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Translating and Interpreting Services: Case for change

Department of Home Affairs

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Deloitte Access Economics

Contents

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Glossary

Acronym	Full name
ABS	Australian Bureau of Statistics
Auslan	Australian Sign Language
CAGR	Compounded annual growth rate
EBA	Enterprise bargaining agreement
IVI	Internet Vacancy Index
JSA	Jobs and Skills Australia
LEP	Low English proficiency
LSP	Language Service Provider
NAATI	National Accreditation Authority for Translators and Interpreters
NDIS	National Insurance Disability Scheme
NILF	Not in the labour force
OH&S	Occupational health & safety
TIS	Translating and Interpreting services
VET	Vocational education and training

Term	Definition
Comparable occupation	Comparable occupations represent occupations which share a similar workforce composition (gender, age and skill level) and nature of employment, where they provide essential services. In this work, selected occupations include Auslan interpreters, school teachers, midwifes and nurses.
Bottom-up	An estimation method from the ground-up accounting, in this context this involves using hourly pay rates and hours worked each day.
'Effective' hourly wage	Average hourly wage after accounting for casual loadings and travel time, capturing the active assignment time.
Economic costs	The direct costs incurred by individuals, businesses and government involved in the provision and consumption of interpreting services. This includes direct monetary losses (e.g., in the form of lost wages) or increased operational expenses (e.g., in the form of higher administrative burdens).
Language practitioner	An interpreter or translator.
Language services sector	Interpreting and translating sector which includes language practitioners, language service providers (LSPs) and peak bodies.
Latent demand	Interactions where an interpreter is required but has not been requested, either by the service provider or individual. This could result in interpreting being undertaken on an ad hoc basis by friends and relatives, or not used at all.
Low English proficiency	The scope of this report is limited to languages services for foreign languages. Therefore, low English proficiency is defined as overseas born individuals with either no English proficiency or limited English proficiency over the age of five. This means that Auslan and First Nations languages have not been considered in this report.

Low quality language services	Interactions where a language practitioner is provided but the service is of low quality, resulting in poor outcomes for the individual with limited English proficiency.
NAATI certification / NAATI credential	Interpreters and translators with all types of NAATI credentials including certified conference interpreter, certified specialist legal & health interpreter, certified interpreter, certified provisional interpreter, recognising practising interpreter, recognised practising translator, certified advanced translator and recognised practising translator
Social costs	The costs borne indirectly by third parties through the provision of sub-optimal interpreting, and includes non-monetary costs. For instance, this can include reduced quality of life or psychological distress.
Sub-optimal interpreting	'Lower bound': instances of low quality language services and unfilled demand. 'Upper bound': instances of low quality language services, unfilled demand and latent demand.
Top-down	An estimation method adopted where detailed information is not available and involves using high-level figures to arrive at the estimates, in this context this involves using total earnings and total hours worked as a language practitioner in a single year.
Unfilled demand	Instances where an interpreter has been requested, but it was not filled by LSPs due to interpreter unavailability.
Unmet demand	Instances of unfilled demand and latent demand. Interactions where a language practitioner was not used.

Executive summary

Increased rates of 'sub-optimal' language service provision

One in five Australians (or 22%) speaking a language other than English at home.[1] Given the high levels of migration and language diversity, the language services sector (which includes both interpreting and translation services) is vital in supporting the 700,000 people with limited or no English proficiency (over the age of five)[2] in accessing essential services such as government services, medical aid and legal advice.

Despite the importance of the language services sector, the sector is reported as experiencing persistent issues relating to workforce sustainability, quality of service provision, recognition for the role of language services, and the potential inefficient allocation of existing resources. According to the *Multicultural Framework Review*, these issues have contributed to a decline in the size and quality of the workforce.

The best available data suggests there were 5,799 people primarily working as interpreters and translators in 2021. The workforce reduced by 1% between 2016 and 2021, despite a 6% increase in the number of persons with low English proficiency over the same period. Conceivably, a workforce of this size could still support up to eight hours of language service provision for each person with low English proficiency per annum. However, this is likely to be insufficient when considering the average individual requires 20 instances of interpreting per annum.[3,4]

Even when users can access language practitioners, issues are faced regarding the quality of provision. Based on the *Department of Home Affairs Language Sector Sustainability Survey*, 45% of respondents said they were aware of instances of poor-quality interpreting, with a third (32%) reporting it to occur often or very often.

These workforce issues have increased the prevalence of 'sub-optimal interpreting'[5], which result in significant economic and social costs for the Australian Government and broader society.

Scope

In 2023, the Department of Home Affairs engaged Deloitte Access Economics to estimate the economic and social costs of sub-optimal interpreting services in Australia (the '2023 report'). This research found that sub-optimal interpreting was associated with an estimated annual economic and social cost ranging from $326 million to $892 million in 2023.[6] The highest costs are expected to result from inadequate service provision in public hospitals and health services, with increased length of hospitalisation as the key cost driver.

For this project, the Department of Home Affairs has engaged Deloitte Access Economics to extend the analysis and expand the case for the Australian Government to address the prevalence of sub-

[1] 2021 Census of Population and Housing
[2] The umbrella term 'low English proficiency' is used in this report to capture people with limited or no English proficiency.
[3] The average person visits the GP 7 times per annum, which should be supported with access to an interpreter. The average person would also require language assistance 13 times per annum for non-medical issues (including speaking with Government, translating written documents, and speaking about housing). Estimated using Building a New Life in Australia: The Longitudinal Study of Humanitarian Migrants data.
[4] Assuming a perfect match between the languages spoken by interpreters and translators, and the languages spoken by people with low English proficiency.
[5] Sub-optimal interpreting captures instances where (1) people are unable to access interpreters or (2) work with low-quality interpreters.
[6] Deloitte Access Economics (2023), Economic analysis of interpreting services: Final report. Report for Department of Home Affairs. The estimated costs were limited to analysis of the following case study sectors: (1) Aged care, (2) Legal, (3) Humanitarian Settlement Program, (4) Public hospitals and health services (QLD), and (5) Services Australia.

optimal interpreting and the potential risks and costs of inaction. This work is organised around the following research questions:

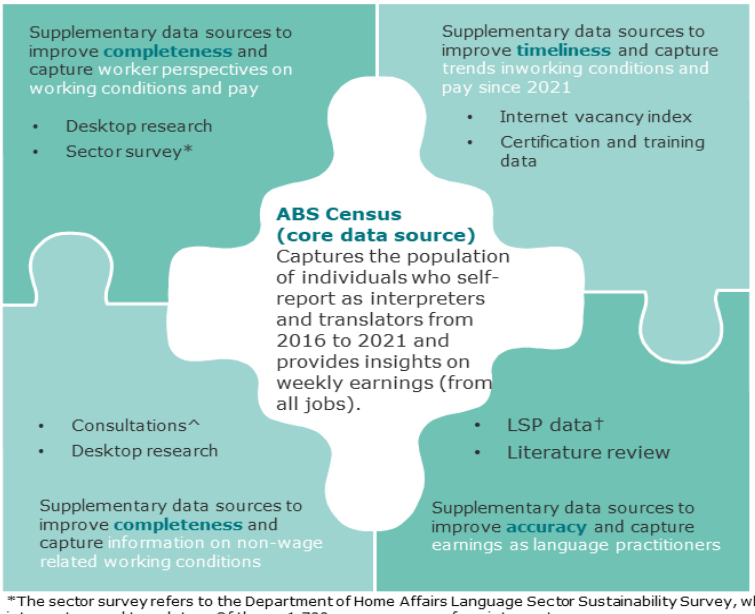
1. What are the prevailing wages and employment conditions for interpreters and translators, and how do wages and employment conditions compare to workers in other comparable occupations?
2. How are past and current trends in interpreter and translator wages and conditions likely to affect future worker supply?
3. What are the current economic and government costs associated with the existing provision of interpreting, when considering a fuller set of costs beyond those captured in the 2023 report, and how would future workforce supply trends affect these costs?
4. What are the potential benefits of improving wages and conditions for interpreters and translators?[7]

In addition to the original four research questions, the work also considers:

5. What are the potential levers that would support improved wages and conditions for interpreters and translators?[8]

Given a lack of comprehensive wage and workforce data for interpreters and translators, this work collates and integrates evidence across a range of primary and secondary data sources (Figure i). The Australian Bureau of Statistics (ABS) Census is used as the central data source, and supplemented with a range of other sources where there are limitations in the completeness, timeliness or reliability.

Figure i: Evidence sources underpinning analysis



*The sector survey refers to the Department of Home Affairs Language Sector Sustainability Survey, which captured over 2,200 responses from interpreters and translators. Of these, 1,700 responses were from interpreters.
^Consultations were held with stakeholders (including peak bodies and LSPs) to understand working conditions in the sector.
†Aggregated administrative data from seven LSPs and two government departments on the use of interpreters, representing 1.5 million occasions of interpreting in 2022.

Source: Deloitte Access Economics (2025).

[7] The original research question was 'What are the implications of introducing a pay band or pay floor?'. The question has been updated based on subsequent consultations with the sector as a draft language services national award has been proposed, with the proposed rates below existing pay rates, which would have had limited implications.
[8] This research question originates from the *procurement strategy* report, which identifies a range of procurement and non-procurement levers that support a more sustainable sector – including improving workforce sustainability.

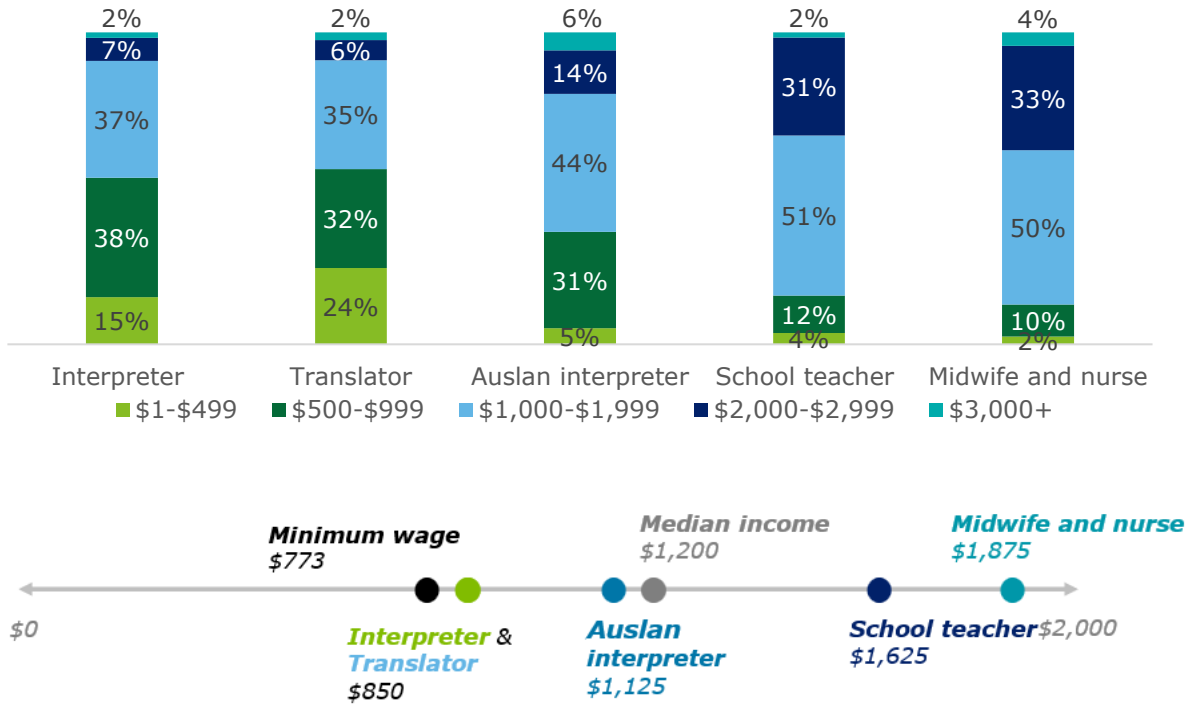
Findings with respect to research question 1: Inadequate pay and lack of career opportunities (relative to other occupations) are key factors driving a decline in workforce supply.

Over 70% of surveyed interpreters and translators report earning less than the minimum wage (estimated to be $40,200 in 2021) from their provision of language services, with the share even higher for recent graduates.[9,10] This is despite interpreters and translators being more experienced and highly qualified on average compared to the general workforce.[11]

While median weekly earnings for interpreters and translators are higher when considering their income from all sources of employment, it remains significantly lower (42%) compared to Auslan interpreters, school teachers, midwifes and nurses (for example), which are considered 'comparable occupations' in terms of workforce composition (gender, age and skill level) and nature of employment (i.e. where essential services are provided).

Lower weekly earnings for interpreters and translators relative to the comparable occupations (Chart i) are driven by a combination of (i) higher rates of part-time employment, and (ii) lower 'effective' hourly wages (i.e., their hourly wages after accounting for travel and down time between assignments).

Chart i: Weekly earnings comparison across interpreters and translators and other comparable occupations, 2021



Source: Australian Census (2021)

Only 26% of interpreters and translators work full-time, versus 49% of workers in comparable occupations. While some workers (especially late career workers, and mid-career workers with

[9] Jim Hlavac, Shani Tobias, Lola Sundin, Simon Knowles, Alex Avella Archila, *Translators' and interpreters' engagement with professional development in Australia: An analysis of key factors* (2024), Vol (16), *Translating & Interpreting*, 142

[10] RMIT, 'Assessing career pathways and the viability of the Translator and Interpreter professions', Translators & Interpreters Australia, (2023), <https://ausit.org/blog/assessing-career-pathways-and-the-viability-of-the-ti-profession/

[11] 56% of interpreters and translators are aged over 50 relative to 30% of the general workforce. 67% of interpreters and translators hold a Bachelors and above qualification relative to 36% of the general workforce.

caring responsibilities) may value the flexibility, nearly half (47%) of interpreters and translators report being dissatisfied with the number of hours worked, with the current low hours worked driven largely by the prevalent employment model (Box i).

Hourly wages for language practitioners are similar to comparable occupations at face value ($52 versus $51).[12] However, as interpreters and translators are predominantly employed in casual / contractor roles and only paid for their active assignment time, their 'effective' hourly wage is only $35 per hour, or 31% lower relative to the comparable occupations.[13]

Among practitioners considering leaving the sector, the key drivers of this decision are associated with poor renumeration, insecure employment, and a lack of opportunities for career advancement (particularly among early to mid-career practitioners).[14] The lack of career advancement opportunities is highlighted by the relatively flat wage scale, with limited recognition of experience and qualification level in the pay structure. This results in language practitioners with bachelor level qualifications earning similar or lower average hourly wages to those with an advanced diploma (a lower-level qualification).[15]

The prevalence of contractor and casual employment arrangements also contributes to (i) limited training and development opportunities, and (ii) limited access to, or awareness of Occupational Health & Safety (OH&S) supports, which can be critical as interpreters are often exposed to stressful assignments. Further details on non-wage conditions for language practitioners are given in Section 3.6.

Box i: Employment model within the language services sector

Typically, individual Australian, State and Territory Government Departments contract with their preferred Language Service Providers (LSPs) to deliver language services. There are over 23 Government and privately owned LSPs with total contracts worth $500,000 or more from 2019 to 2023 with the Australian Government.

Typically, individual interpreters and translators are employed as contractors or casual workers by LSPs, with the average interpreter in the Department of Home Affairs *Language Sector Sustainability Survey* reporting that they worked with four LSPs within a three month period.

Based on the consultations, LSPs post individual language service assignments as requested by Government, and interpreters and translators sign up for the assignments, typically competing on the speed they respond to the booking request from the LSP, rather than skills or experience.

Language practitioners are paid for each completed assignment. Based on the LSP data, the pay for an assignment typically differs by (i) whether it is business hours or after hours, (ii) the mode of interpreting (in-person versus telephone), and (iii) LSP. There is limited differentiation in pay based on qualifications or experience level.

[12] The hourly wage is calculated using a top-down approach using the Census and is estimated based on a weighted average of the interpreter and translator hourly wages. A consistent approach has been adopted to estimate the hourly wage for comparable occupations.
[13] The 'effective' hourly wage is calculated based on an average of the top-down and bottom-up 'effective' hourly wages, estimated to be $39 and $31 respectively.
[14] Department of Home Affairs, Language Sector Sustainability Survey, 2023.
[15] ABS Australian Census, 2021.

Findings with respect to Research question 2: Since 2021, there is evidence of an accelerated decline in the workforce. If this continues, there would be between 310 and 1,400 fewer language practitioners by 2035 (representing 5-34% of the current workforce), with the exit driven disproportionately by NAATI-certified language practitioners.

There is strong evidence in the literature to suggest that pay, stable working hours and career progression opportunities are relatively more important for early (19-29) and mid-career (30-49) workers compared to late career workers (50 and over).[16]

Current pay and working conditions appear to be disproportionately affecting (the career decisions of) younger workers, as reflected in the workforce trends analysis. While the late career workforce increased by 8% from 2016 to 2021, the early career workforce declined by 26%, and mid-career workers only increased by 1% over the same period.[17]

Since 2021, wages for language practitioners have grown at a slower pace than inflation, eroding real wages and increasing cost of living pressures.[18] This coincides with evidence that the workforce has been declining at a faster rate since 2021, with:

- Reduced levels of Vocational Education and Training (VET) commencements for the Diploma and Advanced Diploma of Interpreting and Translating since 2021
- Lower rates of National Certification Authority for Translators and Interpreters (NAATI) recertification since 2023
- Greater instances of 'labour shortage' (as measured by the Internet Vacancy Index or IVI) for social professionals since 2021 compared to the general workforce.[19]

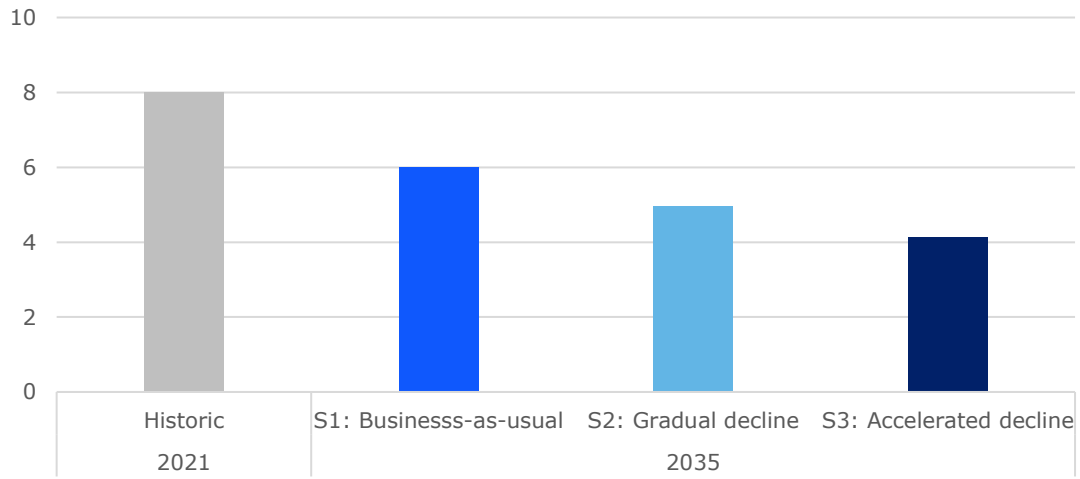
Without positive change, workforce supply seems likely to continue falling over the next decade, while also risking the on-average quality of the remaining workforce (at least as proxied by the interpreters and translators with NAATI certification).[20] Given uncertainty over the future trajectory, three potential scenarios to demonstrate how workforce supply could change are presented. Further details on the assumptions and parameters underpinning the scenarios are given in Chapter 5.

- **Scenario 1 'business-as-usual':** The sector maintains its current wage and conditions differential with other occupations. Under this scenario, total workforce supply is projected to decline by 0.2% per annum from 2024 to 2035, while the NAATI-certified workforce is expected to decline by 0.8% per annum.
- **Scenario 2 'gradual decline' (central case):** Where the wage and conditions gap between the sector and other occupations continues to gradually grow larger over time.[21] Under this scenario, workforce supply is projected to decline by 1.9% per annum from 2024 to 2035, while the NAATI-certified workforce is expected to decline by 2.5% per annum.
- **Scenario 3 'accelerated decline':** Where additional factors on top of the growing wage and conditions gap contribute to faster rates of exit from the sector. For instance, this could include damage to the prestige of the sector, certification changes, or other barriers to entry. Under this scenario, workforce supply is projected to decline by 3.5% per annum from 2024 to 2035, while the NAATI-certified workforce is expected to decline by 4.1% per annum.

[16] See Section 2.4.1 for further details.
[17] ABS Australian Census Longitudinal Dataset, 2016 to 2021.
[18] From 2021 to September 2024, assuming no changes in pay rates, real wages would have fallen by 16% (ABS, 2024).
[19] Interpreters and translators account for 35% of social professionals. Other occupations within the social professionals occupation include historians and other social professionals not elsewhere classified (e.g., anthropologist, archaeologist, geographer, linguist).
[20] NAATI-certified workforce includes: interpreters who are certified, certified provisional, or recognised by NAATI.
[21] With an additional difference of one percentage point per annum. For instance, if wages in other occupations grew by 2% per annum, compared to 1% for language practitioners.

By 2035, the projected workforce supply would only be able to support between four to six hours of language service provision per annum for each person with low English proficiency, further decreasing from the already low eight hours per annum.

Chart ii: Potential annual hours of language service provision hours per person with low English proficiency, 2021 and 2035



Source: Deloitte Access Economics (2025).

Findings with respect to Research question 3: A decline in the number and quality of language professionals, combined with rising demand for language services, would result in an annual economic and social cost of up to $2 billion for Australia by 2035.

The $326 million to $892 million economic and social cost of sub-optimal interpreting estimated in the 2023 report captures the more immediate outcomes associated with instances of sub-optimal interpreting in the delivery of Government services. For instance, this includes (i) increased throughput time, length of hospitalisation and re-admissions in the health setting, and (ii) delayed cases, remitted cases and appeals in the legal setting.

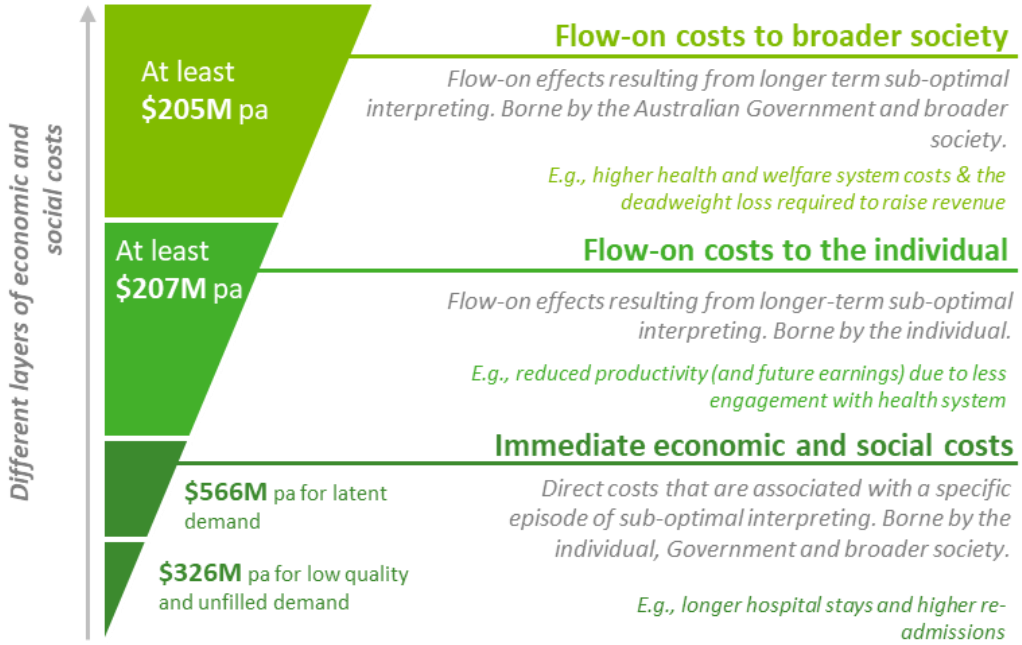
However, repeated exposure to sub-optimal interpreting (and translated materials) is also likely to result in flow-on effects beyond the direct interaction with the associated government/social service. Focusing on the health setting as an example[22], difficulties in accessing language services and/or poor experiences with language services could lead individuals with limited English to disengage or lose trust in the health system altogether. This would subsequently result in:

- **Flow-on costs to the individual:** in the form of worse health outcomes. When considering lost earnings from reduced participation, employment, and productivity, this is estimated to cost $207 million per annum.
- **Flow-on costs to broader society:** which captures additional costs for Government, including health system costs, welfare payments (due to reduced earnings potential), and the cost of raising additional taxation. This is estimated to cost $205 million per annum.

[22] While flow-on costs are also likely to exist in other settings, they have not been quantified. In education, reduced engagement by families due to limited ability to communicate with teachers is associated with worse student outcomes. In the legal setting, underreporting of crimes due to perceived language challenges could lead to escalation, resulting in more serious crimes in the future. For instance, Taylor (2006) found that low English proficiency was directly related to lower reporting rates for shoplifting and burglary among businesses. Other studies including Ranapurwala et al. (2016) and Schneider (2005) suggest that underreporting of less serious crime may facilitate future serious offending (noting that this may not be a causal pathway).

When considering these flow-on effects, sub-optimal interpreting results in an economic and social cost of $738 million to $1.3 billion for 2023 (Figure ii). Further details on the approach and underlying assumptions are given in Section 6.1.

Figure ii: Current annual economic and social costs of sub-optimal interpreting (2023)



Source: Deloitte Access Economics (2025). Note: immediate economic and social costs capture all government services including (i) health, disability and ageing, (ii) immigration, (iii) taxation and (iv) legal and (v) Services Australia. In contrast, flow-on costs only capture (i) the health sector.

Without positive changes, the economic and social costs of sub-optimal interpreting are expected to grow over the next decade as a reduced workforce supply adds further pressure alongside a growing population of people with low English proficiency.[23] A smaller workforce will lead to increased instances of unmet demand, while a less NAATI-certified workforce is expected to increase the frequency of low-quality interpreting.

From $1.3 billion in 2023, the annual costs of sub-optimal interpreting are expected to grow to between $1.6 billion (S1: business-as-usual) to $2.0 billion (S3: accelerated decline) by 2035, with a central estimate of $1.9 billion (S2: gradual decline).[24]

[23] In the 2023 report, Deloitte estimates that demand for interpreters – as proxied by the population with low English proficiency – is expected to grow by 1.8% per annum over the next decade.
[24] To estimate the costs of sub-optimal interpreting over time, Deloitte uses the 2023 costs as the starting point, and grows the costs by the difference in demand and supply growth rates relative to 2023 levels. For instance, a 10% in demand alongside a 3% fall in supply for a given year would result in a 13% increase in the demand-supply gap relative to 2023 levels. This consequently translates to a 13% increase in annual costs.

Research question 4: Improved pay and conditions could help reverse the decline in workforce supply, resulting in cumulative economic and social cost savings of $2.7 billion (scenario 1) to $5.3 billion (scenario 3) over the decade.

Given the strong evidence in the literature on the relationship between wages and workforce supply,[25] Deloitte Access Economics has developed a stylised 'Scenario 4' to illustrate the effect of improved pay for interpreters and translators on workforce supply.

- **Scenario 4 improved pay and conditions:** The sector is able to achieve pay parity with comparable occupations, with a 50% increase in *hourly effective earnings* over four years. This would be achieved through a combination of higher hourly wages and increased access to permanent positions that have non-wage entitlements.

Box ii: A 50% increase in effective hourly wages over four years

The modelling considers a scenario where hourly effective wages for language practitioners increase by 50% over four years. Recent Enterprise Bargaining Agreements have seen sizeable pay increases, ranging from a 28% increase for Victorian nurses and midwives to a 40% increase for NSW police.

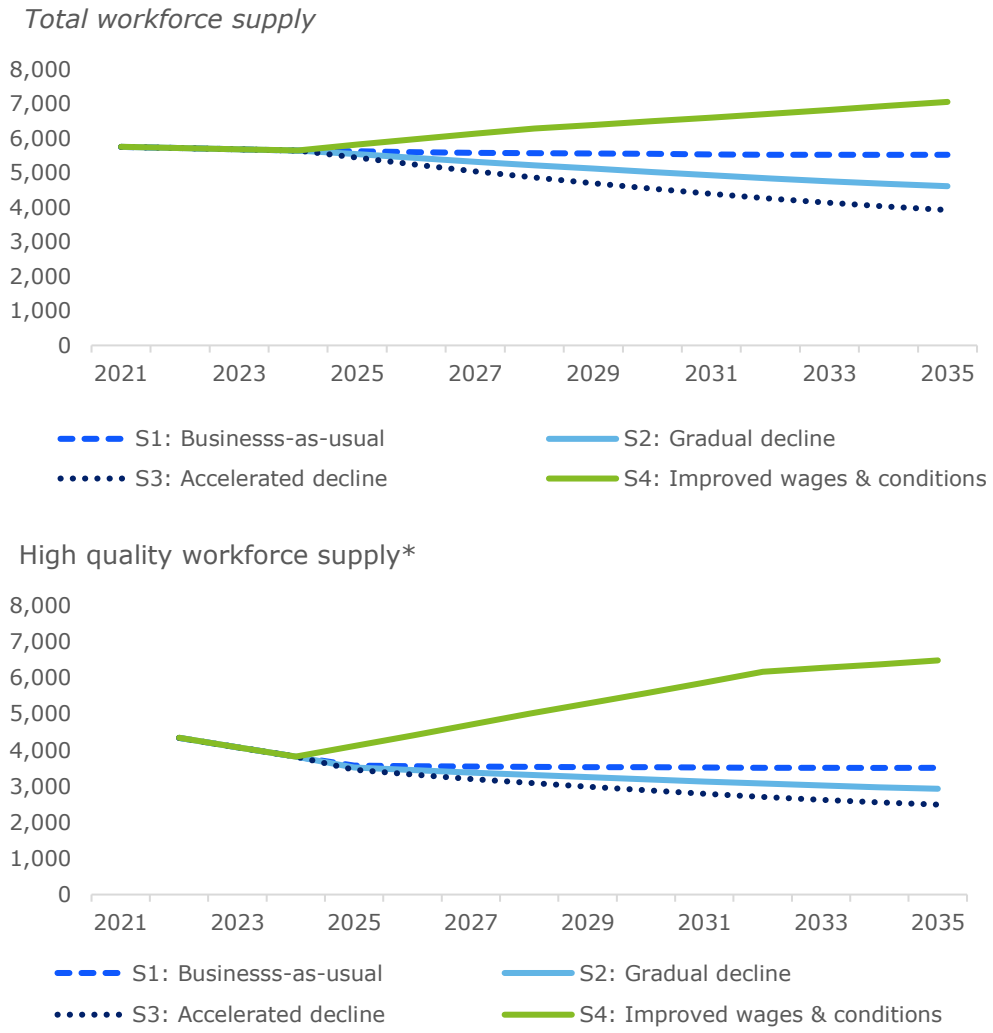
While the 50% increase remain higher than the above recent examples, it can be partially supported through non-wage entitlements as well. For instance, shifting language practitioners to permanent positions would give them access to various benefits (e.g., leave), which would be equivalent in value to a 25% effective earnings increase (as benchmarked against the casual loadings). Consequently, only a 25% in wages relative to current levels would be required to achieve a 50% increase in the effective hourly wages.

This is expected to result in the existing workforce increasing their hours worked, fewer exits by language practitioners into other occupations, and an increased number of workers attracted from other occupations or through studies. In scenario 4, total workforce supply is projected to grow by 1.9% per annum from 2024 to 2035, while the NAATI-certified workforce is expected to grow by 4.8% per annum. A comparison of total workforce supply and the NAATI-certified workforce supply across the four scenarios is given in Chart iii.

Under this scenario, growth in the interpreter and translator workforce supply is expected to keep pace – and marginally surpass – growth in demand for language services.

[25] Using analysis by Kalb (2010) and the typical profile of interpreters and translators, each 1% increase in relative wages for interpreters and translators (relative to other occupations) is associated with a 0.37% increase in labour hours supplied.

Chart iii: Trajectories for interpreter and translator workforce supply (2025 to 2035), *effective* headcount^

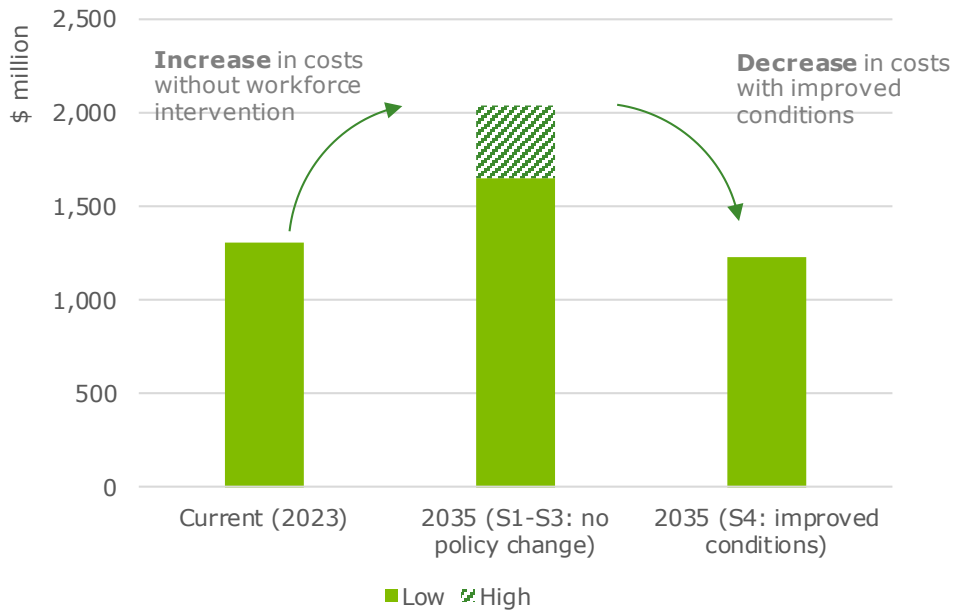


Source: Deloitte Access Economics (2025). *NAATI-certified workforce includes: interpreters who are certified, certified provisional, or recognised by NAATI. NAATI-certified workers as a share of total workforce estimated based on select LSP data on the proportion of interpreting assignments delivered NAATI-certified interpreters. ^Based on the average hours worked by a current worker.

If scenario 4 were achieved, this will mean the upper bound costs of sub-optimal interpreting is $1.2 billion in 2035.[26] This represents an annual cost saving of between $420 million (scenario 1) and $810 million (scenario 3) for individuals, Australian Government and broader society relative to the no policy intervention scenarios (Chart iv) by 2035.[27] As the benefits of improved workforce compound over time, this is expected to result in cumulative undiscounted economic and social cost savings of between $2.7 billion (scenario 1) and $5.3 billion (scenario 3) over the next decade relative to no intervention scenarios.

[26] Similar to the process for projecting annual economic and social costs for scenarios 1-3, the costs for scenario 4 are estimated based on the projected change in the demand-supply gap relative to 2023 levels. As the demand-supply gap is expected to decrease (as demand is expected to grow slower than supply), total economic and social costs are expected to be lower – albeit still significant – relative to 2023 levels.
[27] The annual cost savings are calculated as the difference in projected economic and social costs under scenario 4 in 2035 compared to the costs under scenario 1 (lower bound) and scenario 3 (upper bound) respectively.

Chart iv: Upper and lower bound economic and social costs associated with sub-optimal interpreting (2023 dollars), including latent demand



Source: Deloitte Access Economics (2025).

Findings with respect to Research question 5: To achieve improved pay and conditions, a range of procurement and non-procurement levers beyond the national award is likely to be required.

While the introduction of a national award can be one avenue for improving pay and conditions, it is uncertain whether *minimum* standards alone would be sufficient to achieve parity (relative to midwives and nurses, school teachers and Auslan interpreters) in pay and conditions for interpreters and translators. A broader range of changes are likely required to achieve an effective language services sector and generate greater economic and social cost savings.

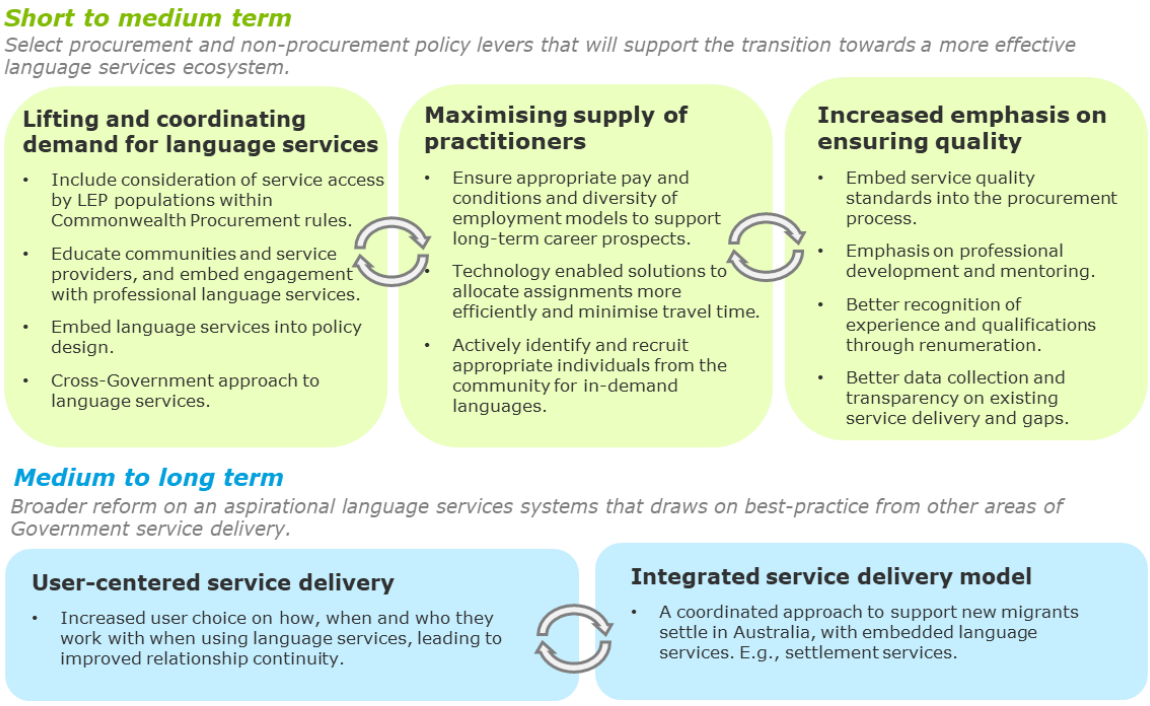
In the short to medium term, a range of complementary procurement and non-procurement levers should be investigated. Select levers are given in Figure iii, with the full set of levers aimed at supporting sector sustainability in the short to medium term outlined in the *procurement strategy* report. These levers have been developed through consultation with the sector, and best practice examples of workforce strategies from other sectors and jurisdictions.

Together, these levers could enable the following improvements for the language service sector:

- Lift and coordinate demand for language services. This will both directly reduce instances of latent demand, and indirectly support employment models and conditions that are required for a sustainable workforce by ensuring there is sufficient demand for full-time language practitioner roles.
- Maximise supply in line with demand. While improved pay and conditions can attract and retain quality language practitioners, this should be supplemented by technology levers that would enable the more efficient use of the existing workforce by reducing travel times between assignments.
- Ensure mechanisms are in place to assure the quality of language services provided, and support the sector to continually invest in quality, training and development.

In the longer term, systematic changes that centre the user, and provide more choice in accessing language services in an integrated manner would help ensure better access to high quality Government services and unlock the full economic and social potential of people with low English proficiency.

Figure iii: Broader levers required to reduce economic and social costs of sub-optimal interpreting



Source: Deloitte Access Economics (2025).

This work builds on the research undertaken in 2023 and expands the evidence base in three key areas:

- Establishing a more accurate estimate of current economic and social costs of sub-optimal interpreting.
- Understanding the current state of the language services workforce including pay and conditions.
- Developing potential future trajectories for how the workforce could develop over the coming decade.

Together, the work establishes a clearer case for the Government to address the prevalence of sub-optimal interpreting. However, while the modelling relies on the best available evidence, key limitations remain:

- Language services demand and supply are considered in aggregate, although each language should ideally be considered separately as language practitioners cannot easily switch between languages.
- Language service demand is assumed to be driven by population growth for people with low English proficiency. The work does not consider other potential drivers, including (i) the potential impact of Artificial Intelligence on demand for language practitioners, and (ii) the ageing population and changing frequencies and contexts in which language services may be required.
- While the modelling considers the benefits from a stylised pay and conditions uplift scenario, the potential costs associated with the scenario has not been considered.

Further work – supported by improved data collection – is required to understand potential future workforce challenges for specific regions and languages, and identify the specific policies that are most likely to deliver the greatest *net* benefits for Australia.

1 Introduction

This chapter overviews the characteristics of the language services sector and workforce, including the key issues currently facing the sector before setting out the objectives for this project and remaining chapters of this report.

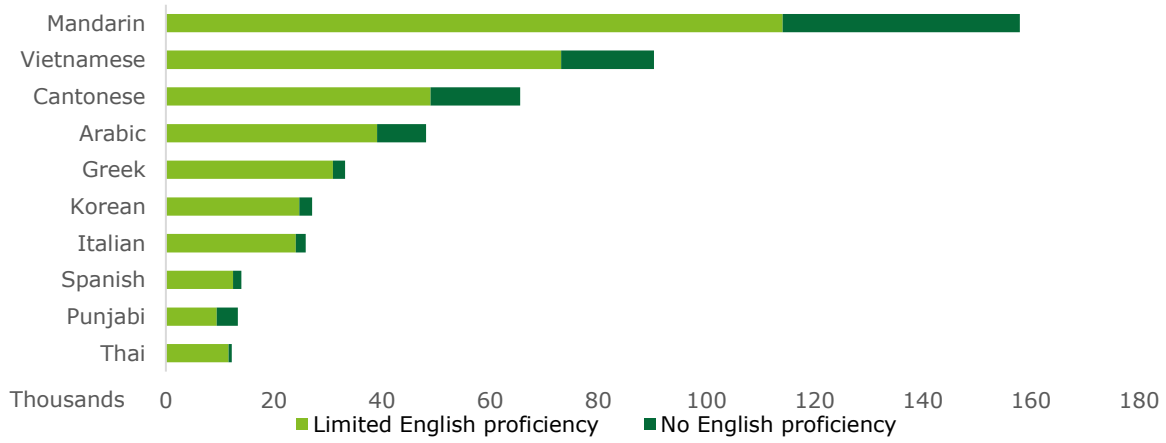
1.1 The role of language services

Australia has one of the most diverse populations in the world with the second highest proportion of foreign-born citizens in the Organisation for Economic Co-operation and Development, reflecting its strong migrant intake.[28] With this comes significant linguistic diversity, with more than one in five Australians (or 22%) speaking a language other than English at home.[29]

While most migrants speak English well enough to participate in economic and civic life, there are a significant portion who have barriers to communicating in English. According to the 2021 Census, there are estimated to be 700,000 people (3% of the total population aged five and over), born overseas, who are living in Australia and have 'low proficiency' in English.[30] Within this cohort, there are more than 140,000 people who do not speak English at all.

Chart 1.1 displays the top ten languages spoken by people with low English proficiency, which account for approximately two thirds of all people with low English proficiency. However, there remains a vast diversity of languages in Australia, with over 200 distinct languages spoken at home per the 2021 Census.

Chart 1.1: Top ten languages spoken by people with low English proficiency



Source: Australian Bureau of Statistics (2021). Sample is taken from overseas born population, over five years of age.

The language services (which includes both interpreting and translation services) sector plays a critical role in facilitating participation and equitable access to essential services such as government services, medical aid and legal advice for people with limited or no English proficiency

[28] Australian Government, Australia is a top 20 country for democracy, diversity and global citizenship, (August 2022) < https://www.dfat.gov.au/sites/default/files/australia-is-a-top-20-country-democracy-diversity-global-citizenship.pdf>
[29] Australian Bureau of Statistics. 2021. Census of Population and Housing.
[30] In this report, 'low English proficiency' is defined as either having no English proficiency or limited English proficiency.

in Australia. For instance, interpreters facilitate the communication exchange between individuals and a range of organisations, including hospitals, general practitioners and courts, while translated materials are a key avenue for disseminating important information to linguistically diverse communities, such as seen during the COVID-19 pandemic.

1.2 Overview of the language services workforce

Noting there is no comprehensive data collection on the language services workforce, data from the Census indicates 5,799 people were primarily employed as interpreters or translators in 2021. This is lower than the 10,400 practitioners that hold some form of National Certification Authority for Translators and Interpreters (NAATI) certification in 2023.[31,32] The difference may be attributed to a combination of factors including:

- individuals no longer actively practicing as interpreters or translators
- limitations in the Census data where respondents are only able to report their primary occupation. Consultations with stakeholders suggest interpreters and translators may work multiple jobs, and work as language practitioners part time.

Language practitioners (interpreters and translators) differ from the general workforce in three key ways:

- They tend to be older on average, with over half of language practitioners aged 50 or over, compared to 30% of the general workforce.
- They are more likely to be female, with over two-thirds of language practitioners represented by females, compared to less than half (48%) of the general workforce.
- They are highly skilled, with over half of language practitioners holding tertiary level qualifications, compared to 37% of the general workforce.

Further details on the characteristics of language practitioners compared to the general workforce are given in Appendix A.2.

Box 1.1: Sufficiency of the existing language services workforce

To assess whether the existing size of the interpreter and translator workforce are sufficient for the population of people low English proficiency, Deloitte Access Economics considers the amount of language service provision that could be potentially provided.

The 5,799 active language services workers are able to approximately provide up to eight hours of language services support for each person with low English proficiency per annum. Or alternatively, there is one interpreter or translator for every 121 persons with low English proficiency.[33] While language usage is likely to differ significantly across individuals, this is likely to be insufficient when considering the average individual requires 20 instances of interpreting per annum.[34]

[31] '2022-23 Annual Report', NAATI, (June 2023), <https://www.naati.com.au/wp-content/uploads/2023/10/NAATI_Annual-Report_2022-23.pdf>
[32] NAATI certification includes certified conference interpreter, specialist legal or health interpreter, certified interpreter, certified provisional interpreter, recognised practicing interpreter, certified advanced translator, certified translator or recognised practicing translator.
[33] Ibid
[34] The average person visits the GP 7 times per annum. According to Building a New Life in Australia, they would also require language assistance 13 times per annum for non-medical issues (including speaking with Government and speaking about housing).

1.3 Key issues affecting the language services sector

The Multicultural Framework Review and other publications by the sector suggest that the current language services sector is not serving the needs of key stakeholders because of issues related to workforce sustainability, low quality service provision, undervaluing language services and inefficient allocation of resources.[35,36] Similar challenges have been identified in the United Kingdom's language services sector.[37]

This leads to the under-utilisation of high-quality, professional language practitioners in supporting people with low English proficiency in accessing key Government and community services, which in turn results in significant economic and social costs to individuals, society and the Government.

In a 2023 study for the Department of Home Affairs, Deloitte Access Economics estimates that that low-quality and unmet demand for interpreting services is associated with an annual economic and social cost of $326 million to $892 million in 2023.[38] These costs are likely to continue to grow into the future, if the identified workforce issues are not resolved.

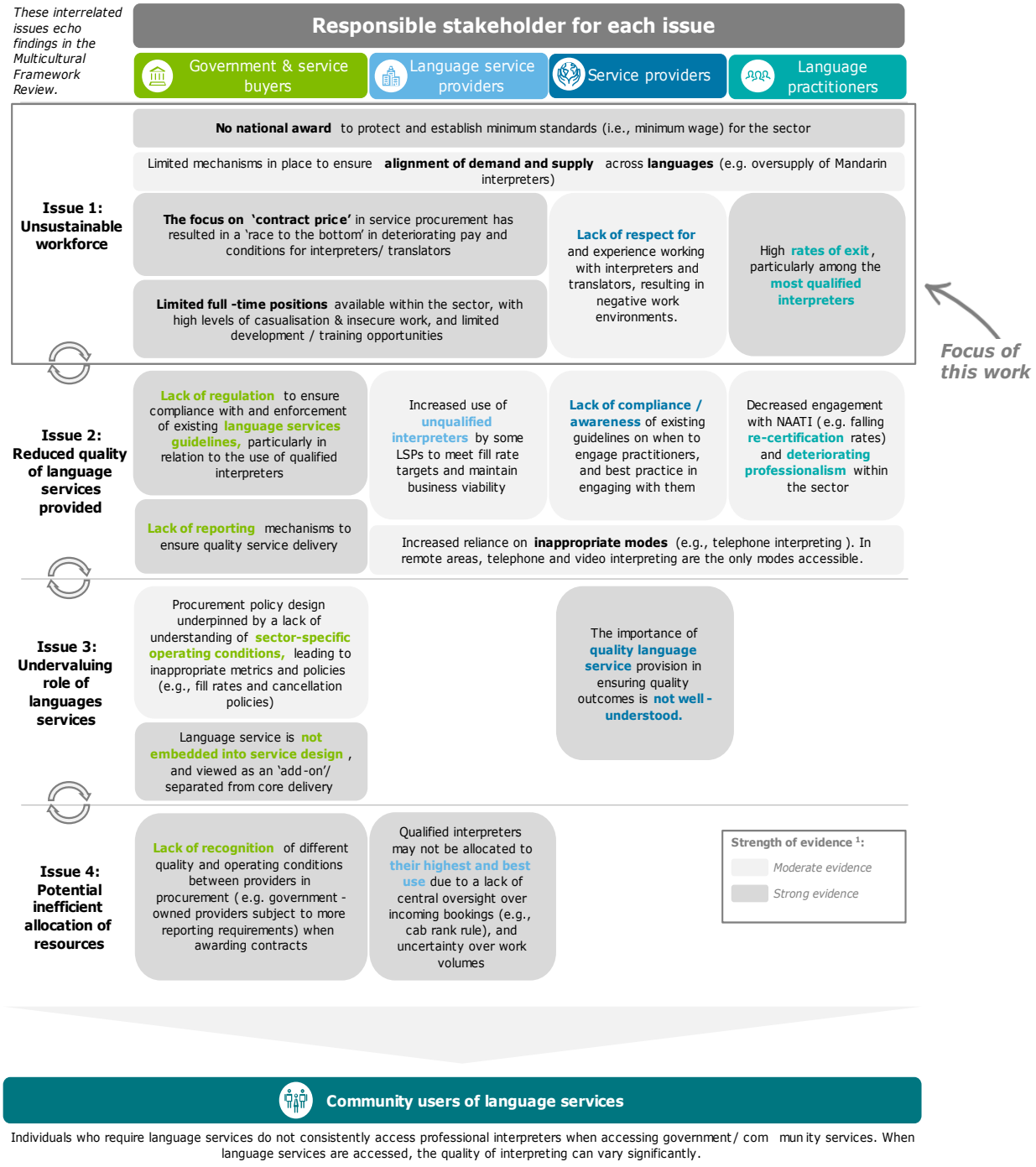
Figure 1.1 summarises evidence from a range of sources, including the Multicultural Framework Review, other desktop research and consultations with stakeholders, on the key issues that affect the future sustainability of the language services sector. There are four interconnected issues, that have been compounded through the combined actions of (i) the Government and service buyers, (ii) language service providers, (iii) government service providers, and (iv) language practitioners:

- **Unsustainable workforce:** current procurement and employment practices have led to high rates of exits by existing language practitioners paired with low rates of entry by new interpreters and translators. Contributing factors include deteriorating wages and conditions, and increased job insecurity.
- **Reduced quality of language services provided:** The absence of industry regulation and accountability mechanisms provide little incentives for LSPs and service providers to prioritise high quality language provision.
- **Undervaluing the role of language services:** Without a comprehensive national language policy, organisations tend to treat language service as an 'add-on' rather than core components of service design and delivery. This approach frequently undermines service quality (issue 2).
- **Potential inefficient allocation of resources:** Poor coordination when allocating interpreter assignments leads to inefficient use of qualified interpreters and may result in unnecessary downtime as interpreters travel between locations.

Together, these issues negatively affect community users' access to language services, and the quality of service provision.

[35] RMIT, 'Assessing career pathways and the viability of the Translator and Interpreter professions', Translators & Interpreters Australia, (2023), < https://ausit.org/blog/assessing-career-pathways-and-the-viability-of-the-ti-profession/>
[36] AUSIT & ASLIAQ, 'Report into engagement and job satisfaction of Queensland spoken and sign language interpreters, (2022), < https://www.refugeehealthnetworkqld.org.au/wp-content/uploads/2023/06/2022-Interpreter-Satisfaction-Survey.pdf>
[37] 'Working Together: Recommendation for tacking the immediate issues facing procurement and provision of language services for the public sector', Association of Translation Companies & professional Interpreters for Justice, (October 2023), <https://atc.org.uk/wp-content/uploads/UK-Language-Services-for-the-Public-Sector-Working-Together-2023.pdf>
[38] Deloitte Access Economics (2023), Economic analysis of interpreting services: Final report. Report for Department of Home Affairs.

Figure 1.1: Key issues affecting the future sustainability of the language services sector



Source: Deloitte Access Economics (2025). Note: (1) The strength of evidence is based on the frequency that these issues were raised in consultations with sector stakeholders. **Service providers** refers to government and non-government organisations that work with language practitioners in providing services to persons with low English proficiency (e.g., hospitals, real estate agents).

1.4 Project context and objectives

It is within this context that the Department of Home Affairs has engaged Deloitte Access Economics to undertake analysis understand:

- Current pay and work conditions in the language services sector, and its role in driving an unsustainable workforce
- How the language services workforce is likely to evolve given trends in pay and work conditions
- The impact of workforce changes for the quality of language services provision, and the resultant costs for the Australian Government and broader society.

This report sits within a broader suite of work that the Department of Home Affairs has engaged Deloitte to undertake. Together, these reports aim to support the Department to build a case for change, and understand the potential risks and costs of existing trends in the language services sector. The broader suite of work includes:

- **Economic analysis of interpreting services (2023):** preliminary analysis on the economic and social costs of sub-optimal interpreting services in Australia, focusing on (1) Aged care, (2) Legal, (3) Humanitarian Settlement Program, (4), Public hospitals and health services (QLD), and (5) Services Australia as case studies.
- **Procurement strategy to drive long term sector sustainability in interpreting and translating services (concurrent):** a procurement solution that can be adopted by Australian Government Departments to help drive long-term sustainability for the language services sector.

1.5 Navigating this report

The remaining report is structured as follows:

- **Chapter 2** outlines the analytical and conceptual frameworks for this work, high-level approach and evidence sources used to inform the analysis.
- **Chapter 3** outlines current wages and working conditions for interpreters and translators, and benchmarks against comparable occupations.
- **Chapter 4** outlines recent trends in the stock and flow of interpreters and translators, and differences across the three age personas.
- **Chapter 5** outlines three potential scenarios for future workforce supply out to 2035 without positive policy changes, using the estimated 2024 worker supply as a starting point.
- **Chapter 6** estimates a broad range of economic costs associated with sub-optimal interpreting, and how they are likely to change in the future. This analysis builds on Economic analysis of interpreting services (2023).
- **Chapter 7** explores the implications of improved wages and conditions on workforce supply, the economy and more broadly society, including the role of establishing a national award and other short and long-term non-procurement policy levers.

2 Approach

This chapter outlines the analytical and conceptual frameworks for this work, high-level approach undertaken and evidence sources used to inform the analysis.

2.1 Research questions

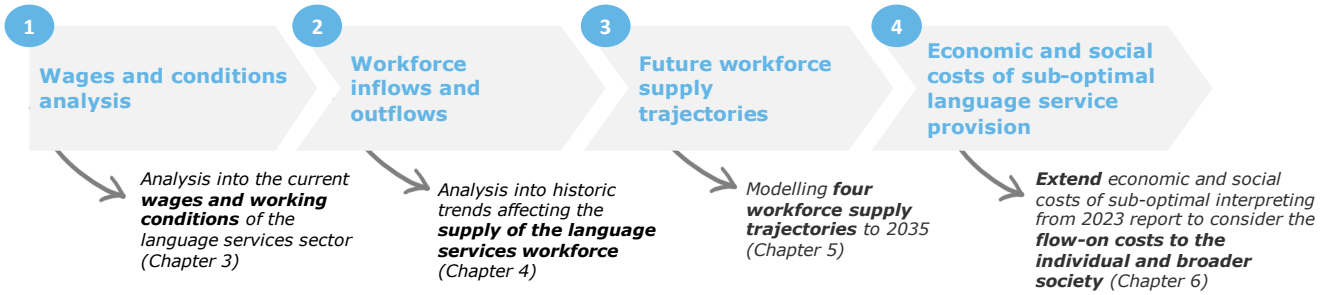
The key research questions governing this work include:

1. What are the prevailing wages and employment conditions for interpreters and translators, and how do their wages and employment conditions compare with those of workers in other comparable occupations?
2. How are past and current trends in interpreter and translator wages and conditions likely to affect future worker supply?
3. What are the current costs associated with the existing provision of interpreting, when considering a fuller set of costs beyond those captured in *Economic analysis of interpreting services* (2023)?
4. What are the potential benefits of improving wages and conditions for interpreters and translators?
5. What are the potential levers that would support improved wages and conditions for interpreters and translators?

2.2 Analytical approach to modelling and analysis

Figure 2.1 overviews the analytical and modelling approach adopted in this work. The approach can be separated into four distinct components which build upon each other: (1) detailed analysis into wages and conditions, (2) historic workforce inflows and outflow trends, (3) future workforce supply trajectories and (4) economic and social costs of sub-optimal interpreting.

Figure 2.1: Analytical approach to modelling and analysis



Source: Deloitte Access Economics (2025)

2.3 Wage and conditions analysis

Individuals may choose to work in a role for a variety of different reasons and circumstances, therefore comparing the average language services professional to an average worker may not provide meaningful insights into workers motivations.

2.3.1 Age personas

Consequently, the analysis distinguishes between **three age-based personas** as working hours and average wages differ by age. See Appendix A.1 for further analysis underpinning the selection of the three age-based personas.

1. An **early career professional,** aged between 15-29 years of age.
2. A **mid-career professional,** aged between 30-49 years of age.
3. A **late career professional,** aged over 50.

Further, evidence from the literature reveals individuals at different stages of their working life possess varying motivations for employment choices. For instance, studies indicate:

- Early career and mid-career workers are more likely to place a greater emphasis on wages and career development opportunities relative to late career professionals.[39,40,41,42]
- All workers value flexibility and work-life balance.[43,44]
- Late career professionals are more likely to prioritise meaningful work over mid-career professionals.[45]

Figure 2.2, on the next page, summarises the available evidence on the factors that workers value during different stages of their working life.

2.3.2 Comparable occupations

In benchmarking the appropriateness of current wages and working conditions for interpreters and translators, it may not be appropriate to compare against all occupations. Consequently, the analysis focuses on **three comparable occupations**, that are most similar to interpreters and translators in terms of worker characteristics (i.e., age, gender and qualifications) and the nature of employment (i.e., essential services).

[39] 'Are you happy at work', SEEK, (2024), <https://www.seek.com.au/career-advice/article/are-you-happy-at-work>
[40] '6 things Gen Z wants from their next job', Handshake, <https://joinhandshake.com/blog/employers/6-things-gen-z-wants-from-their-job/>
[41] Department of Employment and Workplace Relations, Mid-career research, (2022), <https://content.yourcareer.gov.au/sites/default/files/2023-03/Mid-career%20research%20summary.pdf>
[42] PWC, The Future of Work, (2021) <https://www.pwc.com.au/important-problems/future-of-work/what-workers-want-report.pdf>
[43] 'Workplace Benefit Trends by Generation In 2024', Forbes, (2024), <https://www.forbes.com/advisor/business/workplace-benefit-trends-by-generation/>
[44] PWC, The Future of Work, (2021) < https://www.pwc.com.au/important-problems/future-of-work/what-workers-want-report.pdf>
[45] McKinsey & Company, Gen what? Debunking age-based myths about worker preferences (2023) < https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/gen-what-debunking-age-based-myths-about-worker-preferences>

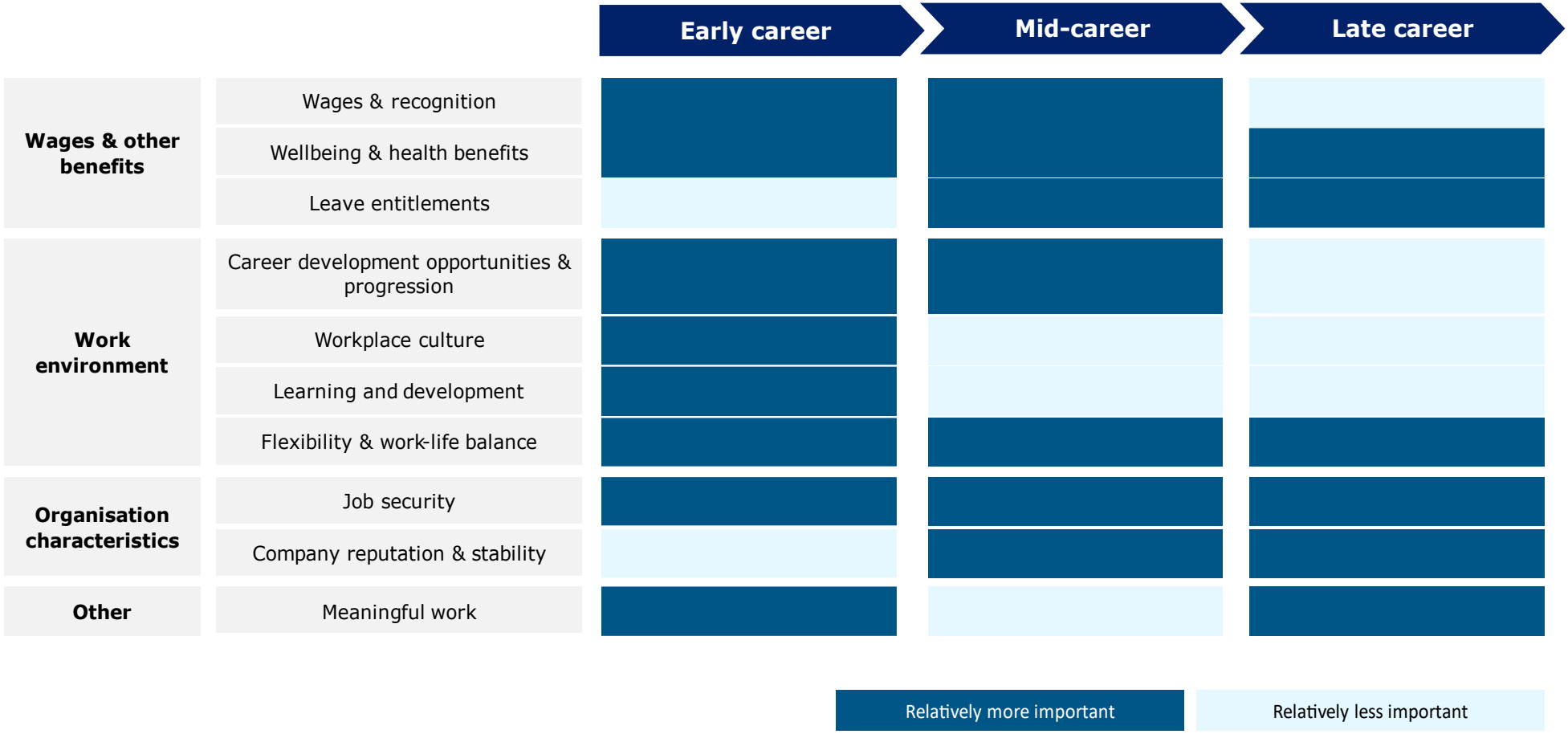
An **Auslan interpreter**

A **school teacher**

A **midwife and nurse**

See Appendix A.2 for further analysis underpinning the selection of the three comparable occupations.

Figure 2.2: Analytical framework of key drivers of workforce inflows and outflows



Source: Deloitte Access Economics (2025)

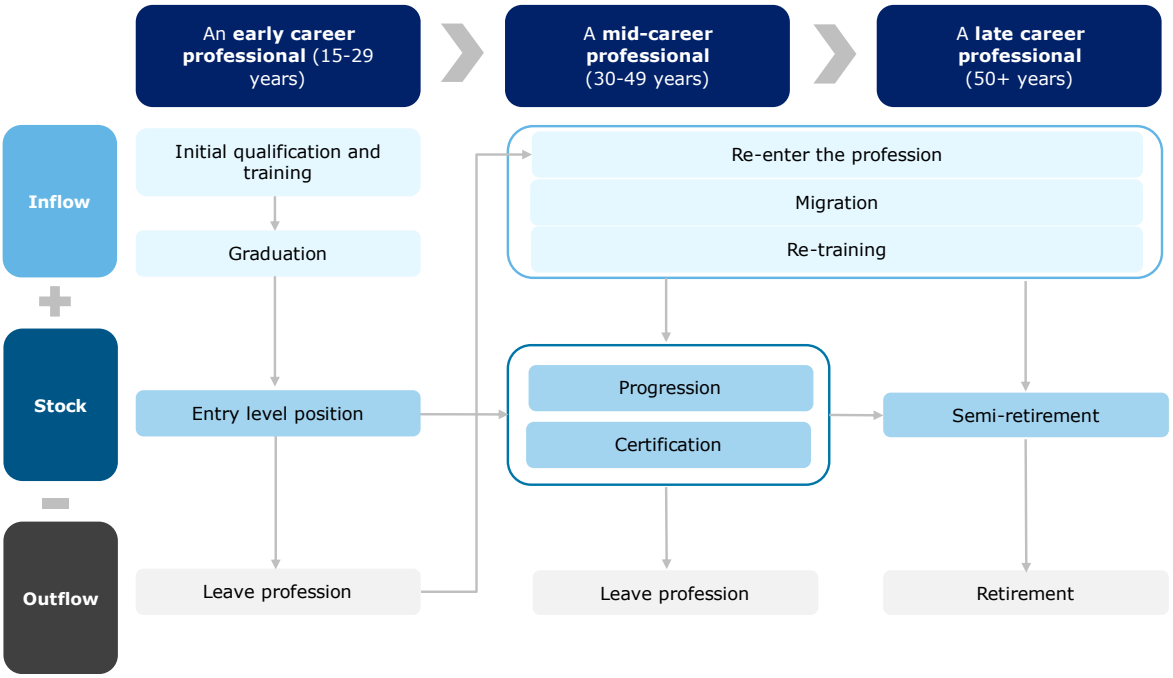
2.4 Workforce supply modelling

2.4.1 Drivers of workforce supply

The expected workforce supply in each period can be estimated as a function of inflows and outflows (or entries and exits). A sustainable workforce requires a balance between different components over time. The language services workforce inflows and outflows by each persona is outlined in Figure 2.3:

- Individuals can join the language services sector as either an early career professional or as mid-career / late career professionals through a career change. In both cases, individuals will typically require training (either initial training or retraining), before subsequently certifying with NAATI.
- Workers will then continue to accumulate experience as language practitioners, recertify with NAATI and remain within the sector and progress to become mid-career or late career professionals. Alternatively, the worker may choose to leave the profession.
- Once an individual leaves the profession, the individual may decide at a later stage in their career to re-enter the profession as a mid-career or late career professional.

Figure 2.3: Determinants of workforce supply (inflows and outflows)



Source: Deloitte Access Economics (2025)

2.4.2 Workforce supply scenarios

Using the stock and flows model of workforce supply, workforce supply is projected based on different assumptions under four stylised scenarios (Table 2.1). The following components differ across the scenarios:

- **Worker inflows and outflows:** this determines the overall interpreter and translator workforce supply.
- **NAATI certification:** is the recognised standard of quality for interpreters and translators', according to tiered assessment levels including (i) certified specialist, (ii) certified, (iii) certified provisional, and (iv) recognised practising.

Further details on the approach, data and methods underpinning the parameterisation of the workforce supply modelling are given in Chapter 5.

Table 2.1: Overview of the stylised workforce supply scenarios

Scenario	Description
Scenario 1: Business-as-usual	The sector maintains its current wage and conditions differential with other occupations. Inflows, non-retirement outflows, and re-certification remain at historic rates. However, retirements are expected to increase, driven by the ageing workforce.
Scenario 2: Gradual decline	Pay and conditions continue to deteriorate relative to other sectors, leading to a gradual decline in the workforce. Re-certification remain at historic rates.
Scenario 3: Accelerated decline	In addition to the deterioration in pay and conditions, other factors contribute to faster rates of exit from the sector. For instance, this could include damage to the prestige of the sector, certification changes, or other barriers to entry. Re-certification remain at historic rates.
Scenario 4: Improved wages and conditions	The sector is able to achieve pay parity with comparable occupations, leading to a growth in net worker inflows, and rates of certification.

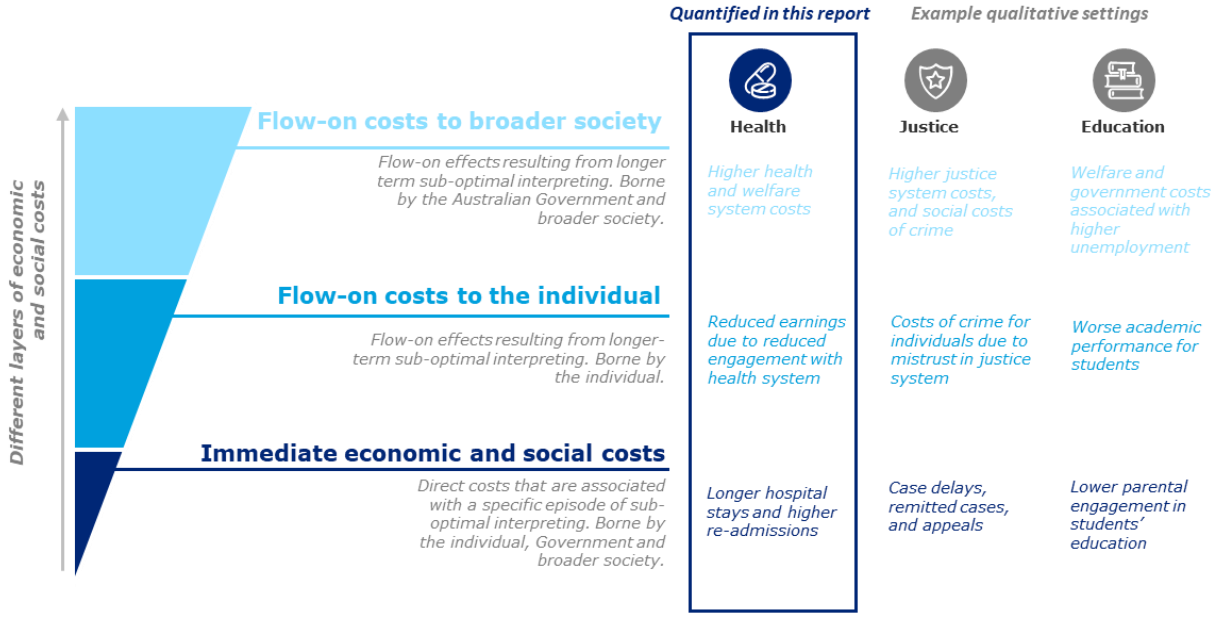
Source: Deloitte Access Economics (2025)

2.5 Economic and social costs of sub-optimal interpreting

Sub-optimal interpreting – which includes both instances where individuals cannot or do not access interpreters and where low-quality interpreting is provided – is associated with a range of direct and indirect economic costs (Figure 2.4).

- **Direct costs** capture the immediate negative outcomes associated with an instance of sub-optimal interpreting. This is the focus of the 2023 report, which found sub-optimal interpreting in the delivery of Government services, to cost the Australian economy $326 million to $892 million in 2023.
- **Indirect flow-on costs** capture the longer-term outcomes associated with repeated exposure to sub-optimal interpreting, which leads individuals to disengage or lose trust in Government services and systems.

Figure 2.4: Different costs associated with sub-optimal interpreting



Source: Deloitte Access Economics (2025)

2.6 Key evidence sources

Given a lack of comprehensive wage and workforce data for interpreters and translators, the analysis draws on a combination of data sources outlined in Table 2.2. While each source presents its own merits and drawbacks, they can be used in combination to triangulate and build an evidence base on trends and drivers in the language services sector.

Table 2.2: Key evidence sources

Data source	Description	Limitations
Australian Bureau of Statistics Census (2021)	Detailed comprehensive overview of the characteristics of all Australians in 2021.	• Does not capture trends after 2021 • Only captures employment characteristics of respondents whose 'main job' is interpreting or translating • Does not isolate earnings from language services provision, and captures earnings across all jobs.
Australian Bureau of Statistics Australian Census Longitudinal Dataset (2016-2021)	Detailed comprehensive overview of the characteristics of all Australians in 2016 and 2021.	
Jobs and Skills Australia Internet Vacancy index (Up to 2024)	Monthly count of online job advertisements by occupation, and is used as a proxy for labour force shortages.	• Cannot identify interpreters and translators, only social professionals, of which 35% are represented by interpreters and translators.
Language Service Provider (LSP) data (2023)	Primary data collected from nine LSPs as a part of the 2023 report, that captures information on (i) the mode of interpreting, (ii) interpreter pay, and (iii) interpreter certification.	• Only captures select LSPs, noting they represent 1.5 million instances on interpreting. • Only captures data for 2022, and cannot be used to identify trends over time.
Department of Home Affairs Language Sector Sustainability Survey (2023)	Survey of over 2,200 interpreters and translators, to capture perspectives on: (i) perceived issues in the sector, and (ii) stated intentions on future attrition.	• Potential selection bias of survey respondents.
National Centre for Vocational Education Research (2023)	Training commencements for Diploma and Advanced Diploma of Interpreting, which is a leading indicator for worker inflows.	• Does not capture data since 2022.
NAATI certification data (2024)	NAATI data on certifications and re-certifications issued (2018-2024)	• Does not capture interpreters and translators without certification • Does not identify active interpreters and translators

The data sources above were complemented with a series of consultations with peak bodies, LSPs and community organisations alongside publicly available literature. The list of consultees is summarised below:

Peak bodies:

- Australian Institute of Interpreters & Translators (AUSIT)
- Australian Sign Language Interpreters and Translators Association (ASLITA)
- National Certification Authority for Translators and Interpreters (NAATI)
- Professionals Australia

Language service providers (LSPs):

- Language Loop

- Australasian Association of Language Companies (AALC)
- 2M Language Services

Community organisations:

- Settlement Services International (SSI)
- AMES Australia

3 Current wages and working conditions

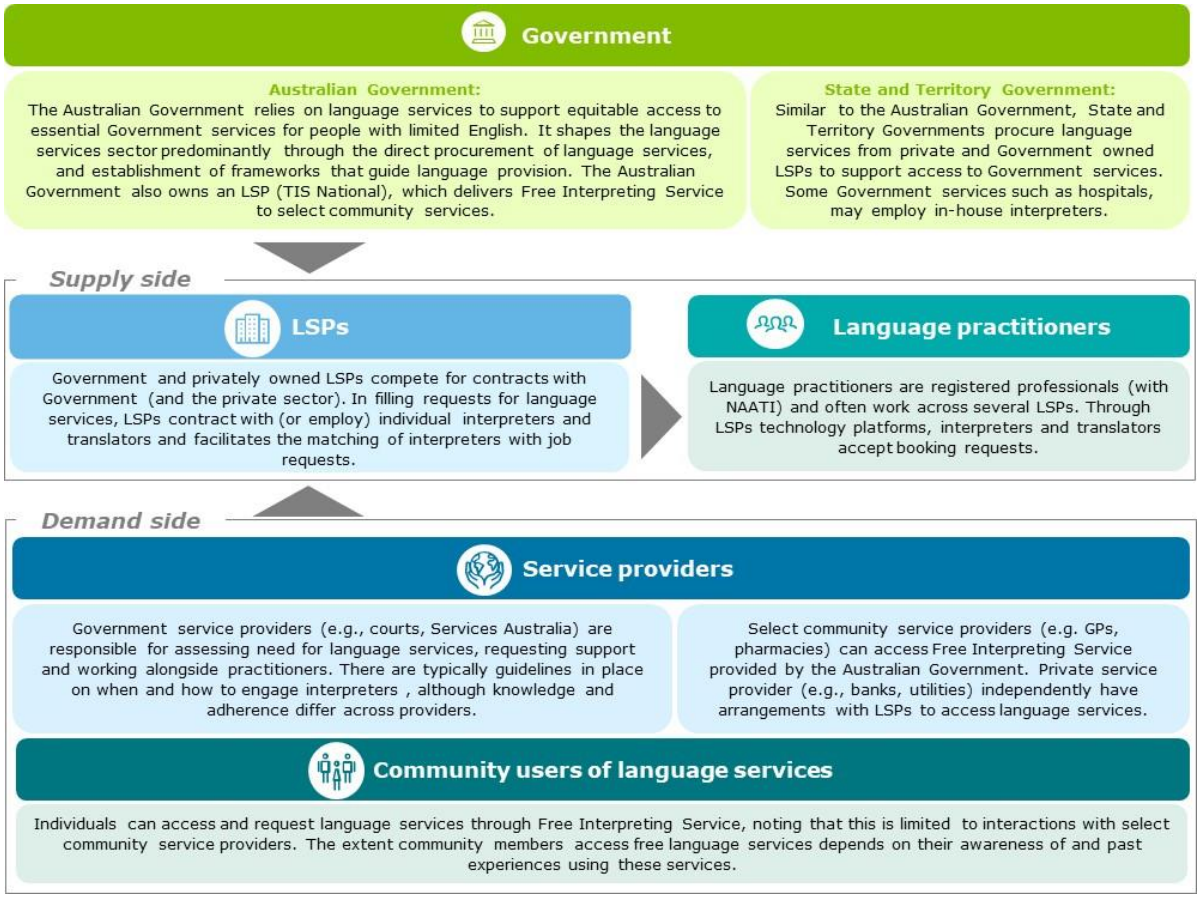
This chapter outlines current wages and working conditions for interpreters and translators, and benchmarks against comparable occupations.

3.1 Current employment model for language services sector

The current language services employment model is underpinned by a series of actors who demand language services (Government service providers, community and private service providers and community users) and those who supply language services (LSPs and language practitioners). Outside demand and supply actors, the Government plays a role in supporting access to quality language services for people with low English proficiency through direct procurement and establishment of frameworks that guide language service provision.

The Government contracts many different LSPs, whose primary role lies in facilitating and coordinating access to language practitioners. LSPs contract many different language practitioners, typically on a casual or contractor basis with no access to typical employee entitlements such as leave. The role of each actor is further explored in further detail in Figure 3.1.

Figure 3.1: Current employment model for language services sector



Source: Deloitte Access Economics (2025).

Given the casualised nature of the employment model, it is common for interpreters and translators to be employed by several LSPs and accept assignments from a variety of LSPs in a single day. This finding is echoed in consultations and available research:

> *"There are very **few full-time positions** available mostly casual or contractor arrangements and interpreters often **work across several LSPs**, which means interpreters have no access to normal employee protections, benefits and entitlements." – Peak body*

> *An RMIT survey of 243 recent interpreting and translating graduates found that 4% of respondents had access to annual leave and sick leave.*

Language practitioners are responsible for structuring their working day by accepting assignment requests. Stakeholders noted this task-based employment model (commonly referred to as the 'gig economy') leads to the inefficient allocation of resources, with language practitioners often not prioritised towards their best and highest use (as noted in Section 1.3).

Under this employment model, language practitioners are typically paid for minimum engagement periods (15-90 minutes) with shorter time increments available where extensions are required (typically in 15-30 minutes allotments). Stakeholders frequently highlighted the reduction in minimum engagement periods overtime, reducing from half to full-day assignments which further exacerbates scheduling inefficiencies:

> *"**Courts used to be minimum half to full day bookings** for interpreters, now its 90 minutes with the option to extend if needed, which creates a lack of income security because interpreters are working fewer hours overall and of course paid less, but it also creates unpredictability in the work and **makes it difficult to perfectly plan/ fill a full working day**." – Peak body*

The level of remuneration provided differs depending on the service delivery mode (e.g., on-site / in-person, phone or video), time of assignment (e.g., business hours, public holidays, outside of business hours), type of assignment (e.g., pre-booked or on-demand) and setting (Government or commercial). Typically, on-site assignments attract a higher remuneration than remote delivery modes to account for travel time. LSPs are responsible for setting their own pay schedules, which can vary significantly between providers. For example, the hourly pay rate for phone interpreting in government settings ranged from $88 to $125 across five separate LSPs in 2023.

While assignments are recommended to be assigned in a tiered manner based on practitioners qualification level (as per the language services guidelines), due to limited supply of adequately trained practitioners, stakeholders indicated assignments are typically made available to everyone (regardless of NAATI certification level) and assigned to the first one to respond.

> *"All the jobs are **broadcast to everyone** and it's a game of fast fingers there is **no prioritisation by qualification level.**" – Peak body*

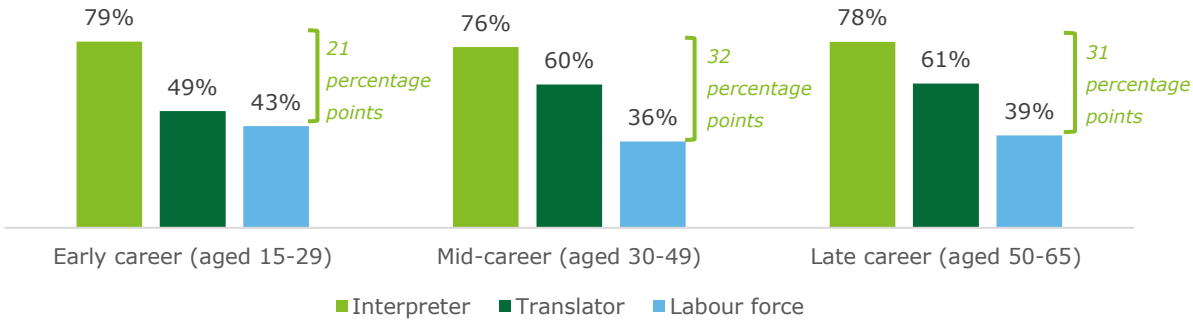
3.2 Weekly average working hours

The current employment model – where language practitioners respond to available assignments – results in high rates of part-time work for language practitioners relative to the general labour force across every age group (Chart 3.1). The gap between interpreters and the general labour force is the largest for mid-career professionals, where interpreters are 32 percentage points more likely to be working part-time relative to the general labour force.

Language practitioners are also more likely to work part-time relative to some comparable occupations, where more than two-thirds (68%) of teachers and more than half of midwives and

nurses (51%) work full-time. Meanwhile, Auslan interpreters share similar rates of full-time work to language service practitioners with over a quarter (27%) employed on a full-time basis.

Chart 3.1: Share of language practitioners and general labour force working part-time by age (gender adjusted), 2021

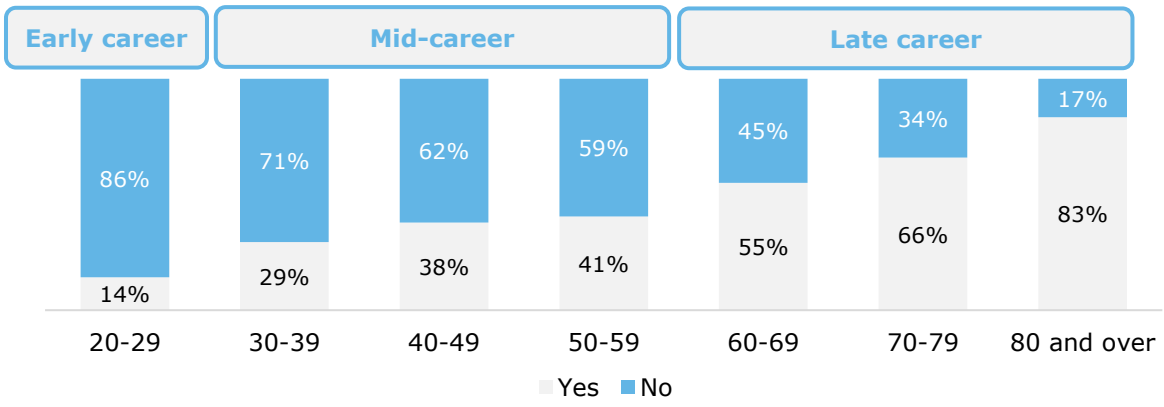


Source: Australian Census (2021).

Note: The share working part-time has been weighted by gender to account for the high share of interpreters and translators who are female. The age profile of late career professionals have been adjusted to reflect the relatively high share of older professionals working as interpreters and translators relative to the general labour force. Percentage point difference is calculated based on the average of interpreters and translators relative to the labour force.

While some workers likely value this flexibility, many interpreters and translators (notably those in their early and mid-careers) report being dissatisfied with the number of hours worked each week (Chart 3.2).

Chart 3.2: Survey responses to 'Are you satisfied with the amount of work you are engaged for on a daily basis?', 2023



Source: Department of Home Affairs Language Sector Sustainability Survey (2023)

Similarly, an RMIT survey of recent language graduates revealed more than two thirds (70%) of respondents were underemployed, engaged to work as an interpreter or translator 12.5 hours each week on average.[46] This has resulted in 40% respondents holding other employment in addition to their role as language practitioners, working an additional 20 hours each week in these other roles.[47]

[46] RMIT, 'Assessing career pathways and the viability of the Translator and Interpreter professions', Translators & Interpreters Australia, (2023), < https://ausit.org/blog/assessing-career-pathways-and-the-viability-of-the-ti-profession/>

[47] Ibid.

These findings on the lack of employment opportunities that suit workers have been echoed through consultations with LSPs and peak bodies:

> *"The interpreters that do interpreting as a living, which is typically **younger people, want to work 9 to 5**. Although not all interpreters like working 9 to 5." – LSP*

> *"These conditions suit a small number of people, mostly those who are **semi-retired** and use it to **complement their income.**" – Peak body*

3.3 Average hourly wage

Given potential limitations in the available wages data, two approaches have been used to develop a *probable range* for hourly wages for interpreters and translators:

- Top-down approach, using Census data.
- Bottom-up 'effective' hourly wage approach, based on LSP hourly rates and assumptions on the assignments that can practically be completed by language practitioners and survey data.

3.3.1 Top-down estimates using Census data

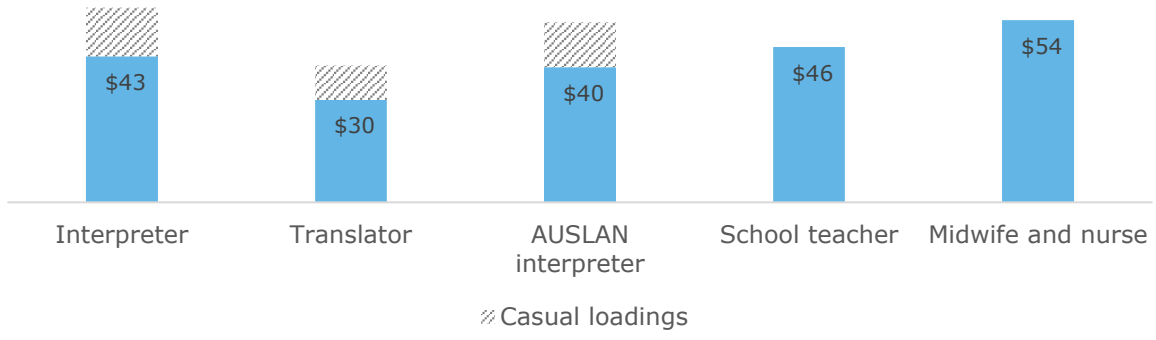
Using Census data on total weekly earnings and total hours worked, it is possible to estimate average hourly wages for individuals that report their primary occupation as interpreters and translators. However, this will capture their earnings and hours worked *across all jobs*, with the consultations suggesting that some language practitioners work multiple jobs.

Based on this approach, average hourly wages for interpreters are relatively similar to other comparable occupations on the surface, while average hourly wages for translators are slightly lower (Chart 3.3). On balance, language service practitioners receive $52 each hour.

However, as language practitioners are predominantly employed under casual arrangements, they typically receive an additional loading, which recognises that they do not have access to most paid leave entitlements.[48]

Consequently, when excluding the loadings to support a fairer comparison of wages for language practitioners with other occupations (which predominantly comprise of permanent positions), average hourly wage for interpreters and translators is lower compared to other occupations.

Chart 3.3: Average hourly wage for select occupations (excluding casual loadings), 2021



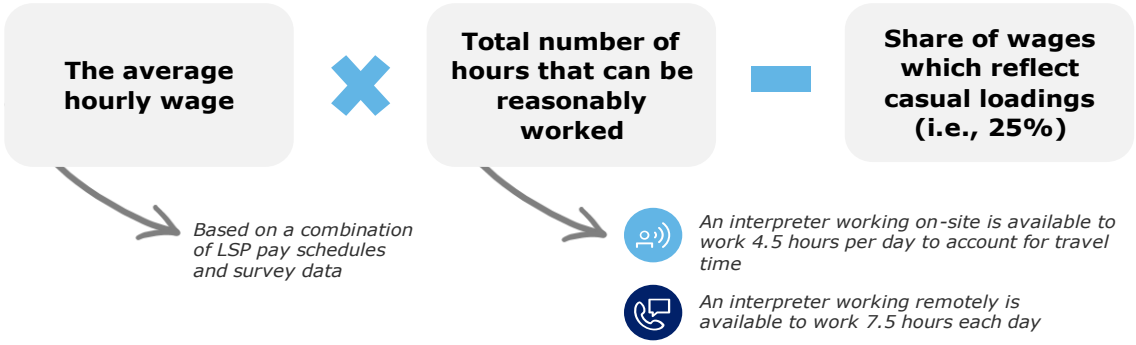
Source: Australian Census (2021). Casual loadings for language practitioners are excluded to support fairer comparisons with occupations that predominantly comprise of permanent positions.

[48] According to the Fair Work Ombudsman, the average casual loading is 25%.

3.3.2 Bottom-up estimates using LSP data and survey data

To supplement the top-down Census average wage analysis, bottom-up estimates of average hourly wages using LSP data have been calculated based on the methodology outlined in Figure 3.2.

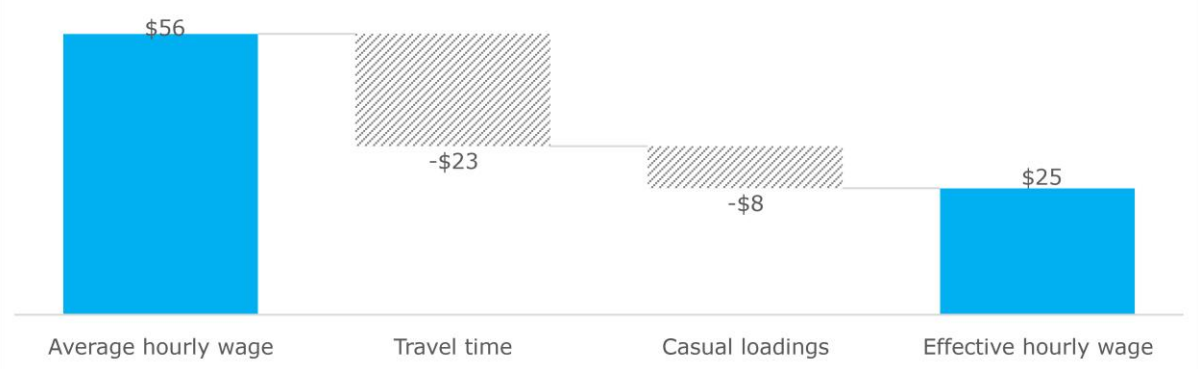
Figure 3.2: Bottom-up estimation of effective hourly wage methodology for LSP data



Source: Deloitte Access Economics (2025)

The effective hourly wage for an interpreter accepting in-person assignments is presented in Chart 3.4. While interpreters are paid $56 for each hour of interpreting, they are required to travel from assignment to assignment and are not paid for their travel time.[49] When considering their travel time and casual loadings, their effective hourly wage is significantly lower at $25 for each hour of assignment.[50]

Chart 3.4: Bottom-up estimation of in-person interpreter average hourly wage for LSP data, 2023



Source: Deloitte Access Economics (2025)

While travel time is assumed not to be applicable for interpreters providing interpreting via telephone or videoconferencing, they are subject to the casual loading. Note that this could potentially overstate their effective hourly wages as it does not consider any potential wait time / down time between assignments.

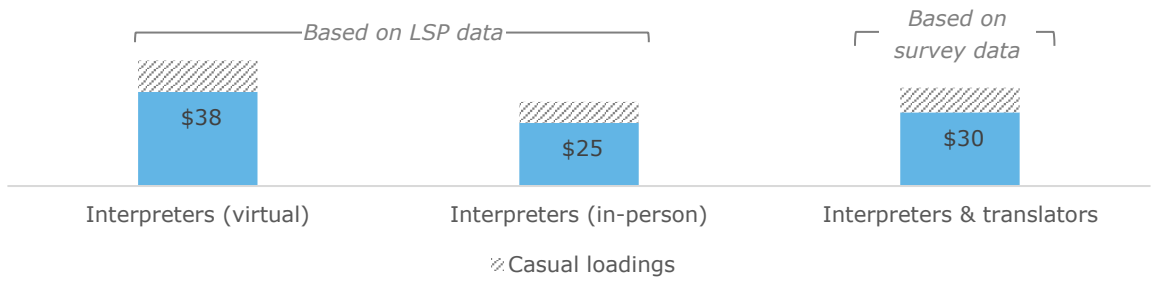
To complement the bottom-up estimation using LSP data, an average hourly wage estimate informed by a 2022 survey of 243 recent translating and interpreting graduates is provided based on earnings and hours worked as a language practitioner.[51]

[49] Based on stakeholder consultations, an interpreter working on-site is available to work 4.5 hours per day after accounting for travel time between assignments.
[50] Interpreters working on-site are typically paid on a 90-minute basis (reflecting the minimum engagement periods), which has been converted to an hourly basis in this analysis.
[51] RMIT, 'Assessing career pathways and the viability of the Translator and Interpreter professions', Translators & Interpreters Australia, (2023), <https://ausit.org/blog/assessing-career-pathways-and-the-viability-of-the-ti-profession/

The bottom-up analysis produces three estimates of average hourly wages for virtual and in-person interpreters in addition to an average hourly wage for both interpreters and translators (Chart 3.5). The average hourly wage estimation based on survey data lies within the range based on LSP data.

On balance, language practitioners receive an average hourly wage of $35 per hour. When adjusting for unpaid travel time and lack of paid leave entitlements, the available evidence suggests interpreters and translators earn lower 'effective' hourly wages to other comparable occupations.

Chart 3.5: Bottom-up average hourly wage for interpreters and translators, 2022 and 2023

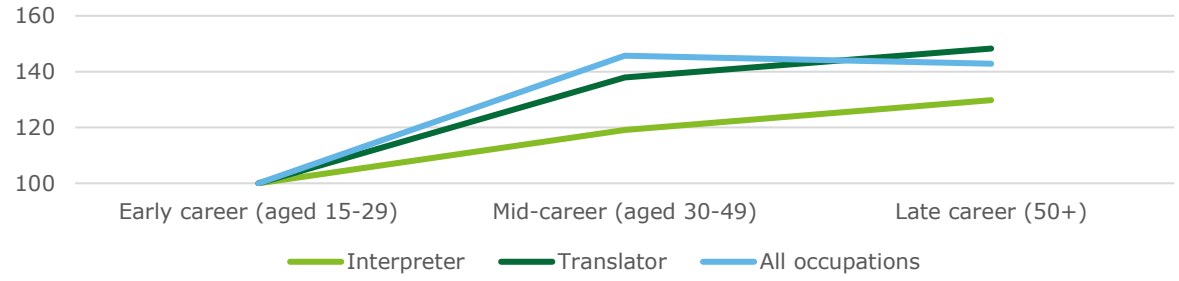


Source: RMIT Survey (2022) and LSP data (2023).

3.3.3 Differences in pay by experience and skill

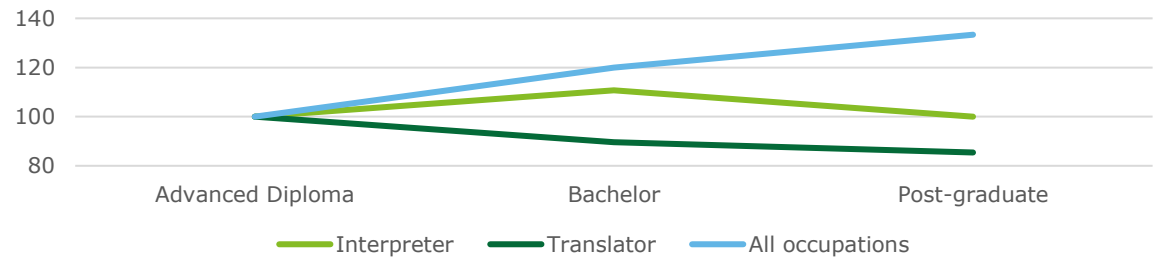
Furthermore, relative to other occupations there exists limited recognition of experience and qualification level embedded into interpreters and translators pay structure (Chart 3.6, Chart 3.7). For example, language services professionals with bachelor level qualification earn similar or lower average hourly wages to those holding an advanced diploma (a lower-level qualification). However, across the labour force, workers with a bachelor level qualification earn a 20% premium over workers with an advanced diploma.

Chart 3.6: Average hourly rate by age group (early career hourly rate = 100), 2021



Source: Australian Census (2021)

Chart 3.7: Average hourly rate by qualification level (advanced diploma hourly rate = 100), 2021



Source: Australian Census (2021)

These findings are consistent with insights from consultations, and the limited LSP data collected as a part of the 2023 report:

> *"Often there is **no pay delineation by qualification level.**" – Peak body*

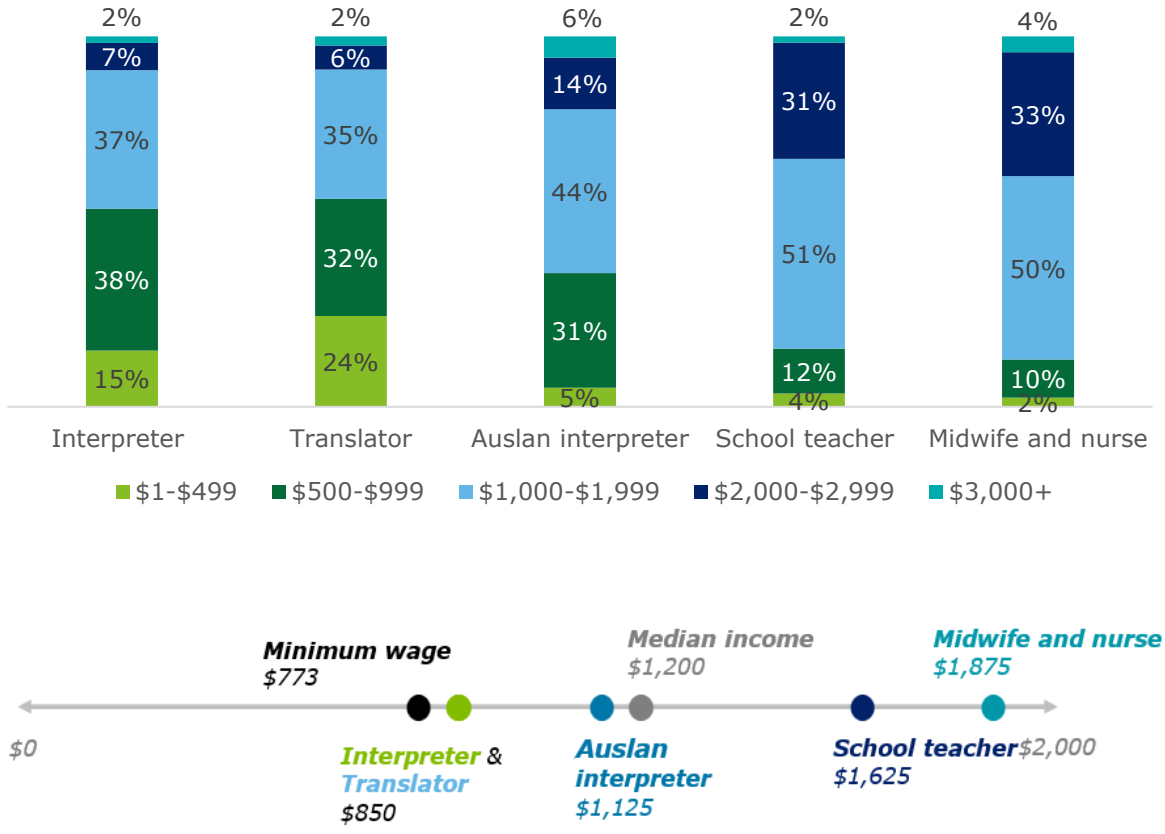
> *Only one of four respondent LSPs had different pay rates by certification level.*

The limited recognition of experience and qualification level embedded into pay structure minimises incentives to receive NAATI certification and re-certification due a lack of return on investment. Consistent with these findings, NAATI certification and re-certification rates have fallen substantially 2018 (see Section 4.4.2 for further detail).

3.4 Weekly earnings for language practitioners

When considering income from all sources, the typical interpreters and translators earned a median income of $850 in 2021.[52] This is only 10% above the minimum wage ($773), and significantly lower than those of other comparable occupations (Chart 3.8).

Chart 3.8: Weekly earnings comparison across interpreters and translators and other comparable occupations, 2021



Source: Australian Census (2021)

When only considering the income earned from the provision of language services, most language practitioners do not make the minimum wage.

[52] The average weekly earnings have not been adjusted to remove casual loadings.

- Over 70% of 3,628 surveyed interpreters and translators report earning less than the minimum wage (estimated to be $40,200 in 2021) from their provision of language services.[53] With nearly half (49%) of surveyed respondents reporting earning less than half of the minimum wage (i.e., less than $20,000) from their provision of language services.[54]
- Over 74% of 243 surveyed recent graduate interpreters and translators report earning less than the minimum wage from their provision of language services.[55] With more than half (55%) of surveyed graduates earning less than half of the minimum wage from their provision of language services.[56]

This result is driven predominantly a combination of two factors examined in Sections 3.2 and 3.3 respectively

- Low number of hours worked as interpreters and translators each week,
- Low effective hourly wages, when considering the nature of employment.

These findings were echoed in consultations with LSPs and peak bodies:

> *"The current system pays about $60 an hour, which is **not unreasonable if they were working 6-8 hours** a day but they're not, **they're working 4.5 hours a day**" – LSP*

> *"The **pay rates are so low** that even for people who want to work full-time hours, cannot work full-time because they can't make enough money from just interpreting to make ends meet." – Peak body*

3.5 Changes in earnings over time

The Australian economy has experienced a relatively high level of inflation over recent years, largely be attributed to disruptions in global supply chains paired with a strong economic recovery following the pandemic.[57] Between 2018-29 and 2022-23, prices of goods and services across the Australian economy grew on average of 3.6% each year (1.6% above the pre-pandemic 10-year annual average).[58]

The growth in language practitioners' wages has not maintained pace with broader growth in prices, recording an average annual growth rate of 2.4% over the same period, indicating workers have experienced a loss in overall purchasing power. Furthermore, the growth in language practitioners' wages is below the 'all occupation' average annual growth rate (3.0%) and other comparable occupations such as nurses and midwives (3.2%) and school teachers (2.7%).[59,60,61] Moreover, comparable occupations have recently received considerable pay rises to address critical

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[53] Jim Hlavac, Shani Tobias, Lola Sundin, Simon Knowles, Alex Avella Archila, *Translators' and interpreters' engagement with professional development in Australia: An analysis of key factors* (2024), Vol (16), *Translating & Interpreting*, 142
[54] Ibid.
[55] RMIT, 'Assessing career pathways and the viability of the Translator and Interpreter professions', Translators & Interpreters Australia, (2023), <https://ausit.org/blog/assessing-career-pathways-and-the-viability-of-the-ti-profession/
[56] Ibid.
[57] Reserve Bank of Australia, 'Box C: Supply and Demand Drivers of Inflation in Australia', (2023), <https://www.rba.gov.au/publications/smp/2023/feb/box-c-supply-and-demand-drivers-of-inflation-in-australia.html#:~:text=High%20inflation%20outcomes%20in%20Australia,supply%20disruptions%20from%20poor%20weather.>
[58] Australian Bureau of Statistics, *Consumer Price Index Australia, September Quarter 2024* (6401.0, 30 October 2024)
[59] Australian Bureau of Statistics, *Average Weekly Earnings, Australia, May 2024* (6302.0, 15 August 2024)
[60] Australian Nursing and Midwifery Federation, 'Nurses and Midwives (Victorian Public Health Sector) (Single Interest Employers) Enterprise Agreement 2016-2020', (2016), < https://www.anmfvic.asn.au/~/media/files/ANMF/EBA%202016/Nurses-and-Midwives-Vic-PS-SIE-EA-2016-2020-amended>
[61] Victorian Government, 'Victorian Government Schools Agreement 2017', (2017), <https://www.education.vic.gov.au/hrweb/documents/vgsa-2017.pdf>

workforce shortages. For instance, Victorian nurses and midwives have received a 28% pay rise over four years to help retain and recruit more workers into the sector.[62]

These findings were echoed in consultations, with peak bodies and LSPs consistently highlighted stagnant wages (even failing to keep up with inflation) as a significant issue:

*"In Victoria, **wages have not moved since 2018** and if you consider the current cost of living crisis and inflation interpreters are actually **getting paid less now than in 2018.**" – Peak body*

*"In current procurement environment, the only factor considered is price which has created this **race to the bottom within the sector** and the only way we can actually get on the government supplier panels is to drop the amount we pay interpreters." – LSP*

*"The **growth in wages has not maintained pace with inflation**, in the 25-30 years ago we got paid $50 per 90 minute booking and now we get paid $75-80 per 90 minute booking." – Peak body*

3.6 Other working conditions

Consultations with the sector highlighted a lack of minimum working conditions beyond wages and hours worked such as access to superannuation, lack of professional development and preparation time. Figure 3.3 summarises the working conditions issues raised in consultation within the sector.

Figure 3.3: Working condition findings

Working condition	Current state
Superannuation & tax withholding	A survey found while all government LSPs paid superannuation and withheld tax, 38% of private LSPs paid superannuation and withheld tax. [a]
Preparation time & breaks	*"**No briefing prior to the booking as the fee never includes preparation time** so you don't know what you're walking into and some of the situations are very technical and may require some preparation." – Peak body*
Professional development	*"Currently **very few employers offer any professional development training to interpreters and translators** " – Peak body*
Occupational Health & Safety	*"Interpreters are always **interpreting someone's problem** and can be exposed without warning to very disturbing situations as you often don't know who is on the other end of the phone, there are **limited protections or supports in place to help us deal with this**. And even if there are, **they are not made widely known about** . " – Peak body*

Source: Deloitte Access Economics (2025)

Notes: (a) AUSIT survey

[62] 'Victorian nurses and midwives to get 'once-in-a-generation' 28% pay rise', *beat* (online, 26 June 2024) <https://beat.com.au/victorian-nurses-and-midwives-to-get-once-in-a-generation-28-pay-rise/>

4 Recent trends in worker supply

This chapter outlines recent trends in the stock and flow of interpreters and translators, and differences across the three age personas.

4.1 Role of wages and conditions in driving workforce trends

There is strong evidence in the literature that wages affect both an individual's likelihood of employment, as well as their hours worked. For instance, Kalb (2010) estimates the uncompensated wage elasticities of labour supply by qualification and family characteristics.[63] Their research finds that:

- Parents (particularly sole parents and married female with children) are relatively more responsive to changes in the wage rate. In contrast, married male with children and single male relatively less responsive.
- Individuals with Year 12 or below qualifications are relatively more responsive to changes in the wage rate. In contrast, individuals with Degree or above qualifications are relatively less responsive.

When applying these wage elasticities by qualification and family characteristics to the composition of interpreters and translators (based on the 2021 Census), the average uncompensated wage elasticities for language practitioners can be estimated. Table 4.1 shows that for every one percent increase in average wages for language practitioners, total hours worked are expected to increase by 0.37%.

Table 4.1: Implied average uncompensated wage elasticities (all hours), applied to language practitioners

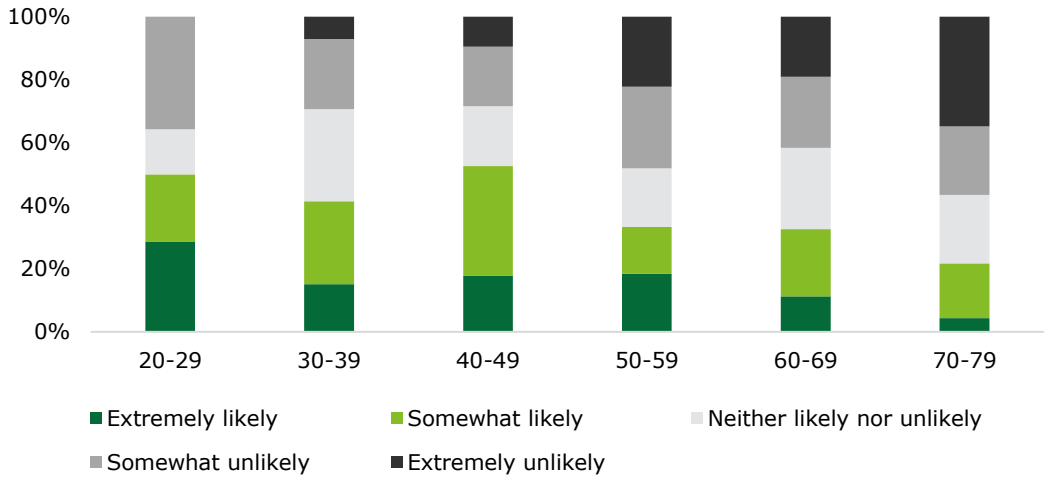
	Average wage elasticity
Interpreters	0.40
Translators	0.30
Language practitioners*	0.37

Source: Deloitte Access Economics (2025), Kalb (2010). *The value for language practitioners is calculated based on the weighted average of interpreters and translators.

The *Department of Home Affairs Language Sector Sustainability Survey* also suggests that wages and conditions are a key driver of language practitioners' stated intentions for remaining in the sector. The survey finds that early career (20-29) and mid-career interpreters and translators (30-49) are more likely to report being 'extremely likely' or 'somewhat likely' to consider leaving the sector (4.1).

[63] Kalb, Guyonne. (2010). Modelling Labour Supply Responses in Australia and New Zealand. Tax Reform in Open Economies: International and Country Perspectives.

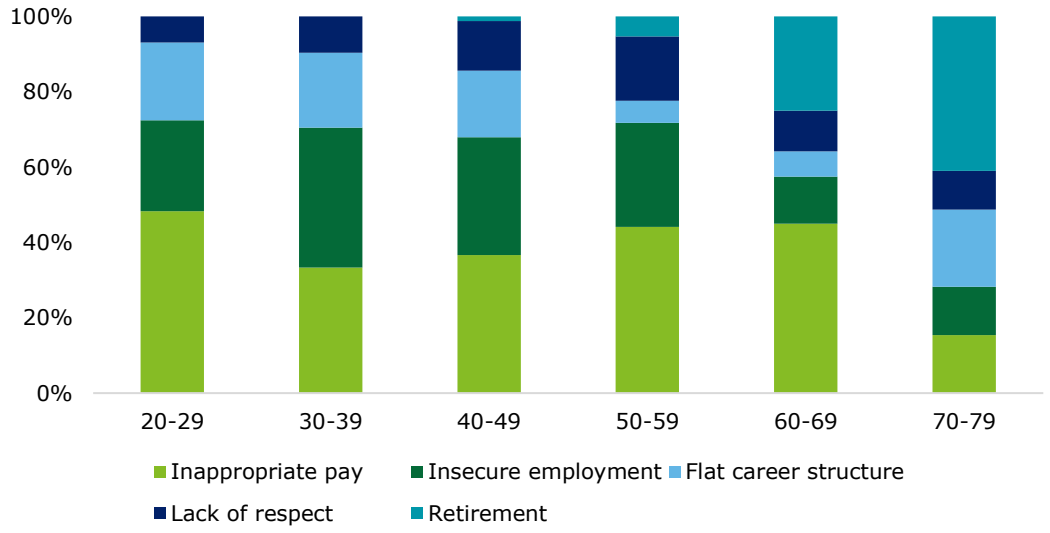
Chart 4.1: Likelihood of survey respondents considering leaving the interpreting sector



Source: Department of Home Affairs Language Sector Sustainability Survey (2023).

Among practitioners considering leaving the sector, the key drivers of this decision are associated with poor remuneration, insecure employment, and a lack of opportunities for career advancement (Chart 4.2).

Chart 4.2: Key reasons for practitioners considering leaving the interpreter sector



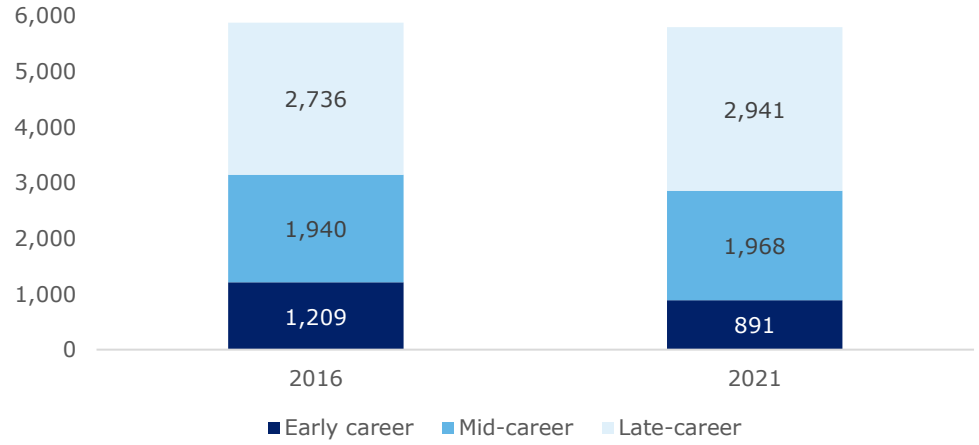
Source: Department of Home Affairs Language Sector Sustainability Survey (2023).

4.2 Change in worker supply from 2016 to 2021

Lower pay – and growth in pay – for language practitioners relative to comparable occupations have been reflected in recent trends in the workforce supply. From 2016 to 2021, the interpreter and translator workforce decreased from approximately 5,900 persons to 5,800 persons, despite a 6% increase in the number of persons with low English proficiency over the same period (Chart 4.3).

The decrease in the workforce is driven by a combination of: (i) reduced inflows from new entrants and other occupations over time, and (ii) stable outflows (through retirement or changing occupations), that are higher than inflows.

Chart 4.3: Language practitioner workforce by age persona, 2016 versus 2021 (headcount)



Source: Australian Bureau of Statistics Census (2021).

4.2.1 Trends in early career worker supply (15-29 years)

The decline in the language practitioner workforce supply has been driven predominantly by early career workers, with 26% fewer early career workers in 2021 compared to 2016 (Chart 4.4).

Among the three age-based personas, early career workers contribute the most to worker inflows, mainly through new workers entering the sector following their initial qualification and training ('new entrants').

However, these inflows are more offset by high rates of outflows, with early career workers moving either into other occupations ('outflow to other occs'), or out of the labour force ('outflow to NILF').

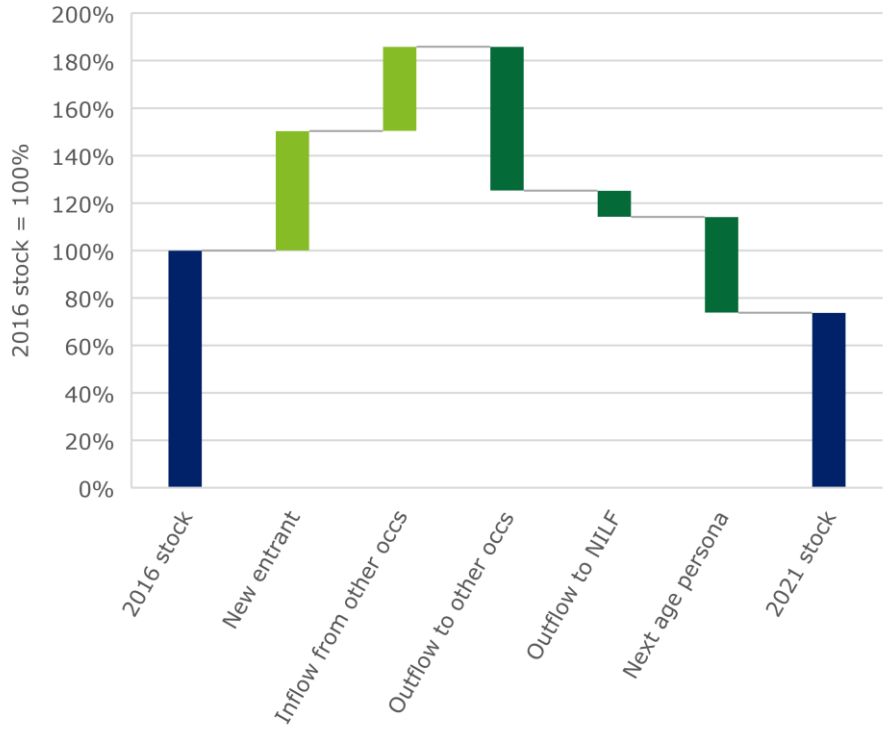
Other research also suggest a high rate of turnover for early career workers. For instance, RMIT (2023) finds that one in ten (10%) recent interpreting and translating graduates plan to leave the language services industry to seek employment elsewhere, with lack of income and stability cited as the top reasons behind this decision.[64]

Lastly, approximately half of all remaining early careers workers will progress into mid-career professionals over a five year period ('next age persona').[65]

[64] RMIT, 'Assessing career pathways and the viability of the Translator and Interpreter professions', Translators & Interpreters Australia, (2023), <https://ausit.org/blog/assessing-career-pathways-and-the-viability-of-the-ti-profession/

[65] Early career language practitioners aged 25-29 will become 30-34 year olds within the next five years, which is classified as mid career professionals.

Chart 4.4: Inflows and outflows for early career language practitioners, 2016 to 2021



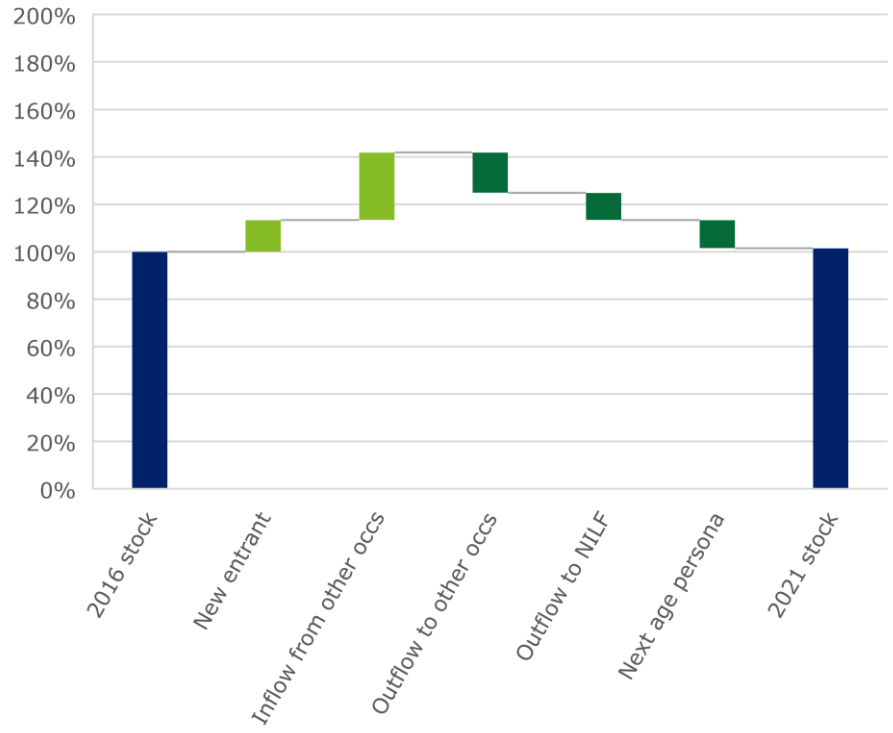
Source: Australian Bureau of Statistics Census (2021)

4.2.2 Trends in mid-career worker supply (30-49 years)

The supply of mid-career language professionals has remained broadly stable from 2016 to 2021 (Chart 4.5).

Worker inflows over the five year period represented 41% of the 2016 worker supply, with relatively more people transitioning from other occupations compared to new entrants from initial training completions. These inflows have been able to offset the outflows from the sector, with movements to other occupations the most common driver of exits for mid-career language practitioners.

Chart 4.5: Inflows and outflows for mid-career language practitioners, 2016 to 2021



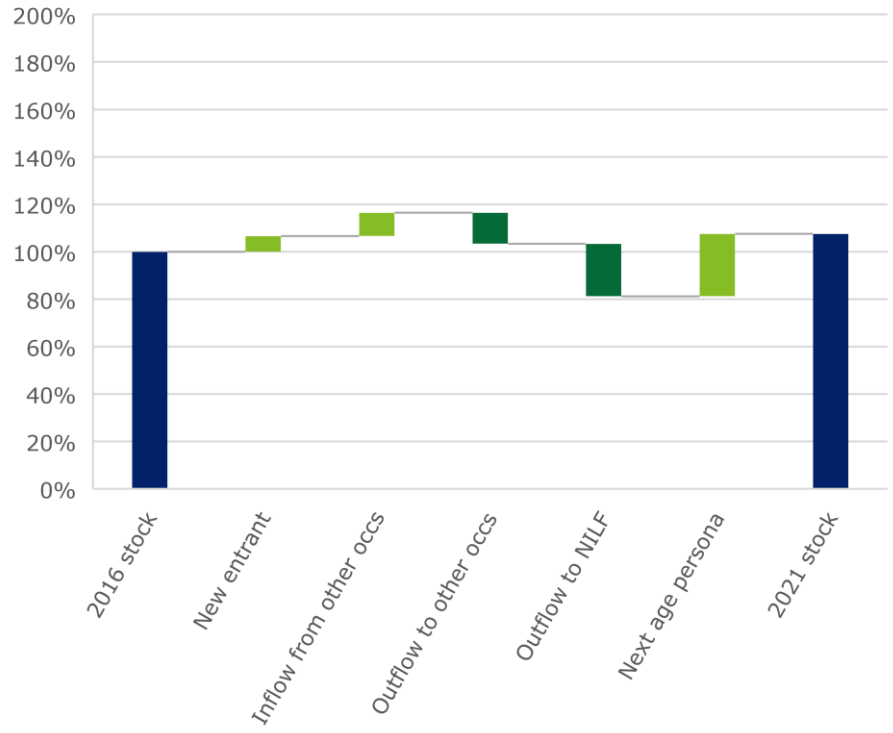
Source: Australian Bureau of Statistics Census (2021)

4.2.3 Trends in late career worker supply (50+ years)

In contrast to early and mid-career professionals, the supply of late career language practitioners has increased by 8% from 2016 to 2021 (Chart 4.6). The biggest source of inflows has been from the ageing of mid-career professionals into late career professionals (i.e., those in the 45-49 age group in 2016 ageing to the 50-54 age group in 2021). The largest source of outflows have been through retirement, and people exiting the labour force.

While the growth in late career workers have been able to offset some of the supply declines in the other age groups, this cannot last indefinitely into the future. As late career workers continue to age, they are likely to reduce their hours worked before retirement. Indeed, in 2021, 37% of late career workers are already aged 65 or older. Another 40% are aged between 55 to 64 and will reach typical retirement age over the next decade.

Chart 4.6: Inflows and outflows for late career language practitioners, 2016 to 2021



Source: Australian Bureau of Statistics Census (2021)

4.3 Trends in worker supply since 2021

The latest comprehensive data on the language practitioner workforce is only available up to 2021. However, evidence from a range of sources suggest that the decline in workforce supply has subsequently accelerated, and the sector is facing increasing workforce pressures.

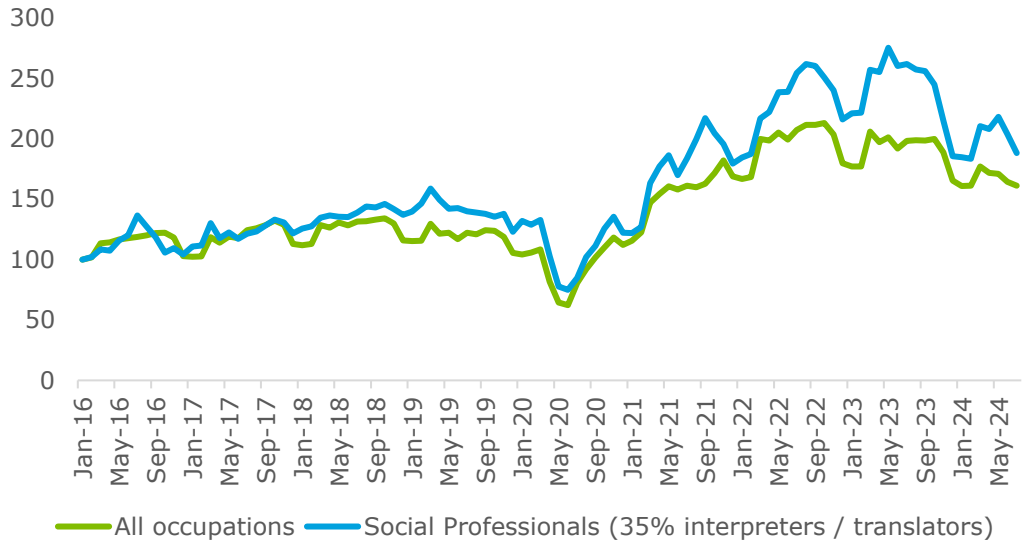
4.3.1 Trends in labour shortages

The Internet Vacancy Index (IVI) is a monthly count of online job advertisements compiled by Jobs and Skills Australia and can be typically used as a proxy for labour force shortages. A higher number of advertisements suggest either greater demand for a particular occupation, or difficulties in filling these roles.

While data is not available for ANZSCO 6-digit occupations (i.e., interpreters and translators), data is available for social professionals, which is the ANZSCO 4-digit occupation that interpreters and translators sit within.

Notably, worker shortages for social professionals have grown at a faster rate since 2021 compared to the broader workforce. In 2024, the IVI is 49% higher compared to the average from 2016 to 2021 for social professionals, compared to being 37% higher for all occupations over the same period (Chart 4.7).

Chart 4.7: Labour shortage as measured by the Internet Vacancy Index (100 = 2016 levels)



Source: Internet Vacancy Index (2024).

4.3.2 Trends in training commencements

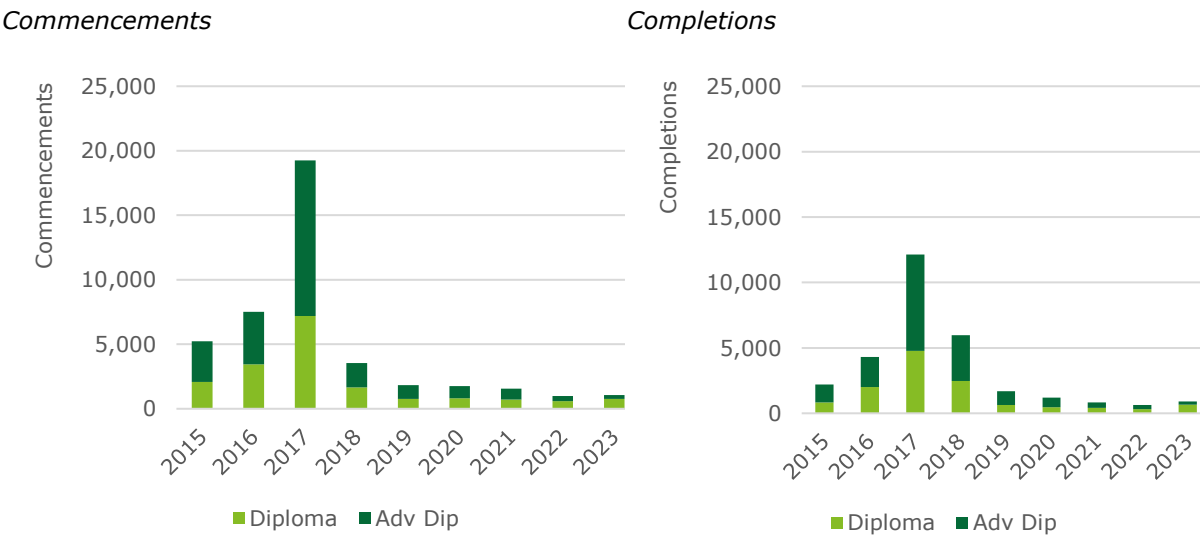
VET qualification is a prerequisite for NAATI certification, and training commencements and completions can be considered leading indicators for worker inflows.

Since 2021, commencements and completions for both the Diplomas and Advanced Diplomas in Interpreting and Translating have been decreasing (Chart 4.8).

- Over 2022 to 2023, there were an average of 770 completions per annum, which is 38% lower compared to the three year average from 2019 to 2021.
- Similarly, from 2022 to 2023, there were an average of 1,040 commencements per annum, which is 40% lower compared to average over the three prior years.

Note that there is no publicly available data on training volumes for Higher Education qualifications for interpreters and translators.

Chart 4.8: VET training commencements and completions, 2015 to 2023



Source: NCVER (2024). Includes: (1) Diploma of Interpreting, (2) Advanced Diploma of Interpreting, (3) Diploma of Translating, and (4) Advanced Diploma of Translating.

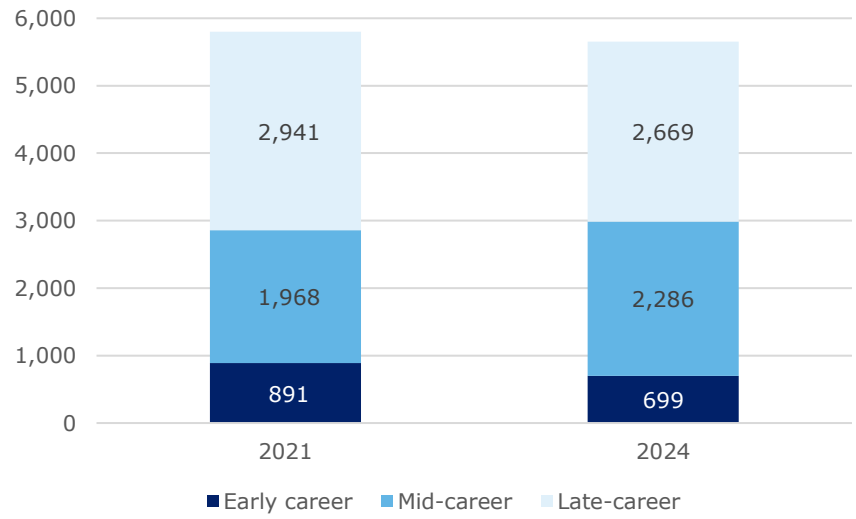
4.3.3 Estimated workforce supply from 2021 to 2024

Based on the observed trends outlined in the above sections, Deloitte Access Economics estimates the likely workforce supply trajectory from 2021 to 2024, by adjusting the following parameters:

- Trends in training commencements are used to reduce annual inflows from training completions ('new entrants')
- Trends in the IVI are used to adjust the net inflows from other occupations
- Trends in the ageing profile are used to adjust the retirement assumptions.

Deloitte Access Economics estimates that there were approximately 5,650 language practitioners employed in 2024 (Chart 4.9), which is 150 fewer workers compared to 2021. The decline continues to be driven by early career workers, due to lower commencement rates accompanied by higher rates of exit to other occupations.

Chart 4.9: Estimated language practitioner workforce by age persona, 2021 versus 2024 (headcount)



Source: Deloitte Access Economics (2025).

4.4 Trends in NAATI certification

Given limited data on the quality of language practitioners, practitioners with NAATI certification is used as a proxy for a high quality workforce. Access to a high quality workforce is important given evidence that the use of interpreters without certification is associated with higher likelihood of sub-optimal interpreting. For instance, research finds a 19% increase in error rates compared to interpreters with Specialist Interpreter certifications and Certified Interpreter credentials.[6667]

4.4.1 Certification rates in 2022

There is uncertainty over the proportion of the workforce with NAATI certification. While the latest NAATI data suggests that 10,400 practitioners held some form of certification in 2023, this is greater than the number of language practitioners and may include individuals who are not actively working in the sector, and individuals who hold certification for multiple languages.[68,69]

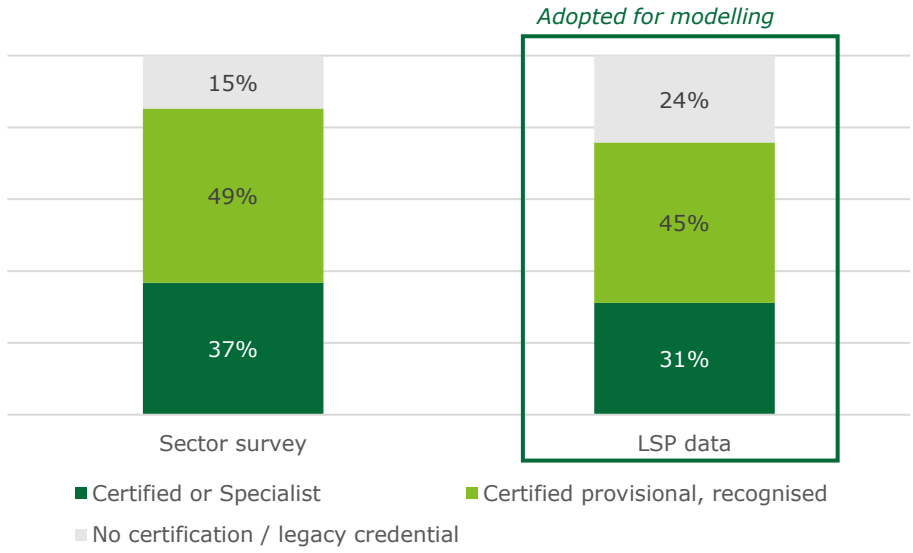
[66] Anttila, A., Rappaport, D. I., Tijerino, J., Zaman, N., & Sharif, I. (2017). Interpretation Modalities Used on Family-Centered Rounds: Perspectives of Spanish-Speaking Families. Hospital Pediatrics, 7(8), 492–498.
[67] Flores G, Abreu M, Barone CP, Bachur R, Lin H. Errors of medical interpretation and their potential clinical consequences: a comparison of professional versus ad hoc versus no interpreters. Ann Emerg Med. 2012 Nov;60(5):545-53.
[68] '2022-23 Annual Report', NAATI, (June 2023), <https://www.naati.com.au/wp-content/uploads/2023/10/NAATI_Annual-Report_2022-23.pdf>
[69] NAATI certification includes certified conference interpreter, specialist legal or health interpreter, certified interpreter, certified provisional interpreter, recognised practicing interpreter, certified advanced translator, certified translator or recognised practicing translator.

The Department of Home Affairs Language Sector Sustainability Survey found that among the respondent interpreters, interpreters were NAATI certified for 37% of languages that they provided interpreting for, and certified provisional or recognised for 49% of languages.

This is slightly higher than the rates of certification seen across completed assignments in 2022 for select LSPs.[70] The LSP data suggests that only 31% of assignments were completed by NAATI certified interpreters, and 54% were completed by NAATI certified provisional or recognised interpreters. This difference potentially reflects self-selection bias for the sector survey respondents, or differences in the number of assignments completed by language practitioners based on their certification level.

The modelling consequently adopts the LSP data as the starting point for determining the number of interpreters and translators with different levels of NAATI certification (Chart 4.10).

Chart 4.10: Proportion of language practitioners with NAATI certification, 2022



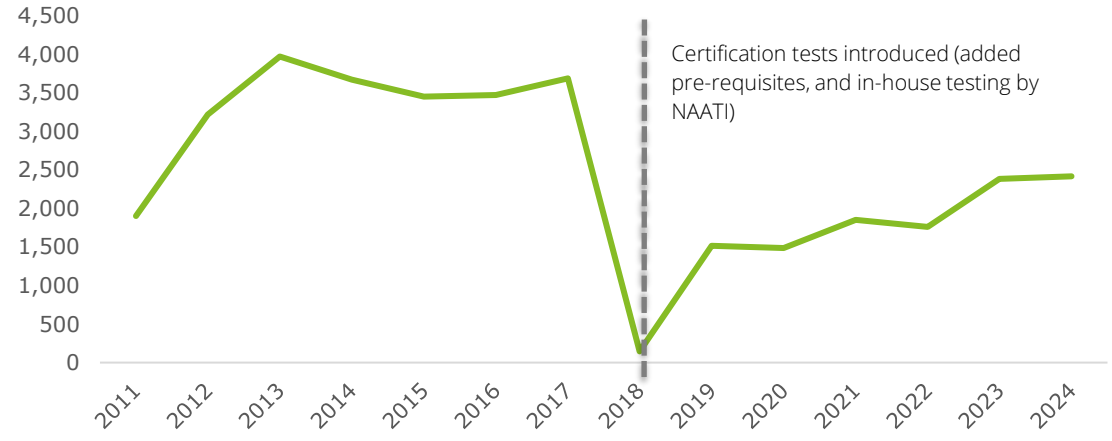
Source: Deloitte Access Economics (2025).

4.4.2 Trends in certification and re-certification

Demand for new NAATI certifications has been increasing from 2021 to 2024 (Chart 4.11). Note that this remains significantly lower than historic rates of certification before 2018. Before 2018, pre-requisites and in-house testing for certification were not required.

[70] Based on data collected from seven LSPs and two Government Departments on the use of interpreters from the 2023 report.

Chart 4.11: Demand for NAATI certification tests, 2011 to 2024

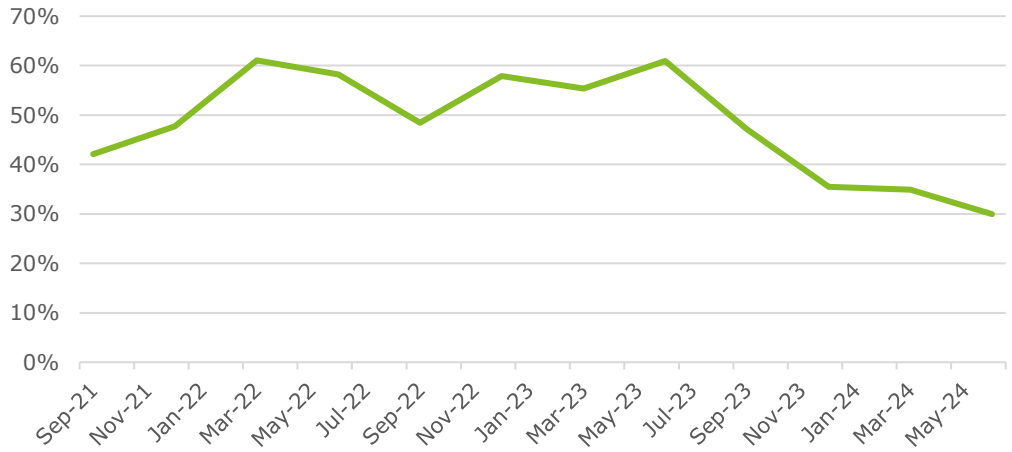


Source: National Certification Authority for Translators and Interpreters (2024).

To maintain active NAATI certification, recertification is required every three years. However, the proportion of eligible practitioners recertifying has been decreasing over time (Chart 4.12). Over 2021 and 2022, only 53% of language practitioners eligible for re-certification subsequently recertified. This decreased to 44% over 2023 to 2024, representing a 16% decrease.

This could potentially reflect a lack of incentive for certification. Consultations report that LSPs often prioritise filling bookings over ensuring the best fit, with limited mechanisms in place to ensure the most qualified language practitioners are booked on assignments. Further, more than half (55.3%) of surveyed interpreters report that their credentials were rarely check or never checked.[71]

Chart 4.12: Proportion of practitioners recertifying out of all eligible practitioners, 2021 to 2024



Source: National Certification Authority for Translators and Interpreters (2024).

Reduced rates of certification may have implications for the quality of language service provided by active interpreters and translators. Approximately 45% of respondents to the Department of Home Affairs Language Sector Sustainability Survey are aware of instances of poor-quality interpreting, with over half reporting it to occur often or very often.

[71] AUSIT & ASLIAQ, 'Report into engagement and job satisfaction of Queensland spoken and sign language interpreters, (2022), < https://www.refugeehealthnetworkqld.org.au/wp-content/uploads/2023/06/2022-Interpreter-Satisfaction-Survey.pdf>

As fewer certifications are issued and the supply of skilled interpreters decreases, the proportion of low-quality interpreters in the sector is expected to increase. The shrinking labour supply consequently reduces options for government and interpreting agencies to procure sufficiently qualified interpreters and translators, bringing down quality in the sector overall.

5 Workforce supply trajectory without positive change

Using the estimated 2024 worker supply as a starting point, this chapter outlines three potential scenarios for future workforce supply out to 2035 without positive policy changes.

5.1 Workforce supply (Scenario 1: Business-as-usual)

Under scenario 1, it is assumed that the differential in wages and conditions between the language services sector and other occupations remain fixed at current levels. Consequently, key drivers of workforce supply would be expected to remain at the observed rates seen from 2021 to 2024.

Under this scenario:

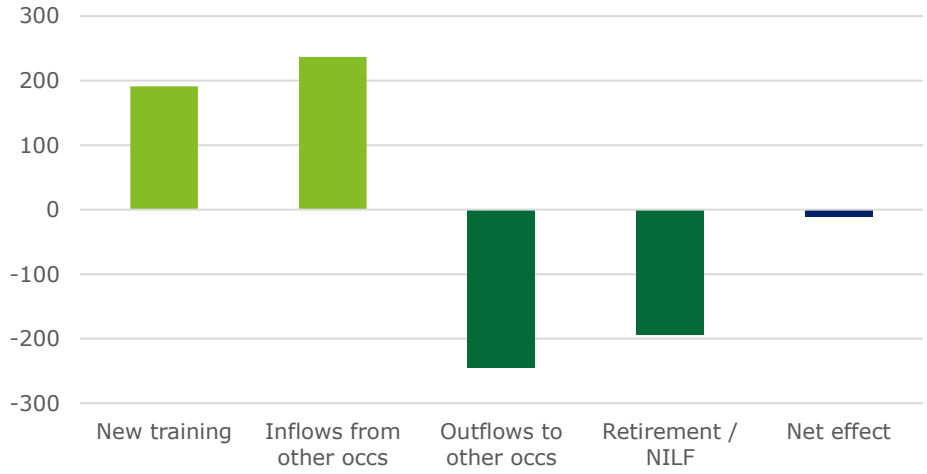
- New entrants through initial training completions ('new training' are expected grow in line with population (1% per annum), with an average 190 new entrants per annum.
- Inflows and outflows to/from other occupations are assumed to remain at historic rates, with a net loss of 10 language practitioners each year.
- Retirements are expected to increase over time as late career workers continue to age and more likely to exit the labour force. From 2025 to 2035, there are expected to be 190 retirements by language practitioners per annum.

Overall, these trends will contribute to lead to a net loss of 10 language practitioners per annum, which represents a compound annual growth rate (CAGR) of -0.2%. This is slightly higher than the CAGR of -0.5% seen from 2016 to 2024. To put the expected growth rate of the language practitioner workforce in context, three-quarters of 6-digit occupations grew at a faster rate than the expected -0.2% from 2016 to 2021.[72]

The contribution of key inflows and outflows to language practitioner supply under scenario 1 is given in Chart 5.1. This is expected to result in 5,530 language practitioners under scenario 1 by 2035.

[72] Limited to occupations with 1,000 or more workers in 2016 (407 occupations).

Chart 5.1: Contribution to average annual change in worker supply (Scenario 1), 2024 to 2035

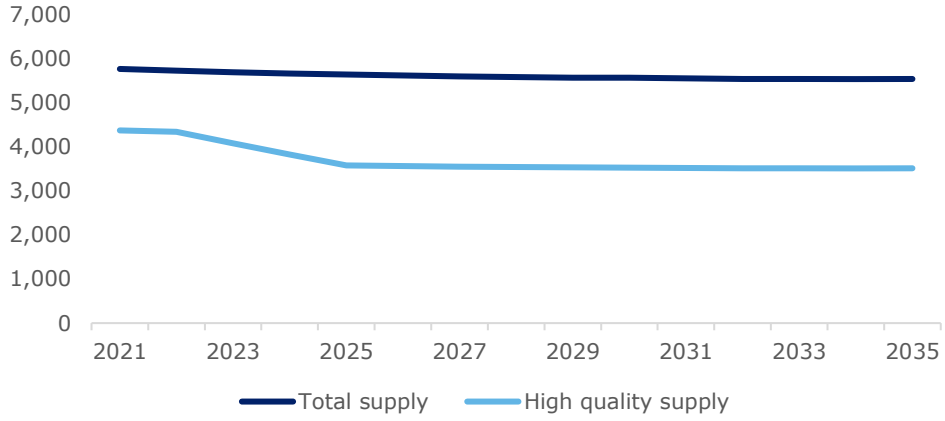


Source: Deloitte Access Economics (2025).

Over the same period, there is expected to be a 16% decrease in the proportion of language practitioners with NAATI certification (in line with the decrease in recertification seen from 2021-22 to 2023-24). By 2035, only 3,510 workers will hold NAATI certification, representing 63% of the total workforce.

The timeseries of the projected interpreter and translator supply under scenario 1 is given in Chart 5.2.

Chart 5.2: Projected workforce supply (Scenario 1), 2024 to 2035



Source: Deloitte Access Economics (2025).

5.2 Workforce supply (Scenario 2: Gradual decline)

Under scenario 2, the differential in pay and working conditions between language practitioners and other sectors continue to grow over time.

Based on recent trends, average wages for language practitioners grew by 2.4% per annum, which is 0.6 percentage points lower than the 3.0% observed in the economy more broadly (see Section 3.5). Assuming an additional 0.6 percentage point gap in wages per annum, this is expected to lead to a 6% additional differential in pay between interpreters and other occupations by 2035 (relative to 2024 terms).

This is expected to lead to faster rates of outflows, slower rates of inflows, and reduce hours worked by the existing workforce compared to the trends observed in 2024 (building from Section 4.3.3).

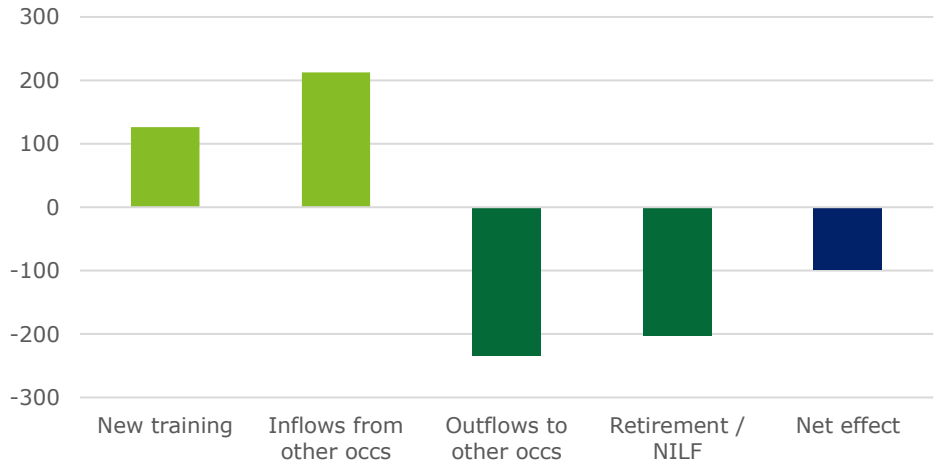
Based on the labour supply elasticities outlined in Table 4.1, this is associated with a 2.4% decline in the workforce (relative to an alternative where the gap did not open up).

Consequently, worker supply inflows from new training are expected to drop to 130 persons per annum, while inflows from other occupations decrease to 210 workers per annum.

In contrast, outflows are expected to increase, with 230 workers leaving the sector per annum to move to another occupation, with another 200 workers retiring. The increasing outflow of practitioners is likely to be driven more by mid-career professionals who tend to be more sensitive to changes in the wage rate.

Overall, this is expected to lead to a net contraction of 100 workers per annum, which represents a CAGR of -1.9% over the decade to 2035. To put the expected growth rate of the language practitioner workforce in context, 85% of 6-digit occupations grew at a faster rate than -1.9% from 2016 to 2021.

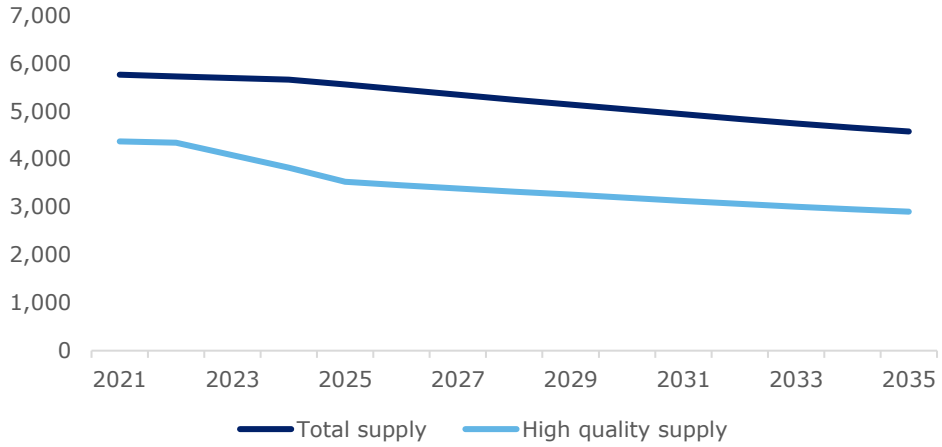
Chart 5.3: Contribution to average annual change in worker supply (Scenario 2), 2024 to 2035



Source: Deloitte Access Economics (2025).

Under scenario 2, there are expected to be 4,570 language practitioners by 2035, with 2,900 individuals (63% of the total workforce) expected to hold NAATI certification. The timeseries of projected interpreter and translator supply under scenario 2 is given in Chart 5.2.

Chart 5.4: Projected workforce supply (Scenario 2), 2024 to 2035



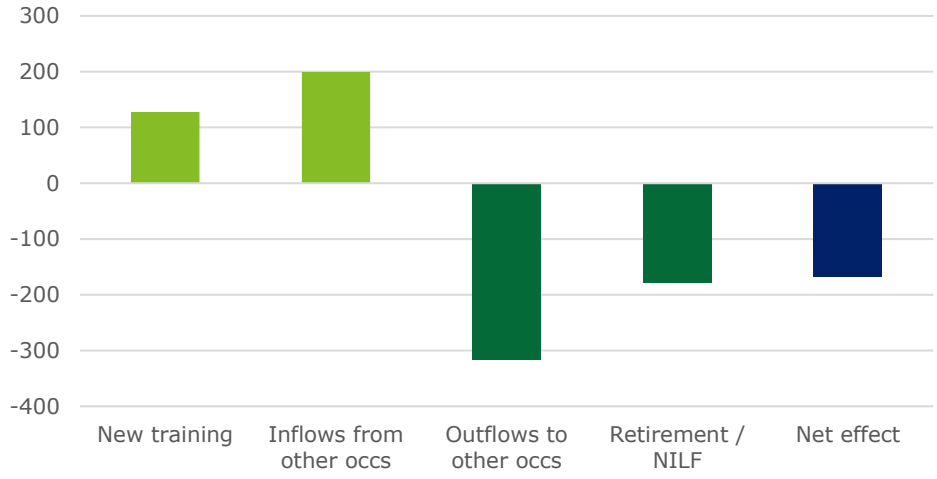
Source: Deloitte Access Economics (2025).

5.3 Workforce supply (Scenario 3: Accelerated decline)

Under scenario 3, concerns over pay and conditions are expected to deepen, and the reputation of the language services sector is assumed to be further damaged. Benchmarking against the experience of the Government teacher workforce sector in Victoria, [73] an increase in the attrition rate (of between 1.1 percentage points and 3.1 percentage points) has been modelled across the three age personas.[74]

Consequently, under this scenario, outflows to other occupations are expected to increase to 320 workers per annum, resulting in a net loss of 170 language practitioners per annum. The average annual inflows and outflows that contribute to workforce supply under Scenario 3 are given in Chart 5.5.

Chart 5.5: Contribution to average annual change in worker supply (Scenario 3), 2024 to 2035



Source: Deloitte Access Economics (2025).

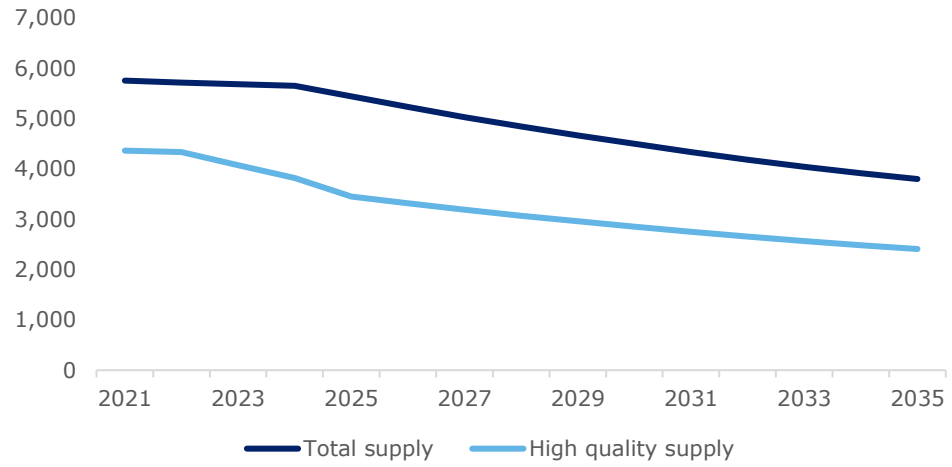
This decline represents a CAGR of -3.5% over the decade to 2035, which is a slower than the historic growth rate seen by 92% of 6-digit ANZSCO occupations from 2016 to 2021.

Consistent with the other scenarios, the proportion of NAATI-certified practitioners is expected to decrease to 63%, which would represent 2,410 workers by 2035. The timeseries of projected interpreter and translator supply under scenario 3 is given in Chart 5.6.

[73] Victorian Teacher Supply and Demand Report 2022 (2024). Available at: https://www.education.vic.gov.au/Documents/school/teachers/profdev/careers/2022-Teacher-Supply-and-Demand-Report.pdf. Based on difference in attrition from 2017 to 2022.

[74] The modelling assumes: (i) 1.1 percentage points for early career workers, (ii) 1.5 percentage points for mid-career workers, and (iii) 3.1 percentage points for late career workers. Consequently, the annual attrition rate will grow to (i) 18%, (ii) 5% and (iii) 6% respectively across the three age personas.

Chart 5.6: Projected workforce supply (Scenario 3), 2024 to 2035



Source: Deloitte Access Economics (2025).

6 Economic costs of sub-optimal interpreting without positive change

Building on the 2023 report, this chapter estimates a broader range of economic costs associated with sub-optimal interpreting, and how they are likely to change in the future.

6.1 Current costs of sub-optimal interpreting

6.1.1 Direct costs (Key findings from the 2023 report)

Drawing on select case studies with relatively stronger evidence bases, Deloitte Access Economics estimates in the 2023 report that as a lower bound, the current provision of sub-optimal interpreting costs the Australian economy and society $326 million per annum. These costs only capture the immediate negative outcomes associated with an instance of sub-optimal interpreting. For instance, this includes (i) increased throughput time, length of hospitalisation and readmissions in the health setting, and (ii) cases delays, remitted cases and appeals in the legal setting.

Further, the evidence suggests that interpreting is frequently not requested. When including latent demand, the upper bound economic and social cost across the extrapolated range of service delivery areas increases to $892 million per annum, with over half of costs relating to public hospitals and health services. Further details on the modelling approach and assumptions are provided in the 2023 report.

Table 6.1: Estimated economic and social cost of current sub-optimal interpreting ($ million), 2023

Service delivery	(1) Low-quality	(2) Unfilled	(1) +(2) Lower bound	(3) Latent	(1) + (2) + (3) Upper bound
Australian Government led case studies					
Aged Care (M)	5.5	5.4	10.8	82.7	93.5
Legal settings (M)	7.6	0.9	8.5	-	8.5
HSP (M)	7.0	5.3	12.3	28.2	40.6
Services Australia (L)	3.0	1.1	4.1	-	4.1
Aus Gov case studies	**23**	**13**	**36**	**111**	**147**
State Government led case studies					
Public hospital and health services (Qld) (H)	16.3	8.0	24.4	20.2	44.5
Extrapolation to select other service delivery areas					
Uncaptured relevant Aus Gov Agencies*	21.1	19.4	40.4	248.7	289.1

Public hospital and health services (ROA)	151.1	74.2	225.3	186.3	411.7
Extrapolated total^[1]	**212**	**114**	**326**	**566**	**892**

Source: Deloitte Access Economics (2023). H = relatively high degree of confidence in estimates; M = medium; L= low. *Relevant Australian Government Agencies refer to those responsible for delivering the case studies: Department of Health and Aged Care, Department of Home Affairs, AAT, FCFCOA and Federal Court, and Services Australia. ^Extrapolated total refers to the case studies + relevant Aus gov agencies + public hospital and health services (ROA). Note: (1) Total costs may not equal to the sum of individual cost line items due to rounding.

6.1.2 Flow-on costs of sub-optimal interpreting

In addition to the direct costs, repeated exposure to sub-optimal interpreting is expected to result in disengagement or loss of trust in Government services and systems. Using health services as an example, Deloitte Access Economics estimates the costs to individuals, Government and broader society from worse health outcomes.

There is strong evidence in the literature to suggest a 10% gap in health outcomes and health care access (e.g. preventative screenings, vaccinations) for people with low English proficiency relative to people with high English proficiency.[75,76,77] As these studies control for other factors that may be correlated with English proficiency and contribute to differences in health outcomes (e.g., age, income, employment status), the gap can be attributed to differences in language proficiency.

The literature suggests that a range of factors could contribute to differences in health access and outcomes for people with low English proficiency, including challenges with engaging interpreters, ability to form therapeutic relationships with providers, and ability to engage with the healthcare system.[78]

Deloitte Access Economics assumes that each percent reduction in the health outcomes gap – that is a 0.1% improvement in health outcomes for people with low English proficiency – is expected to result in an annual cost saving of $29 per person. This includes:

- $9 in healthcare system costs for the Government. On average, Australia spends $9,500 on health per person, and Deloitte Access Economics assumes a linear relationship between health outcomes and access and health spending.
- $15 in productivity costs for the individual, which captures lower earnings due to worse health outcomes. Typically, each dollar in health system spending is associated with $1.54 in productivity costs.[79]
- $5 in other costs for the Government, including welfare payments and the additional costs of raising taxation revenue. Typically, each dollar in health system spending is associated with $0.34 in non-health Government costs.

A United States study finds that approximately half of all adults with low English proficiency report facing language barriers when accessing health care. This includes issues related to filling out forms for a doctor or health care provider, communicating with office staff at a doctor's office or clinic, or understanding instructions given by a doctor or health care provider.[80]

[75] Grattan Institute (2024), *Patchy protection How to boost GPs' patient vaccination rates*. Available at: https://grattan.edu.au/wp-content/uploads/2024/07/Patchy-Protection-Grattan-Institute-Report.pdf
[76] Jatrana S, Richardson K, Pasupuleti SSR. Investigating the Dynamics of Migration and Health in Australia: A Longitudinal Study. Eur J Popul. 2017 Aug 21;34(4):519-565.
[77] Twersky SE, Jefferson R, Garcia-Ortiz L, Williams E, Pina C. The Impact of Limited English Proficiency on Healthcare Access and Outcomes in the U.S.: A Scoping Review. Healthcare (Basel). 2024 Jan 31;12(3):364.
[78] Pandey, M., Maina, R.G., Amoyaw, J. et al. Impacts of English language proficiency on healthcare access, use, and outcomes among immigrants: a qualitative study. BMC Health Serv Res 21, 741 (2021).
[79] Crosland P, Ananthapavan J, Davison J, Lambert M, Carter R. The economic cost of preventable disease in Australia: a systematic review of estimates and methods. Aust N Z J Public Health. 2019 Oct;43(5):484-495.
[80] Gonzalez-Barrera, A., Hamel, L., Artiga S., and Presiado, M. (2024), Language Barriers in Health Care: Findings from the KFF Survey on Racism, Discrimination, and Health. Available at: Language Barriers in Health Care: Findings from the KFF Survey on Racism, Discrimination, and Health | KFF

The same study also finds that people with low English proficiency who visit providers that speak their preferred language report a 40% decrease in their likelihood of facing language barriers compared to people with low English proficiency who visit providers that do not speak their preferred language.

Consequently, as an illustrative example, Deloitte Access Economics assumes that 50% of the gap in health outcomes between people based on English proficiency is specifically attributable to *language difficulties*, and that consistent access to high quality professional interpreters can reduce difficulties by 40%. Together, it is assumed that sub-optimal access to interpreters contribute to **20% of the health gap** due to English proficiency– representing a 2% difference in health access / outcomes for people with low English proficiency.

The key modelling assumptions for the flow-on health costs are summarised in Table 6.2. Note that the modelling is intended to be illustrative and provide a sense of order of magnitude of the potential indirect costs associated with sub-optimal interpreting. More detailed modelling on the specific relationship between different health outcomes and English proficiency – and the extent to which access to interpreting could reduce the gap – should be undertaken to refine these estimates.

Table 6.2: Modelling assumptions on the per person costs ($ 2023) associated with the gap in health outcomes due to English proficiency

Flow-on cost category	Stakeholder	Every % gap	20% of the gap
Productivity	Individual	$15	$190
Healthcare system	Government	$9	$290
Other government costs	Government	$5	$100
Total		$29	$580

Source: Deloitte Access Economics (2025). Note: Total costs may not equal to the sum of individual cost line items due to rounding.

Applying the per person costs to the population of people with low English proficiency (excluding those in HSP to avoid potential double counting), it is estimated that in 2023, the flow-on costs of sub-optimal interpreting equals $412 million for the Australian economy and society.

When combined with the direct costs, sub-optimal interpreting costed Australia between $738 million (excluding costs associated with latent demand) **and $1.3 billion** (including costs associated with latent demand) **in 2023.**

Table 6.3: Flow-on costs of sub-optimal interpreting ($ million), 2023

Flow-on cost category	$ million
Productivity	207
Healthcare system	134
Other government costs	71
Flow-on costs	**412**
Individual costs	207
Broader society costs	205

Source: Deloitte Access Economics (2025). Note: Total costs may not equal to the sum of individual cost line items due to rounding.

The quantified costs should be considered conservative, and actual costs of sub-optimal language service provision are likely to be higher. This is as flow-on costs outside of health have not been

considered. Disengagement is also likely to occur in other Government settings such as education and justice. For instance, in education, reduced engagement by families due to limited ability to communicate with teachers is associated with worse student outcomes. In the legal setting, underreporting of crimes due to perceived language challenges could lead to escalation, resulting in more serious crimes in the future.

6.2 Future trajectories for the costs of sub-optimal interpreting

6.2.1 Drivers of future economic and social costs

Building on the current costs of sub-optimal interpreting, Deloitte Access Economics projects future economic costs as a function of:

- **Growth in demand for interpreting services.** For a given level of workforce supply, increased demand is expected to result in additional instances of unmet demand (unfilled and latent). Based on the 2023 report, demand for language practitioners, as proxied by the population with low English proficiency, is expected to grow by 1.8% per annum.[81] Further details on the modeling assumptions and approach are given in the 2023 report.
- **Growth in workforce supply.** For a given level of demand, a smaller workforce is expected to result in additional instances of unmet demand.
- **Changes in the quality of the workforce.** For a given level of demand and supply, a workforce with fewer NAATI-certified practitioners (on average) is expected to result in additional instances of low-quality interpreting.

The modelling applies the difference in demand and supply growth rates relative to 2023 levels to project future economic and social costs. The key cost driver assumptions across the three supply scenarios without positive policy change are summarised in Table 6.4. Note that the modelling does not consider potential changes in costs resulting from a greater mismatch in demand and supply for specific languages.

Using scenario 1 as an example:

- Demand is expected to grow by 1.8% per annum, while supply is expected to decrease by 2.0% per annum. This results in the demand-supply gap increasing by 2.1% per annum. The growth in the demand-supply gap is assumed to result in a proportion increase in the economic and social costs associated with (i) unfilled demand and (ii) flow-on costs relative to 2023 levels. That is, as the gap between total demand and supply grows, individuals are expected to have more trouble accessing language services in the future, resulting in more instances of unfilled demand.
- The demand-high quality supply gap is expected to grow at a faster rate, at 3.0% per annum, based on a 1.8% growth in demand and a 1.2% decline in high quality supply per annum. The growth in the demand-high quality supply gap is assumed to result in a proportion increase in the economic and social costs associated with low quality interpreting costs. That is, as the gap between total demand and high quality supply grows, there are more likely to be instances of adverse outcomes resulting from low quality interpreting.

[81] The population with low English proficiency is expected to grow from 732,000 persons in 2024 to 91,600 persons by 2035.This is expected to be driven by: (i) Existing low English proficiency, plus (ii) Net migration of people with low English proficiency, minus (iii) Net change in people being more proficient in English, minus (iv) People with low English proficiency passing away.

Table 6.4: Summary assumptions for drivers of future economic and social costs, annual average growth from 2023 to 2035

	Scenario 1: Business-as-usual	Scenario 2: Gradual decline	Scenario 3: Accelerated decline
Future cost drivers (average annual growth)			
Demand	+1.8%	+1.8%	+1.8%
Total supply of workers	-0.2%	-1.6%	-2.8%
Supply of high quality workers	-1.2%	-2.4%	-3.4%
Growth in costs by cost type (average annual growth)			
Low quality interpreting costs	+3.0%	+4.2%	+5.2%
Unfilled demand costs	+2.1%	+3.5%	+4.6%
Flow-on costs	+2.1%	+3.5%	+4.6%

Source: Deloitte Access Economics (2025). Note: Growth in costs may not equal to the sum of growth in demand minus growth in supply due to rounding.

6.2.2 Future costs of sub-optimal interpreting

The economic and social costs of (i) low-quality interpreting, and (ii) unfilled demand for interpreting are expected to grow from $740 million in 2023 to $945 million by 2035 if workforce supply remained at business-as-usual levels (scenario 1). However, costs could be as high as $1.2 billion if there were to be an accelerated decline in workforce supply (scenario 3).

When including the costs associated with latent demand, the costs of sub-optimal interpreting are expected to grow from $1.3 billion in 2023 to between $1.7 billion (under scenario 1) and $2.0 billion (under scenario 3).

The key economic and social costs of sub-optimal interpreting for 2035 across the three supply scenarios without positive policy change are given in Table 6.5.

Table 6.5: Projections for economic and social costs of sub-optimal interpreting, 2023 versus 2035 ($ millions, 2023 dollars)

	2023	2035	2035	2035
	Current	Scenario 1	Scenario 2	Scenario 3
Direct costs				
Low quality	212	288	320	345
Unfilled demand	115	143	162	178
Latent demand	566	706	802	878
Flow-on costs				
Individuals	207	258	293	321
Society	205	256	291	318
Total costs[1]				
Lower bound: Excluding latent demand	738	945	1,065	1,162
Upper bound: Including latent demand	1,304	1,651	1,867	2,041

Source: Deloitte Access Economics (2025). Note: Total costs may not equal to the sum of individual cost line items due to rounding.

7 Aspirational future state

This chapter outlines the case for improving wages and conditions, and the potential levers required to achieve an aspirational long-term future state for the provision of language services.

7.1 The case for improved wages and conditions (Scenario 4)

Chapter 6 outlines that the economic and social costs associated with sub-optimal interpreting are expected to grow over the next decade without further policy intervention, as the existing workforce continues to decline in size and quality, while demand is expected to grow.

Given the role of pay and conditions in driving labour supply, Deloitte Access Economics models an illustrative improvement in pay, and its effects on labour supply and quality, and any subsequent cost savings for individuals, Government, and broader society.

7.1.1 Future workforce trajectory with improved wages and conditions

Under scenario 4, it is assumed that language practitioners can achieve pay parity with comparable occupations. This would represent a 50% increase in effective hourly wages (from $35 to $51 per hour) over a four-year period. Beyond this period, it is assumed that wages continue to grow in line with occupations.

Box 7.1: A 50% increase in effective hourly wages over four years

The modelling considers a scenario where hourly effective wages for language practitioners increase by 50% over four years. While this is a sizable increase over four years, it is similar in scale to the wage changes seen across recent Enterprise Bargaining Agreements (EBAs), which included a 40% pay increase for NSW police, a 33% pay increase for Victorian paramedics, and a 28% increase for Victorian nurses and midwives.[82,83,84]

While the 50% increase remain higher than the above recent examples, not all of the wage increase needs to be achieved through an increase to hourly wages. Changing employment arrangements such that more language practitioners are employed in permanent roles would provide them access to non-wage benefits (e.g. paid leave entitlement), which could represent up to a 25% increase in their effective wages.[85] Consequently, only a 25% in wages relative to current levels would be required to achieve a 50% increase in the effective hourly wages.

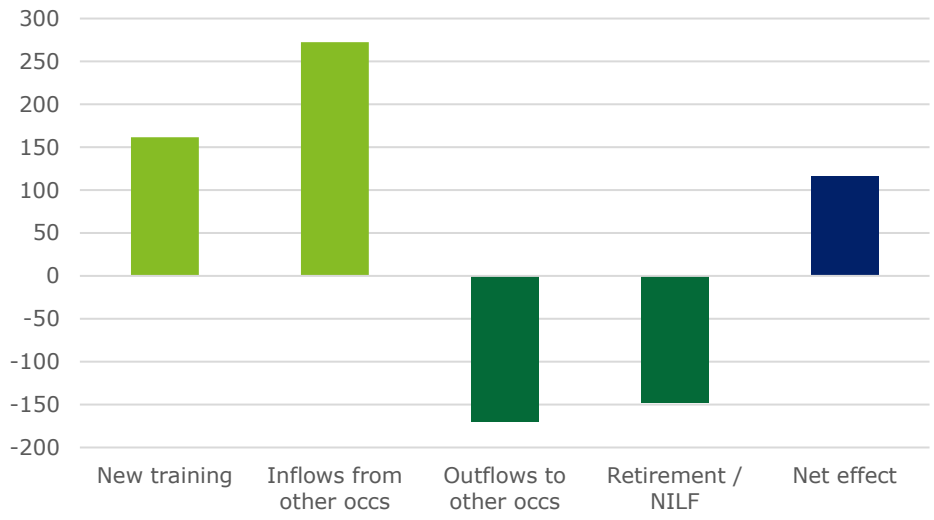
If the average wage elasticities of labour supply are applied to a 50% effective wage increase, this is expected to result in a 17% increase in the labour supply, in the form of additional hours worked by existing workers, attracting new workers to the sector, and reducing attrition from the sector.

[82] 'Ambulance Victoria strikes pay deal with union after more than a year of drawn-out negotiations', *Australian Broadcasting Corporation* (online, 24 September 2024) <https://www.abc.net.au/news/2024-09-24/ambulance-victoria-pay-deal-union/104386982>
[83] 'NSW police win pay rises of up to 40% in biggest wage increase in 30 years', The Guardian (online, 11 November 2024) <https://www.theguardian.com/australia-news/2024/nov/11/nsw-police-pay-rise-minns-government-details>
[84] 'Victorian nurses and midwives to get 'once-in-a-generation' 28% pay rise', *beat* (online, 26 June 2024) <https://beat.com.au/victorian-nurses-and-midwives-to-get-once-in-a-generation-28-pay-rise/>
[85] 25% benchmark based on the loading typically associated with casual employment.

The increase in labour supply is likely to be driven predominantly by mid-career professionals, as they are more likely to be parents, and more responsive to changes in the wage rate.

Scenario 4 is expected to lead to a net inflow of 120 workers into the occupation per annum. This would represent a CAGR of 1.9% over the next decade, which is significantly higher than the -0.5% seen from 2016 to 2024, and put it in the top half of all occupations based on the historic growth rate between 2016 and 2021. The contribution of individual inflows and outflows to language practitioner supply under scenario 4 is given in Chart 7.1.

Chart 7.1: Contribution to average annual change in worker supply (Scenario 4), 2024 to 2035



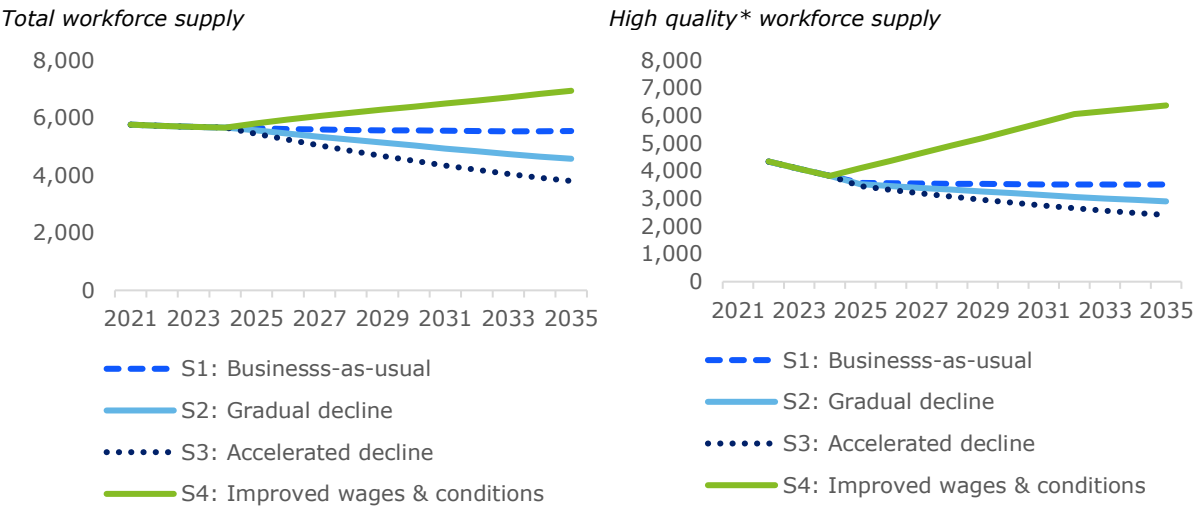
Source: Deloitte Access Economics (2025)

Scenario 4 results in a total of 6,940 language practitioners by 2035. Improved pay and conditions are also likely to be effective in both retaining and attracting high quality language practitioners, and create incentives to keep NAATI certifications current. The modelling assumes that 92% of all language practitioners will be NAATI NAATI-certified, representing 6,360 workers.[86]

A comparison of workforce supply trajectories for scenario 4 compared to the three scenarios without positive policy intervention is given in Chart 7.2.

[86] Benchmarked against the Department of Home Affairs Language Sector Sustainability Survey, and the certification of respondent interpreters for the *first language* that they interpret for.

Chart 7.2: Trajectories for interpreter and translator workforce supply (2025 to 2035), *effective* headcount^



Source: Deloitte Access Economics (2025). *NAATI-certified workforce includes: interpreters who are certified, certified provisional, or recognised by NAATI.. NAATI-certified workers as a share of total workforce estimated based on select LSP data on the proportion of interpreting assignments delivered NAATI-certified interpreters. ^Based on the average hours worked by a current worker.

7.1.2 Implications for broader economic costs

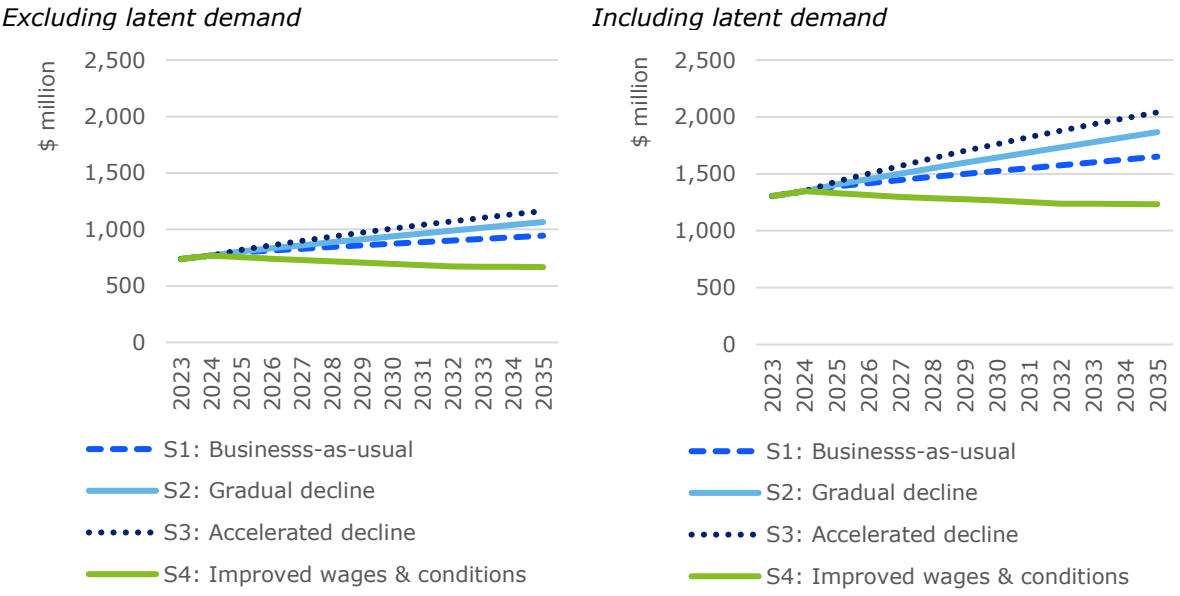
A larger and higher quality language practitioner workforce is expected to reduce the occurrence of sub-optimal interpreting in the future. Under scenario 4, growth in the supply of interpreter and translators is expected to keep pace – and marginally surpass – the growth in demand for language services.

The change in the demand-supply gap for language practitioners over time is used to project the annual economic and social costs. For example, a 10% decrease in the gap relative to 2023 levels is expected to result in a 10% reduction of the costs from 2023 levels.

As the workforce gap decreases over time under scenario 4, the total annual economic and social costs from low quality and unfilled demand for interpreting are expected to decrease over time. However, as an overall workforce gap is expected to persist, there are still significant costs associated with the scenario.

Under scenario 4, the annual costs of sub-optimal interpreting will be $665 million by 2035, down from $738 million in 2023. When including the costs associated with latent demand, the total costs are estimated at $1.2 billion. A comparison of the economic cost trajectories across the four scenarios is given in Chart 7.3.

Chart 7.3: Trajectories for the annual economic and social costs of sub-optimal interpreting, 2025 to 2035, ($ millions, 2023 dollars)



Source: Deloitte Access Economics (2025).

Relative to the three scenarios without positive policy change, improved wages and conditions (scenario 4) will result in a lower bound annual cost saving of between $279 million and $496 million for the Australian economy by 2035.[87] When summing the difference in annual costs over the decade between scenario 4 and the other scenarios, this is expected to result in a cumulative cost saving of between $1.9 billion (scenario 1) and $3.3 billion (scenario 3) relative to over the period from 2025 to 2035. When including the costs of latent demand, this is expected to result in a cumulative cost saving of between $2.8 billion and $5.3 billion from 2025 to 2035 (Table 7.1).

Table 7.1: Cost savings under scenario 4 relative to scenarios 1 to 3, ($ millions, 2023 dollars)

	Scenario 1	Scenario 2	Scenario 3
Annual savings (2035)			
Lower bound (excluding latent demand)	279	399	496
Upper bound (including latent demand)	418	634	808
Cumulative savings (2025 to 2035), undiscounted			
Lower bound (excluding latent demand)	1,898	2,616	3,302
Upper bound (including latent demand)	2,793	4,081	5,310

Source: Deloitte Access Economics (2025).

[87] The $279 million saving is calculated as the difference in estimated economic and social costs (excluding latent demand) between scenario 4 and scenario 1 for 2035. The $496 million saving is calculated as the difference in estimated economic and social costs (excluding latent demand) between scenario 4 and scenario 3 for 2035.

7.1.3 Role of a national award in improving pay and conditions

Currently, only a very small number of language practitioners are covered by existing national awards (aged care and health). While the introduction of a national award can be one avenue for improving pay and conditions, it is uncertain whether *minimum* standards alone would be sufficient to raise pay to the required standards given in Scenario 4 above (i.e., a 50% increase in effective pay). A smaller increase in pay will correspondingly lead to a smaller effect on labour supply, and result in lower economic cost savings.

Nonetheless, the establishment of a national award, in particular a minimum wage, was consistently highlighted by stakeholders as a necessary step to achieving minimum working conditions in the language services sector. In consultations, one LSP highlighted:

> *"We need to create an explicit language services modern award that recognises and pays higher qualifications and experience more, receives CPI adjustments and has minimum work hours. This would* ***create an even playing field and avoid private LSPs undercutting each other****." – LSP*

In 2022, Professionals Australia and the Australia Industry Group submitted a draft proposed national languages services award.[88] The proposed award presented a range of minimum hourly rates based on the qualification level of the practitioner, outlined in Table 7.2.

Note that the proposed minimum wage language services award is lower than the established minimum wages seen in the Aged Care and Health Professionals and Support Services awards. Furthermore, the proposed language service minimum wage is lower than the current pay rates for interpreters and translators that work with Government ($35 in effective pay (see section 3.3.1 and 3.3.2)).

Table 7.2: Minimum hourly rates proposed in language services national award

Classification	Minimum hourly rate ($)		
	Proposed language services award	**Aged Care award**	**Health Professionals and Support Services award**
Non-NAATI-certified interpreter/ translators	$24.76	N/A	$29.09
Recognised practising interpreter/ translator	$25.60	N/A	N/A
Certified Provisional interpreter	$26.98	N/A	N/A
Certified interpreter/ translator	$27.46	N/A	N/A
Certified specialist interpreter (health & legal)	$28.40	$30.13	$30.13
Certified conference interpreter/ certified advanced translator	$28.40	N/A	N/A

Source: Deloitte Access Economics (2025).

The proposed minimum wages have received a reasonable level of opposition from within the language services sector, with one peak body highlighting:

[88] FairWork Commission, *Proposed Language Services Industry Award (AM2022/36)*, (24 October 2024), <https://www.fwc.gov.au/work-conditions/awards/create-or-change-award/applications-create-or-change-award/proposed>

> *"While we wanted to support the proposed national award and believe in the role of an award in establishing minimum working conditions, we could not put our support behind **a national award with such low minimum wages**." – Peak body*

Some stakeholders have also indicated the need for a dedicated body representing the interests of language service practitioners in setting minimum wages.

Lastly, while a national award would introduce a minimum wage and other standard working entitlements such as ordinary hours of work, it fails to introduce other occupation-specific minimum working conditions associated with the task-based employment model such as the lack of professional development and preparation time (see section 3.6). Stakeholders noted the need for broader system reform beyond increasing wages, one LSP noted:

> *"**Maintaining the same system and increasing the pay is not going to solve the problem**, it's a band aid solution, we will just have the same problem in five years' time." – LSP*

7.2 Broader levers to further reduce costs of sub-optimal interpreting

While achieving parity in pay and conditions for interpreters and translators would reduce the costs of sub-optimal interpreting, this should be supplemented with other actions in the short and medium term. For instance, under scenario 4, the sub-optimal interpreting is expected to continue to cost the Australian Government and society up to $1.2 billion per annum by 2035. Further cost savings will increasingly be driven by non-wage and pay related levers.

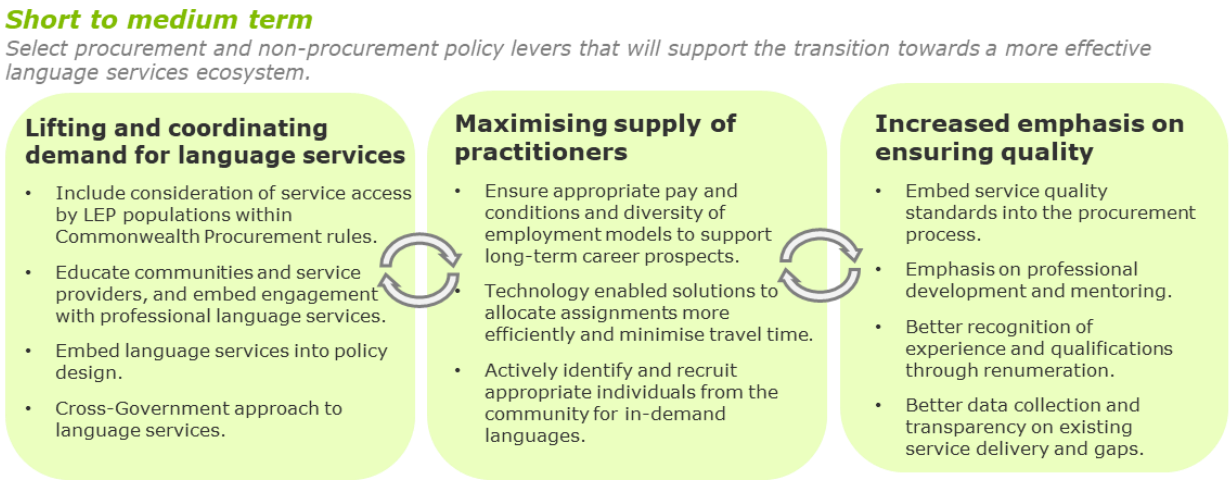
7.2.1 Short to medium term levers

In the short to medium term, a range of complementary procurement and non-procurement levers are required to support sector sustainability. Select levers are given in Figure 7.1, with the full set of levers aimed at supporting sector sustainability in the short to medium term outlined in the *procurement strategy* report.

The levers should work together to achieve the following three objectives, which are critical for a sustainable language services sector (Figure 7.1):

- **Lifting and coordinating demand for language services.** Increasing awareness and demand for interpreting services is first and foremost critical for reducing instances of latent demand, and ensuring professional language practitioners are sufficiently utilised. Further, greater demand – either in levels or through increased coordination in how Governments across all levels demand language services– is required to support permanent employment models, which are typically associated with better non-wage conditions.
- **Maximise the supply of high-quality practitioners in line with demand**. While improved wages and conditions will be a key lever for attracting and retaining quality language practitioners, there are also other levers. For instance, this includes using the available workforce in a more efficient manner (e.g. using technology to assign language practitioners to assignments that are close by to minimise travel time), and more active recruitment of potential interpreters for in-demand languages.
- **Ensure appropriate mechanisms are in place to consistently deliver high quality language services.** This would involve greater support for the sector to continually invest in quality, training and development, supported through better data collection.

Figure 7.1: Broader levers required to reduce economic and social costs of sub-optimal interpreting (short to medium term)



Source: Deloitte Access Economics (2025).

7.3 Medium to long term policy levers

In the longer term, systematic changes that centres the user, and provide more choice in accessing language services in an integrated manner would ensure access to high quality Government services and unlock the full economic and social potential for people with low English proficiency.

Across a range of reform sectors – notably in the early childhood education and care, First Nations and disability sectors – the design of government service delivery has been shifting. These changes may serve as a reflection of best practice principles and more effective approaches to service delivery. The two fundamental principles underpinning service design reform in these sectors are explored below.

7.3.1 User-centred service delivery

The model is defined by consumer choice, where consumers of services receive funding and have the autonomy to select their own service providers in accordance with their needs. It typically operates on a demand driven basis, where all eligible individuals receive access.[89] This approach can enhance quality and affordability by enhancing competition between providers, however its success depends on the market functioning effectively including good information for consumers, ensuring ample market choice and low transaction costs.[90] Furthermore, accessibility may be compromised if safeguards are not implemented to ensure provision in thin markets. Box 7.2 explores user-centered service delivery in practice in the National Disability Insurance Scheme (NDIS).

Box 7.2: An example of a user-centered services | NDIS

The NDIS is an Australian Government insurance-based entitlement model that allocates personalised funds to eligible participants. The scheme offers individuals the flexibility to use their funding in ways that best support their needs. This approach is motivated by the large diversity of support needs of individuals with a disability (e.g., employment, home modifications, household tasks).

[89] The Front Project, 'Funding Models and Levers for Early Childhood Education & Care', <https://www.thefrontproject.org.au/media/attachments/2022/08/30/ecec-funding-models-and-levers.pdf>
[90] Social Ventures Australia, 'Happy, health and thriving children', (May 2023), <https://www.socialventures.org.au/wp-content/uploads/2024/07/Enhancing-the-impact-of-our-Integrated-Child-and-Family-Centres-in-Australia.pdf>

In the language services context, users have more choice in working with practitioners and the situations where they require language services, this is intended to improve relationship continuity.

7.3.2 Integrated service delivery

The model is characterised by the co-location of key services which simplifies access and ensures individuals are able access universal services and tiered supports as needed. This approach is motivated by complex and fragmented service delivery, which can be difficult to navigate for those with the greatest needs, and who are the least likely to receive the comprehensive support they require. Integrated service delivery has the potential to overcome these barriers by allowing access to a range of key services, responding holistically to the individual's needs. Box 7.3 explores integrated service delivery in practice in Aboriginal and Torres Strait Islander integrated early years centres.

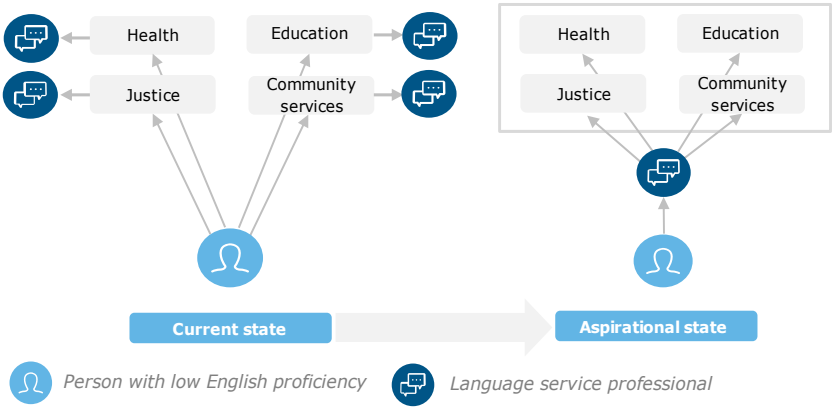
Box 7.3: An example of integrated service delivery | Aboriginal and Torres Strait Islander integrated early years centres

Aboriginal Child and Family Centres receive funding from both the Australian Government and State Government and offer culturally-safe service to Aboriginal communities. Centres adopt a holistic approach to delivery care and offer a large variety of services including early childhood education and care, child and maternal health services, family support, playgroups and adult education opportunities.

In the language services context, this could involve an integrated approach to settlement services (with embedded language service support) to help new migrants settle and thrive in Australia. This approach could leverage case managers provided under various settlement programs (e.g., Humanitarian Settlement or Settlement Engagement and Transition Support programs), and coordinate access to a range of services, supported by a single language practitioner (where possible) to ensure both ease of access and continuity when accessing different services.

Figure 7.2 explores how these two design principles may be applied in an aspirational state of the language services sector relative to the current state. In the current state each service is responsible for coordinating their own language service professional, meanwhile in the aspirational state the use and access is driven by the person with low English proficiency.

Figure 7.2: Current and aspirational state of language services sector

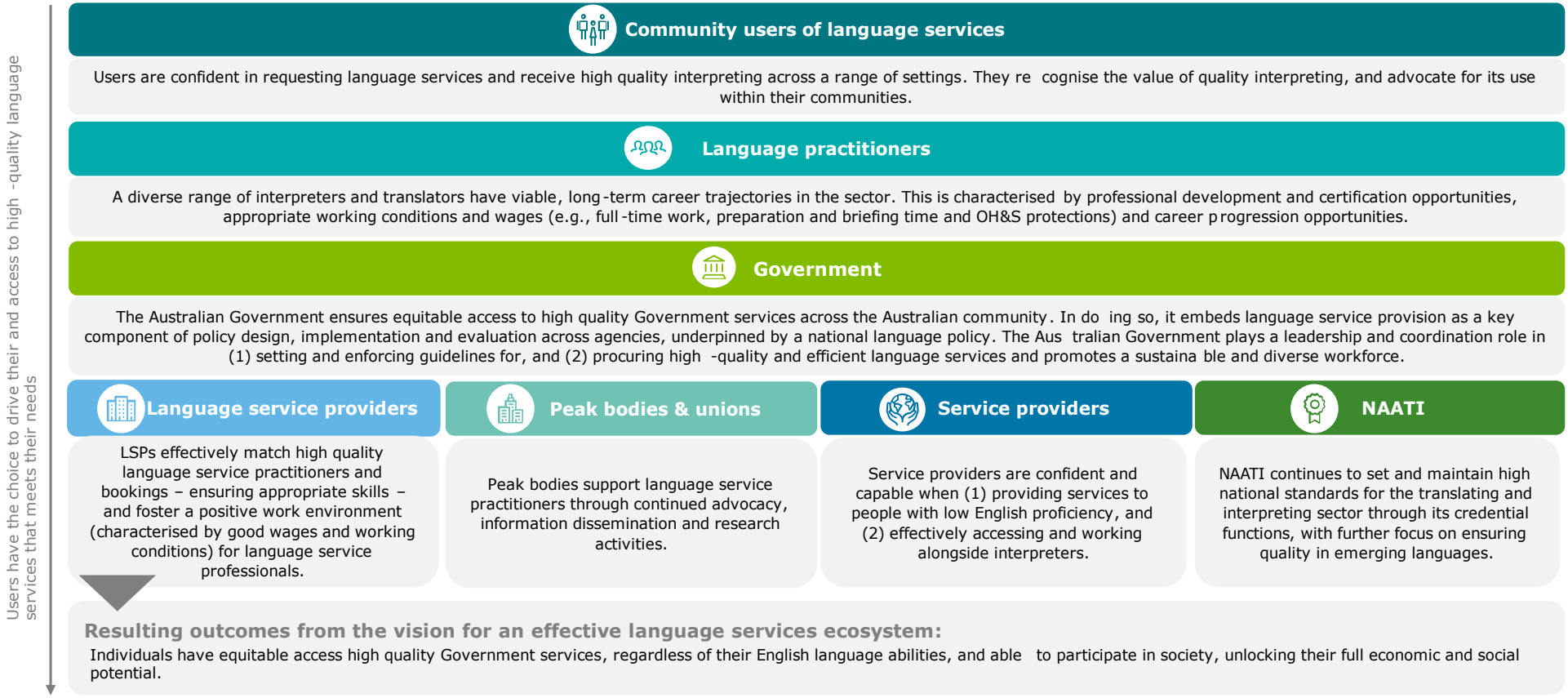


Source: Deloitte Access Economics (2025)

7.4 Vision for an effective language services ecosystem

Figure 7.3 outlines a vision for a user-centered approach to accessing high-quality language services that is enabled through appropriate Government and service provider mechanisms and practices. Achieving the vision would allow consistent access to high quality Government services and unlock the full economic and social potential for people with low English proficiency.

Figure 7.3: Vision for an effective language services ecosystem



Source: Deloitte Access Economics (2025).

Appendix A : Evidence underpinning the conceptual framework

A.1. Three age-based personas

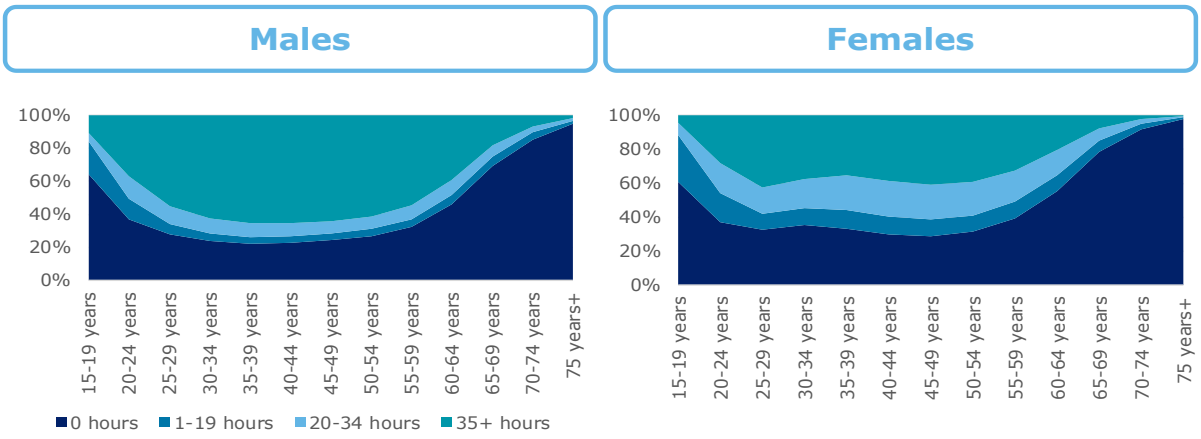
As it is not possible to understand each individual worker motivations with the available data, the analysis has developed three age-based personas that broadly characterise labour market experiences across the economy.

While men and women possess distinct labour market experiences which is largely a reflection of different caring duties, for a full-time equivalent worker weekly hours worked (Chart A.1) and earnings (Chart A.2) tend to peak in an individual's mid-career (an individual aged between 30 and 49).

Consequently, three personas have been developed by grouping age groups based on their average weekly hours worked and their weekly earnings:

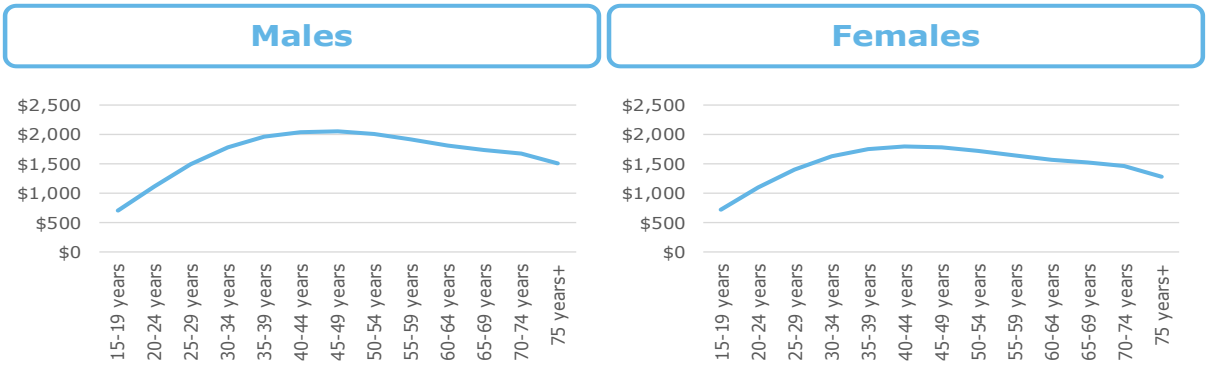
- Early career professionals: aged between 15 and 29 years of age
- Mid-career professionals: aged between 30 and 49 years of age
- Late career professionals: aged over 50.

Chart A.1: Weekly hours worked and by gender, 2021



Source: Australian Census (2021)

Chart A.2: Weekly earnings and by gender, 2021



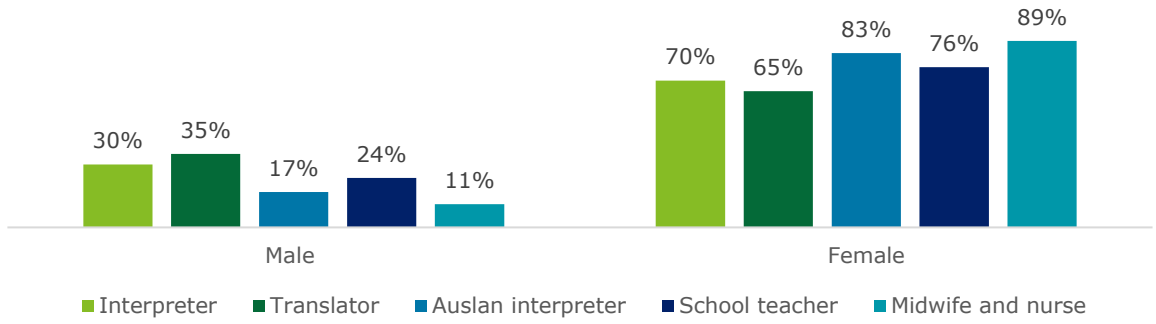
Source: Australian Census (2021)

A.2. Characteristics of language practitioners with comparable occupations

The analysis leverages three comparable occupations (Auslan interpreters, school teachers and midwives and nurses) to serve as benchmarks to better understand employment conditions and trends in the language services sector.

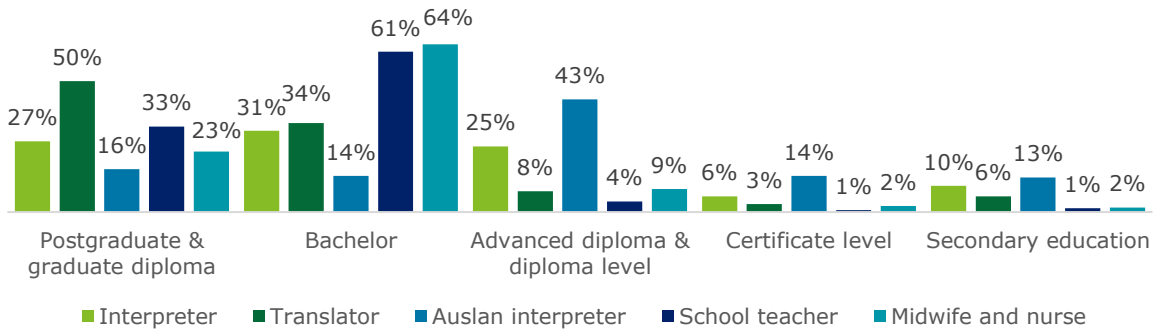
Consistent with interpreters and translators, comparable occupations represent other essential services and share similar characteristics to the language services workforce, notably these occupations represent highly-skilled female dominated occupations (Chart A.3 and Chart A.4).

Chart A.3: Gender profile of interpreters, translators and comparable occupations, 2021



Source: Australian Census (2021)

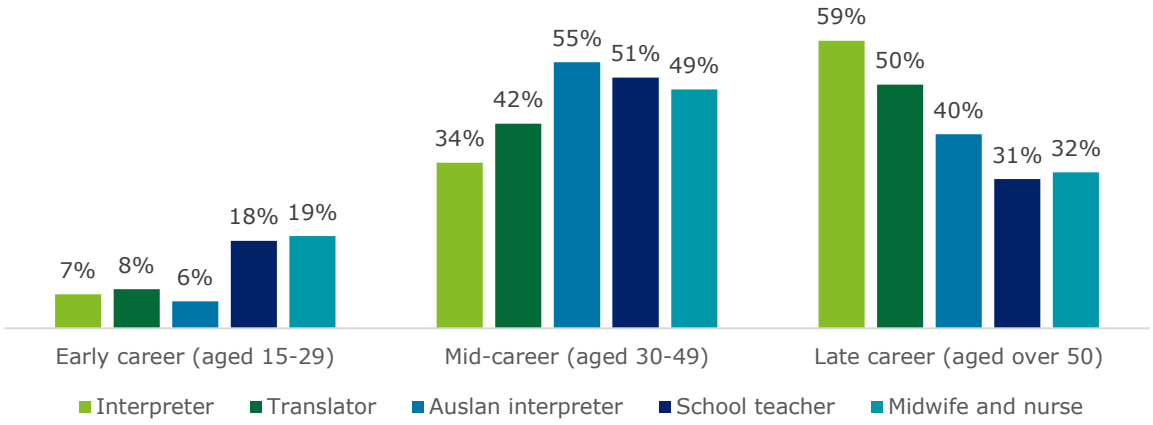
Chart A.4: Qualification profile of interpreters, translators and comparable occupation, 2021



Source: Australian Census (2021)

Comparable occupations exhibit a slightly younger age profile relative to the interpreter and translator workforce (Chart A.5). Interpreters and translators possess a median age of 52 and 49 respectively, meanwhile comparable occupations exhibit a median age of around 40 years.

Chart A.5: Age profile of interpreters, translators and comparable occupations, 2021



Source: Australian Census (2021)

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