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Victorian Other Services Industry

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Introduction

In the context of Victoria's dynamic economy, a demand-led approach is the best way to ensure a responsive vocational training system that will help as many people as possible build skills that lead to better jobs. This is most evident in the results of the market approach embodied in the Victorian Training Guarantee, which has achieved positive outcomes for both students and the economy.

The *Refocusing Vocational Training in Victoria* reforms are designed to satisfy important criteria for a strong vocational training market. Through these reforms the Government is ensuring that the vocational training system continues to produce positive outcomes for students, businesses and Victoria.

Through *Refocusing Vocational Training*, there is a role for Government in monitoring, providing information and responding to the performance of the vocational training system. A key mechanism by which the government exercises this role is through the Industry Participation Model. The Industry Participation Model is based on a new partnership approach between Government, industry and training providers. It increases industry influence within the training market by supporting more direct relationships between industry and training providers and by increasing direct consultation with Government.

An aim of the Industry Participation Model is to seek to improve information sharing about training provision, options, outcomes, gaps and associated barriers between industry, training providers and employers to improve alignment between industry needs and training delivery. A suite of information products and tools are being developed, of which this report is one, to support this aim and an overview of these are provided overleaf.

This report describes training and economic activity and developments related to Victoria's Other Services industry, bringing together a range of qualitative and quantitative insights from desk research and industry engagement. It highlights both the challenges the industry faces in attracting the right skills, and the opportunities businesses, training providers and government have to address these challenges. Key metrics used in this report include enrolments by sub-industry, qualification level, occupation, courses, age group, gender, learners facing barriers, provider type, reason for study and completions. The report also covers apprentices and trainees, and an analysis of the alignment between training delivery and specific industry skills needs. The report produces industry, sub-industry and region-specific findings and, wherever possible, presents comparisons to developments at the State level.

The purpose of this report is:

1. To provide a basis for understanding the Other Services sector in relation to employment levels, skills shortage occupations, current alignment and responsiveness of the vocational training market to the needs of the sector and to provide an overview of the challenges and opportunities in meeting industry vocational skills needs both now and into the future.
2. To give detailed information around vocational training enrolments by occupation, location, qualification levels and other student characteristics, as it relates to the Other Services industry sector in order to gauge current trends in vocational training delivery.
3. To summarise the context of the Other Services sector in relation to the size and scale of the labour and training markets as well as the current policy, economic and social drivers that it is facing.

Suite of Information Products & Tools		
Victorian Quarterly Training Market Reports On-going series of quarterly reports aimed at providing a summary of Victorian training market performance following the introduction of the student entitlement system. The report covers three sections – the first provides an overview of the performance of the Victorian training market, the second section examines the participation of learners facing barriers and the third examines the alignment of training to industry skills needs http://www.education.vic.gov.au/training/providers/market/Pages/reports.aspx	**Vocational Training: Victoria's Regional Report** Annual publication examining 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 the local training system and regional skills needs, training market performance and responsiveness http://www.education.vic.gov.au/training/providers/market/Pages/regionaltrends.aspx	**Vocational Training: Victoria's Industry Report** Published annually, this report combines industry intelligence and economic analysis with training data to build a more complete picture of the relationship between industry skills needs, employment opportunities and skills training. Each of the 19 industry training profiles provide economic context and a summary of training challenges and highlights from IPM initiatives http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx
Industry Sub-sector summary reports & Industry Factsheets 46 sub-sector industry summary reports produced annually highlight industry labour and training market dynamics with an overview of current and forecast employment needs and vocational training patterns across the sectors and at the regional level A series of factsheets are also available for 19 industries http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx	**Business Toolkit and Case Studies** Toolkit for employers providing information on how to get government-subsidised training under the Victorian Training Guarantee; getting the best training for your business, with a helpful checklist; information of Recognition of Prior Learning; and a range of interesting employer and training provider case studies http://www.education.vic.gov.au/training/employers/workforce/Pages/marketfacilitation.aspx	**Portfolio Industry Reports** These reports describe training and economic activity and developments related to key Victoria's industry sectors. Highlighted are both the challenges the industry faces in attracting the right skills, and the opportunities businesses, training providers and government have to address these challenges. A range of key workforce and training metrics are also provided. There are two tiers of reports; detailed reports representing the focus industries for the Department in 2013, and summary reports covering other industry sectors http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx
Industry Blog A forum for people interested in industry skills and training issues in Victoria, the blog features a range of topics relevant to stakeholders, information on recent industry events, groups and forums and new initiatives focused on enhancing market performance through facilitation activities http://skillsblogvic.wordpress.com/	**Industry Skills Update - e-Alerts** Regular email update featuring the latest news about IPM activities; market facilitation and related government initiatives; reports; and training performance information To subscribe contact: Department of Education & Early Childhood Development, skills.online@edumail.vic.gov.au	**Web Pages – Industry Training Market Information** 19 webpages with information about the skills and training market for industry sectors. For each industry, there's a training snapshot, information about skills in demand, training market intelligence reports and factsheets along with more detailed reporting for each industry sub-sector. Information is updated regularly http://www.education.vic.gov.au/training/employers/industry/Pages/marketinfo.aspx
Rate Your Training Ratings tool for industry and employers which is a simple-to-use system where employers can rate the performance of a training provider in a particular study area against selected criteria, and review and compare the ratings of other employers http://rateyourtraining.com.au/	**E-Marketplace (in development)** Website which facilitates connections between employers and training providers. Employers can anonymously post their training requirements and training providers are able to provide structured response online. Employers are then able to review the response with no obligation, create a shortlist and follow up directly with their preferred providers	**Victorian Skills Gateway** One-stop-shop of Victorian vocational education and training to help find the best option for students. Searches can be performed on occupations, courses, training providers, video and written case studies. This website is also viewable via a purpose-built smartphone interface http://www.education.vic.gov.au/victorianskillsgateway/Pages/home.aspx

Industry and data scope

This section summarises the scope of the Other Services Industry[1] as well as key data sources.

Products and services

The Other Services industry includes a broad range of personal services; religious, civic, professional and other interest group services; selected repair and maintenance activities; and private households employing staff. Businesses in this division are mainly engaged in providing a range of personal care services, such as hair, beauty, diet and weight management services; providing death care services; promoting or administering religious events or activities; or promoting and defending the interests of their members.

Also included are businesses mainly engaged in repairing and/or maintaining equipment and machinery (primarily automotive) or other items; as well as units of private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of households.

Data

The main source of data on vocational training activities is the training activity database referred to as SV Training System (SVTS).

The report presents findings for the time period from 2008 to 2013, with an in depth analysis of developments and patterns in the 2013 calendar year. Data was extracted from SVTS as at March 2014 and subject to revision.

This report includes government subsidised vocational training enrolments only. Data on completions contain all government subsidised and fee for service enrolments at any course level by all providers.

Training 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. Any percentages are calculated based on the original, unrounded data.

Figure 1.1: Other Services ANZSIC breakdown

ANZSIC code	ANZSIC industry	
94	Repair and Maintenance	
	941	Automotive Repair and Maintenance
	942	Machinery and Equipment Repair and Maintenance
	949	Other Repair and Maintenance
95	Personal and Other Services	
	951	Personal Care Services
	952	Funeral, Crematorium and Cemetery Services
	953	Other Personal Services
	954	Religious Services
	955	Civic, Professional and Other Interest Group Services
96	Private Households Employing Staff and Undifferentiated Goods- and Service-Producing Activities of Households for Own Use	

[1] As defined by the Australian Bureau of Statistics, Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006.

Other Services trends and issues

This section focuses on the Other Services Industry as a whole. It covers: the key issues and challenges including economic conditions, new regulations, demographic changes, changing social attitudes, new technology/processes, changing consumer tastes, environmental sustainability and the direction of industry restructuring.

Key messages, issues and challenges

- Although the Automotive Repair and Maintenance segment benefited from the increase in older vehicles on the road as a result of dampened consumer spending during the global economic crisis, the sector now faces a slow-down in demand as a result of technological advances in the manufacture of vehicles which has improved reliability and durability.
- Investment in electronic diagnostic equipment could be of benefit given the shift in consumer preferences towards greener and hybrid cars, and newer vehicles with increasing levels of computer technology on-board. However, the industry is likely to face further consolidation in the future as smaller operators are squeezed out of the market by larger franchises that are able to offer a wider range of services and economies of scale in access to both domestic and foreign vehicle parts.
- The Hairdressing and Beauty Services segment is characterised by a large number of small operators with low barriers to entry resulting in high employee churn rates. While hairdressing remains the largest element of the sector, and the most stable, there are increasing opportunities for other beauty services to capitalise on the anti-ageing trend, and increased levels of service take-up from men. The sector faces growing competition from hotels, airports and day spas offering similar services, but population increases mean that growth in industry revenue is forecast for the next five years.
- The Other Services industry covers a range of other segments, some of which are facing a more certain future than others. For example, the Laundry and Dry Cleaning industry is benefiting from the trend towards outsourcing laundry from the Health, Accommodation and Hospitality sectors, whilst the demand for repair services for household and other goods is declining as the cost between replacement and repair narrows.
- Across Victoria, the Other Services sector is estimated to be worth around $7.4 billion to the State economy, with a workforce of approximately 107,000 workers, representing 3 per cent of Victorian employment.
- Growth in output is expected to be in line with the average across all industries overall, and is currently forecast at 13 per cent over the five years to 2017-2018.
- At the end of 2012, it was estimated that there were 21,900 businesses in the sector operating in Victoria, with 53 per cent operating in relatively small businesses employing between 1 and 19 staff. A higher than average percentage of firms are in the mid-ranges of turnover ($50,000 - $2 million per year).
- Businesses are concentrated in the suburbs of Melbourne, with major concentrations outside of the city in Geelong and Ballarat.

Industry trends and outlook

The following tables outline the industry trends and drivers for the main areas of activity within the Other Services sector of particular importance to vocational training delivery.

Automotive-Related Repair and Maintenance
• The Automotive repair industry is characterised by a large number of small businesses, but there are a number of large franchises that are expanding operations and increasing their presence in the market. • In the aftermath of the global financial crisis, companies involved in repair services for the Automotive industry did well, as consumers postponed purchases of newer vehicles, meaning that there was a greater need for the servicing, maintenance and repair of older cars. However, looking forwards, expected growth in new vehicle sales, will lead to a fall in the average age of cars being driven, and a likely slowdown in demand for repair services. • Technological developments have led to more durable and better quality vehicles. This trend is expected to continue over the next five years. However, with the introduction of greener vehicles, such as hybrids and alternative fuel vehicles, there could be a new wave of repair work for these products as they are tested out. Investing in electronic diagnostic equipment and solutions for more modern cars could create a new growth phase for the industry further down the line. • Another important trend for the industry is the increasing customer preference for imported vehicles. This may prove detrimental to small operators, who find it more difficult to obtain foreign vehicle parts than the larger franchises. • Demand for Automotive Body, Paint and Interior Repair services has also declined as cars have become safer, and the number of accidents on the road has reduced. This has resulted in industry restructuring due to over-capacity, which will continue to persist over the next five years. Inefficient and small owner-operators will be more likely to leave the industry, while chain operators (particularly those with preferential agreements with insurance companies) will continue to gain market share. • As the stock of registered vehicles increases, there is, however, more potential demand for auto-electrical services and repairs. New cars are also a growing source of revenue as a number of electrical and electronic component upgrades are conducted during the purchase process; and marine engines and air conditioning are also expanding fields for automotive electricians. The mining industry however, also competes for skilled workers in this sector, and has poached a number of qualified automotive electricians from the industry; exacerbating skills shortages among qualified auto electricians.

Hair and Beauty Related Services

- Shifting consumer preferences have contributed to the growth or decline of different segments of Hairdressing and Beauty Services over the past five years. Haircutting and styling services, where growth has remained relatively stable, account for the majority of industry revenue and have the largest influence on industry performance – this is the one part of the sector that provides a necessary service, as opposed to a luxury one. Segments such as hair restoration and electrolysis (a form of hair removal) have also performed strongly, while the share of the solarium tanning segment has declined due to a combination of regulatory changes and media coverage of the dangers involved.
- As many of the sector's services are discretionary, demand wanes when there is economic uncertainty or when employment levels falter.
- The industry is highly fragmented with low barriers to entry. As a result, it is highly competitive, with a large number of small operators and high entry and exit rates. The battle for customers has put downward pressure on prices, forcing many operators out of the industry. Competition is increasing as day spas, hotels and even airports have begun offering a range of hair and beauty services. Some hair salon franchises are seeking to cater to time-poor consumers by offering services at smaller and more convenient kiosk-style stores in well-situated, but high-rent, locations such as shopping centres.
- The industry is expected to continue to perform moderately over the next five years. Two of the main drivers for growth are likely to be men with higher grooming standards and those seeking to slow the ageing process. However, price competition is expected to constrain revenue growth in the industry.
- Population increases (especially among women) create demand. In addition, the trend among young to middle-aged males to spend more on their appearance is growing and represents the industry's greatest opportunity (males currently represent only 19 per cent of revenue). Furthermore, the line between beauty and health-related treatments is blurring, with the emergence of nutraceuticals and cosmeceuticals, for example, and the growing awareness of relaxation therapies.

Other Repair and Personal Services

- The Other Repair and Maintenance segment caters to a highly fragmented and diverse range of products such as the repair of household appliances, footwear, air conditioners and electrical heating. The nature of contemporary consumerism – typified by rapid technological change, frequent upgrades and new product introductions – has meant that the role of repair services is approaching near redundancy, as once products are out of the warranty period, the gap between the cost of replacement and repair have narrowed. The speed of technological change is also rendering many products obsolete much more quickly. This trend of replacement over repair has forced, for example, many shoe repair businesses to offer a range of other services such as key cutting, engraving and other leather product repairs.
- The Religious Services segment in Australia is facing unprecedented change. While Catholic adherers have remained at around a steady 30 per cent of the population, other Christian religions have suffered a drop-off in numbers. This overall decline has led to the closure and consolidation of a number of churches, as attendance at services declines, with the associated fall in revenue. However, as immigration continues, there has been a rise in the numbers of Hindus, Buddhists and Muslims; and combined, 7 per cent of the Australian population (in 2011) is a follower of one of these three faiths, up from 5 per cent in 2001. Religious organisations continue to play a strong role in supporting new migrants as they enter the country.
- The Laundry and Dry Cleaning segment is typified by the outsourcing of services by health, accommodation and hospitality businesses, and these corporate clients now account for a much greater share of revenue than they did ten years ago. Price-based competition on supply contracts has been fierce over recent years due to the nature and structure of the sector, which includes many small and medium-size operators. Environmental factors are expected to become increasingly important to the industry's performance, particularly in the areas of chemical, water and energy use, and in relation to climate change factors and carbon emissions controls.
- Wedding celebrants have enjoyed consistent growth over the past five years, as the number of secular weddings in Australia has risen. Likewise, the proliferation of internet dating websites has caused revenue to surge for the Introductory Services segment. Some segments, though, are subject to increased competition from other industries. For example, demand for babysitters has been affected by government policies that provide subsidies for parents to send their children to registered childcare centres, although demand for services has increased as the trend and need for both parents to work continues.
- Industry Associations and representative groups for individual professions have performed well over the last five years, although some associations with ties to declining industries have suffered as memberships and funding have declined. Rapidly improving communications technology has led to an influx of smaller firms entering the industry, while large associations have exploited economies of scale and increasing membership revenue to improve services, offering a national network of connections to promote policy in the interests of their members. The industry's productivity is expected to increase over the next five years as technology is employed to a greater degree and more volunteers are used. This is especially the case for smaller, niche organisations, which will likely attempt to increase their traction through more targeted marketing and activism via the internet.

Sources: various IBISWorld reports, 2013 and 2014

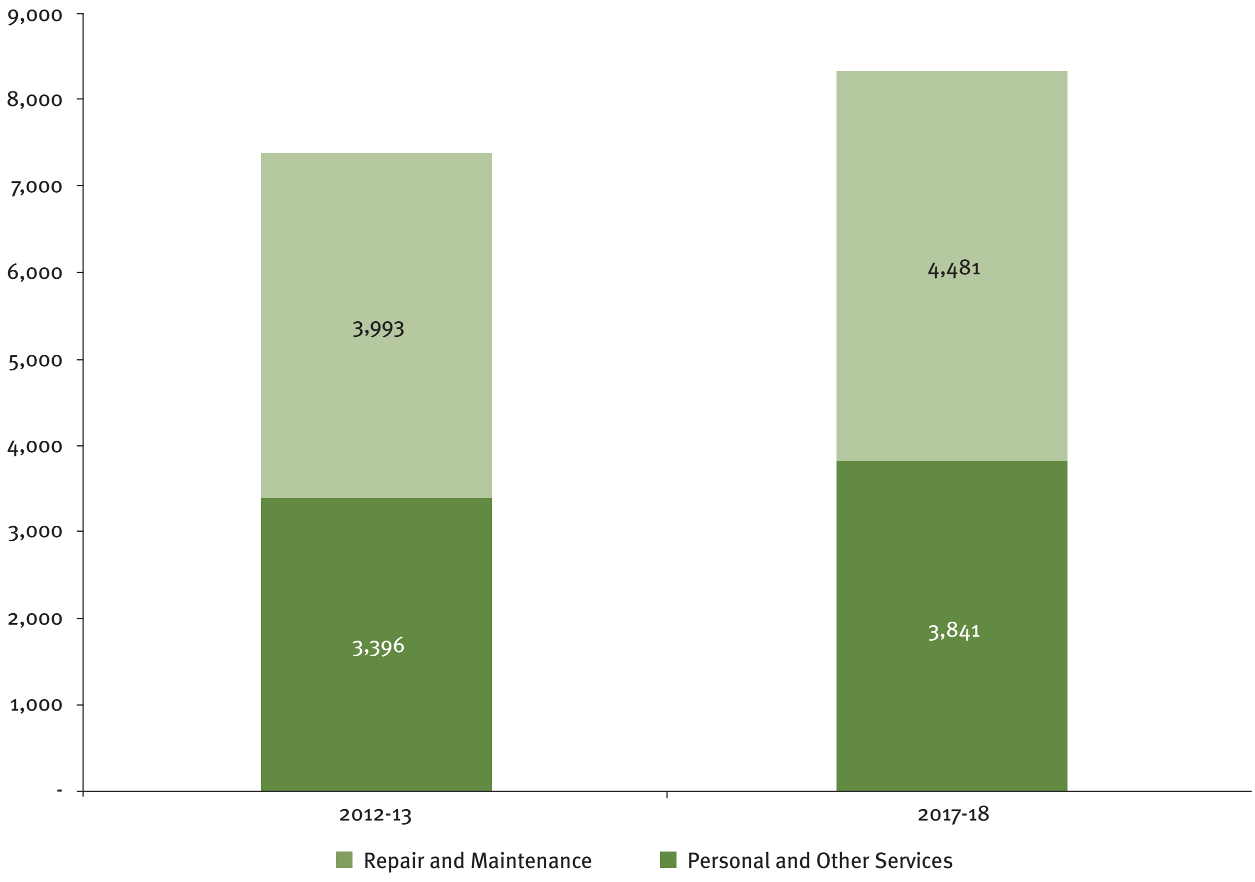
Economic contribution

Victoria's Other Services industry contributed approximately $7.4 billion to the state economy in 2012-13, around 3 per cent of total output. The industry directly employs approximately 107,000 workers, representing 3 per cent of Victorian employment.

Looking forward, output growth of 13 per cent is anticipated in the five years to 2017, to around $8.4 billion. This is slightly below the anticipated state growth rate of 14 per cent across all Victorian industries. The industry has seen an expansion in output in the five years to 2012-13 of 24 per cent. The largest sub-sector in terms of output remains Personal and Other Services.

A highly skilled workforce leads to increased productivity and economic growth. High quality education and skills training is essential for Victorians to access the opportunities of a growing and changing economy, and an increasingly sophisticated and information-rich society.

Figure 2.1: Other Services output ($million), Victoria, 2012-13 and 2017-18

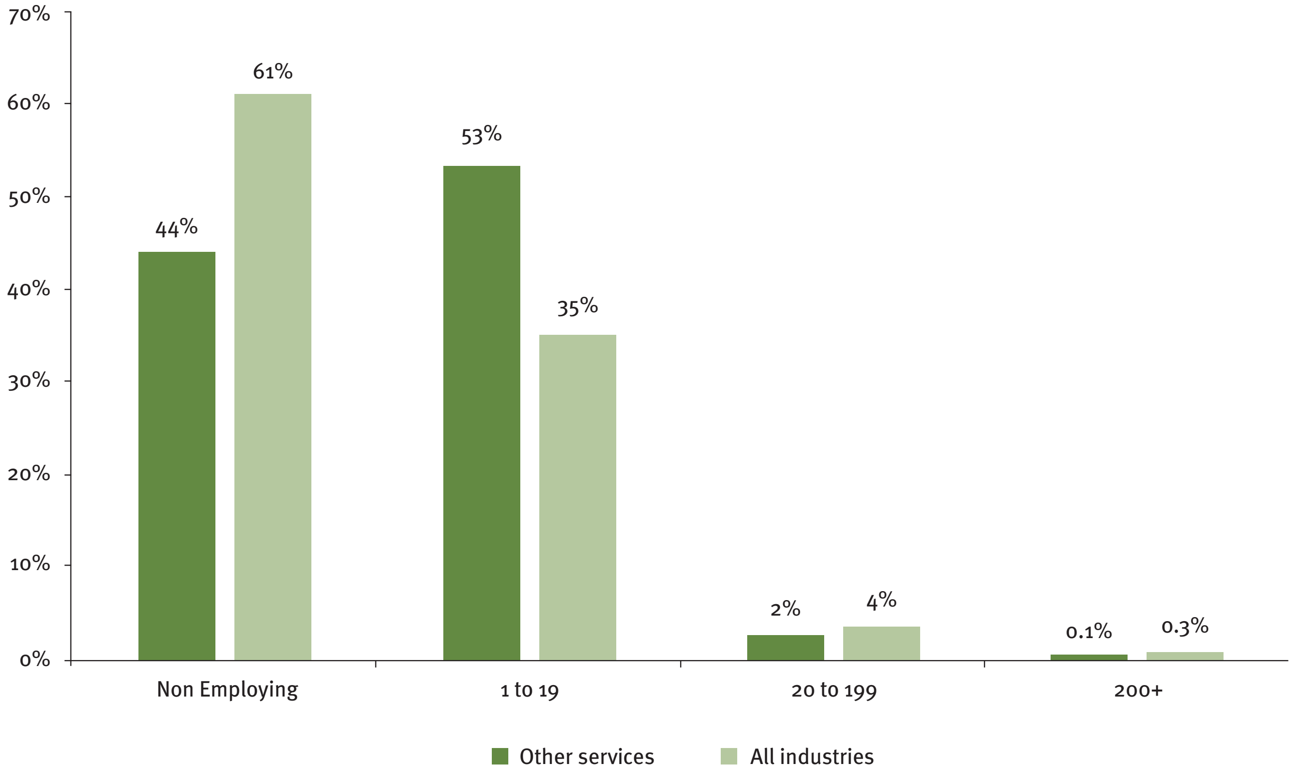


Source: Monash Centre of Policy Studies (CoPS) Employment Forecasts, June 2013

Employer profile

The distribution of Other Services businesses by employment level is skewed towards small sized employing businesses (between 1 and 19 employees). Fifty-three per cent of all Other Services businesses employ between 1 to 19 employees compared with an all-industry average of 35 per cent. Non-employing businesses comprise a smaller proportion of Other Services businesses when compared with the all-industry average (44 per cent compared with 61 per cent). Only 24 companies employed more than 200 workers.

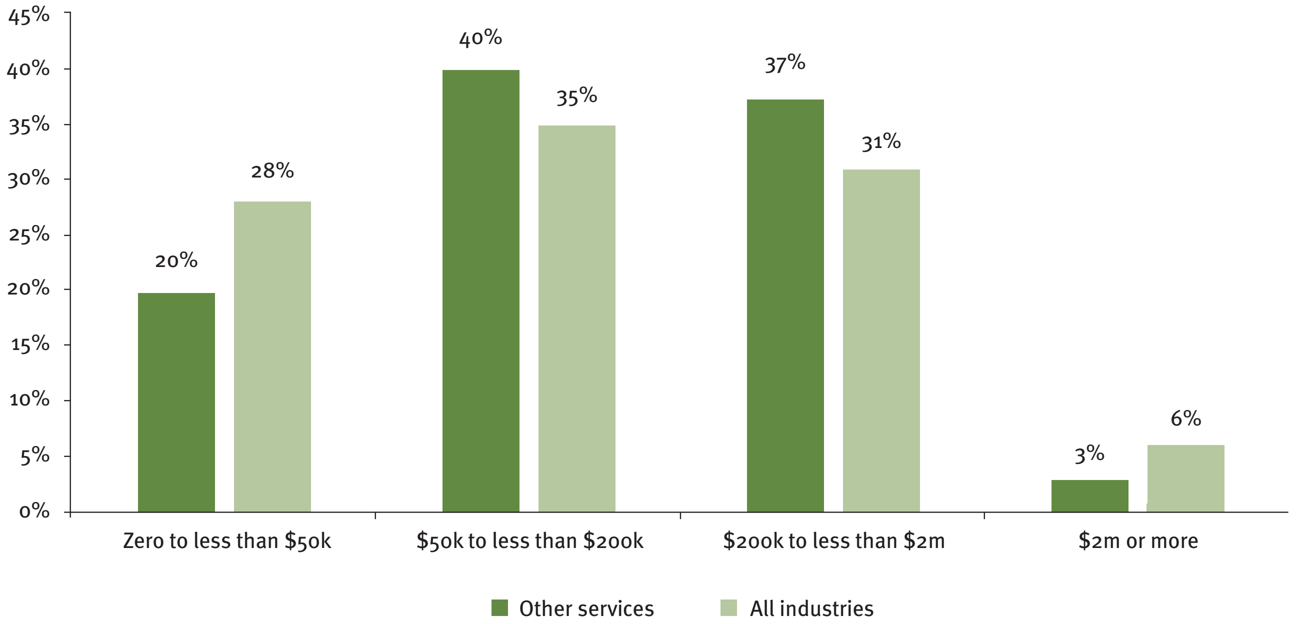
Figure 2.2: Share of businesses by employment, Victoria, 2012



Source: Australian Bureau of Statistics (ABS), Count of Australian Businesses, including entries and exits, 2012

With regards to turnover, Victoria's Other Services industry businesses are more likely to be in the middle ($50,000 to $2,000,000) range of turnover, with 40 per cent of businesses in this range of turnover.

Figure 2.3: Share of businesses by turnover size, Victoria, 2012



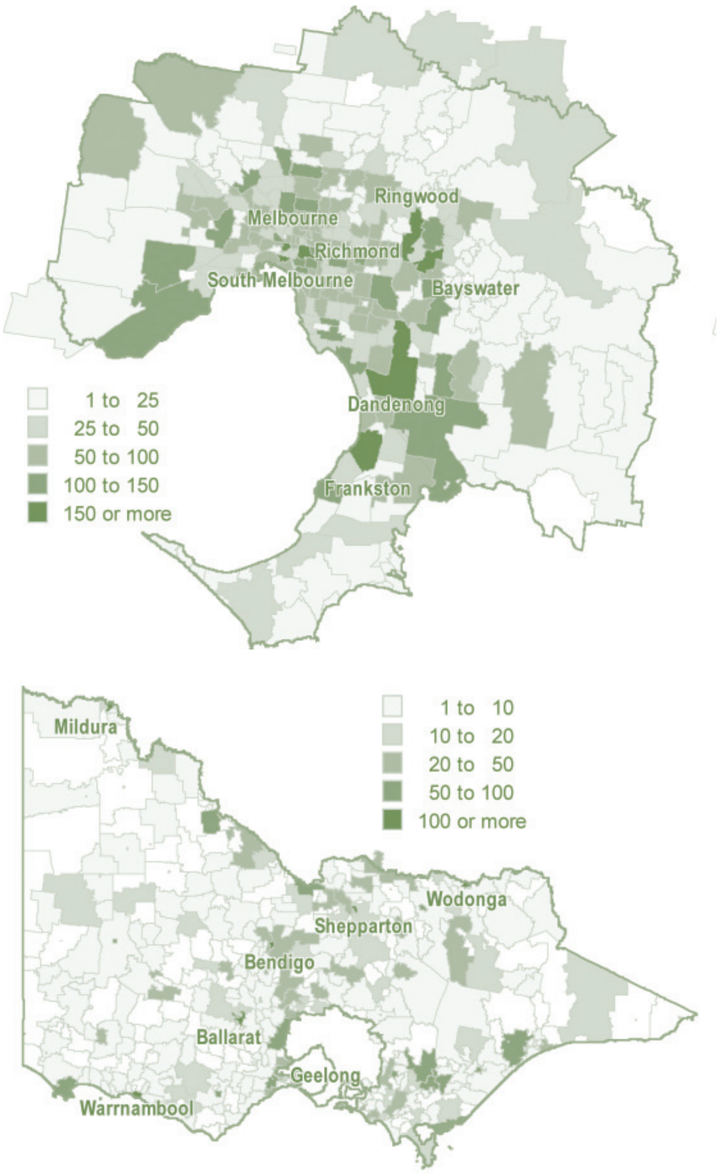
Source: Australian Bureau of Statistics (ABS), Count of Australian Businesses, including entries and exits, 2012

Just over 50 per cent of the Other Services establishments are in the Hairdressing, Automotive Repair and Maintenance subsectors. These are consumer-driven businesses and they are broadly spread throughout Melbourne's suburbs where residential populations have ready access to them.

In regional Victoria, Other Services establishments tend to have their largest concentrations in the major regional population centres. In 2010-11, the largest concentrations of business establishments were in Geelong (662) and Ballarat (293), the two largest centres of regional population. In terms of net change over the 10 years to 2010-11, the area around Geelong, the Macedon Ranges and the Surf Coast (Torquay) experienced the largest net growth in business establishment numbers.

Other Services business establishments also increased along the peri-urban boundary in the townships of Romsey and Gisborne to the north-west of Melbourne, and the townships in the Surf Coast area near Geelong, including Torquay.

Figure 2.4: Location of Other Services industry establishments in metropolitan and regional Victoria, 2010-11



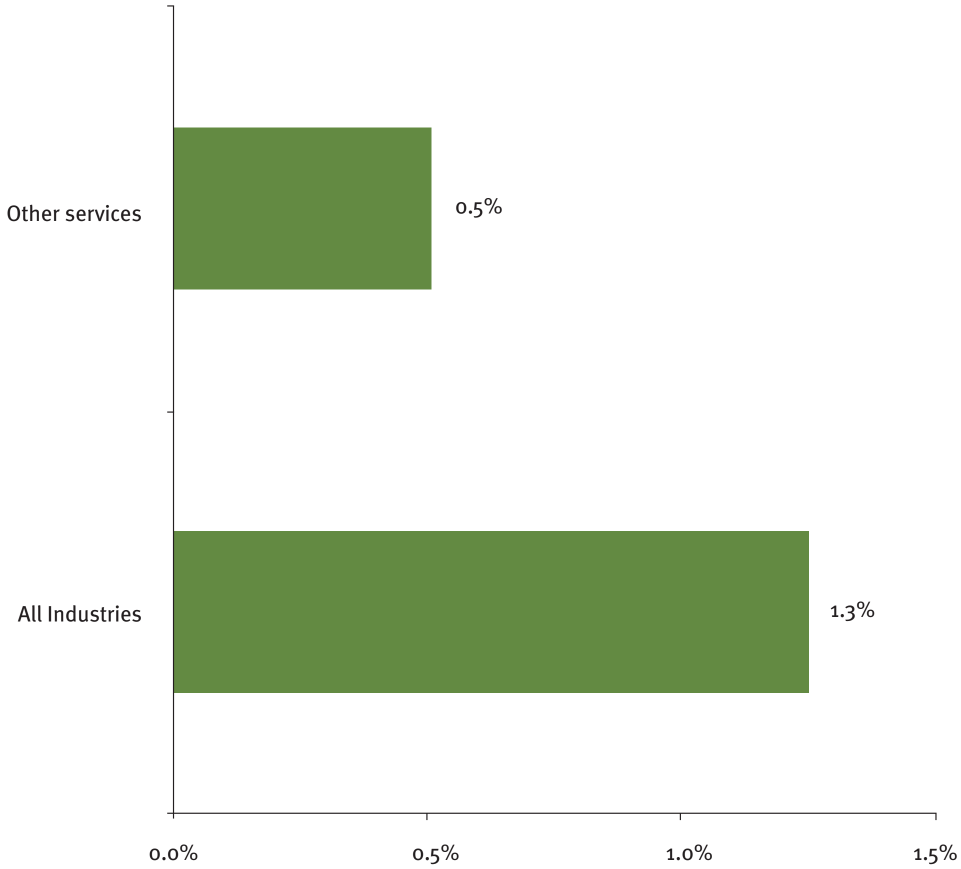
Source: Department of State Development, Business and Innovation, Personal and Other Services. Business location in Victoria: A decade of change, October 2012 (based on data from WorkSafe Victoria)

Labour productivity

Labour productivity is defined as real gross value added per hour worked. The figure below shows the average annual compound rate of growth in labour productivity for the Other Services industry over the period 2003 to 2013. Nationally the average compound annual growth rate of labour productivity for Other Services was 0.5 per cent, below the all industries average of 1.3 per cent.

Up-skilling the workforce continues to be an important focus for increasing productivity, and producing more with less. A well-trained, job-ready workforce is the life-blood of Victoria's industry and business and the largest determinant of productivity in the State's economy.

Figure 2.5: Labour productivity measure by gross value added (GVA) per hour worked, average annual growth, Australia, 2003-2013



Source: Australian Bureau of Statistics (ABS), Australian System of National Accounts, 5204.0

Other Services workforce and skills

This section focuses on the Other Services industry's workforce. It covers employment levels and trends, as well as workforce characteristics such as age and skill level.

Key messages, issues and challenges

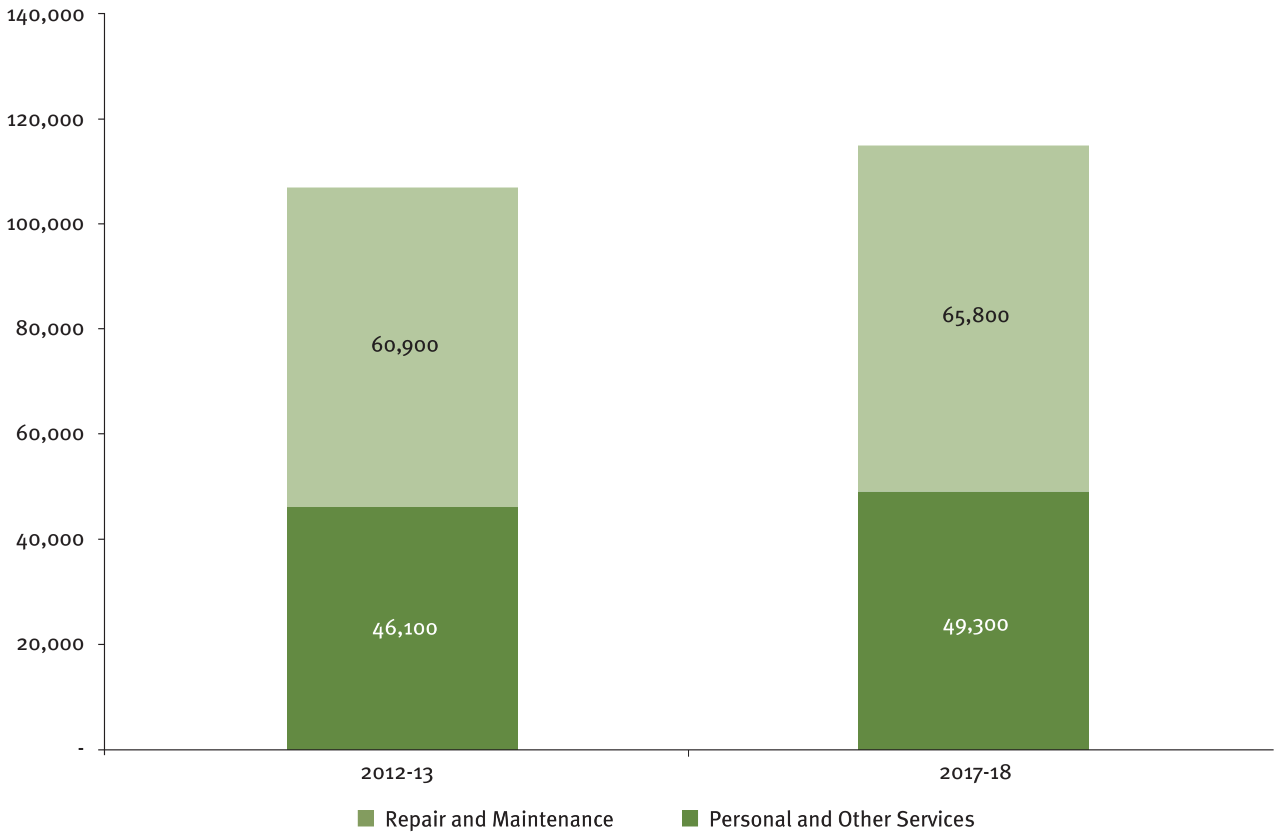
- Approximately 107,000 people are employed in Victoria's Other Services industry.
- Employment growth has been flat between 2007-08 and 2012-13. However, employment is forecast to grow by around 8 per cent (8,200 employees) over the five years to 2018.
- The industry's workforce has a fairly similar age profile compared with the all industries' average.
- The Other Services workforce comprises 54 per cent male workers compared with 46 per cent female. This is in line with the average gender split across all Victorian industries.
- A large proportion of the Other Services industry workforce (36 per cent) has Certificate III or IV qualifications, twice the 'all-industry' average of 18 per cent. Over time the skill composition of the industry has been shifting towards more highly skilled workers, a trend which is expected to continue into the future.
- Changing technology is a major driver of future skills needs in the Automotive Repair and Maintenance sector. However, consolidation in certain parts of the industry, coupled with competition from other industries for certain occupations (such as Automotive Electricians) means that there are a number of skills shortages currently faced by the sector.
- Four occupations directly aligned to the Other Services industry – Motor Mechanic, Panel Beater, Vehicle Painters and Automotive Electricians – are considered to be experiencing skills shortages in Victoria. These occupations have also been identified as specialised occupations.
- Within the Personal and Other Services sub-sector, a mismatch has been identified between the skills available and the skills demanded by businesses – specifically in Hairdressing. This is in part attributed to changes in the way training is undertaken, with a move away from apprenticeships towards short-courses reducing industry experience, as well as competition from other occupations deemed comparable in wage terms, but less demanding in terms of effort.
- The Beauty industry is experiencing rapid growth in new products and technologies aimed at solutions such as anti-ageing and hair-loss reduction. Some of these technologies come with a level of risk, and workers in these occupations require up-skilling and a significant increase in product knowledge.
- Many hair and beauty salons are small enterprises whereby the owner/manager has a number of different roles to play. As well as frequently providing a service directly to the client, such as a beauty treatment; salon owners also have to market and financially manage their businesses – skills which require development in an increasingly competitive market where business entry and exit churn is considerable.
- A quality, highly-skilled workforce is therefore critical to the success of businesses in the Other Services industry, and the industry continues to face significant challenges in meeting its workforce needs.

Employment

Approximately 107,000 people are employed in Victoria's Other Services industry. The industry has seen employment growth of 5 per cent between 2007-08 to 2011-12 (around 5,100 employees), but this growth has been offset by a decline in employment of around 5 per cent (or 5,300 employees) over the year to 2013. The outlook over the next five years is for employment to increase by approximately 8 per cent (or 8,200 employees).

'Personal and Other Services' is the largest employing sub-sector and is forecast to add around 4,900 jobs between 2012-2013 and 2017-2018.

Figure 3.1: Other Services employment, Victoria, 2012-13 and 2017-18

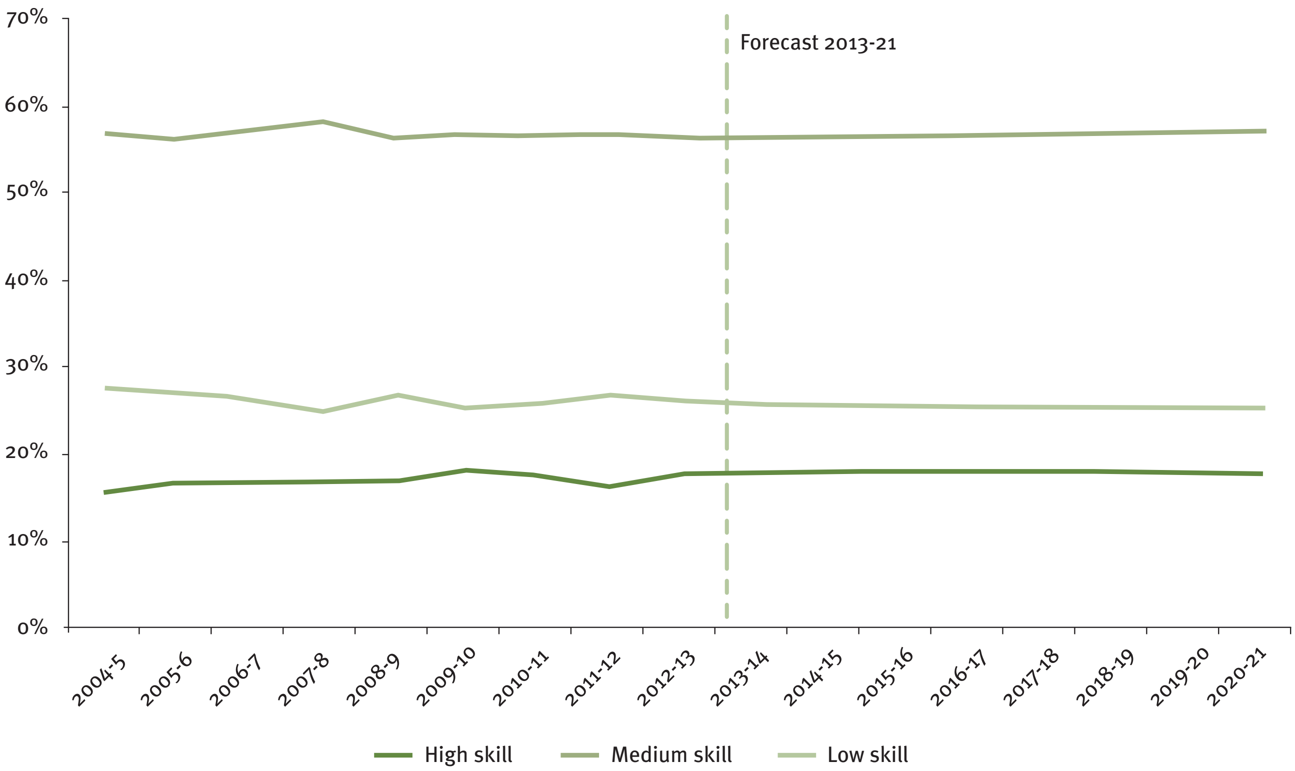


Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

Skills composition

The Other Services sector's high skill and low skill roles show a divergent pattern – high skilled roles as a percentage of the overall workforce are increasing over time. By 2020-21 high skill roles are forecast to constitute 18 per cent of the workforce up from 16 per cent in 2004-05. Low skill roles are forecast to drop to 25 per cent from 28 per cent of the total workforce over the same period.

Figure 3.2: Other Services industry skill levels, Victoria, 2004-05 to 2020-21



Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

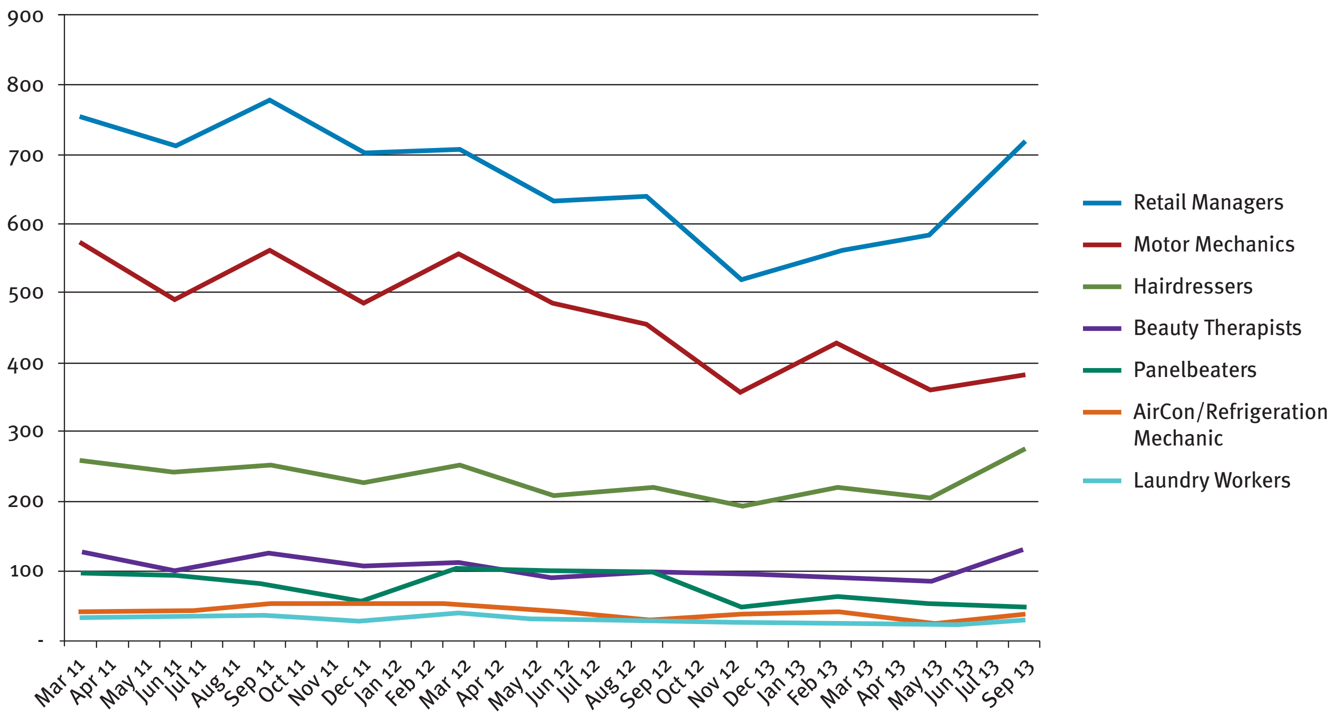
Note: High skill—managers and professionals. Medium skill—technicians and trades workers, community and personal service workers. Low skill—clerical and administrative workers, sales workers, machinery operators, drivers and labourers.

Job vacancies

Figure 3.3 below highlights the number of vacancies posted online in Victoria over the last two years for selected key Other Services occupations. The number of online job advertisements across Other Services occupations has fluctuated over the period, generally showing a downward trend. This tracks the trend seen in the national Internet Vacancy Index.[2]

There were approximately 1,800 newly lodged vacancies in key Other Services occupational groupings in September 2013. The largest occupational groupings for vacancies were Retail Managers, Motor Mechanics and Hairdressers. These occupations had close to 1,400 vacancies in September 2013.

Figure 3.3: Number of newly lodged online vacancies in Other Services occupations in Victoria, 2011-13



Source: Department of Education, Employment and Workplace Relations (DEEWR) Internet Vacancy Index (based on a count of online vacancies newly lodged on SEEK, My Career, CareerOne and Australian JobSearch), major advertising occupations only.

Note: caution advised when using monthly occupation data as it is susceptible to fluctuation from month to month.

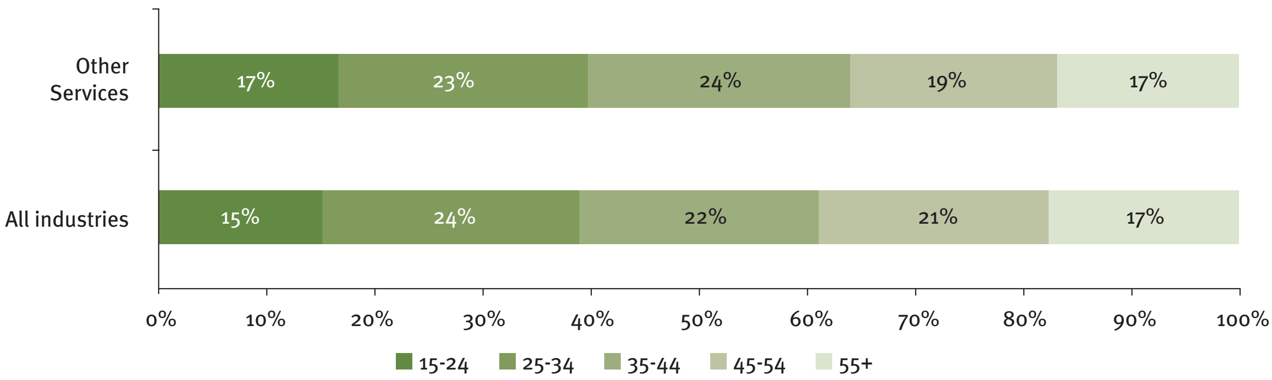
Labour market characteristics

Employment by age

The age profile of the Other Services workforce is very similar to that for all industries. The proportion of employees is slightly higher for the youngest age grouping, but otherwise the sector's age profile mirrors that of the 'all industries' average.

The age profile of the industry varies by sub-sector however, with over half of all Hairdressers and Beauty Therapists aged between 15 and 34.

Figure 3.4: Proportion of employment by age, Victoria, 2012-13



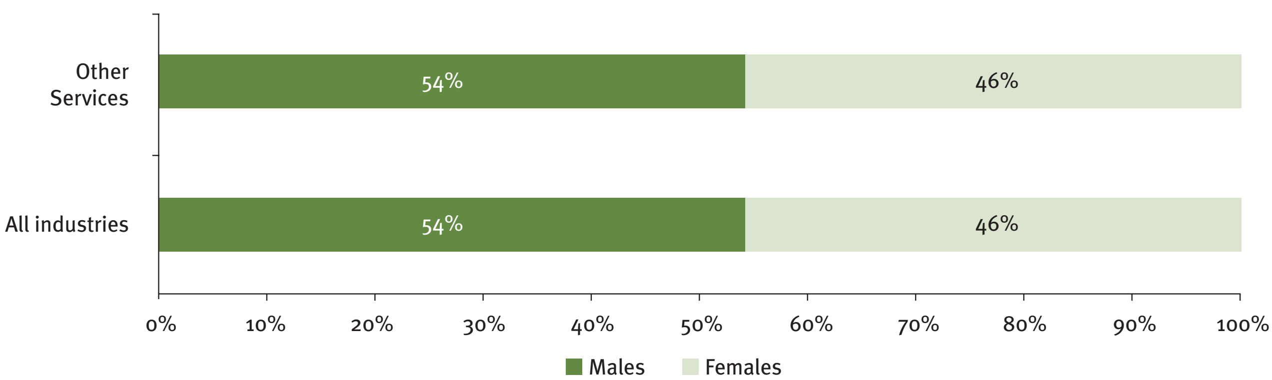
Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

Employment by gender

The Other Services industry employs the same proportion of men (54 per cent) than women (46 per cent) to that of the all industries average.

Again, this varies by sub-sector, with the majority of the Hairdressing and Beauty Services workforce being female while the majority in the Automotive Repair sub-sector are male.

Figure 3.5: Proportion of employment by gender, Victoria, 2012-13

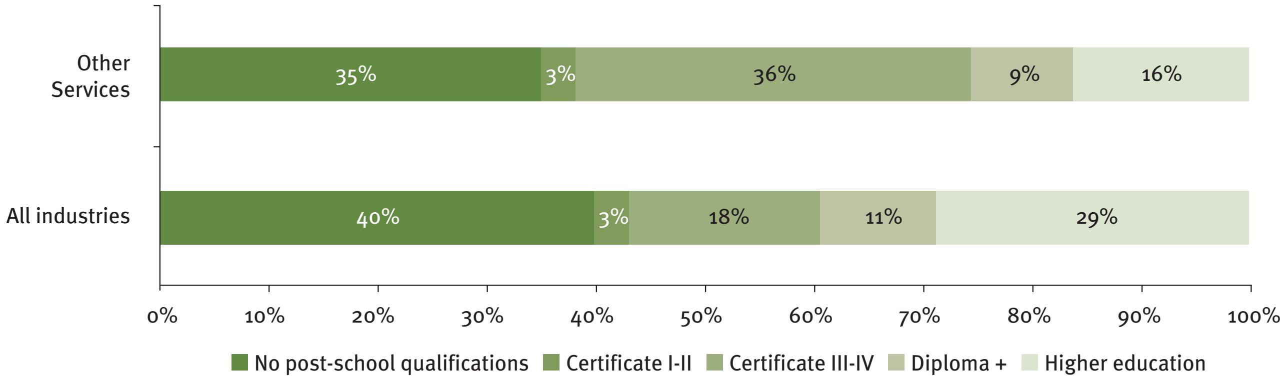


Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

Employment by qualification

A relatively small proportion of the Other Services industry workforce (16 per cent) has higher education qualifications, lower than the all-industry average of 29 per cent. The proportion of the workforce qualified to Certificate III and IV level is double the all-industry proportion at 36 per cent, highlighting the important role vocational training plays within this industry.

Figure 3.6: Proportion of employment by qualification level, Victoria, 2012-13



Source: Monash Centre of Policy Studies Employment Forecasts, June 2013

Occupations in demand

Table 3.1 highlights the occupations at four-digit ANZSCO level (Australian and New Zealand Standard Classification of Occupations) that align to the Other Services industry. Note that while some occupations also align to other industries, the figures shown are specific to the Other Services industry.

Forecasts presented in the table estimate the employment growth and replacement demand in terms of the average number of jobs required for each occupation annually up to 2017-18.

Employment growth is the net number of new jobs that the occupation is currently forecasting within the industry. Replacement demand is the number of existing workers that are forecast to leave each occupation through retirement, moving on etc. that requires replacing to meet existing employment needs.

Across all occupations in the Other Services industry (including office support occupations such as book-keepers, receptionists etc.) projected average annual employment needs between 2012-13 and 2017-18 are around 6,900 workers per year.

Table 3.1: Estimated annual employment growth + replacement demand figures for occupations in the Other Services sector across Victoria

Occupation	2012-13 employment total	Average annual employment needs	Overall employment growth to 2017-18
Hairdressers	15,800	1,320	1,650
Motor Mechanics	12,550	790	750
Panelbeaters	4,440	380	90
Beauty Therapists	4,240	320	460
Ministers of Religion	3,020	70	-320
Fitness Instructors	2,480	250	460
Laundry Workers	2,450	50	-200
Airconditioning and Refrigeration Mechanics	2,430	260	220
Retail Managers	2,240	90	170
Bookkeepers	1,900	90	120
Car Detailers	1,900	80	120
Metal Fitters and Machinists	1,830	140	200
General Clerks	1,720	80	130
Electronics Trades Workers	1,710	30	-240
Office Managers	1,680	30	-70
Vehicle Painters	1,640	210	80
Receptionists	1,600	80	100
Accounting Clerks	1,400	60	160
Animal Attendants and Trainers	1,380	110	110
Other Miscellaneous Labourers	1,330	70	150

VET occupations highlighted in green

Key messages at the occupational level are that there is currently forecast to be substantial employment growth and replacement demand to 2017-18 in:

- Hairdressers: average annual employment needs of +1,320, and an estimated overall employment growth of around 1,650 between 2012-13 and 2017-18, the largest in the industry.
- Motor Mechanics: average annual employment need of +790, an and estimated overall employment growth of around 750 workers between 2012-13 and 2017-18.
- Panelbeaters: +380 on average annually, and an estimated overall employment growth of around 90 workers.
- Beauty Therapists: +320 on average annually, and an estimated overall employment growth of around 460 workers between 2012-13 and 2017-18.
- Fitness Instructors: +250 on average annually, and an estimated overall employment growth of around 460 workers between 2012-13 and 2017-18.
- Airconditioning and Refrigeration Mechanics: +260 on average annually, and an estimated employment growth of around 220 workers between 2012-13 and 2017-18.

There are also a number of occupations where overall employment growth is expected to decline:

- Laundry Workers: this occupation has a projected decline in employment of 200 workers between 2012-13 and 2017-18. Projected average annual employment needs over this period are 50 workers to replace those leaving the industry.
- Electronics Trades Workers: this occupation has a projected decline in employment of 240 workers between 2012-13 and 2017-18, with a projected average annual employment needs of 30 workers to replace those leaving the industry.

Specialised and in-shortage occupations

This section focuses on current skills shortages in specific occupations related to the Other Services industry as well as those occupations that are specialised . The Department's analysis of skill shortages considers both quantitative evidence and intelligence gathered through industry consultation.

Highlighted below are the occupations within the Other Services industry that are deemed to be specialised and/or in shortage. Table 3.2 then provides a summary of relevant occupations by specialised and in-shortage status.

Motor Mechanic (includes Motor Mechanic (General), Diesel Mechanic, and Motorcycle Mechanic) is a large occupation with a declining growth rate. Currently considered in skills deficit, industry intelligence is consistent in flagging an ongoing shortage in this occupation. Ongoing issues have been flagged in attracting mechanical apprentices, along with apprenticeship retention. Some of these recruitment difficulties are associated with an employer perception that applicants are not work-ready. This occupation is also a specialised occupation.

Motor Mechanics	Skills Shortage	✔	Specialised Occupation	✔

Panel Beater has been identified as being a shortage occupation in Victoria and is also a specialised occupation. While employment is declining in this occupation, replacement demand and vacancies are on the increase and graduate absorption is above average. Industry intelligence is consistent in flagging this as a shortage occupation, with research indicating that insurance company repair rates, low wages, business closures, a lack of suitable entrants into the industry and attraction of labour to other industries have all contributed towards this shortage.[4]

[4] Auto Skills Australia, Environmental Scan 2013.

Panel Beater	Skills Shortage	✔	Specialised Occupation	✔

Vehicle Painter is a specialised occupation and is considered to be in shortage in Victoria. It is an average-sized occupation with a declining growth rate, growing vacancies and above average graduate absorption. Industry intelligence is consistent in identifying this as a shortage occupation. As with Panel Beaters, insurance company repair rates are identified as having a significant impact on this occupation.

Vehicle Painters	Skills Shortage	✔	Specialised Occupation	✔

Automotive Electrician has been identified as being in shortage in Victoria and is also a specialised occupation. Declining growth rates, replacement demand and vacancies may indicate that shortages are less severe than has previously the case, lower than average training and high graduate absorption, combined with advice from industry, suggests they still exist. With growing numbers of students undertaking conversion training from Mechanic to Automotive Electrician in response to the industry's demand for electrical skills, this may relieve some of the pressure on this occupation into the future.

Automotive Electricians	Skills Shortage	✔	Specialised Occupation	✔

Other occupations identified as experiencing skills shortages in Victoria which are of relevance to the Other Services industry include Retail Managers and Airconditioning and Refrigeration Mechanics.

Table 3.2: Occupations 'in shortage' or 'specialised'

Occupation	In-shortage	Specialised
Hairdressers	No	No
Motor Mechanics	Yes	Yes
Panelbeaters	Yes	Yes
Beauty Therapists	No	No
Fitness Instructors	No	No
Laundry Workers	No	No
Airconditioning and Refrigeration Mechanics	No	Yes
Retail Managers	Yes	No
Car Detailers	No	No
Metal Fitters and Machinists	Yes	Yes
Electronics Trades Workers	No	Yes
Vehicle Painters	Yes	Yes
Animal Attendants and Trainers	No	No
Automotive Electricians	Yes	Yes

Workforce skills needs

- Technology has been identified as a major driver of on-going structural change in the Automotive Repair and Maintenance sub-sector, as the sophisticated network of computerised vehicle systems, the use of new lightweight vehicle componentry and the wider adoption of hybrid and battery electric vehicles over time will require considerable investment in human capital and skills, as well as plant and equipment.
- A number of skill shortage occupations have been identified in the Repair and Maintenance sub-sector, including Motor Mechanics and Automotive Electricians. Businesses report issues in retaining skilled employees in the industry, and while it takes up to four years to train an apprentice, in many cases a person's expertise and their mastery of a specific skill may only mature after additional years in the industry. In the meantime, workers are being lost to the Mining and Construction industries, leaving recruitment difficulties and skills shortages.
- Hairdressing is also experiencing a mismatch between the skills available and the skills demanded by the industry. Employers, on average, receive about five applications for each Hairdresser vacancy. However, most applicants are not deemed suitable due to a lack of practical experience. A change in training methods is part of the reason for this. Traditionally, a hairdresser would undertake a full apprenticeship, however, these are now being replaced by a number of short courses and condensed apprenticeships. Compounding this is the tendency for qualified hairdressers to leave the trade to pursue other careers, such as clerical administration work, which pays similarly but is often considered less demanding in terms of time and effort - Census data shows that over 50 per cent of qualified hairdressers do not work in the occupation. Retention of workers is therefore a necessity.
- There is currently considerable development in beauty products, particularly in the area of anti-ageing. The introduction of more sophisticated technologies is also occurring in the hair industry, where keratin and other nanotechnology treatments are increasingly common. The industry reports that as a result of these developments in treatments and products, there is an increasing need to engage in on-going professional development in order to remain a specialist in the field. Many of these developments require new, high-level skills and substantial levels of knowledge, as well as managing the risks in undertaking some of these procedures.
- The Hairdressing and Beauty Services sub-sector is predominantly made up of small enterprises, whereby the owner/manager has to fulfil many roles in an increasingly competitive market. There is therefore a need for salon owners and managers to develop managerial skills, especially in marketing (which includes service packaging, merchandising and promotional strategies) and financial areas (which include pricing, cash flow management and cost control), as well as keeping up with industry technical developments.
- This sub-sector is also increasingly incorporating software and ICT in their business processes, including the use of appointment management software and text messages for appointment confirmation. Salon workers are therefore required to have sufficient digital literacy skills to effectively engage with these technologies.

Sources: various IBISWorld reports, Auto Skills Australia, Environmental Scan 2013; Service Skills Australia, Environmental Scans 2013.

Other Services vocational training provision

This section focuses on training provided for the Other Services industry. It covers training activity (including a regional analysis), courses, providers and student characteristics.

Key messages, issues and challenges

- Government subsidised enrolments in Other Services courses have increased between 2008 and 2013, up by 67 per cent to around 21,000.
- A high proportion of Other Services enrolments are at the Certificate III-IV level (81 per cent). Motor Mechanics and Hairdressers are the largest occupational groupings in terms of training delivery, with approximately 6,800 and 5,100 enrolments respectively in 2013.
- The majority of training is with TAFE Institutes, who accounted for around 51 per cent of industry enrolments in 2013.
- In 2013, the largest region in terms of Other Services training delivery was Western Metropolitan Melbourne, which includes the Melbourne CBD. This region accounted for one third of industry enrolments in 2013.
- Twenty-one per cent of students in 2013 were from a Culturally and Linguistically Diverse (CALD) background – slightly below the 'all industry' average of 26 per cent. One cent of students were from an Indigenous background, while 7 per cent of students reported a disability – both broadly in line with overall industry averages.
- The age profile of Other Services students is relatively young, with 37 per cent of students in this industry aged 25 or older compared with an all-industry average of 56 per cent.
- Students in 2013 quoted that the main reasons for them undertaking vocational training in Other Services related courses was because it was a 'job requirement (26 per cent) and to 'get work' (20 per cent). 'Interest' and 'Job Skills', both at 12 per cent, were also important.
- The outsourcing of personal services by households is expected to continue to grow into the future, which will provide a steady demand for employment in the Other Services sector. Given the propensity for small enterprises and sole trading in this sector, business management and business development skills are critical to success, and training providers may wish to capitalise on this need.
- As outlined in the previous section, opportunities for training providers also lie with increasing the proportion of students undertaking full apprenticeships, especially in Automotive and Hairdressing occupations to address identified skills shortage in these areas.

Training activity

Table 4.1 below gives a summary of training activity for the Other Services industry over the period 2008 to 2013.

Enrolments

Government subsidised enrolments in Other Services courses have increased between 2008 and 2013, up by 67 per cent to around 21,100. Government subsidised enrolments remained stable between 2012 and 2013.

Other Services was the sixth largest ANZSIC industry in terms of government subsidised training delivery in 2013. Courses aligned to the Personal and Other Services sub-sector accounted for the highest proportion of training delivery, 55 per cent of enrolments in 2013.

Apprentices and trainees

There were approximately 6,800 apprentice and trainee enrolments in courses relating to Other Services in 2013, 32 per cent of all enrolments in this industry. Ninety-five per cent of these enrolments were apprentices, with a majority aligned to either the Hairdresser or Motor Mechanic occupations.

Compared to the average across all industries, apprenticeships represent a relatively high proportion of enrolments in Other Services – 31 per cent of enrolments compared with an average across all industry training delivery of 10 per cent.

Specialised and in shortage occupations

Approximately 35 per cent of Other Services industry enrolments are linked to specialised occupations or those experiencing skill shortages in Victoria. Of these, 91 per cent are in qualifications aligned to the occupation Motor Mechanic (around 6,800 enrolments).

Qualification level

A large proportion of Other Services enrolments are at the Certificate III and IV level (81 per cent in 2013). This is higher than the all-industry average of 75 per cent and reflects the strong apprenticeship linkages in this industry.

Completed qualifications

In 2013, Other Services sector completions were 7,600 in total, increasing by 78 per cent between 2008 and 2013.

Table 4.1: Key training activity in the Other Services industry, 2008-13

Government subsidised enrolments

Industry sub-sector	2008	2009	2010	2011	2012	2013
Personal and Other Services	5,400	6,400	10,300	12,400	13,000	11,600
Repair and Maintenance	7,300	6,800	7,400	7,100	8,100	9,500
Total	12,600	13,200	17,700	19,500	21,100	21,100

Apprentice or trainee

	2008	2009	2010	2011	2012	2013
Apprentice	7,200	6,700	7,000	6,800	6,800	6,500
Trainee	700	700	600	600	500	300
Total	7,800	7,400	7,500	7,300	7,300	6,800

Specialised or in-shortage

Industry sub-sector	2008	2009	2010	2011	2012	2013
Repair and Maintenance	5,000	4,400	4,500	4,700	5,900	7,400
Total	5,000	4,400	4,500	4,700	5,900	7,400

Qualification levels – 2013

	Enrolments	% total
Certificate I-II	2,500	12%
Certificate III-IV	17,200	81%
Diploma +	1,500	7%
Total	21,100	100%

Completed qualifications

Industry sub-sector	2008	2009	2010	2011	2012	2013
Personal and Other Services	1,800	2,000	3,050	4,050	4,950	3,500
Repair and Maintenance	2,500	2,300	2,700	3,200	3,900	4,100
Total	4,300	4,300	5,700	7,300	8,900	7,600

Courses

The top ten courses in Other Services accounted for 84 per cent of government subsidised enrolments in 2013. The Certificate III in Automotive Mechanical Technology attracted the most enrolments, one quarter of the total.

Table 4.2: Other Services qualifications ranked by 2013 enrolments, government subsidised, 2008-13

Course Name	2008	2009	2010	2011	2012	2013
Certificate III in Automotive Mechanical Technology	2,600	2,900	3,400	3,500	4,400	5,400
Certificate III in Hairdressing	2,700	2,800	4,200	5,300	5,500	4,800
Certificate IV in Beauty Therapy	250	400	550	600	1,300	1,800
Certificate IV in Beauty Services	350	500	850	1,100	1,300	1,700
Diploma of Beauty Therapy	450	1,000	2,200	2,700	2,200	1,400
Certificate IV in Automotive Technology	300	250	200	250	500	700
Certificate II in Automotive Studies (Pre-vocational)	-	-	700	800	650	600
Certificate III in Automotive Vehicle Body	250	350	400	400	450	550
Certificate II in Hairdressing	800	950	1,100	950	900	500
Certificate III in Automotive Electrical Technology	150	200	250	250	300	350

Note: course totals include equivalent superseded courses.

Enrolments by occupation

Motor Mechanics (General), Hairdresser and Beauty Therapists were the top three occupations in Other Services and take in 79 per cent of industry enrolments. Mechanic's Assistant also had over 1,000 enrolments in 2013.

Table 4.3: Other Services occupations ranked by 2013 enrolments, government subsidised, 2008-13

Occupation	2008	2009	2010	2011	2012	2013
Motor Mechanic (General)	4,300	3,900	4,000	4,200	5,400	6,800
Hairdresser	2,800	2,900	4,400	5,600	5,900	5,100
Beauty Therapist	1,100	1,900	3,500	4,400	4,700	4,900
Mechanic's Assistant	1,600	1,700	2,300	1,800	1,500	1,400
Hair or Beauty Salon Assistant	950	1,200	1,700	1,600	1,200	800
Animal Attendants and Trainers (nec)	250	300	450	400	550	550
Vehicle Body Builder	300	350	400	450	500	550
Automotive Electrician	200	200	250	250	300	350
Electronic Equipment Trades Worker	50	20	50	60	80	150
Small Engine Mechanic	80	100	100	100	100	100

nec = not elsewhere classified

Please see Appendix A for occupations and associated qualifications with funding bands (available for 2012 and 2013).

Training providers

A total of 94 training providers delivered government subsidised training aligned to the Other Services industry in 2013, however, only 45 providers delivered 100 or more enrolments.

The majority of training is with TAFE Institutes, who accounted for 51 per cent of industry enrolments in 2013. Training delivery by private providers has increased to 46 per cent in 2013, up from 17 per cent in 2008, while Learn Local provision in this industry remains low (2 per cent of total enrolments in 2013).

Table 4.4: Proportion of enrolments by provider type, government subsidised, 2008-2013

Provider Type	2008	2009	2010	2011	2012	2013
Private	17%	18%	28%	39%	43%	46%
TAFE	81%	78%	68%	57%	53%	51%
Learn Local	2%	4%	4%	4%	3%	2%

Funding patterns

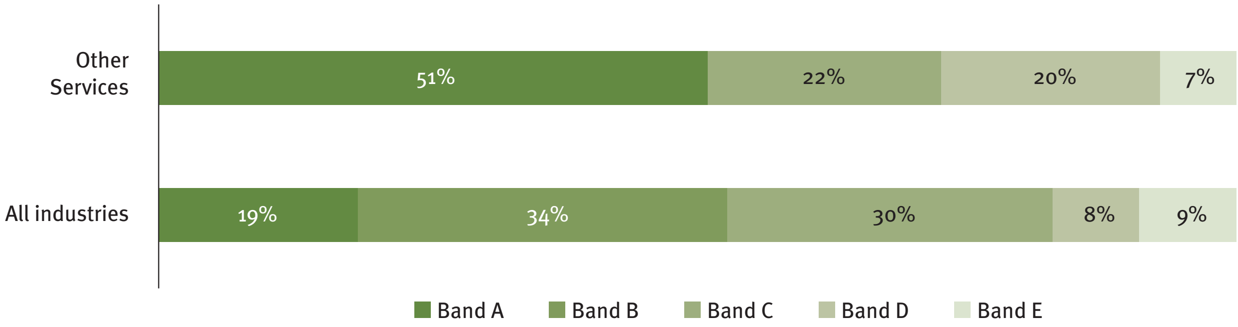
From July 2012 funding bands for government subsidised training were introduced. The allocation of funding within these bands is designed to better target areas of greatest public benefit and future jobs growth. Where there is not a strong need for Government support the training subsidies are lower.

Enrolments by funding band

Fifty-one per cent of enrolments in Other Services industry courses in 2013 were in Subsidy Band A with another 22 per cent in Band B. The remaining 27 per cent of enrolments are in Bands C and D.

See Appendix A for a list of courses with associated subsidy bands for 2012 and 2013.

Figure 4.1: Enrolments by subsidy band, government subsidised, 2013



Regional training activity

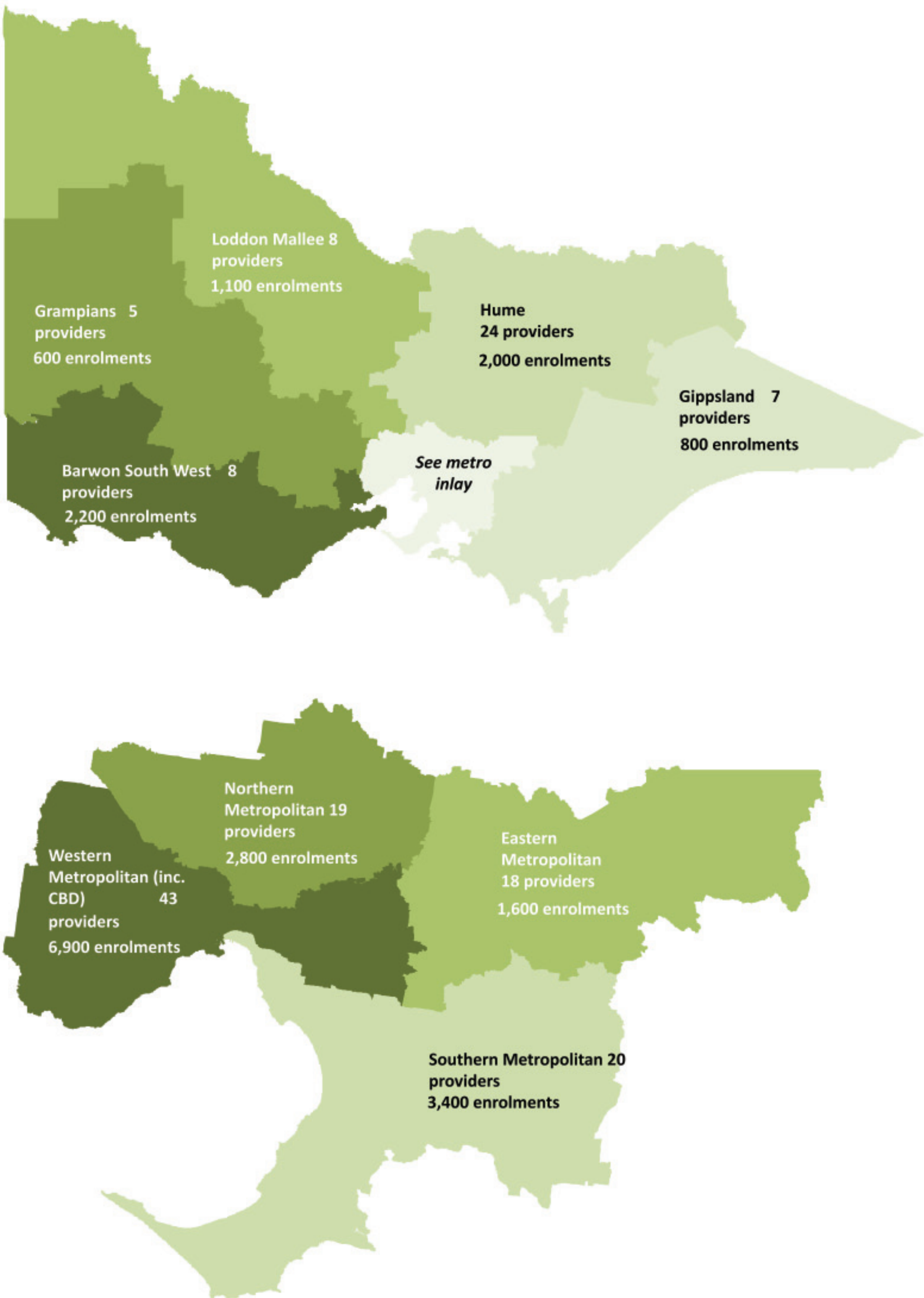
In 2013, the largest region in terms of Other Services training delivery was Western Melbourne (which includes Melbourne CBD), accounting for 33 per cent of industry enrolments. Southern Metropolitan was the next largest region with 16 per cent. Barwon South West was the largest regional area in terms of Other Services training, accounting for 10 per cent of industry enrolments in 2013.

Table 4.5: Victorian regions ranked by 2013 enrolments, government subsidised, 2008-13

Region	2008	2009	2010	2011	2012	2013
Western Metropolitan (inc. CBD)	2,800	2,900	4,700	5,700	7,200	6,900
Southern Metropolitan	1,900	2,000	2,300	2,800	3,300	3,400
Northern Metropolitan	3,000	2,900	3,500	3,500	3,600	2,800
Barwon South West	800	1,100	1,400	1,600	1,800	2,200
Hume	500	500	700	750	1,300	2,000
Eastern Metropolitan	1,700	1,700	2,500	2,100	1,900	1,600
Loddon Mallee	750	850	1,100	1,300	1,200	1,100
Gippsland	800	700	900	950	900	800
Grampians	300	400	450	650	650	600

Note: regional enrolment figures sum to slightly more than the overall Victoria-wide figures due to a small number of students undertaking training in campuses in more than one region.

Figure 4.2: Other Services training providers and enrolments, 2013



Student characteristics

Students from diverse backgrounds engage in vocational training in Other Services fields. Students from a Culturally and Linguistically Diverse (CALD) background represent 21 per cent of the student base in this industry, while unemployed students account for 22 per cent of the total. Seven per cent of students flagged that they had a disability, while 1 per cent were from an Indigenous background.

The age profile of Other Services students is relatively young when compared with the average student age profile across all industry training. Thirty-seven per cent of students in this industry are aged 25 or older compared with an all-industry average of 56 per cent.

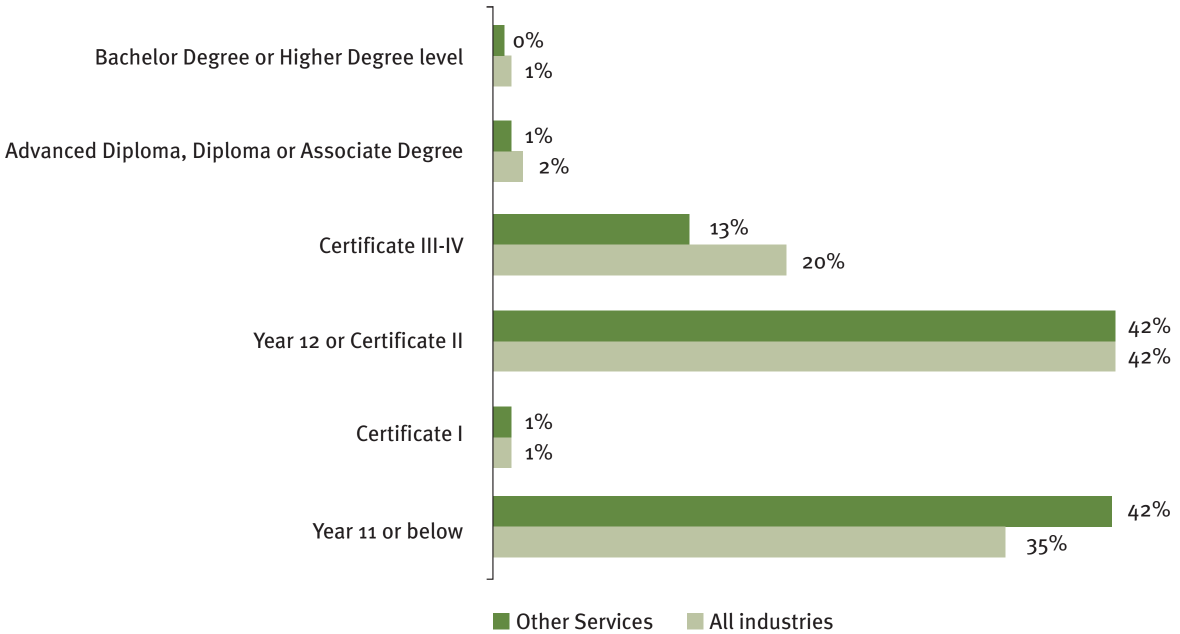
Table 4.6: Learners Facing Barriers (student numbers), government subsidised, 2008-13

Learner Groups	2008	2009	2010	2011	2012	2013
Indigenous	150	150	250	200	250	250
Disability	700	900	1,200	1,500	1,600	1,500
CALD	1,400	1,700	2,600	3,400	4,100	4,500
Unemployed	1,300	1,900	3,400	4,700	4,900	4,600
Age 25 +	2,500	2,600	3,900	5,300	7,100	7,900

At the time of enrolment, students enrolling in Other Services were more likely to have completed Year 12 or Certificate II but less likely to have completed Certificate III or higher when compared with the average across 'all-industry' training.

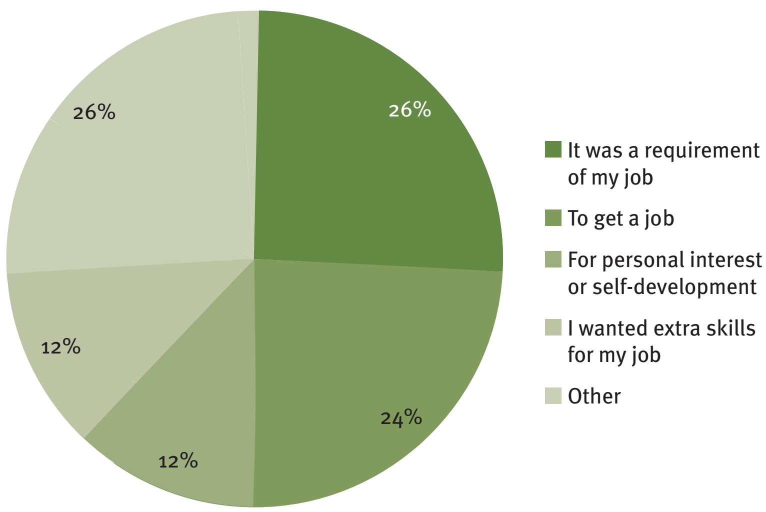
Within the sector, 13 per cent of enrolments were by students with a highest prior qualification of Certificate III or above, compared with 20 per cent across all vocational training students (see Figure 4.4).

Figure 4.3: Enrolments by highest prior qualification, government subsidised, 2013



The main reasons students were enrolling in vocational training related to Other Services were 'A Job Requirement' (26 per cent) and 'To Get Work' (24 per cent). 'Interest' and 'Job Skills', both at 12 per cent, were also important.

Figure 4.4: Enrolments by reason for study, government subsidised, 2013



Appendix A

Table 5.1: Enrolments by occupation, course and subsidy band, 2012-2013

Occupation	Course name	Funding band	2012	2013
Animal Attendants and Trainers (nec)	Certificate I in Animal Studies	Band B	10	20
	Certificate II in Animal Studies	Band B	250	150
	Certificate III in Animal Studies	Band B	60	100
	Certificate III in Animal Technology	Band B	<10	10
	Certificate III in Captive Animals	Band B	20	10
	Certificate III in Companion Animal Services	Band B	150	100
	Certificate IV in Companion Animal Services	Band B	100	150
	Total		**550**	**550**
Automotive Electrician	Certificate III in Automotive Electrical Technology	Band A	300	350
	Total		**300**	**350**
Beauty Therapist	Certificate III in Beauty Services	Band C	1,300	1,700
	Certificate III in Nail Technology	Band C	<10	-
	Certificate IV in Beauty Therapy	Band C	1,300	1,800
	Diploma of Beauty Therapy	Band D	2,200	1,400
	Total		**4,700**	**4,900**
Bicycle Mechanic	Certificate II in Bicycle Mechanical Technology	Band C	-	<10
	Certificate II in Bicycles	Band C	40	20
	Certificate III in Bicycle Workshop Operations	Band C	-	<10
	Certificate III in Bicycles	Band C	10	<10
	Total		**50**	**30**
Business Machine Mechanic	Certificate II in Business Equipment Servicing	Band B	<10	-
	Certificate III in Business Equipment	Band B	<10	<10
	Total		**<10**	**<10**
Civil Celebrant	Certificate IV in Celebrancy	Band C	80	40
	Total		**80**	**40**
Drycleaner	Certificate III in Dry Cleaning Operations	Band B	40	20
	Total		**40**	**20**

Occupation	Course name	Funding band	2012	2013
Electrical or Telecommunications Trades Assistant	Certificate II in Computer Assembly and Repair	Band B	40	30
	Certificate II in Technical Support	Band C	-	‹10
	Total		**40**	**30**
Electrician (General)	Certificate III in Appliance Service	Band A	-	‹10
	Certificate III in Appliance Servicing	Band A	20	10
	Certificate III in Electrical Machine Repair	Band B	40	30
	Total		**60**	**50**
Electronic Equipment Trades Worker	Certificate III in Electronics and Communications	Band A	60	70
	Certificate IV in Electronics and Communications	Band A	20	70
	Total		**80**	**150**
Electronic Instrument Trades Worker (General)	Certificate III in Electrotechnology Assembly and Servicing	Band A	‹10	-
	Total		**‹10**	**-**
Funeral Workers nec	Certificate III in Gravedigging, Grounds and Maintenance	Band C	‹10	10
	Total		**‹10**	**10**
General Clerk	Certificate III in Automotive Administration	Band C	30	20
	Total		**30**	**20**
Hair or Beauty Salon Assistant	Certificate II in Hairdressing	Band B	900	500
	Certificate II in Make-up Services	Band C	40	-
	Certificate II in Nail Technology	Band C	300	300
	Vocational Graduate Certificate in Intense Pulsed Light and Laser Hair Reduction	Band D	20	10
	Total		**1,200**	**800**
Hair or Beauty Salon Manager	Diploma of Hairdressing Salon Management	Band D	200	‹10
	Diploma of Salon Management	Band D	40	40
	Total		**250**	**40**

Occupation	Course name	Funding band	2012	2013
Hairdresser	Certificate III in Hairdressing	Band B	5,500	4,800
	Certificate IV in Hairdressing	Band C	450	250
	Total		**5,900**	**5,100**
Laundry Worker (General)	Certificate III in Laundry Operations	Band B	20	40
	Certificate IV in Laundry Operations and Supervision	Band B	-	10
	Total		**20**	**50**
Mechanic's Assistant	Certificate I in Automotive	Band B	300	100
	Certificate II in Automotive Body Repair Technology	Band B	-	70
	Certificate II in Automotive Mechanical	Band B	250	300
	Certificate II in Automotive Servicing Technology	Band B	-	<10
	Certificate II in Automotive Studies (Pre-vocational)	Band A	650	600
	Certificate II in Automotive Tyre Servicing Technology	Band B	-	20
	Certificate II in Automotive Vehicle Servicing	Band B	300	300
	Certificate II in Marine	Band C	<10	-
	Certificate II in Motorsport	Band B	<10	<10
	Total		**1,500**	**1,400**
Model	Certificate II in Modelling	Band C	10	-
	Total		**10**	**-**
Motor Mechanic (General)	Certificate III in Automotive (Mechanical - Light Vehicle)	Band A	<10	-
	Certificate III in Automotive Diesel Engine Technology	Band A	-	<10
	Certificate III in Automotive Engine Reconditioning	Band A	-	<10
	Certificate III in Automotive Mechanical Technology	Band A	4,400	5,400
	Certificate III in Automotive Specialist	Band A	250	300

Occupation	Course name	Funding band	2012	2013
	Certificate III in Heavy Commercial Vehicle Mechanical Technology	Band A	-	10
	Certificate III in Light Vehicle Mechanical Technology	Band A	-	30
	Certificate III in Marine	Band A	80	70
	Certificate III in Marine Mechanical Technology	Band A	-	<10
	Certificate III in Mobile Plant Technology	Band A	-	<10
	Certificate III in Motorcycle Mechanical Technology	Band A	-	<10
	Certificate III in Motorsport	Band A	70	70
	Certificate III in Motorsport Technology	Band A	-	<10
	Certificate III in Recreational Vehicle Service and Repair	Band B	-	<10
	Certificate III in Recreational Vehicle Servicing	Band B	20	-
	Certificate IV in Automotive Management	Band B	<10	<10
	Certificate IV in Automotive Mechanical Diagnosis	Band A	-	100
	Certificate IV in Automotive Performance Enhancement	Band A	<10	30
	Certificate IV in Automotive Technology	Band A	500	700
	Certificate IV in Motorsport	Band A	20	20
	Certificate IV in Motorsport Technology	Band A	-	<10
	Diploma of Automotive Management	Band C	30	<10
	Diploma of Automotive Technology	Band C	20	<10
	Diploma of Motorsport	Band C	<10	-
	Total		**5,400**	**6,800**

Occupation	Course name	Funding band	2012	2013
Motor Vehicle Parts and Accessories Fitter (General)	Certificate II in Automotive Electrical Technology	Band B	30	<10
	Certificate III in Automotive Retail, Service and Repair	Band B	60	40
	Total		**90**	**50**
Panelbeater	Certificate III in Automotive Body Repair Technology	Band A	-	10
	Total		**-**	**10**
Religious Assistant	Certificate III in Christian Ministry and Theology	Band C	90	10
	Certificate IV in Christian Ministry and Theology	Band C	30	80
	Total		**100**	**90**
Shoemaker	Certificate III in Footwear Repair	Band B	-	<10
	Total		**-**	**<10**
Small Engine Mechanic	Certificate II in Outdoor Power Equipment	Band B	<10	<10
	Certificate III in Outdoor Power Equipment	Band A	100	90
	Certificate III in Outdoor Power Equipment Technology	Band A	-	<10
	Total		**100**	**100**
Storeperson	Certificate II in Automotive Warehousing/ Distribution Operations	Band B	<10	-
	Total		**<10**	**-**
Vehicle Body Builder	Certificate II in Automotive Vehicle Body	Band B	20	20
	Certificate III in Automotive Vehicle Body	Band A	450	550
	Total		**500**	**550**
Vehicle Painter	Certificate III in Automotive Refinishing Technology	Band A	-	10
	Total		**-**	**10**
Vehicle Trimmer	Certificate III in Automotive and Marine Trimming Technology	Band A	-	<10
	Total		**-**	**<10**