects shifts worked as measured by 340 million time punches since reaching “the bottom” of shift work as a result of the COVID-19 pandemic in the week ending April 12.

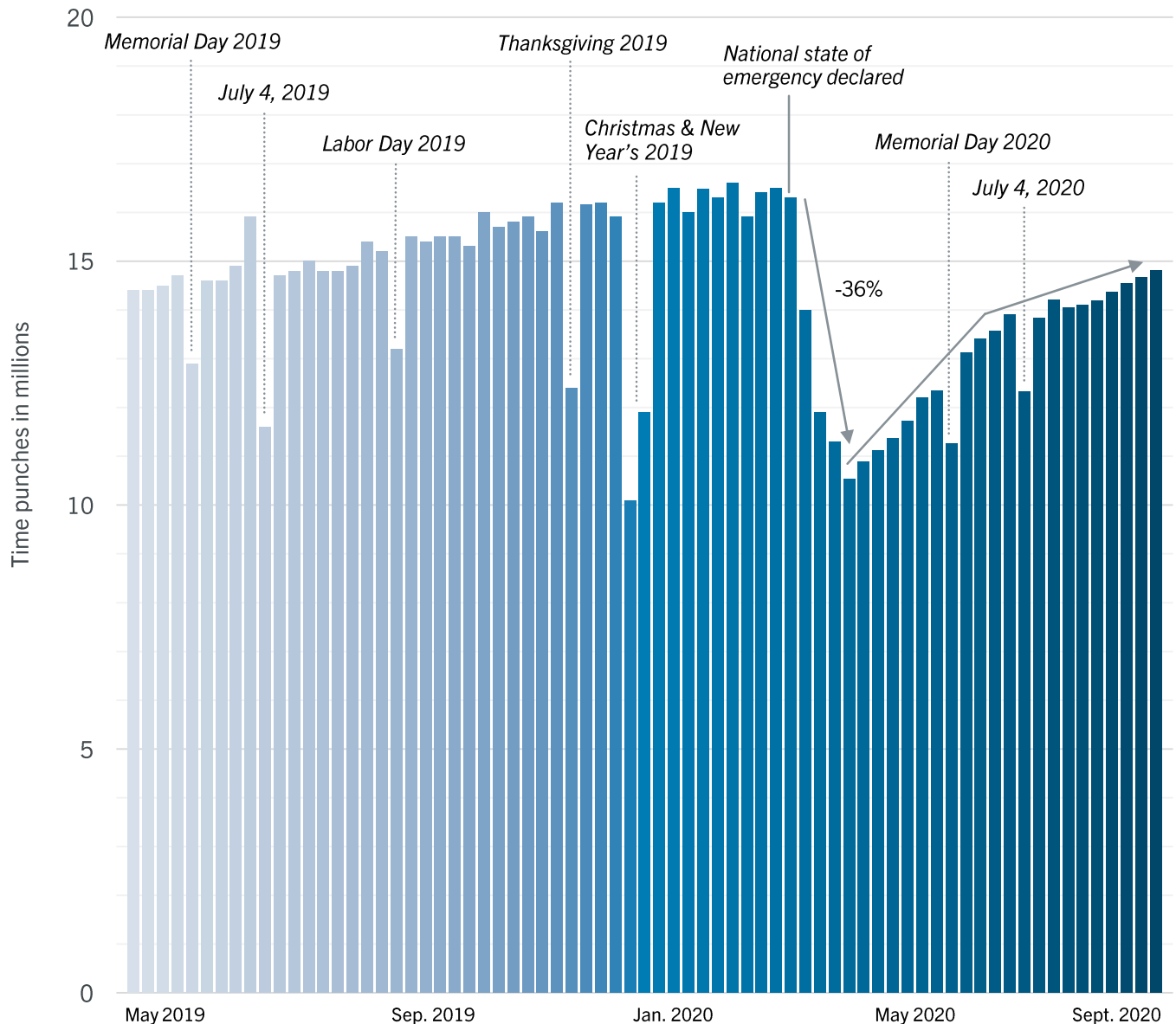
For the fourth consecutive week, public sector organizations have driven the majority of shift growth, with 54% of the 0.9% rise in shifts from August 30–September 6 attributed to K–12 and higher education institutions resuming fall operations. However, when adjusting for educational seasonality, last week marked the seventh straight week of sub-1.0% seasonally adjusted shift growth.



Shifts worked year over year

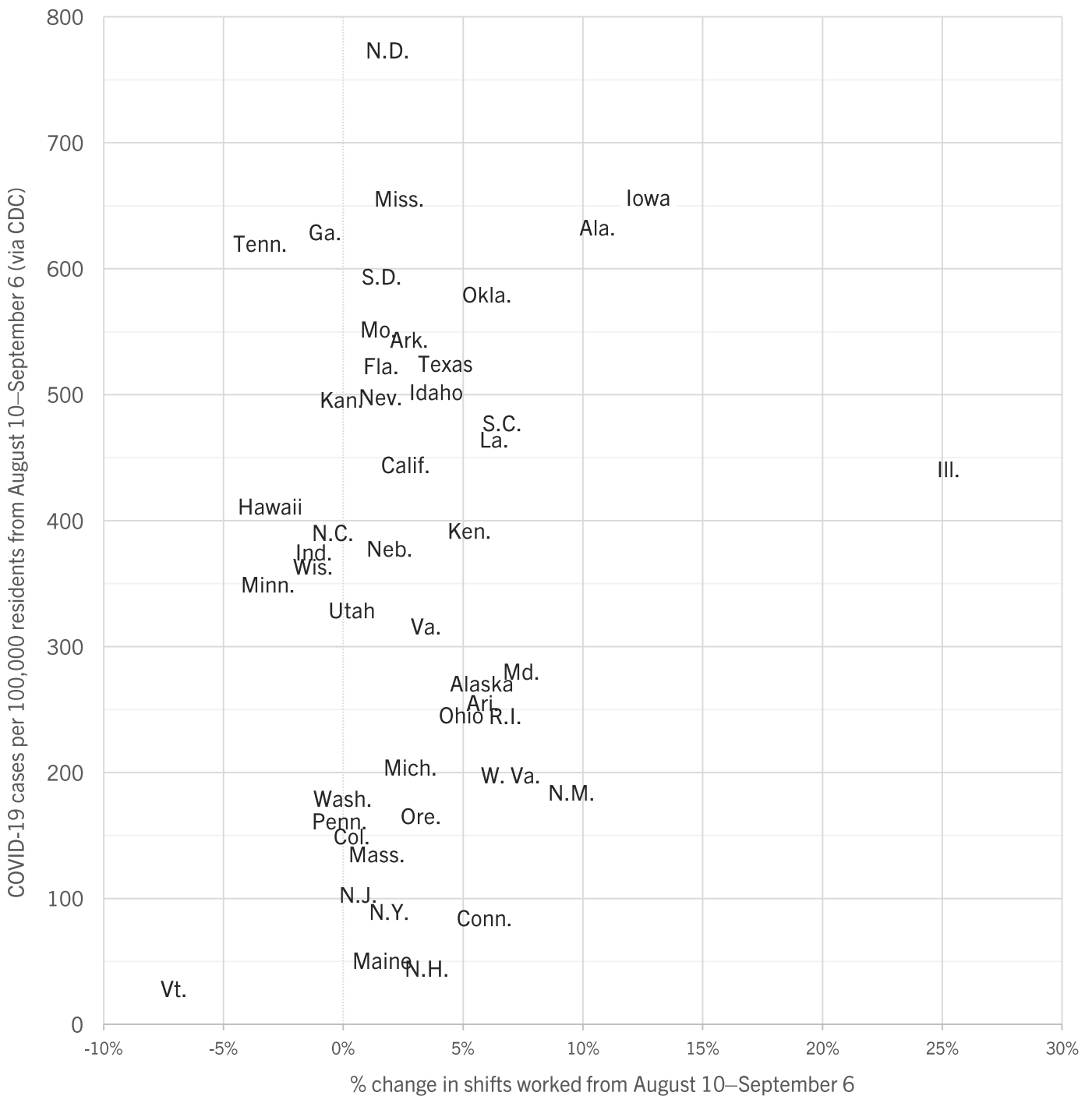
This data reflects shifts worked as measured by more than 1 billion time punches over the past 17 months. With the exception of national holidays, data has historically shown remarkable consistency prior to the COVID-19 pandemic despite expected fluctuations in time off, hirings, and terminations.

As educational seasonality comes to a close, data should reveal how the trajectory of shift work — and, as a result, the work activity of hourly employees — may change in the fall and winter seasons.



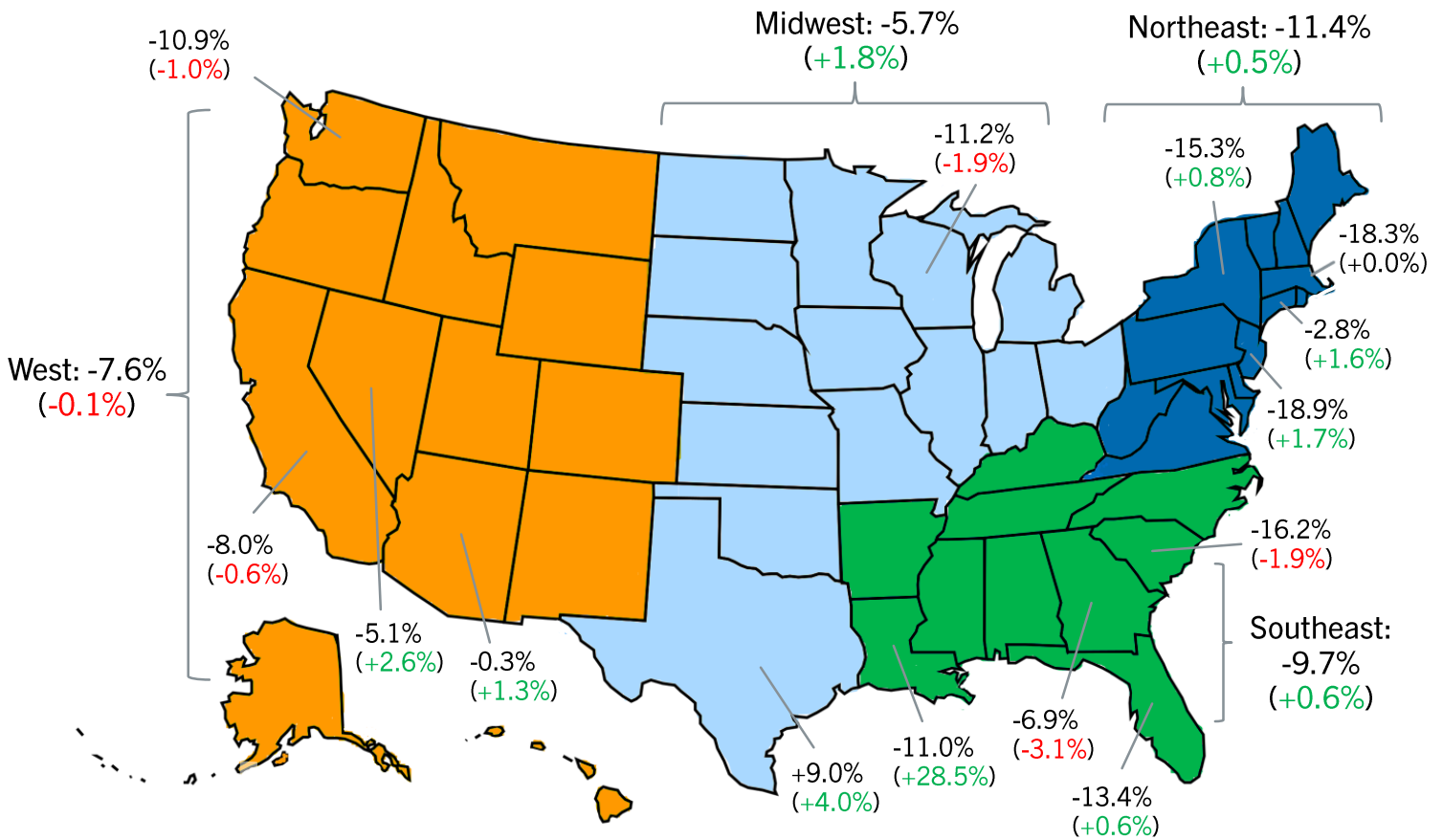
Change in shifts worked vs. COVID-19 cases by state (August 10–September 6)

This data compares the change in shifts worked to the number of new COVID-19 cases per 100,000 residents over the past rolling four weeks, revealing the relationship between cases and shifts.



Shifts worked across specific regions and states

This data reflects the changes in shifts worked as measured by time punches since the week ending March 15 (in black), as well as weekly shift increases (in green) or decreases (in red) since August 31.



18

Overall recovery of shifts lost in March and April sits between 60–80% for 18 states.

22

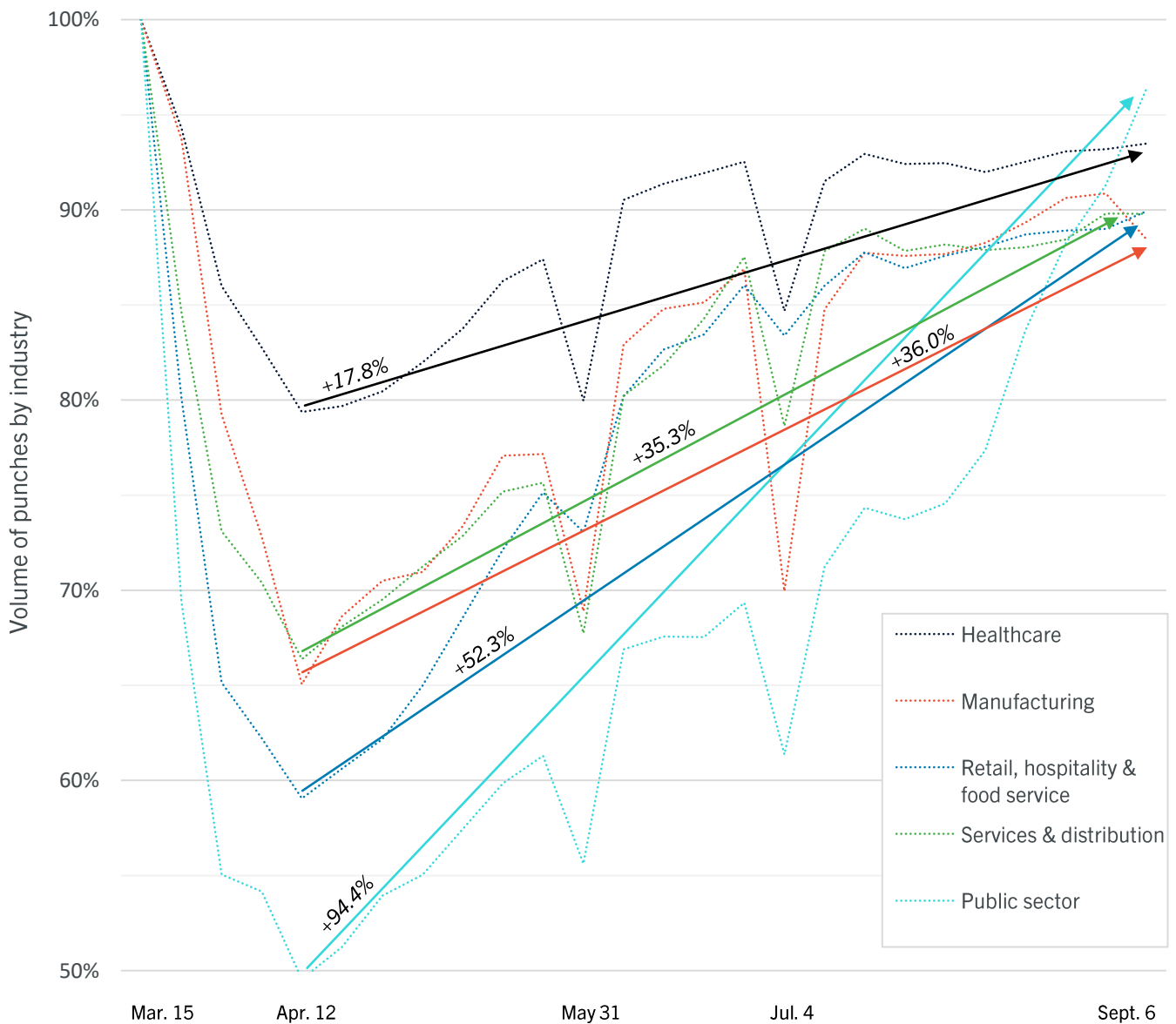
Twenty-two states have paused or reversed reopening plans due to COVID-19 concerns.

25

Shifts dipped across 25 states — half of the U.S. — last week, primarily in the Midwest.

Shifts worked across specific industries

This data reflects the percentage changes in shifts worked across industries as measured by time punches. For the first time since the start of the pandemic, the public sector (-3.7%) — bolstered by K–12 and higher education institutions resuming fall operations over the past four weeks — has eclipsed healthcare (-6.5%) as the industry closest to reaching pre-pandemic levels. Retail, hospitality & food service (-10.1%), services and distribution (-10.2%), and manufacturing (-11.5%) remain converged around 90% of shift volume compared to shift work seen in early March.



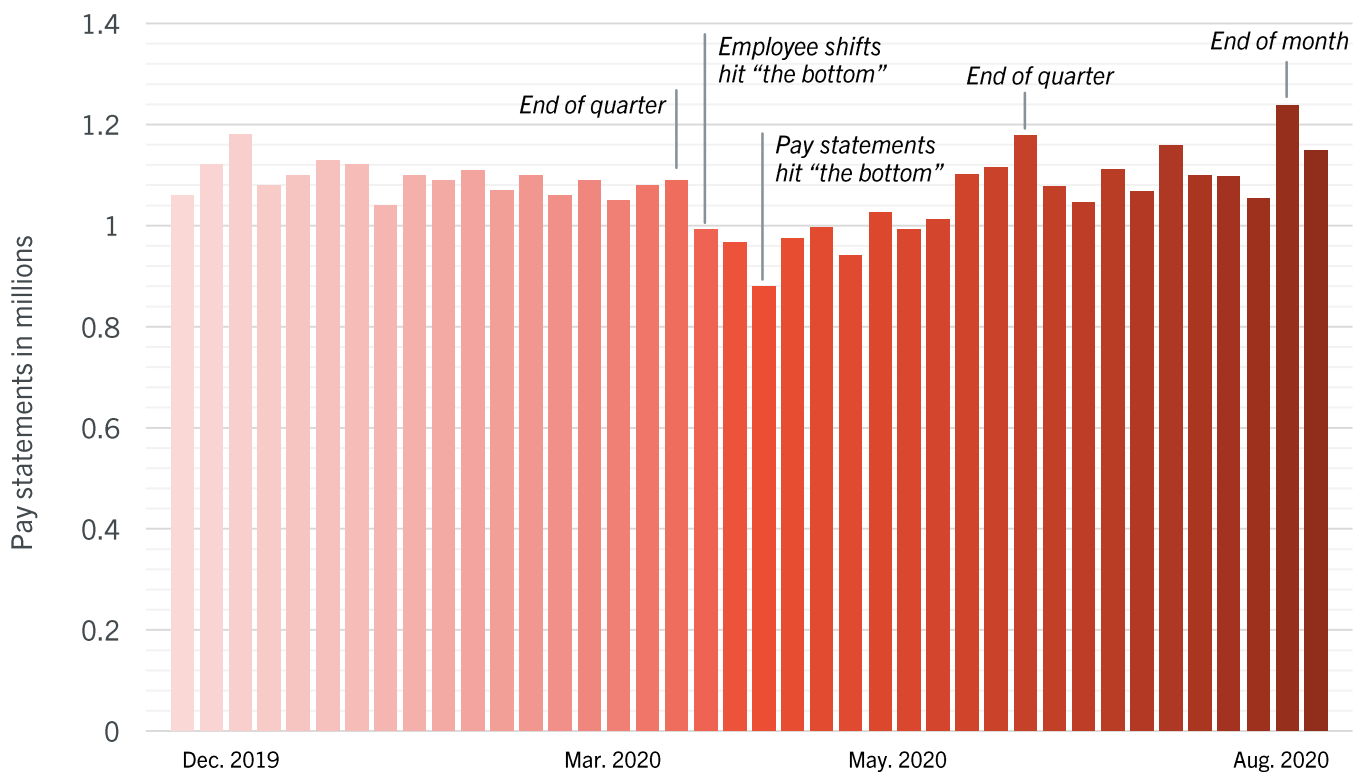
Pay statements

Payroll steadies following stable shift growth

Pay statements generated

This data reflects the number of pay statements generated each week — including direct deposit and physical checks — for 3.2 million U.S. employees. Following a tumultuous spring and early summer, the slowing but steadying labor recovery has led to notable gains in payroll over the past two weeks.

Because pay statements reflect previous hours worked, are generated by an employer with varying frequencies (e.g., weekly, biweekly, monthly), and employees often receive payments after termination (e.g., vacation accrual payout, severance), data should continue to reveal the resulting impact of changes in shifts worked on pay statement generation.





About This Report

Methodology

The U.S. Workforce Activity Report measures week-by-week metrics including employee shifts worked, new hires and terminations, and pay statements from 3.2 million employees across approximately 30,000 Kronos customers. The data included in this report is not seasonally adjusted.

Visit **[Kronos.com/USWorkforceActivity](https://www.kronos.com/USWorkforceActivity)** for the latest data report.

“Shifts worked” is a total derived from aggregated employee time and attendance data and reflects the number of times that employees, especially those who are paid hourly or must be physically present at a workplace to perform their jobs, “clock in” and “clock out” via a time clock, mobile app, computer, or other device at the beginning and end of each shift.

“Pay statements” reflect the number of payroll checks generated each week, including both direct deposit transfers and physical checks.

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