TAILORED HR SOLUTIONS

Toowoomba Region Environmental and Labour Market Scan

June 2023

Prepared for:

Regional Development Australia
DARLING DOWNS AND SOUTH WEST INC

TAILORED HR SOLUTIONS

Contents

Part 1 - Introduction	**3**
Executive Summary	4
Key Insights and Opportunities	5
Part 2 – Environmental Scan	**8**
Region and Industry Profile	9
Region Employment and Workforce Profile	15
Macro Drivers of Change	18
Industries to Watch	26
Part 3 – Education and Training Industry Analysis	**29**
Education and Training Industry Profile	31
Macro Drivers of Change	34
Macro Drivers impacting the state	34
Macro Drivers impacting the university sector	35
Macro Drivers impacting the primary and secondary school sector	36
Part 4 – Education and Training Industry Occupational Analysis	**37**
Occupation Profiles in Focus	38
Labour Market Summary	39
Occupation Criticality Assessment	40
Part 5 – Appendices and References	**41**

Part 1 – Introduction

This section provides an executive summary of key findings, and an overview of our approach and purpose

Executive Summary

This report was commissioned by Regional Development Australia – Darling Downs and South West and provides valuable insights and opportunities for the Toowoomba Region and specifically the Education and Training Sector (Early-Learning, Primary and High school, Vocational Education and Training (VET) and Tertiary institutions). The report presents an environmental scan for the Toowoomba Region, analysis of the Toowoomba region labour market, and provides an in-depth scan of factors impacting the Education and Training sector for the region. It also identifies other high-impact industries in the region that will benefit from similar analysis.

The research approach commenced with a comprehensive literature review, delving into a macro-level perspective that encompassed diverse industries and both local and global contexts. Drawing from this external research, analysis and synthesis was undertaken, leading to the identification of several key themes and insights. This analysis has also highlighted an opportunity to enhance its findings through an 'internal' sector-specific workforce analysis, specifically aimed at identifying targeted strategies to mitigate significant workforce risks and foster future talent pipelines for the Education and Training Sector in the Toowoomba Region.

One of the key technological macro drivers of change in the Toowoomba SA4 region is the widespread adoption of digital technologies and the increasing connectivity of the region. This is evident in the way businesses are using digital platforms and online tools to streamline their operations and connect with customers. The development of new technologies and innovations in industries such as agriculture and manufacturing is also a major driver of change. These industries are using new technologies such as automation, drones, and robotics to increase efficiency, reduce costs, and improve productivity.

Approach and purpose

The approach for the project was to conduct an environmental scan, analysis of the Toowoomba region labour market, and an in-depth scan of factors impacting the Education and Training sector for the region, as well as identifying other high impact industries in the region that will benefit from similar analysis. The outputs of this research culminate in this report, which will inform workforce planning and labour market initiatives for the Region.

The report includes the identification of several opportunities for consideration. These opportunities are illustrated throughout the report, providing valuable insights that may be used to inform future strategic workforce planning and labour market initiatives across the region.

Key Insights and Opportunities (1/3)

The Toowoomba region has experienced a significant increase in population, with a rise of 11,148 individuals from the previous census. This growth is accompanied by a greater representation of First Nations people, comprising 5% of the population in Toowoomba compared to the national average of 3.2%. However, despite this diversity, Toowoomba's cultural makeup remains relatively homogeneous when compared to Queensland and Australia as a whole. The key insights summarised below are presented and expanded upon in this report:

Economic Diversification And Growth

- Toowoomba's strategic location and region-shaping projects are expected to contribute to economic diversification and employment growth.
- Major projects like the Melbourne to Brisbane inland rail, Toowoomba Wellcamp Airport, and new Toowoomba Hospital are anticipated to create job opportunities.
- The Health Care and Social Assistance sector is the largest employer in Toowoomba, generating 14,989 local jobs in 2020/21.
- The Education and Training sector is the second-largest employer, employing 9,714 people.
- Over the past decade, the Health Care and Social Assistance industry has experienced the largest increase in employment, adding 2,950 jobs.
- Manufacturing and Education and Training industries also saw significant job growth, adding 1,220 and 789 jobs, respectively.
- Industries such as Social Assistance Services, Preschool and School Education, Hospitals, Professional, Scientific and Technical Services, and Construction Services are expected to witness significant growth in workers between 2021 and 2051.

Regional Development Initiatives

- Government policies and initiatives have been crucial in driving economic growth in the Toowoomba region.
- The Australian Government and Queensland State Government have implemented programs like Regional Jobs and Investment Packages, Export Market Development Grants, and Small Business Support to support regional development.
- The Queensland State Government offers initiatives such as Accelerate Small Business Grants, and Skilling Queenslanders for Work.
- These programs are designed to create jobs, support businesses, attract investment, and promote innovation in the region.

Key Economic Drivers

- Toowoomba's economy is driven by agriculture and retail trade.
- The Agriculture industry, supported by favourable conditions and advanced technologies, is a major contributor to economic value and jobs in the region.
- In 2020/21, the Agriculture industry supported 4,444 jobs in Toowoomba, accounting for more than 1 in 20 jobs, which is 50% higher than the state average.
- Health Care is the largest industry in Toowoomba and makes a significant contribution to employment and the region's economy.
- Approximately 17.7% of local workers are employed in the Health Care and Social Assistance sector.
- Education and Training, through universities and vocational providers, also play a significant role in Toowoomba's economy.
- Infrastructure development, particularly in transportation and energy sectors, promotes economic growth and prosperity in the region.

Environmental and Social Considerations

- The Toowoomba region faces challenges related to natural disasters, environmental impacts, population growth, and cultural diversity.
- Natural disasters such as floods and droughts can have a significant impact on the local economy in the region.
- Agriculture and Manufacturing industries, while important for the economy, also have significant impacts on the environment.
- Government policies aim to mitigate these challenges, promote sustainable practices, and protect natural resources.
- The increasing cultural diversity resulting from immigration has both positive and negative effects on social cohesion, economic growth, and community integration.
- Indigenous rights require consideration and protection in the face of urban, agricultural, and industrial expansion.
- The legal framework governing economic development ensures sustainability, equity, and protection of natural resources and citizen rights.

Key Insights and Opportunities (2/3)

The Toowoomba Education and Training industry represents 10.5% of the workforce, which is more than the national rate of approximately 8.4% of workers. The jobs to workers ratio is 1.06 to 1, which means that there are more jobs than people in Toowoomba.

EDUCATION AND TRAINING INDUSTRY

- There is a greater percentage of employment in the School Education sector and smaller representation of Adult Community and Other Education than is seen at a national level.
- The Toowoomba Region has experienced steady growth from 2015 to 2022, whereas Queensland experienced a decline from 2016 through to 2021 with a significant year-on-year change from 2021 to 2022.
- Most workers in this industry are formally qualified, with 62% having a university qualification and 20% having a VET qualification.
- Employment in the Education and Training industry is expected to increase by 149,600 (or 13.4%) nationally over the five years leading up to November 2026.
- This growth is driven by factors such as the return of international students, a larger school-aged population, and growing demand for adult and community education.
- Government policies, including reforms to the education sector, have played a significant role in shaping the education and training industry in the region.
- The increased use of education technology (edtech), such as virtual learning environments and AI learning tools, has driven changes and continues to drive change and regulation challenges for the sector.
- The population growth in the Toowoomba region, along with post-COVID relaxation of travel and migration restrictions, has led to increased demand for educational facilities and services.
- Additionally, the influx of retirees generates a need for more caring roles that require qualifications.

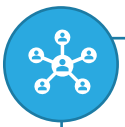
Key Insights and Opportunities (3/3)

This report was commissioned by Regional Development Australia - Darling Downs and South West with particular focus on the Education and Training Sector. However, through the Region Environmental Scan and subsequent analysis, it is evident that an opportunity exists for cross-sector collaboration of the future workforce needs of the Toowoomba Region. This collaboration should aim to establish a comprehensive understanding and strategic position on Toowoomba's current and future workforce needs, thereby enabling Toowoomba to effectively attract, develop, and retain the workforce necessary to support the region's economic and population growth.

Education and Training Sector

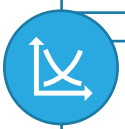
Recognising the diverse range of occupational roles within the Education and Training sector, there is an opportunity to conduct comprehensive sector-wide strategic workforce planning to ensure future demand is clearly articulated, understood and where possible strategies put in place to develop professionals across the Education and Training occupations.

High Impact Opportunities



Encourage collaboration and coordinated planning among educational institutions, government bodies, and industry stakeholders to effectively identify Education and Training industry and occupational challenges.

Undertake strategic workforce planning for the Toowoomba Region Education and Training Sector. This should include engagement with the various sub-sectors to understand their context, strategy, actual demand (current and future), supply, unique cultures, subsequent critical gaps and high impact risks to the future of the Sector and Occupations for Toowoomba.

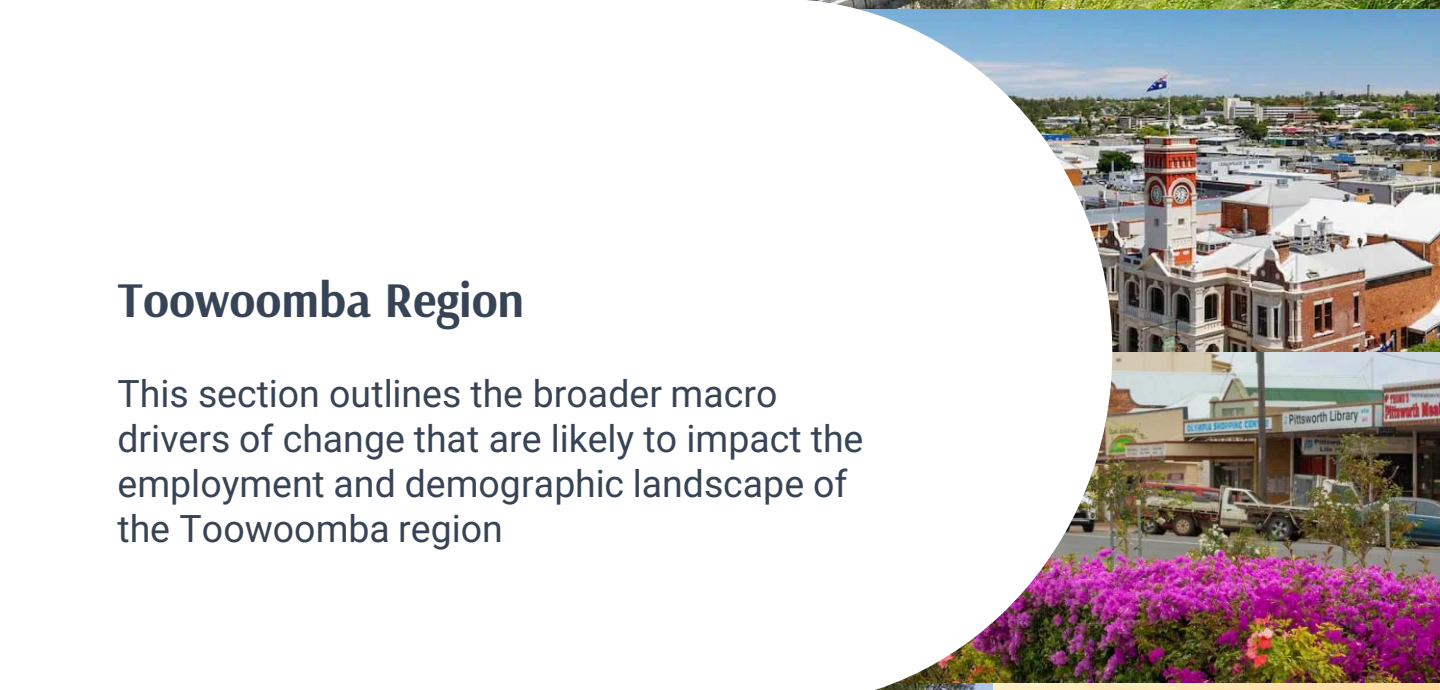


Address the demand and supply gap in critical occupations (as outlined in this report), e.g. VET occupations, Child Care Workers, and Early Childhood Teachers, to bridge the workforce shortage and meet the increasing demand for critical Education and Training occupations.

Focus on workforce development initiatives targeted at attracting individuals to careers in the Toowoomba Education and Training sector, establishing workforce pipelines and opportunities to build a sustainable and qualified workforce in critical areas – leveraging the trend of individuals moving to the region, to attract the desired future workforce.

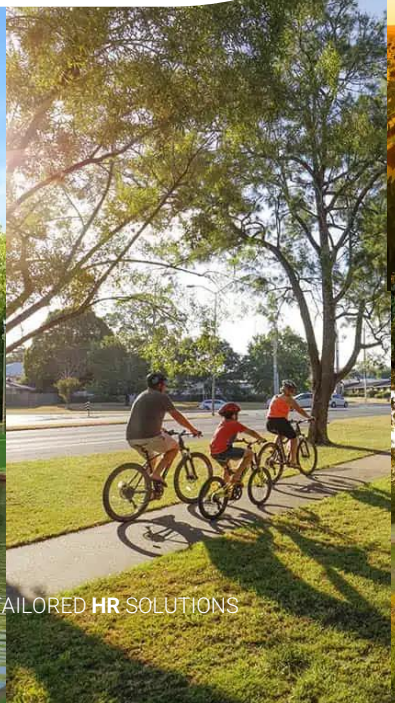
Part 2 – Environmental Scan

This section provides a high-level strategic analysis of the shifting demographic and employment landscape in the Toowoomba region



Toowoomba Region

This section outlines the broader macro drivers of change that are likely to impact the employment and demographic landscape of the Toowoomba region



Toowoomba Region and Industry Profile

The Toowoomba Region Snapshot

The Toowoomba Region contributes to 3.13% of the state's Gross State Product (GSP) and has experienced a growth in population of 11,148 people across a 5-year period to 2021. The region has a population with a relatively homogeneous cultural makeup compared to the state or national profile.

Population

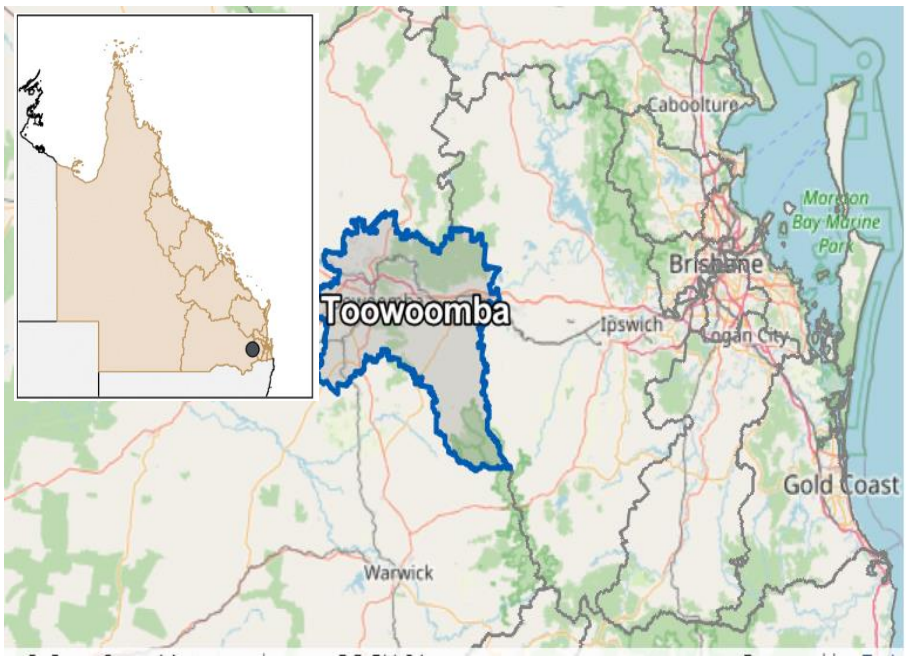
175,316

▲ by 11,148 from previous 2016 census.

Gross Regional Product (GRP)

$11.74 billion

(3.13% of the state's GSP)



First Nations population

5.0% ▲

Regional Queensland	6.1% ▲
Queensland	4.6% ▲
Australia	3.2% ◀▶

Overseas born

14% ▲ (2.2%)

Regional Queensland	18% ▲
Queensland	23% ▲
Australia	28% ▲

Language at home other than English

9% ▲ (2.5%)

Regional Queensland	9% ▲
Queensland	13% ▲
Australia	22% ▲

Land area

12,973m²

Median age

39 ▲

Regional Queensland	41 ▲
Queensland	38 ▲
Australia	38 ◀▶

Homeless persons

878 ▲ (385)

2021 estimate

SEIFA index of disadvantage 2016

989

Regional Queensland	981 ▲
Queensland	996 ▲
Australia	1002 ▲

Population density

13.51

persons per sq. km

Local businesses

16,059

Median weekly household income

$1,470 ▲

Regional Queensland	$1,494 ▲
Queensland	$1,637 ▲
Australia	$1,740 ◀▶

Median weekly rent

$300 ▲

Regional Queensland	$345 ▲
Queensland	$365 ▲
Australia	$380 ▲

Legend:

◀▶ No significant change since previous census (less than +/-0.5%)

▲ Increased since previous census

▼ Decreased since previous census

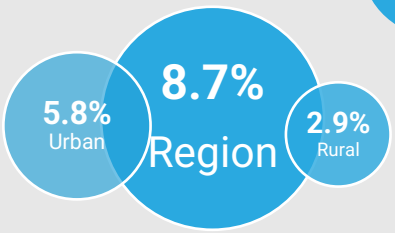
Sourced from Toowoomba Regional Council Community and Economic Profiles, id.community, 2021 census compared to 2016 census.

The Toowoomba Region Snapshot

Due to Toowoomba's strategic location and catalysing region-shaping projects, the Region's economy is expected to be diverse and include growth in employment not only to serve the strong population growth, but also the expansion of existing and new industries.

Population growth

Population in the Toowoomba Region is expected to increase by **8.7 per cent to 185,048 people** by 2026. The growth rate is expected to be **higher** in urban Toowoomba (5.8%) than rural Toowoomba (2.9%) over this period.



Major Projects

Significant region-shaping infrastructure projects being delivered within the Toowoomba Region that provide various land use, economic and other opportunities and present significant drivers for population and employment growth.

- Melbourne to Brisbane Inland Rail
- Second Toowoomba Hospital Campus
- Toowoomba Trade Gateway
- New England Highway North-South Corridor
- Brisbane to Toowoomba Passenger Rail

Largest employer | **Health Care and Social Assistance**

Health Care and Social Assistance is the largest employer in Toowoomba, generating 14,989 local jobs in 2020/21, followed by the **Education and Training sector which employed 9,714 people in Toowoomba.** Between 2015/16 and 2021/21, Health Care and Social Assistance had the largest increase in employment (+2,950 jobs), followed by Manufacturing (+1,220) and Education and Training (+789 jobs)

Employment growth

Industry sectors anticipated to have the largest increase in workers between 2021 and 2051:

Industry Sector	Estimated Growth
Social Assistance Services	5,430
Preschool and School Education	**4,860**
Hospitals	4,310
Professional, Scientific and Technical Services	2,740
Construction Services	1,940

Sources: Toowoomba Region Growth Plan, Toowoomba Region, March 2023, Toowoomba Economic Profile, id.community.

The Toowoomba Region Futures

As part of preparing the new Planning Scheme, Toowoomba Regional Council is undertaking a study about Emerging and Location-Specific Industry (ELSI).

In the last decade, industry has seen many technological advances, such as the introduction of artificial intelligence and robotics, changes to production processes, shifting market demands and an increased focus on local production capabilities. As a result, any of the industries considered in the current planning scheme, will be quite different to the industries of the future.

The ELSI project seeks to ensure the Toowoomba Region can benefit from the economic input that high value industries will bring to the Region, by ensuring the new planning scheme:

- caters for new and emerging industries (AI, robotics, waste-to-energy, bio-tech, hydrogen, batteries, medical and pharmaceutical technologies, virtual reality etc.);
- addresses industries with special locational needs (co-location requirements with other industries, circular economies, clustered or symbiotic);
- ensures location-specific industries can be catered for (close to locations or resources like high pressure gas, airport, rail terminal, or those with land consumptive requirements i.e. vehicle testing facilities);
- provides best-practice approaches to facilitate and regulate industrial development;
- provides greater certainty in terms of preferred and acceptable uses, thresholds and levels of assessment;
- facilitates economic growth;
- leverages major infrastructure, like the Second Range Crossing, Wellcamp Airport and the future Inland Rail.

The study will also review the industry thresholds (the number of products manufactured, or the level of emissions produced). Thresholds can determine the level of assessment required for a particular industrial use (generally code or impact assessable). The thresholds need to be evaluated to determine what impacts on the surrounding area occur if the threshold is exceeded, and if those thresholds are still appropriate, considering technological advancements, improved processes, and automation.

Council has engaged consultants Ethos Urban to undertake this study. A further update will be provided in June 2023.

The Toowoomba Region Industry Snapshot

Dominant Industries in the Toowoomba Region

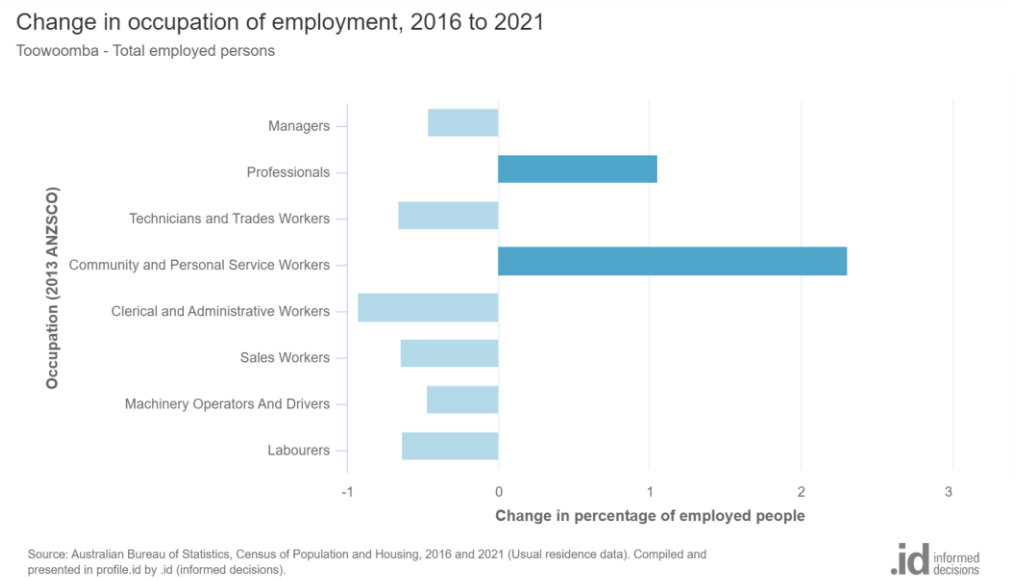
An analysis of the jobs held by the local workers in Toowoomba in 2020/21 shows the three largest industries were Health Care and Social Assistance (17.7%), Education and Training (11.5), and Retail Trade (10.1%). In combination, these three industries accounted for 33,209 people in total or 39.2% of the local workers.

Industry	Number of People	Percentage of Total Workforce
Health Care and Social Assistance	14,989	17.7%
Education and Training	9,714	11.5%
Retail Trade	8,505	10.1%
Total	33,208	39.3%

The table below presents the growth in the Toowoomba Region compared with the wider Queensland industry profile.

Industry	Queensland Percentage	Toowoomba Percentage	Comparative Indicator
1. Health Care and Social Assistance	14.4%	17.7%▲	**+3.3%**
2. Education and Training	9.1%	11.5% ▲	**+2.4%**
3. Retail Trade	9.5%	10.1%	+0.6%
4. Construction	9.3%	-7.2%▼	**-2.1%**
5. Agriculture, Forestry and Fishing	3.2%	5.3% ▲	**+2.1%**

Workers employed in Community and Personal Service occupations have increased significantly in the past five years.

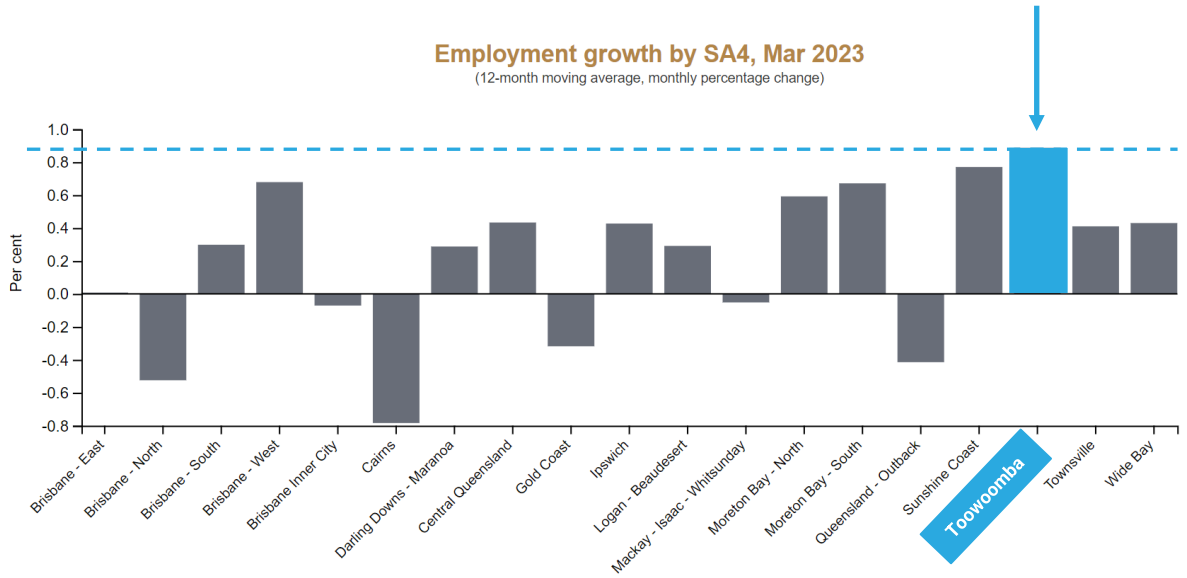


Source: Toowoomba Economic Profile, id.community.

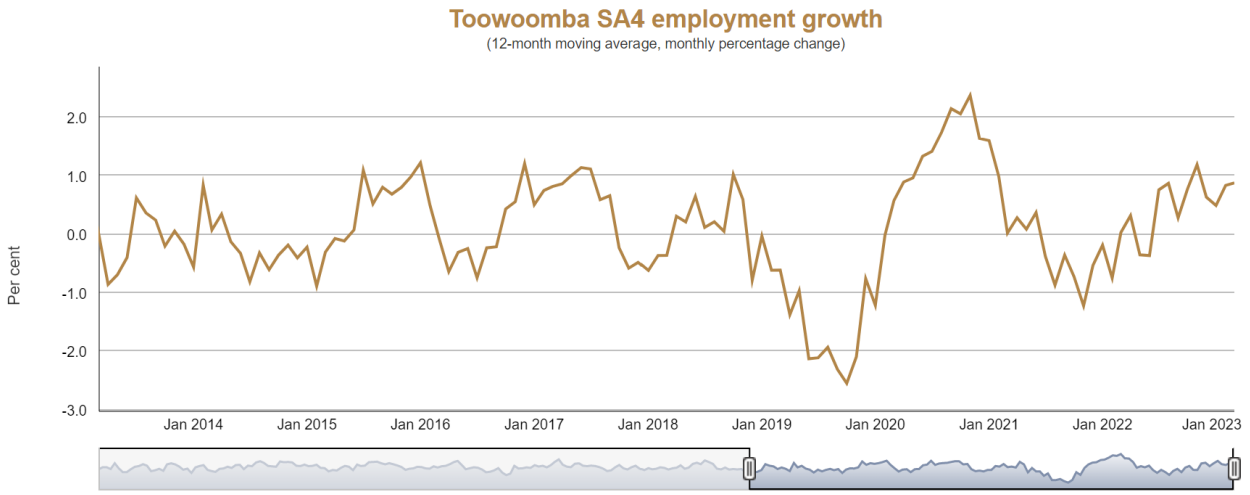
Toowoomba Region Employment and Workforce Profile

Toowoomba Employment Growth

Considering the employment trends in Queensland's SA4 regions, **Toowoomba has emerged as the frontrunner in terms of employment growth, surpassing other regions in Queensland.** With an average monthly growth rate of 0.9%, Toowoomba stands out as the largest contributor to the state's employment growth. It is likely that at least in part, Toowoomba's growth may be attributable to the multifaceted impact of the COVID-19 pandemic, for example, the trend of people opting to relocate to areas offering enhanced lifestyle opportunities.



Toowoomba Region Employment Growth Trend



Source: Toowoomba Economic Profile, id.community.

The Toowoomba Region Workforce Profile

Employed Residents

81,891

61%	33%	6%
Full-time	Part-time	Other

Local jobs

84,614

Median total personal income

$56,962 per year

Live and work in the area

90.5%

Work in the area, but live outside

9.5%

Participation rate (population in labour force)

60% ▲ (0.5%)

Regional Queensland	59% ◀▶
Queensland	62% ▲
Australia	61% ▲

Largest employing industry

Health Care and Social Assistance

Unemployment rate

5.0% ▼(-1.8%)

Regional Queensland	-5.2% ▼
Queensland	-5.4% ▼
Australia	-5.1% ▼

Post-school qualification

59.9%

Bachelor degree or higher	20.1%
Advanced diploma or diploma	8.8%
Certificate	23.4%

Gender split (working age)

47.5%	52.5%
Male	Female

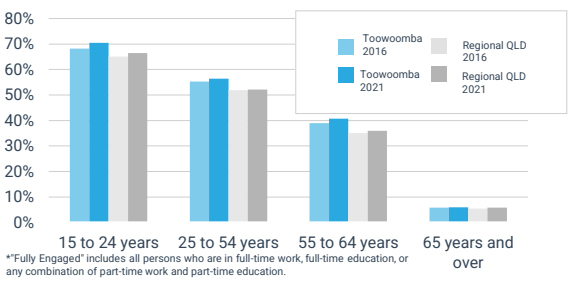
Top five occupation sub-major groups of employment:

1. Carers and Aides	7.5%
2. Health Professionals	6.8%
3. Sales Assistants and Salespersons	6.8%
4. Education Professionals	5.3%
5. Specialist Managers	4.7%

Method of travel to work

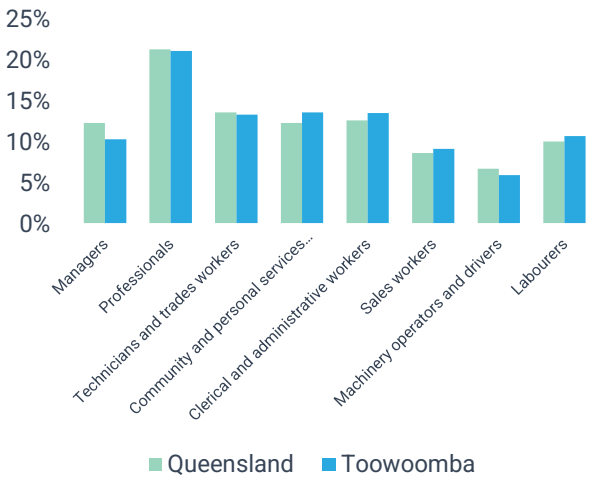
Car (77.5%)

Fully engaged* workforce by age



*"Fully Engaged" includes all persons who are in full-time work, full-time education, or any combination of part-time work and part-time education.

Major Occupation Distribution



Legend:

◀▶ No significant change since previous census (less than +/-0.5%)

▲ Increased since previous census

▼ Decreased since previous census

Sourced from Toowoomba Regional Council Community and Economic Profiles, id.community, 2021 census compared to 2016 census.

Toowoomba Macro Drivers of Change

Macro drivers of change

There are a number of macro drivers of change impacting the Toowoomba Region, its population, industries within the Region, the employment market and workforce. A summary of the key drivers of change is outlined below:

Political

Government policies and initiatives have played a significant role in shaping economic growth in the Toowoomba SA4 region. The Australian Government and Queensland State Government have implemented various programs to support regional development. These include Regional Jobs and Investment Packages, Export Market Development Grants, Research and Development Tax Incentives, Investment Attraction Incentives, and Small Business Support. The Queensland State Government also offers initiatives like Accelerate Small Business Grants, Advance Queensland Initiative, Trade and Investment Queensland support, and Skilling Queenslanders for Work. These programs aim to create jobs, support businesses, attract investment, promote innovation, and provide training and employment opportunities in the region.

Economic

The region's economy is primarily driven by agriculture and retail trade. Agriculture, as the largest economic contributor to the region benefits from favourable conditions and advanced technologies. Health Care is growing due to demand and advanced medical technologies. Education and Training contribute through universities and vocational providers. Infrastructure development, including transportation and energy, promotes economic growth. These drivers shape the prosperity of the region.

Sociocultural

The population in the Toowoomba region is growing at a higher rate than the Queensland average, driven by migration and an ageing population, which is leading to increased demand for housing, health care services, and educational facilities. The ageing population poses challenges for the workforce, health care, and social services. A lower proportion of residents with tertiary education may affect the region's ability to attract and retain skilled workers and impact economic growth. The increasing cultural diversity due to immigration has both positive and negative effects on social cohesion, economic growth, and community integration.

Technological

The widespread adoption of digital technologies and increased connectivity are transforming businesses and operations. The region has been investing in technological advancements, particularly in the fields of agriculture which is enhancing efficiency and productivity. Ethos Urban is conducting an in-depth study on these technological drivers, emphasising digital infrastructure, smart transport, agricultural technology, and renewable energy as part of plans underway to attract and build technology-led industries in the region.

Environmental

The region is susceptible to natural disasters, such as floods and droughts, which can have a significant impact on the local economy. Agriculture and Manufacturing industries have significant impacts on the environment. Government policies aim to mitigate these challenges and promote sustainable practices. Population growth and urbanisation increase demand for resources and infrastructure, impacting the environment. Natural resource usage, including water, land, and soil, is crucial for the region's economy but faces pressure from various factors, including climate change.

Legal

Climate change regulations aim to promote sustainable practices and mitigate the impacts of natural disasters.
Indigenous rights require consideration and protection in the face of urban, agricultural, and industrial expansion. The legal framework governing economic development ensures sustainability, equity, and protection of natural resources and citizen rights.

Political and regulatory drivers

Government policies have played a major role in shaping economic growth in the Toowoomba SA4 region:

Regional Jobs and Investment Packages: The Australian Government has allocated funding for Regional Jobs and Investment Packages, which aim to support economic growth and create jobs in regional areas such as Toowoomba. These packages provide funding for infrastructure projects, business development, and job creation initiatives.

Export Market Development Grants: The Australian Government provides support to businesses in the Toowoomba SA4 region that are looking to export their products or services. This support includes Export Market Development Grants, which provide funding to help businesses develop new export markets and promote their products overseas.

Research and Development Tax Incentives: The Australian Government offers tax incentives for businesses in the Toowoomba SA4 region that invest in research and development activities. These incentives can help businesses to develop new products and services, increase productivity, and create jobs.

Investment Attraction Incentives: The Australian Government offers a range of incentives to attract foreign investment to the Toowoomba SA4 region. These incentives include tax concessions, funding support, and streamlined visa processes for foreign investors.

Small Business Support: The Australian Government provides a range of support services for small businesses in the Toowoomba SA4 region, including funding support, mentorship programs, and assistance with business planning and development.

The Queensland State Government promotes economic growth in the Toowoomba SA4 region through:

Regional Jobs and Investment Packages: The Queensland State Government provides funding through the Regional Jobs and Investment Packages to support local businesses and create employment opportunities in regions such as Toowoomba SA4.

Accelerate Small Business Grants: The Queensland government provides funding to small businesses to help them improve their capability and capacity for growth and expansion.

Advanced Queensland Initiative: This initiative is designed to facilitate innovation and growth in Queensland by providing funding for research and development, commercialisation, and innovation-led collaboration between businesses, entrepreneurs, and researchers.

Trade and Investment Queensland: This State Government body provides support to businesses looking to enter new markets, expand their export basis or invest in Queensland.

Skilling Queenslanders for Work: The Queensland Government has invested heavily in the education sector, with the Skilling Queenslanders for Work program providing funding for training and employment programs in the region.

Economic drivers

Agriculture
Agriculture is the largest industry in terms of economic contribution to the Toowoomba SA4 region, with a significant amount of land dedicated to farming. Known as a food bowl of Australia, this region produces and exports high quality grain, cotton, beef, lamb, and other agricultural products. The region's agriculture sector is supported by excellent soil and climatic conditions, enabling farmers to produce crops all year round. The key economic drivers in this sector are the adoption of advanced technologies, efficient use of water and energy, and the availability of skilled labour.

Health Care
Health Care and Social Assistance is the largest employer in Toowoomba, and continues to be a growing industry in the region, with several hospitals, medical clinics, and aged care facilities located in Toowoomba and surrounding areas. The health care sector is one of the fastest growing sectors in the region. The region boasts of excellent health care facilities and highly skilled medical professionals. The sector is driven by the increasing demand for health care services, the ageing population, and the adoption of advanced medical technologies.

Education and Training
Education and Training is the second largest employing industry in the region, employing 11.5% of the workforce and is forecast to continue to grow, with several universities, TAFEs, and vocational education and training providers located in Toowoomba and surrounding areas. The education and training industry generates around $650 million in gross regional product annually. It is also a major driver of non-resident exports, with international education and training exports accounting for around $72 million in 2018-19.

Infrastructure
Infrastructure development is another critical macro driver shaping economic development in the Toowoomba SA4 region. The federal, state and local governments have invested heavily in infrastructure development, including transportation, communication, energy, and water resources. For instance, the construction of the Toowoomba bypass has provided a better road network, which has improved access to the region, thus promoting economic development.

Sociocultural drivers

Some of the key social factors affecting change in the Toowoomba SA4 region are:

Population Growth: According to the Australian Bureau of Statistics, the population of Toowoomba SA4 region has grown at an average annual rate of 1.4% between 2018 – 2022. This growth rate is higher than the regional Queensland average of 1.02%. The population in the region is projected to continue growing due to factors such as migration, natural increase, and an ageing population.

Ageing population: The Toowoomba SA4 region has a higher proportion of older residents as compared to the rest of Queensland. This demographic trend may have an impact on the region's workforce, health care, and social services.

Education: The Toowoomba SA4 region has a lower proportion of residents with a tertiary education qualification as compared to the Queensland average. This could impact the region's ability to attract and retain skilled workers and might affect its economic growth.

Cultural Diversity: The Toowoomba SA4 region is becoming more culturally diverse due to immigration. This can have positive and negative effects on the region's social cohesion, economic growth, and community integration.

Source: Australian Bureau of Statistics, Regional Population Growth, Australia

Technological drivers

One of the key technological macro drivers of change in the Toowoomba SA4 region is the widespread adoption of digital technologies and the increasing connectivity of the region. This is evident in the way businesses are using digital platforms and online tools to streamline their operations and connect with customers. Additionally, the proliferation of high-speed internet and the rise of the gig economy are also contributing to the growth of the region.

Another major technological macro driver of change in the Toowoomba SA4 region is the development of new technologies and innovations in industries such as agriculture and manufacturing. These industries are using new technologies such as automation, drones, and robotics to increase efficiency, reduce costs, and improve productivity.

Ethos Urban is one of the key organisations that are conducting in-depth studies on the technological macro drivers of change in the Toowoomba SA4 region. The ongoing Emerging and Location-specific study being conducted by Ethos Urban is aimed at providing a detailed understanding of the technological changes happening in the region and how they are affecting the industries and businesses operating there. Based on the emerging results study (due to be released in June 2023), some of the key technological macro drivers of change in the Toowoomba SA4 region include:

Digital Infrastructure: The study highlights the significance of digital infrastructure as a key driver of change in the region. The implementation of high-speed broadband and other digital technologies has improved the digital connectivity of the region, resulting in increased business competitiveness and economic growth.

Smart Transport: The study also highlights the importance of smart transport systems in driving change in the Toowoomba SA4 region. The implementation of smart transport systems has improved traffic management, reduced congestion, and improved access to public transport.

Agricultural Technology: The Toowoomba SA4 region is renowned for its agricultural sector, and the study highlights the increasing use of agricultural technology as a key driver of change. This includes the adoption of precision farming techniques, including using sensors, drones, and other tools to collect and analyse data on soil and crop conditions. This technology can help farmers optimise their operations by minimising input costs, improving yields, and reducing waste.

Renewable Energy: Toowoomba is also experiencing an increasing shift towards renewable energy sources, including solar, wind, and biomass energy. This is partly due to the region's high levels of sun exposure and wind speed.

Environmental drivers

Industrial
Agriculture and Manufacturing industries are major contributors to environmental challenges faced by the region, which are then subject to mitigations through environmental policies and regulations implemented by local, state and federal governments.

These interventions have flow-on effects in the costs and operations of companies in these industries, often leading to innovations in more sustainable practices.

Population Growth
According to recent census data, the Toowoomba SA4 region has experienced steady population growth over the past few years. The population of the region was 155,473 in 2011, and increased to 175,316 in 2021 census, an increase of approximately 12.8% over 10 years. The population growth trend is expected to continue in the future due to various factors such as the availability of job opportunities, the growth of the education sector, and the region's attractive lifestyle. As the population grows, there will be increased demand for housing, infrastructure, and services, which may lead to increased pressure on the environment.

Urbanisation
The Toowoomba SA4 region has also experienced significant urbanisation over the past few years. The region has been expanding rapidly, and urbanisation rates have been high in many areas. The urbanisation trend is expected to continue in the future as more people are attracted to the region's lifestyle. The expansion of urban areas can have significant impacts on the environment, such as increased demand for natural resources, land use changes, and increased pollution levels.

Natural Resource Usage
The Toowoomba SA4 region is an agricultural area, and natural resources such as water, land, and soil are essential for the region's economy and livelihoods. The region is known for its high agricultural productivity, and the use of natural resources is an integral part of the region's economy. However, the region's natural resources are under pressure due to a variety of factors, including population growth, urbanisation, and climate change. Climate change is a significant threat to the region's natural resources, with periods of drought and flood impacting the productivity of natural resources.

Legal drivers

There are several significant legal macro drivers of change that will impact the region. These include:

Climate change: The Toowoomba SA4 region, like many other regions across the globe, is facing the impacts of climate change. These impacts include increased frequency and severity of natural disasters such as flooding, bushfires, and droughts. Federal and state interventions and regulations aim to encourage and support industries and organisations shift towards more sustainable practices, for example Queensland Government's 50% Renewable Energy Target by 2030.

Indigenous rights: The Toowoomba SA4 region is home to several Indigenous communities with unique cultural and legal systems. On 9 September 2000, Matt Foley, the Queensland Attorney-General, ceremoniously returned to the Wakka Wakka, Warra and Jarowair people the ownership of the initiation site of the Meringandan Aboriginal Reserve. Urban, agricultural and industrial expansion and development of the Toowoomba region must consider and ensure that Indigenous rights are protected and respected.

Economic development: The Toowoomba SA4 region is undergoing rapid economic development, particularly in the areas of agriculture and tourism. The legal framework governing the region must ensure that this development is sustainable and equitable, and that it does not come at the cost of the region's natural resources or the rights of its citizens.

Social justice: The Toowoomba SA4 region, like many other regions in Australia, faces ongoing social justice issues, including the need to tackle growing youth crime rates, poverty, inequality, and discrimination. The legal framework governing the region must address these issues and ensure that all citizens have access to justice and equal protection under the law.

Industries to Watch

Health Care and Social Assistance

Agriculture, Forestry and Fishing

Industries to Watch

Health Care and Social Assistance

The Toowoomba Region Health Care and Social Assistance industry plays a crucial role in supporting the residents' health and well-being in the region and the wider Darling Downs region. The Toowoomba region has developed and continues to develop health care facilities, expand its medical services, and provide a full spectrum of health care services.

The Health Care and Social Assistance industry in the Toowoomba region is the largest employer and the second largest contributor to Gross Regional Product.

In 2020/21, the industry supported 14,989 jobs or 17.7% of all jobs in Toowoomba, well above the Queensland average of 14.4%. In the same year, the industry generated $1,254 million in value added, accounting for 12.5% of the total region.

The Health Care and Social Assistance industry is one of the fastest growing industries in the Toowoomba region. With an increase of 4,865 jobs over the past decade, the industry was the largest job creator in Toowoomba. During the same period, the industry value added increased by $551 million, the second largest growth industry in the region. The rate of growth continues to outperform the state.

Nationally, Health Care and Social Assistance is projected to make the largest contribution to employment growth to 2026 of 15.8%, driven by continued investment in public health care, ongoing demand generated by the NDIS, the ageing population and increasing demand for childcare.

2021/22 Industry Snapshot for Toowoomba

+78%
$1,254 million

VALUE ADDED
The economic contribution of Health Care and Social Assistance increased by $551 million over the last 10 years.

+48%
14,989 jobs

EMPLOYMENT
Health Care and Social Assistance was the largest employer in the region in 2020, employing 17.7% of the Toowoomba workforce.

+45%
1,031 businesses

BUSINESSES 2015-21
Health Care and Social Assistance has experienced the largest growth in business numbers in recent years (+324).

Note: 2016/17 to 2021/22 change.
Key source: Toowoomba Region Economic Profile 2022, id.community

Industries to Watch

Agriculture, Forestry and Fishing

The Toowoomba region has had a strong background in agriculture since the early days of settlement. Despite the economic growth and diversification into other industries over the years, the Agriculture industry today remains a major generator of economic value and jobs in the region.

In 2020/21, the Agriculture industry supported 4,444 jobs or more than 1 in 20 jobs in the region, 50% higher than the state average. In the same year, the industry contributed $504 million in Gross Regional Product and accounted for 5.9% of the total output in Toowoomba. The industry also has major flow-on impacts to the rest of the Toowoomba region's economy, supporting further jobs through supply chain linkages.

Toowoomba has a wealth of road, rail and air transport infrastructures, which provide the Agriculture industry access to domestic and international markets, and supporting growth of the industry.

The Agriculture industry's importance in the Queensland economy is highlighted by its large share of Queensland production across a number of commodities. In 2020/21, the industry accounted for 5.1% of the state's total value added.

2021/22 Industry Snapshot for Toowoomba

$504 million
+33%

VALUE ADDED
The estimated value of agricultural production commodities in 2021 was $998 million, only 3.2% lower than previous peak in 2018.

4,444 jobs
1 in 20 jobs

EMPLOYMENT
Jobs are anticipated to grow strongly due to major investment in research and innovation.

$489 million
36% of total industry output

EXPORT
Increase in domestic demand for agricultural products offset decreases in international export demand during COVID-19.

Note: 2016/17 to 2021/22 change.
Key source: Toowoomba Region Economic Profile 2022, id.community

Part 3 - Education and Training Industry

This section provides an overview of the Macro Drivers of Change impacting the Education and Training Industry and Toowoomba Region.

Education and Training Industry Analysis

This section highlights the impacts of the macro drivers of change in the Toowoomba region on the Education and Training Industry

Education and Training Industry Profile

National Industry Snapshot

1,164,800
EMPLOYED

8.4%
WORKFORCE SHARE

$1,299
WEEKLY EARNINGS

12.0%
PAST GROWTH

13.4%
FUTURE GROWTH TO 2026

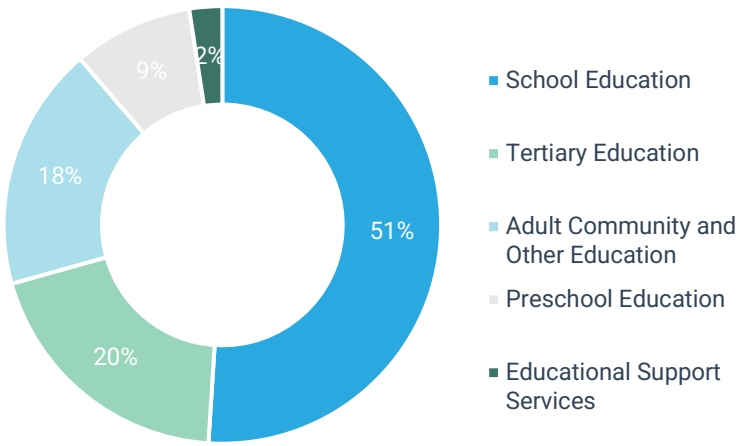
61.1%
FULL-TIME SHARE

72.3%
FEMALE SHARE

42
AVERAGE AGE

Education and Training is a large employing industry, representing approximately 8.4% of workers nationally. Most workers are formally qualified, with 62% having a university qualification and 20% having a VET qualification. Employment in Education and Training is projected to increase by 149,600 (or 13.4 per cent) over the five years to November 2026, as international students return and strong drivers of employment growth such as a larger school-aged population and growing demand for adult and community education continue.

Employment by sector, Education and Training



Top 10 Employing Occupations – Education and Training Industry

ANZSCO Code	Unit Group title	Employment (Australia)	Employment (Queensland)	% of Aus Unit Group
5311	General Clerks	288,700	64,842	22%
2412	Primary School Teachers	167,000	29,504	18%
2414	Secondary School Teachers	137,400	27,615	20%
4211	Child Carers	132,100	34,295	26%
4221	Education Aides	105,300	28,755	27%
2421	University Lecturers and Tutors	60,800	9,424	16%
2411	Early Childhood (Pre-primary School) Teachers	49,900	10,248	21%
2492	Private Tutors and Teachers	49,400	9,040	18%
4523	Sports Coaches, Instructors and Officials	48,200	8,339	17%
2422	Vocational Education Teachers	40,400	6,536	16%

Education and Training Industry Profile:
Toowoomba

SA4 Industry Snapshot

9,502
EMPLOYED

10.5%
WORKFORCE SHARE

$1,425
WEEKLY EARNINGS

10.9%
PAST GROWTH

13.4% (Aus)
FUTURE GROWTH TO 2026

33.4
AVG. WEEKLY HOURS

72.0%
FEMALE SHARE

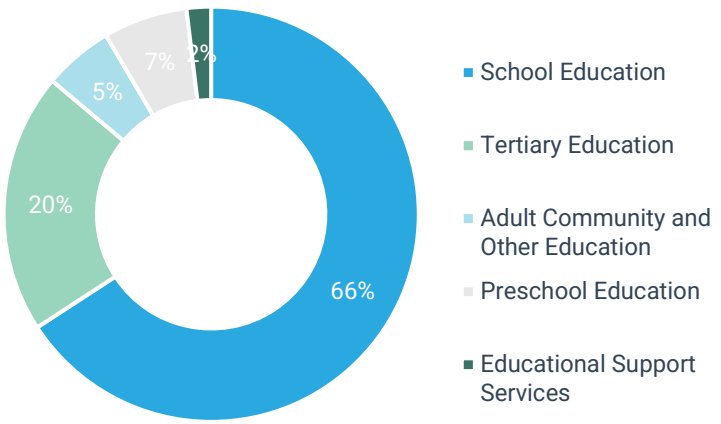
44
AVERAGE AGE

In Toowoomba, the Education and Training industry represents 10.5% of the workforce, which is more than the national rate of approximately 8.4% of workers nationally.

Of note, the jobs to workers ratio is 1.06 to 1, which means that there are more jobs than people.

There is a greater percentage of employment in the School Education sector and smaller representation of Adult Community and Other Education than is seen at a national level.

Toowoomba employment by sector, Education and Training

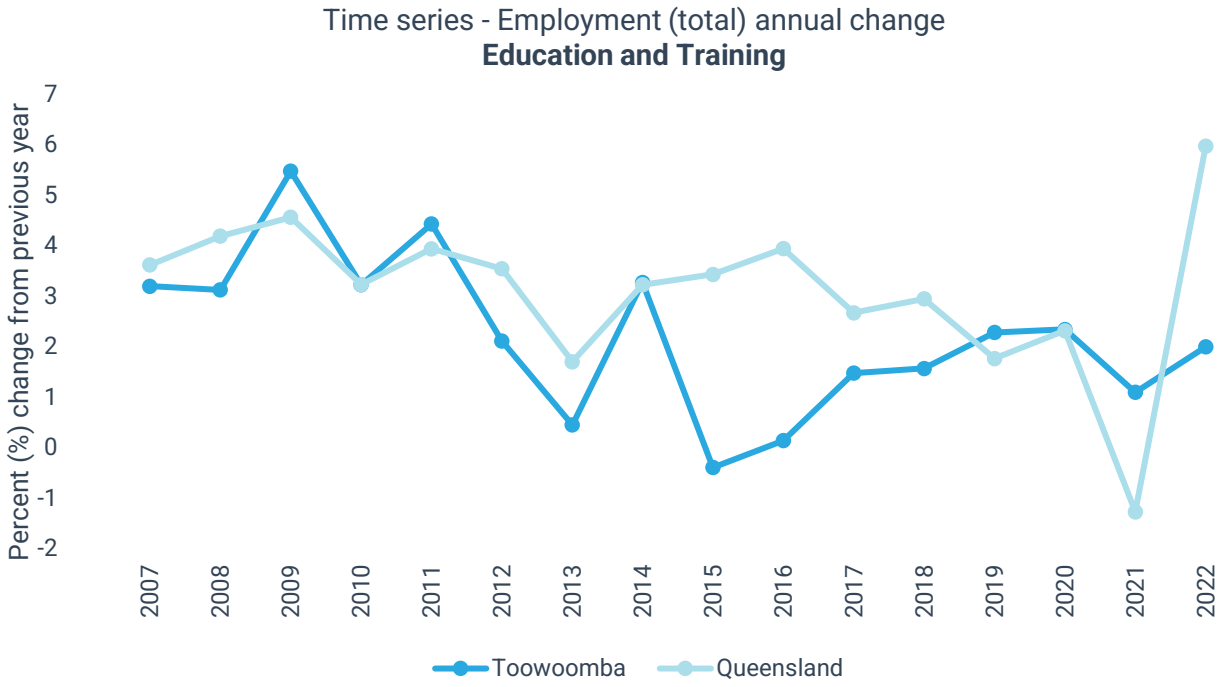


Top 10 Employing Occupations – Education and Training Industry

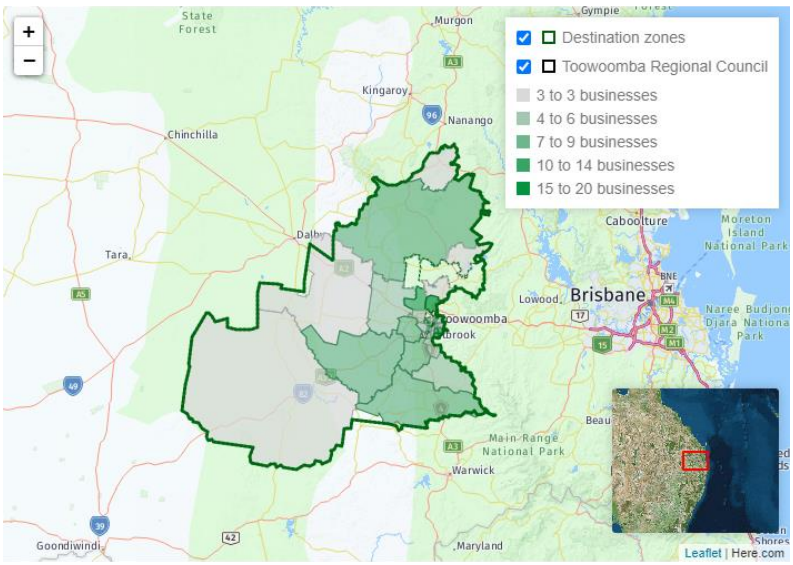
ANZSCO Code	Unit Group title	Employment (Australia)	Employment (Queensland)	Employment (Toowoomba)	% of QLD Unit Group
5311	General Clerks	288,700	64,842	1,897	2.9%
2412	Primary School Teachers	167,000	29,504	1,021	3.5%
2414	Secondary School Teachers	137,400	27,615	965	3.5%
4211	Child Carers	132,100	34,295	884	2.6%
4221	Education Aides	105,300	28,755	1,077	3.7%
2421	University Lecturers and Tutors	60,800	9,424	431	4.6%
2411	Early Childhood (Pre-primary School) Teachers	49,900	10,248	185	1.8%
2492	Private Tutors and Teachers	49,400	9,040	137	1.5%
4523	Sports Coaches, Instructors and Officials	48,200	8,339	170	2.0%
2422	Vocational Education Teachers	40,400	6,536	84	1.3%
	TOTALS:	**1,079,200**	**228,598**	**6,851**	**3.0%**

Education and Training Industry Profile

The table below outlines the growth in the Education and Training industry in the Toowoomba region compared with the wider Queensland industry profile. The Toowoomba region experienced steady growth from 2015 to 2022, whereas Queensland experienced a decline from 2016 through to 2021 with a significant year-on-year change from 2021 to 2022.



Number of registered Education and Training businesses, Toowoomba 2022



Toowoomba Regional Council - Education and Training Businesses	No.	%
Technical and Vocational Education and Training	63	25.6
Adult, Community and Other Education (not elsewhere classified)	54	22
Primary Education	45	18.3
Sports and Physical Recreation Instruction	30	12.2
Arts Education	21	8.5
Preschool Education	15	6.1
Secondary Education	8	3.3
Combined Primary and Secondary Education	7	2.8
Educational Support Services	3	1.2
Special School Education	0	0
Total	**246**	**100**

Macro drivers of change impacting the delivery of education and training to the state

The future of the Australian Education and Training industry will be impacted by global, political, economic, social and technological shifts that will impact and transform the way education services and solutions are provided. This environmental scan provides an overview of the broader macro drivers of change that are likely to impact the Education and Training industry in Australia and Regional Queensland and, in turn, shape the evolving future Education and Training workforce of Toowoomba.

Political / Government drivers

Reforms to the education sector, including the implementation of recommendations arising from the Report of the Quality Initial Teacher Education Review, will result in a number of initiatives to attract, retain and support teachers in their early career stages in support of the Australian Government's plan to return Australia to the top group of education nations by 2030.

Government policies have also played a major role in shaping the education and training industry in the region. The Queensland Government has invested heavily in the education sector, with initiatives such as the Skilling Queenslanders for Work program providing funding for training and employment programs in the region.

Economic drivers

The SEQ City Deal is a 20-year partnership between the Australian Government, Queensland Government and 11 Councils which make up the Council of Mayors (SEQ) which provides a shared commitment to transform SEQ and deliver region-shaping infrastructure. It will deliver a significant foundation investment of more than $1.8 billion that will generate thousands of local jobs, boost digital and transport connectivity, enhance liveability and support one of the fastest growing regions in the country.

Toowoomba will receive more than $38.48 million of funding to kickstart priority affordability, tourism and liveability projects across the region.

Technological drivers

Increased use of education technology (edtech) has been a significant driver of change in the Education and Training industry, affecting the way education is delivered and consumed.

Current trends in edtech being implemented in Toowoomba include virtual learning environments, adaptive learning, gamification, artificial intelligence learning tools and learning augmentation, and mobile learning.

AI and automation have also impacted the training industry in Toowoomba with several vocational training institutions integrating robotics and automation training into their course offerings.

Universities such as UniSQ have established AI Special Interest Groups to advance the integration and implementation of AI in business, conducting leading practice research, events, and providing training and educational development opportunities for students and business.

Technology also enables vertical expansion of delivery of education as well as sourcing of suitability qualified educators (e.g. greater market reach).

Sociocultural drivers

The population in the Toowoomba SA4 region is growing, which is leading to increased demand for housing, health care services, and educational facilities.

Post-COVID relaxation of travel and migration restrictions will see a return of migration, both permanent and temporary, including to study at university.

There is a large number of retirees moving to Toowoomba, which generates a need for greater caring roles, which require qualifications.

Population growth driven by investments in the Region and movement trends will see an increase in demand for services across the education and training sector.

Macro drivers of change impacting the University sector in Toowoomba

In addition to the broader macro drivers of change that will impact the Education and Training industry in Australia and Regional Queensland, the following drivers are influencing the university sector in Toowoomba:

Global competition:
Toowoomba's University of Southern Queensland is facing increasing competition from international universities. To remain competitive, universities are investing in research and innovation, enhancing the quality of their teaching, and developing strong international partnerships.

Digital transformation:
The use of digital technologies is transforming the way universities operate. This includes increased use of online teaching and learning platforms, as well as the integration of data analytics and artificial intelligence in decision making and teaching.

Changing student expectations:
Students are increasingly looking for more flexible and personalised learning experiences. This has led universities to develop new pedagogical approaches, such as blended learning and 'flipped' classrooms.

Industry partnerships:
Universities are increasingly collaborating with industry partners to develop programs that are aligned with industry needs. This includes developing work-integrated learning opportunities and engaging in research partnerships.

Funding pressures:
The university sector is facing funding pressures, with reduced government funding and increased competition for research grants. This is leading universities to explore alternative revenue streams, such as philanthropic donations, industry partnerships, and international student fees.

Regulatory changes:
The university sector is subject to regulatory changes, such as changes to visa requirements for international students and changes to funding models. Universities must adapt to these changes to remain viable and competitive.

Macro drivers of change impacting the Primary and Secondary education sector in Toowoomba

In addition to the broader macro drivers of change that will impact the Education and Training industry in Australia and Regional Queensland, the following drivers are influencing the Primary and Secondary education sector in Toowoomba:

Curriculum changes:
The Queensland Curriculum and Assessment Authority (QCAA) has introduced changes to the curriculum to reflect the changing needs of students and the workforce. This includes a focus on STEM (Science, Technology, Engineering and Mathematics) subjects and digital literacy skills.

Technological advancements:
Technology is increasingly being integrated into teaching and learning in primary and secondary schools, with the use of digital platforms and resources to enhance learning outcomes.

Assessment and reporting changes:
The QCAA has also introduced changes to the way student learning is assessed and reported, including the use of online assessment tools and a focus on formative assessment to support student learning.

Workforce development:
There is a need for highly qualified and skilled teachers to meet the changing needs of students and the workforce. The sector is focused on developing and retaining a skilled and diverse teaching workforce through professional development opportunities and support.

Funding pressures:
The education sector is facing funding pressures, with reduced government funding and increasing demands on schools to meet the needs of diverse student populations. This is leading to a focus on efficient resource allocation and the development of alternative revenue streams.

Student wellbeing:
There is growing recognition of the importance of student wellbeing in primary and secondary schools. Schools are increasingly incorporating social and emotional learning into their programs, providing pastoral care and support, and promoting positive school cultures.

Part 4 - Education and Training Industry Occupational Analysis

This section identifies the most critical occupations in the Education and Training industry, for the Toowoomba region, and provides occupation snapshot information for education and training roles

Education and Training Industry Profiles in Focus

The Education and Training industry occupation profile analysis provides a view of the occupations in the sector in critical demand. This analysis would benefit from complimentary analysis within the Education and Training sector to inform actual demand and supply as experienced within Early Learning, Primary and Secondary Schooling, VET, and Tertiary Education across the Toowoomba region. We have included below the critical occupations that would benefit from a priority focus for Toowoomba and the Education and Training industry.

Category 1 Critical Occupations:
These occupations are **currently experiencing a labour market shortage** in Queensland, have a **strong or moderate future demand** nationally, and a **national growth rating**, e.g. expected increase in number of jobs of **Very Strong** (>15%), **Strong** (8% to 14.9%) or **Moderate** (3% to 7.9% growth):

- Child Care Workers
- Early Childhood (Pre-primary School) Teachers
- Primary School Teachers
- Secondary School Teachers
- Special Needs Teachers
- Teachers of the Hearing Impaired
- Teachers of the Sight Impaired
- Other Special Education Teachers
- Vocational Education Teachers

This report includes labour market profiles for all occupations. The labour market profiles for Child Care Workers and Early Childhood Teachers in Toowoomba reveal a decline in reported demand across 1 and 5 years. However, this decrease is unlikely to be attributed to a reduced demand for these occupations; rather, it can be attributed to a lack of available workforce supply. This shortage, coupled with the criticality of VET occupations and reported decreased demand, raises concerns about the development of a career pipeline for Early Childhood educators through the VET sector, which serves as the primary qualifying body for this profession.

Category 2 Critical Occupations:
These occupations are *not* currently experiencing a labour market shortage in Queensland, but do **have a strong or moderate future demand nationally, and a national growth rating** (e.g. expected increase in number of jobs) of **Very Strong** (>15%), **Strong** (8% to 14.9%) or **Moderate** (3% to 7.9% growth):

- Education Advisers and Reviewers
- Middle School Teachers
- Regional Education Managers
- School Principals
- Education Aides
- University Faculty Heads
- Private Tutors and Teachers (e.g. arts, private)
- University Lecturers and Tutors

Please note, the summary level data is only available at the Queensland State level, however the detailed labour market profiles included within this report, present the information for Toowoomba where publicly available.

Labour Market Summary: Education and Training

ANZSCO 4 Group	Future Growth (ANZSCO 4)	Future Growth Rating (ANZSCO 4)	Occupation Title (ANZSCO 6)	Current QLD Labour Market Assessment (ANZSCO 6)	Future Demand Indicator (ANZSCO 6 - AUS)
Child Carers	5.9%	Moderate	Child Care Workers	Shortage	Strong
			Family Day Care Workers	No Shortage	Moderate
Early Childhood (Pre-primary School) Teachers	21.6%	Very Strong	Early Childhood (Pre-primary School) Teacher	Shortage	Strong
Education Advisers and Reviewers	10.1%	Strong	Education Advisers	No Shortage	Strong
			Education Reviewers	No Shortage	Strong
Education Aides	17.4%	Very Strong	Aboriginal and Torres Strait Islander Education Workers	No Shortage	Moderate
			Integration Aides	No Shortage	Moderate
			Teachers' Aides	No Shortage	Moderate
			Preschool Aides	No Shortage	Moderate
			Integration Aides	No Shortage	Moderate
			Teachers' Aides	No Shortage	Moderate
Middle School Teachers	21.0%	Very Strong	Middle School Teacher	No Shortage	Moderate
Other Education Managers	11.2%	Strong	Faculty Heads	No Shortage	Strong
			Regional Education Managers	No Shortage	Strong
			Education Managers (not covered elsewhere)	No Shortage	Strong
Primary School Teachers	5.1%	Moderate	Primary School Teacher	Shortage	Moderate
Private Tutors and Teachers	13.6%	Strong	Art Teachers (Private Tuition)	No Shortage	Strong
			Dance Teachers (Private Tuition)	No Shortage	Strong
			Drama Teachers (Private Tuition)	No Shortage	Strong
			Music Teachers (Private Tuition)	No Shortage	Strong
			Other Private Tutors and Teachers	No Shortage	Strong
School Principals	11.5%	Strong	School Principal	No Shortage	Moderate
Science Technicians	6.8%	Moderate	School Laboratory Technicians	No Shortage	Moderate
Secondary School Teachers	3.7%	Moderate	Secondary School Teacher	Shortage	Moderate
Special Education Teachers	13.5%	Strong	Special Needs Teachers	Shortage	Moderate
			Teachers of the Hearing Impaired	Shortage	Moderate
			Teachers of the Sight Impaired	Shortage	Moderate
			Other Special Education Teachers	Shortage	Moderate
Teachers of English to Speakers of Other Languages	0.0%	Stable	Teacher of English to Speakers of Other Languages	No Shortage	Moderate
University Lecturers and Tutors	16.6%	Very Strong	University Lecturers	No Shortage	Moderate
			University Tutors	No Shortage	Moderate
Vocational Education Teachers	8.7%	Strong	Vocational Education Teacher	Shortage	Moderate

Education and Training Occupations Criticality Assessment - *Toowoomba*

Education and Training Unit Groups and Occupations	Employed in T'mba SA4 (ANZSCO 4)	Critical Operations
Category 1	**2,231**	
Child Carers 421111 - Child Care Workers	**884**	These occupations are currently experiencing a labour market shortage in Queensland, have a strong or moderate future demand nationally, and a national growth rating (e.g. expected increase in number of jobs) of Very Strong (>15%), Strong (8% to 14.9%) or Moderate (3% to 7.9% growth)
Early Childhood (Pre-primary School) Teachers 241111 - Early Childhood (Pre-primary School) Teacher	**185**	
Primary School Teachers 241213 - Primary School Teacher	**1,021**	
Secondary School Teachers 241411 - Secondary School Teacher	**965**	
Special Education Teachers 241511 - Special Needs Teachers 241512 - Teachers of the Hearing Impaired 241513 - Teachers of the Sight Impaired 241599 - Other Special Education Teachers	**113**	
Vocational Education Teachers 242211 - Vocational Education Teacher	**84**	
Category 2	**1,667**	
Education Advisers and Reviewers 249111 - Education Advisers 249112 - Education Reviewers	**62**	These occupations are *not* currently experiencing a labour market shortage in Queensland, but do have a strong or moderate future demand nationally, and a national growth rating (e.g. expected increase in number of jobs) of Very Strong (>15%), Strong (8% to 14.9%) or Moderate (3% to 7.9% growth)
Education Aides 422111 - Aboriginal and Torres Strait Islander Education Workers 422112 - Integration Aides 422115 - Preschool Aides 422116 - Teachers' Aides	**1,077**	
Middle School Teachers 241311 - Middle School Teacher	**26**	
Other Education Managers 134411 - Faculty Heads 134412 - Regional Education Managers 134499 - Education Managers (not covered elsewhere)	**55**	
Private Tutors and Teachers 249211 - Art Teachers (Private Tuition) 249212 - Dance Teachers (Private Tuition) 249213 - Drama Teachers (Private Tuition) 249214 - Music Teachers (Private Tuition) 249299 - Other Private Tutors and Teachers	**137**	
School Principals 134311 - School Principal	**310**	
University Lecturers and Tutors 242111 - University Lecturers 242112 - University Tutors		
Category 3	**989**	
Child Carers 421112 - Family Day Care Workers	**884**	These occupations are *not* currently experiencing a labour market shortage in Queensland, and are expected to have moderate future demand nationally, and a national growth rating (e.g. expected increase in number of jobs) of Moderate (3% to 7.9% growth) or Stable (-3.0% to 2.9%)
Science Technicians 311414 - School Laboratory Technicians	**64**	
Teachers of English to Speakers of Other Languages 249311 - Teacher of English to Speakers of Other Languages	**41**	

As per data provided by the ABS. Note, the number of employed people is at the ANZSCO 4 level, but the criticality is at the ANZSCO 6 level, so the number may appear across more than one category.

Part 5 – Appendices and References

References

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4. Toowoomba, 2016 Census All persons QuickStats, Australian Bureau of Statistics
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