INDUSTRY PROFILE - Retail

Retail

ANZSIC: DIVISION G

Report Prepared August 2023

Contents

1. Overview

1.1 Industry Background (i.e., Regulatory and Licensing 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[1]. 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'.[2] 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.[3]

- 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 sector4.
  - Safe Work Australia (SWA) is an Australian government statutory body established in 2008 to develop national policy relating to WHS and workers' compensation[5].

1.2 Workforce Overview

- WA Census figures for Retail-associated occupations that have experienced the largest changes based on workforce trends over 5 and 10 years are: [6]

Occupation	2021 % Share of Total Retail Workforce	% Female	% Male	5 YR Workforce Numbers: Trend May 2017 to May 2023	10-YR Workforce Numbers: Trend May 2013 to May 2023
6211 Sales Assistants (General)[1]	43%	68%	32%	Up	Up
6311 Checkout Operators and Office Cashiers	22%	72%	28%	Up	Up
1421 Retail Managers	18%	63%	37%	Down	Down
6113 Sales Representatives	5%	43%	57%	Down	Down
6214 Pharmacy Sales Assistants	4%	76%	24%	Down	Down
6219 Other Sales Assistants and Salespersons	3%	28%	72%	Up	Up
6215 Retail Supervisors	2%	51%	49%	Down	Up
6212 ICT Sales Assistants	1%	0%	100%	Down	Flat
6395 Visual Merchandisers	1%	71%	29%	Flat	Up

[1] NOTE: The occupation 621111 Sales Assistant also falls within the industry division Accommodation and Food Services. 2021 Census data shows that just over 8000 people in WA who listed 621111 as their occupation work within this division and the related Subdivisions Food and Beveridge. Of the 8000, 7000 listed their industry class as Takeaway Services. These workers fall within the industry scope of Retail and not Food and Hospitality.

- WA Census figures for Retail sectors that have experienced the largest changes based on workforce number trends over 5 and 10 years are:[7]

Industry	2021 % Share of Total Retail Workforce	% Female	% Male	5 YR Workforce Numbers: Trend May 2017 to May 2023	10 YR Workforce Numbers: Trend May 2013 to May 2023
Supermarkets and Grocery Stores	28%	62%	38%	Up	Up
Pharmaceutical and Other Store-Based	20%	65%	38%	Flat	Up
Clothing, Footwear and Personal Accessory	14%	80%	20%	Up	Up
Hardware, Building and Garden Supplies	9%	57%	43%	Up	Up
Specialised Food	8%	84%	16%	Flat	Down
Electrical and Electronic Goods	5%	14%	86%	Down	Down
Recreational Goods	5%	34%	66%	Down	Down
Department Stores	4%	79%	21%	Down	Down

- Count of Retail Businesses in WA 2021-2022

Group	Count	% Of Retail Businesses 2021-2022	% Change in Count 2020-2021 to 2021-2022	Entries 2021-2022	Exits 2021-2022
Non-Store Retailing[2]	1797	15%	13%	535	324
Other Store-Based Retailing n.e.c. [3]	1208	10%	9%	248	141
Clothing Retailing	1083	9%	12%	307	180
Pharmaceutical, Cosmetic and Toiletry Goods Retailing	950	8%	2%	94	73
Supermarket and Grocery Stores	827	7%	1%	97	86
Other Specialised Food Retailing	698	6%	2%	106	95
Hardware and Building Supplies Retailing	542	4%	-1%	54	59
Sport and Camping Equipment Retailing	440	4%	3%	56	41
Retail Commission-Based Buying and/or Selling	425	4%	6%	89	64
Newspaper and Book Retailing	399	3%	-3%	32	42

- Locations (SA2) in Western Australia with the highest number of retail businesses.

SA2 Name	Non employing	1-4 Employees	5-19 Employees	20-199 Employees	200+ Employees	Total
Perth (West) - Northbridge	153	114	69	18	0	355
Osborne Park Industrial	62	56	73	25	0	216
Fremantle	83	71	50	5	0	209
Madeley - Darch	83	58	48	12	0	201
Subiaco - Shenton Park	74	69	33	12	0	188

- Both in terms of the number of businesses and workforce employment figures, the majority of Retail business activity takes place in the Perth Metropolitan region. (see Map 1 pg 20) - Outside of Perth retail businesses are concentrated in areas that have primary industry activity. For example, the Pilbara, which services the mining sector, has very few retail businesses outside of the Port Hedland area.

[2] Non-Store Retailing - This Industry group consists of businesses without a physical store or shopfront who are mainly engaged in selling directly to the public. Internet retailing forms part of this group.
[3] Other Store-Based Retailing n.e.c. This group consists predominantly of specialist retail goods - for example, Clock retailing, Map retailing etc.

2. Workforce Opportunities and Challenges

2.1 Ongoing Workforce Demand/Opportunities

- ‘Supermarkets and Grocery Stores’ continue to dominate sales in WA within the retail Division. Accounting for nearly 38% of all retail sales in April 2022, reaching nearly $1.24 Billion - just over four times their closest Subdivision rivals ‘Takeaway Food Services’, and ‘Other Retailing’.[8]
- Those sectors that have seen the largest increases in sales over the past 5 years are focused on retailing specialist goods. This could be a symptom of large companies consolidating and dominating certain sectors where consumer demand aligns with economies of scale - thus leaving opportunities for small retailers to sell bespoke products to meet specialist/unique consumer needs. It is of note that “Other Retailing” also includes “Non-Store Retailing” which encompasses goods sold over the Internet.
- Clothes Retailing continues to perform strongly.[9] IBIS projects that both revenue and workforce numbers will grow. IBIS also reports that independent stores will continue to play a significant role in the sector over the next five years. Part of its resilience as a sector is due to customers preferring to try on clothing before buying. [10]
- Furnishings and household equipment saw a decline from its pandemic levels. But is still showing sales growth above its pre-pandemic levels. [11] Much of this growth will be in particular sectors such as domestic appliances and furnishings. [12] [13] However, this growth will come at the cost of smaller retailers as the industry consolidates.
- Supermarket and Grocery Retailing will continue to grow strongly. this will be at the cost of many smaller businesses due to the market consolidating. This consolidation by the large Grocery chains, and the price competition between them, also means that it is extremely difficult for new entrants to come into this sector.[14] What is important is the size of the sector - as any growth in this sector translates to large workforce increases. However, the flipside of this is that significant changes to their practices and processes via the introduction of new technologies etc., can also have a significant impact on the workforce.
- E-Commerce has created opportunities for some brick-and-mortar businesses (opening up new markets), but also issues for others (competition from online-only sellers who have fewer overheads). According to recent data from ABS, online retail sales have risen steeply from $1,007 billion in May 2017 to $3,908 billion in May 2023, marking an impressive 287% increase.[15] The COVID-19 pandemic and subsequent lockdowns were key factors driving this surge in online sales. The data also reveals that non-food retail experienced a faster growth rate in both value and share of non-food retail sales than online food retail. Non-food retail now accounts for about 17% of all non-food retail sales, while online food sales currently make up less than 6%. Although overall online retail sales have slowed post-COVID, they continue to grow in value and as a share of total retail sales. This unexpected cooling did lead to significant layoffs in the e-Commerce sector, with major platforms like Shopify, BigCommerce, and Amazon[4] letting go of thousands of employees. [16] In Australia Wesfamers online retail business Catch laid off a hundred staff due to the downturn.[5] Nonetheless, this does not indicate a change in direction for large retailers, as e-commerce is expected to keep growing in both sales and market share. What the data shows is a settling of the retail space between those in bricks and mortar stores and their online counterparts. Customers still appear to enjoy the experience of visiting physical stores for certain reasons that the sector should develop strategies to make the most of, like the opportunity to try products before buying, receive advice from

[4] Palmer, “Amazon to Lay off 9,000 More Workers in Addition to Earlier Cuts.”

[5] Stockdill, “Wesfarmers Axes 100 Jobs in Its Catch E-Commerce Arm.”

sales associates, or simply enjoy the shopping experience. Ultimately, the challenge for each sector is to focus on what customers want and need, depending on why they choose to shop either online or in-store.

- According to the 2023 Auspost Online Shopping Report:
  - In 2022 82% of Australian households made an online purchase
  - On average 5.6 Million households made an online purchase each month
  - For State growth WA saw the second-largest YoY increase in online sales at 11%
  - Outer rural and remote Australia saw growth of 6.4% and 5.7% respectively. Outperforming the national average.
- For regional areas, tourism plays a vital role in the Retail ecosystem. Currently, the WA tourism sector is still in recovery mode post-pandemic travel restrictions. In YE Mar 23, 22-million-day trips were taken within the State and 11.1 million overnight (domestic and international) visitors came to or travelled within WA. Together. these visitors spent $15.9 billion in the State - S7.9 billion (46%) of which was spent in regional WA. Visitors spend is $2.4 billion 18% ahead of pre-COVID-19 levels. Tourism WA data shows a slight increase in the percentage of visitors either staying regionally only - or combining a regional stay with a Perth stay. Even though visitor numbers for International tourists remain below their 2019 levels intrastate and interstate numbers are significantly up over the same period.[17]
- There are some significant business investments coming up in WA that will create a demand for skilled workers.:
  - *7-Eleven's investments in WA will hit $50 million since beginning in 2022* [18]
  - *US fast food giant Wendy's has announced it plans to roll out "hundreds" of stores in Australia in the not-too-distant future.* [19][6]
  - *McDonald's is aiming to invest $1 billion into opening 100 new restaurants across Australia and upgrading its existing network.* [20]
  - *TK Maxx set to open first WA store with more planned* [21]
  - *$792 million expansion of Westfield Booragoon, which would make it the state's largest shopping centre, approved by WA's peak planning body.*[22]
  - *AMP Capital signalled a further expansion of the $800 million Karrinyup Shopping Centre development by adding more luxury retailers, with groups including Louis Vuitton expressing interest.* [23]

2.2 Workforce Development Challenges

- For small and medium-sized retail businesses the challenge they face if they pursue online sales is making e-Commerce operations viable. Investment in tech, a website/e-Commerce platform, training, and then having to take account of the ongoing charges and time to manage the site, means that the return on investment can be extremely low. For large businesses with the capacity to invest - and the advantage of having stores and brand awareness nationwide, online is worth the investment. What this situation has created is a widening gap and growing competition, between small to medium-sized bricks and mortar retail and online retail.
- The speed with which interest rates have increased, their fastest pace in history, has caused concern across the retail sector. In February The National Retail Association (NRA) wrote that the Reserve Bank of Australia's (RBA) "ninth consecutive interest rate hike is heartbreaking for Australian consumers and retailers who are already struggling to navigate economic uncertainty." This may lead to businesses cutting their investment in hiring new staff and training their existing staff.

[6] The occupation 621111 Sales Assistant falls within the industry division Accommodation and Food Services. 2021 Census data shows that just over 8000 people in WA who listed 621111 as their occupation work within this division and the related Subdivisions Food and Beveridge. Of the 8000, 7000 listed the class Takeaway Services. This Class falls within the industry scope of Retail - and therefore the sector utilizes the Retail training package.

- The latest crime statistics show stealing offences in WA have risen by 12.6 per cent from January to September last year with some suburbs like Joondalup, Armadale and Morley seeing figures almost double since the start of this year. [24] [25]
  - ABS Figures for 2022 show that in Western Australia:[26]
    - Retail comprised over a quarter of all robbery locations (26% or 326 victims).
    - Retail was the most common location for other theft (42% or 30,440 victims), followed by a residential location (31% or 22,136 victims).
  - The ARA and the Shop, Distributive and Allied Employees Association (SDA) collaborated in March to urge state and federal authorities nationwide to adopt the same measures as South Australia. In 2020, the South Australian government implemented a maximum sentence of five years imprisonment for individuals found guilty of assaulting a retail employee during work, and seven years if the assault resulted in harm.[27]
- Providers and job engagement stakeholders are struggling to connect with national organizations in Western Australia to discuss hiring practices. This has made it difficult for job seekers to find work, as most must apply through online portals with many receiving no response to their applications. Automation of hiring processes has also led to a reduction in local HR staff. Industry reports that companies often reject applicants due to their email address being linked to previous rejections. Lastly, when job openings are advertised locally, it is often challenging to speak with the store manager as hiring decisions are made at the head office level.
- Regarding criminal records - some industry sectors reported that they were happy to hire a person with a criminal record - but they would have concerns dependent upon what the person has been imprisoned on. For a person living with a disability, the barrier to entry for small retailers is the cost of implementing changes to the work environment.

2.2.1 ANZSCO

- As of now, ANZSCO and ANSZIC have not provided a clear definition for e-Commerce, making it challenging to gather precise data on its impact on traditional retail. It is unclear whether e-Commerce roles should be categorized under Retail or ICT. Thankfully, the upcoming ABS ANZSCO review may lead to a more comprehensive classification system.
- There is a need for ANZSCO occupations that accurately reflect the varying skill levels within the retail sector. Large retail businesses have multiple levels of responsibility and oversight, and require specific skills for different areas and processes. However, there is currently no appropriate ANZSCO code for positions such as 2ICs, Assistant Managers, Floor Managers, or Department Managers, particularly for product departments found in large stores and for managers overseeing specific processes (e.g. returns manager). While these roles typically report to the Retail Manager (General), those working in them do not consider themselves supervisors and are hired by the industry at a manager's award rate. Additionally, they do not classify themselves as Marketing Managers based on the tasks and skill level defined by the ANZSCO code for that occupation. If they are responsible for managing marketing for the store, they view it as part of their role rather than their occupation. This creates a reporting gap, as there is a level of skill as defined under AQF that is not represented in the current ANZSCO code.
- There is currently no unique ANZSCO for Fast Food workers. Fast Food workers fall under the occupation 621111 Sales Assistant. 2021 Census data shows that just over 8,000 people in WA who listed 621111 as their occupation work within the division Accommodation and Food Services and the related Subdivisions Food and Beveridge. Of the 8000, 7000 listed the class Takeaway Services. This Class falls within the industry scope of Retail - and therefore the sector utilizes the Retail training package.

2.2.2 Migration:

- Important updates were recently announced by the Australian Government regarding the Student (subclass 500) visas and Temporary Graduate (subclass 485) visas. Effective July 1, 2023, those on student visas will be permitted to work up to 48 hours per fortnight,[28] while international graduates with eligible qualifications will be granted an additional two years of post-study work rights on their Temporary Graduate visas. This increase in work hours from the previous limit of 40 hours, implemented prior to the pandemic, is a welcome relief for the retail and hospitality industries, which rely heavily on flexible, casual workers. These sectors are fast-paced and require a workforce that can adapt quickly to changing demands. The Australian Retailers Association has even urged for these changes to become permanent, as they recognize the significant contribution that international students make to the retail workforce.[29]
- The low AQF skill level rating for both Sales Assistant General (Skill Level 5) and Retail Supervisor (Skill Level 4) means that neither occupation is deemed to be of high enough AQF level to be considered for migration pathways by Government. Regional Development Councils have the capacity to provide migration pathways for an in-demand occupation of any level via Designated Area Migration Agreements (DAMA). However, stakeholders reported that for them the cost vs benefit of using international migration pathways means that for most vacancies it is not an option. The process of seeking endorsement, lodging a labour agreement, proving that they could not hire an Australian Citizen or Permanent Resident, and then still bearing the responsibility of sponsoring the applicant is too onerous. [30]
- Even though Retail Manager (General) is AQF level 2 (so falls within the AQF range to be considered for migration) stakeholders report that, as with Retail Assistant and Retail Supervisor, the effort and expense of pursuing a migration pathway to fill a vacancy is often too great.

2.3 Supply and Demand for Workforce

- Traditionally, retail has had one of the highest workforce turnover rates compared to other sectors.[31] There are multiple reasons for this - many of which are compounded due to the residual effects of COVID-19. Listed below are some of the reasons behind the supply issues facing the sector. It is to be noted that the impacts of the below are felt throughout the workforce - from Sales Assistants to General managers. Either due to being enticed by the better pay in other sectors, or through the diminishing pool of workers - as the sector tends to promote from within its own workforce to fill the roles of supervisors and managers.

2.3.1 General labour shortages

- The economy has experienced a demand spike post COVID. [32]
- Over the previous 2 years overseas numbers of students and working holiday visa workers, a traditional source of labour for the retail sector, have been limited due to COVID travel restrictions. [33] [34]

2.3.2 Attrition Rates

- Retail has a longstanding challenge with staff turnover rates. ABS job mobility data for 2021/2022 places retail in the top 3 occupations by metrics measured. [35] For many young people, retail is seen as a way to earn money whilst they study or develop other career pathways. [36]
- Competition from sectors offering better pay and conditions would drive demand for workers in the retail sector.[37]
- Ageing out of the workforce. Some stakeholders have spoken of concerns that, currently, the supply of young people coming into the sector is not of a high enough rate to take into account those older people leaving.[38] [39]
- Competition from other industry sectors. In regional areas this is mainly from the resources or agricultural sectors. [40] [41] There is also competition for workforce from the Hospitality sector. As with retail, hospitality has few barriers to entry and the skills required for both are very similar.
- The retail sector in WA employs approximately 123,000 people. [42] This large workforce, coupled with its

high attrition rates caused by multiple factors, means that it has a persistently high demand for workers. The problem is currently made worse by WAs low unemployment rate of 3.9%. [43]

2.3.3 Housing and Childcare

- Housing has become a significant issue industry consultations and meeting with regional CCIs reported that there was a lack of affordable housing/shortage of housing. The effects of this were twofold:
  - For regional areas housing costs were traditionally a factor in a person's decision to move to a regional area. However, if housing costs are comparable to metropolitan areas, then regional areas no longer have this as a selling point. [44]
  - High housing costs feed through to higher wage costs for retail businesses. It is difficult in this situation for retail to compete with industries such as mining - as a person on a retail wage will always be outbid on a property by a person in mining. [45]
- industry consultations and meeting with regional CCIs reported that there was a lack of affordable, or even local, childcare services. Retail has grown dependent upon a part-time, predominantly female, workforce. [46] [47] Many of these P/T workers have childcare responsibilities, so can only work specific hours. Having a childcare option would provide flexibility for both the employer. [48] [49]

2.4 Technology

2.4.1 Merchandising

- The retail industry is embracing new technologies by utilizing tablets and mobile devices to track sales and inventory movements. Major suppliers are also relying on third-party providers for their merchandising needs through the use of these technologies. With handheld devices, merchandisers can easily verify stock levels, reorder products, and keep tabs on sales performance. This job offers flexibility, making it an ideal opportunity for individuals who are returning to work, particularly those who need to collect their children from school.

2.4.2 Buy Now Pay Later (BNPL)

- Buy now, pay later (BNPL) is becoming a popular credit option in Australia, with over 7 million active accounts creating $2.7 billion in new revenue for merchants and retaining 120,000 jobs.[50] However, increased regulations are being introduced, requiring BNPL providers to hold an Australian Credit Licence or represent a licensee. Enquiries into BNPL and other short-term lending products have increased by 55% month on month in February 2023.

2.4.3 e-Commerce and omnichannel supply solutions

- What has come out of COVID is a move towards a more hybrid and agile consumer experience. For example,
  - the utilization of 3PL models (where retailers/businesses piggyback on the ecommerce/logistics infrastructure of another business, saving on costs and time)[51]
  - the move to Dark stores (these are stores that sit somewhere between a warehouse and a retail outlet. They are laid out like a store - but there are no customers and no till point. The staff then pick from the shelves in an environment they are familiar with. [52] [53].
  - the integration of the high street store as a local distribution point - where a customer can place an order via the website and then can either collect, or have it delivered, from their nearest store.
- E-commerce is currently going through an unstable period. Post-COVID mandates, consumers returned to bricks and mortar retailing in larger numbers than expected.[54] [55] [56]. The effects of this saw large lay-offs from e-commerce's major players Shopify = 1000 staff,[57] BigCommerce = 180 staff, [58]Amazon another

9000 this year on top of the 18,000 at the end of 2022[59], and Wesfamers Catch-e = 100 [60], are examples. And recently the Australian online marketplace RedBubble went through a major $45 Million cost-cutting restructure due to falling revenues.[61] However, these job cuts and cost-saving exercises should not be seen as a change in direction for large retailers and the public's appetite for online retail, but as a slowing by consumers in their use and uptake of e-commerce.

2.4.4 Artificial Intelligence (AI) and Augmented Reality (AR).

- The retail industry has undergone a significant transformation in recent years with the advent of AI technology. Large retailers use AI technology to enhance their operations through improving customer interactions. AI Chatbots and machine learning have enabled retailers to offer customized customer experiences and streamline their operations. The growing demand for personalized, seamless, and convenient shopping experiences has been the driving force behind the shift towards AI. The global market for artificial intelligence in retail was valued at $5.50 billion in 2022 and is projected to reach $55.53 billion by 2030, with a projected increase to $7.14 billion in 2023. [62]
- AI-powered solutions can benefit retailers in numerous ways, such as reducing operational costs, offering a seamless omnichannel experience, enhancing marketing activities, facilitating faster and more accurate decision-making, optimizing inventory management, and providing personalized customer service. In October 2022, Google Search introduced new tools to improve visual and voice shopping. [63] making the AI retail experience even more seamless and user-friendly. Established retail brands are continuously investing in innovative technologies to enhance customer engagement.
- While large enterprises and global retailers have the resources to implement AI technology for in-store operations and online portals, small and medium-sized enterprises face challenges in adopting the technology due to a lack of infrastructure and technical expertise. The high cost of implementing AI in retail solutions also poses a significant barrier for small retailers, limiting its implementation and market expansion.
- Smart mirrors, called smart displays or digital mirrors utilise Artificial Intelligence, Augmented Reality, and gesture recognition technology. Through a combination of these technologies, smart mirrors can superimpose clothing onto a person's image. The mirror acts as a virtual changing room allowing customers the ability to change outfits in a matter of seconds. They no longer need to get undressed and can try dozens of different combinations in a fraction of the time it would take them to change clothes physically. [64]
- Shopping apps can now provide users with the opportunity to customize their clothing using a mobile phone. For example, Nike recently released an app that allows customers to choose a variety of colour options, and the capacity to select different parts of the sneaker's finish. Once a customer has made their choices, they can try on the shoes through a 360-degree digital overlay and purchase their customized pair by clicking "Shop now." [65]

2.4.5 Impact of technology and automation on workforce:

- Possible negative impacts on retail workforce numbers may be caused by either:
  1. Development of technology that replaces a role that is still required - but is now done by via technological means. For example, stock checking and stock replenishment. [66]
  2. Development of technologies that bypass processes that would normally require a staff member to perform them, therefore, making the role redundant - this is not the automation of a role but role redundancy. For example, stores automatically charge customers via NFC (Near-Field-Communication) as they leave the store. There is now no longer a need for a cashier.[67] [68]
- A 2022 Australian National University study found that approximately one-quarter of the retail workers who responded to their survey (n. 1,160) were concerned they would lose work if they did not keep up with the technical skills required. They were also concerned that technology would drive down wages.

These concerns were echoed by stakeholders representing union members. [69] They added that they were not worried about a drop in employment numbers in the retail sector, as job growth has been consistent over the previous 3-5 years but concerned about downward pressure on wages due to the introduction of technology.

- Monitoring and tracking of work being linked to productivity targets. There is growing anxiety in retail that software that is intended to assist them in their daily work might also be used to track their productivity.[70]

3. Environmental, Social, and Corporate Governance (ESG)

- Climate change and the concept of Environmental, Social, and Governance (ESG) have been determined as a priority for the State government regarding future policy objectives. [71] The criteria cover aspects such as community relationships, reputation, labour relations, indigenous policies, diversity, and inclusion. Lastly, the criteria include the procedures that enable effective decision-making to comply with the law and satisfy the needs of stakeholders.

  The 8 priority industries identified by the WA State Government are:

  - Energy
  - Tourism, events, and creative industries
  - International Education
  - Defence industries
  - Mining and METS
  - Space Industries
  - Health and medical life sciences
  - Primary industries

- The ACCC recently released draft guidance for businesses which make environmental and sustainability claims in relation to the products and services they provide/sell. This guidance aims to clarify the responsibilities that Australian businesses have under the Consumer Law when making environmental and sustainability claims. It outlines the ACCC's recommended practices for businesses to ensure that their claims are transparent, precise, and reliable, ultimately providing consumers with accurate information about their environmental impact. [72] A recent sweep conducted by the ACCC revealed that the cosmetic, clothing and footwear, and food and drink industries had a higher incidence of concerning claims compared to other industries. In fact, these three industries had a significantly higher proportion of concerning claims than the average. Specifically, 73% of businesses reviewed in the cosmetics industry made concerning claims, while 66% of those reviewed in the clothing and footwear industry raised concerns. In the food and drink sector, 64% of businesses reviewed were found to have concerning claims.[73]

3.1 Supermarkets

- Supermarkets Coles, Woolworths and Aldi have announced their plans to resume soft-plastic recycling. The supermarkets plan to begin a pilot program in select stores by the end of the year.[74] The program is dependent on the processing of nearly 12,500 tonnes of leftover plastic from the REDCycle program which came to an end in November 2022 after it emerged that the plastics consumers had returned to supermarkets to be recycled were instead put into storage. [75]

3.2 Fashion and Clothing Retail

- The Minister's Product Stewardship Priority List for 2022-23 now includes clothing textiles.[76] This list highlights the areas where the government will provide funding, such as the National Clothing Product Stewardship Scheme. The scheme aims to manage products throughout their lifecycle to protect the environment, through recognizing the responsibility of those involved in designing, manufacturing, selling, and disposing of products. By implementing good product stewardship practices, the aim is to reduce waste and pollution, limit water and energy use during production, and lower greenhouse gas emissions. This includes designing for longevity and modularity, clean manufacturing, and promoting reuse and recycling.

- The Australian Fashion Council (AFC) is leading the development of a scheme outlining those programs which aim to reduce the environmental impact of clothing textiles. AFC research[77] found that:
    - Australians bought 383,000 tonnes of new clothing in 2018–19 – about 56 items per person.
    - 210,000 tonnes of clothing are donated or re-used annually.
    - Very little recycled sourced fibre is used in clothing fabric production.
    - In response to these research findings, The National Clothing Product Stewardship Scheme seeks to:
    - collect data on the textile lifecycle
    - reduce the amount of clothing sent to landfill
    - improve clothing design and production to increase longevity, re-use and recycling.
    - Making textiles a priority

The Scheme is expected to be launched in mid-2023. It should be noted that under the Recycling and Waste Reduction Act 2020 [78] such schemes/initiatives can be either voluntary or mandatory. In the case of NCPSS, it is voluntary. However, in June 2023 the Minister for the Environment and Water *"issued a clear directive to clothing retailers that the Seamless voluntary scheme would be mandated if not taken up by enough businesses in the future."* [79]

4. Training and Education Needs

4.1 Current and Anticipated Training Needs

- 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.
- In Western Australia, 44% of retail businesses do not have any employees, while 52% have fewer than 19 staff members. As a result, there are limited chances for employees to advance in their careers, causing them to seek better job opportunities elsewhere. This constant turnover places an extra burden on SMEs due to the need for ongoing training and resources to hire and onboard new staff. To address this issue, it is essential to have a highly skilled workforce and for business owners to develop the necessary skills to effectively manage and retain their teams for long-term success.
- 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 industry is beginning to utilise software and applications to provide both support and training, as well as improve information flows, for its staff members.

For example,

- Task management software that outlines what the staff member needs to accomplish for the day. This kind of software also integrates compliance requirements into reporting procedures.
- Communication software enables team members to share information instantly across locations.

- Staff rostering software assists managers with planning and provides staff members the capacity to more easily change shifts
- Stock management and POS software/hardware. Modern handheld equipment means staff are no longer tied to a till point. They can assist a customer, check stock, process a sale etc… all from a handheld device.
- HR and Training. Bunnings has recently moved to overhaul its employee support and training systems. Its aim is to cut costs through providing these services via online platforms. [80] Small to medium-sized business are also using this software to ensure they are compliant with training and H&S requirements. [81] These platforms can be accessed via an employee's mobile phone.

All of these new systems entail an understanding of basic concepts in the use of computer software/hardware and applications. This will require training in new technologies across the spectrum of potential retail workers - as the industry reports that even young people, who are normally perceived as "tech-savvy", struggle with basic computer skills when it comes to working with standard business/industry software packages - for example, understanding file structures and the use of basic Office software packages.

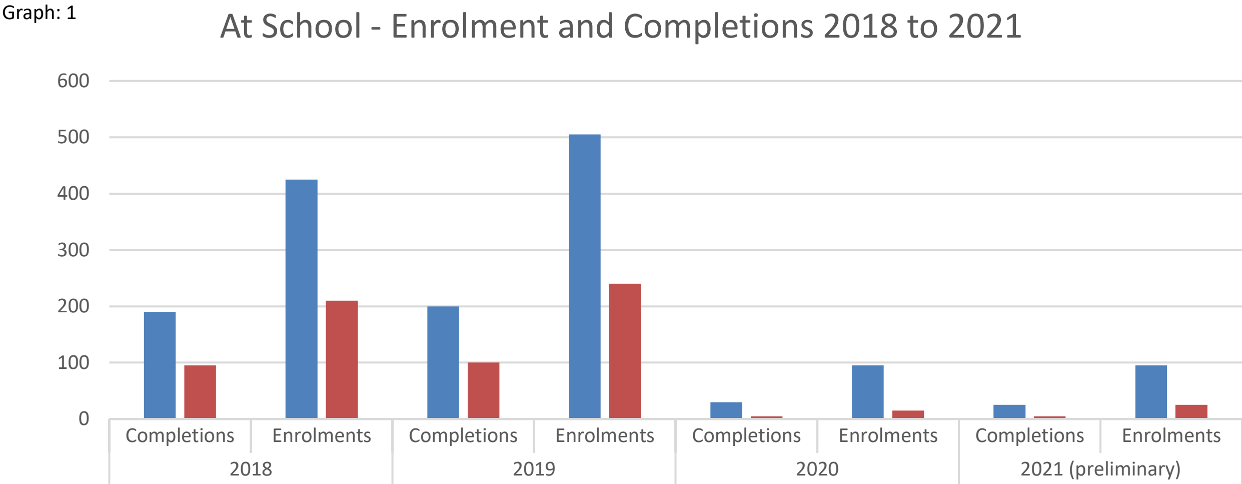
4.2 Training Challenges and Opportunities

4.2.1 Challenges

- There has been no major update to the SIR training package since 2016. This has led to many of the skill-sets being outdated as the industry has gone through major technological changes that have impacted job roles and requirements significantly. [82] [83]
- Stakeholders said there should be more focus and resources given over to ensuring completions - rather than just enrolments - as an outcome. RTOs say that there is an issue with the industry employing people through government-funded initiatives, and then letting them go after the funded training period. [84]
- Retail is viewed as a suitable pathway for under-represented groups to enter the workforce. Therefore, providing units of competency that encourage and enable the participation of under-represented groups in the community would be beneficial to industry and employees. Both from the perspective of customer engagement and that of an inclusive workplace. For example - There are currently no units of competency that enable staff to build the skills and confidence to work with colleagues living with a disability - either physical or psychological. There are generic units on diversity - but these do not provide the specific knowledge required to understand the needs and support that a person living with a disability requires in the workplace. This training gap also extends to engaging with customers who are living with a disability. Or, in some cases a customer living with mental health issues - who, without training, might be treated as an aggressive customer.
- To meet the WA State goals for sustainability it is essential to recognize green skills, both task-specific and non-formal, in the formal assessment or skills recognition process. This is especially important in the workplace, where these competencies are demonstrated on the shop floor. Additionally, when adopting new green technologies, it would be valuable to receive educational instruction from the suppliers of the technology, also known as "vendor training." It is important to establish how such competencies would fit into the broader skills recognition system.
- One major obstacle to implementing effective vocational education and training (VET) programs to assist with the transition to a green economy is the limited availability of suitable facilities, particularly in rural or remote areas. Outdated facilities can also hinder progress. Additionally, attracting and retaining skilled trainers in a competitive job market can be difficult. Encouraging existing workers to upskill, especially in emerging sustainable or green technologies, can also be a challenge. [85]
- Payment Tables not keeping up with inflationary costs - Wheatbelt was given as an example. The region is large with low population density - so fuel costs for trainers have become an issue. [86]

- Graph 1 According to NCVER's VET data, there has been a significant decline in enrolments and completions for the two primary retail qualifications, namely SIR20216 Cert II in Retail and SIR30216 Cert III in Retail, under the 'At School' category. This could be attributed to the growing competition from other industries that are targeting school-aged students. In recent times, other sectors facing workforce shortages have started enticing students with higher incentives through programs like the Year 9 taster Program or school VET coordinator days that showcase career pathways. The shortage of skilled workers has also compelled employers from various industries to consider students who display commitment and a positive attitude, even if they lack excellent academic results.

Graph: 1



	2018		2019		2020		2021 (preliminary)	
	Completions	Enrolments	Completions	Enrolments	Completions	Enrolments	Completions	Enrolments
SIR20216	190	425	200	505	30	95	25	95
SIR30216	95	210	100	240	5	15	5	25

4.2.2 VET In Schools Register [87]

Certificate II in Retail Services
Auspicing advice High Risk

- Delivery should be undertaken by an industry-qualified trainer to ensure students are trained to industry practices and standards.
- Schools are generally unlikely to meet the workplace/simulated environment, resource and/or trainer/assessor requirements under an auspicing arrangement.

Certificate III in Retail
Auspicing advice N/A – IBT is not supported.

- Delivery is only supported via SBT, due to the skill level and experience required to complete the qualification to an industry standard.
- There are likely to be no employment opportunities for students undertaking this qualification outside of these arrangements.

4.2.3 Opportunities [7]

- In January 2023 the below three Retail skill sets were provided funding under their respective workforce initiative.
  - Retail Customer Engagement Skill Set (SIRSS00024) approved as a Recovery Skill Set.

[7] Graph 1 https://www.ncver.edu.au/research-and-statistics/data/databuilder

As the skill set Retail Customer Engagement Skill Set was endorsed as a Recovery skill set, participants with a concession or aged under 25 years would are eligible for fee-free training.

- Retail Customer Relationship Skill Set (SIRSS00025) approved for the Lower Fees Local Skills funding.
- Retail Leadership Transition Skill Set (SIRSS00035). approved for the Lower Fees Local Skills funding.

List of current workforce engagement-funded programs:

New Entrant Traineeships [8]		
TR07270	RETAIL (LEVEL 2) [305]	SIR20216
TR07290	RETAIL (LEVEL 3) [395]	SIR30216#
TR06630	RETAIL MANAGEMENT (LEVEL 4) [350]	SIR40316#
Participation – Equity/Work Readiness/Priority Industry Training (PIT)		
SIR10116	Certificate I in Retail Services	General Industry Training
SIR20216	Certificate II in Retail Services	General Industry Training
SIR30216	Certificate III in Retail	Targeted Fee Relief
SIRSS00024	Statement of Attainment at Certificate II Level Retail Customer Engagement	Fee Free
SIRSS00025	Statement of Attainment at Certificate III Level Retail Customer Relationship	Targeted Fee Relief
SIRSS00035	Statement of Attainment at Certificate IV Level Retail Leadership Transition Skill Set	Targeted Fee Relief

- **The Department of Employment and Workforce Relations (DEWR)** is the federal body set up to 'support people to have safe, secure and well-paid work with the skills for a sustainable future'. The Department recently provided funding for initiatives that target training and workforce engagement. The two roles that deliver these projects are:

  Workforce Specialist.
  Workforce Specialists design and execute strategic projects to fulfil the workforce requirements of specific industries and occupations. They connect qualified individuals to Workforce Australia Services, Workforce Australia Online, and Workforce Australia - Transition to Work. The projects delivered by Workforce Specialists will actively target the industries and occupations identified in the Framework. Workforce Specialists projects will complement existing services and where possible leverage existing programs and initiatives in project design and operation. The role of a workforce specialist is not linked to any particular industry sector meaning any workforce Specialist can develop a program for any industry sector anywhere in Australia. The Australian Retailers Association and the National Retail Association have contracts to engage workforce specialists. There is currently no information regarding the development of projects for the retail sector.

  Workforce Facilitators
  Each Employment Region has a Local Jobs and Skills Taskforce led by the Employment Facilitator. The task force consists of up to 10 members, including representatives from local stakeholders such as employers or industry groups, education and training providers, employment services providers, and local and state governments. They work together to find solutions that help people find work or training by prioritizing local employer needs and addressing the employment barriers of local citizens. The Taskforces also support

[8] https://tamsrtoportal.dtwd.wa.gov.au/pt-rpt-launcher/

the Local Jobs Plan for their respective region by identifying key employment and training priorities and providing a framework for driving employment outcomes within the local labour market. If needed, the Local Recovery Fund can support activities that address issues identified in the Local Jobs Plan.

- **Jobs and Skills WA** collaborates with industry, business and employers to rebuild and enhance the WA workforce through skilling solutions. An example of the strategies and programs they support include.
  - 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 career.

4.3 Career Pathways and Graduate Outcomes

- The current NCVER Student Outcomes Survey provides insights into employment outcomes, satisfaction with training, and further study outcomes. Of students who have completed their VET studies. [9]

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 Retail Services	374	72.8	55.5	34.3	88.2	30300
Cert III In Retail	1512	86.7	73.1	31.6	89.1	44200

- 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 pasted 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.
- Career options include but are not limited to:

  Cashier
  Sales Associate
  Store Manager
  Buyer
  Visual Merchandiser
  Advertising & Marketing Manager
  Inventory Manager
  Stocker
  Retail Warehouse Worker
  Social Media Manager
  Customer Service Representative
  Human Resources

[9] https://www.ncver.edu.au/research-and-statistics/publications/all-publications/vet-student-outcomes-2022

Cleaning & Maintenance
Logistics
Loss Prevention Manager
Team Leaders & Floor Managers

- Examples of Occupational roles and the VET qualification that is most suitable.

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			

- The table shown above displays VET qualifications that are most appropriate for specific job positions. It's important to note that working in the retail industry does not have any mandatory requirements. However, for managerial or higher-level roles, most companies prefer candidates with experience and expertise in the specific retail sector they operate in, such as clothing or fashion retail.

5. Your input

- **Why this report?** The WA Government has 8 skills councils to engage stakeholders to advise the State Training Board and the Department of Training and Workforce Development on the training and priorities of industry with particular reference to skills development.

- **Input**. LDSC welcomes input on 08 9388 8781 or https://www.ldsc.asn.au/contact.html

- **Industry Advisory Group.** LDSC invites stakeholders to join our Retail Industry Advisory Group 08 9388 8781 or https://www.ldsc.asn.au/contact.html

6. Industry Consultation

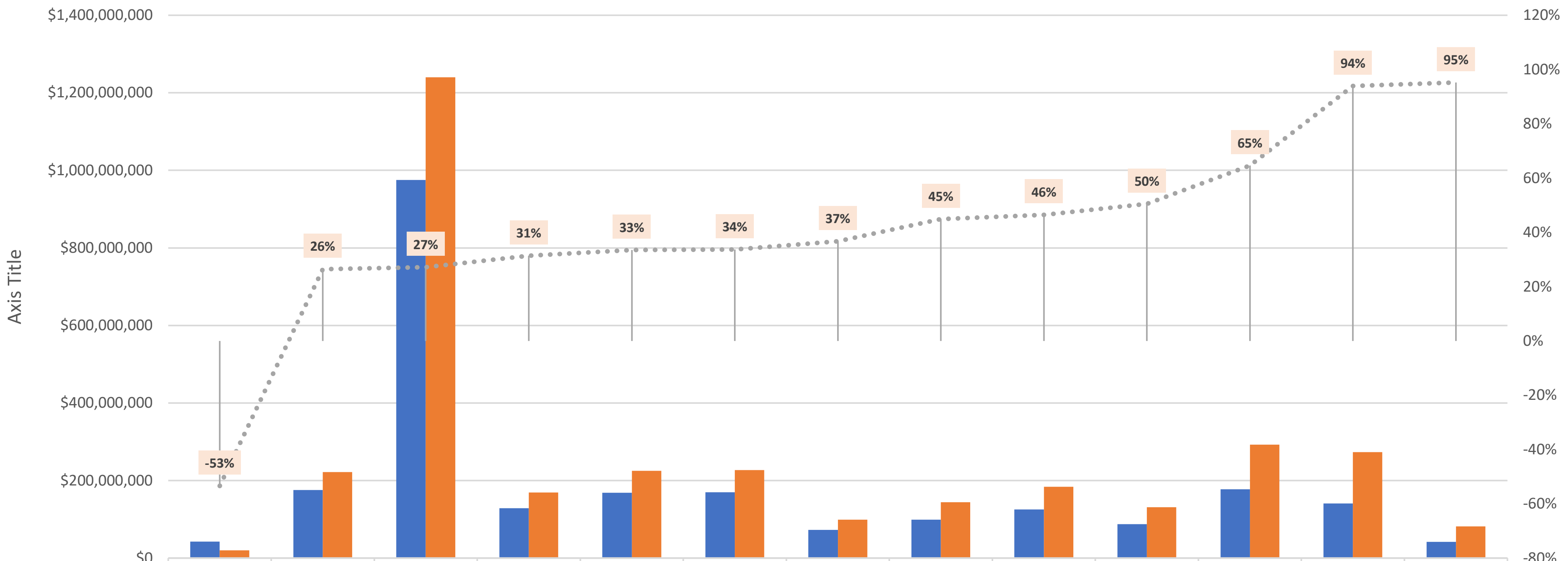
Regular industry consultation is undertaken by the Logistics and Defence Skills Council via Industry Advisory Groups (IAGs), Registered Training Organisations (RTOs), LDSC Annual RTO Forums, LDSCs Board of Management (BoM) meetings, regional consultations, participation in industry advisory committees, teleconferences, email, social media, and the use of online surveys.

Ongoing contact is made throughout the year via emails, newsletters, surveys (our most recent State of the Industry Survey had 89 industry respondents: across all industries under the LDSC remit. This data has also been included in these responses); and other channels by the LDSC to members and non-members of our RTO and IAG networks. Consultation is also maintained through ongoing ad-hoc group and individual meetings throughout the year.

Participating organisations include many small, medium, and large companies and organisations within the retail sector across WA. These include local Chambers of Commerce and Industry (CCIs), Industry Associations, Unions, Local and Commonwealth Government Departments, and Regional Development organisations.

7. Graphs and Tables

Graph 2: WA Retail - Comparison of May 2017 to May 2023 Sales Data by Industry Sub-Division showing % increase in sales over a 5 Yr Period 2018-2023

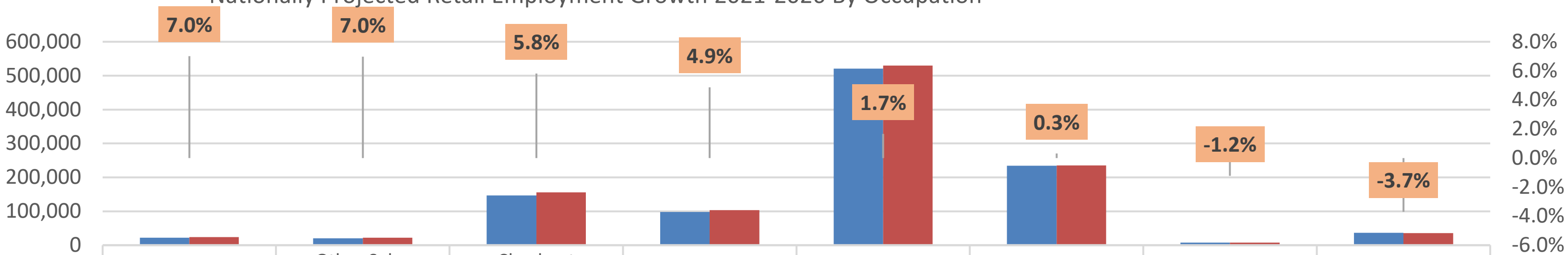


	Newspaper and book retailing	Electrical and electronic goods retailing	Supermarket and grocery stores	Liquor retailing	Hardware, building and garden supplies retailing	Department stores	Footwear and other personal accessory retailing	Clothing retailing	Furniture, floor coverings, houseware and textile goods retailing	Other specialised food retailing	Takeaway food services	Other retailing n.e.c.	Other recreational goods retailing
Apr-18	$42,500,000	$175,600,000	$975,200,000	$128,700,000	$168,500,000	$170,000,000	$72,700,000	$99,400,000	$125,600,000	$87,400,000	$177,700,000	$140,900,000	$41,900,000
Apr-23	$19,800,000	$222,100,000	$1,240,000,0	$169,100,000	$224,900,000	$227,300,000	$99,400,000	$144,000,000	$184,000,000	$131,500,000	$292,500,000	$273,200,000	$81,800,000
% Difference	-53%	26%	27%	31%	33%	34%	37%	45%	46%	50%	65%	94%	95%

[10] Graph 2 https://www.abs.gov.au/statistics/industry/retail-and-wholesale-trade/retail-trade-australia/latest-release

Graph: 3

Nationally Projected Retail Employment Growth 2021-2026 By Occupation

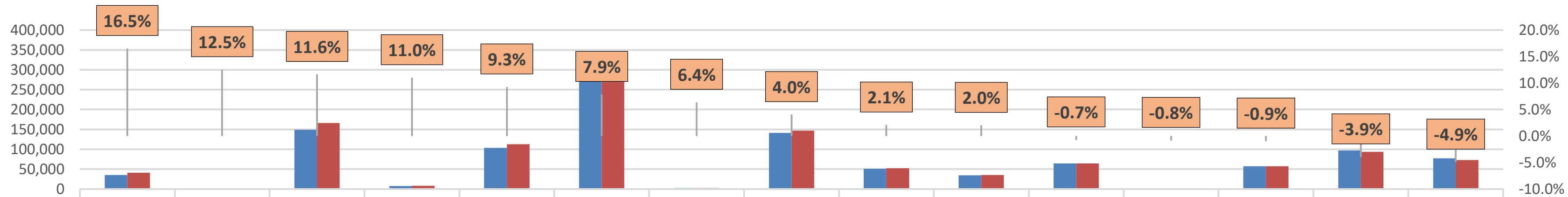


	ICT Sales Assistants	Other Sales Assistants and Salespersons	Checkout Operators and Office Cashiers	Sales Representatives	Sales Assistants (General)	Retail Managers	Visual Merchandisers	Retail Supervisors
Employment level - Nov' 2021	22,436	20,763	147,022	98,330	521,057	234,398	7,602	36,948
Projected employment level - No' 2026	24,008	22,210	155,564	103,111	529,669	235,113	7,508	35,581
Projected employment growth - 5 YR to Nov' 2026 %	7.0%	7.0%	5.8%	4.9%	1.7%	0.3%	-1.2%	-3.7%

Employment level - Nov' 2021 Projected employment level - No' 2026 Projected employment growth - 5 YR to Nov' 2026 %

Graph: 4

Nationally Projected Retail Employment Growth 2021-2026 By Industry



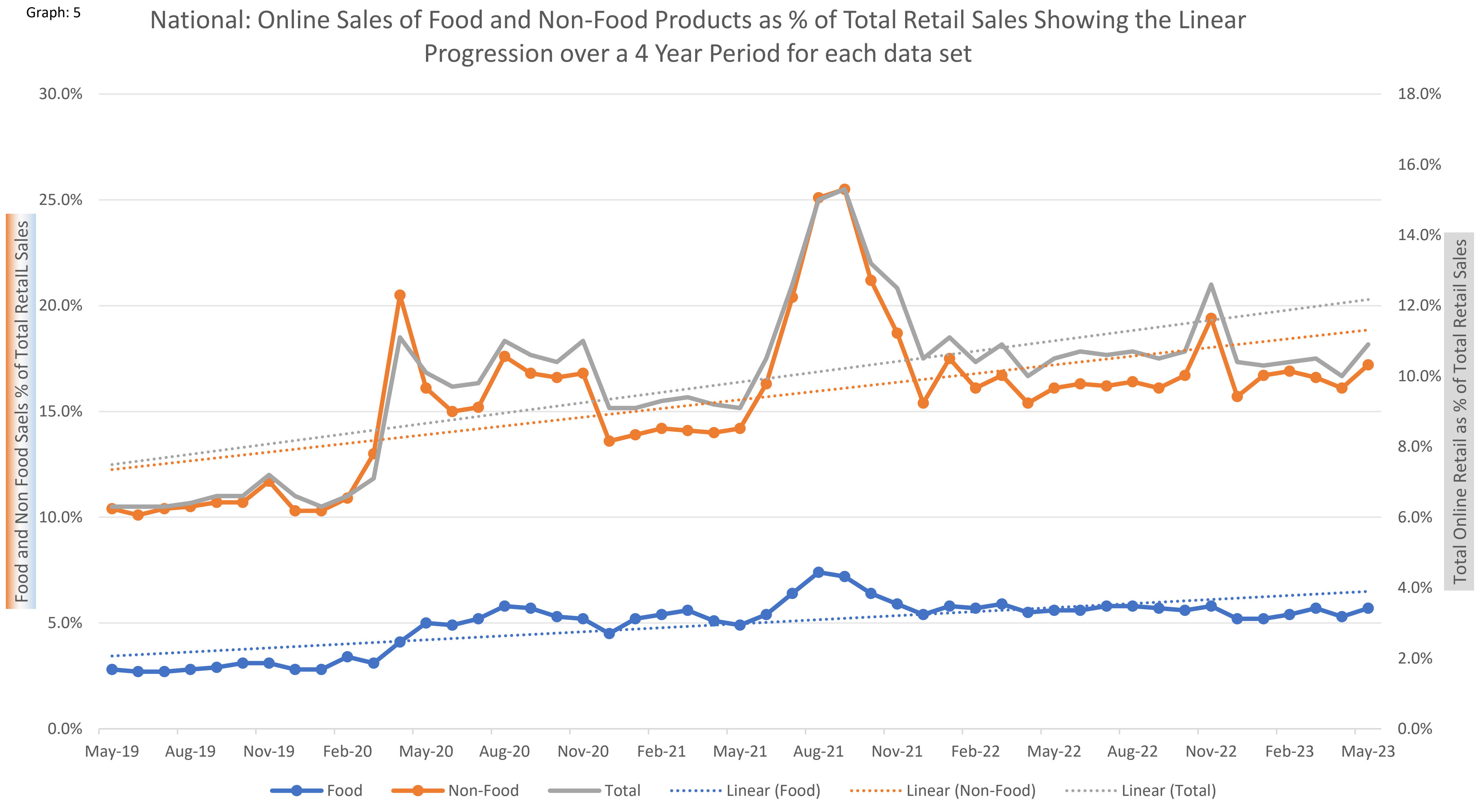
	Non-Store Retal	Commission-Based Buying and/or Selling	Pharmaceutical and Other Store-Based	Food, nfd	Hardware, Building and Garden Supplies	Supermarket and Grocery Stores	Retail Trade, nfd	Clothing, Footwear and Personal Accessory	Recreational Goods	Other Store-Based, nfd	Electrical and Electronic Goods	Non-Store and Commission-Based Buying and/or Selling, nfd	Furniture, Floor Coverings, Houseware and Textile Goods	Specialised Food	Department Stores
Level - Nov' 2021	35,221	225	148,940	7,452	103,397	316,429	2,573	140,951	51,279	34,785	64,804	437	57,590	97,533	77,163
Projected level - No' 2026	41,038	253	166,250	8,273	112,973	341,276	2,737	146,652	52,347	35,486	64,331	433	57,043	93,705	73,372
Projected growth - 5 YR to Nov' 2026 %	16.5%	12.5%	11.6%	11.0%	9.3%	7.9%	6.4%	4.0%	2.1%	2.0%	-0.7%	-0.8%	-0.9%	-3.9%	-4.9%

Level - Nov' 2021 Projected level - No' 2026 Projected growth - 5 YR to Nov' 2026 %

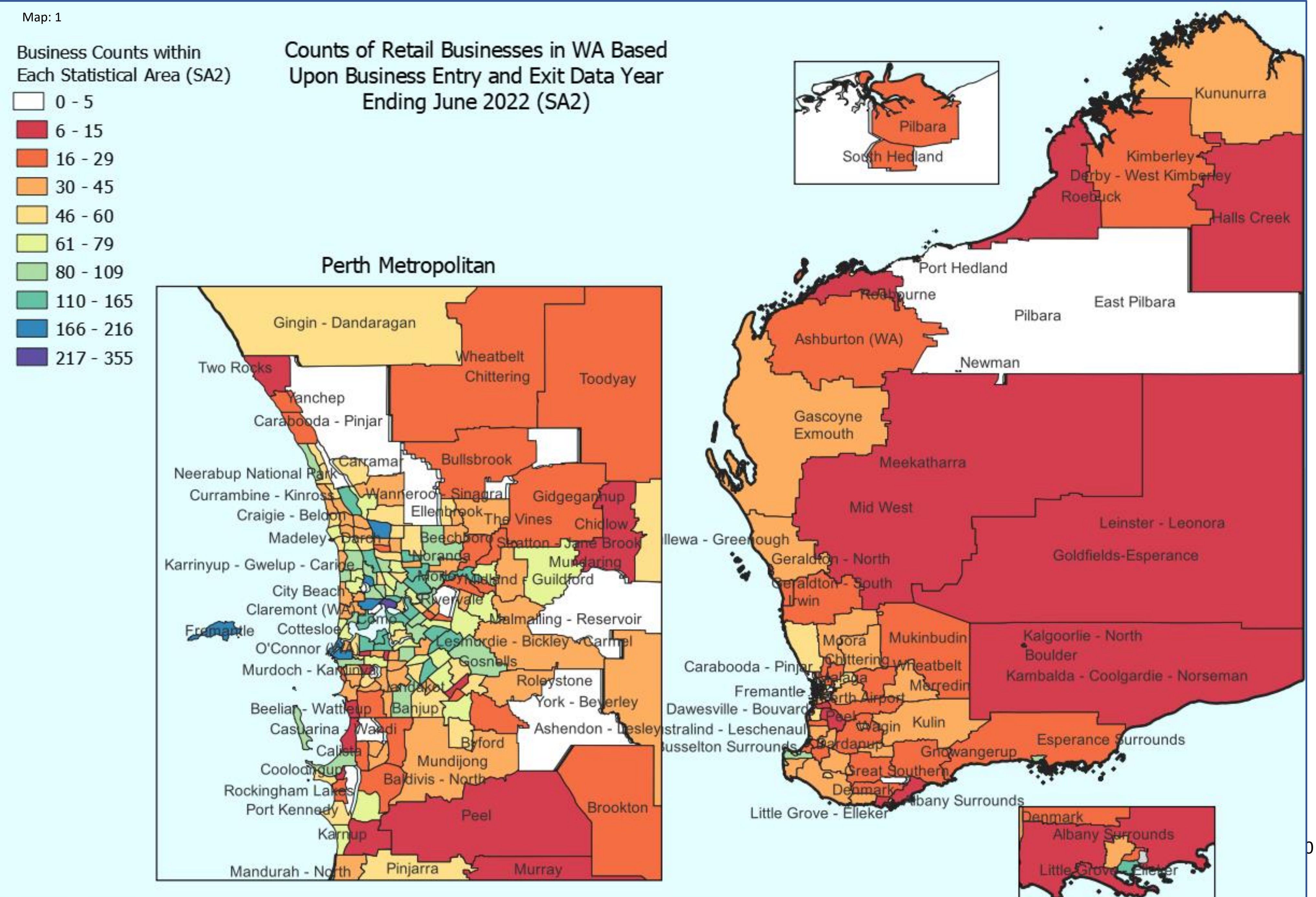
Graph 3 https://www.nationalskillscommission.gov.au/topics/employment-projections.

Graph 4 https://www.nationalskillscommission.gov.au/topics/employment-projections

Graph: 5



Graph 5 https://www.abs.gov.au/statistics/industry/retail-and-wholesale-trade/retail-trade-australia/latest-release



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