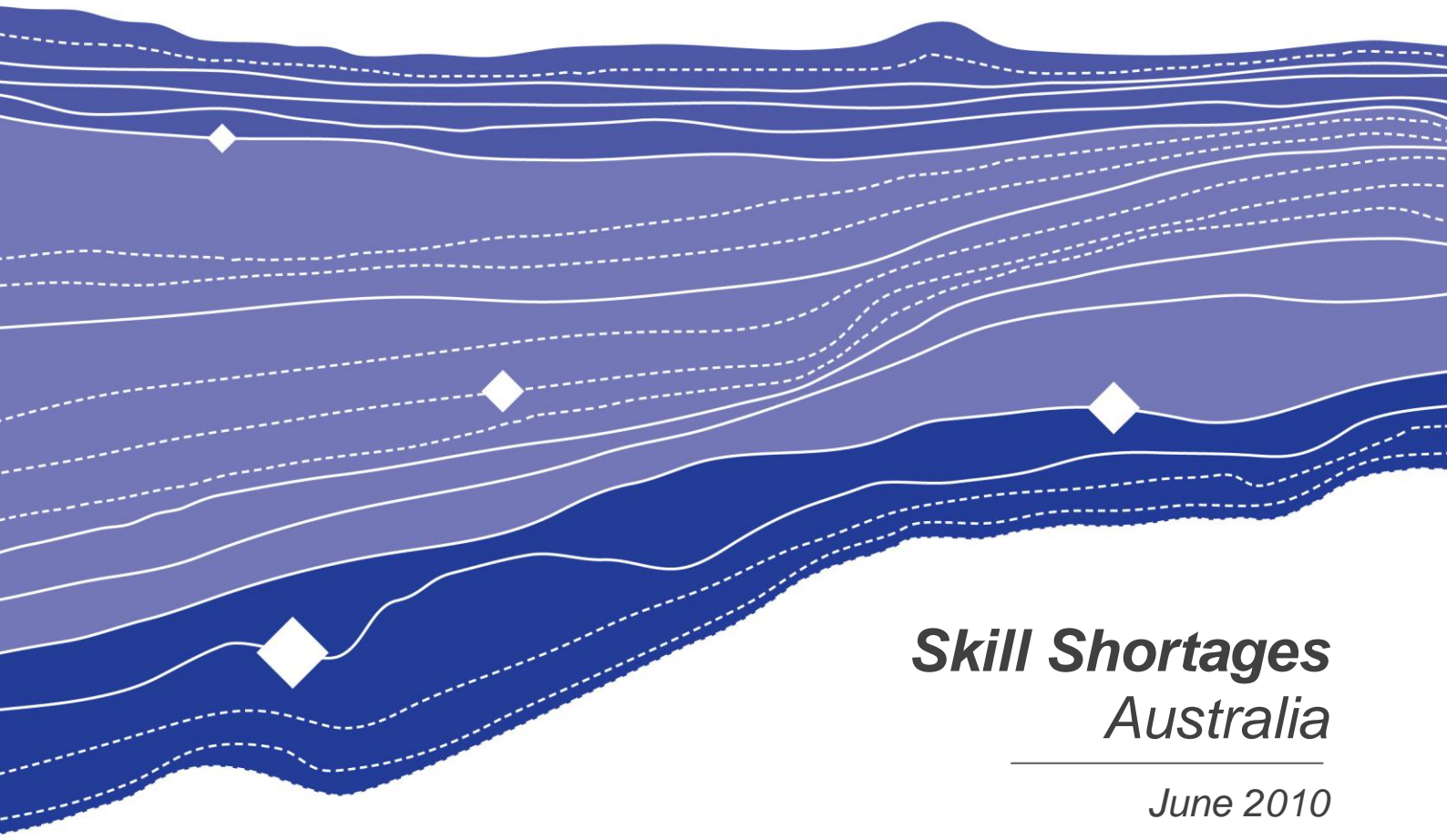




Australian Government



Skill Shortages ***Australia***

June 2010

Prepared by Labour Market Research and Analysis Branch
Department of Education, Employment and Workplace Relations
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PREFACE

This is the first in a series of six monthly skill shortage reports prepared to provide information about the Australian labour market and to report on the results of ongoing skill shortage research undertaken by the Department of Education, Employment and Workplace Relations (DEEWR).

The *Skill Shortages, Australia* report provides a basis for discussion aimed at greater engagement with key stakeholders to identify current and emerging labour market issues relating to skill development and the reasons employers experience difficulty recruiting the skills they need.

This publication is based on research undertaken in the Department's 2009-10 research program, which included contact with more than 9000 employers, and is current as at the end of June 2010. The research is based on a Survey of Employers who have Recently Advertised (SERA) and covers a range of skilled occupations, particularly in the trades and professions. Further information about the methodology and lists of skill shortages is published at www.deewr.gov.au/skillshortages.

This report brings together statistics from the Australian Bureau of Statistics Labour Force Survey, information about trends in the level of advertised vacancies prepared by the Department and published in the monthly Vacancy Report www.skillsinfo.gov.au/vacancyreport and results of the skill shortage research.

The timing of the DEEWR research program, which focuses on professions in the first half of each calendar year and the trades labour markets in the second half, means there will not be new research for all labour markets each six months. Consequently, the second edition of *Skill Shortages, Australia* will provide updated information for trades and the third will update professional labour market analyses.

In addition, future editions will incorporate analysis of training numbers to provide enhanced information about supply and demand trends at the cluster level.

The Department's skill shortage research has been undertaken continuously over the past three decades. While some occupational labour markets are cyclical, responding relatively quickly to changes in economic conditions, in some skilled occupations shortages have been relatively persistent, even during periods in which the economy has been slowing.

Skill shortages can coexist with relatively high levels of unemployment and sometimes shortages are restricted to experienced workers or those who have specialist skills. Shortages can result from a number of factors including low levels of training, high levels of wastage, changes in technology, increasing demand for new skills within an occupation and locational mismatch, where workers who have the skills are not in close proximity to the employers seeking those skills.

Technical notes

Occupations in DEEWR's skill shortage research are defined according to the Australian and New Zealand Standard Classification of Occupations (ANZSCO). However, the occupation clusters presented in this publication are not necessarily aligned with ANZSCO groups.

DEEWR assigns skill shortage ratings to occupations based on the results of SERA, as well as consideration of a range of labour market indicators. Ratings are for Australia as a whole, unless it is indicated that they apply to metropolitan or regional areas only.

Companion publications for each state and territory are published at www.deewr.gov.au/skillshortages.

Occupations are assigned the following ratings:

- *Shortage*: Skill shortages exist when employers are unable to fill or have considerable difficulty filling vacancies for an occupation, or significant specialised skill needs within that occupation, at current levels of remuneration and conditions of employment, and reasonably accessible location.
- *Recruitment Difficulty*: Recruitment difficulties occur when some employers have difficulty filling vacancies for an occupation. There may be an adequate overall supply of skilled workers but some employers are unable to attract and recruit sufficient, suitable workers for reasons which include: specific experience or specialist skill requirements of the vacancy; differences in hours of work required by the employer and those sought by applicants; or particular location or transport issues.
- *No Shortage*: Research has not identified widespread significant difficulty filling vacancies. This does not mean individual employers in some locations or those seeking specialised skills will readily fill their vacancies.

EXECUTIVE SUMMARY

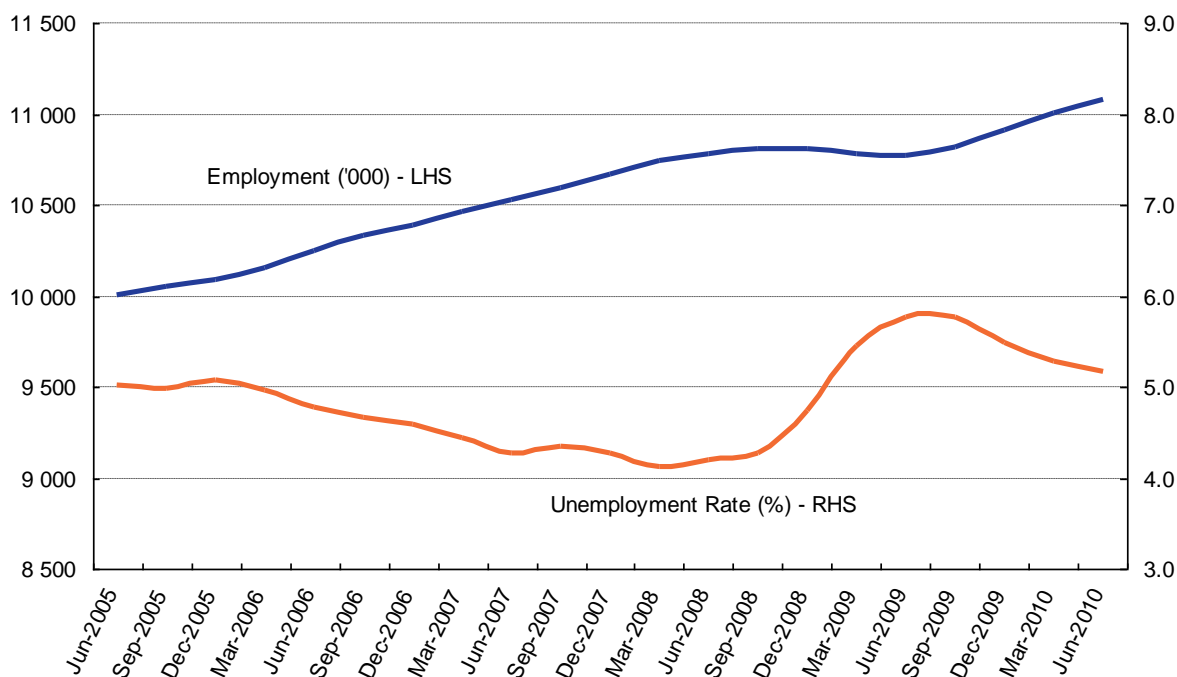
- *Skill shortages were widespread prior to the global recession in mid to late 2008, and were evident across a range of professions and technical and trades occupations.*
- *Shortages in a number of occupations have persisted for much of the past decade.*
- *DEEWR research shows there was a significant fall in demand for skilled workers over 2009 associated with the global recession, with a fall in the number of skilled occupations in shortage of about one third from 2008 to 2009.*
- *Over the nine months to June 2010 there were strong signs of a recovery in demand for skills and shortages became more widespread.*
- *Shortages are evident in at least one occupation in each cluster but are most apparent in the professional groups of engineering, health diagnostic and therapy, and nurses; and the trades groups of automotive, construction and food.*
- *Demand for skilled workers has not, though, returned to the level evident prior to the global recession and the extent of skill shortages varies across the states and territories, and across occupations.*
- *DEEWR research suggests employers are seeking workers who hold formal qualifications but they also place significant value on relevant experience. In some occupations newly qualified workers encounter some difficulty gaining employment despite shortages of experienced workers.*

LABOUR MARKET OVERVIEW

Employment growth and vacancy trends

- There were nearly 11 078 000 people employed in Australia in June 2010.
- The labour market has performed strongly over the past year. Despite a slight fall in employment from late 2008 to mid 2009, employment rose by 2.8 per cent (or 306 000) over the year to June 2010.
- Unemployment rose between April 2008 and June 2009 from 4.1 per cent to 5.8 per cent but has since fallen back to 5.2 per cent in June 2010 indicating a tightening in the labour market.
- The continued growth in employment and relatively low unemployment has meant increasing pressure on the supply of skilled workers and some broadening in skill shortages over late 2009 and early 2010.

Employment and Unemployment Rate, Australia, June 2005 to June 2010

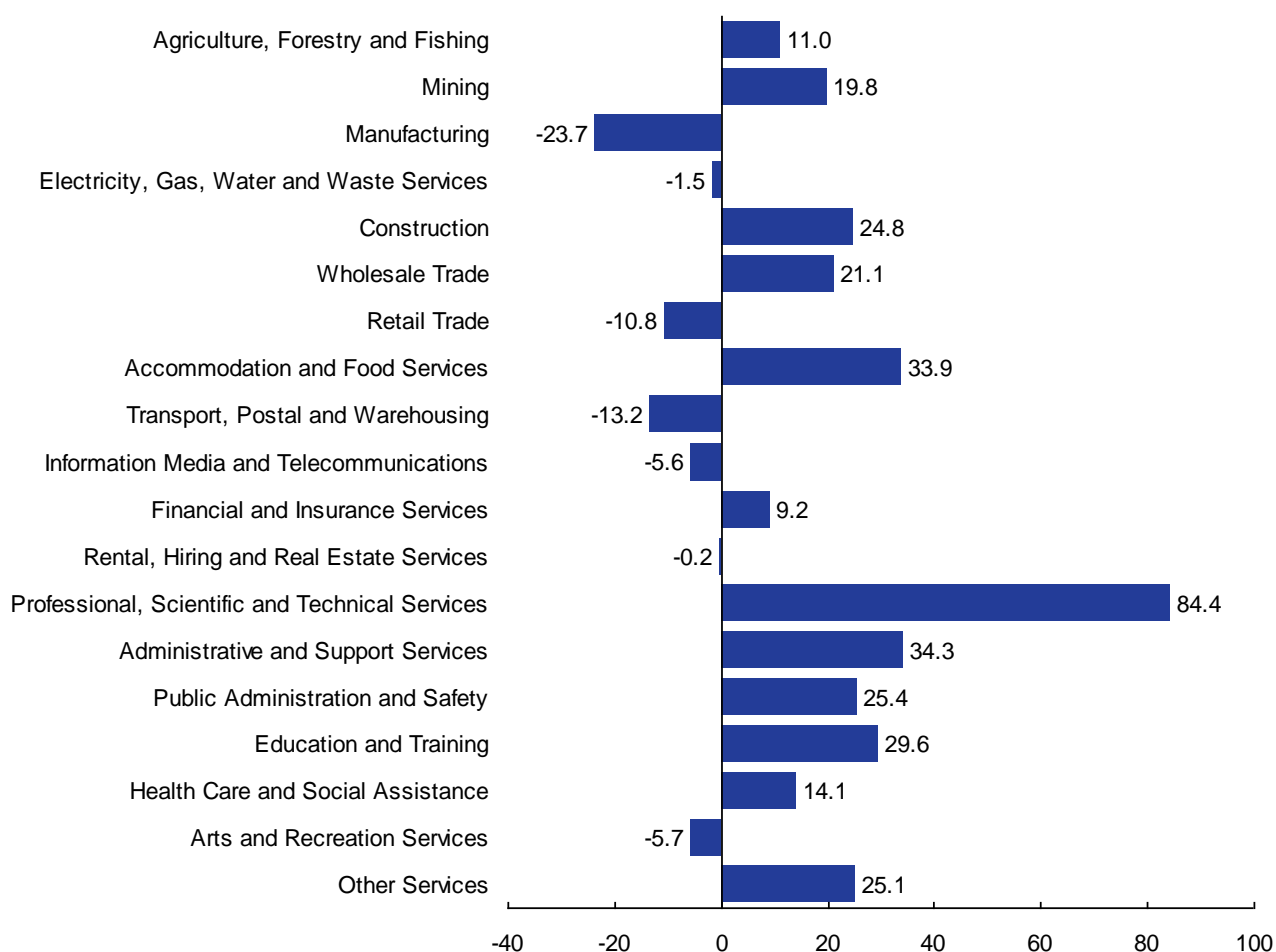


Source: ABS Labour Force Survey, trend data.

Employment by industry

- Health care and social assistance is the largest employing industry with 10.9 per cent of Australia's employment, followed by retail trade (10.7 per cent) and construction (9.1 per cent).
- Twelve industries increased their employment over the year to May 2010 with the largest increases being in professional, scientific and technical services (84 400) and accommodation and food services (33 900).
- Employment fell in seven industries, with manufacturing (23 700) and transport, postal and warehousing (13 200) having the largest decreases.

Industry Employment Growth, year to May 2010 ('000)



Source: ABS Labour Force Survey, trend data

Employment by occupation

- In occupational terms, employment growth in the year to May 2010 was concentrated in the skilled occupational groups of managers and professionals. These highly skilled groups contributed 261 700 new jobs.
- There were employment losses among clerical and administrative workers and community and personal service workers.
- Employment of technicians and trades workers and labourers was relatively stable.

Employment by Occupation, May 2009 and May 2010 ('000)

	Employment		Annual change	
	May-09	May-10	'000	%
Managers	1402.6	1497.0	94.4	6.7
Professionals	2226.3	2393.6	167.3	7.5
Technicians and Trades Workers	1613.4	1617.1	3.6	0.2
Community and Personal Service Workers	983.7	966.9	-16.9	-1.7
Clerical and Administrative Workers	1662.5	1626.8	-35.6	-2.1
Sales Workers	1009.9	1039.8	29.9	3.0
Machinery Operators And Drivers	695.8	720.4	24.6	3.5
Labourers	1151.2	1170.6	19.4	1.7
All occupations	10 772.9	11 044.6	271.7	2.5

Source: ABS Labour Force Survey, trend data

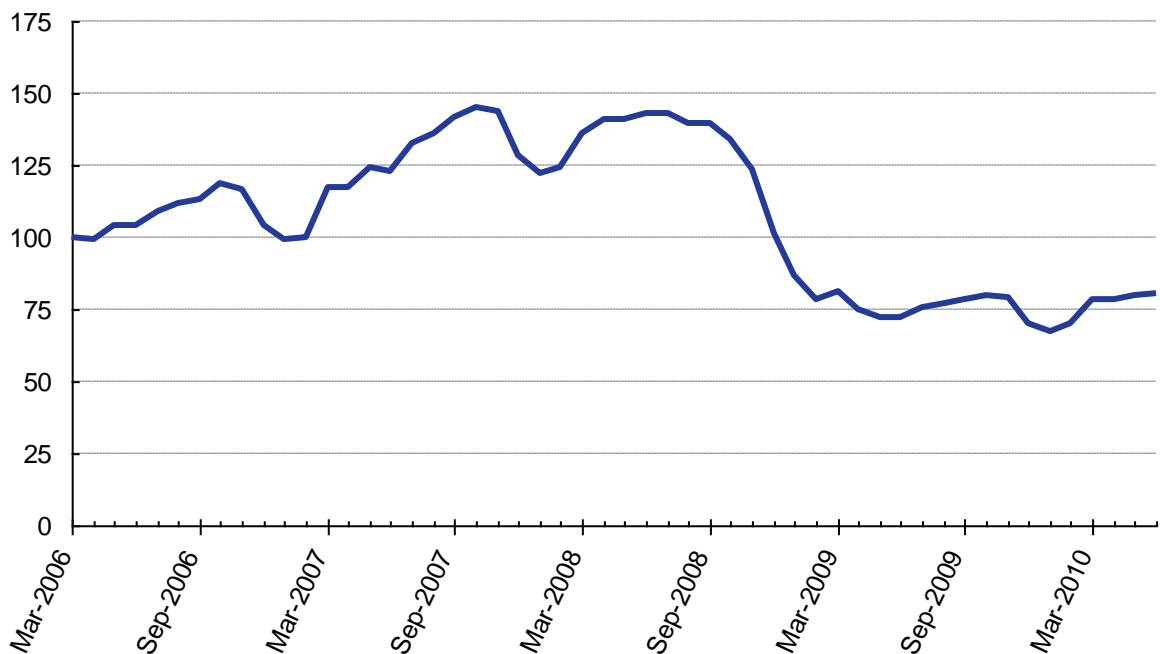
Vacancy trends

The DEEWR Internet Vacancy Index (IVI) (three month moving average) increased by 0.9 per cent in June 2010 to 80.3. In annual terms, the IVI was 11.5 per cent higher than in June 2009 suggesting there has been significant recovery in demand for labour since the recent lowpoint recorded in June 2009.

- On an occupational basis, vacancy levels rose for the skilled groups of professionals (up by 3.1 per cent) and technicians and trades workers (up by 1.1 per cent)
- In annual terms, growth in the level of advertised vacancies for technicians and trades (up by 21.3 per cent) was significantly stronger than the recovery in the level of professional vacancies (up by 11.2 per cent).

The graph below shows that advertised vacancies have not recovered to the level recorded prior to the onset of the global recession and remain relatively low.

Internet Vacancy Index, March 2006 to June 2010



Source: DEEWR Internet Vacancy Index

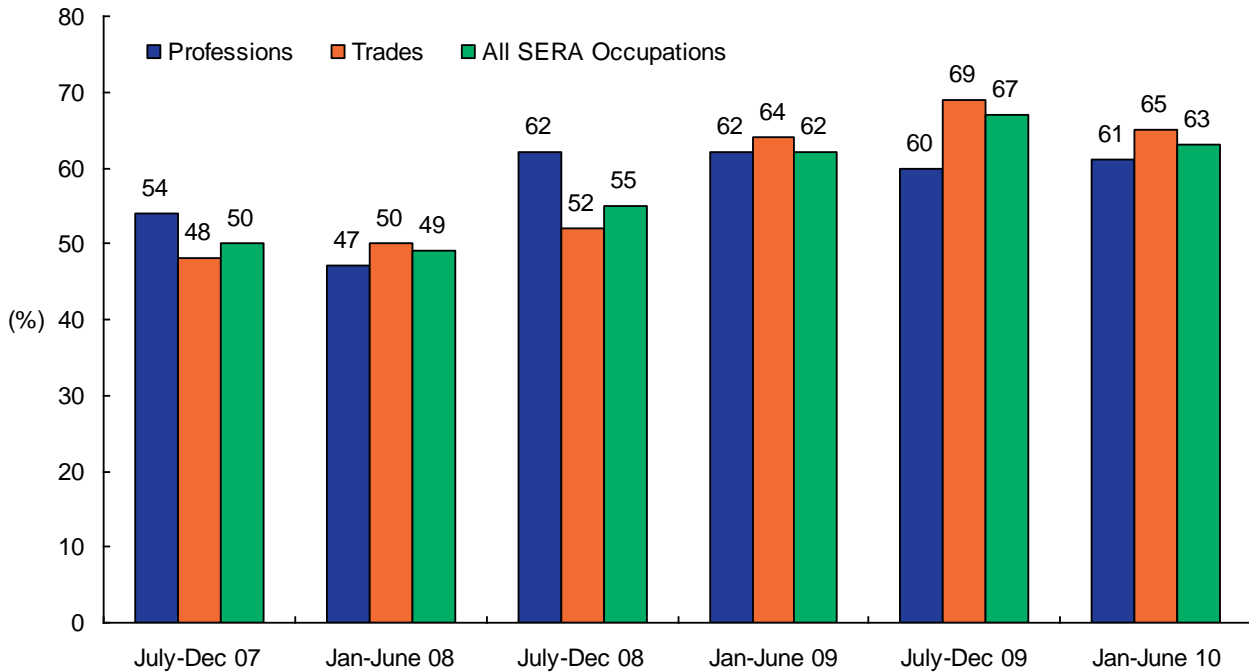
Results from Survey of Employers who have Recently Advertised

DEEWR's Survey of Employers who have Recently Advertised focuses on skilled occupations. Results indicate that, in line with employment growth, falling unemployment and rising vacancy levels, employers are experiencing greater difficulty filling their vacancies now than they did in 2009. Demand has not, however, returned to the levels evident in 2007-08 prior to the global recession.

- Overall, the proportion of vacancies filled and the number of suitable applicants per vacancy rose markedly during the global recession. Both these measures of skill shortage and labour market tightness have fallen slightly since late 2009 but not to the level recorded over 2007-08.
- Over late 2007 and early 2008 about half the surveyed vacancies were filled, but by late 2009, two thirds were filled. There was an average of slightly more than one suitable applicant per vacancy prior to the global recession, but the number almost doubled to more than two in 2009. Research undertaken over the first half of 2010

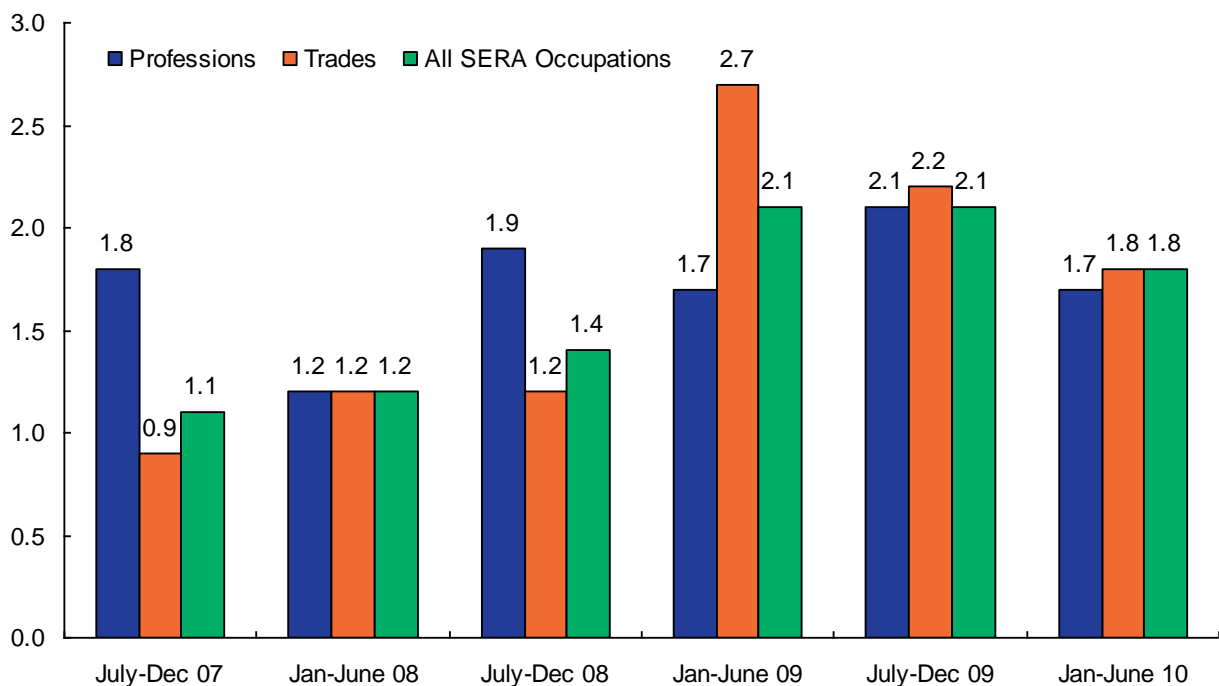
shows that, on average for all surveyed occupations, there were 1.8 suitable applicants per vacancy.

Proportion of Vacancies Filled for Professions, Technicians and Trades, and All SERA Occupations, 2007 to 2010 (%)



Source: DEEWR Survey of Employers who have Recently Advertised

Number of Suitable Applicants per Vacancy for Professions, Technicians and Trades, and All SERA Occupations, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Skill shortages in brief

With the improvement in employment and vacancies over the past year, shortages have re-emerged in a range of professional, technical and trade occupations. However, skill shortages are not as prevalent as they were prior to the global recession.

- The number of occupations in shortage declined by around one third between 2008 and 2009. By mid 2010 the number of occupations in shortage had risen slightly, and shortages were apparent in about 70 key occupations.
- The number of trade occupations in shortage has risen by around 10 per cent since mid 2009, with the number of professional occupations in shortage remaining relatively steady.
- Recovery has been uneven across the states and territories, and across occupations. In some locations and occupations, shortages co-exist with relatively high unemployment.
- Shortages are patchy and are mainly evident for experienced workers. Employers seeking newly qualified workers generally experience significantly less difficulty filling vacancies.

Shortages are evident in at least one occupation in each cluster but are most apparent in occupations in the following groups

- engineering professions
- health diagnostic and therapy professions
- nurses
- automotive trades
- construction trades
- food trades

Lists of skill shortages for the states and territories are available at www.deewr.gov.au/skillshortages.

Professions

In 2007 and 2008 shortages of professionals were widespread across Australia and across occupations. More than 40 professions were assessed as being in shortage in each of those years but the extent of professional shortages fell noticeably with the economic downturn in late 2008, and in 2009 just 25 professions were assessed as shortage.

Shortages in health professions were relatively unaffected by the global recession, but demand for business professions fell sharply and shortages abated. For engineers, there was some softening in demand but shortages persisted across a number of these occupations. There has been increased demand for professionals since mid 2009 but there has been little change in the number of professions in shortage in 2010. There is significant variation in these labour markets, and demand remains relatively subdued in some sectors.

- Shortages of professional engineers have returned to levels similar to those recorded before the global recession. Shortages are evident for 70 per cent of engineering professions surveyed.
- Demand for building professions other than engineers (for example, architects, surveyors) remains patchy.
- Shortages in the health professions have been persistent and remain widespread, although there has been some easing in these labour markets as higher training rates increase supply.

Examination of the proportion of vacancies filled for professions over the past two years shows the marked easing in the labour market between early 2008 and late 2008 to early 2009. The proportion of vacancies filled jumped by 15 percentage points, from 47 per cent to 62 per cent over the year to early 2009.

- There has been little change since then, with the proportion of vacancies filled hovering around 60 to 61 per cent.
- Over the past few years for professions there has not been a great variation in the number of suitable applicants per vacancy. Suitable applicant numbers are notably higher for professions in the second half of each calendar year, presumably reflecting students applying for positions on completion of their studies.
- Over the year to early 2010, the number of suitable applicants per vacancy was unchanged at 1.7 despite a rise to 2.1 in late 2009 perhaps reflecting graduands placing larger number of applications than in previous years in response to softer demand for 2008 graduates during the global recession.
- The number of professions in shortage has remained relatively steady in 2010 in line with relatively stable proportions of vacancies filled.
- The highest fill rate across professions in 2009-10 was for recorded for school teachers, where 84 per cent of vacancies were filled. Recruitment of nurses was notably more difficult with less than half the surveyed vacancies filled.
- Employers of business professionals attracted the largest number of suitable applicants per vacancy (3.4) and those recruiting for nurses attracted just 0.8 suitable applicants per vacancy.

Technicians and Trades Workers

In 2007 and 2008 national shortages of technicians and trades workers were evident across most trades groups including construction, engineering, automotive, food and electrotechnology. More than 60 occupations were assessed as being in shortage in 2007 but shortages were recorded for just 36 in 2009.

The downturn in the technicians and trades workers' labour market occurred over a longer time period than that for professions and was more marked, with the proportion of vacancies filled rising by more than 20 percentage points from 48 per cent in late 2007 to 69 per cent two years later.

All trades clusters were appreciably affected by the downturn.

Demand for technicians and trades workers has picked up since mid 2009 and the proportion of vacancies filled fell from 69 per cent in late 2009 to 65 per cent in early 2010. Nonetheless, employers generally experience less difficulty recruiting tradespeople than they did before the global recession.

- Shortages are becoming more widespread in the construction sector, with around half of surveyed trades assessed as being in shortage, compared with all surveyed construction trades in 2008.
- Shortages of automotive trades have also re-emerged, with a doubling in the number of these trades in shortage since August 2009.
- Although shortages are evident in the metal/engineering trades, and electrical/telecommunications trades, they are restricted to particular occupations such as telecommunications linesworkers and locksmiths.

Examination of the proportion of vacancies filled for technicians and trades workers over 2009-10 shows

- Employers recruiting construction trades filled the highest proportion of vacancies (73 per cent) with employers of agriculture and horticultural trades filling a relatively low proportion (59 per cent).
- As well as filling the highest number of advertised vacancies, employers in construction trades also received the largest number of suitable applicants per vacancy (2.4) while employers in the automotive trades attracted the lowest (1.4).

States

Between 2008-09 and 2009-10 the labour market for skilled workers eased in every state. In 2009-10, there was, however, some variation between the states and territories. Employers in New South Wales recruiting for skilled workers had the least difficulty, filling 70 per cent of their surveyed vacancies. Employers in the Australian Capital Territory experienced the greatest difficulty, filling 53 per cent of their surveyed skilled vacancies.

- Employers in Western Australia attracted, on average, 2.5 suitable applicants per vacancy while employers recruiting for the Australian Capital Territory labour market attracted 1.4 suitable applicants per vacancy.
- Further pressure on the supply of skills is expected across the states and territories, but particularly in Queensland, Western Australia and the Northern Territory, with ongoing recovery, particularly in the construction and resource sectors.

SKILL SHORTAGES IN DETAIL

Business Professions

February 2010

Occupations in cluster	Rating
1322-11 Finance Manager	No Shortage
2211-11 Accountant (General)	No Shortage
2211-12 Management Accountant	No Shortage
2211-13 Taxation Accountant	No Shortage
2212-13 External Auditor	No Shortage
2243-11 Economist	Recruitment Difficulties are evident for senior and experienced economists in specialist areas such as industry, retail and social economics.

This occupational grouping includes somewhat diverse occupations. In terms of employment size, accountants dominate the group having about 70 per cent of cluster employment, followed by finance managers with 20 per cent. There were relatively persistent shortages of accountants over the decade prior to the global recession although widespread shortages were not identified in other occupations in this group.

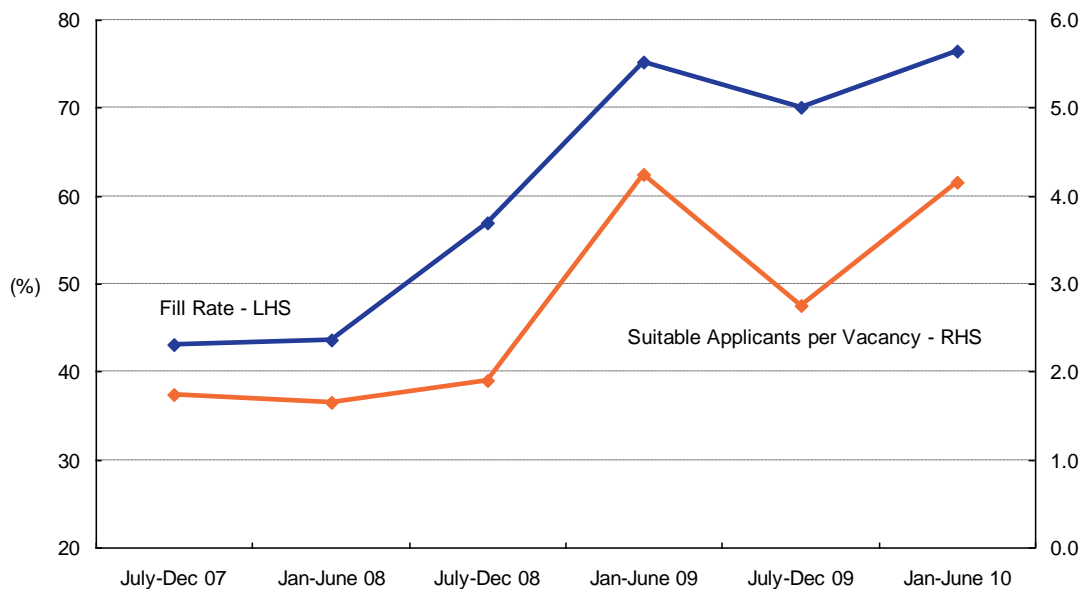
The onset of the global recession saw a noticeable easing in demand for business professionals with increases in the proportion of vacancies filled and the number of suitable applicants per vacancy. Demand has not recovered to pre recession levels and widespread shortages are not evident for business professionals.

Survey results

- Despite slightly tightening in the second half of 2009, the labour market for business professionals has remained relatively soft in the first half of 2010, with more than three quarters of surveyed vacancies filled, a similar proportion to that recorded in the first half of 2009 when the global recession had a significant impact on the labour market.
- The proportion of vacancies filled remains well above the level recorded during the peak demand period of 2007-08 suggesting a significant easing in the labour market over the past two years.
- On average in 2010 there were 4.2 suitable applicants per business professional vacancy, more than double the number prior to the onset of the global recession.
- The majority of surveyed employers who had recently advertised reported little difficulty filling vacancies. Employers of taxation accountants reported some difficulty finding qualified applicants who had the specialised taxation experience required, although most filled their positions.
- Employers of economists also encountered some difficulty filling vacancies but most were seeking specialist skills or experience. Almost half the surveyed vacancies were filled and there was an average of 1.8 suitable applicants per economist vacancy.
- All surveyed vacancies for management accountants were filled in 2010, while 93 per cent of finance manager vacancies were also filled. There was an average of 14.3 suitable applicants per finance manager vacancy.

- Employers in Queensland experienced more difficulty recruiting than employers in other states, with 60 per cent of surveyed vacancies filled and an average of 1.9 suitable applicants per vacancy in 2010. This compares with employers in New South Wales who filled more than over 80 per cent of vacancies and attracted 4.9 suitable applicants per vacancy.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Building Professions, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Why applicants were unsuitable

- The majority of applicants were qualified but were unsuitable for other reasons, including lack of specialised skill sets, such as taxation accountancy experience, or inadequate experience (many employers sought 3-5 years).
- Some employers commented that they received many applications from recent graduates and that they were often unsuitable as they lacked sufficient experience for the advertised positions.
- A large number of employers commented that they received applications from overseas-based candidates, however, they were generally considered to be unsuitable due to poor English language skills or a lack of local knowledge and experience.

Demand and supply trends

- Business professionals usually require a tertiary level qualification with some employers also requiring membership of a professional association.
- Despite falling by around 5 per cent between its peak in November 2007 and November 2008, employment of business professionals increased over the year to May 2010 to 237 200, with the strongest growth being for accountants (up by 8.3 per cent or 13 300). Employment growth for business professionals has been strong over the past five years.
- The DEEWR Internet Vacancy Index shows advertised positions for business professionals declined by about one third over the year to June 2010 and have been declining continually since mid 2008. The number of advertised vacancies is significantly lower than the level recorded before the onset of the global recession.

Labour market issues

- Significant and widespread shortages in these occupations were not apparent in early 2010 although employers in regional areas had some difficulty filling vacancies as did employers seeking specialist skills and experience. Some regional employers indicated they had difficulty attracting and retaining suitable applicants while others were unable to meet the salary expectations of suitable applicants.
- Although employment of business professionals has recovered to its peak level recorded in late 2007, the number of advertised vacancies has fallen and widespread shortages are not apparent.

Occupations in cluster	Rating
1331-11 Construction Project Manager	Shortage
2321-11 Architect	No Shortage
2321-12 Landscape Architect	No Shortage
2322-12 Surveyor	Shortage
2326-11 Urban and Regional Planner	No Shortage
2332-13 Quantity Surveyor	Shortage
3121-12 Building Associate	No Shortage
3121-14 Construction Estimator	Shortage
3121-11 Architectural Draftsperson	No Shortage

Shortages of building professions and associates were relatively persistent over the four years to 2009. However, overall demand for these occupations eased significantly in late 2008 and over 2009 and shortages abated.

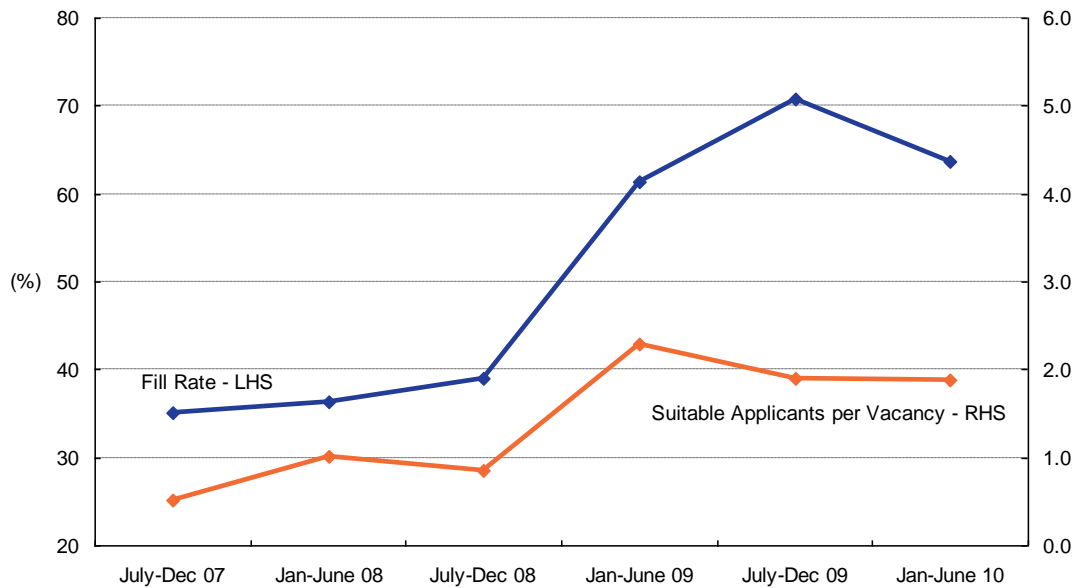
This is a relatively diverse group of occupations in terms of demand drivers, although economic cycles and the level of building construction both impact on demand for these skills. The majority of occupations included in this report were assessed in the first quarter of 2010 with a small number assessed in late 2009 and mid 2010.

Survey results

Building professions

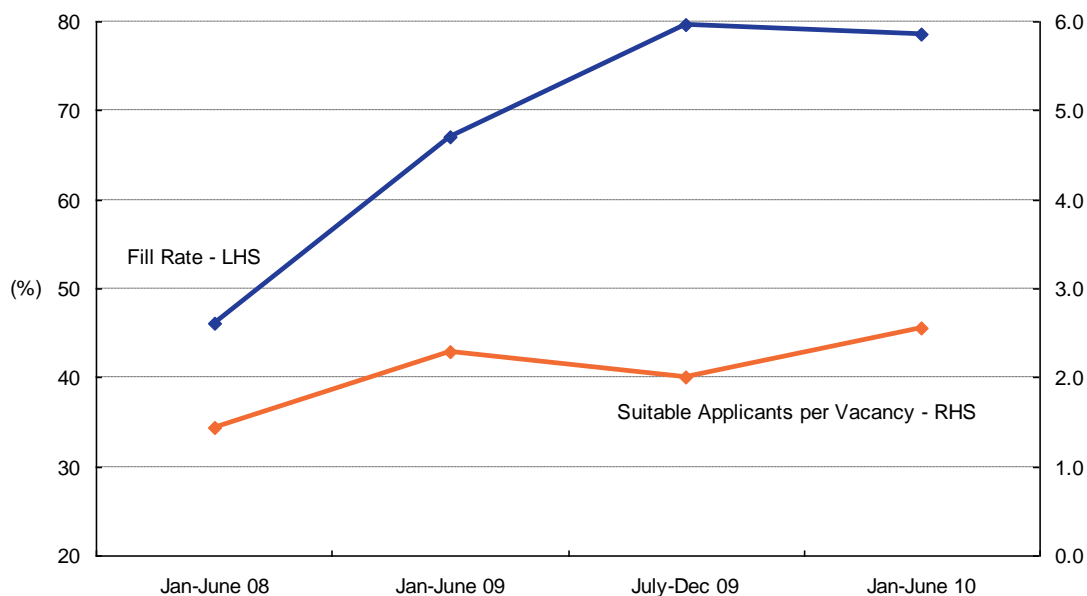
- There was a significant easing in the labour market for building professions from early 2008, when shortages were relatively widespread, to late 2009.
- The proportion of vacancies filled rose quickly, from less than 40 per cent in late 2008 to more than 70 per cent a year later.
 - There was a slight fall in the proportion of vacancies for building professionals that were filled in early 2010 (to almost two thirds) but the proportion remains almost 30 points higher than it was two years earlier.
 - The average number of suitable applicants per vacancy more than doubled between late 2008 and early 2009 and although the number fell slightly in late 2009, employers recruiting in 2010 attracted 1.9 suitable applicants per vacancy, on average, significantly more than in 2007 and 2008.
 - The majority of employers who advertised for building professionals over late 2009 and early 2010 reported little difficulty filling vacancies despite indications of strengthening demand.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Building Professions, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Building Associates, 2008 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

- There was a marked variation in the proportion of vacancies filled across the building professions over the 2009-10 research, from in excess of 90 per cent for landscape architect to about a quarter for quantity surveyors.
- Similarly, the experience of employers varied across states and territories. In New South Wales and Tasmania employers filled in excess of 80 per cent of their vacancies and attracted 2.4 suitable applicants per vacancy while in the ACT slightly more than half were filled and there were 1.6 suitable applicants per vacancy.
- Vacancies were across the residential, commercial and civil infrastructure construction sectors and employers were generally seeking qualified and experienced applicants.

Many reported attracting a large response to their advertised vacancies and some suggested the completion of projects resulting from government stimulus measures contributed to the increased number of applicants and the higher proportion of vacancies filled.

- Employers seeking applicants with five years or more experience had greater difficulty recruiting and those vacancies which were unfilled generally required highly specialist skills.
- Some vacancies remained unfilled despite attracting suitable candidates because applicants were unwilling to relocate.
- Some employers compromised by employing applicants from related occupations who had transferrable skills or recruited from overseas. Many employers advertised widely and multiple times to find workers who had appropriate skills and some suggested poaching of staff is common.

Building Associates

- The labour market for building associates was also affected by the global recession with the proportion of vacancies filled increasing markedly in 2008 and 2009 before levelling over the first half of 2010.
- In early 2010 almost 80 per cent of building associate vacancies were filled, significantly higher than in 2008 when 46 per cent were filled.
- The average number of suitable applicants per vacancy increased to 2.6 in early 2010, almost doubling in the past two years. Some employers suggested the completion of projects resulting from government stimulus measures contributed to the increased number of applicants and the higher proportion of vacancies filled.
- Some employers contacted for those occupations where shortages were apparent commented government stimulus measures had contributed to an increase in demand.
- Some of the employers who experienced difficulty recruiting compromised by employing applicants from related occupations who had transferrable skills or recruited from overseas.

Why applicants were unsuitable

- The main reasons employers considered applicants to be unsuitable were lack of qualifications, experience and adequate communication skills.
- Employers received a relatively large response from overseas applicants but they were generally considered to be unsuitable due to a lack of local knowledge and regulations.

Demand and supply trends

- In May 2010, 119 000 building professions and 52 600 building associates were employed in Australia, similar numbers to those employed in 2008.
- Employment is driven by activity on large scale construction and engineering projects.
 - ABS data indicate that after declining in the second half of 2008, the value of construction work done across Australia increased by 5.6 per cent in the year to March 2010.
 - The value of engineering work done in Australia has risen sharply in recent years, and increased by 2.3 per cent in the year to March 2010.
- The DEEWR Internet Vacancy Index shows the level of advertised vacancies for both building professions and associates fell markedly during the global recession. Despite some recovery in late 2009 and early 2010, vacancy levels remain well below those recorded prior to the downturn.

Engineering Professions and Associates

February to June 2010

Occupations in cluster	Rating
1332-11 Engineering Manager	Shortage
2331-11 Chemical Engineer	No Shortage
2332-11 Civil Engineer	Shortage
2332-14 Structural Engineer	Shortage
2332-15 Transport Engineer	Shortage
2333-11 Electrical Engineer	Shortage
2334-11 Electronics Engineer	No Shortage
2335-12 Mechanical Engineer	Shortage
2335-13 Plant or Production Engineer	No Shortage
2336-11 Mining Engineer	Shortage
2336-12 Petroleum Engineer	Shortage
3122 Civil Engineering Draftspersons and Technicians	Shortage of Draftspersons
3123 Electrical Engineering Draftspersons and Technicians	Shortage
3124 Electronic Engineering Draftspersons and Technicians	Shortage of Technicians
3125 Mechanical Engineering Draftspersons and Technicians	No Shortage

Shortages of engineers have been persistent over much of the past decade and the most recent research (undertaken between February and June 2010) shows employers continue to experience significant difficulty recruiting experienced engineers.

The labour market varies, though, across the occupations included here, with shortages of civil engineers being persistent even through the global recession, while engineering specialisations which have significant employment in manufacturing (such as mechanical and plant or production engineer) experienced greater variation in demand. The labour market for engineering associates has also been changeable, with shortages apparent over the peak demand period of 2007 and 2008 largely abating in 2009 and recovering to patchy shortages in 2010.

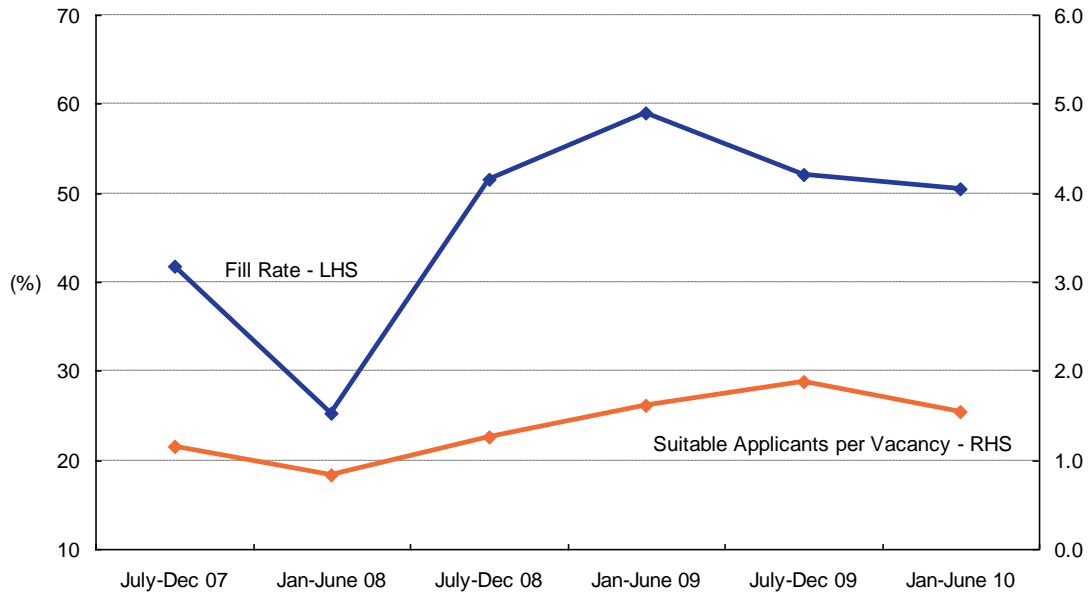
In line with indications of increased activity in employing industries over the latter part of 2009 and the first half of 2010, employer comments suggest demand for engineers and engineering associates rose significantly and shortages have become more widespread.

Survey results

Engineers

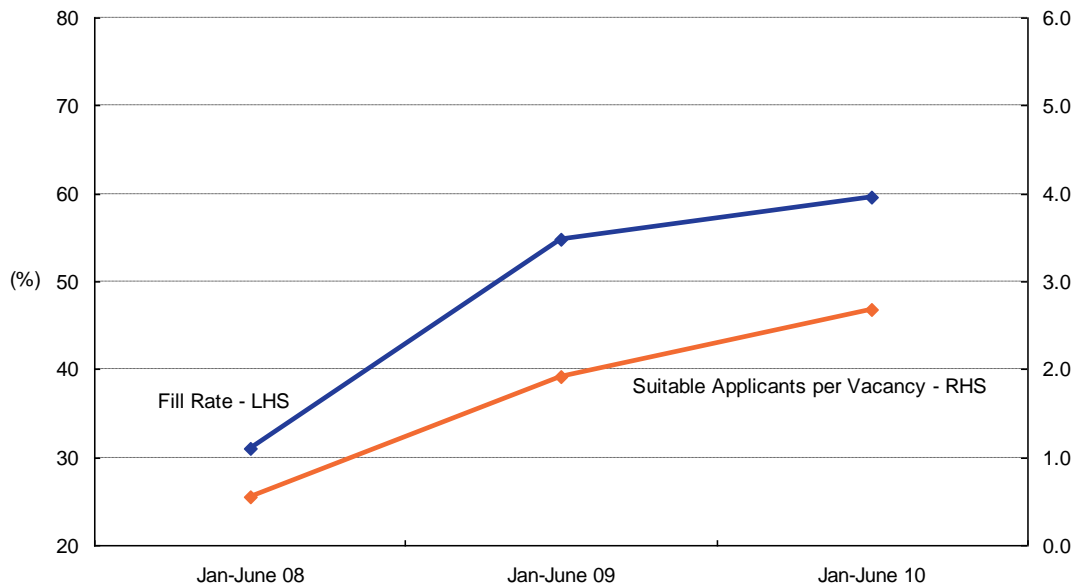
- The labour market has tightened somewhat over the past year with survey results showing fewer suitable applicants per vacancy and a marginally lower proportion of vacancies filled, suggesting employers continue to experience difficulty recruiting engineers.
- Comparing 2010 results with those immediately prior to the global recession, though, indicates shortages are not as widespread and that employers are not experiencing the same degree of difficulty as they did two years ago. Both the proportion of vacancies filled and the number of suitable applicants per vacancy were higher in early 2010 than those recorded in the first half of 2008.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Engineering Professions, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Engineering Associates, 2008 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

- Employers who had advertised in 2010 generally experienced difficulty filling positions but it is important to note they were commonly seeking qualified and experienced engineers (often requiring five to ten years or more of relevant industry experience). Recruitment appears to be significantly easier for graduate positions.
- The proportion of vacancies filled (about half overall) varied from 25 per cent for structural engineers to 71 per cent for electronics engineering positions.
- On average in 2010 there were around 1.6 suitable applicants per vacancy, double the number prior to the onset of the global recession. The figures varied across

specialist occupations. Employers recruiting mining engineers attracted the lowest number of suitable applicants per vacancy (0.6) and those recruiting electronics engineers attracted the highest (3.3).

- The labour market for engineers also varied by state, with the proportion of vacancies filled in 2010 being lowest in Queensland, Tasmania and the two territories (where about one third of surveyed vacancies were filled) and highest in Victoria and Western Australia (where more than 60 per cent were filled).

Engineering Associates

- Although shortages are apparent for some engineering associates, the proportion of vacancies filled in 2010 (60 per cent) is almost double the proportion recorded in early 2008.
- Employers continue to note an easing in the labour market for engineering associates in 2010 despite recovery in some key employing industries, such as the resource sector, since late 2009.
- Survey results show a consistent rise in both the number of suitable applicants per vacancy and the proportion of vacancies filled over the two years to 2010.
- There was large variation, though, in results across individual occupations. Just 30 per cent of surveyed civil engineering technician vacancies were filled but 90 per cent of electronic engineering draftsman vacancies were filled.
- Variation in the labour market was also evident in 2010 for engineering associates across the states, with the highest being proportion of vacancies filled being recorded for Tasmania (almost 90 per cent of vacancies filled) and the lowest being the Australian Capital Territory (20 per cent filled).

Why applicants were unsuitable

- Employers were mainly seeking engineers who had 5 to 10 years experience and many required sector-specific skills, for example in railway signalling, water services or hard rock mining, and found applicants who lacked relevant experience to be unsuitable.
- Employers generally considered applicants to be unsuitable because they lacked the length of experience required or did not possess the particular specialist skills being sought.
- Many overseas-based applicants were considered to be unsuitable because they lacked knowledge of local conditions or did not have the required level of English communication employers demanded.
- Although there were relatively large numbers of applicants per engineering vacancy surveyed (about 20 on average) and most appear to have relevant qualifications, a very small proportion (an average of about 1.6) of these applicants were considered by employers to be suitable.

Demand and supply trends

- Employment of engineers rose strongly between the May quarter 2008 and the same period in 2009 (up by 11.6 per cent) but grew only slightly (by 1.3 per cent) over the year to the May quarter 2010, despite employer comments suggesting strengthening demand over this period. For engineering associates, employment rose by 16.6 per cent in the May quarter 2009 compared with the same quarter in 2008, but over the year to May 2010 employment fell by 2.0 per cent.
- The Internet Vacancy Index for both engineers and engineering associates fell sharply during the global recession and although vacancy levels stabilised in the second

quarter of 2010 there has been little recovery. The Index for engineers rose by 3.0 per cent over the year to June 2010.

Labour market issues

- A key issue in these labour markets appears to be the highly specific requirements of employers who have advertised vacancies, and the large number of qualified, but unsuitable, applicants.

Resource Sector Professions and Associates

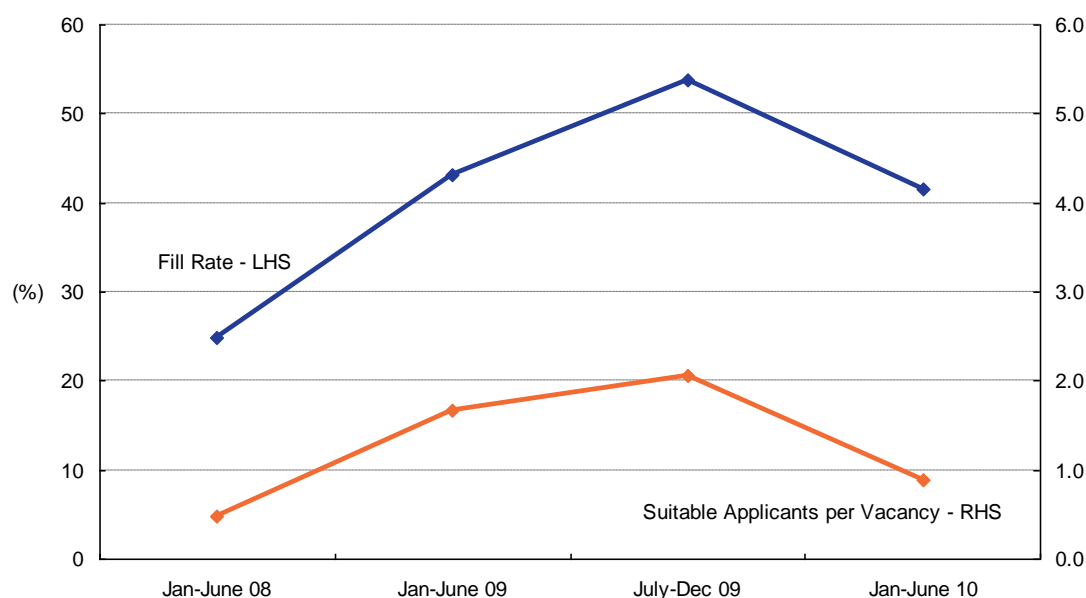
December 2009 – May 2010

Occupations in cluster	Rating
1335-13 Production Manager (Mining)	Shortage
2336-11 Mining Engineer (Excluding Petroleum)	Shortage
2336-12 Petroleum Engineer	Shortage
2344-11 Geologist	Shortage
2349-12 Metallurgist	No Shortage
3129-12 Metallurgical or materials technician	No Shortage
3129-13 Mine Deputy	No Shortage

Shortages have been apparent for many resource professions and associates over the past five years, but there was a significant downturn in these labour markets over the year to late 2009 and shortages abated. Research undertaken in early 2010, however, shows that while there has been a marked tightening in these labour markets overall, there is some variation in the recruitment experiences of employers across individual occupations.

Employers of mining, petroleum and mining production engineers and geologists generally experience difficulty filling vacancies. Despite the labour market for geologists being adequately supplied in 2009, shortages have re-emerged for these skills as resource sector activity has recovered.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Resource Sector Professions and Associates, 2008 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised. Includes data for the following occupations only: production manager (mining), mining engineer (excluding petroleum), petroleum engineer, geologist and mine deputy.

Survey results

- The number of candidates employers considered to be suitable varied across the states and also across occupations. Employers in New South Wales, Victoria and

Tasmania successfully filled some positions but other employers generally experienced great difficulty attracting suitable candidates.

- Overall, most employers who recently advertised for positions across the mining sector reported difficulty filling vacancies. This was partly due to candidates being considered to be unsuitable due to lack of specific skills or experience in particular types of mining.
- Employers of mining and petroleum engineers experienced the most difficulty recruiting for senior roles. The majority of surveyed production manager positions were senior roles and recruitment was also difficult for these positions.
- Recruitment of metallurgists was relatively easy with employers filling in excess of 80 per cent of surveyed vacancies in 2010. Employers of these occupations often required experience with metal flotation devices, sand separation, mineral sands and hydrometallurgy.

Why applicants were unsuitable

- Unsuitable applicants generally did not have appropriate skills or the level of experience sought by employers, particularly for senior roles.
- Employers recruiting geologists considered candidates to be unsuitable if they lacked the specific knowledge and skills required in the employer's industry setting.
- Location is a key factor in recruiting to this sector, with fly-in fly-out arrangements and high costs of accommodation in many mining locations. Some employers could not agree on locational and transport issues when negotiating employment conditions with prospective employees.

Demand and supply trends

- Employment in mining rose by 53.7 per cent in the five years to May 2010, creating 62 400 new jobs.
- Demand for skills in this sector is particularly strong and shortages are apparent not only in the professions covered in this cluster report but also for a number of trade skills such as construction, engineering and automotive.

Labour market issues

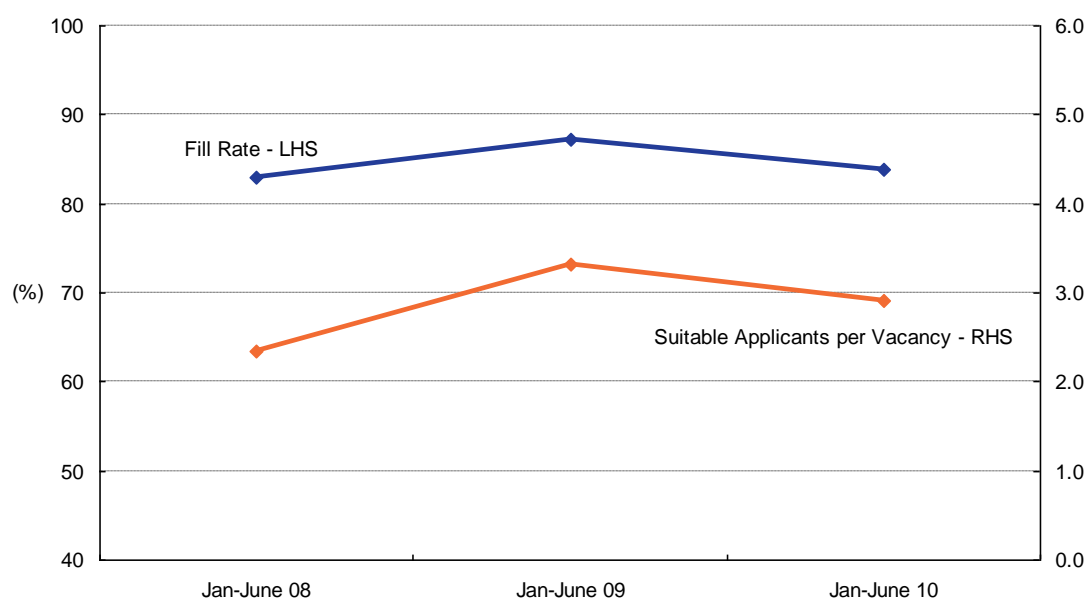
- Some contacts indicated that they have noticed an increased preference from employees for fly-in fly-out work in senior mining and metallurgical roles and this has impacted on employers' ability to fill permanent positions based on site.
- Most professionals working within the mining sector have internationally transferrable skills and it is not unusual for Australian citizens to leave the country for work opportunities overseas. Employer comments indicate that suitably qualified international candidates regularly apply for, and are recruited to, positions within the mining sector in Australia, particularly in engineering roles.
- The majority of mining employment is located outside state capital cities and most employers experienced difficulty recruiting people who were willing to relocate from their current place of residence.
- The National Resources Sector Employment Taskforce reported in mid 2010 on the workforce needs of the resource sector. The report is available at www.deewr.gov.au/skills/programs/national/nrset/pages/resourcingthefuturereport.aspx

Occupations in cluster	Rating
2411-11 Early Childhood (Pre-primary School)	Shortages are evident in the long day care sector
2412-13 Primary School Teacher	No shortage
2414-11 Secondary School Teacher	Recruitment difficulties are evident for some subject areas, notably maths and science teachers and for some Languages Other Than English (LOTE)
2415-11 Special Needs Teacher	Recruitment difficulties for teachers who have special needs qualifications and experience in particular fields

In recent years recruitment of school teachers has been relatively easy on the whole, with difficulties restricted to specific locations and specialisations. Shortages of early childhood teachers are evident in the long day care sector although supplies to the education sector are adequate. There are few difficulties recruiting primary school teachers and a more than adequate supply of these professionals is reported across both government and independent school sectors. Recruitment difficulties for secondary school teachers are restricted to specific subject areas, most notably maths and science, although some employers report difficulty recruiting for specific language teaching positions. Recruitment difficulties for special needs teachers are for qualified staff with particular experience.

It is generally harder to fill vacancies for school teachers in regional and remote areas. It is also evident that in some locations employers experience difficulty recruiting for relief teachers and for short-term contract positions.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, School Teachers, 2008 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised. Includes data for vacancies at non-government schools only.

Survey results

- For school teachers as a whole, the proportion of vacancies filled was consistently high across states and territories. Nationally, 85 per cent of vacancies were filled (noting state and territory education departments generally fill positions from applicant registers so surveyed vacancies are almost entirely in the non-government sector, with input from government education departments reflected in qualitative research findings) and there was an average of 3.3 suitable applicants per vacancy.
- For early childhood teachers the labour market varies between the long day care and education sectors. Employers in the school system generally received a good response to their advertisements for early childhood teachers and vacancies were easily filled. Employers in the long day-care sector experienced significant difficulty recruiting and generally attracted small numbers of suitable applicants. Contacts suggest the differences reflect more attractive leave, salary advancement and career opportunities on offer in the education sector.
- Employers recruiting primary school teachers experienced little difficulty filling vacancies. Advertisements attracted large fields of qualified candidates and education departments reported more than adequate numbers of primary school teachers registered for employment. This is consistent with survey results in recent years.
- Vacancies for secondary school teachers were also generally filled easily. However, significant recruitment difficulties were experienced nationally for specialised maths and science teachers. Difficulties were also experienced in some states and territories for teachers in other subject areas including technology, music and languages other than English (LOTE). These shortages are not, though, as widespread as those for maths and science, and research results suggesting there are significant differences across states in terms of specialist subject shortages.
- DEEWR research did not identify widespread shortages of special needs teachers. However, contacts suggested there are some recruitment difficulties for staff who have specialist qualifications and experience in areas such as teaching children with autism or behavioural difficulties.
- Employers in regional and rural areas generally experienced greater difficulty recruiting and retaining staff across all areas of teaching.
- Recruiting teachers for relief positions or on short term contracts also presented some difficulties for employers across teaching occupations.

Why applicants were unsuitable

- Apart from the early childhood sector, employers have consistently attracted a large number of suitable applicants per teaching vacancy over the past five years. Those who experienced difficulty were generally located in remote and regional areas or had very specific subject needs, sometimes combinations of subjects.
- Employers frequently commented that candidates were considered to be unsuitable because they did not have adequate communication skills. Some were unwilling to relocate to remote areas.
- The majority of unsuitable applicants for special needs teacher positions were qualified teachers who did not hold a specific special needs qualification or lacked relevant experience. This was particularly apparent in the fields of behaviour and autism.

Demand and supply trends

- Employment of school teachers increased slightly (up by 8.3 per cent) over the five years to May 2010 and at May 2010 employment of school teachers numbered around 335 600.

- Comments from state and territory departments of education indicate there are significant numbers of qualified teachers seeking employment across all teaching areas except in the field of special education. These agencies report little difficulty recruiting for government schools and most report adequate supplies of secondary teachers.

Labour market issues

- Recruitment and unfilled vacancies are cyclical and depend on the time of year hiring takes place. Mid-year recruitment generally attracts fewer applicants than end of year recruitment when teacher movements usually occur and new graduates enter the labour market.
- For short term vacancies of less than a school year, recruitment is generally more difficult and some employers note casual teachers required to cover staff absences at short notice are sometimes difficult to recruit.

Occupations in cluster	Rating
2346-11 Medical Laboratory Scientist	No Shortage
2511-11 Dietitian	No Shortage
2512-11 Medical Diagnostic Radiographer	Shortage
2512-12 Medical Radiation Therapist	Shortage
2512-14 Sonographer	Shortage
2514-11 Optometrist	Shortage
2515-11 Hospital Pharmacist, Retail Pharmacist	No Shortage
2521-11 Chiropractor	Recruitment Difficulty for chiropractors who have skills in specialised techniques or who have paediatric experience
2523-12 Dentist	Regional Shortage
2524-11 Occupational Therapist	No Shortage
2525-11 Physiotherapist	Shortage
2526-11 Podiatrist	Shortage
2527-11 Audiologist	Shortage
2527-12 Speech Pathologist	Regional Shortage

Shortages of health professionals have been persistent over most of the past decade. Occupations such as medical diagnostic radiographer and sonographer have been in shortage continually over that time and occupations including pharmacist and physiotherapist have been in shortage for nine of the past ten years. Significant shortages, however, have not been identified for dietitians or chiropractors.

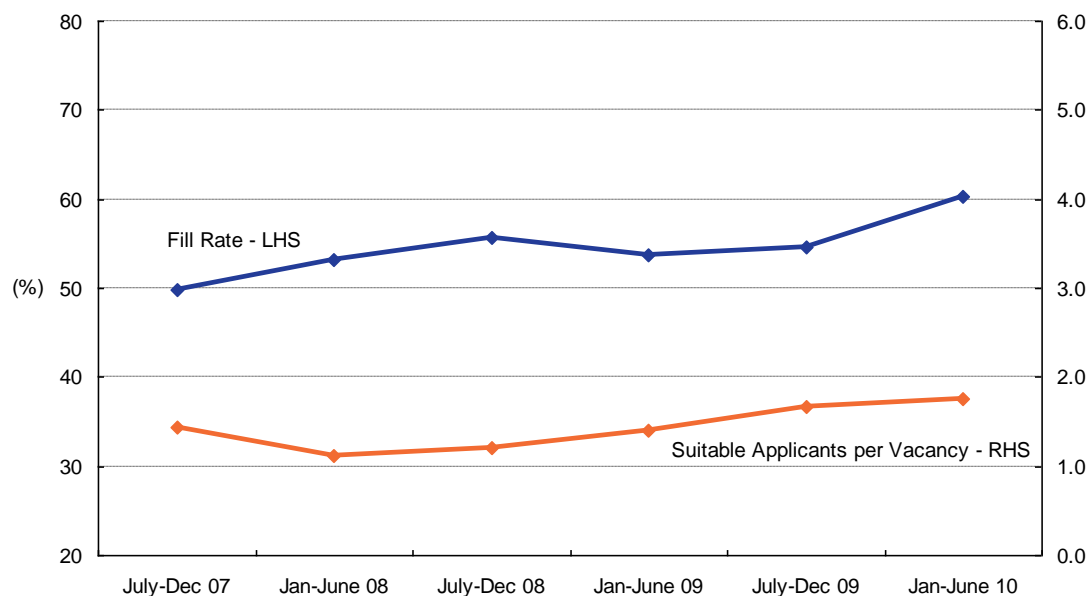
The labour market for the health professions did not change markedly during the recent economic downturn with shortages persisting despite lower demand for skilled workers generally. There has, however, been an easing in the labour market for some health professions over the past year due primarily to increased supply from domestic training courses. Regional employers experience particular difficulty recruiting health professionals.

Demand for health diagnostic and therapy professions is, though, expected to continue to be strong as the Australian population ages and developments in medical technology expand health care options.

Survey results

- On average, the proportion of vacancies for health diagnostic and therapy professions which were filled increased from about 50 per cent in mid to late 2007 to 60 per cent in the first half of 2010 indicating a slight easing in the labour market.
- Similarly, there was a slight rise in the number of suitable applicants per vacancy over the two years to 2010 (up from 1.1 to 1.8) reflecting both an increasing number of graduates entering the workforce and the number of overseas trained applicants.
- In 2010, the proportion of vacancies filled varied across these professions from 97 per cent for dietitian to less than 30 per cent for sonographer and audiologist.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Health Diagnosis and Treatment Professions, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised.

- The number of suitable applicants per vacancy also varied markedly across occupations. Employers seeking to recruit dietitians and pharmacists attracted 4.8 and 4.7 suitable applicants per vacancy respectively while employers recruiting sonographers and audiologists received an average of 0.4 suitable applicants per vacancy.
- Examining survey results across states and territories shows that the proportion of vacancies filled in most states and territories varied little from the national average. Notable, though, are the results for South Australia, where a significantly higher proportion of vacancies were filled (almost three quarters) and Western Australia where a lower proportion were filled (slightly more than 40 per cent).
- Employers seeking to recruit senior, experienced or specialist staff even in metropolitan areas experienced difficulty for most occupations. Large metropolitan public and private health sector employers were the most successful, while private practices generally found recruiting difficult.
- Employers in rural and regional Australia experienced significant difficulty attracting staff. Shortages of dentists are evident in regional areas in most states but employers in metropolitan locations experienced little difficulty filling their vacancies for dentists.

Why applicants were unsuitable

- Applicants were generally considered by employers to be unsuitable because they lacked appropriate qualifications and/or state and territory registration or membership of professional organisations.
- Lack of adequate experience was also a key factor contributing to applicants being considered to be unsuitable.
- Positions sometimes remained unfilled despite attracting interest from suitable applicants because employers and candidates could not agree on working hours and conditions.

Demand and supply trends

- Medicare Statistics for the March Quarter 2010 show consistent increases in health services per capita provided over 2007-08 and 2008-09 across occupations in this group, with the exception of dentistry and pharmaceutical. Pathology and diagnostic imaging services rose by 2.7 per cent, optometry by 5.6 per cent and radiation therapy by 32.4 per cent.
- Employment of health diagnostic and therapy professionals rose by 7.9 per cent over the year to May 2010 to almost 160 000, continuing the trend of long term growth in employment for these occupations.
- The DEEWR Internet Vacancy Index shows the level of vacancies for these professions was relatively unaffected by the global recession, continuing an upward trend. Vacancies rose by 2.9 per cent over the year to June 2010.
- Employer comments suggest that in some professions the number of graduates seeking employment is greater than the number of entry level positions available.
- Employers recruiting health professionals in rural and regional Australia experienced particular difficulty, with some employers advertising over extended periods with little or no response from suitably qualified and experienced practitioners. Most rural and regional employers prefer experienced staff due to their vacant positions being sole practitioner roles. However, some recruit graduates or overseas trained applicants when they fail to fill vacancies with more experienced local candidates.
- Due to the high proportion of females in this workforce employers noted that staff turnover can be high, and part-time and temporary employment are significant in these labour markets.

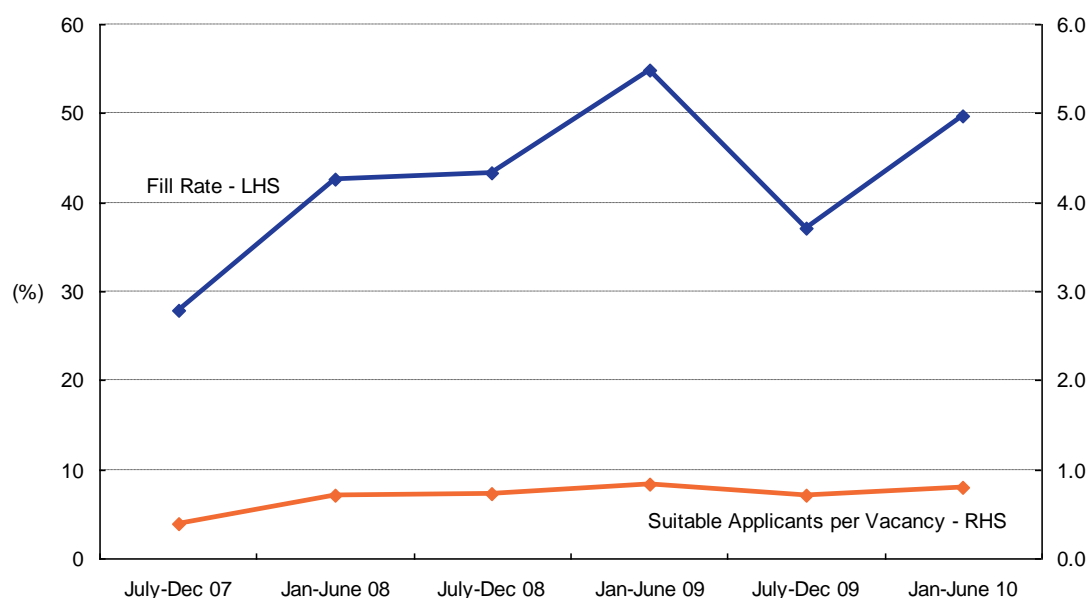
Labour market issues

- Although shortages are relatively widespread in the health diagnosis and treatment professions, particularly in rural and regional Australia, the labour markets for some health professions have eased over recent years, with increasing new supply from domestic training.
- For example, after persistent shortages of pharmacists over the decade to 2008, shortages are no longer widespread. Graduate positions generally attract large numbers of applicants and are readily filled. The easing in this labour market appears to be attributable in part to new training courses and higher graduate numbers.
- Demand is strong for senior and specialist health professionals and most unfilled vacancies required significant experience.
- Lack of Professional Development Year (PDY) training places for graduates in some professions and locations was raised by some employers as an issue of concern.

Occupations in cluster	Rating
2541-11 Midwife	Shortage
2544 Registered Nurses	Shortage
4114-11 Enrolled Nurse	Shortage

Relatively widespread shortages of both registered and enrolled nurses have been persistent over the past decade and the most recent research undertaken in June 2010 shows employers continue to experience significant difficulty filling nursing vacancies. The onset of the global recession had little effect on the labour market for nurses, with demand for qualified staff remaining strong.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Nurses, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised.

Survey results

- The labour market for registered and enrolled nurses and midwives has remained tight over the past year with a consistently low proportion of surveyed vacancies filled and few suitable applicants per vacancy. DEEWR research shows that in early 2010, half of the surveyed nursing vacancies were filled, similar to the proportion recorded as filled in the corresponding period in 2009.
- The majority of employers who had recently advertised reported difficulty filling positions. Employers were seeking qualified nurses and while experience was preferred, some employers indicated that they could provide training to suitably qualified applicants.
- There was an increase in the average number of applicants per vacancy from 2.3 in December 2009 to 3.5 in June 2010. However, the average number of suitable applicants per vacancy remained relatively steady at less than one. On average, there has been little change in the number of suitable applicants per vacancy since July 2007, indicating the persistence of shortages of these skills.

- Midwife vacancies were the most difficult of the nursing positions to fill, with less than 30 per cent of surveyed vacancies filled in June 2010. Some employers did not receive any applications for these positions, despite prominent advertising. Other employers noted an increase in the number of midwives seeking part-time work, despite positions being offered as full-time.
- Some employers, particularly those in regional and remote areas, indicated that they recruit nurses from overseas, as they are unable to attract and retain local staff.

Why applicants were unsuitable

- Employers considered applicants to be unsuitable because they lacked relevant qualifications or registration. Some employers, particularly in midwifery, assisted applicants to obtain registration with state nursing boards.
- Some employers considered applicants to be unsuitable because they lacked specific or sufficient experience, such as clinical or aged care experience.
- Employers commented that some unsuitable applicants lacked effective written or oral communication skills.
- Some surveyed vacancies required specialised experience, such as the ability to work independently in remote centres with diverse clients or running clinical trials. Senior nursing positions were also difficult to fill with employers reporting insufficient numbers of experienced nurses applying for these positions.

Demand and supply trends

- The DEEWR Internet Vacancy Index shows stable to slightly declining advertised vacancy levels over the two years to June 2010.
- Employment of registered and enrolled nurses and midwives increased strongly, by 30 700 (or 13.2 per cent) over the year to May 2010, to 263 200. Employment levels for nurses have risen over the last decade.
- Demand for health services is expected to increase over the coming decade, with population growth and an ageing population.

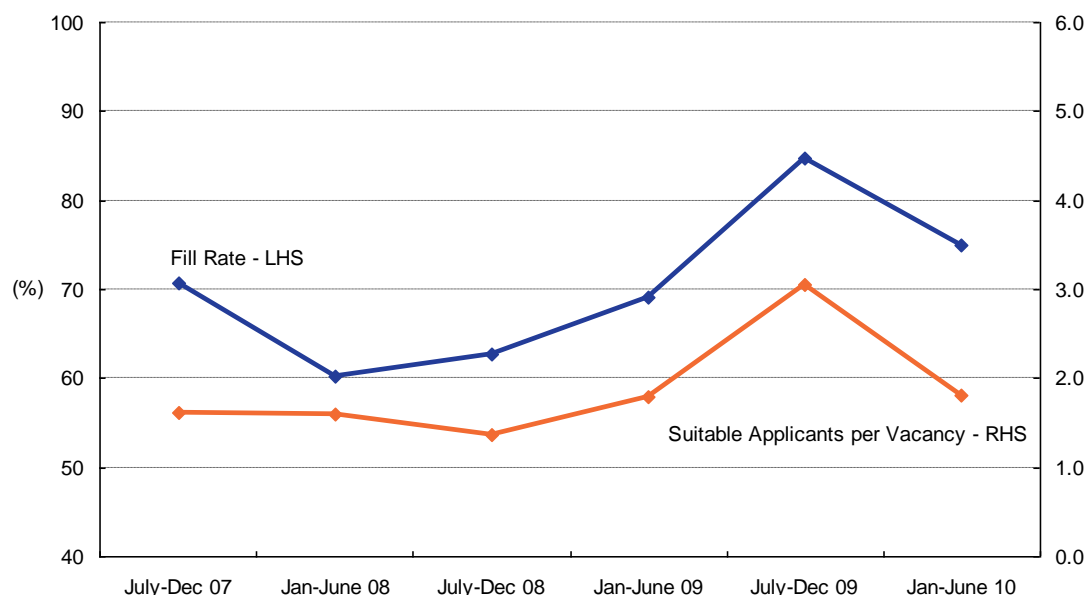
Labour market issues

- Employers in the aged care sector report increased difficulty recruiting qualified staff, and high staff turnover. They attribute this to relatively low remuneration and difficult working conditions.
- Some employers of midwives commented that the workforce is ageing and there will be increased demand to replace midwives who retire. This is confirmed by ABS Labour Force Survey data which indicate that the median age of midwives is 48 years and 56 per cent are aged 45 years and over.

Occupations in cluster	Rating
2721-15 Student Counsellor	No Shortage
2723-11 Clinical Psychologist	Shortage
2725-11 Social Worker	No Shortage
2726-13 Welfare Worker	No Shortage

Employers of social professionals, with the exception of clinical psychologists, have generally experienced little difficulty recruiting in recent years. Shortages are not widespread, although the labour markets for both social workers and welfare workers tightened noticeable in early 2010. Despite this, the vast majority of vacancies were filled and there were, on average, almost two suitable applicants per vacancy for these professions.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Social Professions, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised.

Survey results

- The labour market for social professionals eased over late 2008 and 2009 with the proportion of vacancies filled increasing and the number of suitable applicants per vacancy doubling. Since late 2009, though, the proportion of vacancies filled has fallen slightly and the number of suitable applicant numbers has declined to a similar level to that recorded in 2008.
- Employers overall, however, report little difficulty recruiting and the proportion of vacancies filled has been relatively high over the past three years, ranging from around 60 per cent in early 2008 to about 85 per cent in late 2009. The exception to this is clinical psychologist where employers in some states attracted low numbers of suitable applicants and were often unable to fill vacancies.
- Employers recruiting social professionals were generally seeking qualified and experienced applicants. Registration with professional organisations or association was also a prerequisite for some occupations such as clinical psychologist. Some

employers commented that they had noted an increase in the number of graduates applying for positions.

- In 2009-10, on average, more than three quarters of surveyed vacancies were filled and there were two suitable applicants per vacancy.
- Victoria and Queensland had the highest proportion of social profession vacancies filled with 90 and 85 per cent respectively. The proportion of vacancies filled in most other states was in line with the average, however, recruitment was slightly more difficult in Western Australia, where around 65 per cent of vacancies were filled.

Why applicants were unsuitable

- The main reasons employers considered applicants to be unsuitable were lack of experience and lack of specialised skill sets, such as knowledge and experience in drug and alcohol work, mental health issues or working with the homeless.
- Some employers considered new graduates to be unsuitable due to lack of experience.

Demand and supply trends

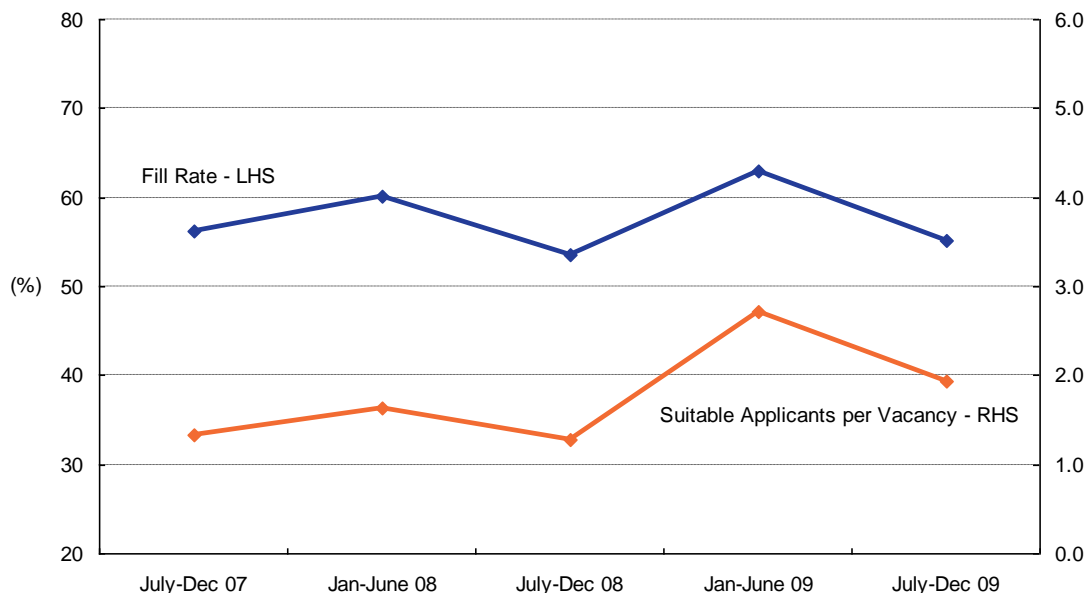
- It is difficult to estimate employment change for these individual professions as data are only available at the aggregated level for counsellors, social workers and welfare, recreation and community arts workers. However, examination of employment levels for these groups suggests employment is increasing strongly, with each of these aggregated groups recording employment growth in excess of 25 per cent over the five years to May 2010.

Occupations in cluster	Rating
2341-11/12 Agricultural Scientist/Consultant	Shortage
3111-11 Agricultural Technician	Shortage
3612-11 Shearer	No Shortage (March 2010)
3622-11 Gardener (General)	No Shortage
3622-12 Arborist	Shortage
3622-13 Landscape Gardener	Shortage
3623-11 Greenkeeper	No Shortage
3624-11 Nurseryperson	No Shortage

The occupations in this cluster are diverse but are grouped together as they relate to agricultural and horticultural activities. Consequently, demand factors vary across the occupations but include the influence of drought, the number of sporting venues requiring greenkeeping services and general economic conditions.

Shortages of agricultural scientists and consultants have been identified over the past few years as have shortages of landscape gardeners who have trade level qualifications and experience in both hard and soft landscaping. For other occupations in this cluster significant shortages have not been apparent or have been intermittent.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Agriculture and Horticulture Trades, 2007 to 2009



Source: DEEWR Survey of Employers who have Recently Advertised.

Survey results

Agricultural Scientist/Consultant and Technician

- It is difficult to determine overall trends in the labour market for these occupations as the proportion of vacancies filled and the number of suitable applicants per vacancy

are based on a relatively small number of employer contacts and the employment experience of organisations recruiting varies significantly across specialist positions.

- Overall, though, about two thirds of vacancies surveyed for agricultural scientists/consultants and technicians were filled in late 2009, a slight fall compared with 2008.
- The number of suitable applicants per vacancy remained low in late 2009, slightly more than one per vacancy, compared with almost two in 2008, and shortages persist.
- Variations in the proportion of vacancies filled were apparent across states. Employers in some states filled all their vacancies but employers in New South Wales and Western Australia filled about half their vacancies.
- The number of suitable applicants per vacancy also varied in late 2009, from 0.8 suitable applicants per vacancy in New South Wales to in excess of two per vacancy in Western Australia and Tasmania.

Agricultural and Horticultural Trades

- The proportion of vacancies filled for agricultural and horticultural trades was relatively stable over late 2007 and early 2008, but the labour market tightened a little in late 2008.
- There was a marked increase in the number of suitable applicants per vacancy in early 2009, and a slight rise in the proportion of vacancies filled, suggesting an easing in the labour market at that time.
- More recent surveys, though, show the number of suitable applicants per vacancy has fallen slightly, but remains above that recorded prior to the onset of the global recession.
- The recruitment experience of employers varied considerably across states in late 2009, with about one quarter of vacancies filled in the Australian Capital Territory compared with more than 80 per cent filled in Tasmania.
- In most states there were between 1.6 and 2.2 suitable applicants per vacancy but in Tasmania there were 3.5 and in the Australian Capital Territory there were just 0.6.

Why applicants were unsuitable

- Generally across the agricultural and horticultural occupations, applicants who were considered by employers to be unsuitable did not have the level of qualification sought or lacked experience.
- In some trade occupations, employers also mentioned poor quality of work and lack of breadth of skills as reasons for applicants being considered unsuitable.

Demand and supply trends

- Employment of agricultural scientists, consultants and technicians has been relatively steady in recent years, totalling around 9000. Employment of agriculture and horticulture tradespersons increased by nearly 10 per cent in the year to May 2010, to nearly 85 000.
- Agricultural conditions and sheep numbers affect demand for agricultural specialists. There has been increasing demand for skilled workers in this sector as much of Australia recovers from drought and the effects of the global recession. Historically low sheep numbers in 2009 limited demand for shearers but recent rainfall in eastern states suggests numbers are likely to improve in coming years.
- The Australian Bureau of Agriculture and Resource Economics' Australian Commodities June 2010 forecast suggests the value of farm exports is expected to increase by 2.5 per cent to \$29.1 billion in 2010-11, following an estimated decline of 11.6 per cent in 2009-10.

- Employers of agricultural scientists, consultants and technicians noted the ageing workforce will mean higher demand to replace workers expected to retire over the next decade. ABS 2006 Census data shows more than a quarter of the combined workforce was aged over 50 years.
- Recent higher education data shows completions in agriculture related courses were relatively stable over 2004 to 2008.
- For trades occupations in this cluster there is significant variation in the proportion of the employed workforce holding trade level qualifications. Three quarters of shearers do not hold post-school qualifications, but for arborists the figure is just one third.
- National Centre for Vocational Education Research data shows trends in training completions vary across these trades occupations, with a rise in the number of landscape gardening and arborist completions at the Certificate III level over recent years but generally declining numbers for other trades.

Labour market issues

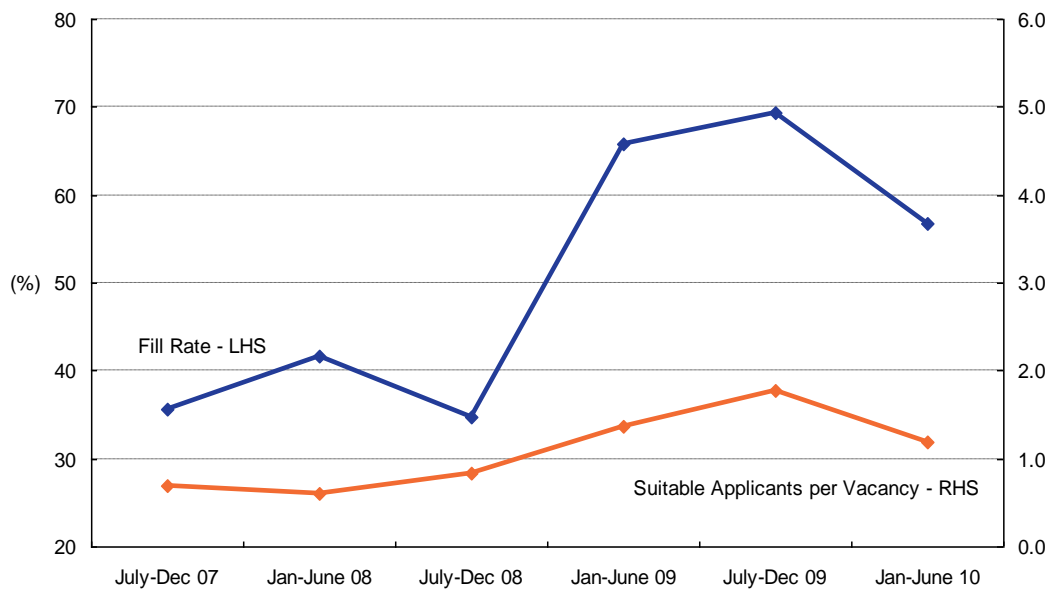
- Demand for agricultural scientists, consultants and technician is expected to continue to be strong due to retirements, improving agricultural conditions and growth in farm exports.

Occupations in cluster	Rating
3211-11 Automotive Electrician	Shortage
3212-11 Motor Mechanic	Shortage
3212-12 Diesel Mechanic	Shortage
3212-13 Motorcycle Mechanic	Shortage
3212-14 Small Engine Mechanic	No Shortage
3241-11 Panelbeater	Shortage
3242-11 Vehicle Body Builder	No Shortage
3242-12 Vehicle Trimmer	Shortage
3243-11 Vehicle Painter	Shortage

Shortages of automotive tradespersons have been relatively persistent over the past decade. Wastage from these occupations is relatively high and although there was a substantial easing in automotive trades labour markets from late 2008, demand has recovered and employers recruiting in early 2010 experienced greater difficulty attracting the skills they needed than they did in 2009.

Shortages have once again become relatively widespread across these trades although the proportion of vacancies filled in 2010 remains notably higher than the level recorded over 2007 and 2008.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Automotive Trades, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Survey results

- Employers surveyed in early 2010 experienced difficulty filling positions for the majority of the automotive trades, across all states and territories.
- There was a notable tightening in the labour market between the second half of 2009 and the first half of 2010. The proportion of vacancies filled fell from nearly 70 per cent

to less than 60 per cent. The average number of applicants per vacancy considered by employers to be suitable also fell, from 1.8 to 1.2.

- Both the proportion of vacancies filled and the number of suitable applicants per vacancy remain somewhat higher than the levels recorded prior to the recession. Over 2007 and 2008 the proportion of vacancies filled ranged between about 35 and 45 per cent, and, on average, there was less than one suitable applicant per vacancy. By contrast, in 2010, about two-thirds of vacancies were filled and there was slightly more than one suitable applicant per vacancy.
- Overall, there was some variation in survey results between the states and territories, with the proportion of vacancies filled in the Northern Territory (about one third) notably lower than in other states and territories.
- All states and territories recorded relatively low numbers of suitable applicants per automotive trade vacancy.

Why applicants were unsuitable

- Most employers were seeking applicants with formal qualifications and generally preferred applicants to have at least two years post-apprenticeship experience.
- Less than one fifth of applicants were considered by employers to be suitable. Unsuitable applicants generally did not possess formal qualifications or they lacked the specific experience required.
- The kind of experience required by employers varied. Some were seeking staff with experience working on particular makes and models of cars, or particular specialist skills or experience working on air-conditioning, motorcycles or heavy vehicles and buses. In contrast, some employers were seeking employees with wide ranging experience and sound general mechanical skills.

Demand and supply trends

- Nationally, around 140 000 people were employed in the automotive trades in May 2010. Employment peaked in November 2008 at nearly 150 000 but fell by 17.4 per cent over the following year. Employment levels began to pick up again from late 2009, however they have not returned to pre-recession levels.
- The DEEWR Internet Vacancy Index shows advertised positions declined by around one third in 2009 compared with 2008. Vacancy levels rose slightly in the first six months of 2010, but remain below the levels recorded in 2008.
- Demand for automotive tradespeople relates to the stock and age of motor vehicles. Data from the ABS Motor Vehicle Census shows the number of registered motor vehicles increased by more than 16 per cent in the five years to March 2009.
- Wastage appears to be a significant drain on the supply of automotive trades, with employers commenting that the work can be physically demanding and dirty and workers are often able to obtain higher wages in other industries.

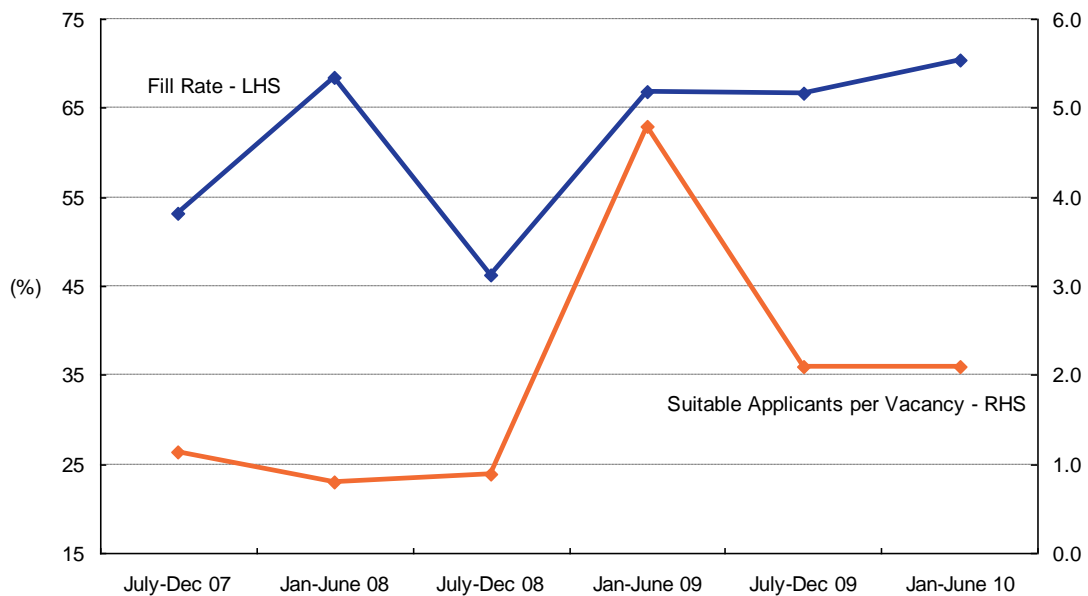
Labour market issues

- Employers frequently cited the higher wages available to workers in the resources, construction and energy industries, either using their automotive trade skills or undertaking relatively low skilled work, as a barrier to attracting and retaining staff.
- Some employers of panelbeaters and vehicle painters commented that the pricing structure in the crash repair sector limits their ability to increase wages to retain staff.

Occupations in cluster	Rating
3222-11 Sheetmetal Trades Worker	Shortage
3223-11 Metal Fabricator	No shortage
3223-13 Welder (First Class)	No shortage
3231-11 Aircraft Maintenance Engineers (Avionics)	Shortage
3231-12 Aircraft Maintenance Engineers (Mechanical)	Shortage
3232-11 Fitter (General)	No shortage
3232-12 Fitter and Turner	No shortage
3232-13 Fitter-Welder	No shortage
3232-14 Metal Machinist	No shortage
3233-13 Locksmith	Shortage
3234-12 Toolmaker	No shortage

Shortages of engineering tradespersons have been relatively persistent over the past decade. The labour market eased notably in the first half of 2009 with the onset of the global recession and shortages abated for most engineering trades. However, the labour market for aircraft maintenance engineers and locksmiths remained tight throughout the global recession, while other trades such as sheetmetal trades workers have returned to shortage with the economic pickup.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Engineering Trades, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Survey results

- The labour market for engineering trades has tightened somewhat over the past year. There were only half as many suitable applicants per vacancy in April 2010 as there were a year earlier, down from 4.8 to 2.1. The number of suitable applicants per vacancy remains higher, though, than that recorded in the first half of 2008 prior to the onset of the global recession.

- Despite this, the proportion of vacancies filled remains relatively high (about 70 per cent), although some employers, particularly in regional areas, were unable to fill vacancies despite extensive advertising.
- The labour market for engineering trades has not returned to pre-recession conditions. The proportion of vacancies filled remains above that recorded in late 2008 (about 70 per cent now compared with less than 50 per cent), while the average number of suitable applicants is more than double (2.1 compared with 0.8).
- Most employers advertised for qualified and experienced applicants. However, some employers noted that while qualifications were desirable, relevant work experience and favourable work histories were of primary importance.
- Some employers, particularly those employing sheetmetal workers, locksmiths and aircraft maintenance engineers, commented that it is increasingly difficult to recruit senior tradespeople, that is, those with 5 to 10 years of relevant experience.
- Employers in Victoria and Tasmania had the least difficulty filling vacancies, filling 77 per cent and 81 per cent respectively. Some employers attributed this to the effect of the global recession on manufacturing and mining. Employers in the Northern Territory had difficulty filling vacancies despite attracting the highest average of suitable applicants per vacancy (3.1). Some employers attributed this to their remote locations and the difficulty finding suitable accommodation.
- Employers of welders, metal fabricators, toolmakers and fitters generally experienced the least difficulty filling vacancies in the first half of 2010.

Why applicants were unsuitable

- Employers primarily considered applicants to be unsuitable because they lacked qualifications or relevant experience. Some employers also sought specialised skills or experience, such as aluminium welding or stainless steel manufacturing.
- Some employers noted that unsuitable applicants had inadequate communication skills.
- Employers were sometimes averse to recruiting interstate and overseas-based applicants if they were unwilling to relocate at their own expense, although many of these applicants held appropriate skills and qualifications.
- Some employers were unable to fill vacancies, despite finding suitable applicants, as they were unable to agree with prospective employees on wages and conditions.

Demand and supply trends

- The DEEWR Internet Vacancy Index (IVI) shows there was a significant fall in the level of advertised vacancies for engineering trades over the year to December 2009. Vacancy levels have rebounded, although they remain well below those evident before the global recession.
- Employment of engineering tradespeople numbered 221 200 in May 2010 an increase of about 4.0 per cent compared with May 2009, and a similar level to that recorded in May 2008.
- Some employers, particularly in Western Australia and Queensland, expect increasing demand for engineering tradespeople over the coming year as new mining and construction projects come online.

Occupations in cluster	Rating
3311-11 Bricklayer	No Shortage
3311-12 Stonemason	Shortage
3312-12 Carpenter	No Shortage
3312-13 Joiner	Shortage
3321-11 Floor Finisher	Shortage
3322-11 Painting Trades Worker	No Shortage
3331-11 Glazier	Shortage
3332-11 Fibrous Plasterer	Shortage
3332-12 Solid Plasterer	No Shortage
3333-11 Roof Tiler	Shortage
3334-11 Wall and Floor Tiler	No Shortage
3341-11 Plumber (General)	Shortage
3341-12 Airconditioning and Mechanical Services Plumber	No Shortage
3341-13 Drainer	No Shortage
3341-14 Gasfitter	Shortage
3341-15 Roof Plumber	No Shortage
3941-11 Cabinetmaker	No Shortage

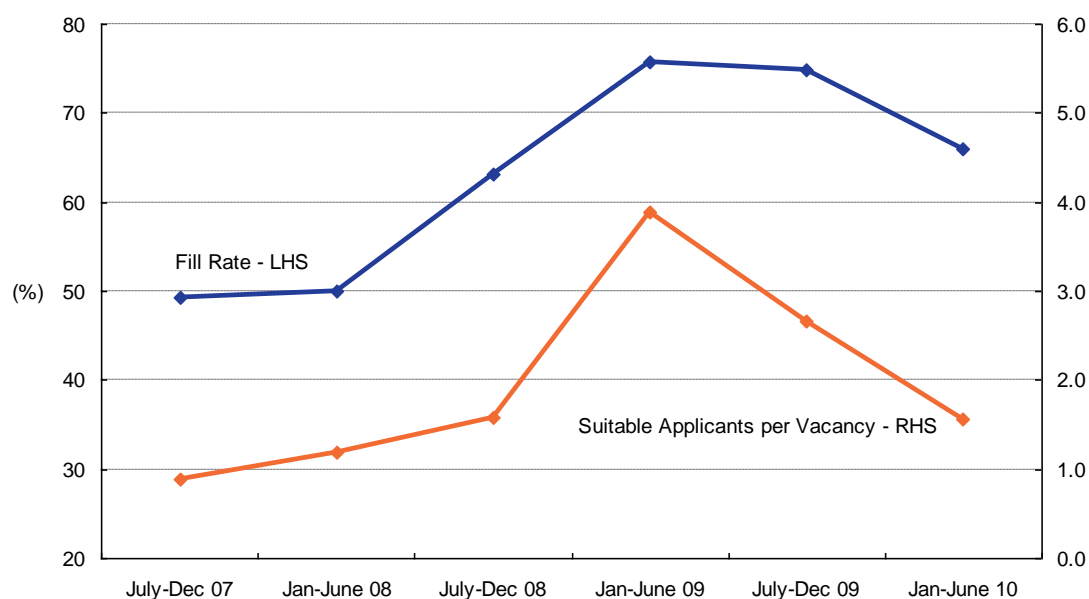
Relatively widespread shortages of construction trades workers persisted prior to the global recession of 2009. However, over late 2008 and 2009 there was a noticeable easing in these labour markets. Research undertaken in the first quarter of 2010 indicates demand has increased for most occupations in this group in line with economic recovery and increased building activity and shortages are becoming more widespread.

There is, however, a large degree of variance in the labour markets across the construction trades. Despite relatively strong demand overall, recruitment is easier than it was prior to the global recession for around half the construction trades. Skill shortages have persisted in plumbing, but, despite some tightening, the labour markets for bricklayers and carpenters remain soft compared with pre recession levels and shortages are not widespread in these trades.

Survey results

- In February 2010 both the proportion of vacancies filled and the number of suitable applicants per vacancy continued to decrease from their high a year earlier. There was a 10 percentage point fall in the proportion of vacancies filled to 66 per cent, and a decline in the number of suitable applicants per vacancy from 3.9 to 1.6.
- While the labour market for construction trades workers has tightened, February 2010 survey results indicate recruitment is easier than it was prior to the global recession. In 2010, 66 per cent of vacancies were filled (compared with around 50 per cent) in late 2007 and early 2008 and there were 1.6 suitable applicants per vacancy (compared with less than one in late 2007).

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Construction Trades, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

- There was significant difference between occupations in this cluster in terms of employers' recruitment experience. Employers seeking roof plumbers filled almost 90 per cent of their vacancies, but employers of joiners filled just one in five vacancies. Similarly, employers recruiting joiners attracted just 0.2 suitable applicants per vacancy on average while those seeking glaziers attracted 2.4.
- Of the largest trades that make up this group the research found only two, fibrous plasterer and plumber, to be in national shortage.
- There was noticeable variation in survey results across the nation in early 2010. Employers in Queensland and Western Australia filled the vast majority of their vacancies (82 per cent and 78 per cent respectively) but employers in the Northern Territory and Tasmania experienced greater difficulty, filling less than half.
- The number of suitable applicants per vacancy also varied, although there were less than two for all but Western Australia, where there were 2.1. In line with the low proportion of vacancies filled in Tasmania and the Northern Territory, there was just one suitable applicant per vacancy on average.

Why applicants were unsuitable

- The majority of employers surveyed regarded experience and expertise as being as important as formal qualifications when hiring construction trade workers.
- Although many employers required applicants to have trade qualifications, they considered applicants to be unsuitable primarily because they lacked specific experience or skill sets. This was not the case in the plumbing trades however, where qualifications and licensing are required.
- Some employers also suggested reliability is a key issue in this labour market and they regarded a number of applicants as being unsuitable as they did not have a good employment history.
- Employers in several occupations mentioned they received many applications from general labourers who lacked the required skills for the advertised vacancies. Overall, around 75 per cent of applicants were considered to be unsuitable.

Demand and supply trends

- Employment of construction trades workers numbered around 380 300 in May 2010, a fall of 1.4 per cent over the year but 5.2 per cent higher than five years earlier.
- The DEEWR Internet vacancy Index shows that despite some recovery from the low levels of late 2009 the level of advertised vacancies for construction trades in 2010 is well below that recorded in 2007.
- Residential construction activity is a key driver of employment for the construction trades. ABS data indicate activity in this sector grew strongly in the year to February 2010, with total residential building approvals increasing by 50 per cent over this time.
- Data from the Australian Industry Group/Australian Constructors Association shows the value of engineering and commercial construction rose by a subdued 1.5 per cent over 2009-10.
- Activity figures show demand was relatively low over 2009-10 and employment declined. However, the Australian Industry Group/Australian Constructors Association *Construction Outlook* suggests a rise in the growth in total turnover from Construction work in 2010-11, suggesting shortages are likely to broaden.

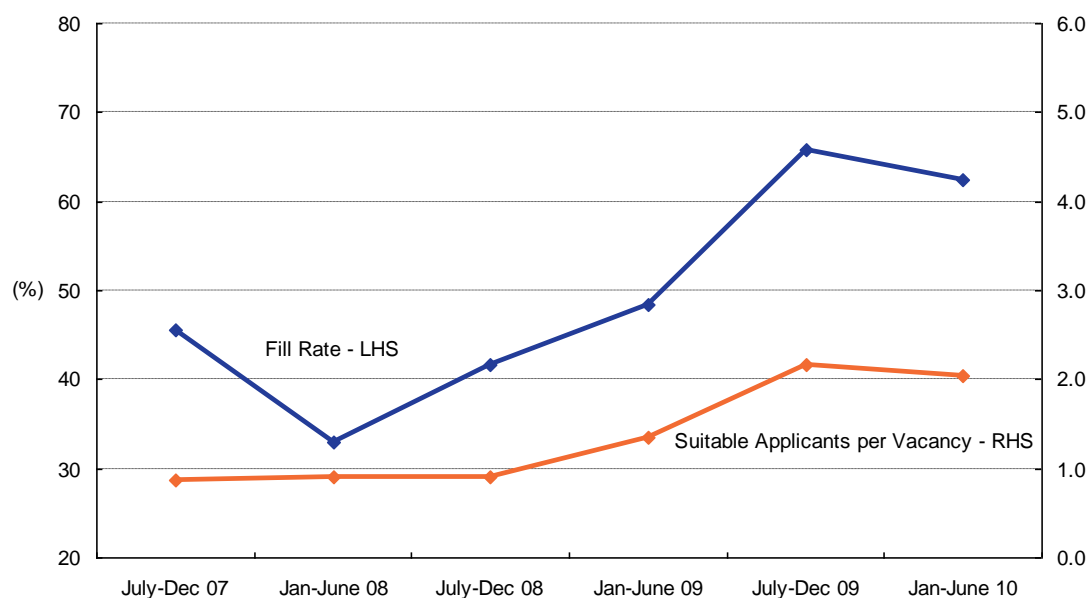
Electrotechnology and Telecommunications Trades

First quarter 2010

Occupations in cluster	Rating
3411-11 Electrician (General)	No Shortage
3411-13 Lift Mechanic	Shortage
3421-11 Airconditioning and Refrigeration Mechanic	Shortage
3422-11 Electrical Linesworker	Shortage
3423-11 Business Machine Mechanic	Recruitment difficulties exist for employers requiring staff with experience on a particular brand of equipment
3423-13 Electronic Equipment Trades Worker	No Shortage
3423-14 Electronic Instrument Trades Worker (General)	No Shortage
3424-11 Cabler (Data and Telecommunications)	Shortage
3424-13 Telecommunications Linesworker	Shortage
3424-14 Telecommunications Technician	No Shortage

This is a diverse group of trades occupations which have differing demand determinants and industry bases. Shortages of electricians and airconditioning and refrigeration mechanics have persisted over much of the past decade, but the labour market for other trades in this cluster has been more variable and in early 2010 shortages were patchy.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Electrotechnology and Telecommunications Trades, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Survey results

- Results of surveys for this cluster of occupations show a significant easing in the labour market from early 2008 to late 2009 with both the proportion of vacancies filled and the number of suitable applicants per vacancy rising markedly over that time.

- In early 2010 there was a slight tightening in this labour market in line with economic recovery, but overall employers found it easier to recruit skilled electrotechnology and telecommunications trades workers than they did in early 2008 and shortages were restricted to a small number of occupations.
- Between early 2008 and late 2009, the proportion of vacancies filled rose from about 33 per cent to around 66 per cent. The increase in the number of suitable applicants more than doubled over this period.
- State comparisons show that the experience of employers varies across the states and territories, with employers in the Australian Capital Territory and Tasmania filling about half their surveyed vacancies in 2009-10 and employers in Victoria, Queensland and the Northern Territory filling around three quarters.
- In terms of suitable applicants there was also some variation across states, with Victorian employers attracting more than three per vacancy on average compared with Tasmanian employers who attracted just one.
- Differences in the labour market across occupations in this cluster are particularly noticeable. Almost 90 per cent of vacancies for electricians surveyed in early 2010 were filled and there were more than five suitable applicants per vacancy. For telecommunications linespersons, just half the surveyed vacancies were filled and there were 1.5 suitable applicants per vacancy. A similarly tight labour market was evident for electrical linespersons, with less than one suitable applicant per vacancy and 62 per cent filled.

Why applicants were unsuitable

- Applicants who lacked qualifications were generally assessed as being unsuitable
- In addition, applicants for positions requiring specialist skills or experience such as those for business machine mechanic and telecommunications trades were often considered by employers to be unsuitable because they lacked specialist skills. These skills included knowledge of particular equipment, computer and programming skills data-cabling, fire and security systems, high voltage and live systems knowledge.
- Overseas-based applicants were generally considered to be unsuitable because they could not immediately meet local licensing and accreditation requirements.
- Employers in regional locations generally experienced difficulty attracting suitable applicants.

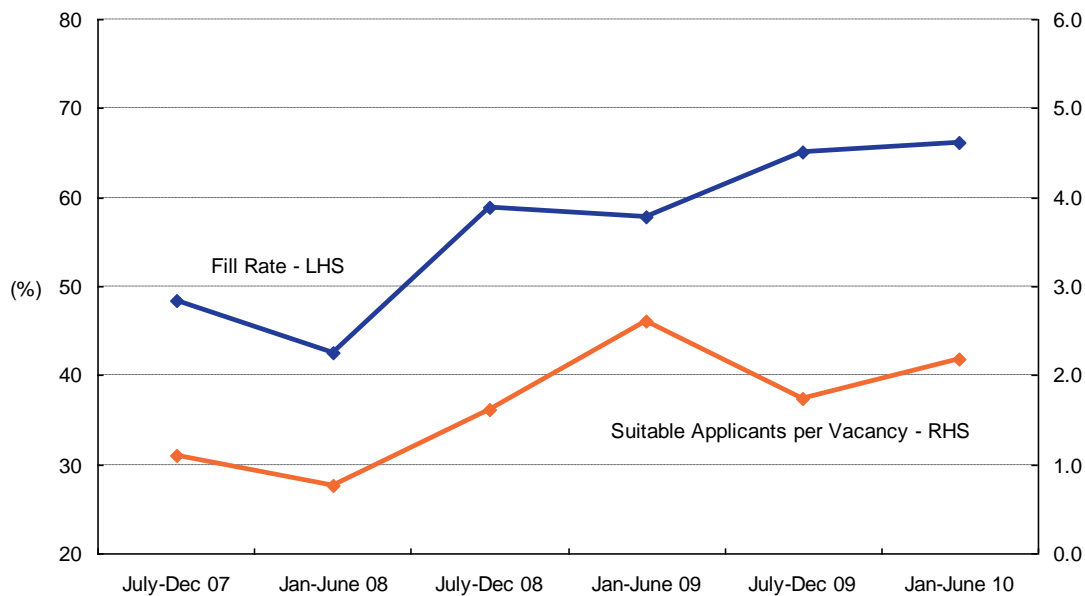
Demand and supply trends

- Employment increased over the year to May 2010, up by 5.0 per cent to 234 800. Over the five years to May 2010 employment grew strongly, rising by 22.6 per cent.
- The DEEWR Internet Vacancy Index for these trades has shown only slight recovery from the recession low, rising by 9.0 per cent over the year to June 2010.
- There is expected to be increasing demand for electrotechnology and telecommunications trades workers for the planned installation of the National Broadband Network throughout Australia.

Occupations in cluster	Rating
3511-11 Baker	Shortage
3511-12 Pastrycook	Shortage
3512-11 Butcher and Smallgoods Maker	Shortage
3513-11/3514-11 Chef/Cook	Shortage

Shortages in the food trades have been persistent over the past decade. Despite some improvement in the proportion of surveyed vacancies filled in 2010, shortages persist and are most prevalent in regional areas.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Food Trades, 2007 to 2010



Source: DEEWR Survey of Employers who have Recently Advertised

Survey results

- Employers surveyed for this report were engaged in a diverse range of businesses including large bread and meat manufacturers, retail supermarkets, independent butchers and bakeries, hotels, restaurants and cafés.
- The proportion of vacancies filled has been rising almost continually since early 2008 suggesting there has been some easing in these labour markets. About two-thirds of surveyed vacancies were filled in early 2010, up from slightly more than 40 per cent two years earlier. Nonetheless, employers continue to experience difficulty recruiting and retaining skilled, experienced and qualified workers, and shortages persist.
- The number of suitable applicants per vacancy has been variable, though there were significantly more suitable applicants per vacancy in 2010 than there were two years earlier (2.2 compared with less than one).
- There was only slight variation in the proportion of vacancies filled across these food trades in early 2010, with between 60 and 65 per cent filled for all trades except baker. The results for baker are interesting, with the proportion of vacancies filled jumping from about 50 per cent in late 2009 to about 75 per cent in early 2010 and being

accompanied by a marked increase in the number of suitable applicants per vacancy from 1.4 to 2.2.

- For food trades overall, there were in excess of two suitable applicants per vacancy in 2010 but butcher positions attracted a lower number of suitable applicants per vacancy, 1.6.
- State comparisons show that there is wide variation in the proportion of food trades vacancies filled across the country, ranging from 56 per cent in the Australian Capital Territory to 83 per cent in the Northern Territory.
- Regional employers, on the whole, recorded greater difficulty filling vacancies than their metropolitan counterparts.
- Some regional employers reported difficulty competing with the higher remuneration offered by the mining industry.

Why applicants were unsuitable

- Employers reported the main reasons applicants were considered to be unsuitable were lack of adequate and relevant experience, and lack of trade-level qualifications.
- In some trades within this group, employers commented that some qualified applicants have been employed in work environments where they have not experienced the full range of trade skills (supermarket bakeries and butcheries in particular). Some employers, particularly those in specialist retail businesses, consider these applicants to be unsuitable.
- Poor communication skills was another reason applicants were considered by employers to be unsuitable.
- For chef/cook positions, some restaurants attracted applications from qualified chefs, but applicants did not meet their expectations of standards.
- Some employers of chefs/cooks also attracted applications from qualified and experienced candidates but their experience did not match the style of cuisine offered by the restaurant.
- Employers in some regional locations also experienced recruitment difficulty, for example, when suitable candidates decided not to relocate to take up a position or withdrew for personal reasons.

Demand and supply trends

- Employment of food trades fell by 2.4 percent over the year to May 2010 to 150 800. Over the five years from May 2010, though, employment rose by 13.7 per cent.
- Trend indicators prepared by the ABS indicate that quarterly growth in café restaurant and takeaway turnover has been modest but has recovered from negative figures in the June and September quarters of 2008 to steady growth rates since then, suggesting strengthening demand for chefs and cooks following the global recession.
- The DEEWR Internet Vacancy Index for food trades fell by 2.5 per cent over the year to June 2010 and vacancies remain at historically low levels.

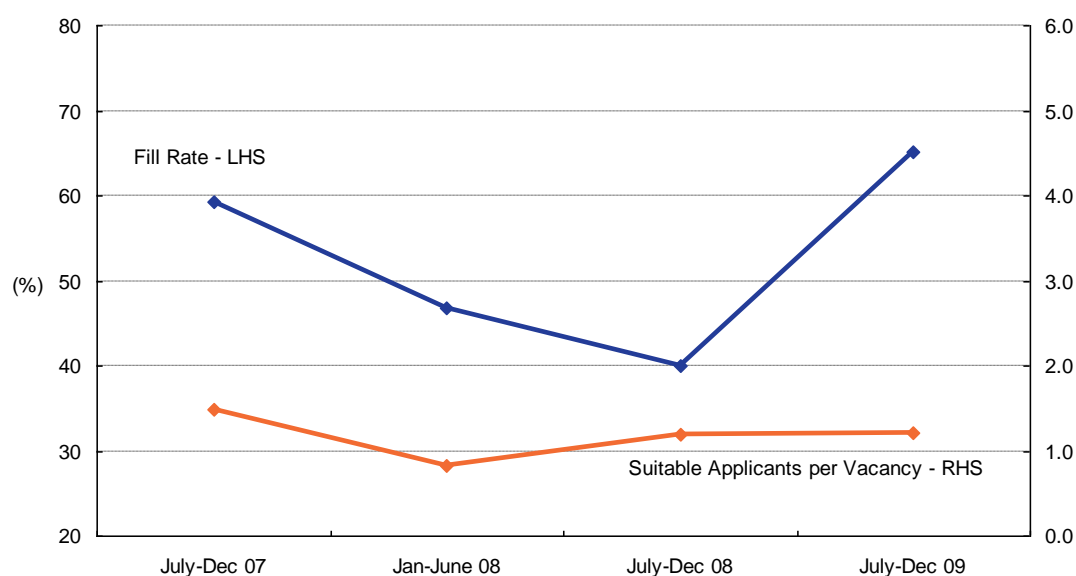
Labour market issues

- Wastage is a key issue in these labour markets. Employers suggest there is significant wastage from these occupations due to the hours of work (which can include very early starts in the morning, split shifts to cover lunch and dinner needs and weekend work) and perceptions of low remuneration.

Occupations in cluster	Rating
1341-11 Child Care Centre Manager	Shortage
4211-11 Child Care Worker	Shortage
4211-14 Out of School Hours Care Worker	Shortage

Shortages in child care occupations have been persistent over the past decade. Research undertaken in late 2009 shows employers continue to experience difficulty recruiting suitably qualified and experienced child care workers.

Proportion of Vacancies Filled and Number of Suitable Applicants per Vacancy, Child Care Occupations, 2007 to 2009



Source: DEEWR Survey of Employers who have Recently Advertised

Survey results

- The majority of employers surveyed reported difficulty recruiting.
- In late 2009 two thirds of surveyed vacancies were filled, an increase of more than 50 per cent compared with 12 months earlier.
- Although the proportion of vacancies filled increased, the rise was not accompanied by a rise in the number of suitable applicants per vacancy. The average number of suitable applicants per vacancy has varied little over the past few years, hovering around one.
- On average, 65 per cent of vacancies were filled, but the proportion varied widely across the states and territories. All surveyed vacancies were filled in South Australia and a relatively high proportion was filled in New South Wales and Victoria, but less than half the surveyed vacancies were filled in Tasmania and Western Australia.
- The number of suitable applicants per vacancy varied only slightly across most states, although in South Australia there were 2.1 suitable applicants per vacancy.
- The proportion of vacancies filled and the number of suitable applicants per vacancy was, though, relatively consistent across the occupations in this cluster.
- Employers were generally seeking qualified and experienced applicants for their vacancies. Qualification levels varied across occupations with senior positions such as

child care centre managers, requiring degree qualifications and child care workers and out of school hours care workers generally requiring diploma or certificate level qualifications.

Why applicants were unsuitable

- Most applicants who were considered to be unsuitable lacked relevant qualifications and experience.
- Employers placed significant value on diploma level qualifications for child care worker positions.

Demand and supply trends

- Employment in child care occupations rose by more than 20 per cent in the five years to May 2010, to 115 000.
- Data from the 2006 Census indicates that over 40 per cent of child care workers do not hold post-school qualifications. Changes to child care worker regulations are, however, resulting in higher demand for qualified workers.
- Some employers commented there is high staff turnover reflecting stress, relatively low pay and the physically and emotionally demanding nature of the work.
- Employers of out of school hours care workers commented the split shift nature of employment contributed to the difficulty attracting applicants. Many employers reported they had advertised vacancies multiple times due to difficulty attracting suitable applicants.

