

Human Services Skills Organisation

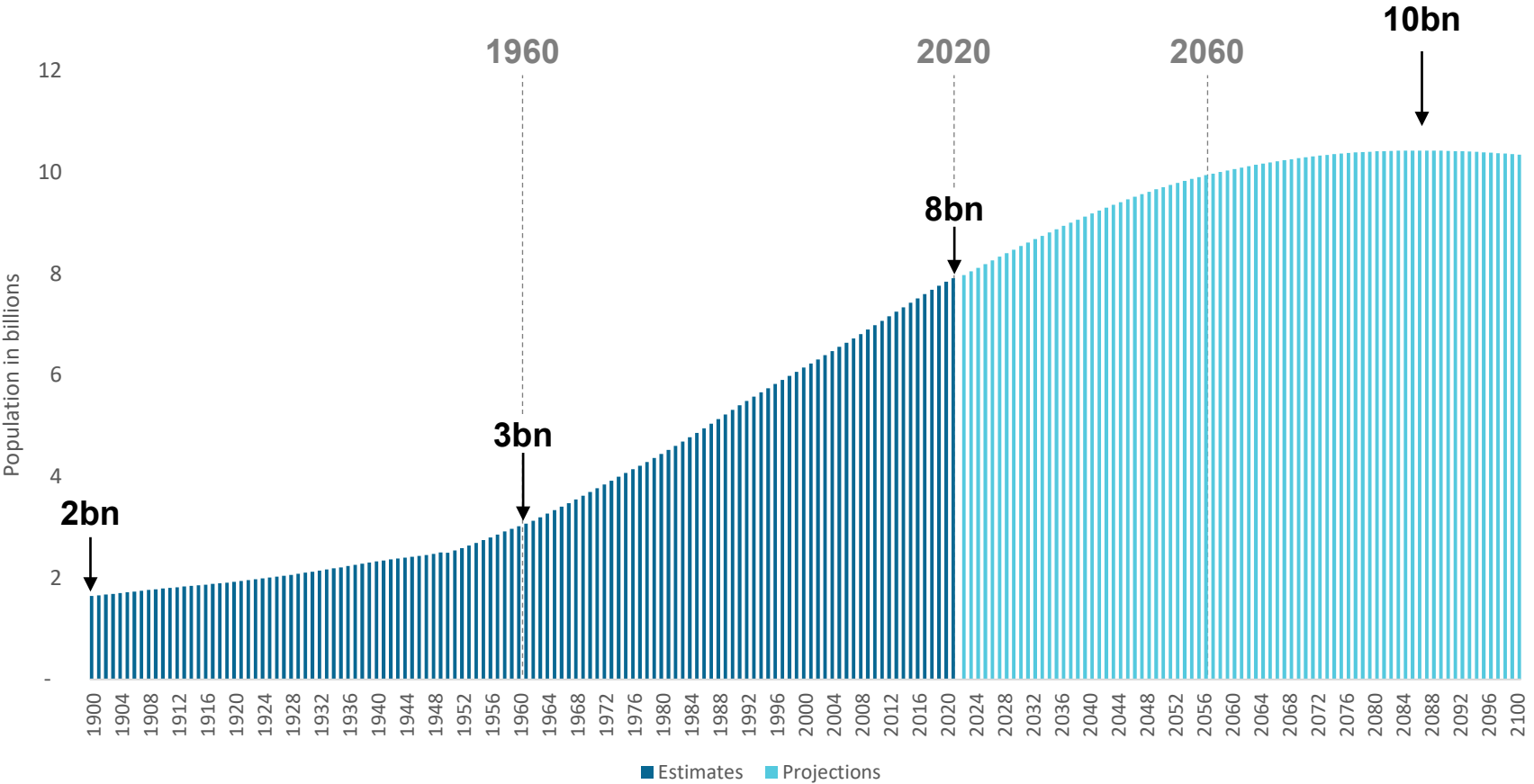
The Big Care Shift: Census insights into Australia's support workforce

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Slower growth results in shallower pools of immigrant labour



World population each year from 1900 to 2100

Source: UN World Population Prospects 2022

Australians spend their wealth on housing, lifestyle, wellness



1.
United States
22,998



2.
China
17,458



3.
Japan
4,937



4.
Germany
4,226



5.
United Kingdom
3,188



6.
India
3,042



7.
France
2,935



8.
Italy
2,101



9.
Canada
1,991



10.
South Korea
1,799



11.
Russia
1,776



12.
Australia
1,633



13.
Brazil
1,608



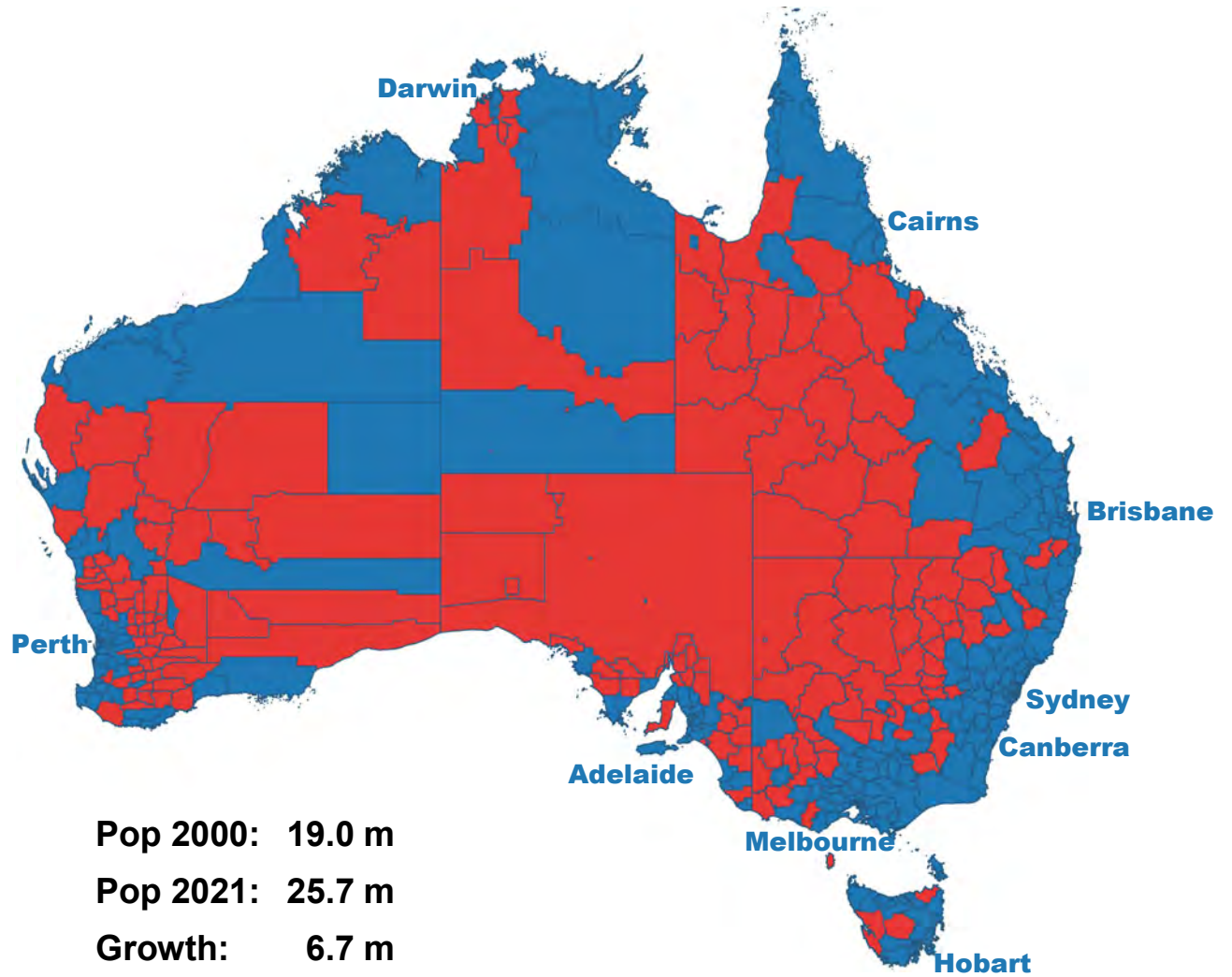
14.
Spain
1,426



15.
Mexico
1,295

Top 15 countries by GDP 2021
(in USD bn)

Australia is a prosperous, lifestyle-focussed nation with a preference for coastal living... with big lifestyle, wellness, care expectations



Pop 2000: 19.0 m













Pop 2021: 25.7 m

Growth: 6.7 m

Areas of population growth and loss between 2000 and 2021

Source: Based on Australian Bureau of Statistics data; The Demographics Group

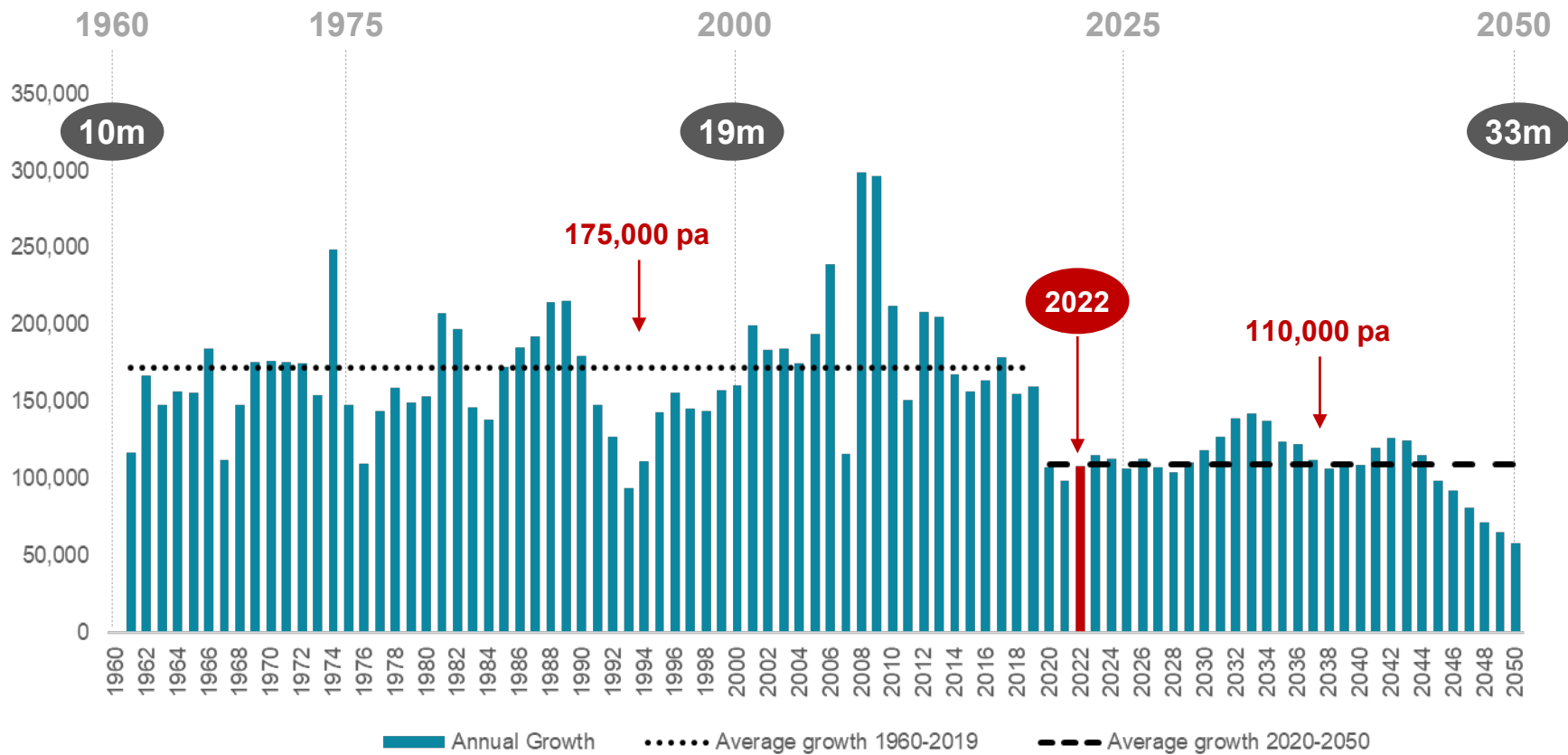
Australia attracts workers from India, The Philippines & Nepal

	2021	Change 2016-2021
 United Kingdom	1,108,000	2%
 India	673,000	48%
 China	550,000	8%
 New Zealand	530,000	2%
 Philippines	294,000	26%
 Vietnam	258,000	18%
 South Africa	189,000	16%
 Malaysia	166,000	20%
 Italy	163,000	-6%
 Sri Lanka	132,000	20%
 Nepal	123,000	124%
 South Korea	102,000	3%
Total	25 million	9%

Pop. AU 2021
born O/S
28%

Australian migrant community by country of birth in 2021 and change from 2016

Australia's 'baby bust' drains the local labour pool



Net annual growth in Australia's working age population (15-64) between 1960 and 2050

Care has been the big growth industry over the last 5 years

Growth Occupations Australia	Change 2016-2021
1. Aged or Disabled Carer	95,000
2. Policy and Planning Manager	30,000
3. Delivery Driver	29,000
4. Child Care Worker	27,000
5. Storeperson	26,000
6. General Clerk	25,000
7. Medical Receptionist	25,000
8. Software Engineer	25,000
9. Marketing Specialist	20,000
10. Secondary School Teacher	18,000

Total workforce			
2016:	10,684,000	2021:	12,049,000
Change:	1,366,000	Change(%):	13%

Growth Occupations Australia	Change 2011-2016
1. Sales Assistant (General)	69,000
2. Aged or Disabled Carer	24,000
3. Chef	23,000
4. Domestic Cleaner	21,000
5. Kitchenhand	17,000
6. Construction Project Manager	17,000
7. Enrolled Nurse	16,000
8. Registered Nurse (Critical Care & Emergency)	16,000
9. Child Care Worker	16,000
10. Barista	16,000

Total workforce			
2011:	10,058,000	2016:	10,684,000
Change:	626,000	Change(%):	6%

Net change in employment by occupation in Australia over 5 years to 2021 and over 5 years to 2016

Care and support jobs on the rise in Australia



Aged or Disabled Carer
Up: 95,000 or 72%
Total: 228,000



Child Care Worker
Up: 27,000 or 29%
Total: 124,000



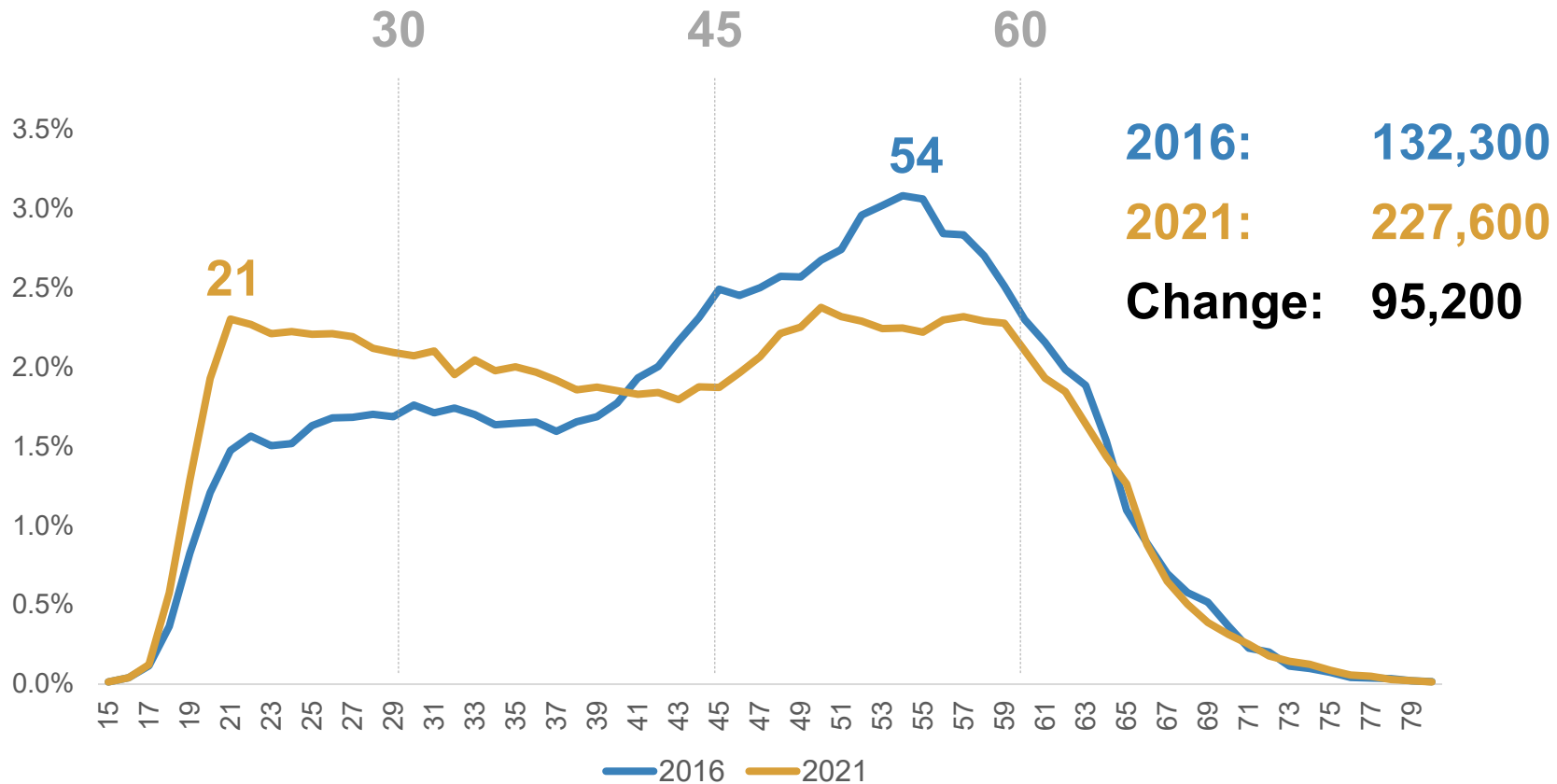
Personal Care Assistant
Up: 13,000 or 46%
Total: 42,000



**Registered Nurse
(Critical Care and Emergency)**
Up: 9,000 or 28%
Total: 42,000

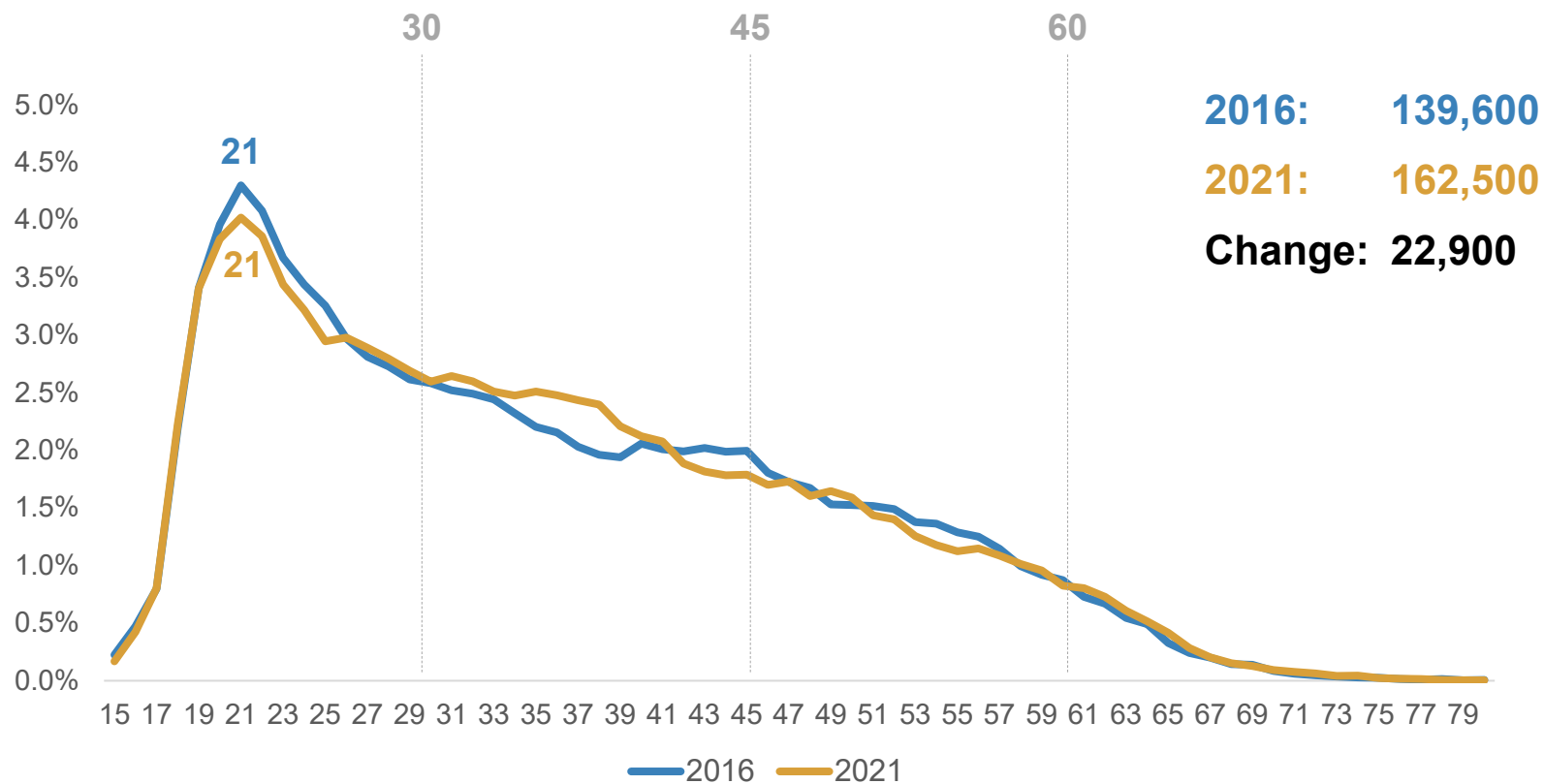
Top 4 care occupations in Australia at the 2021 Census and change between 2016 and 2021

Aged and disabled carers have flipped from 50s to 20s



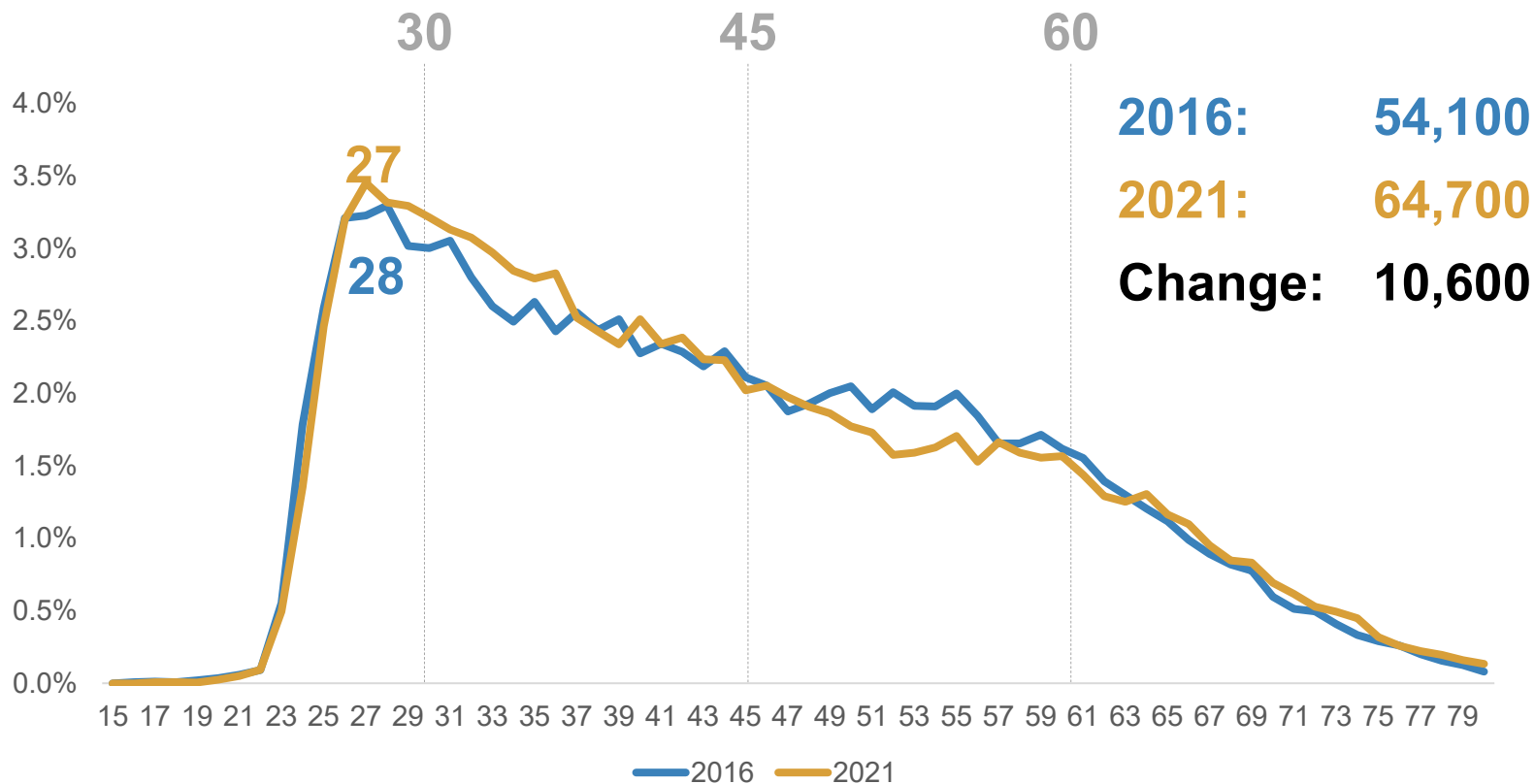
Percentage distribution by single year of age Aged or Disabled Carers in Australia, 2016 & 2021 censuses

Child carers peak at 21 and then trail off thereafter



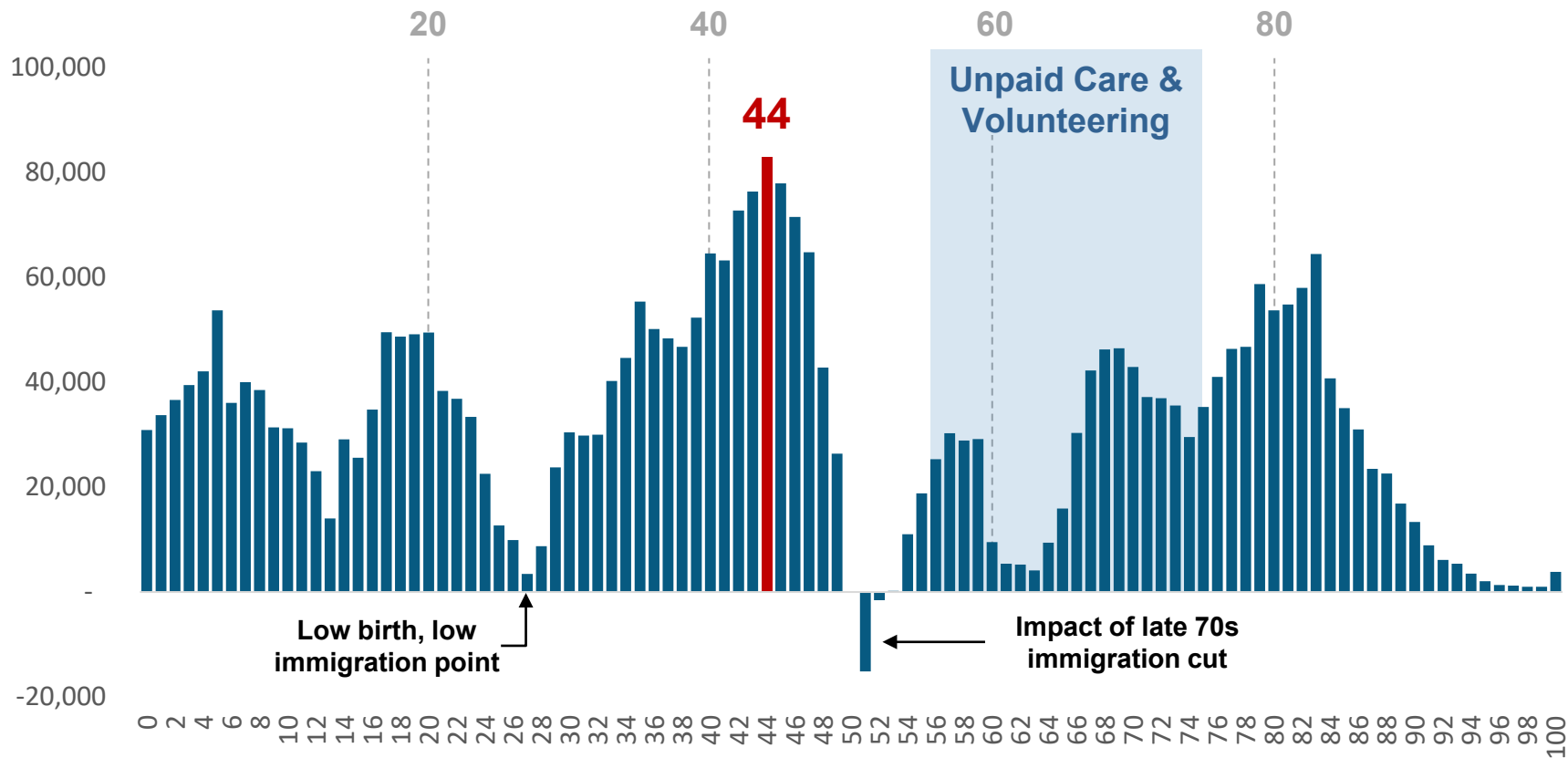
Percentage distribution by single year of age Child Carers in Australia, 2016 & 2021 censuses

Strong pipeline for GPs and Resident Medical Officers



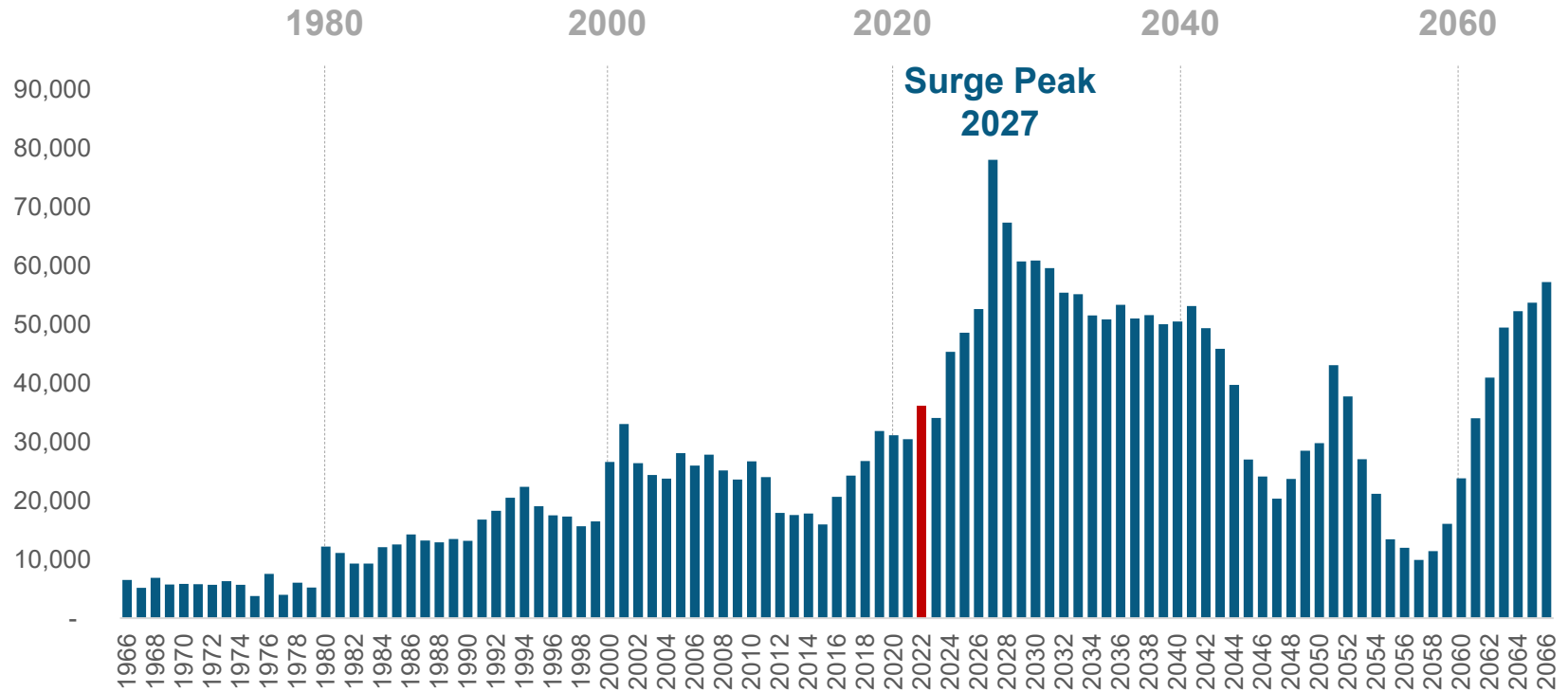
Percentage distribution by single year of age General Practitioners and Resident Medical Officers in Australia, 2016 & 2021 censuses

Millennials in their 40s will want rewarding (including 'meaningful') work



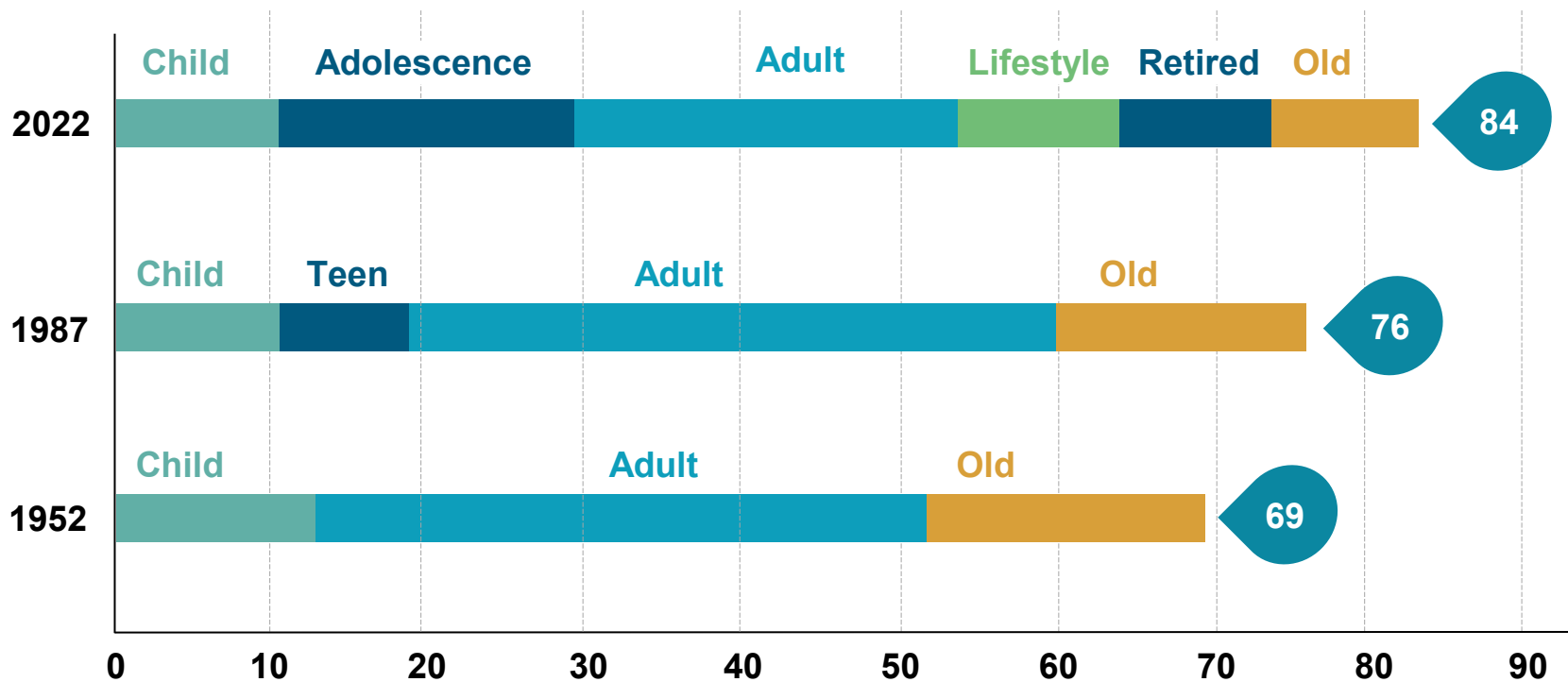
Net change in Australian population by single year of age 2022-2030

The demand for (80+) aged-care support peaks in the late 2020s



Net growth in the 80+ cohort for Australia, 1966-2066

Greater life expectancy is partly driving the big care shift



Change in life expectancy over 80 years in Australia

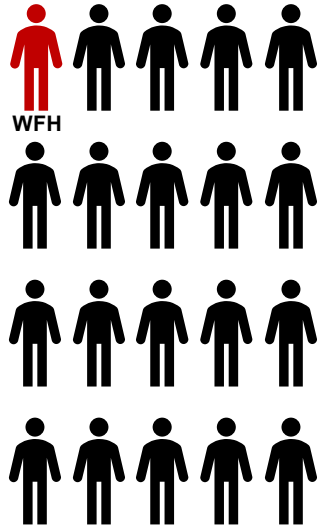
The pandemic has triggered the Great Appification of Australia



Selection of apps downloaded by Australians over the last decade

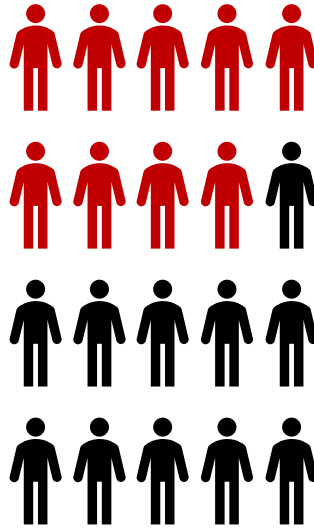
WFH builds the case for more support (care) in the family home

Before



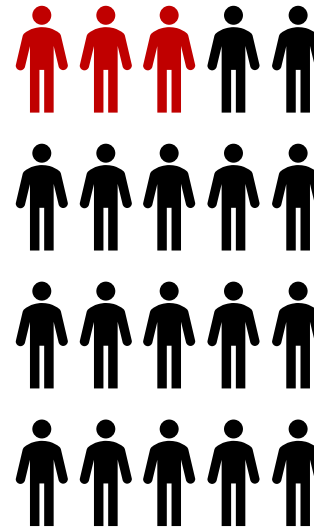
1996

Lockdown



2020

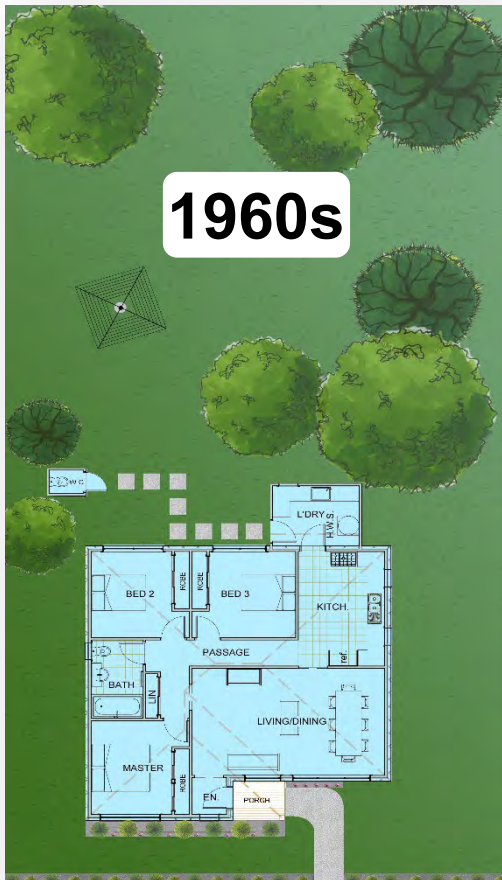
Post Covid



2022

AU
5%-21%

Work, study, shop, Telehealth, access care... all from home



Outlook for the big care shift in Queensland

1. Australians have high expectations



- Australia is a rich country in terms of GDP per capita... we have come to expect high standards in housing, in lifestyle, in workplaces
- Australians will continue to expect world's best practice in all forms of care

2. The care industry is on the move



- The 2021 census has been a watershed moment of the care industry... it has revealed a tectonic shift in the workforce towards aged, disability, child care, and more!
- The care industry delivers job opportunity in all parts of Australia at all levels

3. "Peak Retiree" arrives late 2020s



- The baby bust is diminishing the workforce at a time when more care workers are required to support the aged, the disabled and others
- We need to get greater productivity per workers perhaps through digitisation and in-home services

4. The workforce is upskilling



- There has been a seismic shift in the age base of aged or disabled workers
- This is thought to be connected with the certification of skills required
- The care workforce is upskilling over time

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