Australian Library and
Information Association

ALIA LIS EDUCATION, SKILLS AND EMPLOYMENT
TREND REPORT 2018

CONTENTS

INTRODUCTION

This is the fifth annual *ALIA LIS Education, Skills and Employment Trend Report*. Our intention is to provide students, educators, employees and employers with an understanding of the national library and information science (LIS) landscape, and the Association with the data we need to help inform our work as the sector's peak professional body.

This 2018 report updates some of the statistics in the previous editions, using the latest figures from the Commonwealth Departments of Education and Jobs and Small Business. In some sections we have included data for Gallery and Museum Technicians, Archivists, Curators and Records Managers.

All the Trend Reports are available on the ALIA website www.alia.org.au/employment-and-careers/alia-lis-education-skills-and-employment-trend-report.

December 2018

KEY FINDINGS AND INTERPRETATION OF RESULTS

THE FACTS

In 2018, there were 10 Higher Education institutions offering 23 ALIA accredited courses, including Master's, Bachelor and Graduate Diploma. There were two universities, 14 TAFEs and one private RTO offering the 17 ALIA accredited Diploma of Library and Information Services courses, making a total of 27 accredited institutions and 40 accredited courses.

Based on Equivalent Full Time Student Load (EFTSL) for Higher Education, and Full Year Training Equivalent (FYTE) for VET, 52% of LIS students are enrolled in Vocational Education and Training (VET) courses and 48% of students are enrolled in Higher Education courses. The most popular qualifications continue to be the Master's degree in Higher Education and the Diploma in the VET sector.

The number of LIS students enrolled in ALIA accredited Higher Education courses has dipped below 900 EFTSL for the first time since 2011, and for VET students the figure has fallen below 600 FYTE students. Are we producing enough graduates to meet demand? At this stage it would appear yes, given employment demand and unemployment levels.

The Department of Employment Australian Jobs 2018 report projected that in the five years from May 2018 to May 2023, there will be 1000 more Librarian positions in the workforce; 300 fewer Technician positions, and 300 fewer Library Assistant positions.

Part-time work remains a significant characteristic in our workforce with the majority, approximately 63% of Library Assistants working part-time, just under half of Technicians (45%) and just over one third of Librarians (38%).

The unemployment level for Librarians was average when compared with other occupations, while the level for Library Technicians and Library Assistants was below average. The top three states in terms of the number of job opportunities continued to be NSW, Victoria and Queensland.

As well as library and information service delivery positions, there were also approximately 1000 jobs working for the Australian industry partners who supply library and information related products.

OUR INTERPRETATION

Library and information science (LIS) is an occupation with a relatively small, highly qualified workforce and an even smaller educational footprint. Although the LIS workforce is small, our sector has significant reach and profile. ALIA estimates that some 12.9 million Australians use library services. More than 9.3 million Australians are registered public library users (source Australian Public Libraries Statistical Report 2015-2016) and still more use university, VET, special and school libraries.

The library and information sector remains an attractive employment choice but there is undoubtedly competition for jobs. The workforce tends to be fairly static, with a relatively small number of vacancies occurring through staff turnover, people leaving the sector and the creation of new positions.

There will be a modest increase in the number of qualified positions available over the next five years, but a decrease in the number of positions for staff without a library and information science qualification. The growth shows the importance of a formal commitment to ongoing learning by LIS professionals to stay current, such as utilising the recognition provided by ALIA's Certified Professional PD Scheme. Changes to ALIA's Professional Development Program in the lead up to 2020 reflect the need for Certified Professional status in many parts of the sector.

DETAILED FINDINGS

INSTITUTIONS PROVIDING LIS EDUCATION

In 2018, there were 10 Higher Education institutions offering 23 ALIA accredited courses, including Master's, Bachelor and Graduate Diploma. Charles Sturt University, Monash University and RMIT University all offer an ALIA accredited Graduate Diploma as an early exit point from their Master's courses. The Graduate Certificate is not an ALIA accredited course as it does not fulfil the requirements for the Library and Information Sector: Core Knowledge, Skills and Attributes and the Foundation Knowledge, Skills and Attributes relevant to Information Professionals working in Archives, Libraries and Records Management.

There were universities, TAFEs and a private RTO offering 17 ALIA accredited Diploma courses, making a total of 27 accredited institutions and 40 accredited

courses [figures 1 and 2]. Pacific Technical and Further Education (Pacific TAFE), The University of the South Pacific in Fiji was granted accreditation from January 2018 to January 2020 for the Diploma of Library and Information Studies.

In late 2018, Queensland University of Technology announced no further intake for Semester 1, 2019 for the Master of Education (Teacher-Librarianship) and we are waiting to be informed of QUT's future plans for this course at the time of publication.

Figures 1 and 2 include courses currently being taught out. The Higher Education projections for 2019 are for eight institutions and 17 courses, as several Higher Education institutions will have taught out their courses by the end of 2018, namely Edith Cowan University with four courses, and University of Canberra's one course. The University of Technology Sydney Bachelor of Arts in

Communication (Information and Media) program which will also finish teaching in 2018.

During 2018 ALIA formed an ALIA Education Advisory Committee (EAC) to provide advice to the ALIA Board on ALIA's education policies and guidelines. The EAC is chaired by Professor Gillian Hallam and reports directly to the ALIA Board. Members of the committee are: Anne Bell, Nicole Brett, Anne Girolami, Cheryl Hamill, Jo Hanisch, Kym Holden, Ebe Kartus, Kathryn Leong, Terri Pamment, Helen Partridge, Bob Pymm and Geoff Strempel.
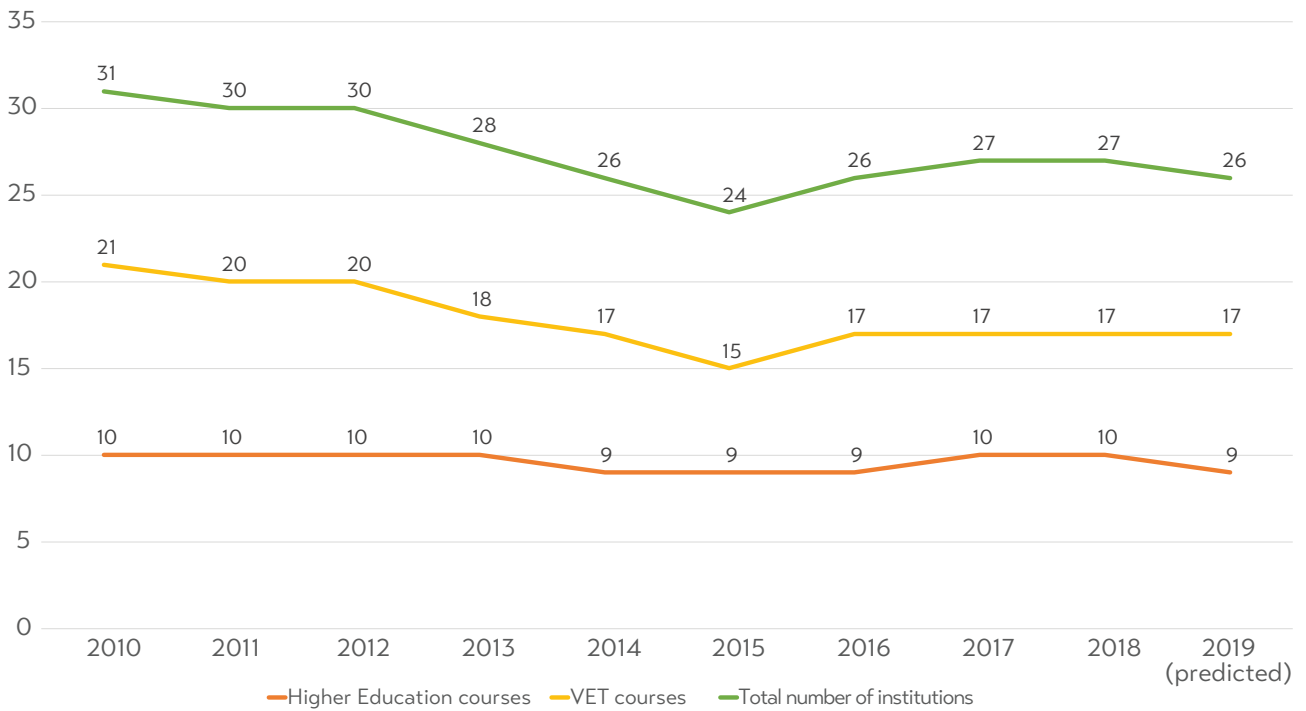
One of the requirements of ALIA accreditation is the submission of an Annual Course Return. Comments from Annual Course Returns for 2017 show both Higher Education institutions and VET providers face increasing compliance demands and institutional internal restructuring due to funding cuts. This restructuring in many instances includes reduced staff numbers and hours. Our course providers are responding in different ways to meet these challenges. One Higher Education provider will be offering four 10 week terms from 2019. Curtin University has a partnership with Open Universities Australia. TAFE NSW is amalgamating 10 institutions to a one TAFE structure, which may impact on the six ALIA accredited Diploma courses that are currently being delivered in both metropolitan and rural NSW.

There are currently no ALIA accredited courses in Tasmania, ACT or the Northern Territory. The majority of Diploma and Higher Education courses are available online, so location is no barrier to course delivery. Course fees vary between institutions around Australia, and with many being offered online, students are able to 'shop around'.

Vocational courses are currently under review with proposed changes to the Business Services Training package, due to be completed by 2020. The proposal is to add more choice for students to undertake newly created archive and updated record keeping units. This will increase the employment opportunities for graduates completing the Diploma of Library and Information Services.
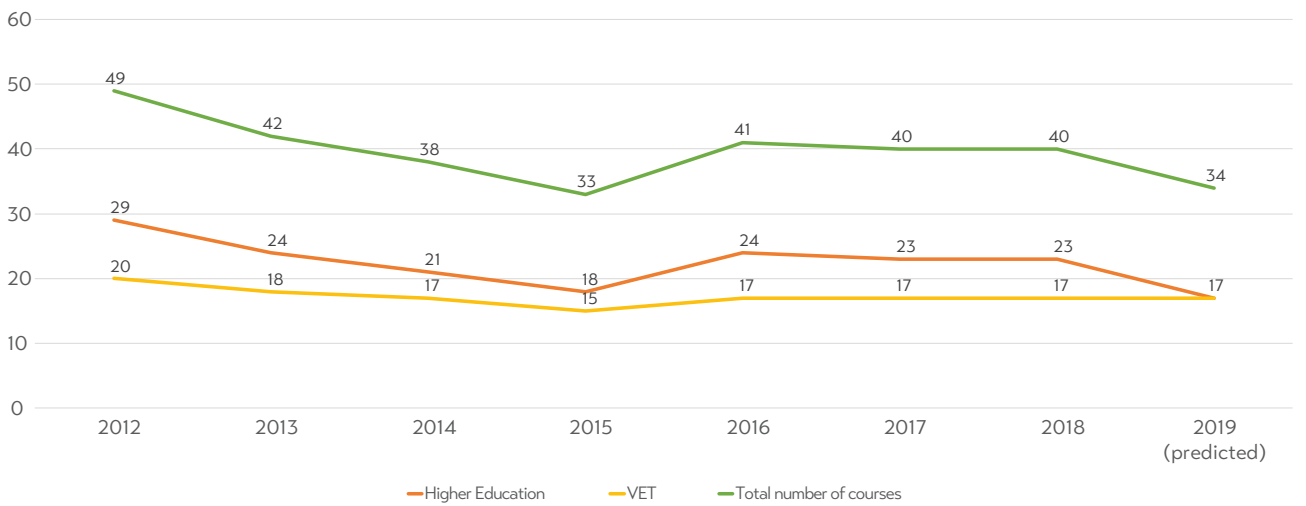
Several highly respected and long standing academics retired during 2018. This trend is expected to continue over the next few years, and the Association encourages and facilitates temporary transfers between educators and practitioners within the LIS sector to foster collaboration and support currency and relevance for teaching and research.

Figure 1: Number of ALIA accredited institutions

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019 (predicted)
Total number of institutions	31	30	30	28	26	24	26	27	27	26
VET courses	21	20	20	18	17	15	17	17	17	17
Higher Education courses	10	10	10	10	9	9	9	10	10	9

Higher Education courses — VET courses — Total number of institutions

Source: ALIA course accreditation records 2018

Figure 2: Number of ALIA accredited LIS courses

	2012	2013	2014	2015	2016	2017	2018	2019 (predicted)
Total number of courses	49	42	38	33	41	40	40	34
Higher Education	29	24	21	18	24	23	23	17
VET	20	18	17	15	17	17	17	17

Higher Education — VET — Total number of courses

Source: ALIA course accreditation records 2018

Figure 3: ALIA accredited LIS courses by state/territory
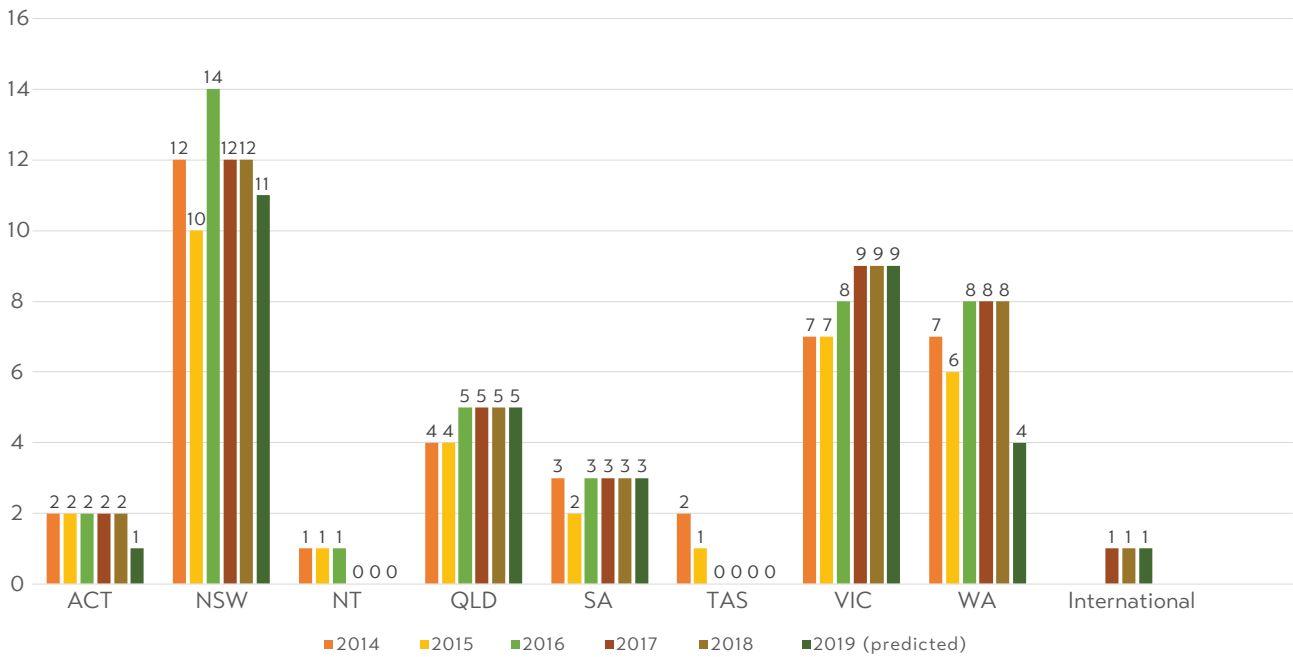
Source: ALIA course accreditation records 2018

LIS STUDENTS

Based on Equivalent Full Time Student Load (EFTSL) for Higher Education, and Full Year Training Equivalent (FYTE) for VET, 52% of students are enrolled in VET courses and 48% of students are enrolled in Higher Education courses. Figure 4 shows enrolments that include all LIS courses (Certificate II, Certificate III, Certificate IV, Diploma, Advanced Diploma, Bachelor, Graduate Diploma and Master's), while Figure 5 gives figures for ALIA accredited courses (Diploma and above).

The Master's qualification was the most popular LIS qualification in Higher Education (figure 6) with 549 out of 874 enrolled in Master's courses (EFTSL) at 64% of Higher Education courses. In the VET sector, program enrolments continue to fall from 2870 in 2015 to 2515 in 2016 and 1801

in 2017 [figure 7]. Completion rates were steady in 2015 and 2016 at 28% per year, although preliminary completion rates for 2017 were higher at 35%. The Diploma remained the most popular qualification, with hardly any take up for the Certificate II [figure 8].

Using figures specially provided by the Department of Education and Training, we were able to go into further detail about Higher Education LIS students for this report. Figures 6, 9, 10, 11 and 12 show EFTSL numbers. The biggest drop in enrolments by discipline (figure 9) was in Librarianship and Information Management, (Field of Education type 091301) while enrolments for Librarian, Information Management, Curatorial Studies (Field of Education type 091300) and Teacher-Librarianship (Field of Education type 070107) remained steady.
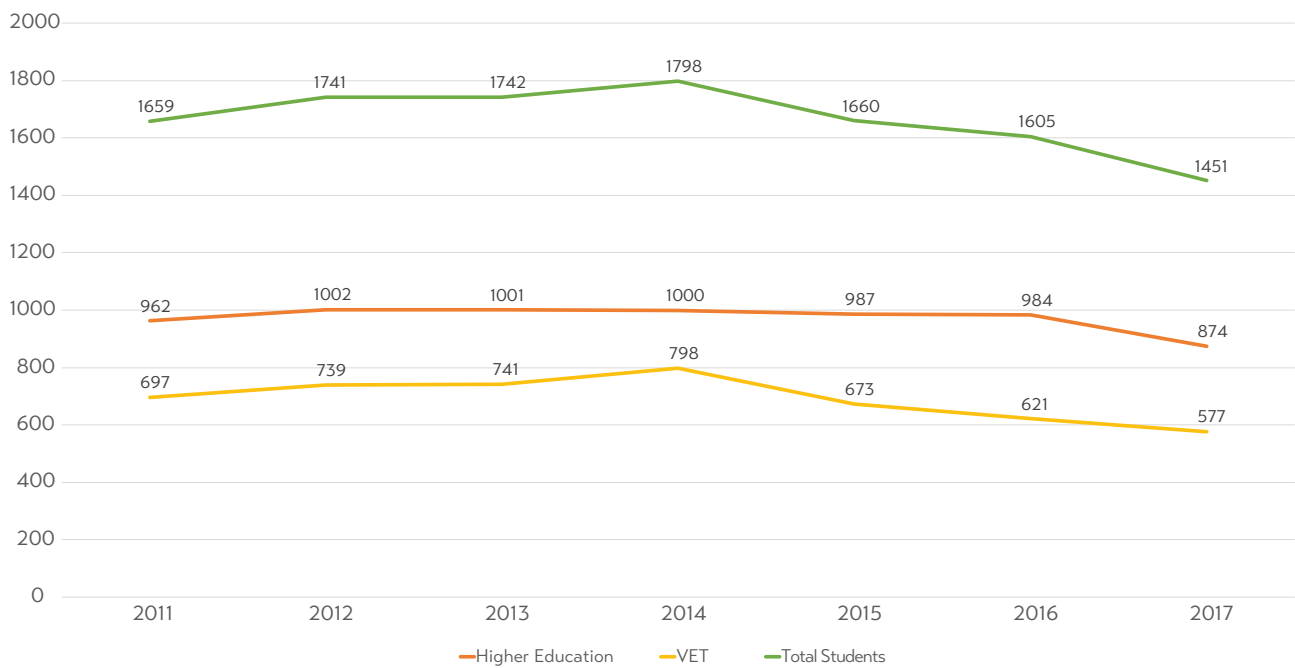
The proportion of students who study part time has remained reasonably steady over the last 10 years with between 63% and 68% studying part time. In 2017 65% of students were studying part time (figure 11). The number of Commonwealth supported places peaked in 2011 at 757 places and was at 535 places in 2017 or 61% of total places (874 total) (figure 12).

Figure 4: Number of students enrolled in LIS courses in Australia. All courses: Certificate II, Certificate III, Certificate IV, Diploma, Bachelor, Graduate Diploma and Masters.
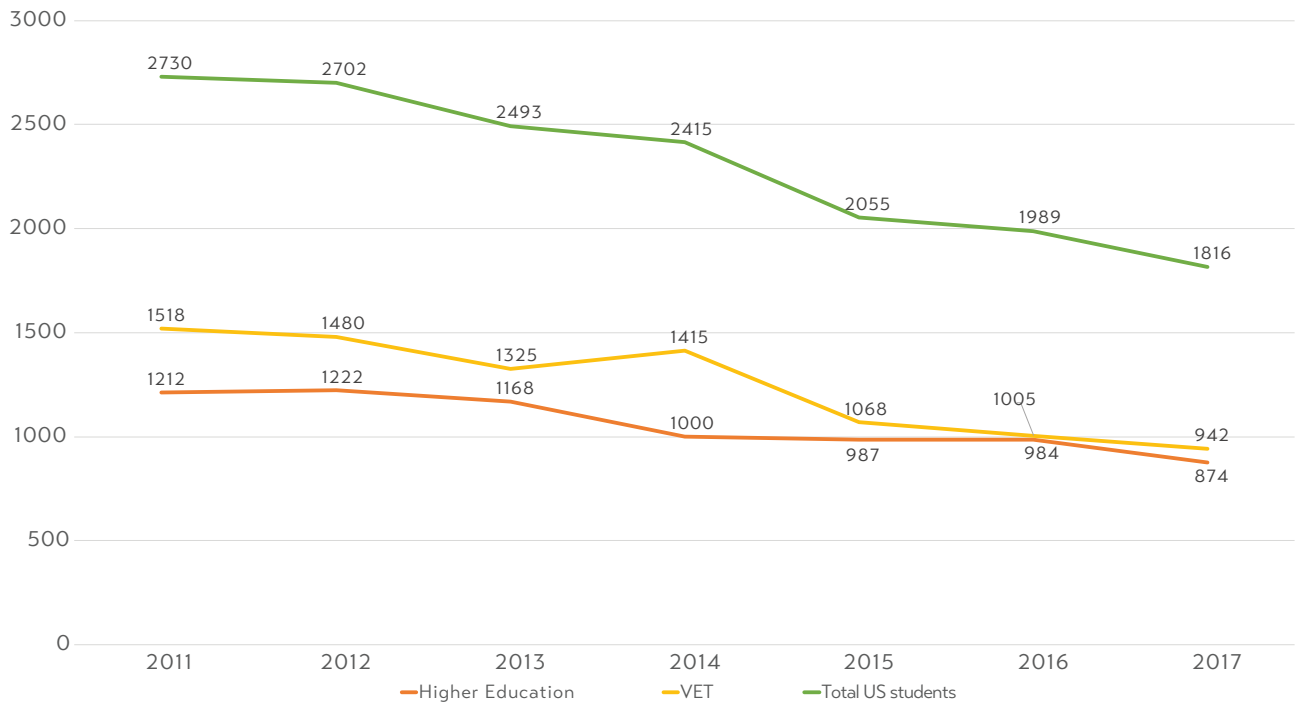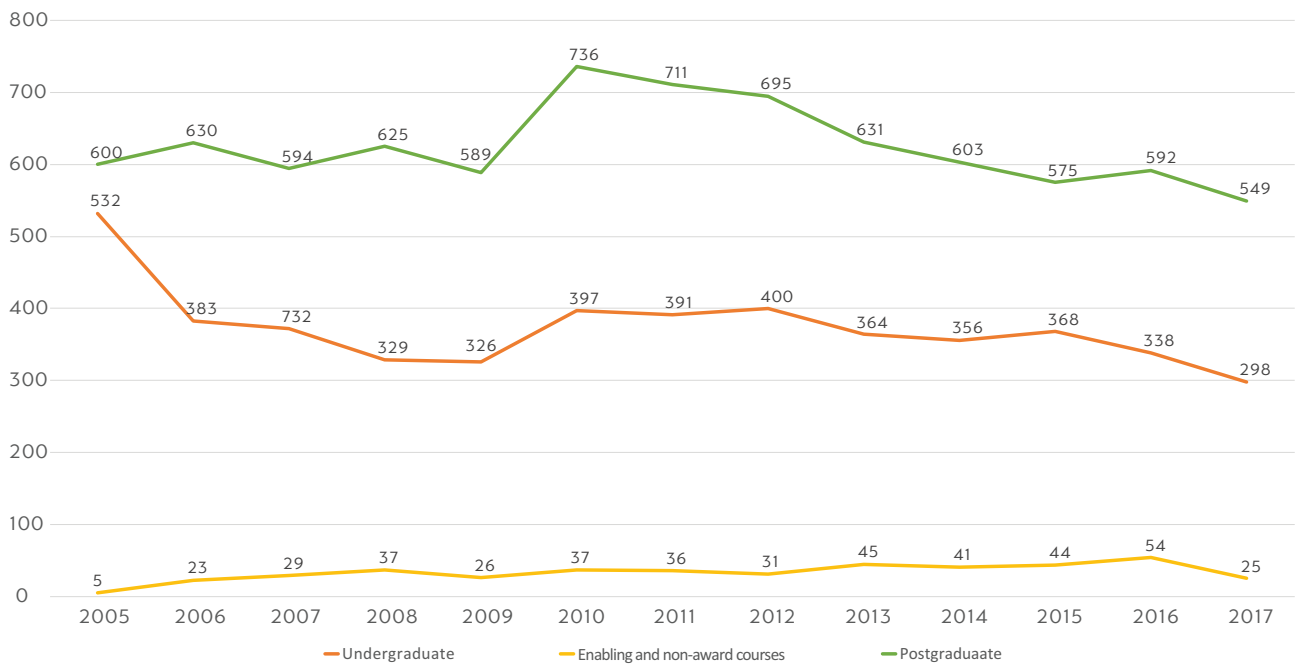

Source: Department of Education, National Centre for Vocational Education Research (NCVER).

Figure 5: Number of students enrolled in ALIA accredited LIS courses

	2011	2012	2013	2014	2015	2016	2017
Total Students	1659	1741	1742	1798	1660	1605	1451
Higher Education	962	1002	1001	1000	987	984	874
VET	697	739	741	798	673	621	577

Source: Department of Education, NCVER

Figure 6: LIS Higher Education student numbers by level

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Postgraduate	600	630	594	625	589	736	711	695	631	603	575	592	549
Undergraduate	532	383	732	329	326	397	391	400	364	356	368	338	298
Enabling and non-award courses	5	23	29	37	26	37	36	31	45	41	44	54	25

Source: Department of Education

Figure 7: Total VET LIS program enrolments and completions
## Includes all levels of certification from Certificate II to Diploma

Figure 7: Total VET program enrolments and completions
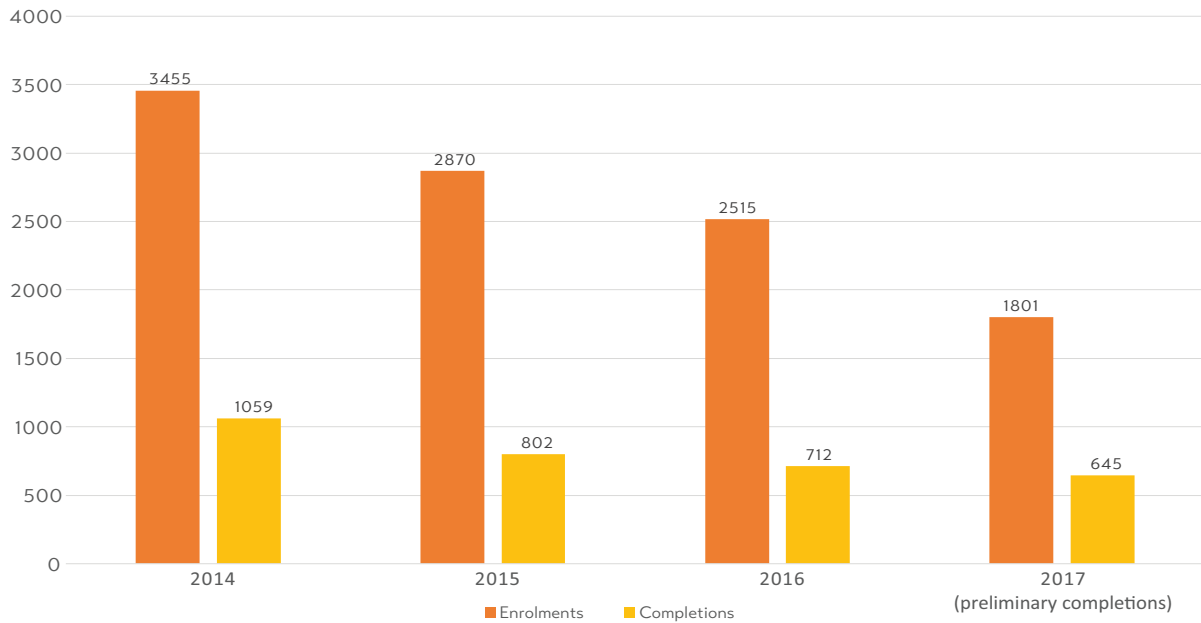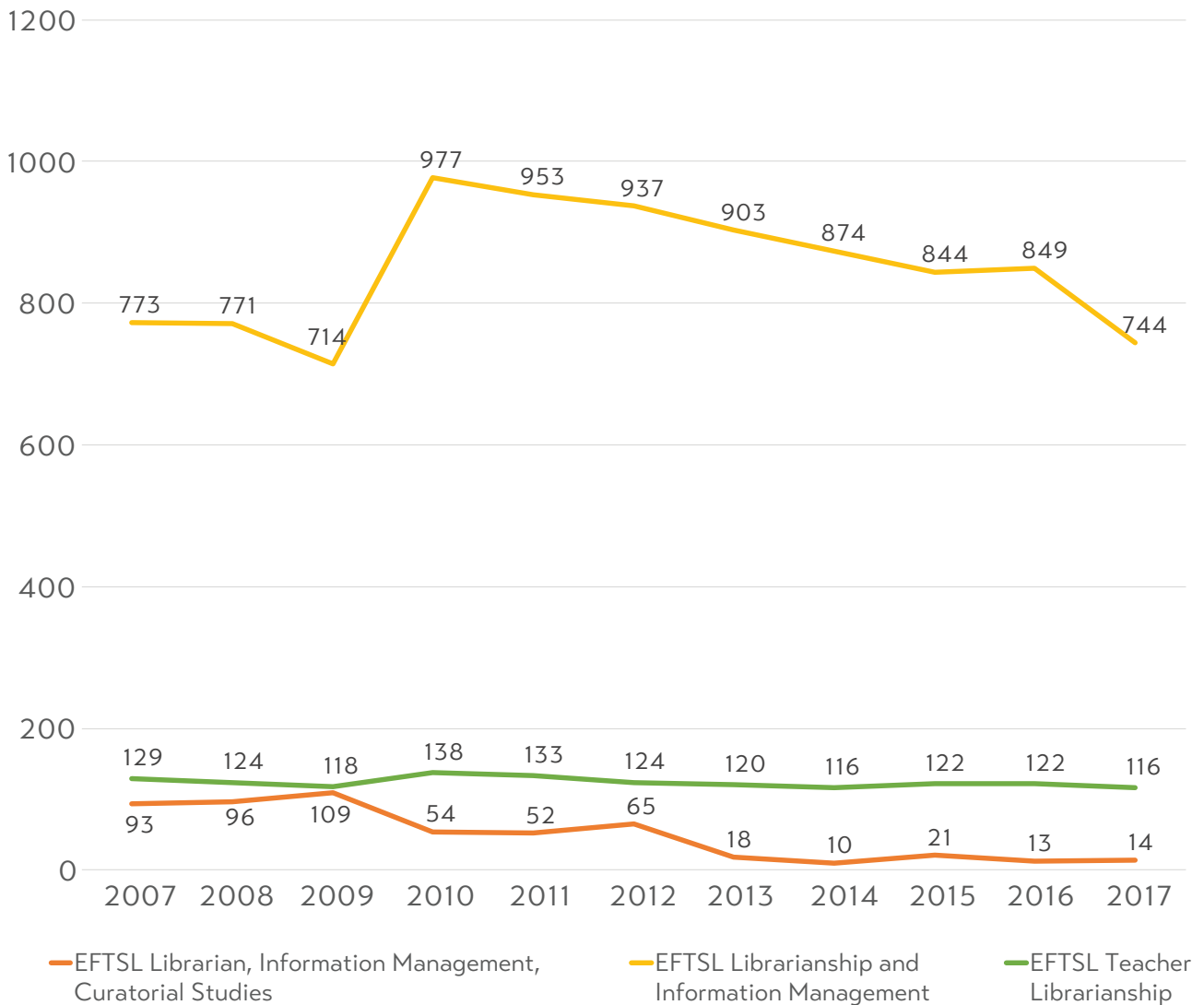
Source: NCVER (past year figures updated)

Figure 8: Number of VET students enrolled in Library, Information and Cultural Services courses at various levels

Figure 8: Number of VET students enrolled in Library, Information and Cultural Services courses at various levels (not FYTE)
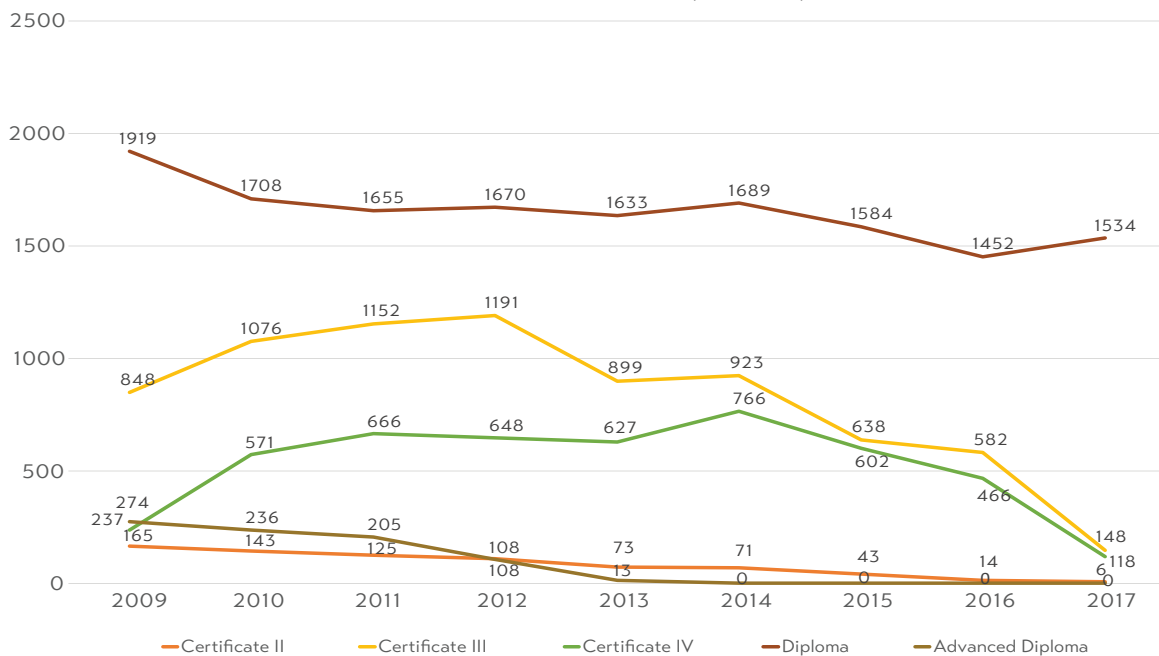
Source: NCVER (past year figures updated)

Figure 9: LIS Higher Education student numbers —equivalent full time student load by discipline.

Year	EFTSL Librarian, Information Management, Curatorial Studies	EFTSL Librarianship and Information Management	EFTSL Teacher Librarianship
2007	93	773	129
2008	96	771	124
2009	109	714	118
2010	54	977	138
2011	52	953	133
2012	65	937	124
2013	18	903	120
2014	10	874	116
2015	21	844	122
2016	13	849	122
2017	14	744	116

Source: Department of Education

Figure 10: LIS Higher Education student numbers by mode of attendance

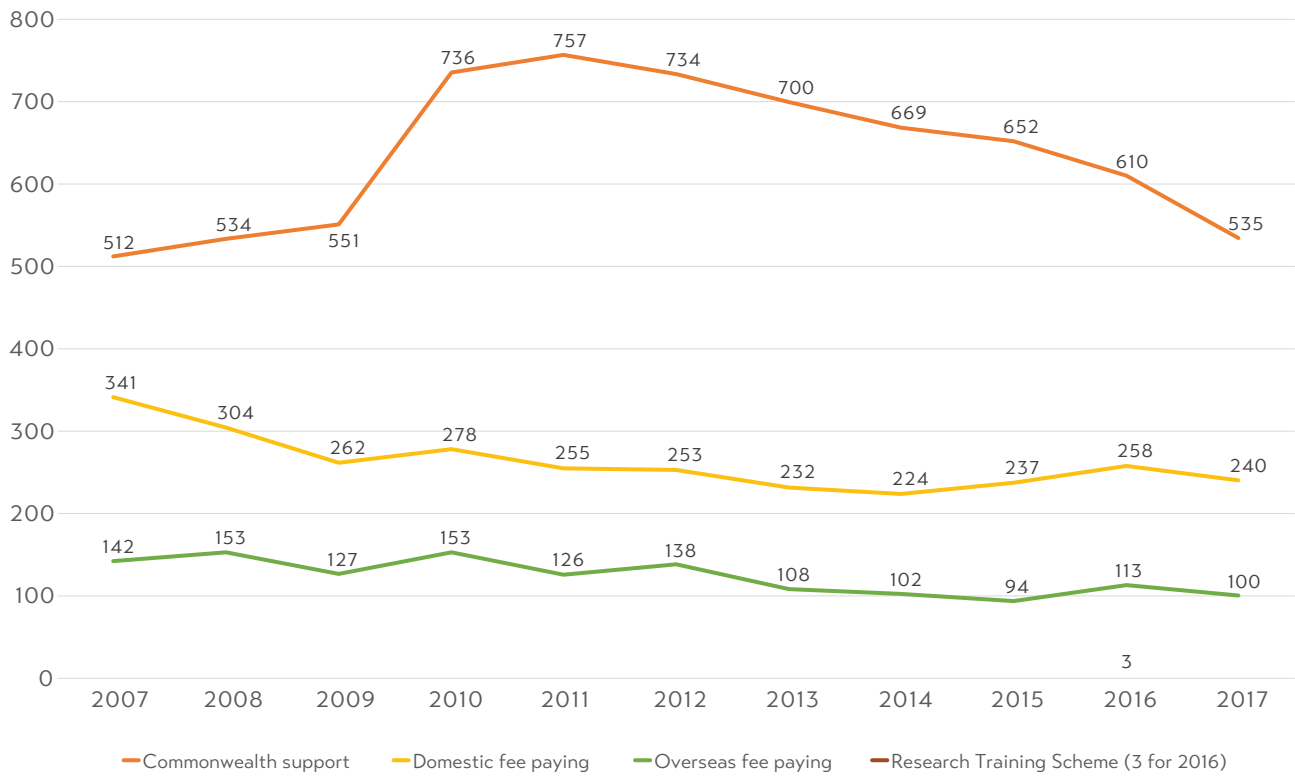| Year	Internal	External	Multi-modal
2007	360	634	
2008	378	613	
2009	286	644	11
2010	327	819	22
2011	279	828	32
2012	313	784	29
2013	223	795	23
2014	193	807	
2015	187	800	
2016	212	722	
2017	157	717	
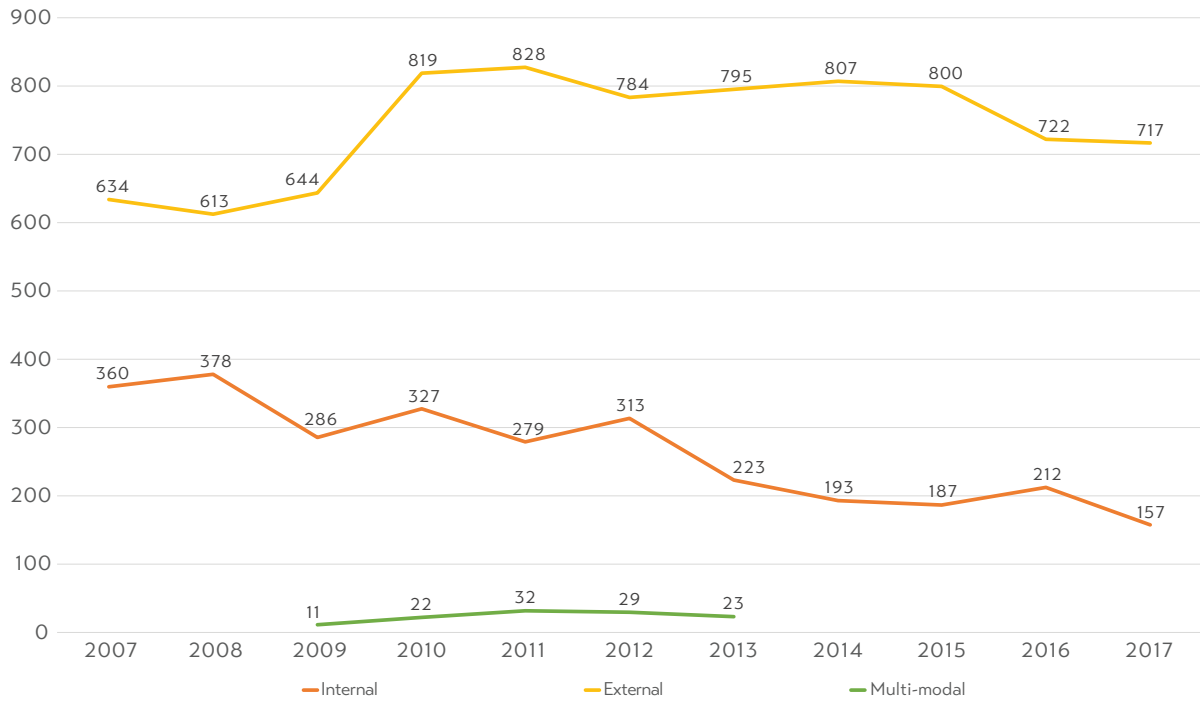
Source: Department of Education

Note: The number of multi-modal students has been omitted where there are <5

Figure 11: LIS Higher Education student numbers - full time and part time

Year	Full time	Part time
2007	317	679
2008	359	632
2009	295	646
2010	409	759
2011	399	738
2012	411	714
2013	369	672
2014	343	657
2015	338	649
2016	361	623
2017	299	576

Source: Department of Education

ALIA LIS EDUCATION, SKILLS AND EMPLOYMENT TREND REPORT 2018
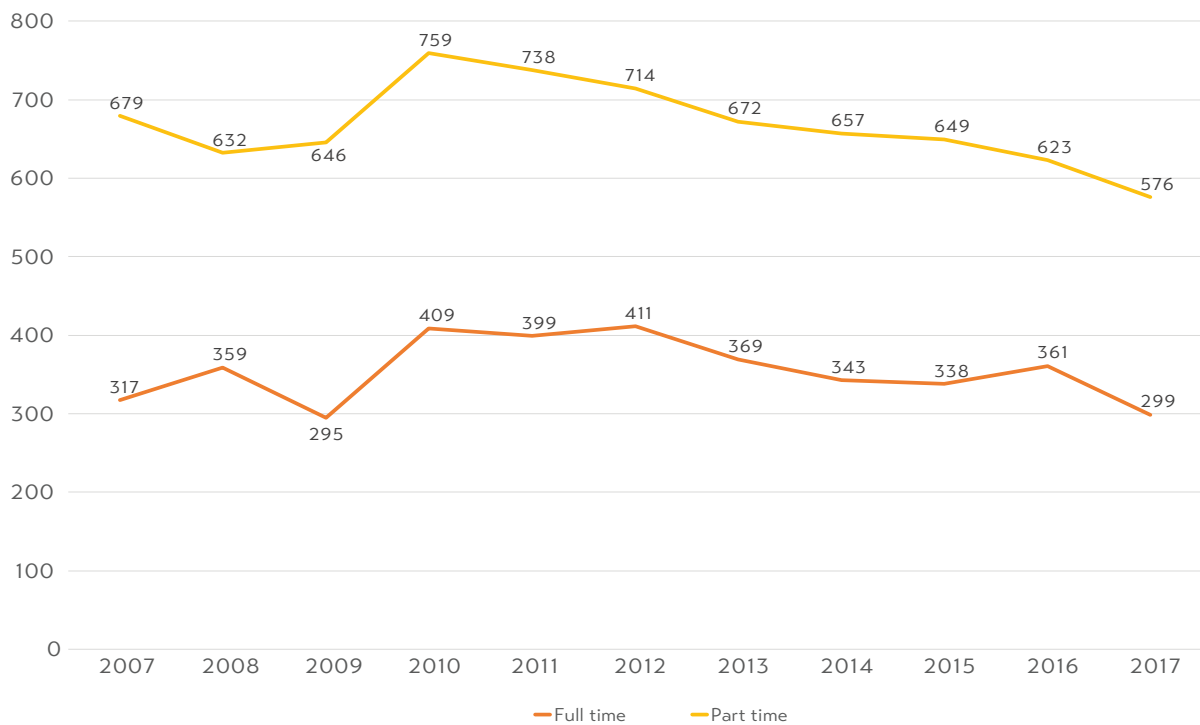
Figure 12: LIS Higher Education student numbers by liability status

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Commonwealth support	512	534	551	736	757	734	700	669	652	610	535
Domestic fee paying	341	304	262	278	255	253	232	224	237	258	240
Overseas fee paying	142	153	127	153	126	138	108	102	94	113	100
Research Training Scheme										3	

Commonwealth support   Domestic fee paying   Overseas fee paying   Research Training Scheme (3 for 2016)

Source: Department of Education

14

EMPLOYMENT

The figures from the Department of Employment Australian Jobs 2018 report [table 1, figures 13 and 14] differed from the figures given last year in Department of Employment Australian Jobs 2017. We have included both the Occupational Projections to May 2022 (released in 2017) and the more recent Occupational Projections to May 2023 to show the volatility of such projections; an anticipated 15.6% projected employment growth five years to May 2022 as opposed to a 6.4% projected employment growth to May 2023 for Librarians.

The Department of Jobs and Small Business Job Outlook is still using the 2017 projections to 2022 and reports future growth for Librarians to be very strong. This growth however could be tempered somewhat in the next update to the Job Outlook.

The Department of Employment does state that '...These employment projections are designed to provide a guide to the future direction of the labour market, however, like all such exercises, they are subject to an inherent degree of uncertainty...The employment projections are based on detailed data from the Australian Bureau of Statistics Labour Force Survey. The projections have been derived from best practice time series models that summarise the information that is in a time series and convert it into a forecast'.

The number of jobs for Librarians at May 2017 was 12,500 rising to 15,400 in May 2018, an increase of 2,900 Librarian jobs in a year, with a corresponding 1000 less jobs for Archivists, Curators and Records Managers for the same period to May 2018.

The projected employment growth for five years to May 2022 was 0.8% for Library Technicians and this is now at -3.5% to May 2023. Library Assistants faced a projected employment growth for five years to May 2017 of -13% and this is now at -4.4% to May 2023.

It should be noted that the Department of Jobs and Small Business Australian Jobs 2018 report does state (page 2) "...The labour market can change quickly, and there is currently a great deal of discussion about the future of work and the role of automation in determining the demand for particular workers. It isn't easy to forecast future labour market conditions, and it isn't advisable to base employment and training decisions solely on predicted shortages." This highlights the importance of a robust ALIA accreditation program where courses must meet rapidly changing industry and employer needs.

Library Technicians, Library Assistants and Archivists, Curators, Records Managers and Library Technicians all have below average unemployment levels compared with other occupations, while Librarians have an average unemployment level compared with other occupations.

Employment demand does vary across Australia. Anecdotal evidence reveals that it can be difficult to fill Librarian positions on the outskirts of major cities, for example positions in local government one to two hours out of Sydney on the periurban fringe. The recent 'Welcome to the Territory' incentives are an initiative of the Northern Territory Government, to boost and retain the Territory's population and to help Territory businesses attract workers into hard to fill jobs. Relocation, spending and retention

monetary incentives are available to early career females (aged 20 to 39 years) and late career workers (aged 55 to 65 years) in high priority occupations, and Librarian is listed as a high priority occupation.

The Department of Jobs and Small Business Australian Jobs 2018 report also states (page 32) '... Educational attainment is rising. The majority of employment growth over the past five years has been in occupations that generally require post-school qualifications, either through the VET or higher education sectors. This is a long-term trend which is likely to continue, with the vast majority of jobs growth over the next five years projected to be in higher skilled occupations'.

In the March 2018 NCVER report, Future job openings for new entrants by industry and occupation, Shah and Dixon noted that in 'Library and other information' (Industry ANZIC subdivision) 200 new LIS graduates a year will be required to meet replacement demand.

Table 1: Characteristics of LIS employment

	Librarians (ASIC 2246)	Technicians (ASIC 3993)	Library Assistants (ASIC 5997)	Archivists, Curators and Records Managers (ASIC 2242)
Number of jobs November 2010	14900	12500	6800	8600
Number of jobs November 2015	8400	11000	6000	6200
Number of jobs May 2017	12500	6700	6600	6600
Number of jobs November 2017	13800	7100	7200	7200
Employment level May 2018	15400	6600	7200	5600
Projected employment level — May 2022	14500	6700	5700	7800
Project employment level — May 2023	16400	6300	6900	5400
5 year change to November 2017	-1,100 or -7.1%	1,900 or 36.8%	1,200 or 19.6%	700 or 10.4%
Projected employment growth — five years to May 2022 (%)	15.6%	-0.8%	-13%	18.3%
Projected employment growth — five years to May 2023 (%)	6.4%	-3.5%	-4.4%	-4.0%
Future growth *	very strong	stable	decline	very strong
Unemployment level compared with other occupations	Average	Below average	Below average	Below average
Median age	51	51	49	46
Working part time	38%	45%	63%	29%
Female	89%	83%	88%	69%
Skill level [1]	1	2	4	1

Source: Department of Jobs and Small Business 2018

*From Job Outlook based on projections to 2022
https://joboutlook.gov.au/Occupation.aspx?search=&code=2242
https://joboutlook.gov.au/Occupation.aspx?search=&code=2246
https://joboutlook.gov.au/Occupation.aspx?search=&code=3993
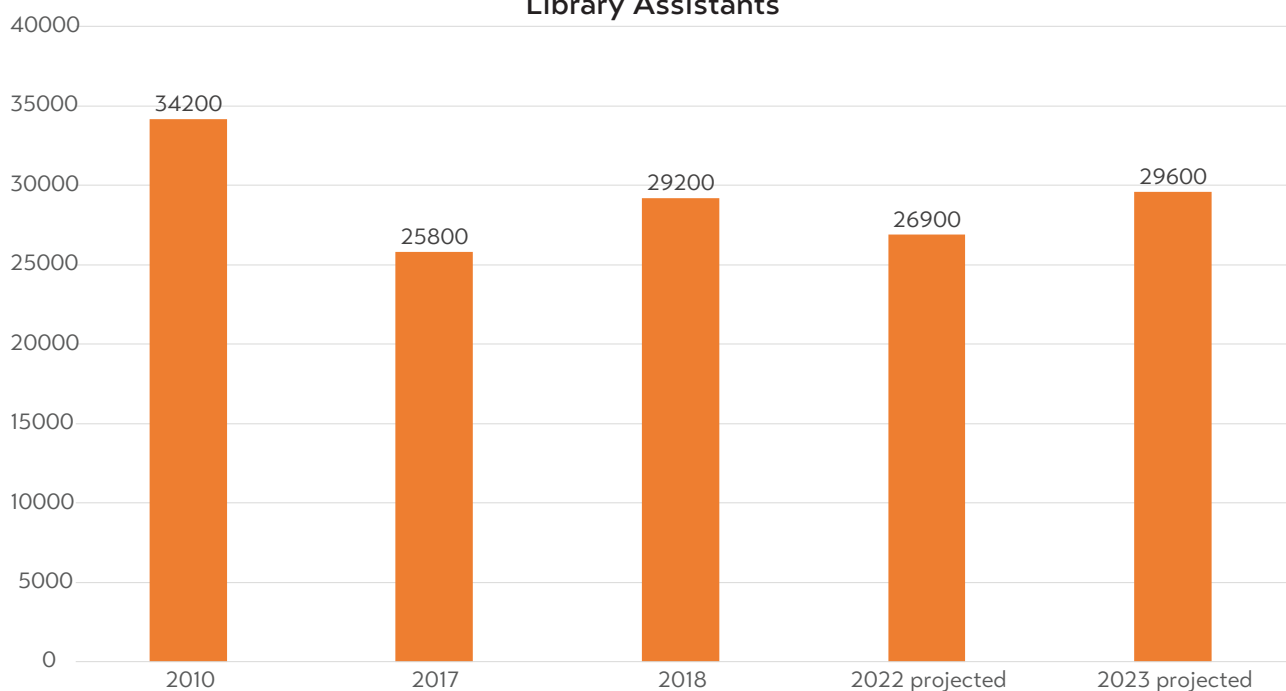https://joboutlook.gov.au/Occupation.aspx?search=&code=5997

[1] Skill level 1 is commensurate with a Bachelor degree or higher qualification; 2 is commensurate with an Advanced Diploma or Diploma; 4 is commensurate with a Certificate II or III

Figure 13: Total number of positions for Librarians, Library Technicians and Library Assistants

Source: Department of Employment Australian Jobs 2018

## Figure 14: Number of positions for library and information fields

- Librarians
- Gallery, Library and Museum Technicians
- Library Assistants
- Archivists, Curators, Records Managers
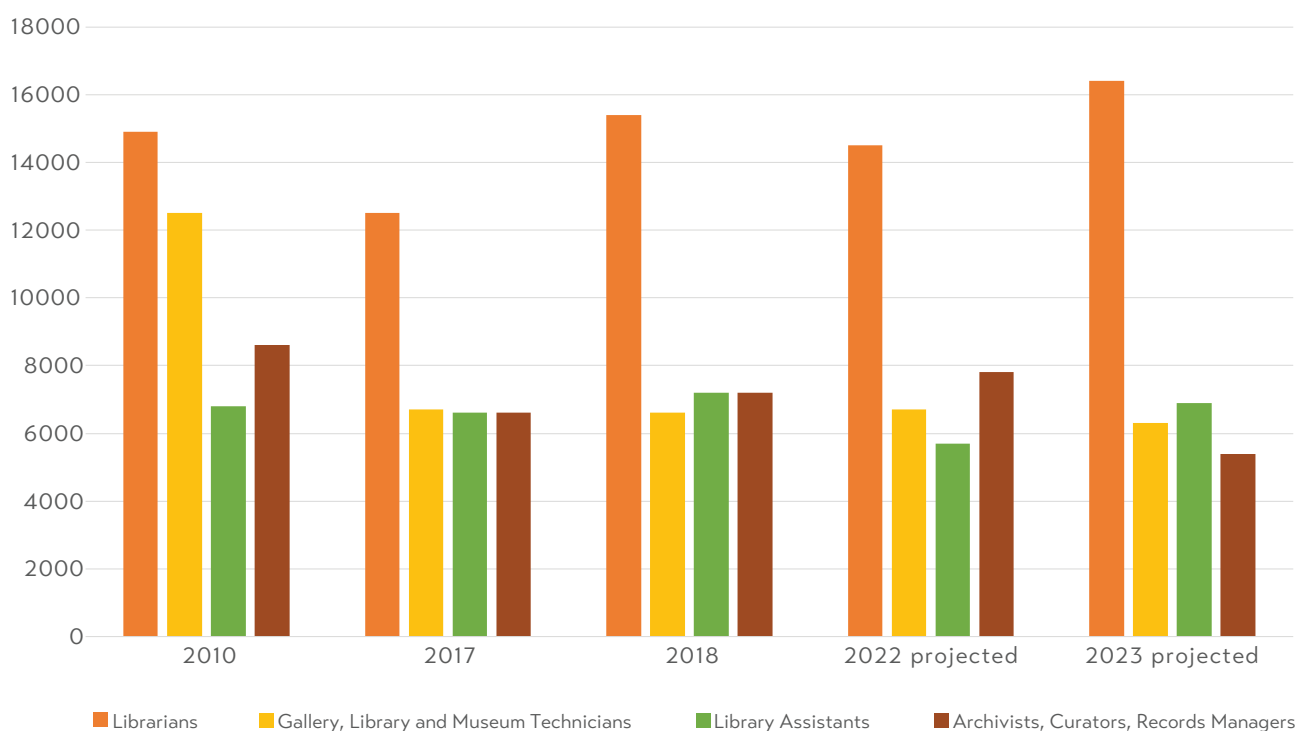
Source: Department of Employment Australian Jobs 2018

The comparison of job vacancies for library and other information professionals between 2010 and 2018 showed a steady demand for employees in this sector [figure 15] with an interesting healthy increase in the area of Archivists, Curators and Records Managers in the past year.

Looking at the state and territory breakdown [figure 16], there were greater opportunities in the most populated regions of New South Wales and Victoria, and of note some growth in vacancies in Queensland. Job vacancies were due to retirement, staff turnover, people moving within and out of the sector and the creation of new positions. Figures 16 and 17 show combined library and information field vacancies in June each year from 2012 to 2018 represented by column graph and line graph.

Figure 15: Comparison of library and information field job vacancies in June of each year (all Australia)
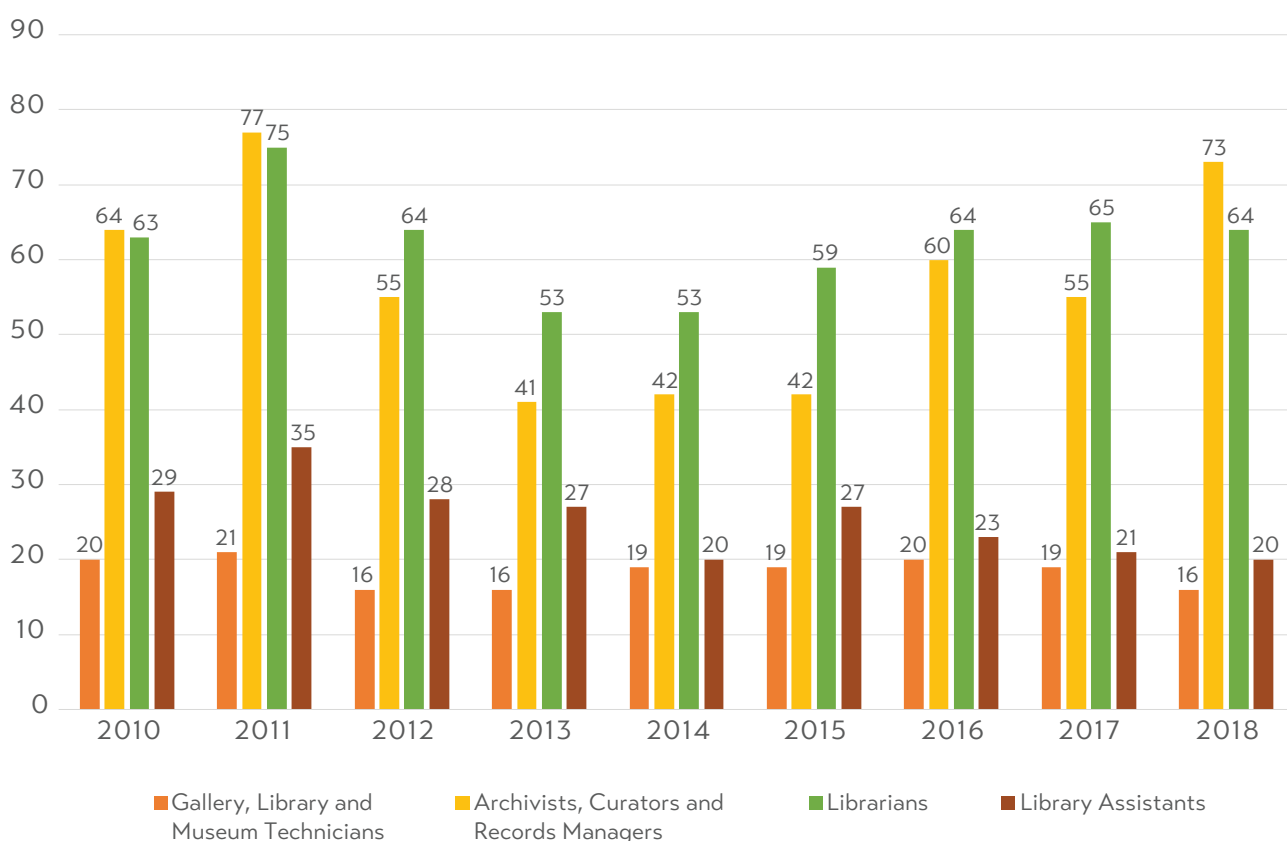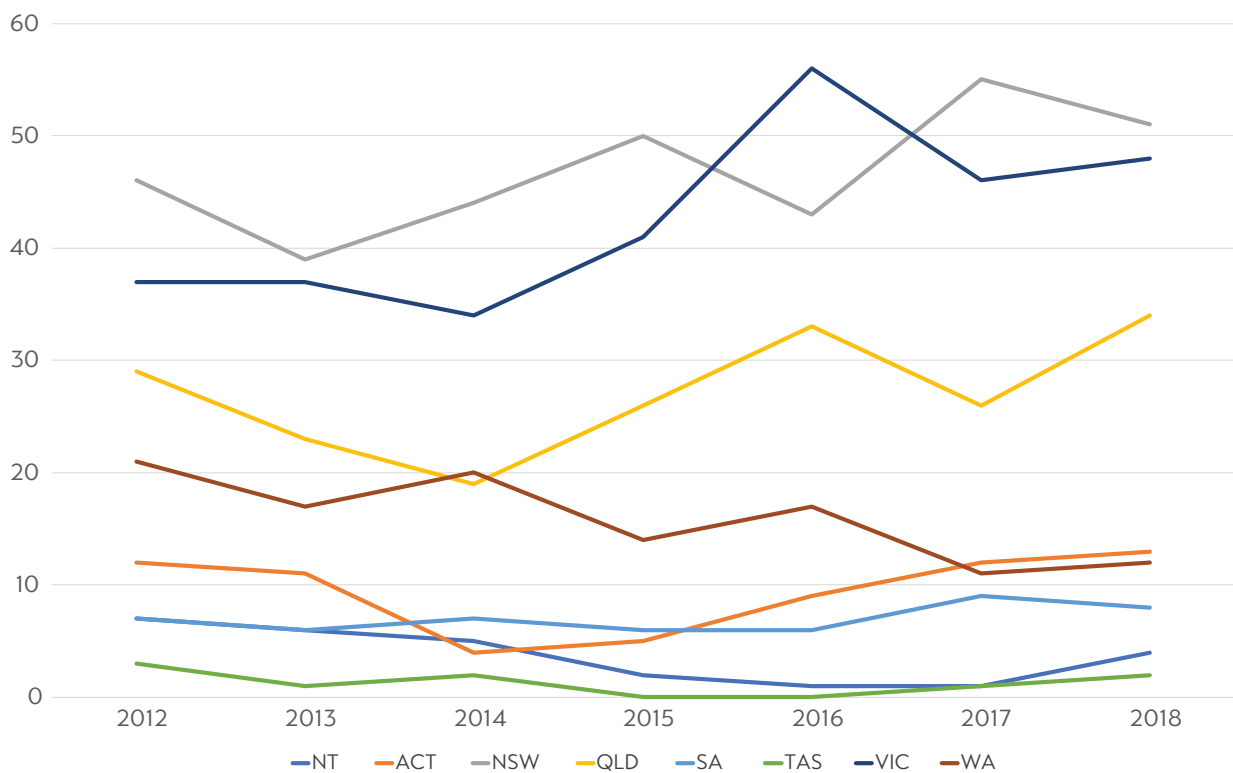

Source: Internet Vacancy Index, June 2018

Figure 16: Comparison of combined library and information field job vacancies in June of each year by state and territory
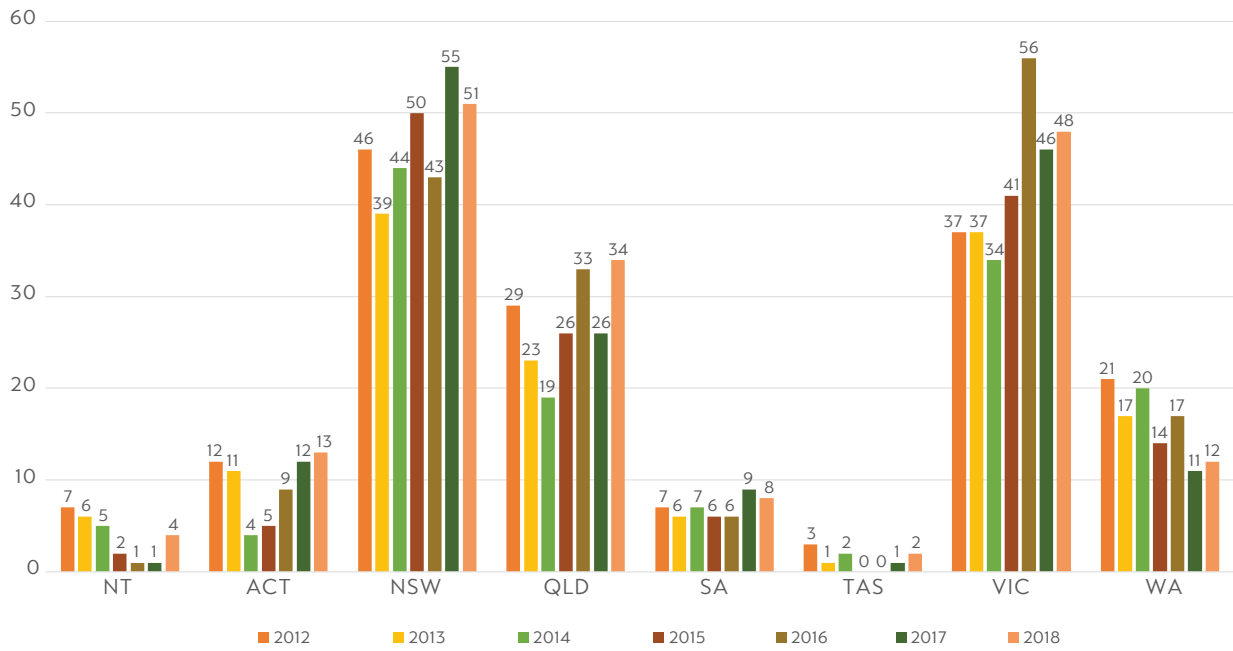
Source: Internet Vacancy Index, June 2018

Figure 17: Comparison of combined library and information field vacancies in June each year by state/territory - by line

Source: Internet Vacancy Index, June 2018

There were approximately 1000 jobs in the library and information supply sector, as noted in previous years, identified by the ABS Australian Industry statistics [table 2]. Often, the employees of these companies were qualified library and information professionals.

Table 2: Employment and financial performance of LIS businesses (vendors)

	Employment end of June	Wages and salaries $m	Total income $m	Total expenditure $m	Earnings before tax (EBITDA) $m
2012-2013	1000	54	191	166	23
2013-2014	1000	51	182	154	28
2014-2015	1000	49	194	153	26
2015-2016	1000	53	216	174	23[#]
2016-2017	1000	57	185	163	10[#]

[#] Estimate has a relative standard error of 25% to less than 50% and should be used with caution

Source: ABS Australian Industry 2016-2017

SOURCES AND LINKS FOR MORE INFORMATION

ALIA's website has extensive information about the library and information sector, education, employment, professional development and training, specifically ALIA Futures www.alia.org.au/futureoftheprofession, ALIA Employment and Careers www.alia.org.au/employment-and-careers and Careers in Library and Information Science www.alia.org.au/lis-careers.

National and State Libraries Australasia produces annual statistics for Australian public libraries www.nsla.org.au/sites/default/files/documents/nsla.aust-pub-lib-stats_2015-16.pdf.

The Australian Bureau of Statistics provides data about Australian education and employment from a number of different perspectives, including the Australian Industry 2016-17 report at www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/8155.0Main+Features12016-17.

The Department of Education hosts the Higher Education Statistics gathered from all Australian Higher Education institutions www.education.gov.au/student-data.

The National Centre for Vocational Education Research data provides data about VET students www.ncver.edu.au/.

The Department of Jobs and Small Business publishes Australian Jobs and The Australian Jobs Occupation Matrix docs.jobs.gov.au/documents/australian-jobs-occupation-matrix and hosts the Labour Market Information Portal lmip.gov.au/ and lmip.gov.au/default.aspx?LMIP/ GainInsights/EmploymentProjections which includes the Internet Vacancy Index.

Welcome to the Territory Incentives, theterritory.com.au/live/register.