MTAA RESPONSE TO:

2025 Core Skills Occupation List (CSOL)

September 2025

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MOTOR TRADES ASSOCIATION OF AUSTRALIA

Executive summary

The Motor Trades Association of Australia (MTAA) appreciates the opportunity to provide feedback on the draft 2025 Occupational Shortage List.

MTAA acknowledges Jobs and Skills Australia (JSA) for recognising the persistent and critical shortages in skilled trades across the automotive sector, particularly among motor mechanics, panel beaters, vehicle painters, and related occupations. These trades are fundamental to the safe and reliable operation of Australia's transport network and underpin the productivity of industries and communities across the country.

Australia's automotive industry is one of the nation's largest and most essential sectors. Tens of thousands of small and medium-sized independent businesses collectively employ over 320,000 workers. These businesses are at the frontline of servicing, repairing, and maintaining the national vehicle fleet. Without sufficient skilled labour, the reliability and safety of this fleet, which underpins economic and social activity in every community, is at risk.

With the transition to electric vehicles (EVs), zero-emission vehicles (ZEVs), advanced driver assistance systems (ADAS), and increasingly complex vehicle technologies, the need for highly qualified automotive professionals is greater than ever before. Training pipelines have not kept pace with this rapid evolution, and workforce shortages are already creating bottlenecks in service delivery and higher costs for consumers and businesses.

MTAA therefore strongly supports the inclusion the following occupations on the shortage list and welcomes the recognition of the sector's critical workforce needs.

Occupation	ANZSCO Code	2025 Shortage List Status
Motor Mechanic (General)	321213	Shortage
Motorcycle Mechanic	321214	Shortage
Small Engine Mechanic	324111	Shortage
Panelbeater	324211	Shortage
Vehicle Body Builder	324212	Shortage
Vehicle Trimmer	324311	Shortage
Vehicle Painter	324311	Shortage
Automotive Electrician	321111	Shortage
Diesel Motor Mechanic	321212	Shortage

Additional occupations for consideration

MTAA submits that several other key automotive occupations should also be recognised as being in shortage.

We request that the following occupations be reclassified from "No Shortage" to "Shortage":

- Tow Truck Driver (ANZSCO 733115)
- Tyre Fitter (ANZCO 899415)
- Motor Vehicle Parts Interpreter / Automotive Parts Salesperson (ANZSCO 621312)

These roles are indispensable to the functioning of the wider motor trades ecosystem. Their exclusion does not reflect the reality experienced by employers across the country.

Evidence of shortages

The Deloitte report commissioned by MTAA and attached to this submission, draws on extensive national industry survey responses and highlights acute and persistent recruitment challenges across these three occupations. Employers consistently reported difficulty attracting qualified candidates, high turnover rates, and extended vacancies.

- Tow Truck Drivers: Workforce shortages have direct consequences for road safety, as stranded vehicles and accident sites remain unattended for longer. This increases risks for motorists, emergency services, and communities.
- Tyre Fitters: Essential to fleet maintenance, tyre fitters ensure vehicles remain safe and roadworthy. Shortages here directly affect both heavy transport and passenger vehicles, disrupting supply chains and mobility.
- Motor Vehicle Parts Interpreters / Automotive Parts Salespeople: This role is critical to ensuring repairers have timely access to the right components. Shortages cause delays, increase repair times, and undermine business productivity.

MTAA has received particularly strong and ongoing feedback from industry about shortages of Parts Interpreters, making this occupation a high-priority candidate for reclassification. Automotive industry surveying found a fill rate of 59% for metro areas and 50% for regions for example (refer Deloitte report).

Ongoing evidence and industry feedback

Since the Deloitte report was published, feedback from MTAA's members and industry partners confirms these shortages remain acute. Despite employers offering competitive wages and training, vacancies persist for months. These roles are increasingly filled by workers without the necessary skills or experience, which impacts quality and safety outcomes.

Broader policy implications

Accurate classification of shortages is critical to ensuring that migration, training, and workforce policies are fit for purpose. By excluding roles such as Tow Truck Drivers, Tyre Fitters, and Parts Interpreters from the shortage list, this risks:

- Limits the ability of businesses to access skilled migration pathways for urgently needed workers.
- Slowing the transition to new vehicle technologies, as businesses already face resource strain.
- Increasing safety and reliability risks across Australia's vehicle fleet.

Including these occupations in the updated Occupational Shortage List would align policy with on-the-ground industry experience and strengthen resilience across the transport and logistics system.

Conclusion

The CSOL is a critical policy instrument for shaping Australia's workforce and migration strategy. It must reflect the genuine labour market conditions faced by industry.

MTAA strongly supports the inclusion of motor mechanics, panel beaters, vehicle painters, and related core trades, and urges JSA to reconsider the "No Shortage" status of:

- Tow Truck Drivers
- Tyre Fitters
- Motor Vehicle Parts Interpreters / Automotive Parts Salespeople

Including these occupations will support the sustainability of the automotive sector, strengthen safety and reliability across the transport network, and ensure Australia remains prepared for the rapid transition to a low-emissions, technologically advanced fleet.

MTAA and its members are willing to provide further evidence, data, or direct industry engagement to assist JSA in its deliberations. We look forward to continuing collaboration to ensure Australia's workforce policy settings are responsive, resilient, and reflective of industry needs.

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MOTOR TRADES ASSOCIATION OF AUSTRALIA

Deloitte.

Automotive Skills Shortages

MTAA Core Skills Occupations List supporting analysis

31 May 2024

Deloitte Access Economics

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Executive summary

The purpose of this report is to inform the Motor Trades Association of Australia's (MTAA) response to Jobs and Skills Australia's (JSA) consultation on the Core Skills Occupations List (CSOL). The CSOL is a list containing occupations identified as being in shortage in Australia where migration is seen as an appropriate path to address the shortage. It is one of the criteria to be eligible for the Core Skills Pathway for the new Skills in Demand (SID) visa.

For an occupation to be considered for inclusion in the CSOL, a reasonable proportion of the market should be able to pay above the Temporary Skilled Migration Income Threshold (TSMIT). The TSMIT is currently set at $70,000 but is increasing to $73,150 from 1 July 2024. This report outlines the findings of analysis by Deloitte Access Economics to assess the share of full-time workers earning above the TSMIT threshold in a selection of automotive occupations.

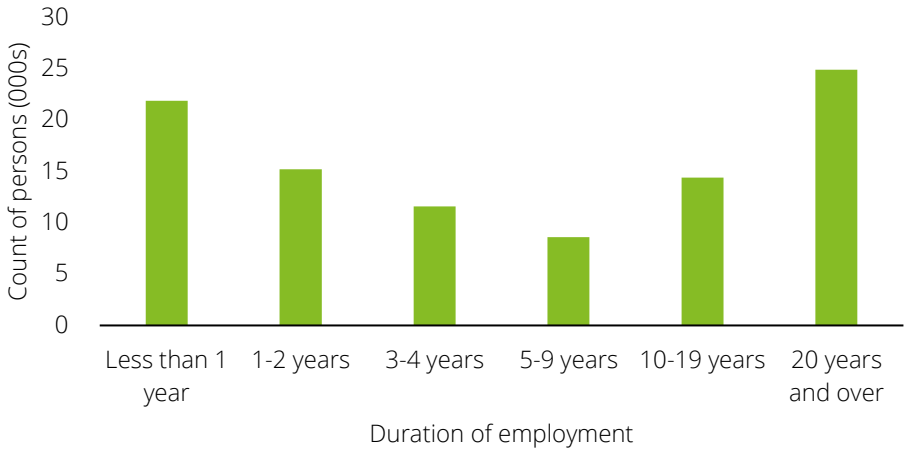
Table 1 shows the estimated share of full-time workers earning $73,150 or above for the nine specific occupations examined for this study. The analysis suggests that more than 30% of the market for full time workers pay above the TSMIT for eight of the nine occupations in scope for this study. Each occupation has a distribution of earnings. For this study we have selected 30% of an occupation as a reasonable earnings benchmark to compare against the TSMIT threshold.

Table 1: Estimated share of full time workers earning the TSMIT or above in 2024

ANZSCO Code	Occupation Title	Estimated share of FT employees earning TSMIT or above (2024)
321212	Diesel Motor Mechanic	58.4%
321111	Automotive Electrician	58.4%
324111	Panelbeater	52.6%
324311	Vehicle Painter	48.8%
321211	Motor Mechanic (General)	43.2%
324211	Vehicle Body Builder	41.0%
324212	Vehicle Trimmer	38.4%
321213	Motorcycle Mechanic	30.5%
321214	Small Engine Mechanic	26.5%

The duration of employment for automotive and engineering trade workers is varied. Most employees stay within their occupation for most of their career. However, a large share of employees also exit their occupation very quickly, within the first year.

Figure 1: Duration of employment in last job



This may reflect the relatively high earnings or working conditions in these occupations. Some workers may exit the occupation within their first year if the work does not align well with their skills or if they are otherwise dissatisfied with the job. Workers that are satisfied with the work are likely to stay in the occupation for an extended period due to relatively high wages and being in a rewarding occupation aligned with their skills.

The data analysis in this report has been supplemented with five case studies, providing voices from the industry on the remuneration, benefits and incentives offered by employers in the automotive industry for the nine identified occupations. The case studies also provide an understanding of the experiences of employers when recruiting domestically and internationally for these occupations.

Key insights provided by the case studies include that the automotive industry has been affected by a reduced supply of new workers, particularly since COVID-19 began, and this has created significant upward pressure on wages across the industry. Many employers are also struggling to hire local workers due to skills shortages and competition from other industries, particularly mining. Some employers point out that the pipeline of prospective workers is impacted by the perception that the automotive industry is low-paid and less desirable than other trades, such as building. As a result of the shortage of local workers, many employers are hiring international skilled workers and paying most of their migration expenses as well as some setup costs, although they note that the process for hiring these workers can be time-consuming. Employers have also found that competition for international workers is increasing due to the shortage of local workers.

1 Background

1.1 Project Background

The Migration Strategy released in December 2023 provides a roadmap for the future reform of Australia's migration system.[1] The Strategy outlines JSA's responsibility for labour market analysis and stakeholder engagement which will inform the Government's final decisions on the CSOL.

The purpose of the CSOL is to target the temporary skilled migration system to meet Australia's current and future workforce needs.[2] The CSOL identifies occupations that are in shortage in Australia where migration is seen as an appropriate path to address the shortage. The list also reflects occupations that the Government considers are required to fulfil Australia's obligations under international trade agreements.

Being on the CSOL is one of the criteria to be eligible for the Core Skills Pathway of the new SID visa.[3] This pathway is aimed at occupations of skill levels 1 to 3, where the salary paid is above the TSMIT at $73,150 (from 1 July 2024), and below the $135,000 threshold for the Specialist Skills Stream of the SID visa.[4]

To be included on the CSOL, there must be evidence that a reasonable share of the market for each occupation under consideration would pay the TSMIT or above.

The CSOL is currently under development with a draft list generated from the JSA Migration Labour Market Indicator Model.[5] The model divides occupations into three categories:

1) Confident on list: skilled occupations the JSA Migration Model is confident should be on the CSOL
2) Targeted for consultation: skilled occupations the JSA Migration Model suggests should be targeted for stakeholder feedback
3) Confident off list: skilled occupations the JSA Migration Model suggests should not be on the CSOL.

The MTAA has been approached by JSA as part of the stakeholder consultation process to provide feedback on the draft CSOL.

1.2 Purpose of report

This report informs the MTAA's response to JSA's consultation on the CSOL. In particular, the report examines evidence on income levels for the occupations in scope (see Table 2). This is achieved by considering the distribution of income for each occupation and the share of workers that earn above the TSMIT. The income distribution relates to current full time employees working within these occupations rather than from advertised salaries (for prospective employees).

The following occupations and corresponding ANZSCO codes are considered in scope for this report.

[1] Draft Core Skills Occupations List (CSOL) for Consultation, *Jobs and Skills Australia (2024).*
[2] Draft Core Skills Occupations List, *Jobs and Skills Australia (2024).*
[3] Core Skills Occupations List, *Immi Help (25 March 2024).*
[4] Migration Strategy Draft Core Skills Occupations List Released – Consultation Period is Open, *Ajuria Lawyers (25 March 2024).*
[5] Submission guidelines, *Jobs and Skills Australia (2024).*

Table 2: Occupations in scope

ANZSCO Code	Occupation Title	Classification under draft CSOL
321211	Motor Mechanic (General)	Targeted for consultation list
321213	Motorcycle Mechanic	Targeted for consultation list
321214	Small Engine Mechanic	Targeted for consultation list
324111	Panelbeater	Targeted for consultation list
324211	Vehicle Body Builder	Targeted for consultation list
324212	Vehicle Trimmer	Targeted for consultation list
324311	Vehicle Painter	Targeted for consultation list
321111	Automotive Electrician	Confident on list
321212	Diesel Motor Mechanic	Confident on list

2 Methodology

The primary source used for the analysis is data on total personal income (annual) obtained from the 2021 Census of Population and Housing.[6] Data was collected at the ANZSCO 6-digit level for the occupations in scope for this analysis. The data collected captures the income distribution (based on the count of employees in different annual income bands) for full time workers of skill level 1, 2 or 3 (holding a Certificate III or higher) in the selected occupations.

The Census data required some adjustments to reflect the current distribution of annual wage income in these occupations. These adjustments included:

- **Adjusting the data to reflect wage income only**: The Census data captures total income data rather than wage income. Total income may include non-labour income such as interest payments and capital gains. To extract wage income from total income, the Census income brackets were scaled down based on the Australian Tax Office's (ATO) Occupational Wage Data.[7] The ATO's data contains information on both the median wage income and the median total income for the occupations in scope. To obtain the scalar, an average ratio of median wage income to median total income across the occupations in scope was calculated.

- **Uplifting the data to reflect wage growth since 2021**: The Census data reflects the distribution of income in 2021. To account for wage growth since 2021, the income brackets were firstly scaled up based on the Australian Bureau of Statistics (ABS) Employee Earnings data.[8] The ABS data contains information on growth in median weekly earnings by 2-digit ANZSCO group. To obtain the scalar, growth in median earnings for the ANZSCO 2-digit occupation group 'Automotive and Engineering Trades Workers' was calculated between August 2021 and August 2023 (the most recent data point). The occupations in scope for this study comprise 39% of total full-time employees in this 2-digit ANZSCO group (see table below). To obtain current earnings for 2024, wages were scaled further by Wage Price Index (WPI) growth between June 2023 and March 2024. To estimate earnings for mid-2024 when the TSMIT will increase, wages were further scaled by forecast WPI growth between March 2024 and June 2024 from Deloitte Access Economics' Business Outlook.

Table 3: Occupation shares under 'Automotive and Engineering Trades Workers'

Occupation Title	Number of workers	Share of 'Automotive and Engineering Trades Workers'
Motor Mechanic (General)	63,446	24.5%
Panelbeater	8,116	3.2%
Vehicle Painter	7,288	2.9%
Automotive Electrician	6,919	2.7%
Diesel Motor Mechanic	6,553	2.6%
Vehicle Body Builder	3,322	1.3%
Motorcycle Mechanic	1,522	0.6%
Small Engine Mechanic	1,330	0.5%
Vehicle Trimmer	922	0.4%
Total: Occupations in scope	99,418	39.0%
Total: Automotive and Engineering Trades Workers	254,644	

[6] The 2021 Census of Population and Housing, *Australian Bureau of Statistics (2021).*
[7] Taxation Statistics 2020-21 - Individuals – Table 15, *Australian Tax Office (2021).*
[8] Employee Earnings, *Australian Bureau of Statistics (13 December 2023).*

These steps generated a distribution of annual wage income for full time employees in each occupation in scope for this analysis. This distribution places employees in income bands which reflect 2024 annual wage income.

Data on the duration of employment was obtained from the Participation, Job Search and Mobility survey. Workers were filtered based on their last job being in the Automotive and Engineering Trade Workers group. The most recent data was for 2021.

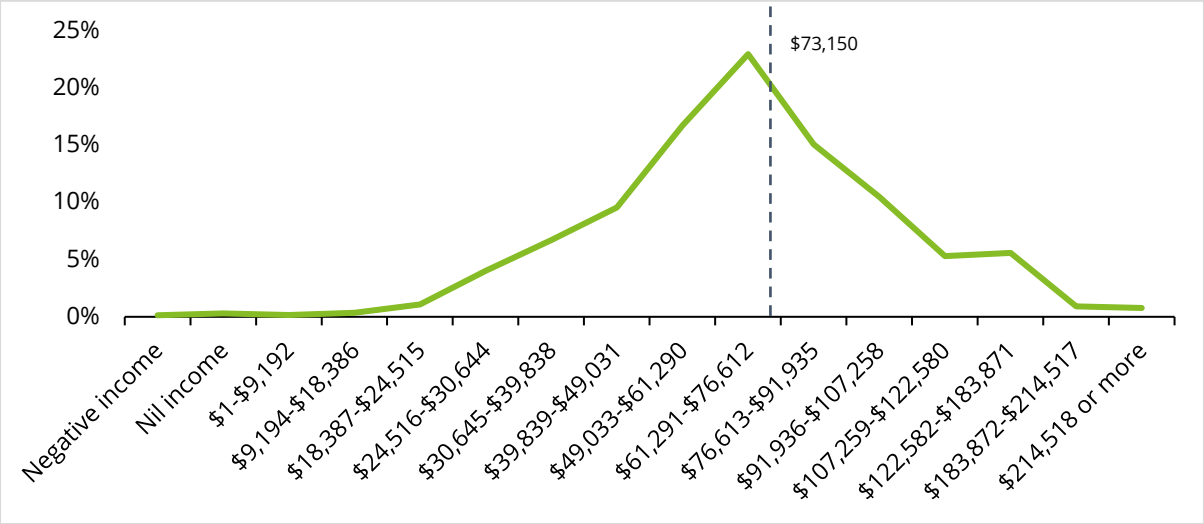
Five case studies were also undertaken to supplement the quantitative data analysis. Four of the case studies profile the views of employers, and one case study outlines the perspectives of an independent industry expert. The case studies provide voices from the automotive industry and offer a more nuanced understanding of the remuneration and benefits provided by employers for the occupations in scope for this research. The case studies also detail employers' experiences recruiting domestically and internationally for the identified occupations.

Case study participants were identified by MTAA, and contact details were provided to Deloitte Access Economics to conduct interviews to inform the case studies. The five contacts were engaged by Deloitte Access Economics by email or phone and provided with information about the nature and objectives of the research, as well as privacy protocols prior to being interviewed. Once the contacts had gained this understanding of the research and provided consent to participate, they were interviewed by phone by Deloitte Access Economics.

3 Wage income estimates

3.1 Motor Mechanic (General)

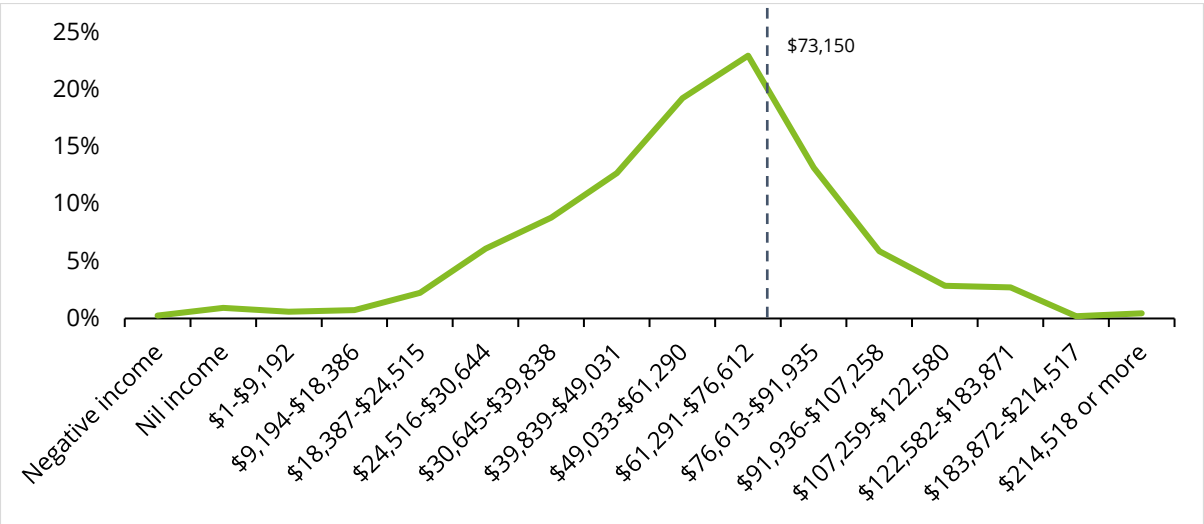
Figure 3.1: Occupation wage distribution



Considering the TSMIT threshold, it is estimated that 43.2% of workers in Motor Mechanic (General) earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.1.

3.2 Motorcycle Mechanic

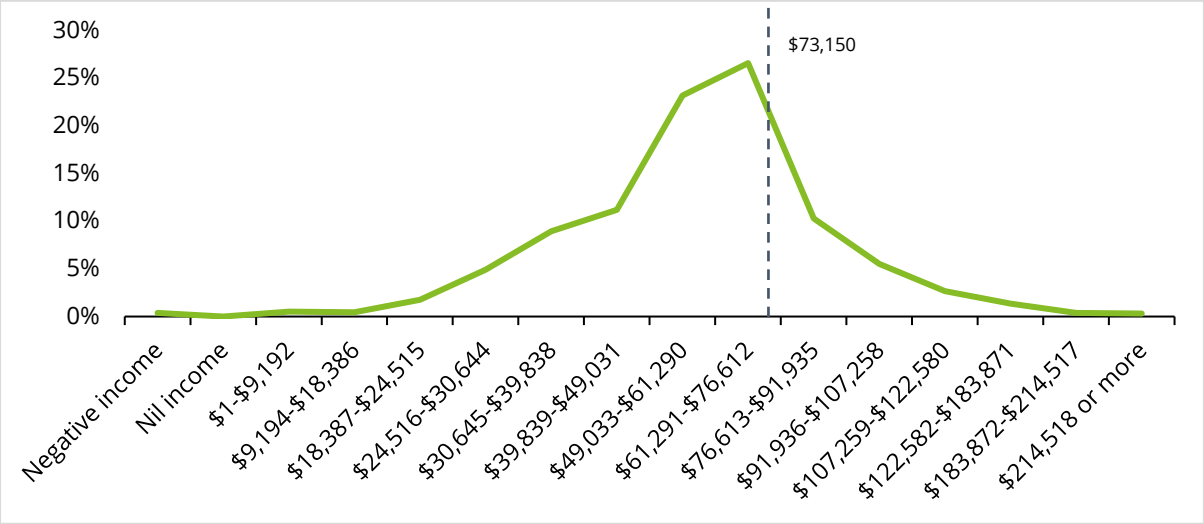
Figure 3.2: Occupation wage distribution



Considering the TSMIT threshold, it is estimated that 30.5% of workers in Motorcycle Mechanic earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.2.

3.3 Small Engine Mechanic

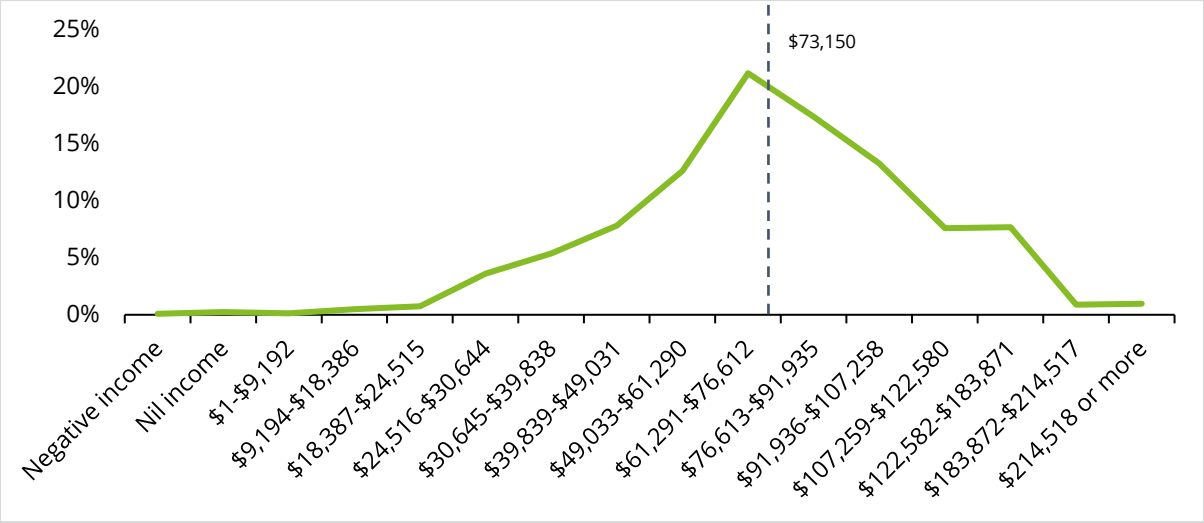
Figure 3.3: Occupation wage distribution



Considering the TSMIT threshold, it is estimated that 26.5% of workers in Small Engine Mechanic earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.3.

3.4 Panelbeater

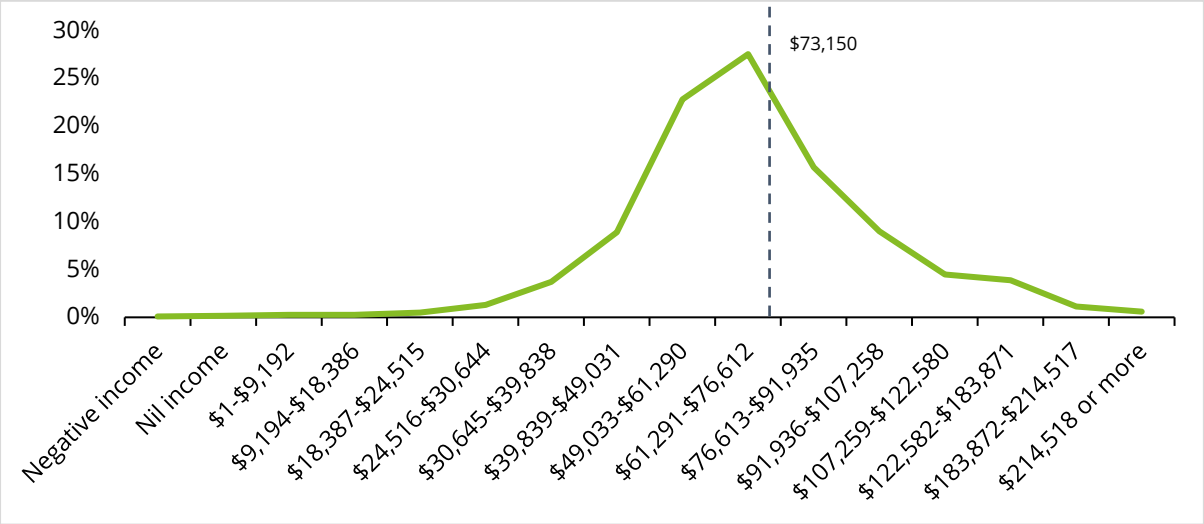
Figure 3.4: Occupation wage distribution



Considering the TSMIT threshold, it is estimated that 52.6% of workers in Panelbeater earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.4.

3.5 Vehicle Body Builder

Figure 3.5: Occupation wage distribution



Considering the TSMIT threshold, it is estimated that 41.0% of workers in Vehicle Body Builder earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.5.

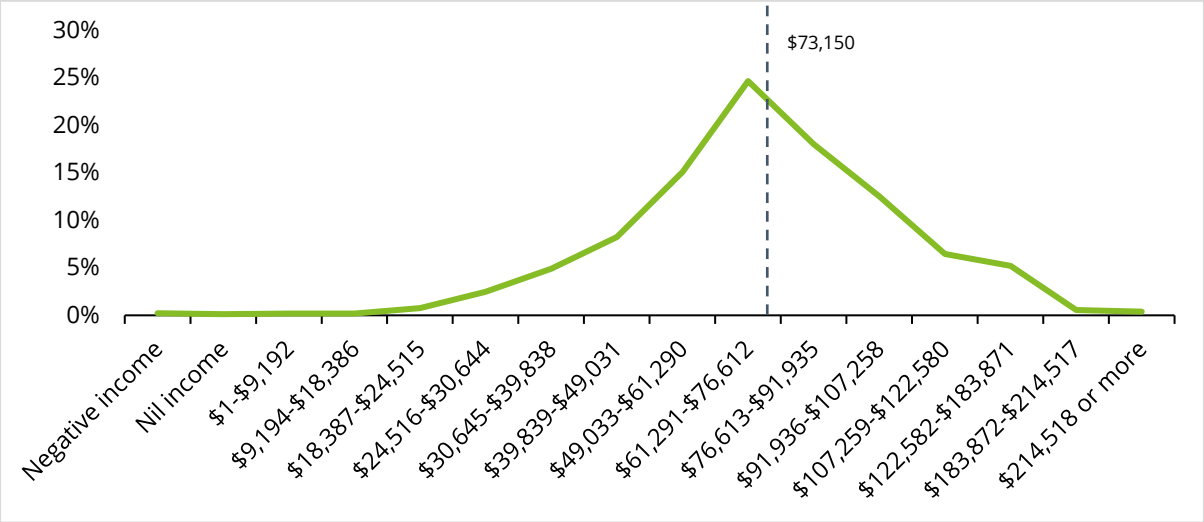
3.6 Vehicle Trimmer

Figure 3.6: Occupation wage distribution

Considering the TSMIT threshold, it is estimated that 38.4% of workers in Vehicle Trimmer earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.6.

3.7 Vehicle Painter

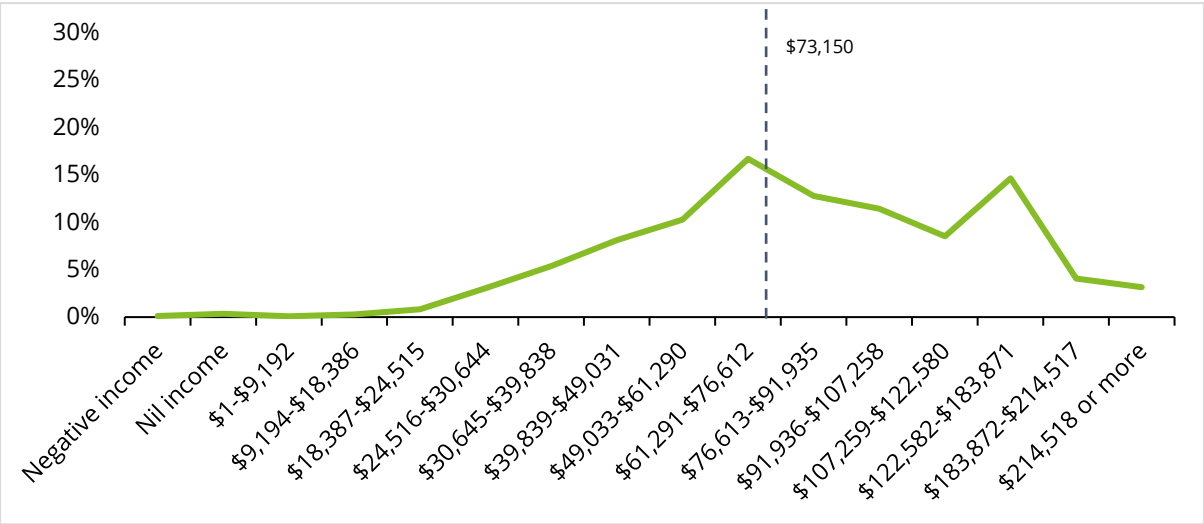
Figure 3.7: Occupation wage distribution



Considering the TSMIT threshold, it is estimated that 48.8% of workers in Vehicle Painter earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.7.

3.8 Automotive Electrician

Figure 3.8: Occupation wage distribution



Considering the TSMIT threshold, it is estimated that 58.4% of workers in Automotive Electrician earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.8.

3.9 Diesel Motor Mechanic

Figure 3.9: Occupation wage distribution

Considering the TSMIT threshold, it is estimated that 58.4% of workers in Diesel Motor Mechanic earn $73,150 or above. This assumes that individuals are evenly distributed within the wage brackets presented in Figure 3.9.

4 Case studies

To provide the voice of the industry, we have undertaken five phone interviews with automotive industry stakeholders and summarised the key insights from each case study. The case studies are comprised of one independent industry expert based out of New South Wales and four industry employers across Victoria, South Australia, Tasmania, and Western Australia. The insights provided by all five stakeholders were consistent across the topics of the remuneration of workers, hiring from the domestic labour market and hiring international skilled workers. The key findings from all five case studies are summarised in Figure 4.1 Summary of key findings from the case studies below.

Figure 4.1 Summary of key findings from the case studies

Remuneration of workers

1. Impact of COVID-19: The significant impact of COVID-19 on remuneration on the industry was evident, with a reduced supply of workers leading to increased wages.
2. Variation in remuneration: Remuneration varies based on role type, skill level, experience, and worker availability.
3. Use of industry standards: Some employers use the Award to determine wages and pay above the Award to attract and retain workers.
4. Additional incentives: Employers offer bonuses and benefits such as fuel cards and cars to attract and retain workers.
5. Wage increases: All employers have increased wages over the past few years with some having implemented regular pay rises, bonuses or have increased wages by a certain percentage.

Hiring from the domestic labour market

1. Difficulty in hiring: Employers experience difficulty hiring local workers across the industry.
2. Skill shortages: Many occupations are hard to fill with local workers due to factors such as competition from other industries and long working hours, with some employers offering 4-day weeks to address this.
3. Industry incentives: The industry offers incentives to attract and retain workers, such as sign-on bonuses or providing top technicians with additional benefits such as cars.
4. Perception challenges: Some view the industry as poorly paid and less desirable than other trades.
5. Success in local recruitment: One employer had success in hiring locally, which they attributed to offering higher pay than other businesses.

Hiring international skilled workers

1. Covering immigration costs: Employers cover most expenses related to migration, including some startup costs, to alleviate the financial burden on workers.
2. Competition for skilled workers: Competition for skilled international workers has recently increased, making it possible for some employees to find better offers from other businesses.
3. Lengthy migration process: The process for hiring an international skilled worker is time-consuming.
4. Brand-specific recruitment: Some employers recruit international skilled workers from specific networks or brands.
5. Long-term investment: One employer pointed out that sponsoring international skilled workers is a long-term investment, with upfront costs evening out over time.

Source: Deloitte Access Economics

Case study 1: Industry expert in metropolitan New South Wales (NSW)

This case study presents the insights and perspectives of an automotive industry expert based in metropolitan NSW. The expert provides observations on changes in remuneration within the automotive industry, as well as hiring domestic and international skilled workers.

The occupations referred to in this case study are Motor Mechanic (General), Panelbeater, Vehicle Painter, Automotive Electrician, and Diesel Motor Mechanic.

Remuneration of workers

The automotive industry has seen significant changes in wages in recent years. Wage growth was minimal from 2010 to 2019, while international migration remained constant. However, the emergence of COVID-19 had a profound impact on industry wages. Many people left the industry, leading to a reduced supply of workers and higher wages. Employers have been gradually increasing wages to stay competitive. In some states, however, such as Western Australia, the wage growth hasn't been enough to offset the loss of workers to the mining industry.

Remuneration varies depending on the type of role and the availability of workers. Diesel Motor Mechanics, for instance, receive higher salaries due to their responsibility for maintaining trucks. Employers are willing to pay more for these roles given the critical nature of keeping road transport vehicles operational.

Similarly, panel beaters, who were referred to as a “dying breed [who] can name their price,” can command higher salaries due to their scarcity. Experience and training also factor into the remuneration of workers in the industry.

Hiring from the domestic labour market

According to the industry expert, hiring for occupations in the domestic labour market is "extremely difficult." The expert highlighted that traditional methods of advertising roles are often ineffective, with hiring decisions relying heavily on personal relationships and word of mouth.

Furthermore, certain roles, such as panel beaters and vehicle painters, are particularly challenging and costly to fill due to their high remuneration offered by employers to compensate for their scarcity.

Hiring in the domestic labour market is very challenging, with recruitment relying on word of mouth rather than the traditional method of advertising for roles.

Hiring international skilled workers

The industry expert reported a decline in sponsorship for international skilled workers since the onset of COVID-19 as competition for these workers has increased internationally.

An estimated 90% of employers who sponsor international workers cover expenses such as flights, initial accommodation, skills assessment fees, and visa application fees, therefore alleviating any financial burden on the worker.

This is critical as most skilled workers come from South East Asia, with the Philippines being the largest market, followed by Sri Lanka. Due in part to the exchange rate, it would be prohibitively expensive for these workers to fund their own visa application fees.

The coverage of all costs has become even more critical since the pandemic, as increased competition for skilled international workers means that applicants can find alternative businesses willing to cover these migration expenses.

Case study 2: Employer at car dealership in metropolitan Victoria

This case study presents the views of employer at a large car dealership in metropolitan Victoria employing 100 workers. The employer provides insights on the varying remuneration packages offered by employers and difficulties with the recruitment of both local and international skilled workers.

The occupations referred to in this case study are Motor Mechanic (General), Automotive Electrician, and Diesel Motor Mechanic.

Remuneration of workers

This employer outlined the different salaries they offer to different workers, with remuneration mostly based on skill level.

Most of their technicians are earning at least $1,100 a week ($57,200 annually), excluding super, higher than the basic wage for a technician which is $900 per week. This wage varies based on experience and time they have spent with the company.

The employer supplies all their clothing and provides tool allowances, which is part of the Award. The top wage for their employees is $1,600 per week, with a monthly bonus which varies from $500-1000 per month.

Overall, the wages of their employees have increased over the previous few years. For example, less than two months ago, their employees received a pay rise of $50-100 per week, although there is no yearly CPI increase.

Hiring from the domestic labour market

The employer referred to their ability to hire for their relevant occupations from the local labour force as "horrible", noting that "there's no one there… there's no uptake when you hire locally." Technicians, particularly motor mechanics, and apprentices were highlighted as the hardest workers to find from the local workforce.

The employer noted that the hours worked contributed to making it hard to attract workers, although they have had some success in offering more flexibility to workers. They stated that while the workers are well paid, working long hours is challenging. The employer therefore turned their roles into a 9-day fortnight, something that they have found is more appealing to their employees.

A recent industry trend in remuneration the employer noted is manufacturers contributing to the wages of master technicians. For example, GM Australia and New Zealand have proposed contributing $2,000 per quarter to workers at the master technician level to support worker retention, while Volkswagen and Audi provide top technicians with a car.

Hiring international skilled workers

This employer has sponsored international motor mechanics and currently has eight workers on visas. The process of hiring international skilled workers is not a quick fix, however, as it is time consuming and can take months for the worker to arrive in Australia. This employer referred to the government migration process as the "biggest hurdle."

They have employed skilled workers from the Philippines and paid for all of the Australian government fees, including visa fees, for these workers. More recently, the employer has paid half of the visa fees for secondary applicants who are family members of the worker.

"They get paid pretty well, but the lifestyle mix is hard, working from 7:30am-6pm. I turned their roles into a 9-day fortnight, which has worked quite well to make that role more enticing."

Case study 3: Employer at truck dealership in metropolitan South Australia

This case study presents the views of an employer at a trucker dealership in metropolitan South Australia employing 110 workers. The employer provides observations on the change in industry remuneration since COVID-19, as well as their experiences hiring domestic and international skilled workers.

The occupations referred to in this case study are Motor Mechanic (General) and Diesel Motor Mechanic.

Remuneration of workers

This employer uses the Award as a guide for employees' wages, although pays above the Award rate. Across their mechanic occupations, the weekly base salary is just over $1,500 per week ($79,500 annually), excluding super. The employer also provides a meal allowance and tools allowance, as per the Award.

In terms of other incentives, the employer offers overtime, clothing, Christmas parties and bonuses that are not performance-based.

Since COVID-19, the hourly rate paid to employees has increased at an annualised rate of 8-9%. This strong growth is due to industry demand and because workers' skillsets are closely aligned with the mining industry, resulting in significant competition between the two industries. To make their workplace more appealing than competitors for workers, the employer also focuses on providing a modern and clean work environment.

The employer has noticed that over the past few years, some employers are offering flat wages of $50 per hour, without overtime.

Hiring from the domestic labour market

The employer has had success with local recruitment over the past few years, particularly for Motor Mechanic (General) roles stating, "if we lose one, we can get one." The employer has also had success in hiring apprentices and has been hiring 8 apprentices per year.

Diesel Motor Mechanics are the most challenging occupation to recruit for because the mines pay a significantly higher rate ($50 per hour compared to $38 per hour for this dealership).

For this employer, Motor Mechanics (General) are easier to hire because their business offers a higher rate than a typical car dealership ($38 per hour compared to $34 per hour).

"Some of our customers who run workshops will offer a flat wage, so that might be $50 an hour. That might sound good, but that's flat, so you don't get overtime, you just get $50 for every hour you work… that flat spend has been more dominant since COVID."

Hiring international skilled workers

This employer has sponsored international skilled workers as Diesel Motor Mechanics.

Currently, their business employs nine workers on visas. Eight of these international skilled workers are on Temporary Skill Shortage (TSS) visas (subclass 482), allowing sponsorship for up to four years, and one is on an Employer Nomination Scheme (ENS) visa (subclass 182).

The employer covers all expenses for the international skilled worker to migrate to Australia. They also pay for the workers' accommodation and furnish this for one year, after which the worker can take over the lease.

The employer estimates that it costs their business about $25,000 in total per employee who migrates. They view this as a longer-term investment, calculating that this adds almost $2 per hour more than a local worker over the four years the TSS visa worker is sponsored.

The international skilled workers hired by the employer have all previously worked with a specific brand of truck overseas and are recruited from the same brand of truck's international network.

Case study 4: Employer at multiple mechanic businesses in metropolitan and regional Tasmania

This case study provides insights from a mechanic employer with stores in metropolitan and regional Tasmania with 53 employees. The employer notes significant change in industry remuneration since COVID-19, as well as their experiences and views on hiring domestic and international skilled workers.

The occupations referred to in this case study are Motor Mechanic (General) and Automotive Electrician.

Remuneration of workers

The employer currently offers their fully qualified workers an annual salary of between $70,000- $100,000, excluding super. All workers who were paid wages below $70,000 had their wages increased when the Temporary Skilled Migration Income Threshold (TSMIT) was raised from $53,900 to $70,000 on 1 July 2023.

Depending on a worker's role and skill level, they receive additional benefits, such as fuel cards and a car.

Since COVID-19, the employer has changed their remuneration for their employees due to skill shortages. They have noticed if they don't incentivise their workers, they tend to move on to other roles. In this time, the wages in their business have increased 35%.

The employer has noticed other mechanic businesses have also been offering increased wages and benefits to their workers over the previous few years, including offering compressed four-day work weeks.

There are no differences in the remuneration the employer provides to workers in its metropolitan compared to regional stores.

Hiring from the domestic labour market

The employer referred to hiring from the domestic labour market as "impossible". Prior to COVID-19, the business was able to find workers from the local area or interstate.

In response to difficulties hiring local workers, the business has hired international workers and trained more apprentices. However, they noted there are fewer apprentices than previously due to more young people going to university and the automotive industry having a "perception problem" and being viewed as poorly paid and less desirable than building trades.

Another challenge when hiring apprentices is finding individuals who are passionate about the automotive industry and can keep up with the growing focus on programming and diagnostics in the industry.

The business' decision to increase benefits and wages relates to supply and demand. The employer said, "we pay what we need to for the right people with the right skills. Those that are more heavily skilled obviously we pay more to, and give them incentives like fuel or cars."

Hiring international skilled workers

Since 2006, the employer has been actively recruiting international skilled workers. More recently, they have significantly increased their hiring of these international workers, with four employed over the last 18 months.

As a sponsoring business, they pay what is required to support the migration of international skilled workers. This includes organising a toolbox they can pay off over time, a vehicle, and accommodation.

The employer noted that the process of hiring international skilled labour is challenging and expensive, and for these reasons can be prohibitive for businesses.

The employer suggests that the migration process should be streamlined and made more cost effective to alleviate the financial burden of sponsoring international skilled workers on businesses.

Case study 5: Employer at automotive retailer in metropolitan Western Australia

This case study offers insights from an automotive retailer employer with stores across metropolitan Western Australia and 1,250 employees. The employer highlights the strong increase in industry remuneration since COVID-19, as well as their challenges hiring domestic workers and international skilled workers.

The occupations referred to in this case study are Motor Mechanic (General), Vehicle Painter and Diesel Motor Mechanic.

Remuneration of workers

The remuneration for Motor Mechanics (General), Vehicle Painters, and Diesel Motor Mechanics varies. Motor Mechanics (General) earn an annual salary of $65,000-$75,000 (excluding super), while Vehicle Painters and Diesel Motor Mechanics earn $85,000-$105,000 annually.

All three occupations receive bonuses based on meeting key performance indicators (KPIs).

The higher salary of Vehicle Painters and Diesel Motor Mechanics is driven by the scarcity of these workers, with the employer noting it is "very, very difficult to come by qualified individuals with experience in those two fields."

Competition from the mining industry contributes to the scarcity of Diesel Motor Mechanics, as they offer higher pay. To address this, the employer has introduced sign-on bonuses for this occupation.

Wage growth has increased since COVID-19, increasing at an annualised rate of more than 10%, a trend the employer expects to continue over the next few years. This has led to restructuring and reduced wages and personnel in other areas of their business.

Hiring from the domestic labour market

The employer noted that it is "exceptionally challenging" to employ workers from the domestic labour market and they expect this challenge to continue.

The business relies on word of mouth from current employees to recruit local workers. Employees are offered a referral bonus for this. The employer notes, however, they have had limited success with the referral program and other initiatives they have tried, stating that "nothing that we've done so far has been the solution."

The strong increase in wages has led to changes in people management in their business: "It's meant that management of our people resources has become more critical than ever... Getting more productivity out of the individuals we do have is more critical than ever. So that's meant really close management of people's capability, development of people, that kind of thing has become more important than ever."

Hiring international skilled workers

The employer has sponsored international workers for Motor Mechanics and Diesel Motor Mechanics, but not for Vehicle Painters.

Diesel Motor Mechanics are harder to recruit for internationally due to competition from countries like Japan and the United Arab Emirates (UAE), which offer higher pay.

The employer provides front-end support for international workers, including paying visa fees, document translation fees, VET ASSESS fees, and providing set-up costs such as tools and accommodation for 4-6 weeks.

Historically, international workers were paid less than locals due to having lower skills and less experience. The TSMIT increase, however, has led to higher pay for all international workers. As a result, the employer is more selective in hiring overseas Motor Mechanics, although their approach to hiring Diesel Motor Mechanics remains the same.

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Appendix A:

MTAA's submission to JSA's Priority Skills List consultation

Deloitte.

Skills shortages in the Australian automotive industry

MTAA member survey findings 2024

1 March 2024

Deloitte Access Economics

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Executive summary

The Motor Trades Association of Australia (MTAA) has partnered with Deloitte Access Economics to prepare their response to Job and Skills Australia's (JSA) 2024 Skills Priority List stakeholder survey. This report has been produced by Deloitte Access Economics for MTAA for the purpose of supporting this response. The report provides a summary of the findings from a cross industry survey of MTAA members conducted by Deloitte Access Economics, ensuring that the insights provided to JSA are data-driven and evidence-based.

Australia is experiencing a tight labour market with evidence of extensive skills shortages across many occupations. The latest JSA Skills Priority List showed that 36% of occupations across Australia were in shortage in 2023, five percentage points higher than the equivalent figure in 2022.

Skills shortages are a particular issue for the automotive industry. Of the 26 six-digit ANZSCO occupations that are most prominent in the automotive industry, 35% were assessed to be in shortage by JSA in 2023. A range of recent studies indicate that skills shortages are amongst the biggest challenges facing automotive businesses.

The automotive industry in Australia covers a wide range of business activities with diverse skills needs. To reflect this, and meet the JSA's requirements, Deloitte Access Economics conducted a survey of MTAA members to provide on-the-ground insights into how skills shortages are impacting the automotive industry. The survey was completed by over 500 automotive businesses from across Australia, representing over 2% of industry employment.

We find that there are acute skills shortages across the industry. Amongst the businesses responding to the survey, over 2,000 vacancies were advertised in 2023 of which less than 800 were filled, with an average industry fill rate of just 39% - well below JSA's threshold for determining if an occupation is in shortage. Shortages were prevalent across all states and territories, and in general were worse in regional locations compared to metropolitan regions.

Most automotive occupations were found to be in shortage, with fill rates particularly low for technician and trade workers. When comparing the survey findings to the 2023 JSA Skills Priority List (SPL) ratings it is found that:

- **Four occupations currently assessed as not in shortage by JSA were found to have fill rates below 67%**: tow truck drivers, tyre fitters, sales representatives (motor vehicle parts and accessories), and motor vehicle parts interpreters / automotive parts salespersons.
- **Two occupations currently not rated in the SPL owing to their skill level were found to be hard to recruit:** Materials recyclers (automotive dismantlers) and car detailers had low fill rates of 27% and 57% respectively.
- **Three emerging or other occupations relevant to the industry were also found to be in shortage:** The fill rate for the important emerging occupation of electric vehicle technician was 41%. Meanwhile the fill rates for apprentice mechanics and office support workers were 63% and 38% respectively.

The key reason highlighted for not filling vacancies was low numbers of applicants per vacancy. On average, automotive businesses received 8.2 applicants per vacancy, well below the national average of 17.7.

While low numbers of applicants were the diagnosis, many symptoms were identified by employers to be driving these issues. These included a lack of skilled / qualified workers, issues with the industry training pipeline, challenges around visas, remuneration concerns and competition from other industries, with many businesses calling for a greater focus from government on tackling the chronic lack of support for technician and trade professions in Australia.

Deloitte Access Economics

1 Background

1.1 Purpose

The Motor Trades Association of Australia (MTAA) has partnered with Deloitte Access Economics to prepare their response to Job and Skills Australia's (JSA) 2024 Skills Priority List stakeholder survey. This report will support the MTAA to provide a data-driven and evidence-based response to JSA's stakeholder survey, informing the Current Labour Market Rating component of the Skills Priority List. The report provides a comprehensive analysis of a Deloitte Access Economics survey of MTAA members, focusing on key insights about current labour shortages across the industry nationally and, where data has permitted, by state.

The Skills Priority List is released annually and is used as a point-in-time assessment to understand current skills shortages[1] and future labour demand in industries across Australia. It is based on data from a range of sources including economic data, employer surveys and stakeholder engagement. It is a key resource used to shape domestic education and training policy and informs Australia's Migration Program planning.

1.2 Defining the automotive industry

The automotive industry in Australia covers a wide range of business activities and has diverse skill needs. The industry's activities span across a range of codes under the Australian and New Zealand Standard Industrial Classification (ANZSIC) and the Australian and New Zealand Standard Classification of Occupations (ANZSCO).

Relevant sub-industries

For this report the automotive industry is defined as the seven ANZSIC sub-industries listed in Table 1. This definition was informed by consultation with MTAA, analysis of the ANZSIC industry classifications and a broader review of available literature. The seven sub-industries included in the definition comprise 93% of the industry's business population, as per data from the previous MTAA study.[2]

[1] JSA defines an occupation as in shortage when employers find it challenging to fill or are unable to fill vacancies or are unable to meet significant specialist skill needs within that occupation. This may be influenced by current remuneration, working conditions and accessibility of job locations (JSA, 2023).
[2] Motor Trades Association of Australia, 2021.

Table 1 Australian automotive industry: report definition

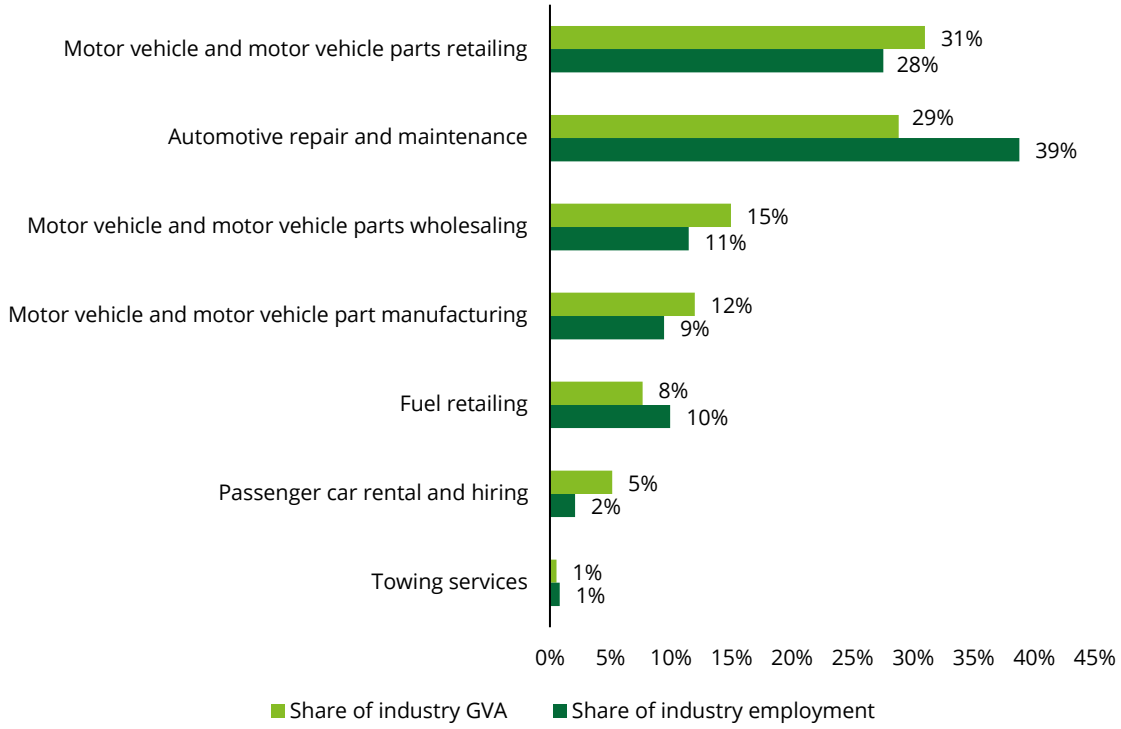
ANZSIC	Sub-industry	Main activities	Key relevant ANZSCO codes (occupation)
391, 392	Motor vehicle and motor vehicle parts retailing	New and used car, motorcycle, truck, trailer and other motor vehicle retail sales. Original equipment and aftermarket retail sales of motor vehicle parts and tyres.	149212 Customer Service Manager* 621311 Motor Vehicle or Caravan Salesperson* 621312 Motor Vehicle Parts Interpreter / Automotive Parts Salesperson* 611313 Sales Representative (Motor Vehicle Parts and Accessories) 811111 Car Detailer
941	Automotive repair and maintenance	Light and heavy vehicle mechanical service and repair; vehicle body, paint and interior repair; engine reconditioning; automotive electrical services; mining machinery service and repair; mobile plant and equipment service and repair.	149212 Customer Service Manager* 321111 Automotive Electrician 321211 Motor Mechanic (General) 321212 Diesel Motor Mechanic 321213 Motorcycle Mechanic 321214 Small Engine Mechanic 324111 Panelbeater 324211 Vehicle Body Builder* 324212 Vehicle Trimmer 324311 Vehicle Painter 899411 Motor Vehicle Parts and Accessories Fitter (General) 899412 Autoglazier 899413 Exhaust and Muffler Repairer 899414 Radiator Repairer 899415 Tyre Fitter
350	Motor vehicle and parts wholesaling	Car, commercial vehicle, trailer and other motor vehicle wholesale sales; motor vehicle dismantling, recycling and parts wholesaling.	621311 Motor Vehicle or Caravan Salesperson* 621312 Motor Vehicle Parts Interpreter / Automotive Parts Salesperson* 621911 Materials Recycler (automotive dismantler)
400	Fuel retailing	Retailing of petrol, diesel, liquefied petroleum gas (LPG), compressed natural gas (CNG), oils and service station operation.	621611 Service Station Attendant 631111 Checkout Operator
231	Motor vehicle and motor vehicle parts manufacturing	Specialist vehicle manufacturing; bus and truck manufacturing; vehicle body and trailer manufacturing; automotive electrical components and other vehicle parts manufacturing.	324211 Vehicle Body Builder*
461	Towing services	Accident, trade, heavy vehicle and other towing services.	733115 Tow Truck Driver
661	Passenger car rental and hiring	Hiring, leasing or renting of passenger cars without drivers.	149111 Fleet Manager 149413 Transport Company Manager 621912 Rental Salesperson

Source: Deloitte Access Economics *These ANZSCOs are duplicates because these occupations fall into multiple sub-industries.

Based on this definition **the automotive industry contributed $45.9 billion[3], or 2.1% of total industry output, to the Australian economy in 2021-22**. The **industry employed 392,000 workers in 2021-22** – approximately 2.9% of total employment in Australia.

The largest two sub-industries are motor vehicle and motor vehicle parts retailing, and automotive repair and maintenance, which together accounted 60% of industry output in 2021-22 and 66% of employment. Other smaller services such as manufacturing, wholesaling, fuel retailing, towing and passenger car rental and hiring, also form part of the industry.

Figure 1: Sub-industry shares of automotive GVA and employment, 2021-22



Source: Deloitte Access Economics

Adjusting for inflation, the automotive industry grew at an average annual rate of 2.6% between 2018-19 and 2021-22, exceeding the economy average of 1.5%. The fastest growing sub-industries over this period have been motor vehicle and motor vehicle parts retailing, and motor vehicle and motor vehicle parts manufacturing. In contrast, fuel retailing and motor vehicle and parts wholesaling have declined in real terms over the same period.

Relevant occupations

Our literature review identified 26 ANZSCO occupations directly relevant to the automotive industry, as outlined in Table 1. Some of these occupations operate across more than one sub-industry.

The five occupations with the greatest number of workers in the automotive industry in Australia in 2023 were:

- Motor mechanic (general), with 79,300 workers.
- Motor vehicle parts interpreter / automotive parts salesperson, with 17,600 workers
- Motor vehicle or caravan salesperson, with 14,500 workers
- Service station attendant, with 13,200 workers, and
- Automotive electrician, with 10,800 workers.[4]

[3] Measured in Gross Value Added (GVA) terms

[4] ABS, Labour Force Survey, Detailed, November 2023, Jobs and Skills Australia (JSA) trend data.

In addition to these 26 core occupations, our survey of MTAA members highlighted two additional occupations that are relevant to automotive businesses, but which have been treated separately for different reasons.

a) **Apprentice mechanics**: many businesses reported that they employed apprentice mechanics, often due to an inability to find and attract suitably qualified staff in this area. Apprentice mechanics have been treated as a separate occupation to general mechanics in this report to account for the substantively different skill level of this group.
b) **Office support workers**: several automotive businesses reported on recruitment activities associated with filling office support positions (e.g., receptionists, administration staff). These roles would fall across occupations in the Clerical and Administrative Workers ANZSCO major group and have been grouped together in the results section of this report.

Emerging occupations
Activities related to electric vehicles (EVs) currently fall under ANZSCO codes such as automotive electrician (ANZSCO code 321111) rather than having a distinct occupation group. EV technician is an occupation that is separate from a traditional motor mechanic or technician though. EV technicians require different skills and training, as shown by the occupation's unique national training qualification.

EV activities make up an increasing part of the automotive industry, with the Electrical Vehicle Council estimating that there are currently about 180,000 EVs in Australia, a significant increase from the 83,000 in 2022.[5,6] Related occupations such as EV technicians are anticipated to become more important over time, with the 2023 Federal Treasury Intergenerational Report forecasting that EVs would increase from less than 1% of Australia's motor vehicle fleet in 2022-23 to 85% in 2062-63.[7]

As cars become more technologically advanced, other occupations will likely emerge that require greater digital literacy skills and technology-based training, such as programming and diagnostics, and advanced driver assistance systems technology.[8,9]

1.3 Skills shortages in the Australian economy

Australia is experiencing a tight labour market with evidence of extensive skills shortages across many occupations. Despite a slow down in economic actvitiy in late 2023 and early 2024, the Australian labour market remains tight by historic standards. The unemployment rate remains around 4%, and while softening in recent months, the number of vacancies per unemployed person remains more than double the pre-pandemic average.

There are various factors driving the current tightness in the labour market:

- **One-off shocks**: the COVID-19 pandemic presented a significant shock to migration in Austraila, with net overseas migration turning negative between December 2020 and September 2021. While inward migration has since rebounded to record highs, by September 2023 Australia's population remained below the level expected from forecasts prior to the pandemic.
- **Cyclical variations**: the strong economic recovery from the pandemic added to labour market tightness with demand for labour increasing rapidly as economic activity returned. These pressures have cooled in recent months as economic conditions have turned, with job vacancies down 14% in the year-to November 2023.
- **Long-term structural issues**: many industries in Australia are dealing with persistent imbalances between skills supply and demand. There are many possible causes for this including; a lack of qualified applicants due to issues attracting people into certain careers, issues around training quality impacting the suitability of applicants for work, or issues with retention due to pay and working conditions in an industry.

[5] Electric Vehicle Council 2023, *State of Electric Vehicles*.
[6] Electric Vehicle Council 2023, *Australian Electric Vehicle Industry Recap 2022*.
[7] Commonwealth of Australia 2023, *Intergenerational Report 2023: Australia's future to 2063*
[8] NSW Department of Education 2023, *Automotive: Automotive Technology*.
[9] The Australian Automotive Aftermarket Association (AAAA) 2022, *Protecting the Future of The Automotive Industry – Apprentice Insights*

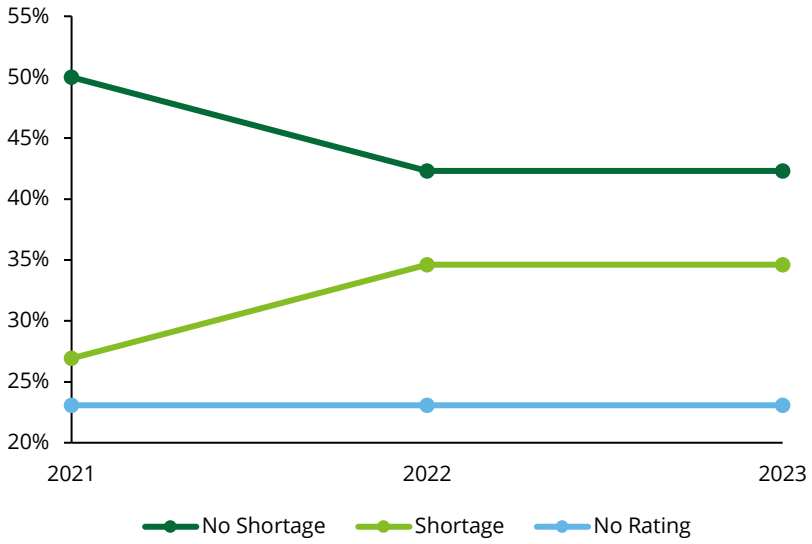
As a result of these factors, skills shortages are widespread in Australia. The latest JSA Skills Priority List showed that 36% of occupations across Australia were in shortage in 2023, five percentage points higher than the equivalent figure in 2022. Shortages were most common for Technicians and Trades Workers, with 50% of occupations in this category in shortage. Shortages have proven persistent in many occupations, which suggests that the labour market has not been able to adjust quickly or effectively enough to clear skills shortages.

Shortages in the automotive industry

Skills shortages are an issue for the automotive industry. Of the 26 six-digit ANZSCO occupations that are most prominent in the automotive industry, 35% were assessed to be in shortage by the JSA in 2023, while 42% were assessed as not in shortage. Meanwhile the remaining 23% were not rated by JSA as they are of skill level 5 and so judged to have limited barriers to entry.

The number of automotive occupations assessed to be in shortage has increased since the Skills Priority List was first published in 2021. Shortages in the automotive industry have also tended to be persistent. Of the nine automotive occupations assessed to be in shortage, seven have been in shortage since the JSA Skills Priority List began being published in 2021.

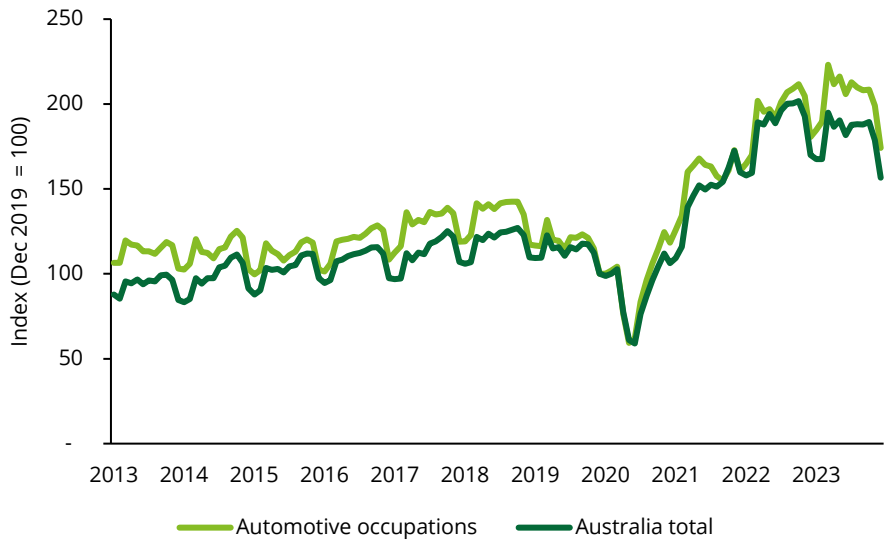
Figure 2: Share of automotive occupations assessed to be in shortage over time



Source: JSA Skills Priority List

Timely economic indicators suggest that labour demand remains elevated in the automotive industry, although it has softened in recent months. ABS data shows that online vacancies in ANZSCO unit groups relevant to the automotive industry remain above historical norms. Furthermore, vacancy levels in automotive occupations have increased by more than the national average since the beginning of the pandemic.

Figure 3: Online vacancies in occupations relevant to the automotive industry, Australia



Source: ABS Internet Vacancies Index

Previous studies into skills shortages in the automotive industry highlight that skills shortages are a key issue for business owners. Research by Capricorn in 2023 found that finding good staff was the single biggest challenge in running an automotive business in Australia and New Zealand.[10] A total of 51% of its members reported this as an issue, up 12% from 2022. Previous research from the MTAA finds that the main issue is a lack of people entering the trade (indicative of a training gap) due to perception issues in the industry, although concerns around the quality of candidates and retention of staff were also raised.[11]

In response businesses have been employing more apprentices, suggesting that firms are having to accept lower quality workers. Apprentice attrition is very high in the industry though, meaning even this has not solved the problem. An alternative way to tackle skills shortages is through migration, but Capricorn found that only around a third of businesses considered this approach due to the complexity and cost involved.

[10] Capricorn 2023, *State of the Nation, Special Report: The Skills Shortage*
[11] MTAA 2021, *MTAA: Directions in Australia's Automotive Industry: An Industry Report 2021*.

2 Survey methodology

Survey design and dissemination
The survey developed by Deloitte Access Economics was designed to align closely with JSA's requirements to inform the Skills Priority List (SPL). This involved reviewing JSA's stakeholder survey template and noting key information being sought. This included information about the organisation (for example, a classification of the primary location of the organisation); a description of skill supply by occupations; the number of vacancies filled by state and occupation; and the use of visas in selected occupations.

Desktop research was then conducted to define the industry, focusing largely on ABS datasets, as outlined in Defining the automotive industry.

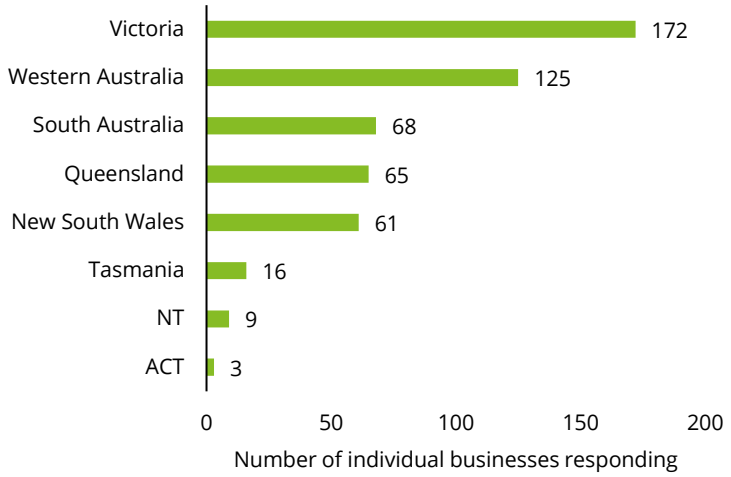
Following this research, the survey was designed containing two sections, the first to extract information about the business and the second focussing on occupational skills shortages, with a total of 17 questions (see Appendix A for survey questions and structure).

The survey was then coded in the Qualtrics platform and, following internal and external testing, was distributed through MTAA to be completed by individual member businesses from across the automotive industry.

The survey was open for approximately three weeks, from 23 January to 12 February 2024.

Survey responses
We received unique survey responses from 519 businesses which have informed the subsequent analysis in this report. These businesses employ 8,400 people, which accounts for approximately 2.2% of industry employment. The average business surveyed employed 16 people, which is slightly above the industry average. The results included a reasonable spread of businesses from across Australia, although the samples for Tasmania, Northern Territories and Australian Capital Territory were low and therefore the results for these jurisdictions should be treated with caution.

Figure 4: Survey response counts by state / territory



Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= 519 responses)

Most respondents (64%) reported that their answers were informed by personal observations of their own business. In addition to this, 19% based their responses on internal HR records, while 8% used broader industry or economy wide data. A small number of respondents used other sources such as the online platform they use for recruitment (e.g., Seek) or previous business owners.

3 Survey results

3.1 Key findings

Based on the survey findings, there were acute skills shortages in the automotive industry in 2023. Amongst the 519 businesses responding to the survey, 2,026 vacancies were advertised of which just 784 were filled, meaning the average industry fill rate was just 39%.

Most automotive occupations were in shortage, with fill rates particularly low for technician and trade workers. Four occupations currently assessed as not in shortage by Jobs and Skills Australia were found to have fill rates below 67%: tow truck drivers, tyre fitters, sales representatives (motor vehicle parts and accessories), and motor vehicle parts interpreters / automotive parts salespersons. Shortages were prevalent across all states and territories and in general were worse in regional locations compared to metropolitan regions.

The key reason highlighted for not filling vacancies was low numbers of applicants per vacancy. On average, automotive businesses received 8.2 applicants per vacancy, which compares to a national average of 17.7 in Q3 2023. [12] While low numbers of applicants were the diagnosis, many symptoms were identified by employers to be driving these issues. These included a lack of skilled / qualified workers, issues with the industry training pipeline, challenges around visas, remuneration concerns and competition from other industries, with many businesses calling for a greater focus from government on tackling the chronic lack of support for technician and trade professions in Australia.

3.2 Occupational findings

Occupational fill rates

Based on the survey findings, most automotive occupations were in shortage in 2023. According to JSA, an occupation is likely to be in shortage when the fill rate is below 67%.[13] Fill rates below 67% generally reflect that employers are facing substantial challenges filling job vacancies. Based on our findings the average fill rate in the automotive industry was just 39% in 2023. In addition, only two occupations surveyed had a fill rate above 67% - Customer Service Managers and Motor Vehicle and Caravan Salespersons.

In general, the lowest fill rates were seen in technician and trade worker occupations. For example, amongst the occupations with the lowest fill rates were motorcycle mechanic, panelbeater and vehicle body builder. Meanwhile, sales worker occupations generally had slightly higher fill rates. This trend matches findings in the JSA's most recent SPL ratings.

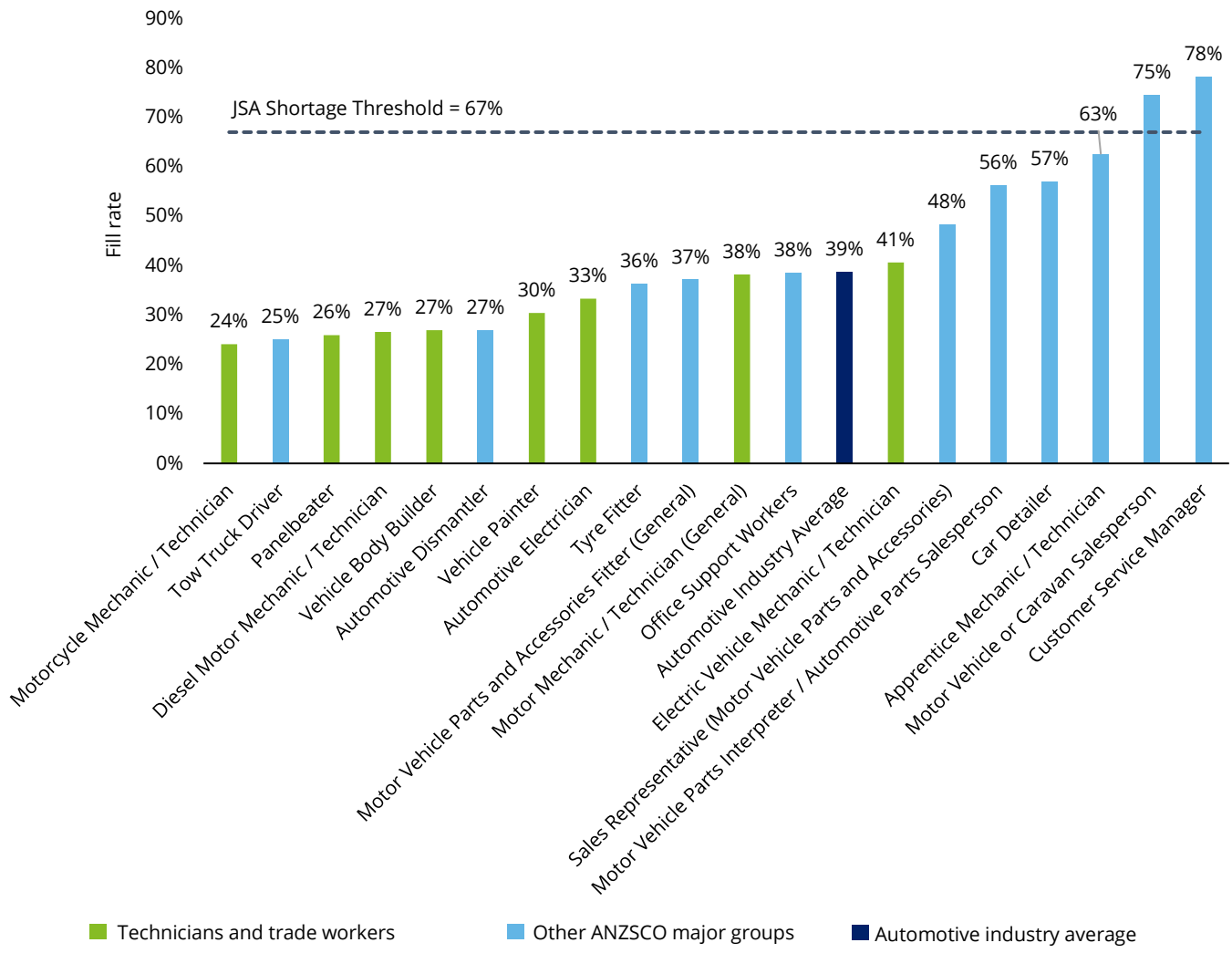
However, these findings do suggest that more automotive occupations are in shortage that in the most recent JSA SPL ratings. Four occupations assessed to have no shortage in the 2023 JSA SPL are found to have fill rates below 67%. These are:

- Tow truck drivers
- Tyre fitters
- Sales representatives (motor vehicle parts and accessories)
- Motor vehicle parts interpreters / automotive parts salespersons

In addition to this, while not rated in the SPL list owing to the skill level of the occupations, the survey found that automotive businesses are having difficulties filling vacancies for materials recyclers (automotive dismantlers) and car detailers and which had fill rates of 27% and 57% respectively. Furthermore, the fill rates for apprentice mechanics (63%), office support workers (38%), and the important emerging occupation of electric vehicle technician (41%) suggest automotive businesses are also having difficulties finding employees in these occupation groups.

[12] Jobs and Skills Australia 2023, *Labour Market Update - December 2023*
[13] Jobs and Skills Australia 2023. *Skills Priority List Methodology 2023*

Figure 5: Vacancy fill rate by occupation



Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= 519 responses). Questions: How many vacancies did your business advertise for in 2023?; of the vacancies your business advertised for in 2023, how many were filled? Note: occupations that advertised for less than 10 vacancies were excluded from this chart

Factors contributing to unfilled vacancies

In line with the reported vacancy fill rates, most businesses (93%) reported that there were not enough workers for the work available in the automotive industry. When asked about the reasons they were unable to fill vacancies, the most common reason identified was a lack of applicants (selected by 37% of respondents).

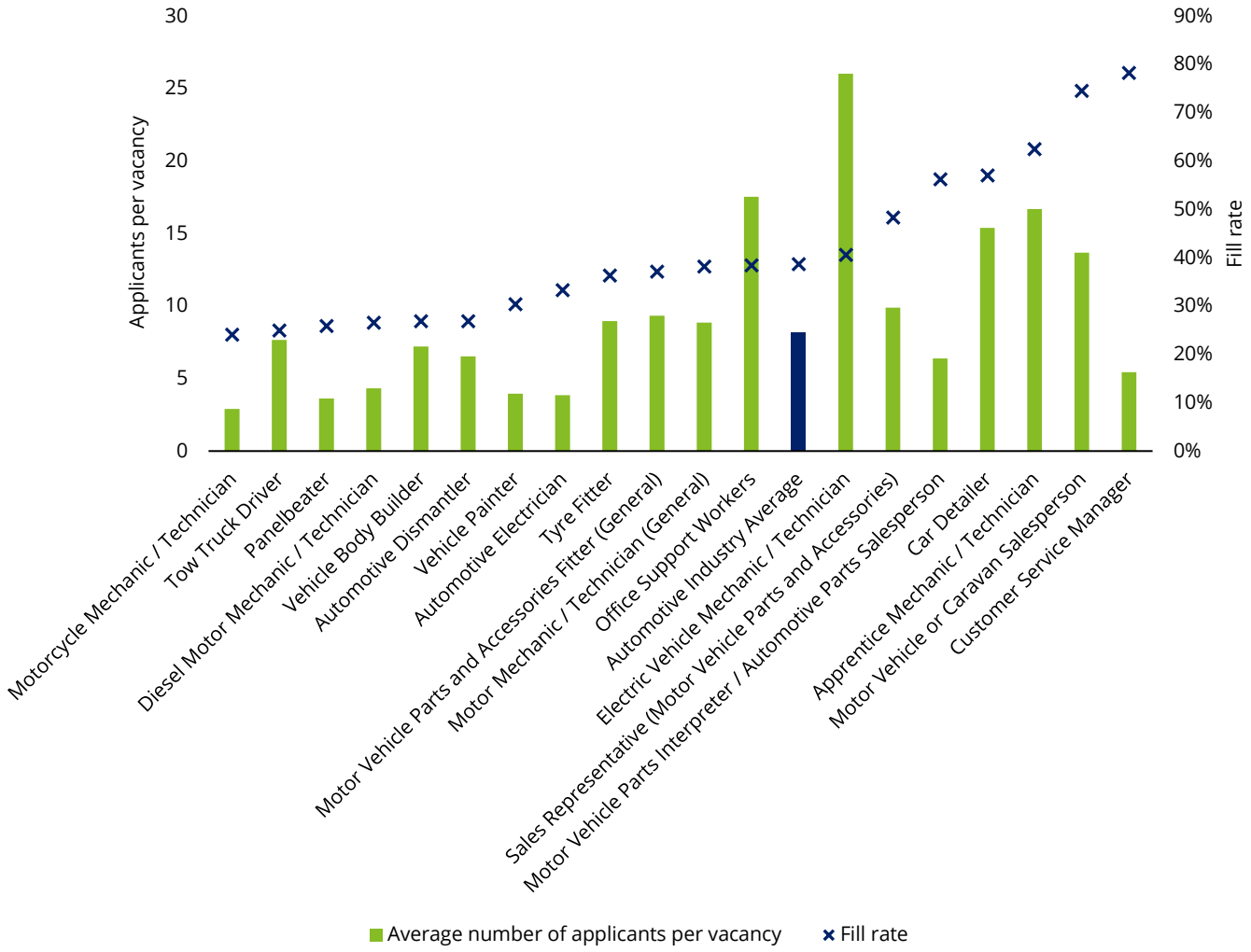
This trend of low numbers of applicants per vacancy can be seen in the data. On average, automotive businesses received 8.2 applicants per vacancy, which compares to a national average of 17.7 in Q3 2023[14]. Application numbers were particularly low for motorcycle mechanics, panelbeaters, vehicle painters, automotive electricians, and diesel motor mechanics, all of which saw fewer than 5 applications per vacancy on average.

While in general greater numbers of applicants per vacancy were associated with higher fill rates in an occupation this relationship was not linear. For example, occupations like office support workers and electric vehicle technicians had higher applicant numbers, but still struggled to fill vacancies. Equally, while applicant numbers for customer service managers were low, businesses did not appear to have issues filling these vacancies.

[14] Jobs and Skills Australia 2023, *Labour Market Update - December 2023*

This demonstrates that while low applicant numbers are a critical issue for automotive firms it is not the only issue behind skills shortages in the industry. For example, applicants lacking experience (16%) and applicants lacking qualifications (15%) were also highlighted by businesses as reasons for not filling vacancies.

Figure 6: Applicants per vacancy vs fill rates by occupation



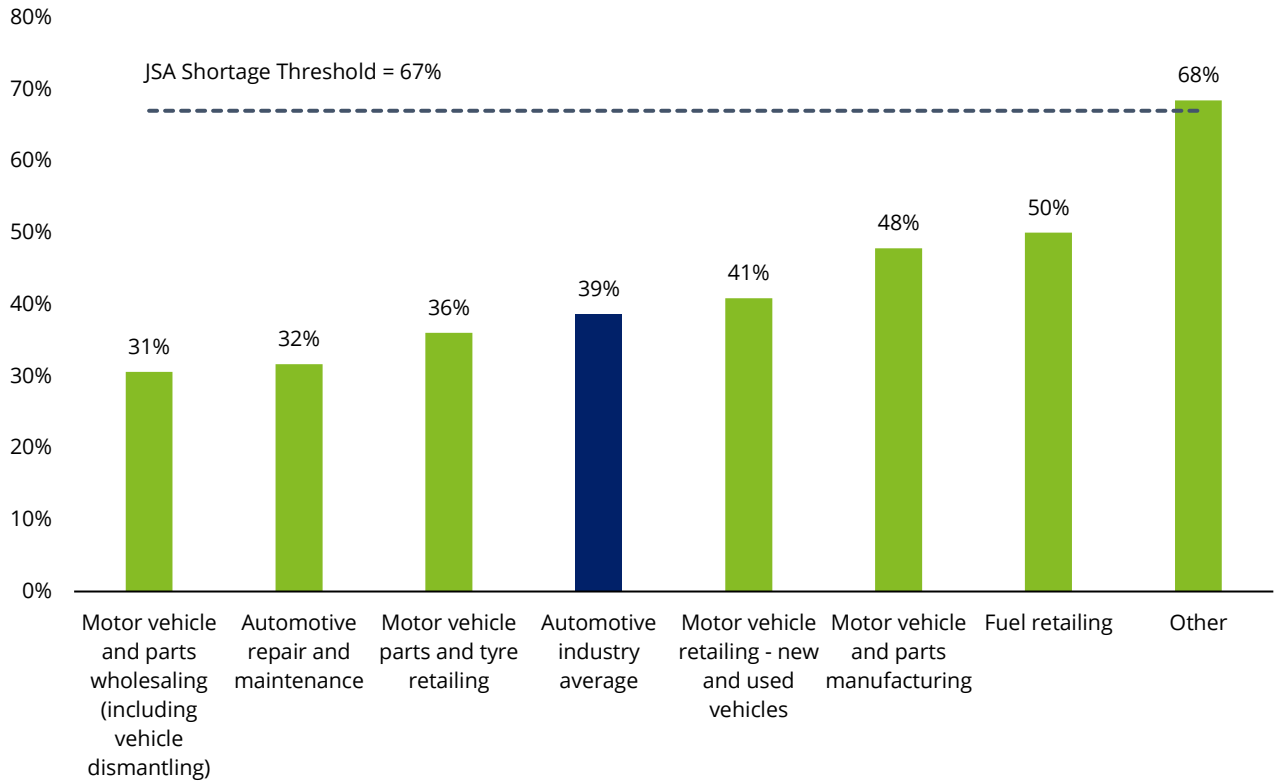
Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= 519 responses). Questions: How many vacancies did your business advertise for in 2023?; on average, how many applicants applied for each vacancy your business advertised for in 2023?; and of the vacancies your business advertised for in 2023, how many were filled? Note: occupations that advertised for less than 10 vacancies were excluded from this chart

3.3 Sub-industry findings

Looking at the data by sub-industry, vacancies were hardest to fill in motor vehicle and parts wholesaling (including vehicle dismantling) and automotive repair and maintenance, with fill rates of 31% and 32% respectively. Employers surveyed also experienced greater difficulty than the industry average in filling roles for motor vehicle parts and tyre retailing, with a fill rate of 36%. On the other hand, fuel retailing recorded the highest fill rate of all the sub-industries, at 50%, although this is still significantly below the JSA shortage threshold.

The fill rate seen in “other” sub-industries was higher at 68%. This category contains businesses around the fringes of the automotive industry that did not place themselves into any of the key sub-industries identified. These included: five businesses in agricultural and/or heavy goods vehicles (activities unspecified), one mining and transport business, one marine vehicles business, one towing business, one recreational vehicle business, one automotive membership body, and one training organisation.

Figure 7: Sub-industry fill rates



Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= x responses), Questions: How many vacancies did your business advertise for in 2023?; on average, how many applicants applied for each vacancy your business advertised for in 2023?; and of the vacancies your business advertised for in 2023, how many were filled?

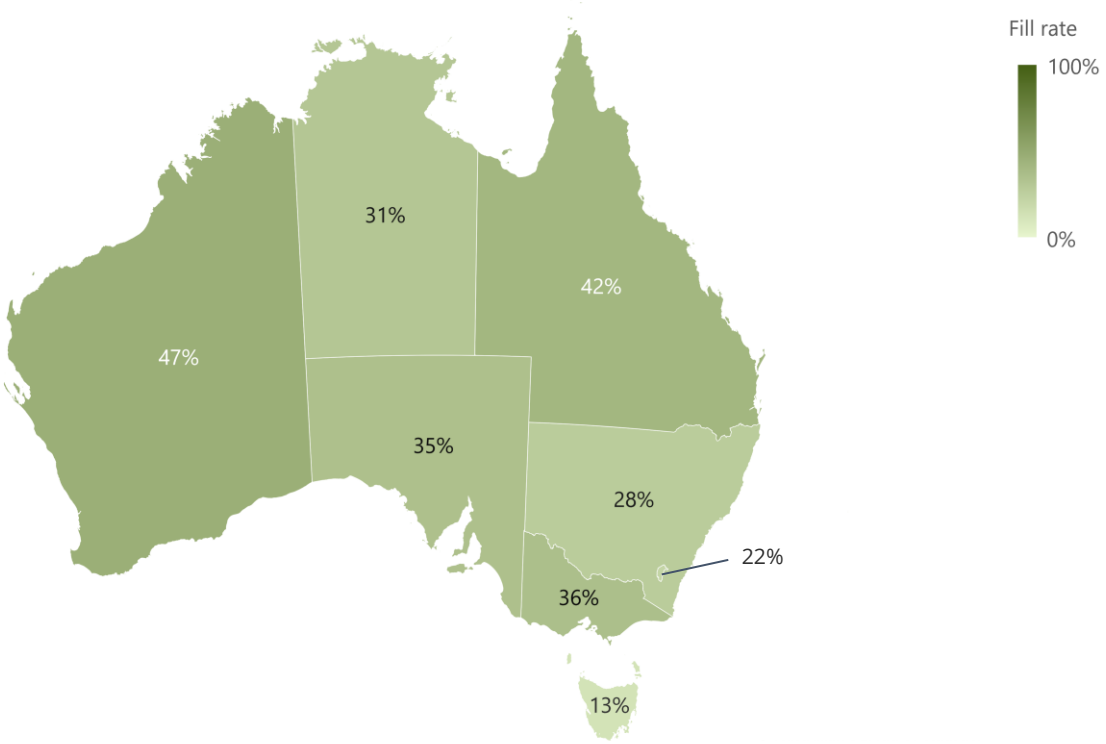
3.4 Geographical findings

Skills shortages by state

Skills shortages in the automotive industry were prevalent across all states and territories in Australia. Every state and territory had an average fill rate of less than 50% across the automotive industry, although the results for ACT, NT and Tasmania should be treated with caution due to low sample sizes in these locations.

While there was some variability between states, this was relatively minor. Compared to the national fill rate of 39%, the fill rates in Western Australia and Queensland were slightly higher, at 47% and 42% respectively. Meanwhile, New South Wales experienced a lower fill rate of 28%. New South Wales experienced particularly low fill rates for panel beaters and vehicle painters, at approximately 10% per occupation, compared to the average of 26% across all jurisdictions. New South Wales also recorded the lowest numbers of applicants per vacancy, at 3.9.

Figure 8: Fill rates by jurisdiction



Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= 519 responses), Questions: How many vacancies did your business advertise for in 2023?; of the vacancies your business advertised for in 2023, how many were filled?

Differences across regional and metropolitan areas

Skills shortages tended to be more acute in regional locations. Across the automotive industry the average fill rate was 33% in regional areas compared to 41% in metropolitan locations. This trend was consistent across most occupations with 16 out of the 20 occupations that recorded at least ten vacancies in the survey seeing lower fill rates in regional Australia. Interestingly, alongside apprentice mechanics, the three occupations that had higher fill rates in regional Australia were the only three occupations in the ANZSCO major group Labourers. [15] This indicates that compared to other occupations, Labourers may be in greater supply in regional Australia.

[15] The survey asked about other Labourer occupations, but less than 10 vacancies were reported for these occupations.

Table 2: Regional and metropolitan fill rates by occupation

ANZSCO major group	Occupation	Regional fill rate (%)	Metro fill rate (%)	Difference (regional – metro)
NA	Apprentice Mechanic / Technician	100%	46%	54%
8	Tyre Fitter	50%	34%	16%
8	Motor Vehicle Parts and Accessories Fitter (General)	46%	32%	14%
8	Car Detailer	57%	57%	1%
3	Vehicle Painter	29%	31%	-2%
6	Materials Recycler (Automotive Dismantler)	25%	28%	-3%
3	Motorcycle Mechanic / Technician	20%	25%	-5%
3	Motor Mechanic / Technician (General)	33%	40%	-6%
3	Diesel Motor Mechanic / Technician	22%	30%	-8%
NA	**Automotive Industry Average**	**33%**	**41%**	**-8%**
6	Motor Vehicle Parts Interpreter / Automotive Parts Salesperson	50%	59%	-9%
5	Office Support Workers	33%	43%	-10%
6	Sales Representative (Motor Vehicle Parts and Accessories)	41%	55%	-14%
3	Panelbeater	16%	30%	-14%
6	Motor Vehicle or Caravan Salesperson	57%	77%	-20%
3	Vehicle Body Builder	9%	32%	-23%
7	Tow Truck Driver	20%	50%	-30%
3	Automotive Electrician	14%	46%	-32%
3	Electric Vehicle Mechanic / Technician	0%	43%	-43%
1	Customer Service Manager	25%	89%	-64%

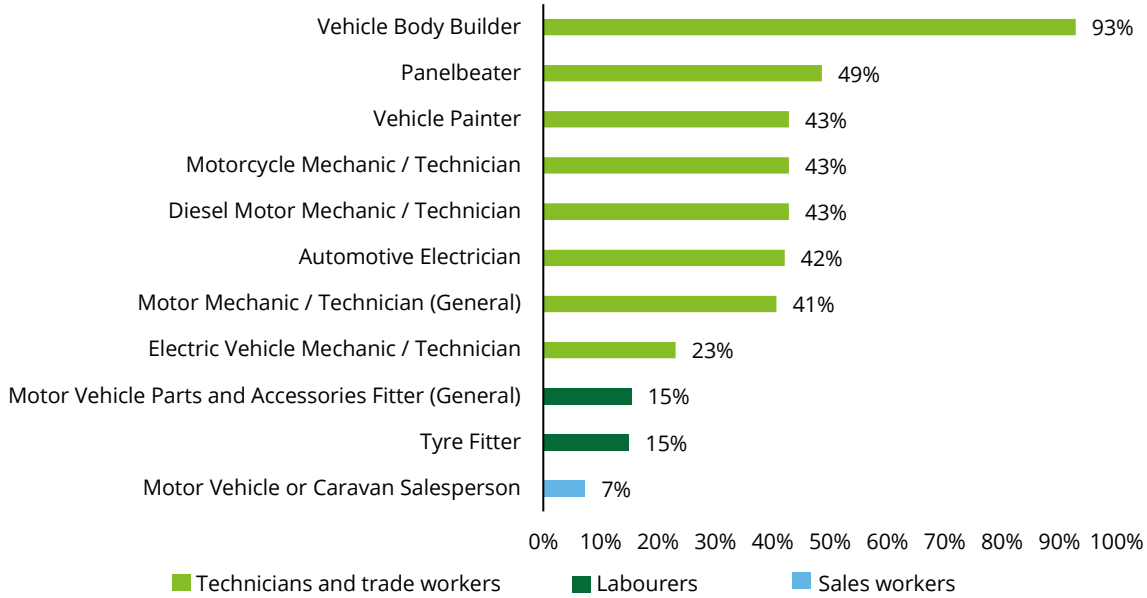
Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= 519 responses), Questions: How many vacancies did your business advertise for in 2023?; of the vacancies your business advertised for in 2023, how many were filled? Note: occupations that advertised for less than 10 vacancies were excluded from this table

3.5 Other trends

Automotive employers appear to be willing to accept workers with limited experience when advertising for job vacancies. On average, employers sought out workers with just over 2 years of experience. In particular, employers recruiting car detailers and tyre fitters sought less than 1 year of experience on average for these roles. Meanwhile, employers sought out the most experienced workers for vehicle body builder roles, averaging more than 4 years of experience for advertised vacancies.

The use of visa sponsorship to address workforce needs is common, particularly for occupations in the Technicians and Trade Workers ANZSCO major group, perhaps in response to the lower fill rates seen in these occupations. Across the industry, 29% of job vacancies were filled through visa sponsorship. Vehicle body builders recorded the highest share of vacancies filled through visa sponsorship, at 93%. However, the largest number of visa sponsorships were used for motor vehicle mechanics (general) – the largest occupation in the industry. Survey respondents reported that 109 vacancies (41%) in this occupation were filled through employer sponsored visas. This suggests that there are low numbers of skilled local applicants in the technician and trade worker occupations.

Figure 9: Share of vacancies filled through employer sponsored visas by occupation.



Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= 519 responses), Questions: Of the vacancies your business advertised for in 2023, how many were filled?; How many vacancies did your business use an Employer Sponsored Visa to fill the selected occupations in 2023?. Note: occupations that did not use employer sponsored visa have been excluded from this chart, alongside occupations that advertised for less than 10 vacancies.

Industry perspectives on the skills shortage

Five key themes emerged in the open responses about skills shortages in the industry which were all interconnected in some way:

- A lack of skilled and qualified workers
- Issues with the industry training pipeline
- Challenges with visas
- Remuneration concerns
- Competition from mining and other industries

The most common theme was the lack of skilled and qualified workers, an issue that many employers pointed out was a long-standing issue within the industry. This concern was often related to specific roles, particularly mechanics. Employers expressed concerns about a lack of suitable workers due to applicants having limited experience and many senior workers approaching retirement age. Employers in regional and remote areas pointed out that they particularly suffered from a lack of skilled workers or that it was hard to attract workers to their area. Some employers related the issue of a lack of skilled or qualified workers to issues with the training pipeline.

Concerns about the industry's training pipeline were the second most common theme. Concerns were raised about the quality and depth of training programs, with employers noting that graduates of these programs are not adequately skilled in the practical applications of the trade. Employers wanted greater promotion of careers in the industry to students and school leavers by the government. They also wanted more trade courses to be available to high school students given the heavy emphasis on school leavers pursuing tertiary education over trades. Employers also sought more government support for apprenticeships, for example through providing more subsidies for apprentices' wages, or better incentives to take on apprentices. It was noted that low pay can lead to challenges attracting and retaining apprentices, and for promoting the industry in schools.

Many employers expressed interest in using visas to bring in skilled workers from overseas. The key barriers to doing so were the costs being prohibitive, particularly for smaller businesses, and the length and complexity of the sponsorship process. Some employers raised concerns about visa sponsorship being 'risky' as there was no guarantee the employee would stay at the business, despite the investment by the employer.

Remuneration was another key issue raised. Due to a low supply of skilled workers, jobs applicants were demanding wages above what small businesses could feasibly pay and there was a need to offer much higher than award wages to retain quality staff. Small businesses reported that wage pressures presented a challenge between gaining and retaining staff and offering customers reasonable prices for services. Interestingly, while some respondents pointed out that higher wages were unviable, others noted that the pay in the industry was too low and did not match the technical knowledge requirements of workers. A key factor driving remuneration concerns was the wage competition from large mining companies, with employers noting they cannot remain viable if they offered similar wages.

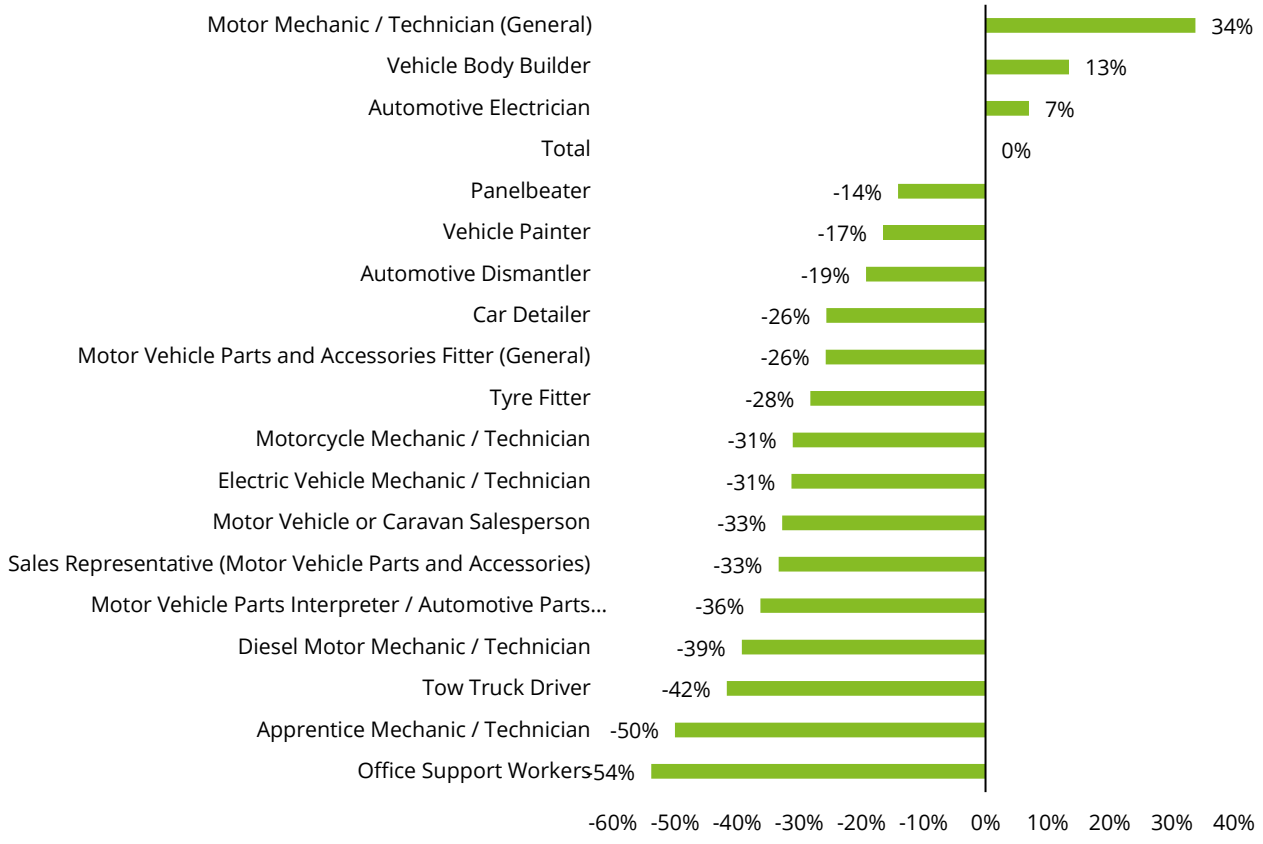
The impact of competition from the mining industry was a broad concern raised. This was in relation to the pay and conditions offered by mining companies. Employers mentioned they were losing prospective workers who moved to work in the mining industry after completing training for higher pay. Other industries posing competition for workers through offering higher remuneration were agriculture and government infrastructure projects.

3.6 Expectations for 2024

On aggregate, automotive employers expect to recruit around the same number of people in 2024 as in 2023 (0% change). This is likely driven by various factors with automotive employers likely needing to recruit to fill existing shortages, but equally some businesses may be expecting demand to weaken in 2024 due to the challenging external economic environment.

While across most occupations employers expect to recruit for fewer vacancies in 2024, a notable exception is Motor Mechanics / Technicians (General) where recruitment is expected to increase by 34%. As the largest occupation in the industry this counteracts the negative growth expected across many other occupations.

Figure 10: Vacancy recruitment change by occupation, from 2023 to 2024



Source: Skills Shortages in the Automotive Industry Survey, Deloitte Access Economics (n= 519 responses), Question: Considering the occupations you recruited for in 2023, how many vacancies is your business likely to recruit for over the next 12 months? Note: occupations that advertised for less than 10 vacancies were excluded from this chart.

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Appendix A: Survey questions

Skills shortages in the automotive industry survey

Introduction:

The Motor Trades Association of Australia (MTAA) has engaged Deloitte Access Economics to support their response to Job and Skills Australia's (JSA) 2024 Skills Priority List stakeholder survey.

The Skills Priority List is used to assess current skills shortages and future labour demand in industries across Australia. It is a key resource used to shape domestic education and training policy and informs Australia's Migration Program planning.

Through completing this survey, you will contribute to the evidence base supporting JSA's 2024 Skills Priority List, which will inform government decision making about skill needs in the automotive industry.

This survey is being sent to current MTAA members and should be filled out by individual businesses. Please only provide one response per business. The findings from this survey will be used by Deloitte Access Economics and MTAA for the purpose of completing the JSA Skills Priority List Stakeholder survey for the automotive industry.

Only aggregated responses will be reported, meaning your business will not be identified in any information provided to JSA.

If you have any questions about Deloitte's privacy policy or about the survey, please contact autoskillssurvey@deloitte.com.au.

Section 1: About your business

These questions relate to the business you are reporting on behalf of.

1. What is the name of your business?

OPEN RESPONSE (TEXT)

2. Which state or territory is the primary location of your business? Please select one.

[Field]	[Response]
1	New South Wales
2	Victoria
3	Queensland
4	South Australia
5	Western Australia
6	Tasmania
7	ACT
8	NT

3. What is the postcode of the primary location your business?

OPEN RESPONSE (NUMERIC)

4. How many employees does your business currently employ? Please enter the number value.

OPEN RESPONSE (NUMERIC)

5. Which category best describes your business? Please select one.

[Field]	[Response]
1	Automotive repair and maintenance
2	Motor vehicle and parts wholesaling (including vehicle dismantling)
3	Motor vehicle retailing - new and used vehicles
4	Motor vehicle parts and tyre retailing
5	Fuel retailing
6	Motor vehicle and parts manufacturing
7	Other, please specify
99	Do not know [END OF SURVEY]

6. Did your business advertise any vacancies in 2023 and if not, why?

[Field]	[Response]
1	Yes, my business advertised vacancies in 2023
2	No, my business did not advertise any vacancies in 2023 [END OF SURVEY]

7. What occupations did your business recruit for in 2023? Please select all that apply.

[Field]	[Response]
1	Autoglazier
2	Automotive Dismantler
3	Automotive Electrician
4	Car Detailer
5	Checkout Operator
6	Diesel Motor Mechanic / Technician
7	Electric Vehicle Mechanic / Technician
8	Exhaust and Muffler Repairer
9	Fleet Manager
10	Motor Mechanic / Technician (General)

11	Motor Vehicle or Caravan Salesperson
12	Motor Vehicle Parts and Accessories Fitter (General)
13	Motor Vehicle Parts Interpreter / Automotive Parts Salesperson
14	Motorcycle Mechanic / Technician
15	Panelbeater
16	Radiator Repairer
17	Rental Salesperson
18	Sales Representative (Motor Vehicle Parts and Accessories)
19	Service Station Attendant
20	Small Engine Mechanic / Technician
21	Tow Truck Driver
22	Transport Company Manager
23	Tyre Fitter
24	Vehicle Body Builder
25	Vehicle Painter
26	Vehicle Trimmer
27	Other (please specify)

Section 2: Occupational skills shortages

These questions relate to your business's experience recruiting for the selected occupations in 2023.

8. Please complete the below table with information on the occupations your business recruited for in 2023. Please enter the number value for each occupation.

Occupation	How many vacancies did your business advertise for in 2023?	On average, how many applicants applied for each vacancy your business advertised for in 2023?	Of the vacancies your business advertised for in 2023, how many were filled?
Autoglazier			
Automotive Dismantler			
Automotive Electrician			
Car Detailer			
Checkout Operator			
Diesel Motor Mechanic / Technician			

Electric Vehicle Mechanic / Technician			
Exhaust and Muffler Repairer			
Fleet Manager			
Motor Mechanic / Technician (General)			
Motor Vehicle or Caravan Salesperson			
Motor Vehicle Parts and Accessories Fitter (General)			
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson			
Motorcycle Mechanic / Technician			
Panelbeater			
Radiator Repairer			
Rental Salesperson			
Sales Representative (Motor Vehicle Parts and Accessories)			
Service Station Attendant			
Small Engine Mechanic / Technician			
Tow Truck Driver			
Transport Company Manager			
Tyre Fitter			
Vehicle Body Builder			
Vehicle Painter			
Vehicle Trimmer			
Other (please specify)			

9. If your business did not fill all its vacancies in 2023, what was the primary reason for this? Please select one reason per occupation.

Occupation	Not enough applicants	Applicants lacked experience	Applicants lacked communication skills	Applicants lacked qualifications	Applicants lacked technical skills	Other	Not applicable
Autoglazier							
Automotive Dismantler							
Automotive Electrician							
Car Detailer							
Checkout Operator							
Diesel Motor Mechanic / Technician							
Electric Vehicle Mechanic / Technician							
Exhaust and Muffler Repairer							
Fleet Manager							
Motor Mechanic / Technician (General)							
Motor Vehicle or Caravan Salesperson							
Motor Vehicle Parts and Accessories Fitter (General)							
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson							
Motorcycle Mechanic / Technician							

Panelbeater							
Radiator Repairer							
Rental Salesperson							
Sales Representative (Motor Vehicle Parts and Accessories)							
Service Station Attendant							
Small Engine Mechanic / Technician							
Tow Truck Driver							
Transport Company Manager							
Tyre Fitter							
Vehicle Body Builder							
Vehicle Painter							
Vehicle Trimmer							
Other (please specify)							

10. If you selected 'other' as the primary reason your business did not fill all its vacancies in 2023, please describe the primary reason for each occupation selected.

Occupation	Primary reason your business did not fill all its vacancies for this occupation
Autoglazier	
Automotive Dismantler	
Automotive Electrician	
Car Detailer	
Checkout Operator	
Diesel Motor Mechanic / Technician	

Electric Vehicle Mechanic / Technician	
Exhaust and Muffler Repairer	
Fleet Manager	
Motor Mechanic / Technician (General)	
Motor Vehicle or Caravan Salesperson	
Motor Vehicle Parts and Accessories Fitter (General)	
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson	
Motorcycle Mechanic / Technician	
Panelbeater	
Radiator Repairer	
Rental Salesperson	
Sales Representative (Motor Vehicle Parts and Accessories)	
Service Station Attendant	
Small Engine Mechanic / Technician	
Tow Truck Driver	
Transport Company Manager	
Tyre Fitter	
Vehicle Body Builder	
Vehicle Painter	
Vehicle Trimmer	
Other (please specify)	

11. Based on your business's experience, which of the statements below best describes the available skills supply for the selected occupations in 2023? Please select one reason per occupation.

Occupation	There are not enough workers for the work available	There are enough workers for the work available	There are too many workers for the work available
Autoglazier			
Automotive Dismantler			

Automotive Electrician			
Car Detailer			
Checkout Operator			
Diesel Motor Mechanic / Technician			
Electric Vehicle Mechanic / Technician			
Exhaust and Muffler Repairer			
Fleet Manager			
Motor Mechanic / Technician (General)			
Motor Vehicle or Caravan Salesperson			
Motor Vehicle Parts and Accessories Fitter (General)			
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson			
Motorcycle Mechanic / Technician			
Panelbeater			
Radiator Repairer			
Rental Salesperson			
Sales Representative (Motor Vehicle Parts and Accessories)			
Service Station Attendant			
Small Engine Mechanic / Technician			
Tow Truck Driver			
Transport Company Manager			
Tyre Fitter			
Vehicle Body Builder			
Vehicle Painter			

Vehicle Trimmer			
Other (please specify)			

12. Where did your business advertise your vacancies in 2023? Please select one answer per occupation.

Occupation	Regional areas	Metropolitan areas	Both regional and metropolitan areas
Autoglazier			
Automotive Dismantler			
Automotive Electrician			
Car Detailer			
Checkout Operator			
Diesel Motor Mechanic / Technician			
Electric Vehicle Mechanic / Technician			
Exhaust and Muffler Repairer			
Fleet Manager			
Motor Mechanic / Technician (General)			
Motor Vehicle or Caravan Salesperson			
Motor Vehicle Parts and Accessories Fitter (General)			
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson			
Motorcycle Mechanic / Technician			
Panelbeater			
Radiator Repairer			
Rental Salesperson			
Sales Representative (Motor Vehicle Parts and Accessories)			

Service Station Attendant			
Small Engine Mechanic / Technician			
Tow Truck Driver			
Transport Company Manager			
Tyre Fitter			
Vehicle Body Builder			
Vehicle Painter			
Vehicle Trimmer			
Other (please specify)			

13. On average, how many years of experience does your business seek for applicants for the selected occupations? Please enter the number value.

Occupation	Years of experience
Autoglazier	
Automotive Dismantler	
Automotive Electrician	
Car Detailer	
Checkout Operator	
Diesel Motor Mechanic / Technician	
Electric Vehicle Mechanic / Technician	
Exhaust and Muffler Repairer	
Fleet Manager	
Motor Mechanic / Technician (General)	
Motor Vehicle or Caravan Salesperson	
Motor Vehicle Parts and Accessories Fitter (General)	
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson	
Motorcycle Mechanic / Technician	
Panelbeater	

Radiator Repairer	
Rental Salesperson	
Sales Representative (Motor Vehicle Parts and Accessories)	
Service Station Attendant	
Small Engine Mechanic / Technician	
Tow Truck Driver	
Transport Company Manager	
Tyre Fitter	
Vehicle Body Builder	
Vehicle Painter	
Vehicle Trimmer	
Other (please specify)	

14. How many vacancies did your business use an Employer Sponsored Visa to fill the selected occupations in 2023? Please enter the number value.

Occupation	Number of Employer Sponsored Visas used
Autoglazier	
Automotive Dismantler	
Automotive Electrician	
Car Detailer	
Checkout Operator	
Diesel Motor Mechanic / Technician	
Electric Vehicle Mechanic / Technician	
Exhaust and Muffler Repairer	
Fleet Manager	
Motor Mechanic / Technician (General)	
Motor Vehicle or Caravan Salesperson	
Motor Vehicle Parts and Accessories Fitter (General)	
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson	

Motorcycle Mechanic / Technician	
Panelbeater	
Radiator Repairer	
Rental Salesperson	
Sales Representative (Motor Vehicle Parts and Accessories)	
Service Station Attendant	
Small Engine Mechanic / Technician	
Tow Truck Driver	
Transport Company Manager	
Tyre Fitter	
Vehicle Body Builder	
Vehicle Painter	
Vehicle Trimmer	
Other (please specify)	

15. Considering the occupations you recruited for in 2023, how many vacancies is your business likely to recruit for over the next 12 months? Please enter a number value

Occupation	Number of vacancies your business is likely to recruit for over the next 12 months
Autoglazier	
Automotive Dismantler	
Automotive Electrician	
Car Detailer	
Checkout Operator	
Diesel Motor Mechanic / Technician	
Electric Vehicle Mechanic / Technician	
Exhaust and Muffler Repairer	
Fleet Manager	
Motor Mechanic / Technician (General)	
Motor Vehicle or Caravan Salesperson	

Motor Vehicle Parts and Accessories Fitter (General)	
Motor Vehicle Parts Interpreter / Automotive Parts Salesperson	
Motorcycle Mechanic / Technician	
Panelbeater	
Radiator Repairer	
Rental Salesperson	
Sales Representative (Motor Vehicle Parts and Accessories)	
Service Station Attendant	
Small Engine Mechanic / Technician	
Tow Truck Driver	
Transport Company Manager	
Tyre Fitter	
Vehicle Body Builder	
Vehicle Painter	
Vehicle Trimmer	
Other (please specify)	

16. What sources of information helped you complete the survey? Please select all answers that apply.

[Field]	[Response]
1	Internal HR records
2	Observations of my business
3	Broader industry or economy-wide data
4	Other (please specify)

17. Please enter any further comments or concerns you may have about skills shortages in the automotive industry.

OPEN RESPONSE (TEXT)

Deloitte.

General use restriction

This report is prepared solely for the use of Motor Trades Association of Australia (MTAA). This report is not intended to and should not be used or relied upon by anyone else and we accept no duty of care to any other person or entity. The report has been prepared for the purpose of supporting the MTAA to prepare their response to Jobs and Skills Australia's 2024 Skills Priority List stakeholder survey. You should not refer to or use our name or the advice for any other purpose.

Deloitte Access Economics is Australia's pre-eminent economics advisory practice and a member of Deloitte's global economics group. For more information, please visit our website: www.deloitte.com/au/deloitte-access-economics

Appendix B:

Real time wage data provided by Seek.com.au

seek

Menu

E.g. nurse, resume, interview, sales...

Career Advice

Explore salaries

Trades & Services

Role title	Salary growth	Job ad growth	Average salary	Job ads
Baker	▲ 34%	▲ 28%	▲ $57,709	
Security Officer	▲ 10%	▲ 10%	▲ $59,773	
Mechanical Technician	▲ 8%	▲ 23%	▲ $76,585	
Service Manager	▲ 8%	▲ 16%	▲ $98,237	
Maintenance Fitter	▲ 7%	▲ 38%	▲ $84,579	
Fitter And Turner	▲ 7%	▲ 25%	▲ $73,582	
Parts Interpreter	▲ 7%	▲ 3%	▲ $60,009	
Maintenance Electrician	▲ 6%	▲ 11%	▲ $94,232	
Trades Assistant	▲ 6%	▲ 3%	▲ $64,195	

Automotive Electrician	▲ 6%	▲ 12%	▲ $95,320
Diesel Fitter	▲ 6%	▲ 7%	▲ $101,374
Civil Labourer	▲ 6%	▲ 27%	▲ $64,522
Pest Control Technician	▲ 6%	▲ 6%	▲ $57,978
Maintenance Officer	▲ 6%	▲ 8%	▲ $60,651
Spraypainter	▲ 5%	▲ 4%	▲ $74,349
Service Technician	▲ 5%	▲ 8%	▲ $75,499
Field Service Technician	▲ 5%	▲ 13%	▲ $84,218
Heavy Vehicle Mechanic	▲ 4%	▲ 22%	▲ $82,736
Panel Beater	▲ 3%	▲ 9%	▲ $80,868

ⓘ Based on full-time salaries on SEEK job ads in the last three months, compared with the three months prior.