Department of Education and Early Childhood Development

Victorian Training Market Report 2013

Prepared by Department of Education and Early Childhood Development
Melbourne
June 2014

Authorised by the Department of Education and Early Childhood Development,
2 Treasury Place, East Melbourne, Victoria, 3002

This document is also available on the internet at
http://www.education.vic.gov.au/training/providers/market/Pages/reports.aspx

Contents

Victorian Training Market Reports

This Victorian Training Market Report for 2013 is the latest in an on-going series of reports produced by the Department of Education and Early Childhood Development (DEECD). The aim of the report is to provide a summary of Victorian Vocational Education and Training (VET) market performance and responsiveness to industry needs. The full year report includes data reported by training providers for the full year 2013 and provides an overview based on a snapshot of training activity data as at the end of December 2013.

This Report complements a broader set of reports on 2013 training activity to be released separately as part of the 2013 Victorian Training Market Report; the additional reports will include analysis of trends by industry and region.

These reports and other information products produced by the Department help inform students, employers, industry and other key stakeholders on the Victorian vocational training system. These reports have been regularly enhanced and refined in response to stakeholder feedback. Starting from 2014 a number of developments will be implemented to expand the scope of analysis and data available:

- **An on line data portal** available in the second half of 2014. The portal will be available through the Department's public web site and offer up to date reporting on training activity and progressively support interactive exploration of training data through "point and click" charts and maps.
- A half year **Victorian Training Market Report** that will expand on the usual set of indicators reported and include greater depth of analysis on vocational training activity, such as an analysis of students pathways and outcomes. The half year report will build upon the previous quarterly Reports, responding to stakeholder requests for greater depth of analysis which was not possible in the quarterly Reports.
- **E-marketplace** which will facilitate connections between employers and training providers. Employers will be able to anonymously post their training requirements and training providers will be able to provide responses online. The E-marketplace will be available in the third quarter of 2014.

Victoria is recognised as a leader nationally on making data and information easily accessible to stakeholders to support their engagement and participation in the Victorian vocational training system. Already available data and information products available through www.education.vic.gov.au include:

- **Regional Reports** that examines training delivery in each of Victoria's regions in the context of the local population, economy and workforce, building a picture of the relationship between local training system and regional skills needs, training market performance and responsiveness.
- **Industry Reports** that combines industry intelligence and economic analysis with training activity data to build a more complete picture of the relationship between industry skills needs, employment opportunities and skills training.
- **Rate your training** a new ratings tool where employers can rate the quality and performance of a training provider they have used, and where employers can review and compare the ratings of other employers.
- **Industry blog** to provide up to date news and alerts on developments for people interested in skills and training issues in Victoria, the blog features a range of topics relevant to stakeholders and information on recent industry events.
- **Industry Participation Model (IPM) Portfolio Industry Reports** describe training and economic activity and developments related to Victorian key industry sectors. Highlighted are both the challenges faced in attracting the right skills and the opportunities businesses, training providers and government have to address these.
- **Industry skills update – e- Alerts** are provided regularly to subscribers and feature the latest news about the Industry Participation Model activities, market facilitation and related government initiatives; reports and training performance information.
- **Victorian Skills Gateway** – a one stop shop of Victorian vocational education and training information that helps students find the best training option that meets their needs. Searches can be performed on occupations, courses, training providers and by location.

Executive Summary

Victoria's training system is building the skills of the current and future Victorian workforce. The system is highly responsive, meeting the needs of both students and employers, and government investment is supporting large numbers of students who are increasingly choosing to study in areas of most demand in the labour market.

- Government subsidies supported the training of 484,300 students in 2013, over 43 per cent more than in 2010. In 2013 these students were enrolled in 645,000 courses.
- There were 116,900 TAFE domestic fee for service enrolments in 2013, higher than 2010 by more than 13 per cent.
- The number of completions of qualifications (including government subsidised and TAFE fee for service) was 220,200 in 2013, higher than 2010 by 44 per cent.

Access to training in regional Victoria has increased, with enrolments up by almost 30 per cent, from 106,900 in 2010 to over 130,000 in 2013.

- Delivery of government subsidised training in the nine geographic reporting regions shows growth in all regions between 2010 and 2013 except Gippsland.
- When looking at enrolments based on where a student lives, rather than where they study, Gippsland is the only regional area where student numbers were lower in 2013 than 2010 but by only 2 per cent.
- The estimated participation rate of vocational education and training students shows that in 2013 the Barwon South West and Hume regions had the highest participation rate (15 per cent), closely followed by the Western Metropolitan Melbourne region at 14 per cent. The lowest participation rate in government subsidised training was the Eastern metropolitan area at 9 per cent.

Victoria's economy is experiencing the highest rate of structural change across in country. Training is a key mechanism to assist industry and workers in industries experiencing such changes. The Victorian skills system in responding to industry needs, with more enrolments in areas of training relevant to the needs of employers which is more likely to result in positive employment outcomes for students.

- Between 2010 and 2013 training enrolments in specialised or skill shortage occupations increased by 59 per cent, and now represent 41 per cent of all enrolments.[1]
- The top five enrolling specialised or in shortage occupations in 2013 were child carers (30,100 enrolments), aged and disabled carers (20,400), truck drivers (14,600), welfare support workers (11,600) and motor mechanics (8,400).
- 60 per cent of enrolments were delivered in the six highest employing Victorian industry sectors, which account for 59 per cent of all Victorian jobs.

As Victoria transitions to a higher skilled, knowledge-based economy, demand for training has increased. Victoria's flexible training system is opening up more pathways to further learning and employment.

- The proportion of students who were unemployed, not in the labour force or employed in lower skilled and declining occupations rose from 36 per cent of all students in 2010 to 47 per cent in 2013.
- Participation by Indigenous students and students with a disability has also grown between 2010 and 2013 – by 30 per cent and 51 per cent respectively.

[1] This is based upon 2013 training activity data matched against the 2012 skills shortages list. Following finalisation of the 2013 Reports the 2013 Skills Shortages list was completed, when the 2013 list is applied to 2013 training activity data the percentage of government subsidised enrolments that were "in shortage" or specialised occupations increased to 43%. The 2013 Skills Shortages list will be used in future reporting of training activity.

Victoria's training providers continue to be valued by businesses and learners, delivering traditional trades training together with cross-industry and foundation skills.

- Almost half of all TAFE enrolments were in Certificate III-IV and the top three industry areas of enrolment were construction, health care and social assistance and manufacturing.
- Nearly 70 per cent of all private Registered Training Organisation enrolments were in Certificate III-IV and the top three industry areas of enrolment were health care and social assistance, transport, postal and warehousing and manufacturing.
- In the Learn Local sector, over 40 per cent of enrolments were module only enrolments and the top three industry areas were health care and social assistance, accommodation and food services and education and training.

In 2013, the number of government subsidised enrolments by private Registered Training Organisations was 48 per cent of all delivery, TAFEs delivered 40 per cent of training and the Learn Local sector 11 per cent.

Notes about the data

This Report includes key metrics, such as training delivery by funding source, qualification level, course completion, age of learners, learners facing barriers to participation and regional activity. An analysis of alignment to industry needs is also provided.

The main source of vocational training statistics in this publication is the training activity database referred to as Skills Victoria Training System (SVTS). Data included in the report are a snapshot in time and based on data as reported to Higher Education and Skills Group (HESG) in the Department by training providers. For TAFE Institutes, there is an additional regulatory requirement that they also submit their fee for service activity data.

Full year data between 2008 and 2013 are included to show longer term trends. Generally percentage changes include the change from 2008, 2011, 2012 to 2013. However, key tables include information on each percentage change, i.e. 2008 to 2013, 2009 to 2013 and so forth.

The 2013 data were extracted from SVTS as at 22 February 2013. Annual data included in this report may differ from data released by the National Centre for Vocational Education and Research (NCVER) due to use of different business rules to ensure national consistency for reporting purposes and that data may be revised slightly prior to submission to NCVER and by the NCVER itself.

Annual data included in this report may differ to those in previous publications as the DEECD is continuously updating classifications to improve data quality and consistency across years. For example the apportionment of enrolments between the apprentice/trainee categories is marginally different to what was reported previously, this is a result of a correction to the classification of some courses. From time to time changes to reporting and data standards may lead to minor revisions to data previously reported. The data reported in this report was extracted on 22 February 2014; some minor changes occurred to the full year 2013 data following this date and are not reflected in this report. For example following this date about 700 government subsidised enrolments were recoded from pre-accredited to accredited to correct an earlier data quality issue.

Data shown in the tables are rounded to the nearest 100 when the figures are greater than 1,000; to the nearest 50 when they are between 100 and 1,000; and to the nearest 10 when they are less than 100. The percentage changes, e.g. between 2008 and 2013, are calculated based on the unrounded data.

For the purposes of this report the term Learn Local is used interchangeably with Adult and Community Education (ACE). However it should be noted that only Learn Local organisations report through to the ACFE Board, ACE organisations are self-identified and are not required to report through to the Board. In 2013 there were a very small number of Learn Local organisations that self-identified to SVTS as Private RTOs and therefore are not included in the count of Learn Local organisations for the purpose of this report.

Reporting scope

This report includes government subsidised activities in all sectors at all qualification levels, and domestic fee for service activities in the TAFE sector at Australian Qualification Framework (Certificate I and above).

Fee for service activities below Certificate I in the domestic TAFE sector are not included, such as short courses. Fee for service activities that took place in the private RTO and Adult Community Education sectors are also outside the scope.

Since 2012, the scope of reporting of government subsidised training changed. ZC - Corrections delivery contracted directly with TAFE Institutes and ZP - Corrections funding through private prisons have been allocated to fee for service funding. Prior to 2012, these funded enrolments were allocated to government subsidised training.

Vocational Training Summary

Vocational Training by Funding Type

This section provides an overview of training activity measured in terms of course enrolments, student contact hours and student numbers.

Key Points

The 2013 data shows that:

- There were 645,000 government subsidised course enrolments, 183.1 million government subsidised student contact hours and 484,300 government subsidised students.
- TAFE domestic fee for service activity at Australian Qualification Framework (AQF) Certificate 1 and above recorded 116,900 enrolments, 19.8 million student contact hours and 96,700 students.

Table 1.1.1: Enrolments in vocational training by funding type, 2008–2013

	2008	2009	2010	2011	2012	2013
Government subsidised	381,300	376,800	426,900	548,700	670,400	645,000
TAFE domestic fee for service	89,400	100,800	103,700	102,200	124,900	116,900
Total	**470,700**	**477,600**	**530,600**	**650,900**	**795,300**	**761,900**

* Fee for Service figures are TAFE on-shore domestic AQF Level 1 and above.

Table 1.1.2: Change in enrolments in vocational training by funding type

	% change 2008-2013	% change 2009-2013	% change 2010-2013	% change 2011-2013	% change 2012-2013
Government subsidised	69%	71%	51%	18%	-4%
TAFE domestic fee for service*	31%	16%	13%	14%	-6%
Total	**62%**	**60%**	**-4%**	**17%**	**-4%**

*Fee for Service figures are TAFE on-shore domestic AQF Level 1 and above.

Figure 1.1: Enrolments in vocational training by funding type, 2008–2013

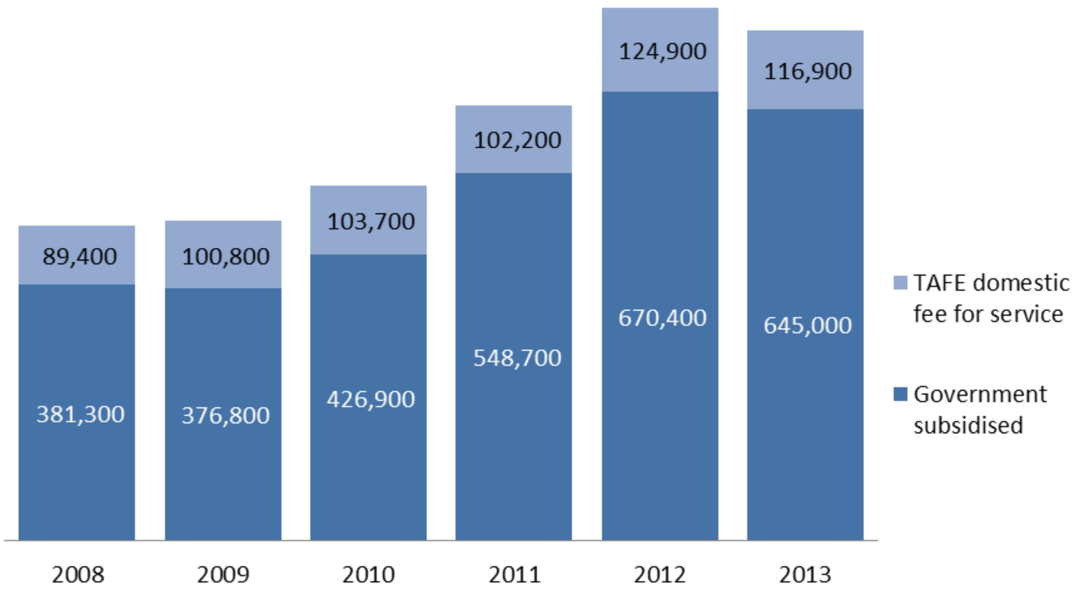


Table 1.2.1: Student contact hours[2] (millions) by funding type, 2008–2013

	2008	2009	2010	2011	2012	2013
Government subsidised	87.4	95.6	112.4	146.9	188.8	183.1
TAFE domestic fee for service*	17.1	20.4	19.4	18.5	21.9	19.8
Total	**104.5**	**116.0**	**131.8**	**165.5**	**210.7**	**202.9**

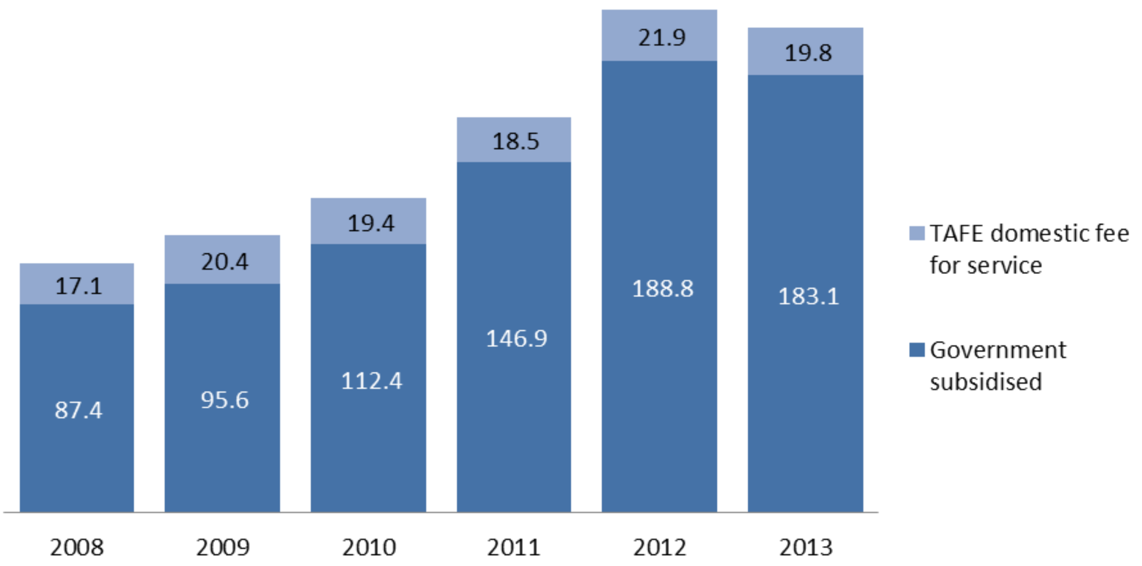
*Fee for Service figures are TAFE on-shore domestic AQF Level 1 and above.

Table 1.2.2: Change in student contact hours (millions) by funding type

	% change 2008-2013	% change 2009-2013	% change 2010-2013	% change 2011-2013	% change 2012-2013
Government subsidised	110%	92%	63%	25%	-3%
TAFE domestic fee for service*	16%	-3%	2%	7%	-9%
Total	**94%**	**75%**	**54%**	**23%**	**-4%**

*Fee for Service figures are TAFE on-shore domestic AQF Level 1 and above.

Figure 1.2: student contact hours (millions) by funding type, 2008–2013



The average government subsidised hours per student have continued to increase from about 297 hours per student in 2008 to 378 in 2013. The 2013 result was also higher than the 2011 result at 342 hours per student and the 2012 result at 370 hours per student.

---

[2] Note that a course enrolment indicates an enrolment by a student in specified course at a registered training organisation. Training hours on the other hand measures the hours taken to deliver training. Total student hours is not an indicator of training provider revenue.

Table 1.3.1: Number of students by funding type, 2008–2013

	2008	2009	2010	2011	2012	2013
Government subsidised	294,700	299,600	339,200	430,300	509,800	484,300
TAFE domestic fee for service*	80,400	93,100	96,000	94,200	105,200	96,700
Total**	**366,700**	**381,300**	**422,500**	**512,900**	**603,200**	**569,300**

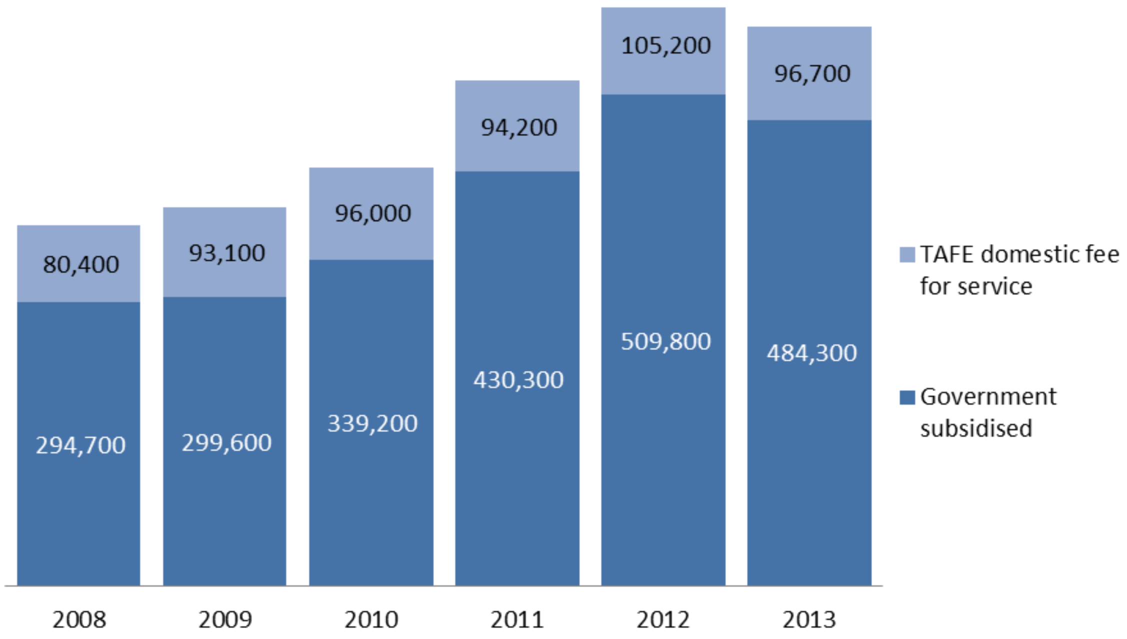
*Fee for Service figures are TAFE on-shore domestic AQF Level 1 and above.
**TAFE students whose enrolments are made up of a combination of government subsidies and self-funding have been counted in both funding categories. The total, however, has eliminated the duplicates.

Table 1.3.2: Change in number of students by funding type

	% change 2008-2013	% change 2009-2013	% change 2010-2013	% change 2011-2013	% change 2012-2013
Government subsidised	64%	62%	43%	13%	-5%
TAFE domestic fee for service*	20%	4%	1%	3%	-8%
Total**	**55%**	**49%**	**35%**	**11%**	**-6%**

*Fee for Service figures are TAFE on-shore domestic AQF Level 1 and above.
**TAFE students whose enrolments are made up of a combination of government subsidies and self-funding have been counted in both funding categories. The total, however, has eliminated the duplicates.

Figure 1.3: Number of students by funding type, 2008–2013



Qualification Levels

Lower level qualifications such as Certificate I and II, provide literacy, numeracy, and work preparation skills to people without post-school qualifications so that they have the opportunity to go on to further study or find employment.

Mid-level skills are essential to the Victorian economy and help drive economic activity across the state. A significant proportion of apprenticeships and traineeships entail attainment of a mid-level qualification and are crucial to many key industries. Apprenticeships and traineeships are undertaken as a contract between the apprentice/trainee and an employer. While undertaking on-the-job learning, the apprentice/trainee receives complementary training through a vocational training provider.

For the purposes of this report Foundation include Foundation skills, workplace preparation, education pathways and low level language other than English courses.

Government Subsidised Enrolments

Key Points

- Government subsidised non-foundation course enrolments at the Certificate I to II levels were 43,700 and at the Certificate III-IV levels were 336,100 in 2013.
- Of the non-foundation courses of study, enrolments in Certificate III-IV represented the largest qualification group.
- Government subsidised Foundation course enrolments at the Certificate I to II level were 124,000 and at the Certificate III-IV levels were 20,100 in 2013.

Table 1.4.1: Government subsidised enrolments (excluding Foundation, workplace preparation, education pathways and LOTE) by qualification level, 2008–2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	63,500	64,100	72,600	79,400	63,900	43,700
Cert III-IV	157,400	157,800	193,600	277,300	347,500	336,100
Diploma & Above	55,700	63,700	71,200	90,300	94,800	68,400
Module Only	50,200	40,700	37,300	30,300	30,600	31,100
Secondary, SoA and other	16,100	15,000	13,700	10,600	10,000	8,500
Total	**342,500**	**340,900**	**388,000**	**487,700**	**546,600**	**487,800**

SoA – Statement of Attainment.

Table 1.4.2: Change in Government subsidised enrolments (excluding Foundation, workplace preparation, education pathways and LOTE) by qualification level

Qualification level	% change 2008-2013	% change 2009-2013	% change 2010-2013	% change 2011-2013	% change 2012-2013
Cert I-II	-31%	-32%	-40%	-45%	-32%
Cert III-IV	114%	113%	74%	21%	-3%
Diploma & Above	23%	7%	-4%	-24%	-28%
Module Only	-38%	-23%	-16%	3%	2%
Secondary, SoA and other	-47%	-43%	-38%	-20%	-15%
Total (excl foundation courses)	**42%**	**43%**	**26%**	**0%**	**-11%**

SoA – Statement of Attainment.

Table 1.5.1: Government subsidised enrolments (only including Foundation, workplace preparation, education pathways and LOTE) by qualification level, 2008–2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	23,600	19,500	21,300	40,000	90,800	124,000
Cert III-IV	8,000	8,100	8,100	10,600	18,400	20,100
Secondary, SoA and other	6,800	7,900	9,200	10,200	14,400	13,000
Total	**38,800**	**35,900**	**38,900**	**61,100**	**123,900**	**157,200**

SoA – Statement of Attainment.

Table 1.5.2: Change in Government subsidised enrolments (only including Foundation, workplace preparation, education pathways and LOTE) by qualification level

Qualification level	% change 2008-2013	% change 2009-2013	% change 2010-2013	% change 2011-2013	% change 2012-2013
Cert I-II	425%	535%	483%	210%	37%
Cert III-IV	150%	150%	147%	90%	9%
Module Only	93%	64%	42%	28%	-9%
Total	**305%**	**338%**	**304%**	**157%**	**27%**

SoA – Statement of Attainment.

TAFE Domestic Fee for Service Enrolments

Key Point

- Proportionally, enrolments in Certificate I-II (non-Foundation) were the largest qualification group amongst TAFE domestic fee for service enrolments at Australian Qualification Framework Certificate 1 and above courses.

Table 1.6.1: TAFE domestic fee for service enrolments (excluding Foundation, workplace preparation, education pathways and LOTE) by qualification level (AQF 1+), 2008–2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	41,300	48,400	51,500	49,500	57,700	56,500
Cert III-IV	40,000	43,400	42,600	42,800	55,300	48,100
Diploma & Above	7,300	8,000	8,300	8,500	10,200	10,900
Higher Education	750	1,000	1,300	1,400	1,600	1,400
Total	**89,400**	**100,800**	**103,700**	**102,200**	**124,900**	**116,900**

Table 1.6.2: Change in Government in TAFE domestic fee for service enrolments (excluding Foundation, workplace preparation, education pathways and LOTE) by qualification level (AQF 1+)

Qualification level	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	37%	14%	-2%
Cert III-IV	20%	12%	-13%
Diploma & Above	48%	28%	6%
Higher Education	97%	4%	-9%
Total	**31%**	**14%**	**-6%**

Table 1.7.1: TAFE domestic fee for service enrolments (only including Foundation, workplace preparation, education pathways and LOTE) by qualification level (AQF 1+), 2008–2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	8,300	7,400	7,400	6,400	11,700	13,700
Cert III-IV	1,800	2,200	2,100	1,900	2,500	2,700
Total	**10,000**	**9,600**	**9,500**	**8,400**	**14,200**	**16,400**

Table 1.7.2: Change in TAFE domestic fee for service enrolments (only including Foundation, workplace preparation, education pathways and LOTE) by qualification level (AQF 1+)

Qualification level	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	66%	112%	17%
Cert III-IV	53%	42%	10%
Total	**63%**	**96%**	**16%**

Government Subsidised Student Contact Hours

Key Point

- Government subsidised student contact hours at Certificate III to IV levels in 2013 accounted for 112.2 million hours.

Table 1.8.1: Government subsidised student contact hours (millions) by qualification level, 2008–2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	14.2	15.2	17.5	22.6	27.9	32.6
Cert III-IV	44.9	48.8	59.1	81.7	112.8	112.2
Diploma & Above	22.9	26.0	30.9	36.2	41.2	31.0
Module Only	1.4	1.6	1.6	1.3	1.4	1.5
Secondary, SoA and other	3.9	4.0	3.3	5.2	5.5	5.9
Total	**87.4**	**95.6**	**112.4**	**146.9**	**188.8**	**183.1**

SoA: Statement of Attainment.

Table 1.8.2: Change in Government subsidised student contact hours (millions) by qualification level

Qualification level	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	130%	44%	17%
Cert III-IV	150%	37%	-1%
Diploma & Above	35%	-14%	-25%
Module Only	7%	16%	7%
Secondary, SoA and other	51%	13%	8%
Total	**110%**	**25%**	**-3%**

SoA: Statement of Attainment.

Vocational Training Completions

Vocational training completions

Apart from the community and social benefits associated with higher levels of educational attainment, there is strong evidence that people who complete vocational training qualifications are at an advantage in the labour market in terms of employment and wage outcomes compared with those who do not complete their courses and those who do not enrol in any post-school education and training. The benefits associated with completion do not detract from the value of outcomes students may achieve from participating in vocational training courses, without necessarily completing their award (such as better skills associated with lifelong learning), but they do suggest that employment and earnings outcomes are improved for students who gain qualifications.

Following is a summary of vocational training completions between 2008 and 2013. Vocational training completions refer to course qualifications or a Statement of Attainment that have been reported as being complete in the reporting year 2013. It is important to note that the reporting scope for completions in this report includes all government subsidised and fee for service enrolments at any course level by all providers.

Completions data is indicative only of completions patterns between 2008 and 2013 and are known to under-report completions due to:

- wide variations in administrative practices for Victorian training organisations in identifying, recording and reporting qualification completion, and
- variations in student intent and behaviour in completing qualifications, many students do not require a completed qualification to obtain employment.

The Department is aware of the issue of under reporting completions and from Quarter 2 2014, will be implementing a standard completions methodology using administrative data, complementary to the NCVER approach, which will be used to supplement reporting of completion results in future reports.

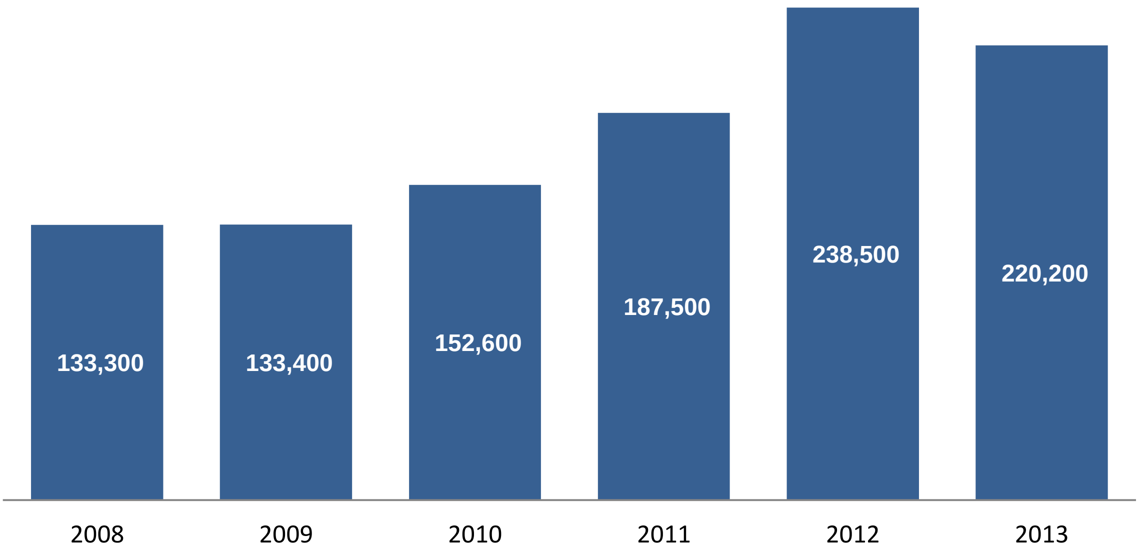
Table 1.9.1: Number of vocational course completions (government subsidised and TAFE fee-for-service), 2008–2013

	2008	2009	2010	2011	2012	2013
VET completions	133,300	133,400	152,600	187,500	238,500	220,200

Table 1.9.2: Change in number of vocational course completions (government subsidised and TAFE fee-for-service)

	% change 2008-2013	% change 2011-2013	% change 2012-2013
VET completions	65%	17%	-8%

Figure 1.4: Number of vocational course completions (government subsidised and TAFE fee-for-service), 2008–2013



Key Points

- Courses at Certificate III-IV made up the largest number of completions in 2013.
- Between 2008 and 2013 the number of completions at the Certificate III-IV more than doubled.

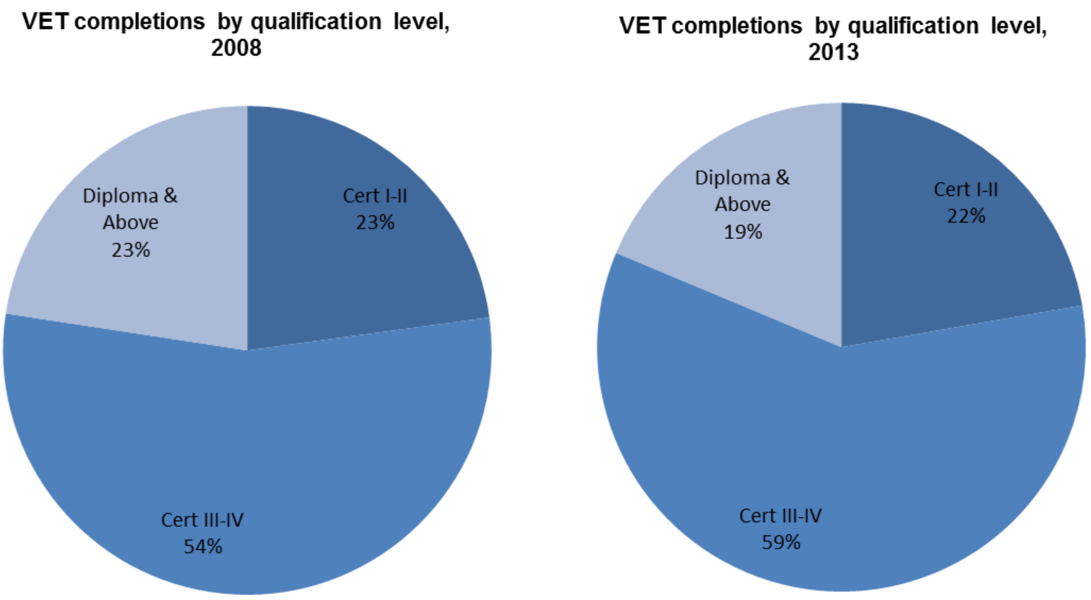
Table 1.10.1: Number of vocational course completions by level (government subsidised and TAFE fee-for-service), 2008–2013

	2008	2009	2010	2011	2012	2013
Cert I-II	25,200	26,300	29,100	37,900	44,600	47,900
Cert III-IV	60,200	64,600	75,100	107,100	146,800	127,100
Diploma & Above	24,900	24,100	30,800	35,000	43,000	40,200
Secondary, SoA and other	22,900	18,100	17,500	7,200	3,700	4,700
Higher Education	90	150	200	350	500	250
Total	**133,300**	**133,400**	**152,600**	**187,500**	**238,500**	**220,200**

Table 1.10.2: Change in number of vocational course completions by level (government subsidised and TAFE fee-for-service), 2008–2013

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	90%	26%	8%
Cert III-IV	111%	19%	-13%
Diploma & Above	61%	15%	-7%
Secondary, SoA and other	-80%	-35%	28%
Higher Education	214%	-21%	-44%
Total	**65%**	**17%**	**-8%**

Figure 1.5: Share of vocational training completions by qualification level, 2008 and 2013



Key Points

- The proportional share the completions by the different Certificate levels between 2008 and 2013 has changed, with Diploma and above and Certificate I-I declining and Certificate III-IV increasing.

Age Profile

Vocational Training Delivery by Age Group

To enable the increased workforce participation levels required by the Victorian economy over the next decade, improved engagement with education and training by all age groups is required.

Students by Age Group in Government Subsidised Training

Key Points

- Young people aged 15 to 24 years accounted for 41 per cent of all students undertaking government subsidised training in 2013, down from 45 per cent in 2008.
- Students aged 15-19 were the only age cohort with student numbers in 2013 which were lower than the numbers for the same age group in 2011 and 2012.

Table 1.11.1: Government subsidised students by age group, 2008–2013

Age group	2008	2009	2010	2011	2012	2013
15 to 19	74,400	76,000	88,300	108,700	120,500	104,600
20 to 24	58,800	59,200	71,400	87,800	100,900	96,300
25 to 44	99,700	102,400	112,600	148,500	180,200	178,700
45 to 64	51,100	52,900	60,200	77,100	96,400	92,900
Under 15, over 64, not stated	10,700	9,200	6,700	8,100	11,800	11,800
Total	**294,700**	**299,600**	**339,200**	**430,300**	**509,800**	**484,300**

Table 1.11.2: Change in government subsidised students by age group

Age group	% change 2008-2013	% change 2011-2013	% change 2012-2013
15 to 19	41%	-4%	-13%
20 to 24	64%	10%	-5%
25 to 44	79%	20%	-1%
45 to 64	82%	20%	-4%
Under 15, over 64, not stated	10%	45%	0%
Total	**64%**	**13%**	**-5%**

Students by Age Group in TAFE Domestic Fee for Service

Key Points

- The number of students enrolled in TAFE domestic fee for service at AQF Certificate 1 and above was 96,700 in 2013. Thirty seven per cent of students were aged between 15 and 24 years.
- Similar to the trend in government subsidised provision, aged 15-19 is the only significant age cohort with student numbers in 2013 lower than the corresponding numbers in 2011.

Table 1.12.1: TAFE domestic fee for service (AQF1+): students by age group, 2008–2013

Age group	2008	2009	2010	2011	2012	2013
15 to 19	22,900	26,400	28,800	28,300	28,900	24,800
20 to 24	9,300	11,100	11,400	10,300	11,600	11,200
25 to 44	29,700	34,800	34,500	34,100	40,600	38,800
45 to 64	16,500	18,400	19,300	19,500	22,100	20,200
Under 15, over 64, not stated	2,000	2,400	2,100	2,100	2,000	1,800
Total	**80,400**	**93,100**	**96,000**	**94,200**	**105,200**	**96,700**

Table 1.12.2: Change in TAFE domestic fee for service (AQF1+): students by age group

Age group	% change 2008-2013	% change 2011-2013	% change 2012-2013
15 to 19	8%	-12%	-14%
20 to 24	20%	8%	-4%
25 to 44	31%	14%	-4%
45 to 64	22%	4%	-9%
Under 15, over 64, not stated	-14%	-17%	-11%
Total	**20%**	**3%**	**-8%**

Gender Profile

Vocational Training Delivery by Gender

The vocational training system is also focused on accessibility and gender equality, ensuring all Victorians have the same opportunity to succeed in their lives and maintain well-being through education and training.

Students by Gender in Government Subsidised Training

Key Points

- The number of female and male students increased by 62 and 66 per cent respectively between 2008 and 2013.
- Between 2012 and 2013 there was a decline of 10 per cent in the numbers of female students in government subsidised training, this decline came from courses in Retail Trade, Accommodation and Food and Arts and Recreation. All areas where there was a previous oversupply of training required to meet the needs of industry.

Table 1.13.1: Government subsidised students by gender, 2008–2013

Gender	2008	2009	2010	2011	2012	2013
Female	139,800	140,900	161,600	208,500	251,900	226,300
Male	154,700	157,300	176,400	220,700	257,200	257,400
Total	**294,700**	**299,600**	**339,200**	**430,300**	**509,800**	**484,300**

Table 1.13.2: Change in government subsidised students by gender

Gender	% change 2008-2013	% change 2011-2013	% change 2012-2013
Female	62%	9%	-10%
Male	66%	17%	0%
Total	**64%**	**13%**	**-5%**

Government Subsidised Activity and Participation by Regions

For the purpose of providing an overview of government subsidised training activity by region, training data are presented for the four departmental administrative regions. In addition, government subsidised training data are further disaggregated into nine smaller geographical areas to provide a more granular level of detail on training delivery and participation.

South-Western departmental region comprises Barwon South West, Grampians and Western Metropolitan regional areas. North-Western departmental region comprises Loddon Mallee and Northern Metropolitan regional areas. North-Eastern departmental region comprises Hume and Eastern Metropolitan regional areas. South-Eastern departmental region comprises Gippsland and Southern Metropolitan regional areas.

Delivery Region

This section focuses on the delivery of government subsidised training by location as defined by four departmental administrative regions or nine small geographical regions. Training courses can be undertaken by students who live locally or outside the local area.

Key Points

- Similar to the overall state-wide trend, government subsidised courses delivered in 2013 across four administrative regions were lower compared to 2012, but higher compared to 2011, except the North Eastern region where courses delivered in 2013 were higher than in 2012.
- Further disaggregation of the delivery data into nine smaller areas or regions, shows that there were some regional variations against the overall state-wide trend:
    - Courses delivered in Hume region in 2013 were higher than in 2011 and 2012;
    - Courses delivered in Gippsland and Eastern Metropolitan regions were lower in 2013 compared to both 2011 and 2012.
- Government subsidised courses delivered in Gippsland region in 2013 were 12 per cent lower than 2011 and 9 per cent lower than 2012.
- Government subsidised courses delivered in Eastern Metropolitan region in 2013 were 10 per cent and 8 per cent lower compared to 2011 and 2012, respectively.

Table 1.14.1: Government subsidised enrolments by departmental delivery region, 2008–2012

Delivery Location	2008	2009	2010	2011	2012	2013
South-Western	119,600	115,800	139,400	202,900	267,800	253,300
North-Western	70,500	80,300	84,700	101,500	124,400	116,400
North-Eastern	84,700	78,200	84,800	100,900	110,400	115,000
South-Eastern	90,300	90,000	104,300	128,100	157,100	152,100
All Regions Total	**364,400**	**363,900**	**412,600**	**532,200**	**656,800**	**634,100**
Other	17,400	13,400	15,100	17,600	15,000	12,200
Total VET	**381,300**	**376,800**	**426,900**	**548,700**	**670,400**	**645,000**

*Other: online and workplace delivery.

Table 1.14.2: Change in government subsidised enrolments by departmental delivery region

Delivery Location	% change 2008-2013	% change 2011-2013	% change 2012-2013
South-Western	112%	25%	-5%
North-Western	65%	15%	-6%
North-Eastern	36%	14%	4%
South-Eastern	68%	19%	-3%
All Regions Total	**74%**	**19%**	**-3%**
Other	-30%	-31%	-19%
Total VET	**69%**	**18%**	**-4%**

*Other: online and workplace delivery.

Table 1.15.1: Government subsidised enrolments by delivery region, 2008–2013

Delivery Location	2008	2009	2010	2011	2012	2013
Barwon South West	28,800	31,800	35,800	50,100	62,500	52,000
Grampians	14,600	16,200	15,000	17,200	18,900	17,900
Loddon Mallee	23,600	27,900	28,300	32,800	37,100	33,200
Hume	29,100	26,000	24,700	27,300	34,400	47,100
Gippsland	26,700	22,400	22,500	20,500	19,700	18,000
Eastern Metropolitan	55,500	52,200	60,100	73,600	76,000	68,100
Western Metropolitan	76,300	67,900	88,600	135,800	186,400	183,600
Southern Metropolitan	63,600	67,700	81,800	107,600	137,400	134,100
Northern Metropolitan	46,900	52,400	56,400	68,700	87,300	83,200
All Regions Total	**364,400**	**363,900**	**412,600**	**532,200**	**656,800**	**634,100**
Other	17,400	13,400	15,100	17,600	15,000	12,200
Total VET	**381,300**	**376,800**	**426,900**	**548,700**	**670,400**	**645,000**

Table 1.15.2: Change in government subsidised enrolments by delivery region

Delivery Location	% change 2008-2013	% change 2011-2013	% change 2012-2013
Barwon South West	81%	4%	-17%
Grampians	22%	4%	-5%
Loddon Mallee	41%	1%	-11%
Hume	62%	73%	37%
Gippsland	-33%	-12%	-9%
Eastern Metropolitan	23%	-8%	-10%
Western Metropolitan	141%	35%	-2%
Southern Metropolitan	111%	25%	-2%
Northern Metropolitan	77%	21%	-5%
All Regions Total	**74%**	**19%**	**-3%**
Other	-30%	-31%	-19%
Total VET	**69%**	**18%**	**-4%**

Participation

This section presents data on students undertaking government subsidised training by the area where they live. Areas are defined as the four departmental administrative regions or nine smaller geographical regions. Students may undertake their training locally or travel to locations outside their local region.

Key Points

- In line with the overall state-wide trend, the numbers of students who participated in government subsidised training in 2013 were lower in each of the four Departmental administrative regions compared to 2012, but higher compared to 2011.
- When data was further disaggregated into nine regions, they show that there were some variations against the overall state-wide trend. The number of students undertaking government subsidised training who lived in Gippsland region in 2013 was lower compared to 2011, 2012 and 2008.
- In terms of the participation rate of students aged 15-64 in government subsidised vocational education and training in 2013, the Hume and Barwon South West regions had the highest estimated participation rate, followed by Loddon Mallee region. The lowest participation rate was in Eastern Metropolitan region.

Table 1.16.1: Government subsidised students by residential location - departmental region, 2008–2013

Residential location	2008	2009	2010	2011	2012	2013
South-Western	75,700	100,900	114,200	153,900	199,200	189,400
North-Western	69,700	67,700	75,800	97,600	111,100	106,100
North-Eastern	65,500	64,800	71,600	89,000	101,700	92,800
South-Eastern	78,900	80,000	92,000	115,800	137,300	132,600
All Regions Total	**289,800**	**293,400**	**331,900**	**424,500**	**502,400**	**477,200**
Other*	4,900	6,200	7,300	5,800	7,400	7,100
Total students	**294,700**	**299,600**	**339,200**	**430,300**	**509,800**	**484,300**

*Other includes not stated, unknown, interstate or overseas.

Table 1.16.2: Change in government subsidised students by residential location - departmental region

Residential location	% change 2008-2013	% change 2011-2013	% change 2012-2013
South-Western	150%	23%	-5%
North-Western	52%	9%	-4%
North-Eastern	42%	4%	-9%
South-Eastern	68%	14%	-3%
All Regions Total	**65%**	**12%**	**-5%**
Other*	46%	23%	-3%
Total students	**64%**	**13%**	**-5%**

*Other includes not stated, unknown, interstate or overseas.

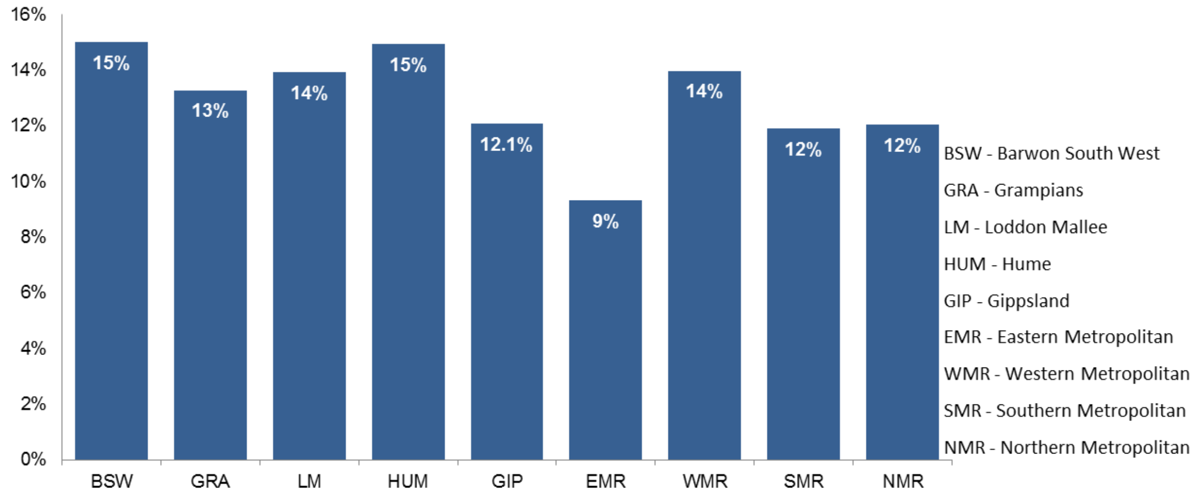
Table 1.17.1: Government subsidised students by residential area – region, 2008–2013

Residential location	2008	2009	2010	2011	2012	2013
Barwon South West	24,500	26,300	29,000	36,100	41,300	36,700
Grampians	13,900	14,400	15,400	18,400	21,400	19,800
Loddon Mallee	20,500	21,000	21,900	27,400	31,500	28,000
Hume	21,300	19,900	20,000	23,200	26,500	26,100
Gippsland	21,900	19,100	20,700	21,500	21,200	20,300
Eastern Metropolitan	44,300	44,900	51,600	65,800	75,200	66,800
Western Metropolitan	37,200	40,300	48,200	67,500	89,700	89,100
Southern Metropolitan	57,000	60,900	71,400	94,300	116,100	112,300
Northern Metropolitan	49,100	46,600	53,900	70,300	79,600	78,100
All Regions Total	**289,800**	**293,400**	**331,900**	**424,500**	**502,400**	**477,200**
Other	4,900	6,200	7,300	5,800	7,400	7,100
Total students	**294,700**	**299,600**	**339,200**	**430,300**	**509,800**	**484,300**

Table 1.17.2: Change in government subsidised students by residential area – region

Residential location	% change 2008-2013	% change 2011-2013	% change 2012-2013
Barwon South West	50%	2%	-11%
Grampians	42%	8%	-7%
Loddon Mallee	36%	2%	-11%
Hume	23%	13%	-2%
Gippsland	-7%	-5%	-4%
Eastern Metropolitan	51%	1%	-11%
Western Metropolitan	139%	32%	-1%
Southern Metropolitan	97%	19%	-3%
Northern Metropolitan	59%	11%	-2%
All Regions Total	**65%**	**12%**	**-5%**
Other	46%	23%	-3%
Total students	**64%**	**13%**	**-5%**

Figure 1.6: Estimated participation rate[3] of students aged 15-64 in government subsidised training by region, 2013



[3] The 2012 estimated resident population published by the Australian Bureau of Statistics (Cat 3235.0) were used to calculate the participation rate for each regional area in 2013, as the 2013 population data by sub-state level is not yet available.

Government Subsidised Delivery by Provider Type

Key Points

- In 2013 the number of government subsidised enrolments by Private RTOs represented 48 per cent of delivery by all sectors; this was up on the 2012 result of 46 per cent. TAFEs, excluding Universities, represented 32 per cent of all government subsidised enrolments.
- The TAFE sector, including Universities, had a larger share of government subsidised enrolments than Private RTOs in Construction; Arts and Recreation Services; Professional, Scientific and technical Services; Agriculture, Forestry and Fishing; Information media and Telecommunications; Rental, Hiring and Real Estate Services and Electricity, Gas, Water and Waste Services industries.
- Private RTOs had a larger proportional share in Health Care and Social Assistance; Transport, Postal and Warehousing; Manufacturing; Accommodation and Food Services; Administrative and Support Services; Retail Trade; Education and Training; Public Administration and Safety and Financial and Insurance Services industries.
- TAFEs account for 57 per cent of the proportional share of the delivery of Foundation skills courses of study, Private RTOs account for 32 per cent and Learn Local 12 per cent.

This section provides an overview of government subsidised delivery by sector. While the introductory tables separate University (former dual sector providers) and TAFEs, for consistency with previous reporting they are combined under the group of TAFE.

Table 1.18: Government subsidised delivery by provider number*, 2008–2013

	2008	2009	2010	2011	2012	2013
Learn Local[4]	342	320	316	309	298	282
Private RTO	201	246	344	422	445	428
University	4	4	4	4	4	4
TAFE	14	14	14	14	14	14

* The above providers include those providing pre-accredited and accredited subsidised training. The number of training providers with a 2014 Service Agreement was 505 as at March 2014.

Table 1.19.1: Number of government subsidised enrolments by provider type, 2008 to 2013

	2008	2009	2010	2011	2012	2013
Learn Local	73,800	68,300	63,800	64,600	80,200	73,500
Private RTOs	54,000	57,400	99,800	220,700	308,800	312,000
Universities	72,400	68,500	76,300	69,900	68,100	51,500
TAFE	181,100	182,600	187,000	193,600	213,300	207,900

[4] For the purposes of this report the term Learn Local is used interchangeably with Adult and Community Education (ACE). However it should be noted that only Learn Local organisations report through to the ACFE Board, ACE organisations are self-identified and are not required to report through to the Board. In 2013 there were a very small number of Learn Local organisations that self-identified to SVTS as Private RTOs and therefore are not included in the count of Learn Local organisations for the purpose of this report.

Table 1.19.2: Change in number of government subsidised enrolments by provider type

	% change 2008-2013	% change 2009-2013	% change 2010-2013	% change 2011-2013	% change 2012-13
Learn Local	0%	8%	15%	14%	-8%
Private RTO	478%	444%	213%	41%	1%
Universities	-29%	-25%	-33%	-26%	-24%
TAFE	15%	14%	11%	7%	-3%

Table 1.20: Percentage share of government subsidised enrolments for each year by provider type, 2008 to 2013

	2008	2009	2010	2011	2012	2013
Learn Local	19%	18%	15%	12%	12%	11%
Private RTOs	14%	15%	23%	40%	46%	48%
Universities	19%	18%	18%	13%	10%	8%
TAFE	47%	48%	44%	35%	32%	32%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Figure 1.7: Percentage share of Government subsidised enrolments by provider type, 2008 to 2013

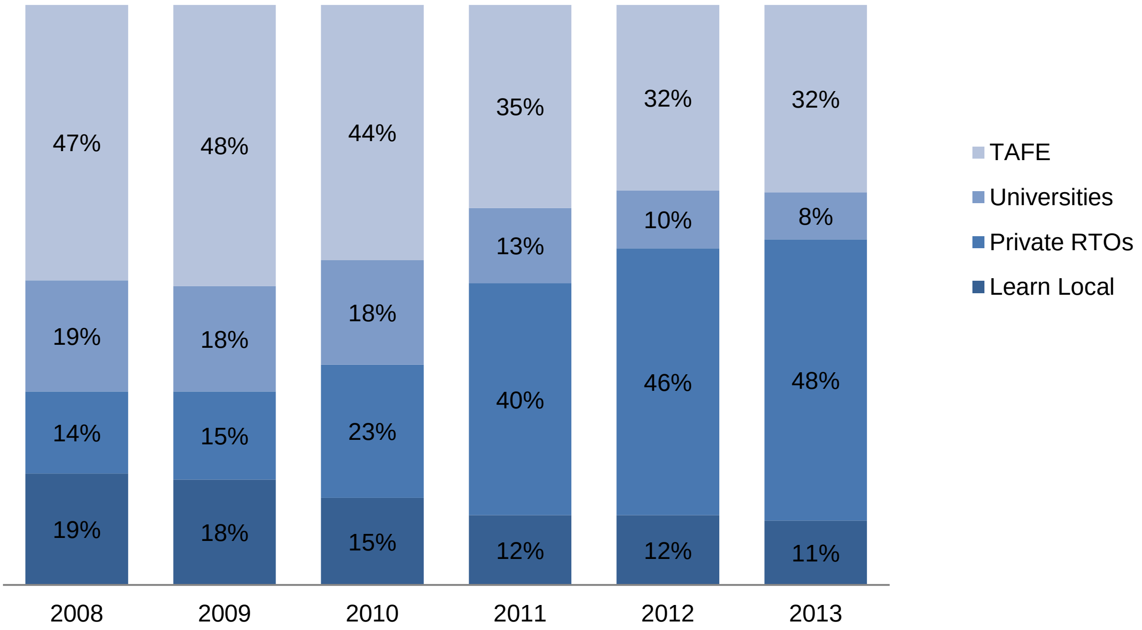


Table 1.21: Government subsidised enrolments (AQF1+), proportional share across provider types by industry, 2013

	TAFE	Private RTOs	Learn Local	Total (number)
A: Agriculture, Forestry and Fishing	50%	48%	2%	8,300
B: Mining	73%	27%	0%	350
C: Manufacturing	32%	68%	0%	43,500
D: Electricity, Gas, Water and Waste Services	85%	15%	0%	750
E: Construction	69%	31%	0%	62,700
F: Wholesale Trade	12%	87%	0%	1,000
G: Retail Trade	24%	74%	3%	15,400
H: Accommodation and Food Services	24%	70%	6%	30,300
I: Transport, Postal and Warehousing	21%	78%	0%	46,100
J: Information Media and Telecommunications	81%	17%	2%	3,300
K: Financial and Insurance Services	12%	88%	0%	3,100
L: Rental, Hiring and Real Estate Services	52%	48%	0%	1,700
M: Professional, Scientific and Technical Services	93%	6%	0%	10,500
N: Administrative and Support Services	25%	72%	3%	15,600
O: Public Administration and Safety	28%	72%	0%	8,100
P: Education and Training	41%	50%	8%	12,700
Q: Health Care and Social Assistance	28%	62%	10%	87,300
R: Arts and Recreation Services	50%	46%	4%	15,900
S: Other Services	51%	46%	2%	21,100
T: Cross-industry	26%	70%	4%	60,300
U: Foundation Skills and LOTE	57%	32%	12%	144,200
Not applicable / Unknown	2%	47%	51%	50
Total (AQF1+)	**42%**	**52%**	**6%**	**592,300**

Table 1.22 Government subsidised enrolments (AQF1+), summary of selected characteristics within provider type, 013

TAFE	Private RTOs	Learn Local
Proportional share of enrolments by qualification - all course levels		
• 49% of total TAFE enrolments were in Certificate III-IV, followed by • Certificate I-II (33%), • Diploma and above (14%), and • Secondary Education, SoA[3] and Other (4%) All TAFEs had enrolments of the above course levels.	• 69% of total private RTO enrolments were in Certificate III-IV: available at 404 RTOs, followed by • Certificate I-II (21%): available at 211 RTOs, • Diploma and above (10%): available at 257 RTOs and • Module Only, Secondary Education and SoA (0.6%): available at 14 RTOs.	• 41% of total enrolments in the Learn Local sector were in Module Only: available at 233 providers, followed by • Certificate I-II (23%): available at 103 providers, • Certificate III-IV (20%): available at 95 providers, • Secondary Education and SoA (13%): available at 88 providers and • Diploma and above (3%) - available at 37 providers.
Proportional share of enrolments by industry[1] - AQF1 and above		
Study areas spread across all industries, with top five enrolment shares in: • Foundation Skills and LOTE (33%) • Construction (17%) • Health Care and Social Assistance (10%) • Cross-Industry[2] (6%) • Manufacturing (6%)	Study areas spread across all industries, with top five enrolment shares in: • Health Care and Social Assistance (17%) • Foundation Skills and LOTE (15%) • Cross-industry (14%) • Transport, Postal and Warehousing (12%) • Manufacturing (9%)	Study areas concentrate on certain industries, with top five enrolment shares in: • Foundation Skills and LOTE (50%) • Health Care and Social Assistance (27%) • Cross-industry (7%) • Accommodation and Food Services (5%) • Education and Training (3%)
Learner profile (students) - all course levels		
• Aged 15-19: 28% • Aged 20-24: 24% • Aged 25-44: 33% • Aged 45-64: 14% • Under 15, Over 64, Not stated: 1%	• Aged 15-19: 18% • Aged 20-24: 19% • Aged 25-44: 41% • Aged 45-64: 20% • Under 15, Over 64, Not stated: 2%	• Aged 15-19: 15% • Aged 20-24: 9% • Aged 25-44: 32% • Aged 45-64: 32% • Under 15, Over 64, Not stated: 11%
• 63% males	• 50% females	• 66% females
• 64% in employment • 21% unemployed • 13% not in the labour force	• 60% in employment • 32% unemployed • 5% not in the labour force	• 34% in employment • 33% unemployed • 28% not in the labour force
• 7% with disability	• 7% with disability	• 21% with disability
• 35% did not complete Year 12 or equivalent prior VET study	• 36% did not complete Year 12 or equivalent prior VET study	• 47% did not complete Year 12 or equivalent prior VET study

1. Industry classification is only applicable to courses at Australian Qualification Framework Level I and above.
2. Cross-industry courses like project management.
3. SoA refers to Statement of Attainment.

Learn Local Performance

Learn Local (ACE) Pre-accredited and Accredited training

Through the Adult, Community and Further Education (ACFE) Board, the Victorian Government funds 298 Learn Local adult and community education (ACE) organisations, including two adult education institutions, the Council for Adult Education (CAE) and Adult Multicultural Education Services (AMES) to deliver pre-accredited training to Victorians with limited prior educational attainment and limited access to vocational education and training. Learn Local providers support learners' personal development in the knowledge, skills and attributes necessary to participate in society and secure employment. In addition to pre-accredited program delivery, there are 117 Learn Local providers that additionally are registered training organisations (RTOs) delivering accredited provision. This chapter of the report provides a snapshot of the contribution of the Learn Local (ACE) sector to government funded vocational training in Victoria.

The Victorian Government recently launched *Learn Local: Focusing on the Future*. This strategy has been developed by the Department of Education and Early Childhood Development and the ACFE Board in consultation with Learn Local peak bodies and providers. The strategy recognises Learn Local providers' current opportunities and challenges in the context of recent training market reforms and confirms their role in providing a supportive and inclusive learning environment for people to engage in high quality training. *Learn Local: Focusing on the Future* sets out the actions that government will undertake to help the sector meet its potential, sharpen its focus and improve its sustainability and responsiveness.

The ratio between pre-accredited and accredited programs in 2013 marginally shifted from the pattern of previous years. In 2011 and 2012, Learn Local providers had delivered slightly more course enrolments into accredited than pre-accredited programs. In 2013, pre-accredited course enrolments increased to comprise fifty per cent of all course enrolments reported by Learn Local providers (36,600 pre-accredited enrolments). Accordingly, the remaining fifty per cent of all reported course enrolments were in accredited programs (36,900 accredited enrolments).

Learn Local (ACE) Pre-accredited training

Key Points

- The ACFE Board purchased 1.9m hours of annual pre-accredited delivery in 2013, which represented an across the board increase in pre-accredited delivery, and included an additional delivery priority of improving the digital literacy of the Victorian workforce.
- In comparison to the preceding year, the increased purchase in 2013 led to increases of 0.2m more hours (up 13 per cent), 2,100 more course enrolments (up 6 per cent to 36,600 enrolments in 2013) and 300 more students (up 1 per cent to 24,500 students) in pre-accredited training. The contrasting headline rates of more hours to marginally more students was a result of Learn Locals reporting more multiple course enrolments per student and increased course duration in 2013 than in previous years.
- The marginal increase of students in 2013 was attributed to delivery in the western regions of Victoria. Pre-accredited delivery in the South Western Victoria and North Western Victoria regions increased a combined 9 per cent over 2012-2013, which contrasts to the reported 19 per cent increase in pre-accredited students in these regions over 2011-2013. In comparison, annual 2013 delivery rates to pre-accredited students in the North Eastern Victoria and South Eastern Victoria regions did not match that of the previous year (down 1 per cent). This contrasts a combined 11 per cent increase over 2011 to 2013 across these two regions. In addition, the two Adult Education Institutes (AEIs) reported over 600 fewer enrolled students in 2013 than the previous year (a 47 per cent decrease on 2012).

- During 2013, Learn Local (ACE) providers increased pre-accredited program delivery to the majority of ACFE Board Priority Learner groups in comparison to the preceding year. For example, students not in work were a significant priority group in pre-accredited delivery. In 2013 there were 600 more unemployed students in pre-accredited training (up 9 per cent to 6,900 students) over 2012 levels. Also, 500 more Victorians with a self-declared disability engaged in pre-accredited training than in 2012 (up 9 per cent to 6,100 students). Disengaged Youth in pre-accredited training experienced the greatest rate of increase over 2012-2013, but from a relatively low base (up 16 per cent to 1,000 students). The increases on 2012-2013 reported delivery across the majority of ACFE Board Priority Learner groups contrast to the 2011-2013 results where, for example, 1,300 more Victorians with a self-declared disability studied in pre-accredited programs than in 2011 (a 29 per cent increase). In summary, ACFE Board Priority Learners generally participated in pre-accredited training at rates above the headline rate of all student involvement. It must be noted that the priority learner categories are not mutually exclusive and reported students may self-identify in any one or a combination of these categories.

Table 1.23.1: Government subsidised pre-accredited training, Learn Local (ACE) providers, 2008-2013

	2008	2009	2010	2011	2012	2013
Course Enrolments	45,800	38,100	36,700	31,200	34,500	36,600
Student Contact Hours (millions)	1.7	1.6	1.9	1.5	1.7	1.9
Students	28,000	23,600	23,900	21,400	24,200	24,500

Table 1.23.2: Change in government subsidised pre-accredited training

	% change 2008-2013	% change 2011-2013	% change 2012 - 2013
Course Enrolments	-20%	17%	6%
Student Contact Hours (millions)	13%	32%	13%
Students	-12%	15%	1%

Table 1.24.1: Government subsidised students in pre-accredited training with Learn Local (ACE) providers by departmental region, 2008-2013

Delivery Location	2008	2009	2010	2011	2012	2013
South-Western	5,800	5,500	6,000	5,500	6,100	6,800
North-Western	5,300	4,800	5,300	4,800	5,200	5,500
North-Eastern	6,900	5,600	5,300	4,500	5,000	5,000
South-Eastern	10,000	7,700	6,500	5,900	6,500	6,500
AEIs	60	60	750	650	1,350	710
Total	**28,000**	**23,600**	**23,900**	**21,400**	**24,200**	**24,500**

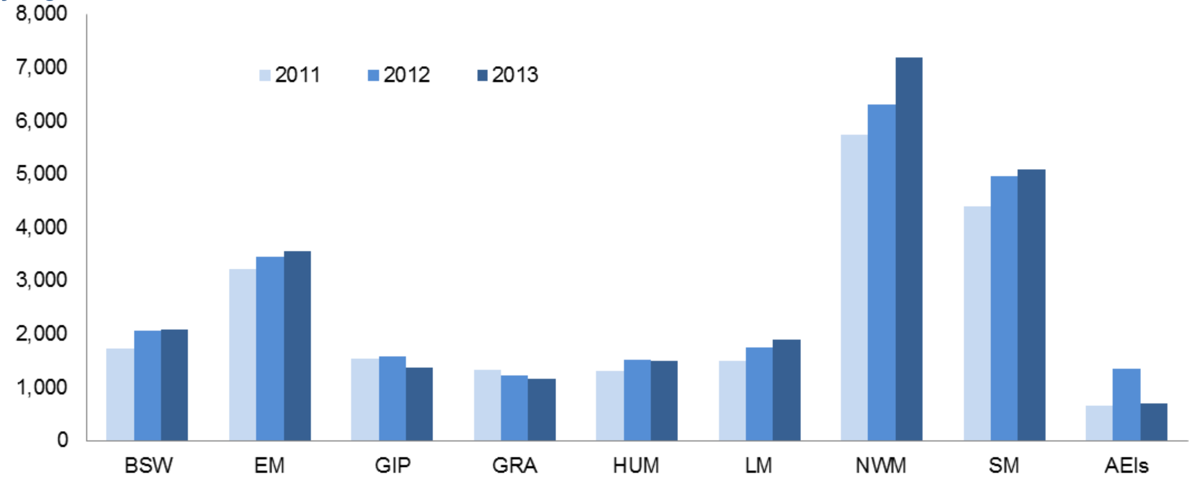
AEIs: Adult Education Institutes

Table 1.24.2: Change in government subsidised students in pre-accredited training with Learn Local (ACE) providers by departmental region

Delivery Location	% change 2008-2012	% change 2011-2013	% change 2012 - 2013
South-Western	18%	12%	11%
North-Western	4%	8%	6%
North-Eastern	-27%	10%	2%
South-Eastern	-35%	10%	-1%
AEIs	1042%	8%	-47%
Total	**-12%**	**15%**	**1%**

AEIs: Adult Education Institutes

Figure 1.8: Government subsidised students in pre-accredited training with Learn Local (ACE) providers by regional area, 2011, 2012, 2013



BSW	Barwon South West	HUM	Hume	NWM	North Western Metropolitan
GRA	Grampians	GIP	Gippsland	SM	Southern Metropolitan
LMR	Loddon Mallee	EM	Eastern Metropolitan	AEIs	Adult Education Institutes

Table 1.25.1: Government subsidised ACFE Board Priority Learners enrolled in pre-accredited programs with Learn Local (ACE) providers, 2008-2013

	2008	2009	2010	2011	2012	2013
CALD (LOTE)	4,100	4,300	4,900	5,700	6,800	6,600
Disability	4,600	4,200	4,900	4,800	5,600	6,100
Disengaged Youth	900	400	1,000	600	900	1,000
Early school leavers	7,400	6,000	5,900	4,900	5,200	5,300
Indigenous	400	220	340	340	410	450
Males 45 to 64	2,800	2,500	2,700	2,400	2,700	2,600
Unemployed	5,400	5,200	5,700	5,300	6,300	6,900
Vulnerable workers	5,300	4,400	5,100	4,900	5,700	5,500

Note: ACFE Board Priority Learner categories are not mutually exclusive. Detail on these categories is available at: www.education.vic.gov.au/Documents/about/research/acfepublications/hardtoreachlearn.pdf

Table 1.25.2: Change in government subsidised ACFE Board Priority Learners enrolled in pre-accredited programs with Learn Local (ACE) providers

	% change 2008-2013	% change 2011-2013	% change 2012 - 2013
CALD (LOTE)	62%	16%	-3%
Disability	32%	29%	9%
Disengaged Youth	16%	70%	16%
Early school leavers	-28%	8%	2%
Indigenous	12%	33%	8%
Males 45 to 64	-9%	6%	-4%
Unemployed	26%	29%	9%
Vulnerable workers	3%	11%	-3%

Note: ACFE Board Priority Learner categories are not mutually exclusive. Detail on these categories is available at: www.education.vic.gov.au/Documents/about/research/acfepublications/hardtoreachlearn.pdf

Learn Local (ACE) Accredited training

Key Points

- Learn Local providers' accredited program delivery has increased over 2011 to 2013. Learn Locals reported an overall 8 per cent increase in students taking accredited programs over 2011 to 2013 (an additional 2,200 students). In contrast, there were 6,600 fewer students (-18 per cent) reported over 2012 (36,300 students) to 2013 (29,700 students).
- The general trend for accredited delivery into regional Victoria over 2011 to 2013 was a decrease in reported student numbers. The exception to this trend was in regional North West Victoria, which experienced a five per cent increase in students. In contrast, the general trend for metropolitan Melbourne regional areas was increased accredited students over 2011 to 2013. The exception to this trend was metropolitan sections of North Eastern Victoria which experienced reduced student numbers (a 15 per cent reduction). The Adult Education Institutes reported a 2 per cent increase (100 additional students) in accredited delivery over 2011 to 2013. This contrasts a 13 per cent reduction in accredited numbers between 2012 and 2013.
- In nearly all cases, there were significant increases in accredited students identified by the ACFE Board Priority Learner group categories over 2011 to 2013. For example, Learn Local delivery of accredited courses to Culturally and Linguistically Diverse (CALD) students increased by 1,900 over 2011 to 2013 (up 28 per cent). Similarly, there were 1,700 more Unemployed Victorians in accredited training with Learn Local providers over 2011 to 2013 (up 18 per cent). More vulnerable workers[5] underwent accredited training in 2013 than in 2011 (up 26 per cent to 7,300 students in 2013). The increases on 2011 reported delivery across the majority of ACFE Board Priority Learner groups contrast to twelve-month results for 2012-2013 where, for example, Early School Leavers enrolled in nationally accredited courses with Learn Local providers reported a single decrease of 2,200 enrolled learners between 2012 and 2013 (-24 per cent). In summary, the increased ACFE Board priority group students between 2011 and 2013 represented a significant uptake of these learner types into Learn Local (ACE) settings.

[5] Vulnerable workers tend to be in low-paid jobs, are often under-employed, and face job insecurity and limited job opportunities. They might not be able to access entitlements such as superannuation, sick leave, maternity leave and have little if any access to training and development. For some, their vulnerability stems from low skills or poor qualifications.

www.education.vic.gov.au/Documents/about/research/acfepublications/hardtoreachlearn.pdf

Table 1.26.1: Government subsidised accredited training, Learn Local (ACE) providers, 2008-2013

	2008	2009	2010	2011	2012	2013
Course Enrolments	27,900	30,200	27,100	33,300	45,800	36,900
Student Contact Hours(millions)	5.4	6.6	6.7	8.5	11.9	9.6
Students	24,000	25,700	23,700	27,500	36,300	29,700

Table 1.26.2: Change in government subsidised accredited training, Learn Local (ACE) providers

	% change 2008-2013	% change 2011-2013	% change 2012 - 2013
Course Enrolments	32%	11%	-19%
Student Contact Hours(millions)	79%	13%	-19%
Students	24%	8%	-18%

Table 1.27.1: Government subsidised students in accredited training with Learn Local (ACE) providers by departmental region, 2008-2013

Delivery Location	2008	2009	2010	2011	2012	2013
South-Western	5,300	6,200	5,600	8,700	14,500	8,500
North-Western	4,800	5,200	4,900	5,600	7,000	7,700
North-Eastern	5,700	5,600	4,600	4,500	5,000	4,100
South-Eastern	4,100	4,700	5,300	5,300	5,800	5,900
AEIs	4,100	4,000	3,300	3,400	4,000	3,500
Total	**24,000**	**25,700**	**23,700**	**27,500**	**36,300**	**29,700**

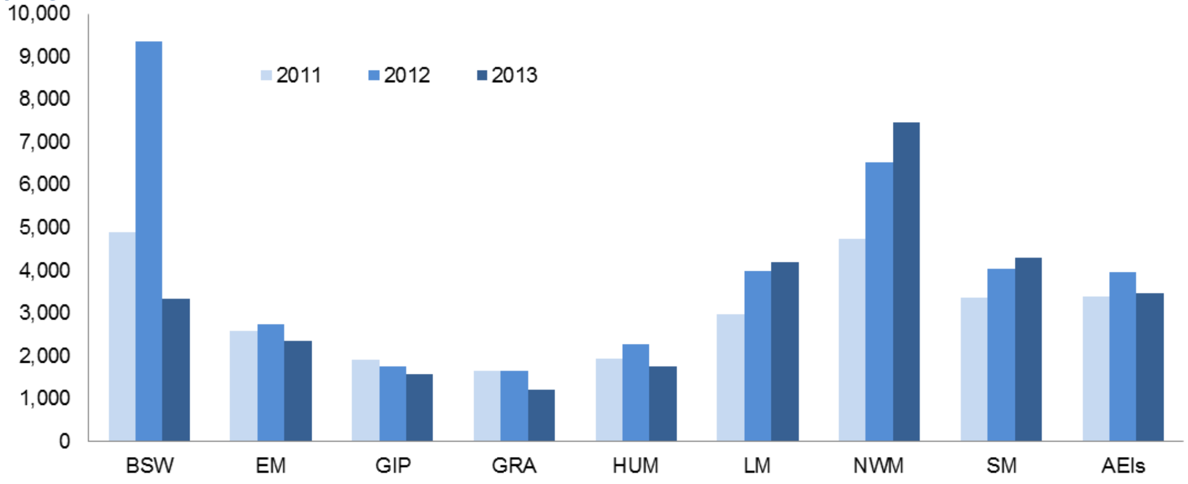
AEIs: Adult Education Institutes

Table 1.27.2: Change in government subsidised students in accredited training with Learn Local (ACE) providers by departmental region

Delivery Location	% change 2008-2012	% change 2011-2013	% change 2012 - 2013
South-Western	60%	66%	-41%
North-Western	60%	26%	9%
North-Eastern	-28%	11%	-18%
South-Eastern	44%	10%	2%
AEIs	-15%	2%	-13%
Total	**24%**	**8%**	**-18%**

AEIs: Adult Education Institutes

Figure 1.9: Government subsidised students in accredited training with Learn Local (ACE) providers by regional area, 2011, 2012, 2013



BSW	Barwon South West	HUM	Hume	NWM	North Western Metropolitan
GRA	Grampians	GIP	Gippsland	SM	Southern Metropolitan
LMR	Loddon Mallee	EM	Eastern Metropolitan	AEIs	Adult Education Institutes

Table 1.28.1: Government subsidised ACFE Board Priority Learners enrolled in accredited programs with Learn Local (ACE) providers, 2008-2013

	2008	2009	2010	2011	2012	2013
CALD (LOTE)	6,000	6,300	5,600	6,700	9,000	8,600
Disability	3,500	3,500	3,500	4,600	6,000	5,400
Disengaged Youth	1,500	2,000	1,700	2,600	3,700	3,100
Early school leavers	6,000	6,400	5,600	7,100	9,100	6,900
Indigenous	310	340	340	460	570	550
Males 45 to 64	1,600	1,800	1,700	2,100	2,600	2,200
Unemployed	6,100	7,300	6,900	9,400	13,700	11,100
Vulnerable workers	4,700	5,100	4,800	5,800	7,300	7,300

Note: ACFE Board Priority Learner categories are not mutually exclusive. Detail on these categories is available at: www.education.vic.gov.au/Documents/about/research/acfepublications/hardtoreachlearn.pdf

Table 1.28.2: Change in government subsidised ACFE Board Priority Learners enrolled in accredited programs with Learn Local (ACE) providers

	% change 2008-2013	% change 2011-2013	% change 2012 - 2013
CALD (LOTE)	43%	28%	-4%
Disability	55%	18%	-10%
Disengaged Youth	102%	18%	-17%
Early school leavers	16%	-2%	-24%
Indigenous	80%	20%	-3%
Males 45 to 64	39%	9%	-13%
Unemployed	82%	18%	-19%
Vulnerable workers	55%	27%	1%

Note: ACFE Board Priority Learner categories are not mutually exclusive. Detail on these categories is available at: www.education.vic.gov.au/Documents/about/research/acfepublications/hardtoreachlearn.pdf

Learners Facing Barriers to Participation

Vocational Training Delivery to Learner Cohorts Facing Barriers

Young people and adult learners who may be members of more than one equity group, can have complex and multiple learning needs, and may have contact with a suite of government services and programs. There is a significant evidence base that demonstrates the value and importance of education and training to these population cohorts. However, higher needs learners may face a combination of barriers to effective engagement in education and training including low levels of previous educational achievement, low aspirations, and poor access to training and broader barriers such as poverty, homelessness and poor health.

Vocational training has continued to be a critical enabler in opening up pathways for higher needs and disadvantaged learners through the provision of tailored, individualised services, often in partnership with other service providers.

Table 2.1.1: Students undertaking Government subsidised training by selected learner cohort*, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Indigenous	4,400	4,300	4,800	5,600	6,200	6,500
Students with a disability	23,900	23,600	27,200	34,100	40,300	40,500
CALD	58,100	62,100	70,600	97,300	126,400	137,500
Unemployed	41,800	50,200	62,500	89,300	118,500	134,800
Young people without Year 12, not at school and enrolled in Cert II or above						
Aged 15-19 years	23,100	22,600	26,300	28,900	29,500	24,700
Older students not holding a Cert III or above						
Aged 20-64 years	125,700	131,800	149,600	214,000	266,200	260,700

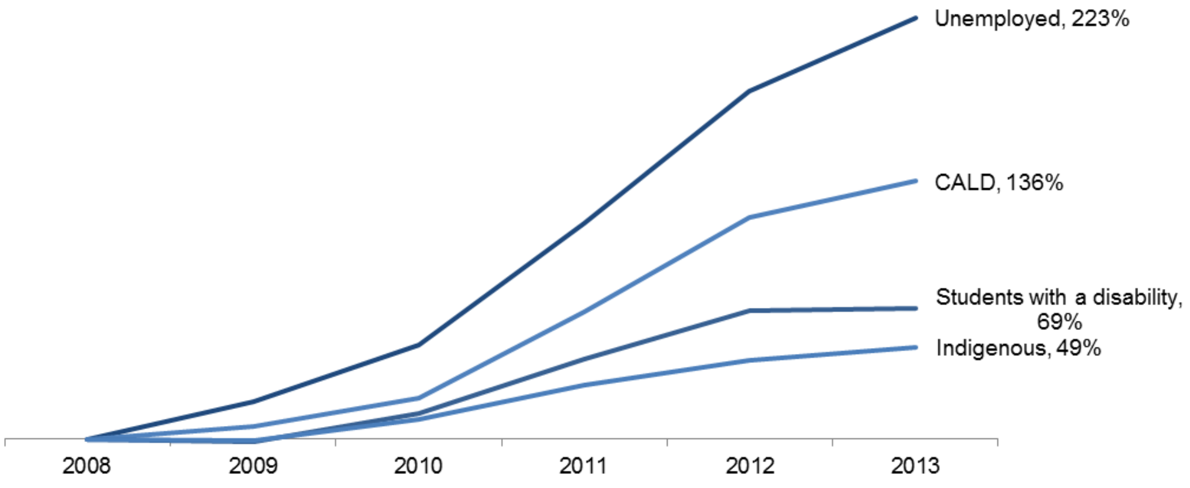
*The above cohorts of students are not mutually exclusive.

Table 2.1.2: Change in numbers of students undertaking Government subsidised training by selected learner cohort*

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Indigenous	49%	16%	5%
Students with a disability	69%	18%	1%
CALD	136%	41%	9%
Unemployed	223%	51%	14%
Aged 15-19 without year 12, not at school and enrolled in Cert II or above	7%	-15%	-16%
Aged 20-64 not holding a Cert III or above	107%	22%	-2%

*The above cohorts of students are not mutually exclusive.

Figure 2.1: Annual percentage growth from 2008 in the numbers of students undertaking Government subsidised training by selected learner cohort



*CALD, Culturally and Linguistically Diverse

Indigenous Students

Enrolments

Key Points

- There were 6,500 Indigenous students enrolled in 8,600 government subsidised courses in 2013.
- Proportionally, 36 per cent of government subsidised enrolments undertaken by Indigenous students in 2013 were in Certificate I to II levels and 52 per cent were at the Certificate III and above.
- Of those enrolments in industry-specific qualifications (5,400 enrolments) which exclude foundation skills and short courses in 2013, 37 per cent were in courses related to specialised or in shortage occupations.

Table 2.2.1: Indigenous students: Government subsidised enrolments by qualification level, 2008 – 2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	3,200	2,500	2,800	3,200	2,900	3,100
Cert III-IV	2,000	2,200	2,300	3,100	3,600	4,000
Diploma & Above	350	400	450	550	600	500
Module Only	850	400	400	400	500	350
Secondary, SoA and other	550	700	650	350	600	750
Total	**7,000**	**6,200**	**6,600**	**7,600**	**8,200**	**8,600**

SoA: Statement of Attainment.

Table 2.2.2: Change in number of government subsidised enrolments undertaken by Indigenous students by qualification level

Qualification level	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	-4%	-3%	7%
Cert III-IV	93%	29%	9%
Diploma & Above	41%	-9%	-16%
Module Only	-63%	-20%	-36%
Secondary, SoA and other	36%	110%	31%
Total	**23%**	**14%**	**5%**

SoA: Statement of Attainment.

Students with a Disability

Enrolments

Key Points

- There were 40,500 students with a disability enrolled in 57,900 government subsidised courses in 2013.
- Forty two per cent of government subsidised enrolments undertaken by students with disability were in Certificate III and above levels.
- Of those enrolments in industry-specific qualifications (27,200 enrolments) which exclude foundation skills and short courses in 2013, 35 per cent were in courses related to specialised or in shortage occupations.

Table 2.3.1: Students with a disability: government subsidised enrolments by qualification level, 2008 – 2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	13,300	11,200	12,400	16,300	20,000	20,900
Cert III-IV	8,600	9,000	11,000	16,500	21,200	20,400
Diploma & Above	3,300	3,600	4,000	4,900	5,000	3,900
Module Only	8,300	8,400	8,300	7,200	7,700	8,700
Secondary, SoA and other	2,800	2,500	2,800	3,200	3,800	4,100
Total	**36,300**	**34,700**	**38,400**	**48,000**	**57,600**	**57,900**

SoA: Statement of Attainment.

Table 2.3.2: Change in number of government subsidised enrolments undertaken by students with a disability by qualification level

Qualification level	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	57%	28%	4%
Cert III-IV	136%	23%	-4%
Diploma & Above	17%	-20%	-22%
Module Only	4%	21%	14%
Secondary, SoA and other	48%	28%	7%
Total	**59%**	**21%**	**0%**

SoA: Statement of Attainment.

Students with a Culturally and Linguistically Diverse (CALD) Background

Enrolments

Key Points

- There were 137,500 students from a CALD background enrolled in 183,500 government subsidised courses in 2013.
- Forty two per cent of government subsidised enrolments undertaken by students with disability were in Certificate III and above levels.
- Of those enrolments in industry-specific qualifications (116,200 enrolments) which exclude foundation skills and short courses in 2013, 45 per cent were in courses related to specialised or in shortage occupations.

Table 2.4.1: Students from a CALD background: government subsidised enrolments by qualification level, 2008 – 2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	19,800	20,100	20,400	28,500	41,600	49,500
Cert III-IV	30,000	30,700	38,500	62,000	88,900	97,700
Diploma & Above	13,400	15,700	17,300	22,400	23,200	19,000
Module Only	13,000	11,600	12,100	11,700	10,700	11,600
Secondary, SoA and other	5,000	5,400	5,400	6,200	8,400	5,600
Total	**81,100**	**83,500**	**93,800**	**130,700**	**172,800**	**183,500**

SoA: Statement of Attainment.

Table 2.4.2: Change in number of government subsidised enrolments undertaken by students from a CALD background by qualification level

Qualification level	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	151%	74%	19%
Cert III-IV	226%	58%	10%
Diploma & Above	42%	-15%	-18%
Module Only	-10%	0%	8%
Secondary, SoA and other	12%	-10%	-33%
Total	**126%**	**40%**	**6%**

SoA: Statement of Attainment.

Unemployed Students

Enrolments

Key Points

- The number of government subsidised course enrolments undertaken by unemployed students in 2013 was 182,700 which were undertaken by 134,800 unemployed students.
- Enrolments in Diploma and above courses undertaken by unemployed students in 2013 were lower than the corresponding figures in 2011 and 2012.
- Of those enrolments in industry-specific qualifications (111,200 enrolments) which exclude foundation skills and short courses in 2013, 38 per cent were in courses related to specialised or in shortage occupations.

Table 2.5.1: Unemployed students: government subsidised enrolments by qualification level, 2008 – 2013

Qualification level	2008	2009	2010	2011	2012	2013
Cert I-II	18,800	21,600	25,700	37,000	54,100	66,800
Cert III-IV	17,400	21,200	30,200	54,500	77,200	87,000
Diploma & Above	9,100	10,700	13,200	16,600	15,700	13,200
Module Only	13,000	11,700	10,600	8,300	7,900	8,800
Secondary, SoA and other	5,300	6,000	6,300	6,500	8,000	6,900
Total	**63,600**	**71,200**	**86,000**	**123,000**	**162,900**	**182,700**

SoA: Statement of Attainment.

Table 2.5.2: Change in number of government subsidised enrolments undertaken by unemployed students by qualification level

Qualification level	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	255%	80%	23%
Cert III-IV	401%	60%	13%
Diploma & Above	44%	-21%	-16%
Module Only	-32%	6%	12%
Secondary, SoA and other	31%	7%	-14%
Total	**187%**	**49%**	**12%**

SoA: Statement of Attainment.

Young People (Aged 15 to 19) without Year 12 or Equivalent and Not at School

Enrolments

Key Points

- The total number of government subsidised enrolments of young people without a Year 12 or equivalent and not in school at Certificate II and above was 29,300 in 2013. This figure is lower than the corresponding figures in 2010, 2011 and 2012.
- Of those enrolments in industry-specific qualifications (24,700 enrolments) which exclude foundation skills courses in 2013, 40 per cent were in courses related to specialised or in shortage occupations.

Table 2.6.1: Youth transition: government subsidised enrolments Cert II and above by students aged 15 to 19 who did not complete Year 12 or equivalent and not at school, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Cert II	8,300	8,600	10,800	12,700	12,000	10,000
Cert III-IV	16,500	15,800	18,400	20,400	22,100	18,700
Diploma & Above	650	800	850	1,800	950	600
Total	**25,500**	**25,200**	**30,000**	**34,800**	**35,100**	**29,300**

Table 2.6.2: Change in number of government subsidised enrolments undertaken by Young People (Aged 15 to 19) Without Year 12 or Equivalent and Not at School by qualification level

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert II	20%	-21%	-17%
Cert III-IV	13%	-8%	-15%
Diploma & Above	-7%	-66%	-39%
Total	**15%**	**-16%**	**-17%**

Students with Low Prior Qualifications

Enrolments

Key Points

- In 2013, there were 260,700 students who were aged 20-64 and not holding a Certificate III or above qualification enrolled in 342,000 government subsidised courses.
- Of those enrolments in industry-specific qualifications (252,600 enrolments) which exclude foundation skills courses in 2013, 41 per cent were in courses related to specialised or in shortage occupations.

Table 2.7.1: Government subsidised enrolments by students aged 20-64 not holding a Cert III or above, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Course Enrolments	164,100	166,200	185,400	271,800	345,700	342,000
Up-Skilling	92,500	100,200	118,600	190,600	251,500	241,100

Up-skilling refers to studying at a higher level than their current qualification.

Table 2.7.2: Change in the number of government subsidised enrolments by students aged 20-64 not holding a Cert III or above

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Course Enrolments	108%	26%	-1%
Up-Skilling	161%	26%	-4%

Up-skilling refers to studying at a higher level than their current qualification.

Foundation Level Training

An efficient and effective training market is vital to provide better outcomes for students and employers, as well as the wider Victorian community. It is particularly important to make sure school leavers and adults without solid literacy and numeracy skills are given the opportunity to acquire them. These skills will greatly improve their chances of employment, provide opportunities for further education and broader social participation.

The latest OECD study on adult literacy and numeracy[6] (Program for the International Assessment of Adult Competencies) suggests that there is a significant proportion of the adult population with very low skills in literacy and numeracy, likely to be of a level to limit their effective participation in the economy: about 14% (or 518,000) of Victorians aged 15-64 had low level of skills (proficiency level 1 or below) in literacy and 22% (or 818,600) had low level of skills in numeracy. These individuals would benefit from foundation type courses.

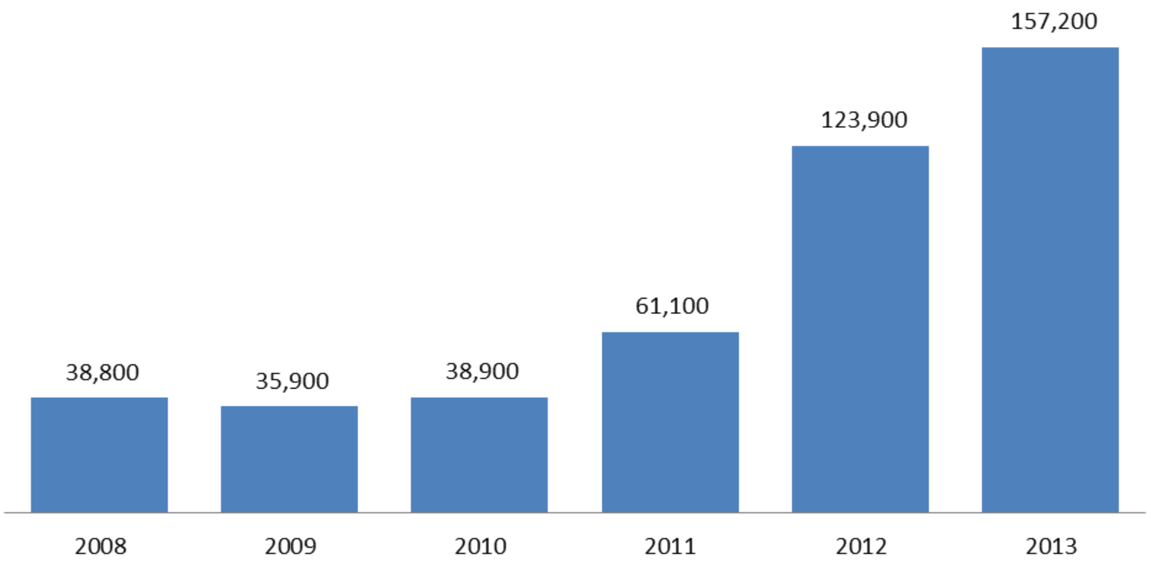
A study undertaken by the Australian Industry Group *Getting it Right: Foundation Skills for the Workforce* found that employers continue to be concerned about the low levels of workplace literacy and numeracy, with 93 per cent of employers identifying some impact on their business.

There were changes in subsidy and VTG arrangements associated with Foundation courses of study at the end of 2013. To ensure a consistent series of data on like courses are reported, a broader definition of "Foundation" is used in this section and in other sections of this report, i.e. Foundation includes Foundation skills, workplace preparation, educational pathways and low level LOTE courses

Key Points

- In 2013 there were 157,200 government subsidised enrolments in foundation skills courses. This was significantly higher than in 2011 and 2012.

Figure 2.3: Government subsidised enrolments in foundation skills courses, 2008 – 2012, 2011, 2012 and 2013



---

[6] Australian Bureau of Statistics (9 October 2013), 42280DO001_201112 Programme for the International Assessment of Adult Competencies, Australia, 2011–12, Table 4 Literacy, Numeracy and Problem solving in technology-rich environments skill level of persons aged 15–64 years, By state or territory of usual residence.

Table 2.8.1: Government subsidised student contact hours in foundation skills courses, 2008-2013

	2008	2009	2010	2011	2012	2013
Student contact hours	9.7	10.4	9.5	14.7	22.6	30.8

Table 2.8.2: Change in government subsidised student contact hours in foundation skills courses

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Student contact hours	217%	110%	36%

Table 2.9.1: Government subsidised students in foundation skills courses by age group, 2008-2013

	2008	2009	2010	2011	2012	2013
15 to 19	10,500	10,800	12,600	19,200	39,400	48,300
20 to 24	4,600	4,100	5,000	8,500	22,500	31,000
25 to 44	15,200	13,100	13,400	20,700	37,300	48,700
45 to 64	7,300	6,700	7,000	11,200	20,400	24,900
Under 15, over 64, not stated	1,300	1,200	1,000	1,400	4,200	4,300
Total	**38,800**	**35,900**	**38,900**	**61,100**	**123,900**	**157,200**

Table 2.9.2: Change in government subsidised students in foundation skills courses by age group

	% change 2008-2013	% change 2011-2013	% change 2012-2013
15 to 19	362%	151%	22%
20 to 24	577%	264%	38%
25 to 44	219%	135%	31%
45 to 64	242%	123%	22%
Under 15, over 64, not stated	244%	197%	1%
Total	**305%**	**157%**	**27%**

Alignment of Training to Industry Skills Needs

Introduction

The demand driven system for vocational training allows businesses, students and training providers to respond to the changing needs of the economy. Over the period between 2012 and 2013 there have been shifts towards training delivered in areas that better meet the training requirements of the Victorian economy. The training market has been dynamic and responsive in seeking to align with these areas of need.

There has been a reduction in courses that experienced unprecedented high levels of enrolments in 2012 that were not aligned with the employment trends of related industries. Challenges remain as government seeks to support apprenticeships in a climate of business contraction in trade related industries as well as managing growth in training areas that are not aligned with industry or student needs such as foundation skills for individuals who already have well developed literacy, numeracy and workplace skills and recognition of prior learning in unlicensed occupations.

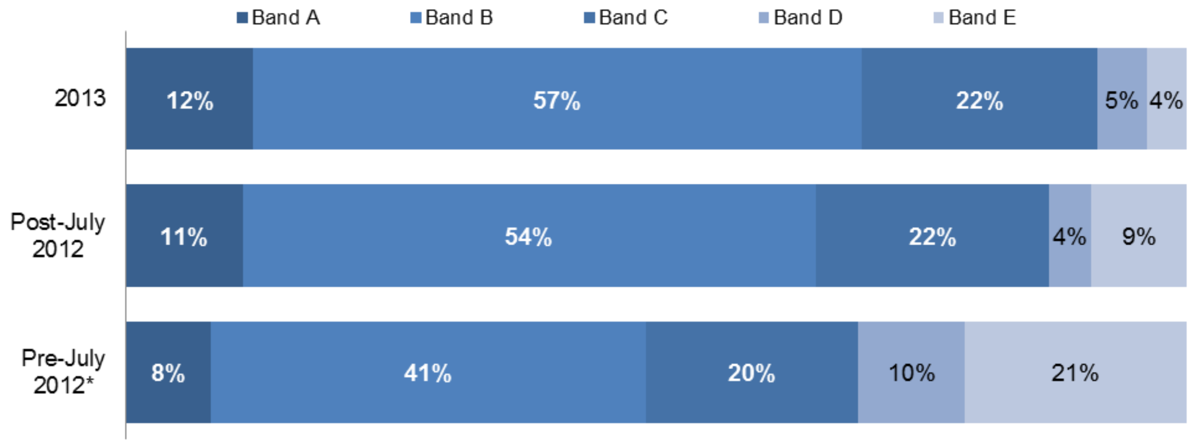
The Victorian Government released the *Refocusing Vocational Training* (RVT) in Victoria reform package in May 2012 to shift training activity to areas of industry and economic need. Under the new subsidy bands, weightings have been refined to apply at the course level to strengthen Government investment in training for specialised skills, training to address skills in shortage, training related to areas of growing employment opportunity and sectors delivering essential services. The reforms also assessed the extent to which government investment is required to stimulate delivery of, and participation in, this training to meet industry needs.

Overall, the highest subsidy levels have been provided to courses where contribution to the economy is assessed as high, and where government subsidy is seen as essential in enabling delivery and participation in training. Lower subsidy levels may indicate evidence of over-supply, or that less government support is required to promote training in these areas. For example, diplomas often attract lower subsidy rates in recognition of the greater private benefits flowing to students from completing these qualifications and because students can access financial support through VET FEE-HELP to meet upfront costs.

Key Points

- Proportionally there has been a marked shift in commencement patterns when comparing 2013 with Pre-July 2012. Data from 2013 shows that 69 per cent of all government subsidised commencing enrolments were within subsidy bands A and B, compared with 49 per cent of commencements in subsidy bands A and B over the same period in 2012. Courses such as the Certificate III in Carpentry, Certificate III in Aged Care, Certificate III in Automotive Mechanical Technology, Certificate III in Driving Operations and the Certificate III in Electrotechnology Electrician are represented in these funding bands.
- Courses with less vocational outcome, or labour market requirement (Band D and E) represented 9 per cent of all government subsidised commencements in 2013. It was 31 per cent over the same period in 2012.

Figure 3.1: Government subsidised commencing course enrolments: proportion of commencing enrolments by subsidy band, Pre-July 2012, 2013, July-December 2012



*Pre-July 2012 refers to January to June 2012. Subsidy bands were introduced in 2012 and apply specifically to qualifications in 2012 and onward. In order to allow comparison with previous years, superseded courses have been assigned a subsidy band for analysis purposes only based on the bands of the current course to which they most closely align.

Enrolments by Industry and Occupation

Enrolments by Industry

Victorian reforms in vocational training enhance the alignment between vocational training and the needs of industry. For students this provides the opportunity for improved career and education pathways and employment outcomes following completion of training. Analysis of vocational training data has shown a good alignment between share of employment and share of training delivery in Victoria's largest industries (also refer to Figure 3.2 for a comparison between employment and enrolment by industry):

- 60 per cent of training was delivered in the six highest employing Victorian industry sectors, which account for 59 per cent of all Victorian jobs - Health Care and Social Assistance, Retail Trade, Manufacturing, Professional, Scientific and Technical Services, Construction and Education and Training.
- There were around 448,100 enrolments in all industry-specific training, including 60,300 enrolments in Cross-industry training, which encompasses a broad range of skills applicable to all Victorian industries.

Figure 3.2: Industry share of Victorian employment and vocational training 2013

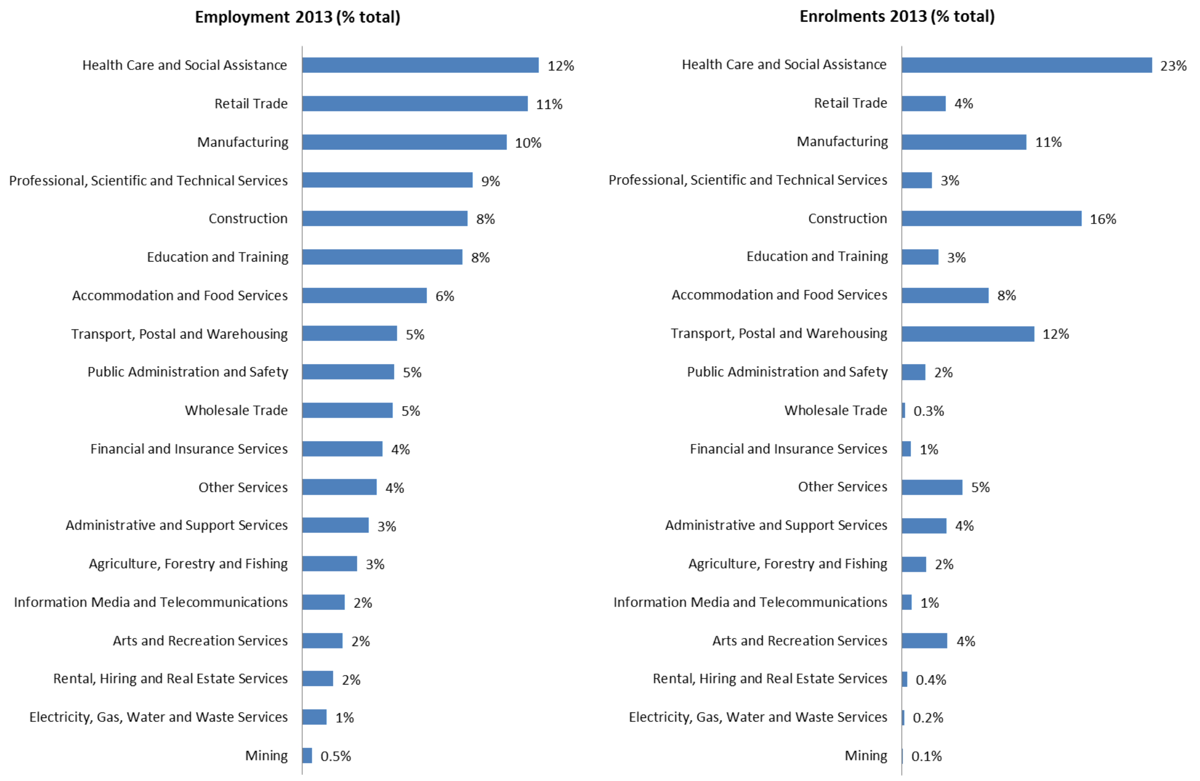


Figure 3.2 shows how training within industries is tracking against employment needs. The following table, Table 3.1, highlights the top enrolling industries. The table shows training in government subsidised qualifications, sorted highest to lowest by 2013 enrolments (excludes foundation training). Rank by industry share of Victorian employment and equivalent 2008 ranks are also displayed.

Table 3.1: Industry-specific[7] training and employment: 2013 vs. 2008

Industry	2013 Enrolments		Training Rank		Employment Rank	
	Number	Share	2013	2008	2013	2008
Health Care and Social Assistance	87,300	23%	1	2	1	3
Construction	62,700	16%	2	1	5	4
Transport, Postal and Warehousing	46,100	12%	3	10	8	8
Manufacturing	43,500	11%	4	3	3	1
Accommodation and Food Services	30,300	8%	5	4	7	7
Other Services	21,100	5%	6	9	12	11
Arts and Recreation Services	15,900	4%	7	7	16	16
Administrative and Support Services	15,600	4%	8	6	13	13
Retail Trade	15,400	4%	9	5	2	2
Education and Training	12,700	3%	10	12	6	5
Professional, Scientific and Technical Services	10,500	3%	11	8	4	6
Agriculture, Forestry and Fishing	8,300	2%	12	11	14	14
Public Administration and Safety	8,100	2%	13	13	9	9
Information Media and Telecommunications	3,300	1%	14	14	15	15
Financial and Insurance Services	3,100	1%	15	15	11	12
Rental, Hiring and Real Estate Services	1,700	0.4%	16	17	17	17
Wholesale Trade	1,000	0.3%	17	17	10	10
Electricity, Gas, Water and Waste Services	800	0.2%	18	16	18	18
Mining	400	0.1%	19	19	19	19
Industry specific training	**387,800**	**100%**				
Cross-industry training*	60,300	-	-	-	-	-
Total industry training	**448,100**	**-**	**-**	**-**	**-**	**-**

Notes:

1. Cross-industry training (e.g. business administration, recordkeeping, computing) has been removed from the industry-specific analysis as this training develops business skills which are transferable across many industry sectors.

2. Employment data has been sourced from Monash CoPS Labour Market Forecasts, 2013.

[7] Industry specific training includes all accredited vocational qualifications at Certificate I and above, but excludes generic training such as foundation skills, education pathways and low-level LOTE courses.

Subsidy bands analysis per industry

The table below shows the top five highest enrolments by industries for each subsidy band.

Table 3.2: Industry-specific training by funding band, 2013

Industry by funding band	2013 Enrolments	% enrolments 2013
Band A		
Construction	42,700	55%
Manufacturing	10,200	13%
Other Services	10,100	13%
Accommodation and Food Services	7,300	9%
Retail Trade	3,100	4%
Other industries	4,000	5%
Total (Band A)	**77,400**	**100%**
Band B		
Health Care and Social Assistance	39,300	26%
Transport, Postal and Warehousing	38,600	26%
Manufacturing	24,000	16%
Construction	14,300	9%
Accommodation and Food Services	8,700	6%
Other industries	26,100	17%
Total (Band B)	**151,000**	**100%**
Band C		
Health Care and Social Assistance	45,200	34%
Cross-industry	33,900	25%
Education and Training	8,700	7%
Administrative and Support Services	6,900	5%
Transport, Postal and Warehousing	5,900	4%
Other industries	32,700	25%
Total (Band C)	**133,300**	**100%**
Band D		
Cross-industry	11,700	32%
Administrative and Support Services	4,600	13%
Retail Trade	4,200	12%
Public Administration and Safety	3,500	10%
Professional, Scientific and Technical Services	2,500	7%
Other industries	9,700	27%
Total (Band D)	**36,200**	**100%**
Band E		
Cross-industry	11,600	33%
Accommodation and Food Services	5,900	17%
Retail Trade	5,600	16%
Arts and Recreation Services	5,500	16%
Manufacturing	3,800	11%
Other industries	2,500	7%
Total (Band E)	**34,900**	**100%**

Key Points

- In 2013, over half of delivery in Band A (apprenticeships and non-apprenticeships) were in the Construction industry. Manufacturing accounted for 13 per cent of all Band A enrolments.
- At 26 per cent respectively, the largest blocks of delivery in Band B were in Health Care and Social Assistance and Transport, Postal and Warehousing.

Enrolments by Occupation

In 2013, the five highest numbers of enrolments within Bands A and B were in courses related to the following occupations:

- Aged or Disabled Carers (18,800 enrolments in 2013)
- Storepersons (15,000 enrolments in 2013)
- Truck Drivers (General) (14,600 enrolments in 2013)
- Engineering Production Systems Workers (13,600 enrolments in 2013)
- Motor Mechanics (8,400 enrolments in 2013)

Employment trends within these occupations are outlined in the table below and show employment numbers in 2012-13, average annual employment needs[8] over the next five years as well as patterns of forecast employment growth to 2017-18. Employment trends indicate growth in four of the five occupational groups related to highest number of courses in Bands A and B. Engineering Productions Systems Workers are forecast to see dampened demand over the next five years. These workers predominantly work in the Manufacturing industry, a critical industry for the Victorian economy undergoing significant industrial transition, and therefore remain a critical area for public investment in vocational training.

Table 3.3: Employment trends in selected occupations (Bands A & B), 2012-13 to 2017-18

Occupation	2012 - 13 Employment Total	Average Annual Employment Needs	Forecast Employment Growth
Aged and Disabled Carers	37,400	2,100	↑
Storepersons	36,100	1,500	↑
Truck Drivers	40,900	1,900	↑
Engineering Production Workers	5,200	400	↓
Motor Mechanics	21,600	1,400	↑

Source: Monash CoPS, Employment Forecasts 2013

The five highest numbers of enrolments within Bands D and E in 2013 were in courses related to the following occupations:

- Office Managers (12,400 enrolments in 2013)
- Sales Assistants (General) (6,900 enrolments in 2013)
- General Clerks (6,800 enrolments in 2013)
- Waiters (5,700 enrolments in 2013)
- Call or Contact Centre Workers (5,300 enrolments in 2013)

As above, Table 3.4 shows employment trends for occupations related to top five highest numbers of enrolments within Band D and E. Characteristic of these occupations in the Victorian labour market are jobs that have high levels of turnover, casual work and mixed employment prospects. Employment of Office Managers, for example, is likely to fall through to 2017-18. Sales Assistants, General Clerks, Call or Contact Centre Workers and Waiters are forecast to see employment growth, however present less of a requirement for vocational training investment made by government to support meeting this labour market need.

[8] Monash Centre for Policy Studies (2012) Employment Forecasting Model.

Average annual employment needs are average replacement demand and employment growth levels from 2011-12 through to 2016-17.

Table 3.4: Employment trends in selected occupations (Band D & E), 2012-13 to 2017-18

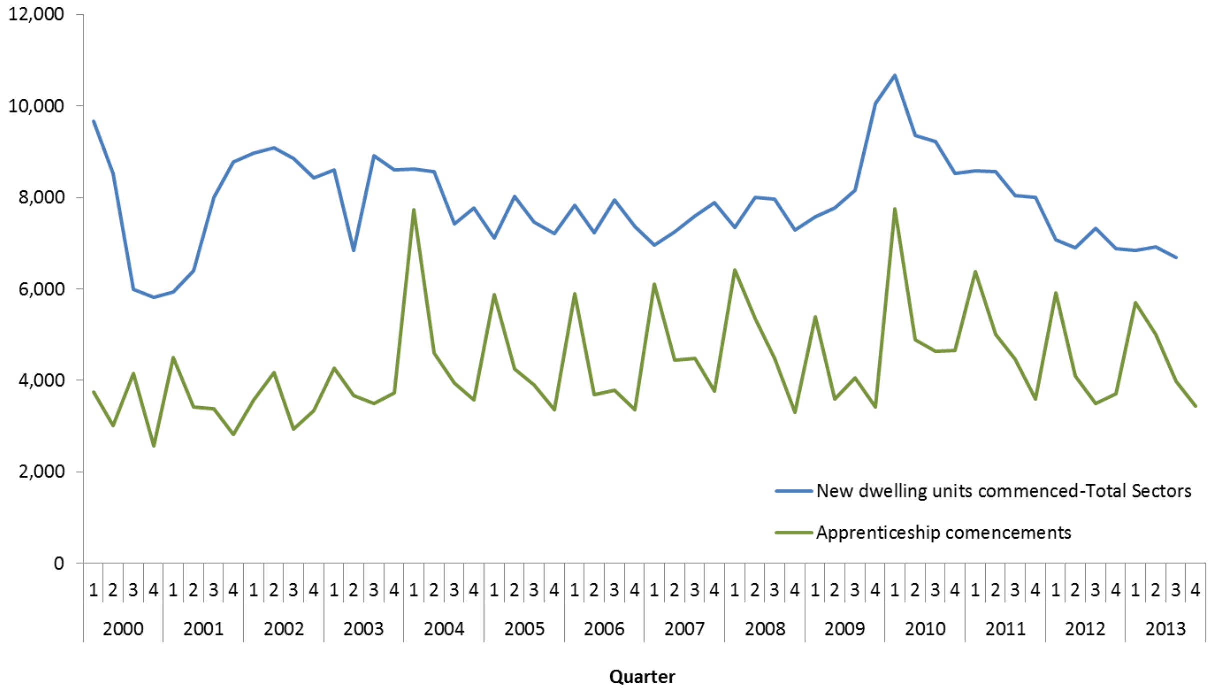
Occupation	2012 - 13 Employment Total	Average Annual Employment Needs	Forecast Employment Growth
Office Managers	28,900	500	⇩
Sales Assistants (General)	141,200	9,000	⇧
General Clerks	43,100	1,900	⇧
Waiters	32,400	2,700	⇧
Call or Contact Centre Workers	7,600	400	⇧

Source: Monash CoPS, Employment Forecasts 2013

Apprentices

Since July 2012 courses such as Apprenticeships, attract government subsidy at the highest level in recognition of current and projected future industry skill needs. Apprenticeships receive the highest level of subsidy, and enrolments for apprenticeships have increased by 3 per cent since 2008. In Victoria just over half (54 per cent) of all Apprentice enrolments in 2013 were in the Construction industry, a sector that has been facing some challenging business conditions over recent years. Apprentice numbers are highly correlated with business conditions and this close relationship is demonstrated in the chart below shows similar overall trends between apprenticeship commencements[9] and new dwelling commencements[10], especially in the last few years.

Figure 3.3: Number of apprenticeship commencements and new dwelling units commenced all sectors 2000 to 2013



[9] Commencements data is sourced from DEECD's DELTA system which is used to manage and monitor training contracts. This data is used for this purpose only as the Victorian Training Market Report is based on VET training activity data.

[10] Australian Bureau of Statistics, Building Activity, Australia, 8752.0 Table 34. Number of Dwelling Unit Commencements by Sector, States and Territories. Latest available data is September 2013.

Table 3.5.1: Government subsidised enrolments by Apprentices by age, 2008–2013

	2008	2009	2010	2011	2012	2013
15 to 19	19,100	18,400	19,400	19,300	17,300	15,200
20 to 24	16,300	16,500	18,100	18,500	18,800	18,200
25 to 44	5,900	6,300	7,100	7,800	8,100	8,500
45 to 64	500	500	600	650	850	1,300
Under 15, over 64, not stated	50	30	20	20	10	30
Apprentices	**41,900**	**41,600**	**45,300**	**46,300**	**45,000**	**43,200**

Table 3.5.2: Change in government subsidised enrolments by Apprentices by age, 2008–2013

	% change 2008-2013	% change 2011-2013	% change 2012-2013
15 to 19	-20%	-21%	-12%
20 to 24	11%	-2%	-3%
25 to 44	43%	10%	5%
45 to 64	159%	92%	53%
Under 15, over 64, not stated	-45%	87%	180%
Apprentices	**3%**	**-7%**	**-4%**

Table 3.6.1: Government subsidised enrolments by Apprentices by qualification level, 2008–2013

	2008	2009	2010	2011	2012	2013
Cert III-IV	41,800	41,500	45,100	46,200	45,000	43,100
Diploma & Above	100	100	100	100	90	70

Table 3.6.2: Change in government subsidised enrolments by Apprentices by qualification level, 2008–2013

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert III-IV	3%	-7%	-4%
Diploma & Above	-30%	-35%	-23%

Table 3.7.1: Government subsidised enrolments by Apprentices by industry, 2008- 2013

	2008	2009	2010	2011	2012	2013
A: Agriculture, Forestry and Fishing	50	40	30	30	50	80
B: Mining	-	-	-	-	-	-
C: Manufacturing	7,300	6,800	6,900	6,700	6,800	6,600
D: Electricity, Gas, Water and Waste Services	200	200	200	250	250	300
E: Construction	20,700	21,800	24,800	26,100	24,700	23,300
F: Wholesale Trade	100	90	100	100	90	40
G: Retail Trade	2,000	1,900	1,900	2,000	2,100	2,000
H: Accommodation and Food Services	3,100	2,800	2,800	2,600	2,700	3,000
I: Transport, Postal and Warehousing	20	10	20	10	10	0
J: Information Media and Telecommunications	30	30	10	0	0	-
K: Financial and Insurance Services	-	0	0	-	-	-
L: Rental, Hiring and Real Estate Services	-	-	-	-	-	-
M: Professional, Scientific and Technical Services	150	150	150	150	150	300
N: Administrative and Support Services	450	450	550	550	450	250
O: Public Administration and Safety	70	90	100	100	100	100
P: Education and Training	-	-	-	-	-	-
Q: Health Care and Social Assistance	100	100	100	100	80	70
R: Arts and Recreation Services	550	550	600	650	650	600
S: Other Services	7,200	6,700	7,000	6,800	6,800	6,500
T: Cross-industry	0	0	0	-	0	-
U: Foundation Skills and LOTE	-	-	-	-	-	-
Not applicable / Unknown	0	-	-	-	-	10
Total	**41,900**	**41,600**	**45,300**	**46,300**	**45,000**	**43,200**

Table 3.7.2: Change in government subsidised enrolments by Apprentices by industry, 2008- 2013

	% change 2008-2013	% change 2011-2013	% change 2012-2013
A: Agriculture, Forestry and Fishing	78%	135%	63%
B: Mining	n/a	n/a	n/a
C: Manufacturing	-9%	-2%	-2%
D: Electricity, Gas, Water and Waste Services	78%	33%	36%
E: Construction	12%	-11%	-6%
F: Wholesale Trade	-60%	-62%	-49%
G: Retail Trade	1%	-2%	-7%
H: Accommodation and Food Services	-2%	14%	10%
I: Transport, Postal and Warehousing	-80%	-73%	-77%
J: Information Media and Telecommunications	-100%	-100%	-100%
K: Financial and Insurance Services	n/a	n/a	n/a
L: Rental, Hiring and Real Estate Services	n/a	n/a	n/a
M: Professional, Scientific and Technical Services	86%	82%	85%
N: Administrative and Support Services	-38%	-53%	-44%
O: Public Administration and Safety	55%	3%	-9%
P: Education and Training	n/a	n/a	n/a
Q: Health Care and Social Assistance	-26%	-32%	-16%
R: Arts and Recreation Services	7%	-7%	-8%
S: Other Services	-9%	-4%	-5%
T: Cross-industry	-100%	n/a	-100%
U: Foundation Skills and LOTE	n/a	n/a	n/a
Not applicable / Unknown	200%	n/a	n/a
Total	**3%**	**-7%**	**-4%**

Trainees

Traineeships have increased by 8 per cent since 2008. However, when compared to 2011 and 2012, there has been a decline in enrolments in Traineeships in 2013. The decline is primarily driven by a fall in enrolments in courses that now attract subsidy at the lowest level (band E), where there was unprecedented high level of enrolments that did not match employment trends for related industries. The reduction in traineeship enrolments is also attributable to changes to Commonwealth government incentives[11].

The chart below shows that the decline is predominantly from courses that attract the lowest subsidy (band E) which are deemed to have less vocational outcome or labour market requirement and reflect the oversupply in training that was being delivered. Courses in this group are such as Certificate II in Retail, Certificate III in Retail, Certificate III in Hospitality, Certificate III in Process Manufacturing, and Certificate III in Customer Contact. There was a spike in these courses in 2012 and the 2013 reductions need to be seen in this context. In contrast there have been increases in enrolments in Traineeships that now attract subsidy at band B, reflecting industry need for graduates from these courses.

Figure 3.4: Government subsidised traineeship enrolments by funding band, 2011 – 2013

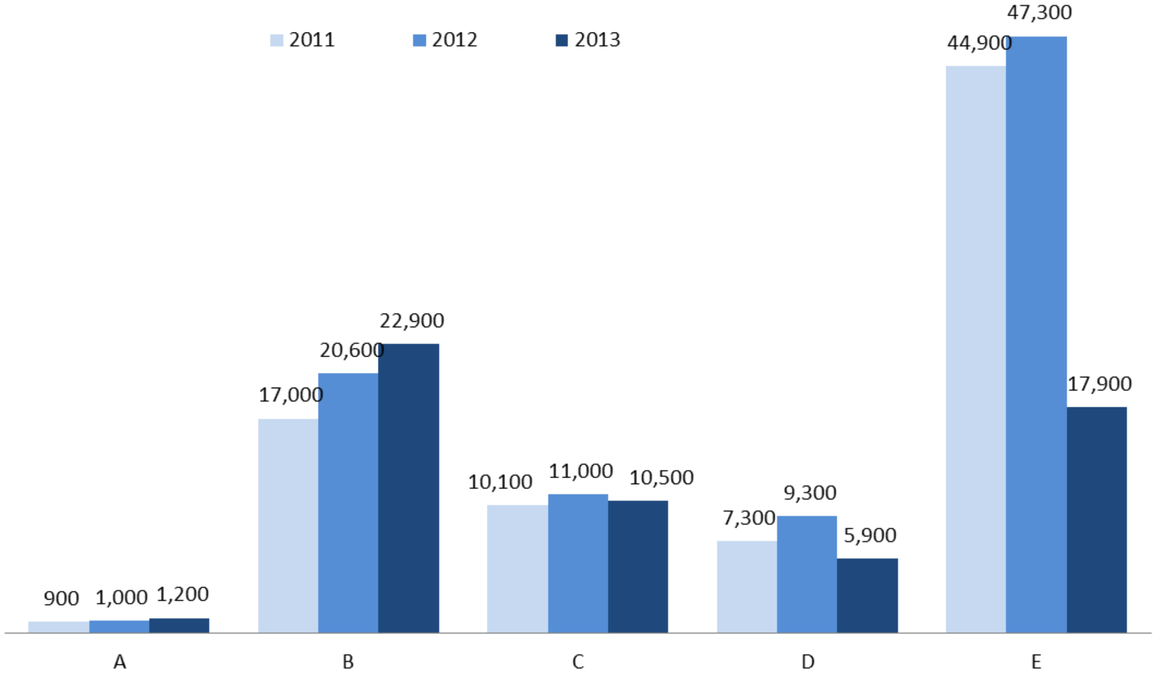


Table 3.8.1: Government subsidised enrolments by Trainees by age, 2008–2013

	2008	2009	2010	2011	2012	2013
15 to 19	21,300	20,800	22,700	26,100	25,500	14,400
20 to 24	12,900	11,000	12,500	15,300	15,500	9,800
25 to 44	14,500	12,400	14,800	24,600	29,600	20,400
45 to 64	4,800	4,600	6,500	13,600	18,000	13,300
Under 15, over 64, not stated	600	450	300	600	700	500
Trainees	**54,000**	**49,200**	**56,900**	**80,200**	**89,300**	**58,400**

[11] The NCVER publication Apprentices & Trainees, Early trend estimates March Quarter 2013, noted that at a national level "The substantial growth in non-trade commencements up to the June quarter 2012 and the subsequent decline in the September quarter is predominately due to changes to Commonwealth incentive payments for existing workers, namely the removal of the commencement incentive payment for those apprenticeships and traineeships not on the National Skills Needs List. Under the changes, training needed to have commenced prior to 1 July 2012 to attract the old subsidy rate."

Table 3.8.2: Change in Government subsidised enrolments by Trainees by age, 2008–2013

	% change 2008-2013	% change 2011-2013	% change 2012-2013
15 to 19	-32%	-45%	-43%
20 to 24	-24%	-36%	-37%
25 to 44	41%	-17%	-31%
45 to 64	177%	-3%	-26%
Under 15, over 64, not stated	-18%	-13%	-25%
Trainees	**8%**	**-27%**	**-35%**

Table 3.9.1: Government subsidised enrolments by Trainees by qualification level, 2008–2013

	2008	2009	2010	2011	2012	2013
Cert I-II	10,200	11,100	11,700	8,900	4,200	2,600
Cert III-IV	42,600	36,800	42,500	62,900	72,100	49,300
Diploma & Above	1,100	1,300	2,700	8,400	13,000	6,500

Table 3.9.2: Change in government subsidised enrolments by Trainees by qualification level, 2008–2013

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Cert I-II	-75%	-71%	-39%
Cert III-IV	16%	-22%	-32%
Diploma & Above	517%	-22%	-50%

Table 3.10.1: Government subsidised enrolments by Trainees by industry, 2008- 2013

	2008	2009	2010	2011	2012	2013
A: Agriculture, Forestry and Fishing	1,000	1,100	1,100	1,700	2,100	2,500
B: Mining	40	50	20	20	30	90
C: Manufacturing	3,500	3,100	4,900	10,900	14,400	12,900
D: Electricity, Gas, Water and Waste Services	150	150	100	200	300	200
E: Construction	550	350	400	700	900	950
F: Wholesale Trade	100	100	200	450	550	300
G: Retail Trade	14,900	13,300	15,000	18,300	18,300	7,300
H: Accommodation and Food Services	8,000	7,900	8,500	10,100	10,700	5,600
I: Transport, Postal and Warehousing	3,400	2,600	3,100	5,200	6,500	6,000
J: Information Media and Telecommunications	150	150	150	150	150	300
K: Financial and Insurance Services	200	350	400	550	550	550
L: Rental, Hiring and Real Estate Services	250	250	250	350	400	250
M: Professional, Scientific and Technical Services	350	250	250	300	350	250
N: Administrative and Support Services	6,700	4,600	5,700	7,200	6,600	4,000
O: Public Administration and Safety	200	80	60	50	100	250
P: Education and Training	450	400	350	500	450	1,100
Q: Health Care and Social Assistance	6,100	6,400	6,700	7,500	7,800	6,700
R: Arts and Recreation Services	1,800	2,300	2,200	2,700	2,600	1,000
S: Other Services	650	650	550	550	500	300
T: Cross-industry	5,400	5,100	6,800	12,800	16,200	7,800
Trainees	54,000	49,200	56,900	80,200	89,300	58,400

Table 3.10.2: Change in government subsidised enrolments by Trainees by industry, 2008- 2013

	% change 2008-2013	% change 2011-2013	% change 2012-2013
A: Agriculture, Forestry and Fishing	153%	49%	17%
B: Mining	127%	481%	174%
C: Manufacturing	268%	18%	-10%
D: Electricity, Gas, Water and Waste Services	8%	-20%	-38%
E: Construction	73%	32%	1%
F: Wholesale Trade	141%	-39%	-49%
G: Retail Trade	-51%	-60%	-60%
H: Accommodation and Food Services	-29%	-44%	-47%
I: Transport, Postal and Warehousing	75%	16%	-7%
J: Information Media and Telecommunications	97%	88%	82%
K: Financial and Insurance Services	164%	4%	2%
L: Rental, Hiring and Real Estate Services	5%	-33%	-35%
M: Professional, Scientific and Technical Services	-19%	-15%	-20%
N: Administrative and Support Services	-40%	-44%	-39%
O: Public Administration and Safety	17%	390%	153%
P: Education and Training	151%	121%	149%
Q: Health Care and Social Assistance	10%	-11%	-13%
R: Arts and Recreation Services	-44%	-62%	-60%
S: Other Services	-52%	-41%	-32%
T: Cross-industry	45%	-39%	-52%

Training in Specialised and In-Shortage Related Occupations

Vocational training delivery that is meeting the skill requirements of industry is a core focus of the Refocusing Vocational Training reforms. In particular, training related to occupations identified as specialised or experiencing skill shortages that[12] enhance the productive capacity of the Victorian economy are a high priority for government investment.

'Specialised occupations'[13] are defined as occupations that have a long lead-time for training, high economic value and a significant match between training and employment.

'Skill shortages'[14] 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 in reasonably accessible locations.

Note: all data in this section is for government subsidised training by onshore domestic students in accredited AQF qualifications excluding foundation skills, education pathways and low-level LOTE courses.

Key Points

Trends in 2013 indicate a refocusing of the training market towards a higher proportion of training delivery against most critical occupations:

- 184,400 enrolments in qualifications related to specialised or in shortage occupations in 2013.
- In 2013, 41 per cent of training was for occupations which are either specialised or in shortage. In 2012 this figure was 32 per cent.
- Marked difference between critical specialised or skill shortage occupations (14 per cent growth over 2012 - 2013) compared to non specialised or skill shortage training (23 per cent decrease).
- Although, historically TAFE providers have delivered the majority of training in qualifications related to specialised or in shortage occupations, 2013 saw a marked increase in delivery across the whole training market with TAFE accounted for 47 per cent of training related to critical occupations and private RTOs accounted for 48 per cent of training.
- The largest rise in specialised and skill shortage enrolments compared to 2012 has been in qualifications under Band A (up by 49 per cent).

[12] To ensure the most robust alignment with vocational outcomes in the government funded training sector this section is limited to:

- government subsidised training to onshore domestic students
- training in accredited AQF qualifications at Certificate I and above i.e. short courses, non-award courses and non-accredited training is excluded
- excludes courses which cannot be classified directly[12] to an employment outcome in a particular occupation, such as training in generic foundation skills such as literacy and numeracy

[13] Australian Workforce and Productivity Agency (2012) specialised occupation list.

[14] HESG (2012) Skills Shortage list. Skill shortage definition from DEEWR Skills Shortage List

Figure 3.5: Government subsidised training delivery by responsiveness category

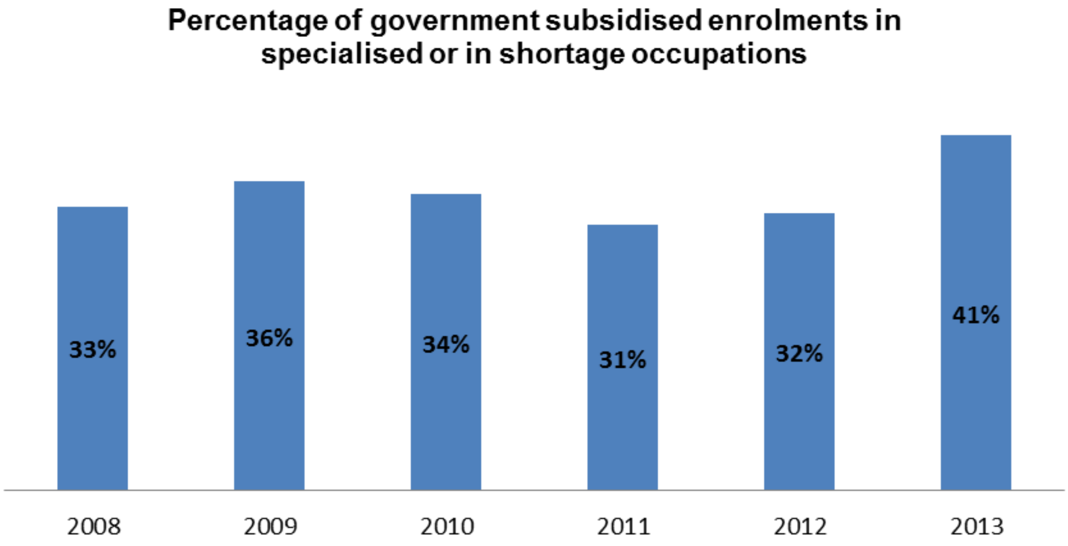


Figure 3.6: Government subsidised enrolments in specialised or skill shortage occupations per training provider type, 2011, 2012 and 2013

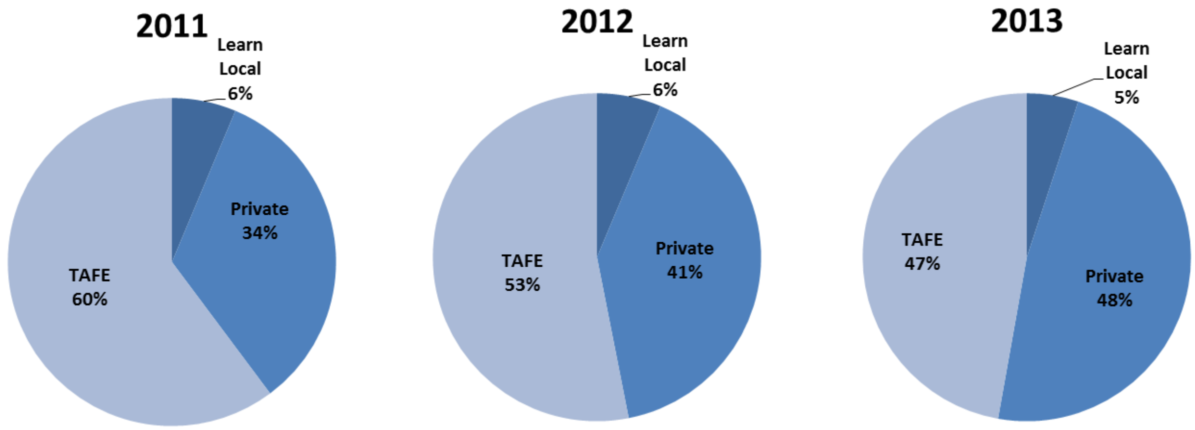


Table 3.11.1: Government subsidised training delivery for qualifications aligned to either specialised or skill shortage occupations, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Enrolments	91,000	102,200	115,800	136,200	162,100	184,400
Hours (millions)	28.4	33.5	38.7	43.9	54.4	66.7

Note: Enrolment numbers rounded to nearest 100.

Table 3.11.2, Government subsidised training delivery for qualifications aligned to either specialised or skill shortage occupations

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Enrolments	103%	35%	14%
Hours (millions)	135%	52%	22%

Table 3.12.1: Government subsidised training delivery for qualifications not aligned to specialised or skill shortage occupations, 2008 – 2013

	2008	2009	2010	2011	2012	2013
Enrolments	185,100	182,900	221,000	306,600	343,200	263,700
Hours (millions)	46.9	49.2	61.8	86.3	109.8	83.6

Note: Enrolment numbers rounded to nearest 100.

Table 3.12.2, Change in Government subsidised training delivery for qualifications not aligned to specialised or skill shortage occupations

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Enrolments	42%	-14%	-23%
Hours (millions)	78%	-3%	-24%

Table 3.13.1: Government subsidised training delivery for qualifications aligned to specialised occupations, 2008 - 2013

	2008	2009	2010	2011	2012	2013
Enrolments	56,500	58,800	64,200	71,100	79,500	90,300
Hours (millions)	16.5	19.5	20.8	21.4	25.5	34.7

Note: Enrolment numbers rounded to nearest 100.

Table 3.13.2, Change in Government subsidised training delivery for qualifications not aligned to specialised or skill shortage occupations

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Enrolments	60%	27%	14%
Hours (millions)	111%	62%	36%

Table 3.14.1: Government subsidised training delivery for qualifications aligned to skill shortage occupations, 2008 - 2013[15]

	2008	2009	2010	2011	2012	2013
Enrolments	78,400	91,200	105,300	127,600	151,800	174,600
Hours (millions)	25.1	29.4	35.0	41.0	50.6	62.2

Note: Enrolment numbers rounded to nearest 100.

Table 3.14.2, Change in Government subsidised training delivery for qualifications not aligned to specialised or skill shortage occupations

	% change 2008-2013	% change 2011-2013	% change 2012-2013
Enrolments	123%	37%	15%
Hours (millions)	148%	-1%	23%

Table 3.15.1: Top 10 enrolling specialised or in shortage occupations, 2011, 2012 and 2013

Occupation	2008	2009	2010	2011	2012	2013
Child Carers	7,300	9,000	14,300	19,700	25,600	30,100
Aged and Disabled Carers	6,400	8,200	8,800	13,000	16,900	20,400
Truck Drivers	2,600	4,400	4,600	7,500	10,600	14,600
Welfare Support Workers	4,500	5,200	6,200	7,800	9,500	11,600
Motor Mechanics	5,400	4,900	5,000	5,300	6,700	8,400
Carpenters and Joiners	7,600	7,900	8,600	9,100	8,000	8,000
Electricians	6,700	6,900	7,900	7,700	7,800	7,700
Enrolled and Mothercraft Nurses	4,600	4,800	5,300	6,400	7,200	7,600
Plumbers	5,000	5,400	6,300	7,100	7,200	7,100
Cafe and Restaurant Managers	2,400	5,200	4,500	6,300	9,200	6,500
All other occupations	38,500	40,300	44,200	46,300	53,300	62,400
Total	**91,000**	**102,200**	**115,700**	**136,200**	**162,000**	**184,400**

Note: Enrolment numbers rounded to nearest 100.

Table 3.15.2: Change in top 10 enrolling specialised or in shortage occupations, 2011, 2012 and 2013

Occupation	% change 2008-2013	% change 2011-2013	% change 2012-2013
Child Carers	315%	53%	18%
Aged and Disabled Carers	220%	58%	21%
Truck Drivers	467%	94%	37%
Welfare Support Workers	158%	49%	22%
Motor Mechanics	57%	60%	26%
Carpenters and Joiners	5%	-12%	0%
Electricians	14%	-1%	-2%
Enrolled and Mothercraft Nurses	64%	18%	5%
Plumbers	42%	0%	-2%
Cafe and Restaurant Managers	173%	2%	-30%
All other occupations	270%	93%	19%
Total	103%	35%	14%

[15] Historical enrolment numbers for qualifications aligned to skills shortage occupations reported in the 2013 Training Market Report are lower than those reported in the 2012 Training Market Report. This is due to changes made to occupational alignment to courses. In particular, changes made to coding for Certificate III in Electrotechnology Systems Electrician is the main driver behind the discrepancy. The course now aligns to the occupation Electrician (Special Class) which is not classified as a skills shortage occupation, whereas it was previously aligned to Electrician (General) which is classified as a shortage occupation.

The following table highlights industry enrolments in qualifications related to either specialised or in shortage occupations

Table 3.16: Industry enrolments in qualifications related to either specialised or in shortage occupations

Industry	Enrolments (Total industry specific qualifications)						Enrolments (specialised OR in shortage)					
	Share 2013	2011	2012	2013	% 2011 - 2013	% 2012 - 2013	Share 2013	2011	2012	2013	% 2011 - 2013	% 2012 - 2013
Accommodation and Food Services	7%	35,500	44,600	30,300	-15%	-32%	6%	8,000	11,800	10,900	36%	-8%
Administrative and Support Services	3%	20,600	21,600	15,600	-24%	-28%	-	-	-	-	-	-
Agriculture, Forestry and Fishing	2%	9,500	9,800	8,300	-13%	-15%	0.4%	600	600	700	17%	17%
Arts and Recreation Services	4%	27,500	26,700	15,900	-42%	-40%	1%	800	700	1,300	63%	86%
Construction	14%	47,700	51,900	62,700	31%	21%	24%	33,700	37,100	44,700	33%	20%
Cross-industry e.g. project managers	13%	81,500	91,000	60,300	-26%	-34%	1%	3,800	3,300	2,100	-45%	-36%
Education and Training	3%	10,200	10,100	12,700	25%	26%	2%	6,200	5,700	3,900	-37%	-32%
Electricity, Gas, Water and Waste Services	0.2%	1,000	1,000	800	-20%	-20%	0.3%	800	800	600	-25%	-25%
Financial and Insurance Services	1%	6,700	6,300	3,100	-54%	-51%	0.0%	-	100	100	-	0%
Health Care and Social Assistance	19%	61,400	77,600	87,300	42%	13%	43%	55,300	70,300	79,500	44%	13%
Information Media and Telecommunications	1%	3,800	3,900	3,300	-13%	-15%	0.3%	500	500	500	0%	0%
Manufacturing	10%	33,700	41,700	43,500	29%	4%	5%	8,600	8,900	10,000	16%	12%
Mining	0.1%	300	500	400	33%	-20%	-	-	-	-	-	-
Other Services	5%	19,500	21,100	21,100	8%	0%	4%	4,700	5,900	7,400	57%	25%
Professional, Scientific and Technical Services	2%	12,400	12,100	10,500	-15%	-13%	2%	3,100	3,100	3,200	3%	3%
Public Administration and Safety	2%	7,900	8,400	8,100	3%	-4%	0.2%	400	400	300	-25%	-25%
Rental, Hiring and Real Estate Services	0.4%	1,600	2,300	1,700	6%	-26%	-	-	-	-	-	-
Retail Trade	3%	33,200	36,000	15,400	-54%	-57%	1%	1,400	1,800	2,400	71%	33%
Transport, Postal and Warehousing	10%	28,000	38,000	46,100	65%	21%	9%	8,300	11,100	16,600	100%	50%
Wholesale Trade	0.2%	900	900	1,000	11%	11%	-	-	-	-	-	-
Total	**100%**	**442,900**	**505,500**	**448,100**	**1%**	**-11%**	**100%**	**136,200**	**162,100**	**184,200**	**35%**	**14%**

Note: Numbers rounded to nearest 100.