

# INDUSTRY PROFILE - Retail



**Retail Trade**

*ANZSIC: Division G*

**Report Prepared July 2022**

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## Overview

The Logistics & Defence Skills Council (LDSC) provides strategic workforce development advice directly to the Office of the State Training Board (OSTB), and the Department of Training and Workforce Development (DTWD) on issues and opportunities affecting sectors within our industry remit, these include:

- |                     |  |
|---------------------|--|
| Aviation            | Postal                                 |
| Community Pharmacy  | Rail Transport                         |
| Defence             | Retail                                 |
| Defence Industries  | Road Transport                         |
| Floristry           | Warehousing (Supply Chain) & Logistics |
| Freight Forwarding  | Wholesaling                            |
| Maritime            |  |
| Ports & Stevedoring |  |

As part of this advice the LDSC creates annual **Industry Profiles** for occupations within these areas, outlining areas for skills development for the current and future workforce, areas of skills shortages as well as emerging technology or innovation which may impact these industries workforces. *Please visit our website [www.ldsc.asn.au](http://www.ldsc.asn.au) for further information on this and on our other industry sectors.*

## 1: Industry Regulatory / Licencing Bodies

- Licences and permits required may vary depending on what is being sold, the location of the sale, processes involved in producing goods for sale as well as Federal, State and Local government rules<sup>1</sup>. The Commonwealth, states and territories retain responsibility for regulating and enforcing WHS laws in their jurisdictions.
- Retailers must comply with Australian Consumer Law (ACL) regulations regarding their business practices. Under the Australian Consumer Law (ACL), products you buy from an Australian seller are covered by 'consumer guarantees'.<sup>2</sup> These guarantees cover a broad range of consumer rights. For example, that goods and services be:
  - Of acceptable quality and free of fault.
  - Match the description
  - Match the quality of any sample or demonstration model
  - Fit for the purpose specified

The above consumer rights also apply to online Retail.<sup>3</sup>

- Other areas of legislation that affect the industry relate to trading hours and employment conditions. Whilst Industry operations are governed by the Competition and Consumer Act 2010 (previously the Trade Practices Act 1974). Respective state and territory governments regulate retail trading hours and certain licences and regulations regarding local trading practices.
- The retail and wholesale trade industry have key legislation bodies, mandatory industry codes and standards and Australian Competition and Consumer Commission (ACCC) guides.
  - The ACCC is an independent Commonwealth statutory authority, that enforces the Competition and Consumer Act 2010 and a range of additional legislation, promoting competition, fair trading and regulating national infrastructure for the benefit of the retail sector<sup>4</sup>.
  - Safe Work Australia (SWA) is an Australian government statutory body established in 2008 to develop national policy relating to WHS and workers' compensation<sup>5</sup>.

## 2: Industry Development and Workforce Opportunities and/or Challenges for Industry

### *2.1: Industry opportunities affecting the current and future supply and demand of industry's skills and workforce*

- Omnichannel shopping is the ability to deliver products and services directly to the consumer through multiple channels in a way that is more responsive to customer needs. Technology now allows customers multiple ways to make purchases and hold conversations with businesses. The outcome of this trend is that roles now require a higher level of computer literacy and a capacity to move between various forms of technologies, adjusting communication styles and skills to work within each channel as needed.
- The use of eCommerce-friendly applications such as Afterpay, Open pay, Zipay and other By Now Pay Later (BNPL) technologies has opened a multitude of payment options. Allowing consumers the ability to purchase products through short-term financing. The value of transactions processed by some of the large BNPL providers grew by over 50 per cent in the second half of 2020 compared to the same period a year earlier.<sup>6</sup> A recent Afterpay report estimated that 11,000 people were employed directly by merchants just to support Afterpay sales in 2020. With an additional 33,000 jobs being supported indirectly through the supply chain.<sup>7</sup>
- Retail is adapting to new technologies and making the most of tablets and phone devices to monitor sales and stock movements. Large suppliers are using such technologies to outsource their merchandising needs to 3<sup>rd</sup> party providers. Using handheld devices merchandisers can check stock levels, re-order product and monitor sales performance. Due to the flexibility of the role it opens up opportunities for those returning to work, such people who may have school children that need collecting.

- *Appendix 2 'Supermarkets and Grocery Stores'* continue to dominate sales in WA within the retail Division. Accounting for 40% of all retail sales in April 2022, reaching nearly \$1.2 Billion.<sup>1</sup> They were almost four times their closest two Subdivision rivals 'Hardware, Building and Garden Retailing', and 'Other Retailing'<sup>2</sup>. This points toward a continuing demand for workers in the Supermarkets and Hardware related retail sectors.
- *Appendix 2 'Other Store n.e.c'* retailing is not only the second-largest retail Subdivision it has also seen the largest percentage growth since 2017 of any of the retail subdivisions at 87%. This may indicate workforce demand in specialist retailing.
- The retail trade is the second largest employer in WA. Employing approximately 149,748 persons, accounting for 10% of the total WA workforce<sup>8</sup>. The largest employing (4-digit ANZSCO) occupations as of May 2022 in Retail are:

Occupation	WA Workforce	% of Retail Workforce	% Male	% Female
Sales Assistants (General)	52803	44%	32%	68%
Checkout Operators and Office Cashiers	24029	20%	23%	77%
Retail Managers	20470	17%	55%	45%
Shelf Fillers	8685	7%	56%	44%
Motor Vehicle and Vehicle Parts Salesper..	4027	4%	100%	0
Other Sales Assistants and Salesperson	2378	2%	26%	74%
Retail Supervisors	2252	2%	65%	35%

Management and supervisory roles are predominantly occupied by men. Whilst customer-facing and lower skilled roles show an even stronger tendency to be occupied by women.

- Retail occupations that have experienced the largest increases and decreases over the last five years are:<sup>9</sup>

Occupation	May-2022	May-2017	Change
6211 Sales Assistants (General)	52803	47113	12%
6311 Checkout Operators and Office Cashiers	24029	13390	79%
1421 Retail Managers	20470	29015	-29%
6213 Motor Vehicle and Vehicle Parts Salespersons	4027	4718	-15%
6219 Other Sales Assistants and Salespersons	2378	1100	116%
6215 Retail Supervisors	2252	6084	-63%
6395 Visual Merchandisers	1598	819	95%
6212 ICT Sales Assistants	1090	608	79%

These movements should be analysed against the 32% increase in retail spending that has taken place over the corresponding 5 years,<sup>10</sup> the current historically low unemployment rate of 2.9%.<sup>11</sup> and industry feedback regarding workforce shortages. It is to be noted that these figures relate to employment numbers and do not correlate to occupational demand. Of particular concern is the shortage of Retail Managers and Supervisors which is supported by industry consultation. This points to a need to recruit more people into these positions whilst simultaneously upskilling and developing existing staff members so they can fill these more senior roles.

- A review of business entry and exit data for the WA Retail sector reveals the high turnover rates for Non-Store Retailing (this ANZSIC included online retail), Clothing Retailing, and Other Store-Based Retailing (other retailing

<sup>1</sup> As 'ABS Table 8501.0 Retail Trade, Australia' includes Takeaway Food Services and Cafes and Restaurants and Catering Services these have been excluded from the final analysis.

<sup>2</sup> This class consists of units mainly engaged in retailing goods not elsewhere classified from store-based premises – see [https://www.abs.gov.au/ausstats/abs@.nsf/Product+Lookup/1292.0~2006%20\(Revision%201.0\)~Chapter~Class+4279++Other+Store-Based+Retailing+n.e.c.](https://www.abs.gov.au/ausstats/abs@.nsf/Product+Lookup/1292.0~2006%20(Revision%201.0)~Chapter~Class+4279++Other+Store-Based+Retailing+n.e.c.) for full list.

not-classified).<sup>12</sup> This high entry and exit rates may indicate a need for training and workforce development tailored to these industries.

ANZSIC Industry	Operating 2021	Entries	Exits	Operating 2022
Non-Store Retailing	1,351	461	232	1,587
Clothing Retailing	904	205	148	966
Other Store-Based Retailing n.e.c.	1,061	159	119	1,100

### 2.1.1: eCommerce:

- In April 2017 Non-Food online retail sales were \$678 Million and by April 2022 they had reached \$2.6 Billion - an increase of 285%.<sup>13</sup> Over the same period total retail sales grew from \$25.1 Billion to \$32.5 Billion – an increase of 32%. See Appendix 1
- Auspost estimates that online now accounts for just over 16% of all retail sales in Australia. However, even removing food sales from the data, non-food retail was still nearly \$26 Billion year ending June 2021.<sup>14</sup>
- These figures accelerated once COVID-19 restrictions started to get imposed. For Jan 2020, online non-food totalled \$1.3 Billion; by June 2021, this figure had jumped to \$2.2 Billion - a 65% increase in under 18 months.
- Data from Auspost also shows that WAs online purchases in 2021 were 44.4% higher than in 2020.

### 2.1.2: Major projects that are currently underway or under consideration which increase workforce demand and create pathways for retail occupations:

- Durlacher Streets Supermarket Shops, shopping centres & arcades, supermarkets with an Estimated Project Value of \$ 6,500,000 <sup>15</sup>
- Joondalup Southern Business District - Business Park Showrooms, Retail warehouses, Retail markets, with an Estimated Project Value of \$ 20,000,000 <sup>16</sup>
- Perth's Piccadilly Arcade redevelopment at the cost of \$13,000,000 with 25 shops ranging in size 15sqm to 80sqm and in price from \$2000 to \$3000 per square metre <sup>17</sup>
- Walyalup Koort redevelopment \$270,000,000 Fremantle to include Innovative and high-quality specialty retail and dining precincts and office accommodation for more than 1,500 state government employees relocating to Fremantle <sup>18</sup>
- Kardinya Park - \$100,000,000 <sup>19</sup> creating an estimated 370 retail jobs. <sup>20</sup>
- Westfield Booragoon expansion \$500,000,000 redevelopment will look to create 5,000 retail and construction jobs <sup>21</sup>

These projects will require a range of occupations across the retail sector but may be hindered as industry reports a shortage of managers and assistant managers across the retail sector.<sup>22 23</sup>

### 2.3: Existing and anticipated supply and demand for skills

- Regional and remote areas are experiencing difficulty in attracting and retaining suitable employees for both lower and higher-level positions. The shortages are such that large retailers have reported having to fly experienced store supervisors from their Metropolitan stores to their regional branches to provide training and support so existing staff can step up into more senior roles. This highlights the demand for management and mentoring skills.
- Over the 2021 Christmas period, Woolworths reported that their fastest-growing role was “Personal Shopper” and “one that didn't exist in 2009”,<sup>24</sup> They had around 25,000 personal shoppers picking orders for customers. Customers place their orders using the internet, via phone, or by email. There is little interaction between the person collecting the order and the customer, as would usually be the case in a traditional retail customer service role. The main role of the staff member is to collect, check and prepare the order for pick-up or dispatch to the customer.
- Even though COVID-19 mandates are easing regional areas are still reporting high absence levels due to isolation requirements. Many are still having to close their stores and are only opening during their busiest periods of the

day or when workers are available or willing to work. The shortage of experienced managers and supervisors means that newer Retail supervisors are not always given enough training in managing staff as, due to necessity, many of these positions are filled internally.

- 44% of retail businesses in WA are non-employing and 52% employ less than 19 staff. This leads to fewer opportunities for career progression which in turn leads staff to leave as they seek better employment options. This creates a constant demand for skills and there is the constant cost in time and resources, of training new staff. To remedy this situation requires, firstly, a well-trained workforce, and secondly, business owners developing the skills to manage, develop and retain teams that are critical to running a successful and resilient business.
- The development and integration of various ICT technologies into everyday working practices will require employees with digital literacy and social media skills. The hybrid retail model of the future, combining bricks and mortar with online sales capacity all within an omnichannel supply chain, will increase the demand for workers with strong customer service and problem-solving skills – who are able to work comfortably either face-to-face or using other digital communication tools.
- The Skills Priority List (SPL) for June 2021, illustrates a strong to moderate demand rating for occupations displayed in the table below. Many of these are in leadership roles and require individuals to have skills and formal training. Over the last 3 years, there has been an increase in completions for Certificate IV in Retail Management (SIR40316) which may benefit future demand<sup>25</sup>.

ANZSCO	Retail	Strong	Moderate	Soft
225411	Sales Representative (Industrial Products)	X		
142111	Retail Manager (General)		X	
611311	Sales Representative (Building and Plumbing Supplies)		X	
611312	Sales Representative (Business Services)		X	
611313	Sales Representative (Motor Vehicle Parts and Accessories)		X	
611314	Sales Representative (Personal and Household Goods)		X	
621511	Retail Supervisor		X	
639211	Retail Buyer		X	
639511	Visual Merchandiser		X	
639911	Other Sales Support Worker		X	

- All economic indicators as of January 2022 point to a tightening pool of workers.<sup>26</sup>
  - The unemployment rate is below its COVID-19 peak of 7.5% and is currently at 4.2% - even below its pre COVID-19 level.
  - Job advertisements as of Jan 2022 stood at nearly 240,000 – above their pre-COVID19 level.
  - Job Vacancies in Australia increased to 423,500 from a low of 129,000 in July 2020. Again, ell above pre-COVID-19 levels.

#### 2.4: The impact of COVID-19 to the workforce

- The State Government’s *WA Recovery Plan* provides a skilling solution to help WA recover, creating thousands of local and regional jobs. The \$27.1 billion investment in infrastructure has been committed over the next four years: including major building and construction and community development projects throughout metropolitan and regional WA<sup>27</sup>.
- As with many other industry sectors Retail is currently suffering acute workforce shortages. Rural and regional areas report this shortage is still impacting local retailers causing many to trade with limited hours. Job vacancy data from the ABS for May 2022 is 17% higher than May 2021 and 113% above pre-COVID-19 vacancy numbers.

Job vacancies ('000), industry, original						
	Feb-21	May-21	Aug-21	Nov-21	Feb-22	May-22
Retail trade	24.9	34.3	33.6	36.0	29.1	40.3

- Jobs and Skills WA is supporting these strategies and programs by working together with industry, business and employers to rebuild and develop the workforce through skilling solutions including:
  - Job-ready training programs to establish a pipeline of skilled workers
  - Accelerated apprenticeship pathway for experienced construction industry workers
  - Free and low fee training options to upskill your team
  - Initiatives to reengage Trainees who had dropped out of training due to COVID-19.
  - Financial incentives and support measures to assist in growing and developing the WA state workforce.
  - Initiating a Year 9 Career Taster Program (CTP) which aims to inspire secondary school students to become 'career curious' about further study opportunities and potential careers.<sup>28</sup>
- These skilling solutions focus not only on creating pathways to employment for jobseekers but also aim to enable WA businesses to participate and contribute to rebuilding the state.
- Businesses are continuing to suffer higher costs and delays in the delivery of products to consumers. The impact to businesses is not only reputational damage and lost sales, but increased stress levels for staff caused by frustrated customers.
- The lack of international tourists has impacted regional retailers. In September 2018, 945,000 International tourists spent a total of \$2.2Billion (Ave spend \$2,335). In September 2021, 14,000 Int Tourists spent a total of \$68Million. Even though this shortfall in numbers was made up by Intrastate visitors who spent a total of \$6.8Billion, up by \$2 Billion from 2018, their average spend was much less at \$750. <sup>29</sup> Retail businesses in regions that depend on tourism are still experiencing depressed sales as tourists tend to spend more on discretionary items such as gifts.<sup>30</sup> This has led to the cutting of staff and limiting their opening hours.<sup>31</sup>
- This spike in eCommerce sales tracks with mandates, travel restrictions, and lockdowns. Consumers have now become accustomed to the convenience of buying online. More people are shopping online (240,000 new households in April 2021) and the frequency of their purchases has also increased.<sup>32</sup> In reaction to this trend toward online shopping, the industry's ability to respond is based on the business size (rather than by the product).<sup>33</sup> The barrier for small businesses investing in training and staff is the cost of setting up and maintaining an online channel.
- Overall, the COVID-19 pandemic forced significant disruption within the retail sector. Feedback from the industry highlighted those areas directly related to the impacts of COVID-19:
  - Ability to forecast and plan long term
  - Remuneration constraints
  - Erratic spikes in demand
  - Supply chain issues
- There were a variety of staff availability issues that were, directly and indirectly, related to COVID-19. These included a reluctance to get vaccinated, self-isolation rules, and staff anxiety over enforcing mask mandates<sup>34</sup>.

## 3: Training and Education Needs

### 3.1: Current and anticipated training needs of industry

- As retail embraces eCommerce, Omnichannel supply chains, and social media, there is a growing trend toward skills in these areas. The issue in the future will be competition from sectors that also highly value computer and supply chain knowledge and experience. This may lead to a lack of qualified trainers for the retail training sector. Even now there are no RTOs delivering any Digital or Social Media Skill Sets in WA due to having no trainer with industry experience. To remedy this situation requires incentives to encourage skilled workers into the training sector.

- Private RTOs have found that students wishing to progress their career through training are foregoing SIR CERT IV in Retail Management in favour of the BSB Cert IV in Leadership and Management. The reasons given are:
  - The name of the BSB qualification allows for a broader career pathway.
  - The SIR qualification is too shop floor focused and similar to CERT III– students would like to progress into more senior strategic positions.

To resolve this would require closer consultation with students to ascertain what their needs are in relation to their desired career pathway.

- To be successful, Retail supervisors and managers would benefit immensely from hands-on experience. While formal qualifications aren't essential, a Vocational Education and Training (VET) course in retail management, leadership, or another related field, is ideal for providing real-world experience. Therefore, there needs to be a system that encourages and facilitates links between industry and training provision.

### 3.2: Training challenges/opportunities existing for industry within the training sector

- Many of the large retailers now provide in-house training. Woolworths recently committed \$50 Million to develop an integrated training system for its staff.<sup>35</sup> The effect on the sector is twofold:
  - Demand for VET delivery is driven down which is compounded due to the large retail chains employing significant numbers of the workforce.
  - If demand in the VET sector is low, then there are fewer RTOs delivering.
  - The above two factors could lead to the conclusion that retail training is not a priority for the industry. The investment made by large national retailers in training is evidence of how important they view it in relation to their own business success. Their success is an opportunity to revisit the importance of training across the whole of the retail sector.
- “Tick and Flick”, whereby trainees are taken on at a training wage and then let go once training is completed, has been raised as an issue that is damaging to the perception of training as a pathway to a career.<sup>36</sup> There is an opportunity to resolve this by re-engaging stakeholders to develop solutions and rebuild confidence by ensuring a traineeship leads to secure employment.

### 3.3: Career pathways and graduate outcomes

- The 2021 NCVER Student Outcomes Survey provides insights into employment outcomes, satisfaction with training, and further study outcomes. Of students who have completed their VET studies.

Qual	Number of respondents	Employed or in further study	Improved employment status after training	Enrolled in further study after training	Satisfied with the training	Median salary of those employed in first full-time job after training (\$)
Cert II	471	77%	56%	42%	87%	36 800
Cert III	1 689	83%	66%	34%	91%	36 400

- RTOs work closely with medium to large retailers across all sectors to put their trainees through work experience, helping students to get firsthand experience and a solid understanding of the fast paced environment. As the above NCVER student outcomes survey shows 56% of Certificate II in Retail Services graduates reported improved employment status and 66% of Certificate III in Retail graduates
- The competency-based delivery model for VET helps provide the soft skills that are crucial at all levels of retail. Through practice, skills such as teamwork, communication, and critical thinking, can be developed. Combined with supervisory and/or management experience these skills can be easily transferable from one industry to the other.
- There are no occupational licensing, certification, or specific legislative requirements to work in many occupations in retail. The level of education and training needed is often dependent on the requirements of the role. Training for shop floor and entry-level positions may take the form of “on-the-job training”, rather than be structured. Good communication and an eagerness to learn are highly valued when seeking these lower-level roles within retail. As

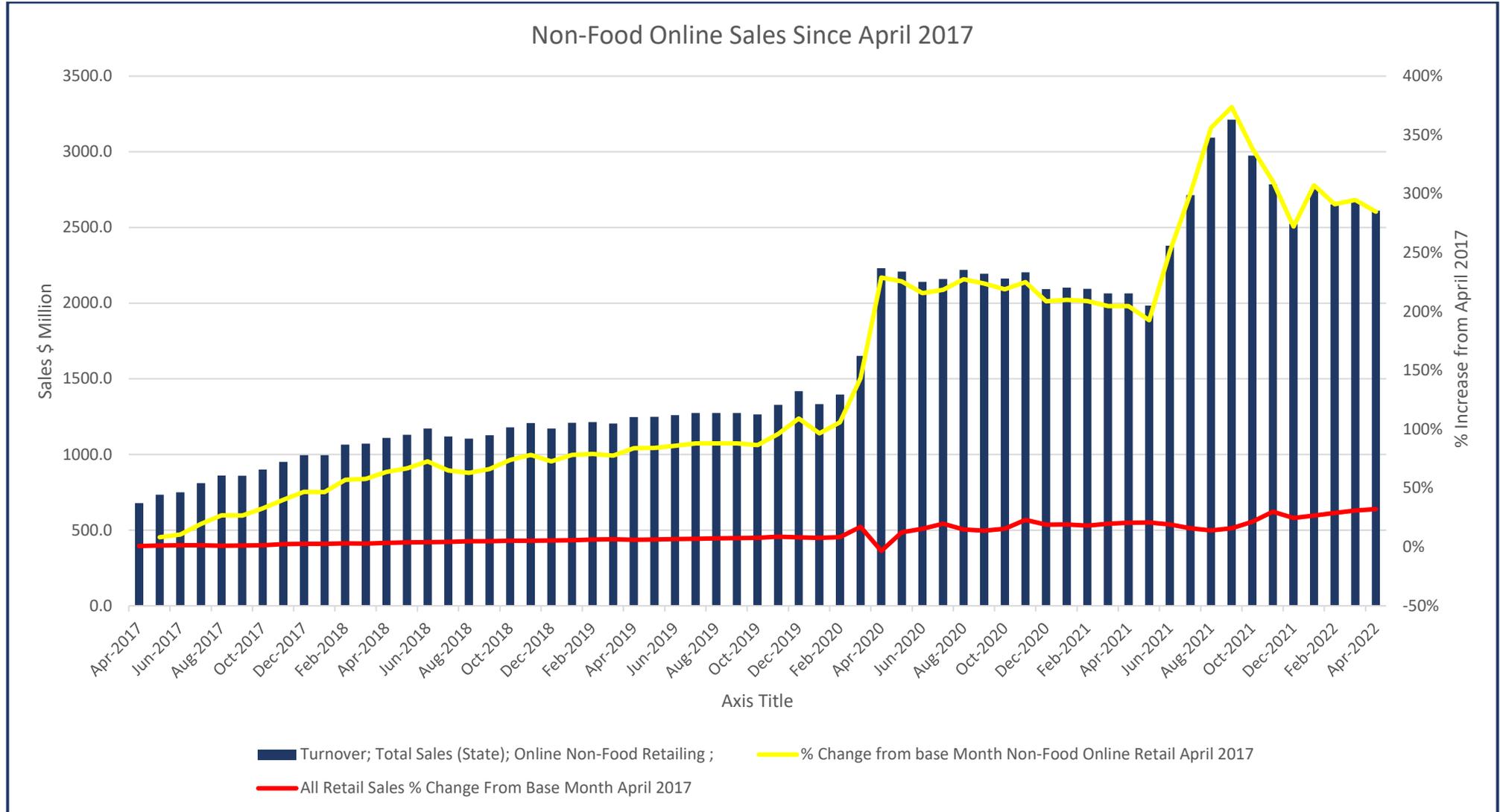
employees seek career advancement VET qualifications can provide evidence that they can meet the requirements of more senior roles. They may also provide Recognition of Prior Learning (RPL) for those seeking strategic roles where a tertiary qualification is preferred or a pre-requisite.

- At a school level, Certificate II in Retail Services is the most popular with student enrolments increasing by 105 between 2019-2020. Student enrolments for Certificate III between 2019-2020 increased by 103. Retail is a popular career pathway for school students who may struggle with science, technology, engineering, and mathematics (STEM) disciplines, or who may have encountered barriers to studying STEM due to equity issues. Industry reports that in many underrepresented communities retail training offers young school students the opportunity to build soft skills and develop their capacity to lead and manage teams.<sup>37</sup>
- Career options include but are not limited to:

- |                                 |                                 |
|---------------------------------|---------------------------------|
| Cashier                         | Inventory Manager               |
| Sales Associate                 | Stocker                         |
| Store Manager                   | Retail Warehouse Worker         |
| Buyer                           | Social Media Manager            |
| Visual Merchandiser             | Customer Service Representative |
| Advertising & Marketing Manager | Human Resources                 |
| Cleaning & Maintenance          | Loss Prevention Manager         |
| Logistics                       | Team Leaders & Floor Managers   |
| Security Guard                  |                                 |

Certificate II	Certificate III	Certificate IV	Diploma	Advanced Diploma
Checkout Team Worker	Team Leader (Supermarket)	Assistant Supermarket Manager	Store Manager	Senior Visual Merchandiser
Customer Service Assistant (Department Store)	Customer Service Assistant (General)	Service Manager (Department Store)	Cluster Supermarket Area Manager	
Gourmet Food Sales Assistant	Customer Service Assistant (Department Store)	Store Manager	Retail Area Manager	
	Retail Supervisor	Food Store Manager	Visual Merchandiser	
	Sales Counter Assistant (Wholesaler)			
	Sales Representative			

Appendix 1: 8501.0 Retail Trade, Australia TABLE 21 Online Retail Turnover, Australia, by type of Activity (Experimental Data)



Appendix 2: 8501.0 Retail Trade, Australia TABLE 11. Retail Turnover, State by Industry Subgroup, Original (Excludes Cafes and Restaurants, and Takeaway Food Services)



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<sup>31</sup> Industry Consultation.

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