



# **Property Services Industry Reference Committee Four-Year Work Plan**

**September 2016**

## Document Control

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# Executive Summary

This Four Year Work Plan identifies the key skills and training requirements for the property services industry for the period 2016 – 2020.<sup>1</sup> It has been prepared by Artibus Innovation, Skills Service Organisation for the Property Services industry. Based on a national and international evidence based research model, this report offers an overview of the challenges, technological and environmental impacts and emerging opportunities affecting the industry and its skills needs.

## Overview of the Industry

The industry employs more than 1.8 million Australians that operate in 11 sectors and sub-sectors.<sup>2</sup>

- *Waste collection*
- *Property operations and real estate services*
- *Architectural*
- *Public order and safety*
- *Swimming pool and spa servicing*
- *Facility management*
- *Surveying and spatial information services*
- *Treatment and disposal services*
- *Building cleaning and pest control*
- *Engineering and technical services*
- *Fire and protection inspection and testing*
- *Strata management*
- *Access consulting*

The property and real estate services sector is one of the largest industry groups. As of 2015, over 200,000 businesses were operating within the sector.

## Employment

The industry has experienced periods of aggregate growth, stagnation and decline. Between 2011–2015, the cleaning and pest control services, for example, experienced a prolonged period of stagnated sectoral growth including a recent net decline of employment levels in 2015.

Major employment growth is anticipated to occur in the following sectors:

- Waste collection
- Public order and safety
- Property operations and real estate services

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<sup>1</sup> In accordance with the AISC template guidelines and in association with the Property Services Industry Reference Committee (IRC) this analysis strategically reviewed the industry's skills needs and workforce development by considering (i) key input from industry stakeholders; (ii) nation-wide industry consultations; (iii) both a qualitative and quantitative review of international and national article publications; and (iv) data from governmental sources.

<sup>2</sup> Construction & Property Services Industry Skills Council: <http://www.cpsisc.com.au/resource-centre/PSUG/Overview/Workforce>.

## **Skills Outlook / Emerging Trends**

Research and consultation suggests the emergence (and consolidation) of the following three macro trends:

- **Technological Disruption:** Technology in the industry (i.e. impacting processes, procedures, tools and opportunities) was extensively reported as a significant trend among the survey responses. A strong emphasis was placed on the impact of Business Information Modelling (BIM) by different sectors of the industry.
- **Environmental Sustainability:** Sustainability is impacting the industry in many forms, from a regulatory, process and material.
- **Digitalisation of Business Processes:** Advancements in information and communication technologies have resulted in a myriad of new methods and means of ‘doing business’. This is impacting on regulatory frameworks, job design and the emergence of new skills.

These trends are significantly impacting workplace skills, job design and training package development and delivery in the industry.

## **Four-Year Work Plan Overview**

| <b>Training Package Development Plan</b> |  |
|--|--|
| <b>Year</b>                              | <b>Assessment and Review of Qualifications/Units</b>   |
| 2016 – 17                                | <ul style="list-style-type: none"><li>• Review of Security Qualifications</li><li>• Property Services Qualifications update to 2012 standards</li><li>• Fire Inspection Qualifications: update to 2012 standards</li><li>• Cleaning and Access Qualifications: update to 2012</li><li>• Cert I-III Case for Endorsement (Review)</li></ul> |
| 2017 – 18                                | <ul style="list-style-type: none"><li>• <b>Building Information Modelling (BIM) and Property Services Project</b></li></ul>  |
| 2018 – 19                                | <ul style="list-style-type: none"><li>• <b>Sustainability Project</b></li><li>• Urban Pest Management</li></ul>  |
| 2019 – 20                                | <ul style="list-style-type: none"><li>• <b>Services</b></li><li>• Surveying and Spatial Information Services</li></ul>   |

\*For a more detailed account of the Calendar Review Plan (e.g. qualification codes, units of competency etc.) see pages 26 – 29 of the Property Services Four-Year Plan.



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# Part One – Industry Analysis

## Administrative Information

IRC: Property Services (CPP and CPP07)

SSO: Artibus Innovation

## Methodology

In preparing this work plan, Artibus Innovation has relied on a range of quantitative and qualitative data sources, which have provided a detailed insight into the skills and development issues facing the property services industry in Australia. The methodology for gathering this industry intelligence has included:

- An online survey of 175 property services industry members conducted in June 2016, gathering both quantitative and qualitative data from employers, Registered Training Organisations (RTOs), industry regulators, and employees/students in relation to the relevance and operation of the training packages, broader industry skills needs, industry trends and technologies on the horizon;
- A review of published quantitative data from official sources such as the Australian Bureau of Statistics, federal government agencies and industry reports;
- A review of published qualitative data and articles from recognised industry publications such as Ibis World;
- Feedback from key industry players and representative bodies on the Property Services Industry Reference Committee.
- Feedback received through industry consultation on current training package review projects and general industry correspondence; and
- Use of Research Officers and Executive Officers to obtain on-the-ground feedback from industry representatives through targeted interviewing.

As a result of these methods, Artibus Innovation has obtained information from industry members in each state and territory and from across the different user groups of the property services training packages.

# Sector Overview

The property services industry contains several disparate sectors that are difficult to meaningfully analyse at an industry level. For this reason, industry analysis has been undertaken at a sectoral level, which is detailed in the table below (table 1). The table contains an account of each industry sector, the relevant CPP and CPP07 qualifications, an analysis of the business environment, the respective stakeholders, applicable licences and both the challenges and opportunities in each sector.

Key stakeholders at an industry level include:

- Department of Education and Training;
- Australian Industry and Skills Committee (AISC);
- Other IRCs or SSOs;
- Industry (including employers, employees, industry associations, peak bodies, and unions);
- Students;
- Ministers with portfolio responsibility for training packages;
- State Training Authorities;
- State and Territory governments;
- Registered Training Organizations (RTOs), RTO staff and RTO representative organisations;
- Relevant industry regulators and their representative cross jurisdictional organisations and or committees;
- Law enforcement bodies; and
- Lobby groups.

Relevant peak bodies and industry associations at a sectoral level are also identified below:

| Sector Descriptions and Analysis                  |  |
|---|--|
| Waste Collection, Treatment and Disposal Services |  |
| Description                                       | This sector is mainly involved in the collection, treatment and disposal of waste. Relevant subsectors include waste collection (e.g. solid) and waste |

|                                     |  |
|-------------------------------------|--|
|                                     | treatment disposal and remediation services (including materials recovery services).   |
| <b>Qualifications</b>               | CPP20411 Certificate II in Waste Management<br>CPP30711 Certificate III in Waste Management<br>CPP40911 Certificate IV in Waste Management<br>CPP50811 Diploma of Waste Management   |
| <b>Analysis of businesses</b>       | As of 2015, there were 4,132 businesses operating in this sector. Between 2014-15, 602 businesses entered the sector and 527 businesses exited. 47% of all businesses are one-person operations. <sup>3</sup> In terms of market share, the sector is dominated by several large businesses, including Veolia Environmental Services and Suez Recycling and Recovery. <sup>4</sup> While waste collection services have a low level of globalisation, waste treatment and disposal services have high levels of foreign ownership. |
| <b>Peak bodies</b>                  | Waste Management Association of Australia, Facility Management Association of Australia, Property Services Industry Advisory Body, Professionals Australia, United Voice, Building Service Contractors Association of Australia, Strata Community Australia.   |
| <b>Applicable licencing</b>         | <ul style="list-style-type: none"> <li>• No national occupational licences.</li> <li>• Waste management facilities are licenced according to state and territory requirements.</li> </ul>  |
| <b>Challenges and opportunities</b> | <ul style="list-style-type: none"> <li>• Over 50% of the workforce has no formal qualifications.<sup>5</sup></li> <li>• Technological advancements for waste treatment, disposal and remediation is predicted to be an important market in the future, particularly the conversion of waste into energy.<sup>6</sup></li> <li>• Environmental protection is a primary driver of regulation and environmental standards are increasing.</li> </ul>  |

### Property Operators and Real Estate Services

|                               |  |
|-------------------------------|--|
| <b>Description</b>            | Property operators include both residential and non-residential property operations and mainly involve renting, leasing and managing properties. Real estate services consist of valuing, purchasing, selling, managing or renting real estate for others.   |
| <b>Qualifications</b>         | CPP30211 Certificate III in Property Services (Agency)<br>CPP30311 Certificate III in Property Services (Operations)<br>CPP40307 Certificate IV in Property Services (Real Estate)<br>CPP40407 Certificate IV in Property Services (Stock and Station Agents)<br>CPP40507 Certificate IV in Property Services (Business Broking)<br>CPP40611 Certificate IV in Property Services (Operations)<br>CPP50307 Diploma of Property Services (Agency Management)<br>CPP50409 Diploma of Property Services (Business Broking) |
| <b>Analysis of businesses</b> | As of 2015, there were 209,181 businesses operating in this sector. Between 2014-15, 21,941 businesses entered the sector and 17,916   |

<sup>3</sup> Australian Bureau of Statistics: 81650 Counts of Australian Businesses, including Entries and Exits, June 2011- June 2015.

<sup>4</sup> IBISWorld Industry Reports on Solid Waste Collection Services, Other Waste Collection Services, Waste Treatment and Disposal Services, and Waste Remediation and Materials Recovery Services (2015-16).

<sup>5</sup> Commonwealth Department of Employment (Labour Market Information Portal): Educational Attainment by Industry Sector (2014).

<sup>6</sup> For example, Licella biofuels and biochemical from waste biomass (see: <http://www.igniteer.com/licella/>).

|  |   |
|--|---|
|  | <p>businesses exited.<sup>7</sup> 87% of businesses were non-employing as of 2015.<sup>8</sup> Businesses with a significant market share in this sector include Defence Housing, LJ Hooker, Ray White Group, First National Real Estate, and CBRE Pty Ltd.<sup>9</sup> While property investments are generally made domestically, there are high levels of foreign investment in the non-residential and real estate services subsectors. In addition, most of the large commercial real estate services have been sold to or are owned by overseas investors.</p>  |
| <b>Peak bodies</b>                                       | Building Service Contractors Association, Facility Management Association, Prudential Investment Company, Real Estate Institute of Australia, Strata Community Australia, Property Services Industry Advisory Body Network, Professionals Australia, United Voice, Surveying and Spatial Sciences Institute, Swimming Pool and Spa Association and National Fire Industry Association.  |
| <b>Applicable licencing</b>                              | Real estate agents are required to be licenced according to state and territory requirements.   |
| <b>Challenges and opportunities</b>                      | <ul style="list-style-type: none"> <li>Technological changes are predicted to have a significant impact on this industry, particularly in the area of digitalisation. These changes will impact the job roles of those working in this sector, as well as the skills required of employees. The changes will impact both new entrants and the existing workforce.</li> <li>There is a high level of regulation in this sector, with requirements differing considerably between each state and territory. Employees in this sector must be aware of regulatory requirements.</li> <li>The high number of sole-traders has implications for training and workforce development.</li> </ul>   |
| <b>Architectural, Engineering and Technical Services</b> |   |
| <b>Description</b>                                       | This sector covers architectural services (including building design and inspection), surveying and mapping services and other specialised design services (including signs and graphics).  |
| <b>Qualifications</b>                                    | CPP20116 Certificate II in Surveying and Spatial Information Services<br>CPP30216 Certificate III in Surveying and Spatial Information Services<br>CPP41110 Certificate IV in Home Sustainability Assessment<br>CPP41212 Certificate IV in NatHERS Assessment<br>CPP40216 Certificate IV in Surveying<br>CPP40316 Certificate IV in Spatial Information Services<br>CPP40115 Certificate IV in Building Design Drafting<br>CPP50216 Diploma of Spatial Information Services<br>CPP50911 Diploma of Building Design<br>CPP50116 Diploma of Surveying<br>CPP51012 Diploma of Residential Building Energy Assessment<br>CPP60116 Advanced Diploma of Surveying<br>CPP80113 Graduate Certificate in Building Design<br>CPP80213 Graduate Certificate in Building Design |

<sup>7</sup> Australian Bureau of Statistics: 81650 Counts of Australian Businesses, including Entries and Exits, June 2011- June 2015.

<sup>8</sup> Note: data for this sector includes property operators renting or leasing their own residential property.

<sup>9</sup> IBISWorld: Industry Reports on Residential Operators, Non-Residential Operators and Real Estate Services (2016).

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| <b>Analysis of businesses</b>             | As of 2015, there were 63,024 businesses operating in this sector. <sup>10</sup> Between 2014-15, there was a slight net decline in the number of businesses (<1%). 53% of businesses were non-employing as of 2015 and 45% employed between 1-19 people. <sup>11</sup> This sector has low levels of foreign ownership and globalisation; however, this is increasing. <sup>12</sup> The requirement for registration and accreditation limits import competition. Some local surveying firms also operate in international markets.  |
| <b>Peak bodies</b>                        | Australian Graphic Design Association, Association of Building Sustainability Assessors, Building Designers Australia, Consulting Surveyors National, Strata Community Australia, Surveying and Spatial Sciences Institute and Professionals Australia, United Voice.  |
| <b>Applicable licencing</b>               | A licence is required in some states for a few building design, surveying and spatial information services occupations.  |
| <b>Challenges and opportunities</b>       | <ul style="list-style-type: none"> <li>It is predicted that this sector will face a 7% decline in employment numbers in the next five years.<sup>13</sup></li> <li>The importance of technology and the high cost of equipment is a barrier to entry for the many sole-traders and micro businesses bidding for contracts.</li> <li>The use of technology has also led to a reduction and separation between the industry's occupations. While the knowledge base remains discrete, the range of technological tools used at task level have led to skill sets that can be used across a range of occupations.</li> </ul>  |
| <b>Building Cleaning and Pest Control</b> |  |
| <b>Description</b>                        | Relevant subsectors of this sector include cleaning services and pest management.  |
| <b>Qualifications</b>                     | CPP20611 Certificate II in Cleaning Operations<br>CPP30316 Certificate III in Cleaning Operations<br>CPP30115 Certificate III in Urban Pest Management<br>CPP40416 Certificate IV in Cleaning Management   |
| <b>Analysis of businesses</b>             | As of 2015, there were 25,946 businesses operating in cleaning services and 2,801 businesses operating in pest control services. <sup>14</sup> Between 2014-15, there was a slight net decline in the number of businesses operating in the cleaning services (-0.4%), and a slight net growth in the number of businesses in pest control (0.1%). <sup>15</sup> 62% of all businesses in this sector were non-employing as of 2015 and 35.7% employed between 1-19 people. Cleaning services has low levels of globalisation, although this is expected to increase due to the international expansion of Australian operators. <sup>16</sup> The pest control industry is also increasingly, being influenced by global factors, including global warming, longer pest seasons, growing urbanisation and global trade. |

<sup>10</sup> Australian Bureau of Statistics: 81650 Counts of Australian Businesses, including Entries and Exits, June 2011- June 2015.

<sup>11</sup> Ibid.

<sup>12</sup> IBISWorld: Industry Reports on Architectural, Surveying and Mapping and Specialised Design Services in Australia (2015-16).

<sup>13</sup> Commonwealth Department of Employment (Labour Market Information Portal): Industry Employment Growth and Projections by Industry Sector (2015).

<sup>14</sup> Australian Bureau of Statistics: 81650 Counts of Australian Businesses, including Entries and Exits, June 2011- June 2015.

<sup>15</sup> Ibid.

<sup>16</sup> IBISWorld: Industry Reports on Commercial Cleaning Services (2015-16).

|                                     |  |
|-------------------------------------|--|
| <b>Peak bodies</b>                  | Australian Environmental Pest Managers Association, Building Service Contractors Association of Australia, Facility Management Association of Australia, Professionals Australia, United Voice.  |
| <b>Applicable licencing</b>         | <ul style="list-style-type: none"> <li>Pest management is a licenced occupation and all operators in every state except Western Australia must complete the unit of competency CPPSS00046 (Manage non-timber pests).</li> <li>In WA, a provisional licence may be granted after completing the unit of competency CPPMT3006 (Manage pests by applying pesticides). The Certificate III must be achieved over a period of 12 months to continue practicing.</li> <li>Cleaning is not a licenced occupation.</li> </ul>  |
| <b>Challenges and opportunities</b> | <ul style="list-style-type: none"> <li>Approximately 62% of this workforce does not have formal qualifications.<sup>17</sup></li> <li>There are few entry barriers in the cleaning services sector due to the lack of regulation. Furthermore, this sector remains an attractive occupation for migrants and international students: LLN is a key priority skill as a result of this.</li> <li>In the pest control subsector, operators must now successfully complete accredited training.</li> <li>Drivers of regulation in pest control include public health, consumer protection, biosecurity and consumer demand.</li> <li>In the future, the focus of pest control will shift towards prevention, minimal use of chemicals and greater awareness of environmental effects.</li> </ul> |
| <b>Public Order and Safety</b>      |  |
| <b>Description</b>                  | This sector includes the investigation, security services and fire protection services.  |
| <b>Qualifications</b>               | CPP10107 Certificate I in Security Operations<br>CPP20212 Certificate II in Security Operations<br>CPP20307 Certificate II in Technical Security<br>CPP20511 Certificate II in Fire Protection Inspection and Testing<br>CPP30411 Certificate III in Security Operations<br>CPP30507 Certificate III in Technical Security<br>CPP30607 Certificate III in Investigative Services<br>CPP30811 Certificate III in Fire Protection Inspection and Testing<br>CPP40707 Certificate IV in Security and Risk Management<br>CPP50611 Diploma of Security and Risk Management  |
| <b>Analysis of businesses</b>       | As of 2015, there were 6,404 businesses operating in this sector. Of these businesses, 6,016 businesses were operating in the investigation and security services subsector. <sup>18</sup> Between 2014-15, there was a slight net decline in the number of businesses (-1.4%). In 2015, 43.4% of businesses were non-employing and 42.6% employed between 1-19 people. <sup>19</sup> Major operators include SIS Australia Holdings Pty Ltd, Linfox Pty Ltd, and Wilson   |

<sup>17</sup> Commonwealth Department of Employment (Labour Market Information Portal): Educational Attainment by Industry Sector (2014).

<sup>18</sup> Australian Bureau of Statistics: 81650 Counts of Australian Businesses, including Entries and Exits, June 2011- June 2015.

<sup>19</sup> Ibid.

|   |   |
|---|---|
|   | Parking Australia 1992 Pty Ltd. <sup>20</sup> While the majority of companies are Australian-owned, there are several major foreign companies operating in Australia. The level of globalisation is projected to increase in future years, with the expansion of existing foreign operators. <sup>21</sup>  |
| <b>Peak bodies</b>                            | Australian Security Industry Association, Security Providers Association of Australia Ltd, Building Service Contractors Association of Australia, Facility Management Association of Australia, International Association of Healthcare, Security and Safety, Real Estate Institute of Australia, Strata Community Australia, Professionals Australia, Fire Protection Association of Australia, National Fire Industry Association and United Voice.   |
| <b>Applicable licensing</b>                   | Licencing applies in all states and territories for investigation and security. Licencing requirements differ considerably between the states and territories.  |
| <b>Challenges and opportunities</b>           | <ul style="list-style-type: none"> <li>Differing regulations in states and territories has lead people to cross interstate into jurisdictions where they can attain a security licence that can be granted by meeting fewer requirements: note, these licences are valid Australia-wide.<sup>22</sup></li> <li>The introduction of technological advancements to the industry has created a need to ensure that employees are able to operate emerging technologies efficiently and ethically.</li> <li>Technological advancements are reducing the heavy reliance on physical labour, which is being substituted, for example, through the use of computerised central alarm and security camera monitoring systems.<sup>23</sup></li> <li>Industry and key stakeholders have identified biometrics as an important skill area in the future.</li> </ul> |
| <b>Fire Protection Inspection and Testing</b> |   |
| <b>Description</b>                            | This sector includes fire and security alarm installation services, as well as other functions such as emergency management, fire safety auditing and bushfire protection.  |
| <b>Qualifications</b>                         | CPP20511 Certificate II in Fire Protection Inspection and Testing<br>CPP30811 Certificate III in Fire Protection Inspection and Testing   |
| <b>Analysis of businesses</b>                 | As of 2015, there were 3,168 businesses operating in this subsector. <sup>24</sup> Between 2014-15 there was a slight net growth in the number of businesses (1.3%). As of 2015, 44% of businesses were non-employing and 53% employed between 1-19 people. <sup>25</sup> This sector has a medium level of globalisation, due to both major operators being foreign owned (UTS Australia Commercial Holdings Pty Ltd and Wormald & ADT Australia Pty Ltd). <sup>26</sup> Most businesses, however, are Australian owned and operate domestically.  |

<sup>20</sup> IBISWorld: Industry Report on Investigation and Security Services in Australia (2015).

<sup>21</sup> Ibid.

<sup>22</sup> See: Australian Skills Quality Authority: Training in security programs in Australia (2016).

<sup>23</sup> IBISWorld: Industry Report on Investigation and Security Services in Australia (2015).

<sup>24</sup> Australian Bureau of Statistics: 81650 Counts of Australian Businesses, including Entries and Exits, June 2011- June 2015.

<sup>25</sup> Ibid.

<sup>26</sup> Ibis World Specialised Industry Report on Fire Protection Services in Australia (2016).

|                                     |  |
|-------------------------------------|--|
| <b>Peak bodies</b>                  | National Fire Industry Association, Fire Protection Association of Australia, Master Plumbers and Mechanical Services Association of Australia, Communication, Electrical and Plumbing Division, Construction, Forestry, Mining and Energy Union, Australian Workers Union and the Australian Manufacturing Union.   |
| <b>Applicable licensing</b>         | <ul style="list-style-type: none"> <li>• No legislative requirements apply</li> <li>• National accreditation schemes exist</li> </ul>  |
| <b>Challenges and opportunities</b> | <ul style="list-style-type: none"> <li>• The regulatory environment has tightened with regard to building codes relating to fire detection and prevention equipment.<sup>27</sup></li> <li>• The industry comprises of a large number of smaller operators that are geographically dispersed throughout Australia.</li> <li>• Modest growth in employment is predicted in this industry from 2016-21 (1.6%).<sup>28</sup></li> <li>• Technological advancements are associated with digitalisation, for example, fire detection software and automated alarm systems.</li> </ul> |

### Swimming Pool and Spa Servicing

|                                     |  |
|-------------------------------------|--|
| <b>Description</b>                  | This sector relevantly includes the swimming pool and spa serviced.  |
| <b>Qualifications</b>               | CPP31212 Certificate III in Swimming Pool and Spa Service<br>CPP41312 Certificate IV in Swimming Pool and Spa Service  |
| <b>Analysis of businesses</b>       | ABS, governmental or privately produced data is not specifically available for this sector.  |
| <b>Peak bodies</b>                  | Swimming Pool and Spa Association of Australia Ltd, Professionals Australia, and United Voice  |
| <b>Applicable licensing</b>         | Licences may be required in Queensland and South Australia depending on the scope and cost of the work.  |
| <b>Challenges and opportunities</b> | <ul style="list-style-type: none"> <li>• Employees must be up to date with relevant regulations, including fencing and environmental standards.</li> <li>• There is a need for industry employees to become formally qualified, due to past proliferation of unqualified industry employees and the health and safety implications of this.</li> </ul> |

### Facility Management

|                               |   |
|-------------------------------|---|
| <b>Description</b>            | This sector involves the management, operation and maintenance of built environments.   |
| <b>Qualifications</b>         | CPP50511 Diploma of Property Services (Asset and Facility Management)<br>CPP60211 Advanced Diploma of Property Services (Asset and Facility Management)   |
| <b>Analysis of businesses</b> | Approximately 40% of businesses in this sector operate nationally, 36% operate globally. <sup>29</sup> Practitioner portfolios are shrinking, with 45% of portfolios composed by five buildings or less. <sup>30</sup> There is a trend in the sector |

<sup>27</sup> Ibid.

<sup>28</sup> Ibid.

<sup>29</sup> Facility Management Australia, Facilities Management Industry Census: Trends and Insights (2014-15).

<sup>30</sup> Ibid.

|                                     |  |
|-------------------------------------|--|
|                                     | towards a younger and more gender-balanced profession, although women still only make up 25% of the overall workforce. <sup>31</sup>   |
| <b>Peak bodies</b>                  | Facility Management Association of Australia   |
| <b>Applicable licencing</b>         | Facility management is not a licenced occupation, however, state and territory regulations may affect how buildings are managed and operated.  |
| <b>Challenges and opportunities</b> | <ul style="list-style-type: none"> <li>The challenges of this sector include, improving and maintaining health and safety standards, increasing energy efficiency and improving FM service standards.<sup>32</sup></li> <li>Currently there are issues in this sector in attracting and retaining appropriately skilled staff and encouraging social cohesion.<sup>33</sup></li> </ul> |
| <b>Strata Management</b>            |  |
| <b>Description</b>                  | This sector involves the management and administration of owner corporations. Strata managers ensure buildings and common areas within strata schemes are properly maintained.   |
| <b>Qualifications</b>               | CPP30416 Certificate III in Strata Community Management<br>CPP40516 Certificate IV in Strata Community Management<br>CPP50316 Diploma of Strata Community Management   |
| <b>Analysis of businesses</b>       | It is estimated that there are approximately 270,000 owner corporations comprising of 2,00,000 lots Australia wide. <sup>34</sup> Strata management mainly occurs at a national level, with low levels of globalisation.   |
| <b>Peak bodies</b>                  | Strata Community Australia Ltd   |
| <b>Applicable licencing</b>         | Licencing applies in NSW and the NT. Registration is required in the ACT and Victoria.   |
| <b>Challenges and opportunities</b> | <ul style="list-style-type: none"> <li>Developments in 3D technologies are predicted to support the land market, decrease delays and reduce costs.<sup>35</sup></li> <li>A key challenge for this sector is the regulatory framework, as there are different laws in each state and territory to comply with.</li> </ul>   |
| <b>Access Consulting</b>            |  |
| <b>Description</b>                  | This sector relates to the consultation services regarding accessible environments. Services include accessibility reports, audits, design, research and advice on the best practices.   |
| <b>Qualifications</b>               | CPP40811 Certificate IV in Access Consulting<br>CPP50711 Diploma of Access Consulting<br>CPP80313 Graduate Diploma of Access Consulting  |
| <b>Analysis of businesses</b>       | This industry consists primarily of sole-traders (approximately 90%). The work performed in this profession directly affects the welfare of over 2,000,000 Australians. <sup>36</sup> There are approximately 400 access consultants   |

<sup>31</sup> Ibid.

<sup>32</sup> Ibid.

<sup>33</sup> Ibid.

<sup>34</sup> Strata Community Australia: <https://www.stratacommunity.org.au/understandingstrata/what-is-strata> (2016).

<sup>35</sup> Strata Community Australia (Vic):

[http://www.vic.stratacommunity.org.au/OCV2/Resources/Research\\_Industry\\_Information/OCV2/Resources/Research\\_Industry\\_Information.aspx?hkey=cbc7ce05-826d-450c-9a8e-265ae8259666](http://www.vic.stratacommunity.org.au/OCV2/Resources/Research_Industry_Information/OCV2/Resources/Research_Industry_Information.aspx?hkey=cbc7ce05-826d-450c-9a8e-265ae8259666) (viewed April 2016).

<sup>36</sup> Association of Consultants in Access <https://www.access.asn.au/> (2016).

|                                     |  |
|-------------------------------------|--|
|                                     | operating in Australia. <sup>37</sup> There are no major operators although some architectural and surveying firms employ access consultants. The sector primarily operates nationally.  |
| <b>Peak bodies</b>                  | Association of Consultants in Access Australia, Australian Institute of Building Surveyors, Royal Institute of Chartered Surveyors Australia   |
| <b>Applicable licencing</b>         | <ul style="list-style-type: none"> <li>• Licencing does not apply to this profession.</li> <li>• Consultants must be aware of relevant standards, regulations and codes.</li> </ul>  |
| <b>Challenges and opportunities</b> | <ul style="list-style-type: none"> <li>• Key challenges for the access consulting sector stem from society's lack of awareness or concern regarding the critical nature of environmental access for people with disabilities to engage with their community.<sup>38</sup></li> <li>• The industry consists primarily of sole-traders, which accentuates the importance of networking and continuous profession development (CPD) to maintain skills and knowledge.<sup>39</sup></li> </ul> |

## Employment

This section evaluates the employment growth of the property services industry in Australia, examining the aggregate growth of the industry over a period of time and the sectors and occupations which are experiencing higher than average growth rates.

### Industry Analysis (ANZSIC)

The sectors in this industry have experienced both periods of growth and decline over the last four years. The cleaning and pest control services have remained fairly stagnant and employment levels in 2015 were slightly lower than they were in 2011. Some growth, however, is expected in this sector nationally by 2019.<sup>40</sup> The waste sector has experienced a more consistent growth in employment, with employment levels rising from 29,300 to 35,400 people between 2011-2015. Employment levels are now predicted to decline and this sector is estimated to employ 32,300 people by 2019. The property operator and real estate sector employed 161,100 as of 2015, which is an increase from 146,600 in 2011. This sector is predicted to enter a period of significant growth by 2019. In the area of architectural, engineering and technical Services, there has been an irregular pattern of growth, including a dip in numbers in 2014 and a spike in 2015, to a height of 310,000 people. Finally, the public order and safety sector has experienced periods of growth and

<sup>37</sup> Ibid.

<sup>38</sup> Ibid.

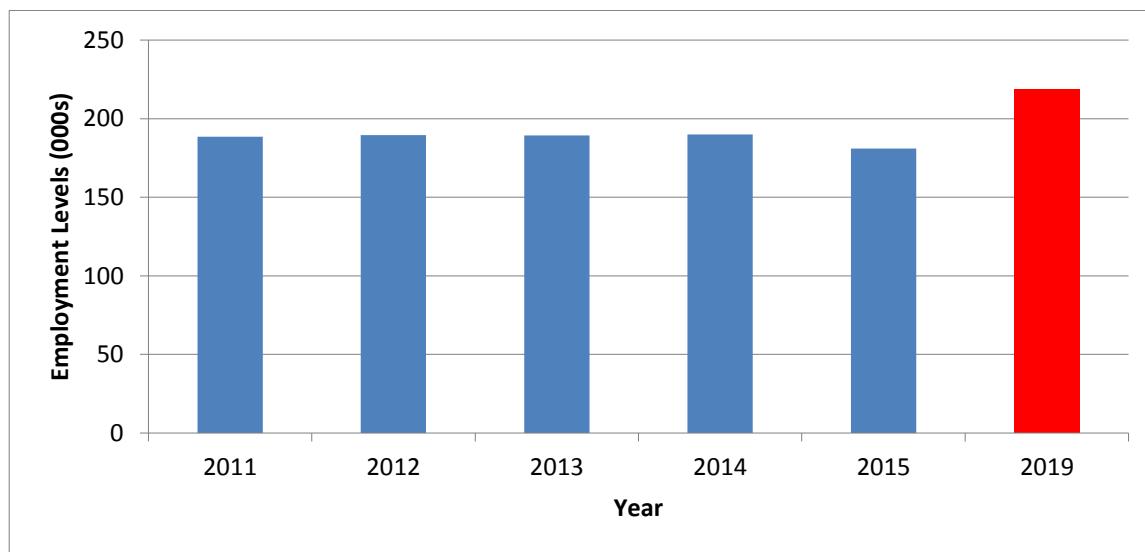
<sup>39</sup> Ibid.

<sup>40</sup> The industry has advised that this is not the case in Western Australia.

decline over the last 5 years, however, employment levels are predicted to increase from 186,900 people in 2015 to 208,600 people by 2019.

Based on this data, there will be an increased need for skills in cleaning and pest control services,<sup>41</sup> property operators and real estate services, public order and safety services. Occupational data is available in the following section.

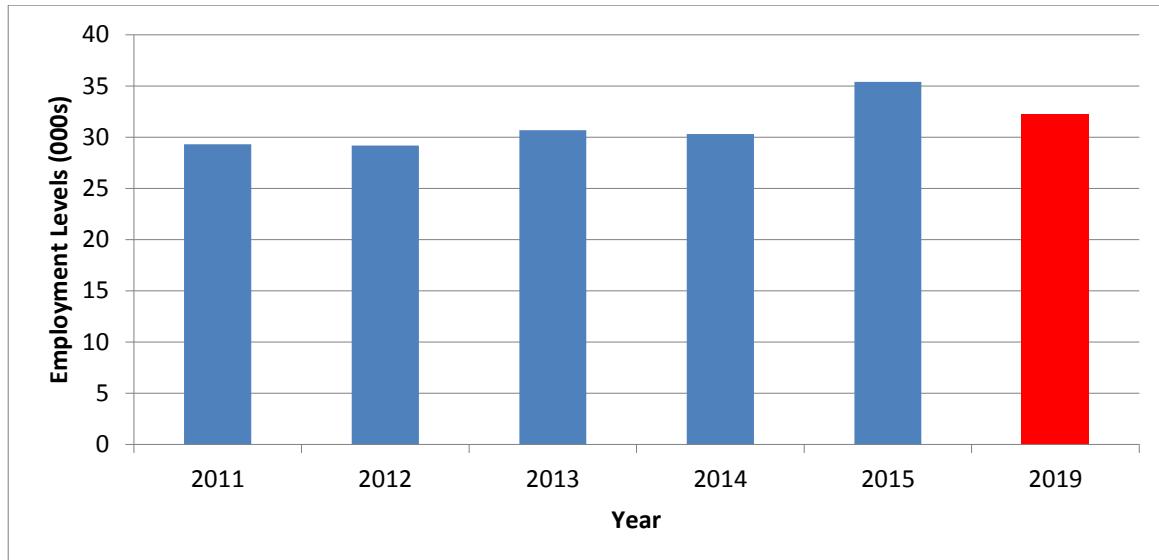
**Graph 1: Building Cleaning, Pest Control and Gardening Services – Employment Levels (000)<sup>42</sup>**



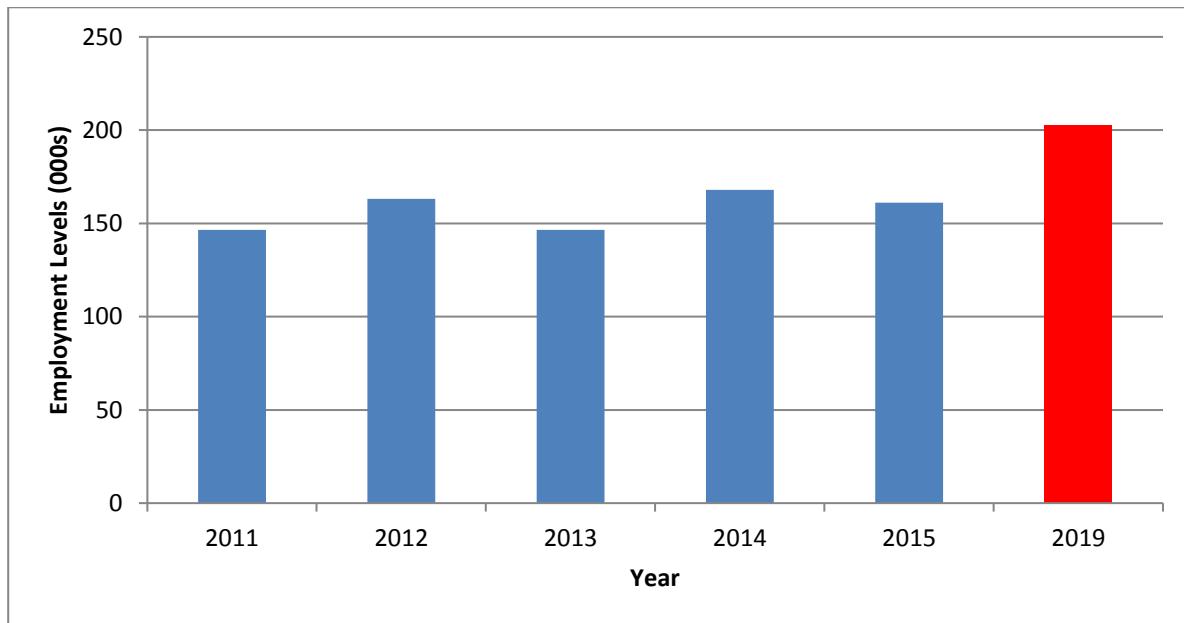
<sup>41</sup> It should be noted that a decline is forecast for commercial cleaners, as a subset of the broader category of Building Cleaning, Pest Control and Gardening Services.

<sup>42</sup> Department of Employment Labour Market Information Portal. Note: Figures are displayed at the ANZSIC Division 731 level. The graph includes current and historical employment levels, as well as a projected employment level by 2019.

**Graph 2: Waste Collection, Treatment and Disposal Services – Employment Levels (000s)<sup>43</sup>**



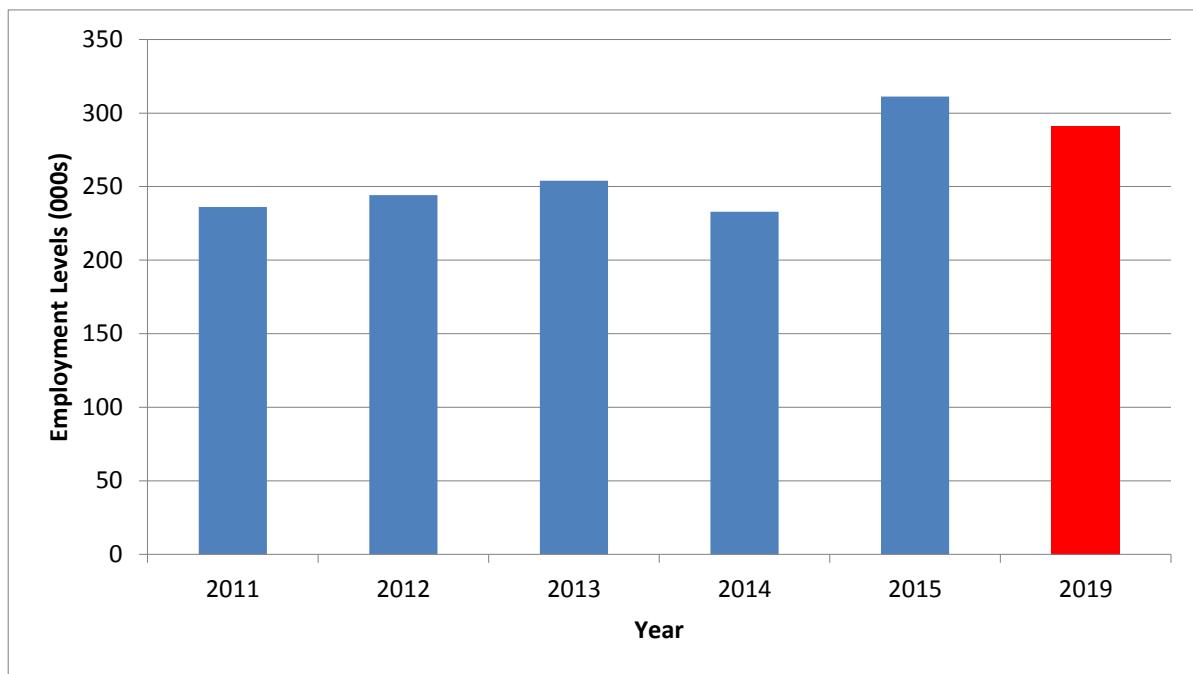
**Graph 3: Property Operators and Real Estate Services – Employment Levels (000s)<sup>44</sup>**



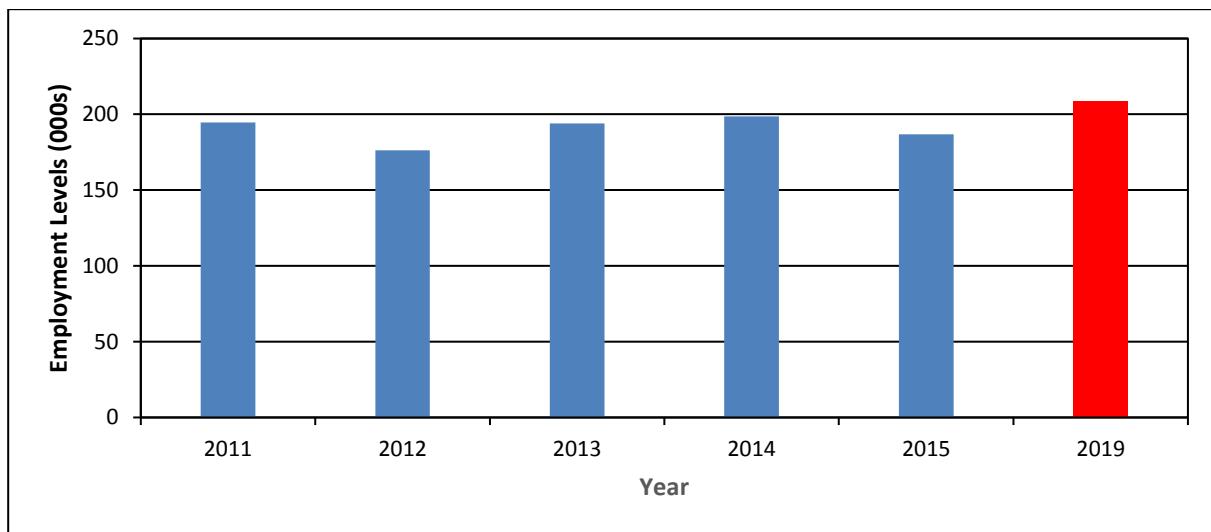
<sup>43</sup> Department of Employment Labour Market Information Portal. Note: Figures are displayed at the ANZSIC Division 29 level. The graph includes current and historical employment levels, as well as a projected employment level by 2019.

<sup>44</sup> Department of Employment Labour Market Information Portal. Note: Figures are displayed at the ANZSIC Division 67 level. The graph includes current and historical employment levels, as well as a projected employment level by 2019.

**Graph 4: Architectural, Engineering and Technical Services – Employment Levels (000s)<sup>45</sup>**



**Graph 5: Public Order and Safety Services<sup>46</sup>**



<sup>45</sup> Department of Employment Labour Market Information Portal. Note: Figures are displayed at the ANZSIC Division 692 level. The graph includes current and historical employment levels, as well as a projected employment level by 2019.

<sup>46</sup> Department of Employment Labour Market Information Portal. Note: Figures are displayed at the ANZSIC Division 771 level. The graph includes current and historical employment levels, as well as a projected employment level by 2019.

## Occupational level (ANZSCO)

Within the property services industry, employment rates are expected to increase over the next three years in selected occupations. The graphs below (graphs 6 – 9), detail the major employing occupations in the industry, including other farm, forestry and garden workers, architectural specialist, building and surveying technicians, real estate agents, office managers, commercial cleaners, contract, program and project administrators and information officers.

In summary, growth is predicted in the following key occupations:

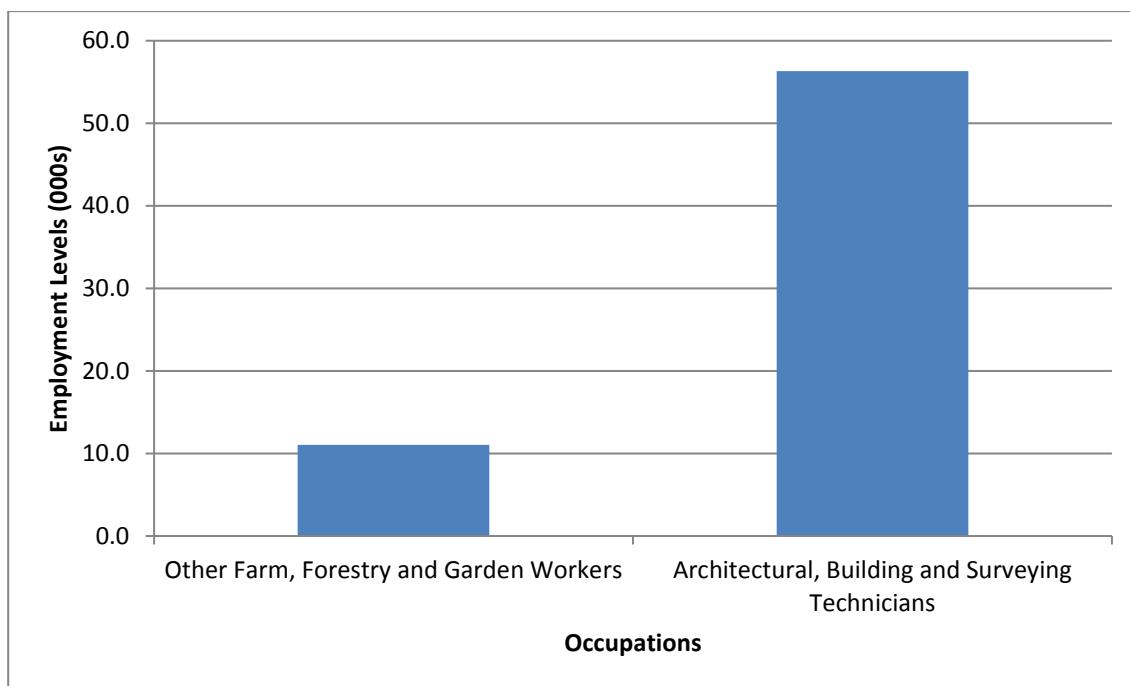
- Other farm, forestry and garden workers;
- Architectural, building and surveying technicians;
- Real estate agents;
- Office managers;
- Information officers; and
- Contract, program and project administrators.

Decline is predicted in the following occupation:

- Commercial cleaners.

The tables that follow the occupational graphs contain more data concerning additional occupations within this industry and their expected occupational growth by 2019. More recently defined occupations in this industry, such as strata managers, currently do not have an ANZSCO code and, are therefore, not represented in the tables. For more information regarding the growth in these sectors, please refer to the sector analysis above.

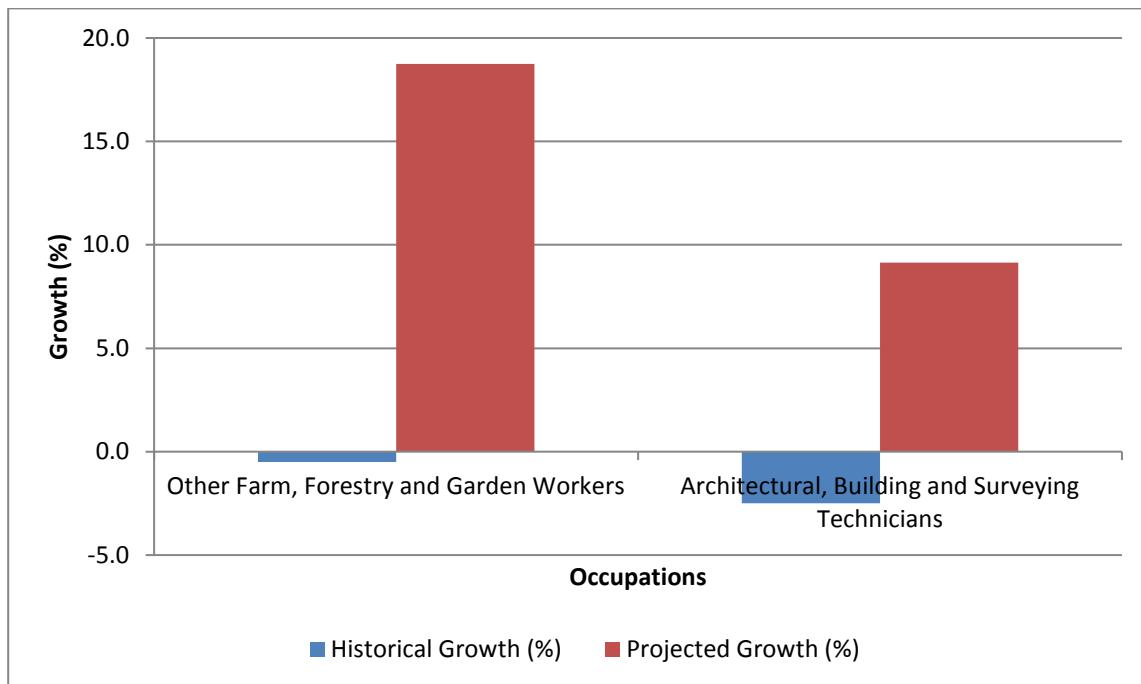
**Graph 6: Key Occupations for CPP – Employment Levels (000s)<sup>47</sup>**



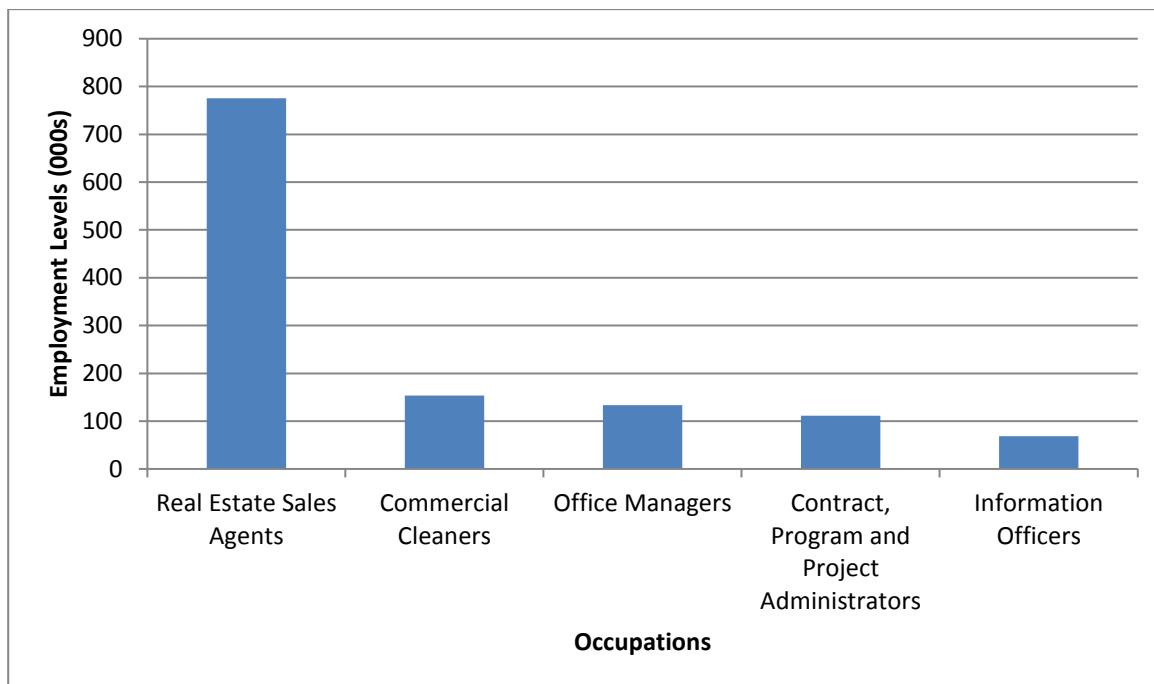
**Graph 7: CPP Occupations – Historical and Projected Growth (%)<sup>48</sup>**

<sup>47</sup> Australian Bureau of Statistics (ABS). Note: Occupations are at the four digit ANZSCO code. Employment levels are the five-year annual average to 2015. Figures include all employed in the occupation across the economy, not just the relevant industry.

<sup>48</sup> Historical employment growth from the Australian Bureau of Statistics (ABS) and projected employment growth from the Department of Employment. Note: Occupations are at the four-digit ANZSCO code. The historical employment is the five-year growth rate by 2015 and the projected employment growth rate is the expected growth rate by 2019. Rates are based on figures that include all those employed.

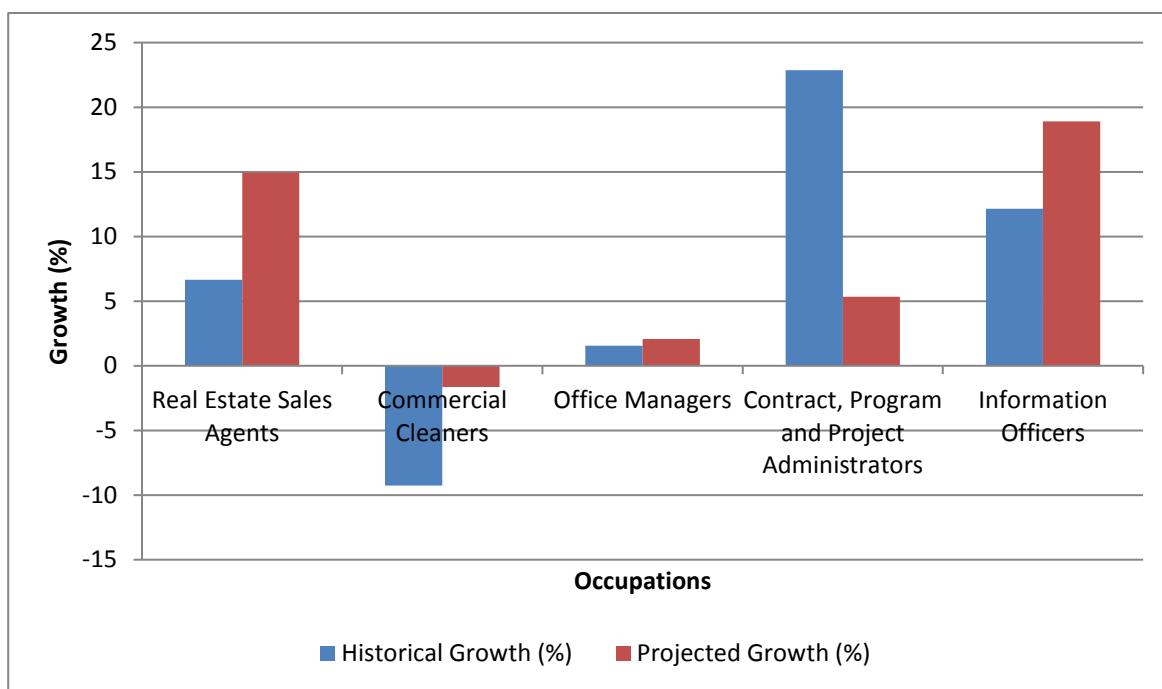


**Graph 8: Key Occupations for CPP07 – Employment Levels (000s)<sup>49</sup>**



<sup>49</sup> Australian Bureau of Statistics (ABS). Note: Occupations are at the four-digit ANZSCO code. Employment levels are the five-year annual average to 2015. Figures include all employed in the occupation across the economy, not just the relevant industry.

**Graph 9: Key Occupations CPP07 – Historical and Projected Growth (%)<sup>50</sup>**



<sup>50</sup> Historical employment growth from the Australian Bureau of Statistics (ABS) and projected employment growth from the Department of Employment. Note: Occupations are at the four-digit ANZSCO code. The historical employment is the five-year growth rate by 2015 and the projected employment growth rate is the expected growth rate by 2019. Rates are based on figures that include all employed.

**Table 2:**

| <b>Property Industry Occupational Data- Additional Occupations</b> |  |     |
|--|--|-----|
| Key Occupational Growth in the 5 years to 2019 (%)                 |  |     |
| 6121   | Real Estate Sales Agents                           | 15  |
| 8112   | Commercial Cleaners                                | -2  |
| 5121   | Office Managers                                    | 2   |
| 5111   | Contract, Program and Project Administrators       | 5   |
| 5412   | Information Officers                               | 18  |
| 4422   | Security Officers and Guards                       | 20  |
| 3121   | Architectural, Building and Surveying Technicians  | 9   |
| 8996   | Recycling and Rubbish Collectors                   | -17 |
| 1499   | Other Hospitality, Retail and Service Managers     | 11  |
| 8999   | Other Miscellaneous Labourers                      | 16  |
| 3423   | Electronics Trades Workers                         | 4   |
| 3999   | Other Miscellaneous Technicians and Trades Workers | 13  |
| 8116   | Other Cleaners                                     | -7  |
| 6111   | Auctioneers and Stock and Station Agents           | 7   |

**Table 3:**

| <b>Supply Side Challenges and Opportunities</b>          |   |
|--|---|
| Industry Sector  | Challenges and Opportunities  |
| <b>Waste Collection, Treatment and Disposal Services</b> | <ul style="list-style-type: none"> <li>As of 2014, there were 264 people in training in this sector.<sup>51</sup></li> <li>The percentage of those employed after training (on average) was 80% as of 2014.<sup>52</sup></li> <li>In the five years from 2010-2014, there were no enrolments in the Diploma of Waste Management.<sup>53</sup></li> <li>Over 50% of employees in this sector have not completed formal training.<sup>54</sup></li> </ul> |

<sup>51</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).<sup>52</sup> Ibid.<sup>53</sup> Ibid.<sup>54</sup> Commonwealth Department of Employment (Labour Market Information Portal): Educational Attainment by Industry Sector (2014).

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## Supply Side Challenges and Opportunities

| Industry Sector   | Challenges and Opportunities  |
|---|---|
| <b>Property Operators and Real Estate Services</b>            | <ul style="list-style-type: none"> <li>As of 2014, there were 22,547 students in training.<sup>55</sup></li> <li>On average, 77% of students are employed following training.<sup>56</sup></li> <li>Strict licencing requirements limit the ability of individuals to move to related occupations within the sector.</li> <li>Generally, there is a steady supply of workers into the industry and no significant issues with attrition.</li> </ul>   |
| <b>Architectural, Engineering and Technical Services</b>      | <ul style="list-style-type: none"> <li>As of 2014, there were 6,088 people enrolled in CPP or CPP07 qualifications.<sup>57</sup></li> <li>Employees are most likely to hold a Bachelor Degree (38%).<sup>58</sup> This means articulation between VET and the Tertiary sector is particularly important in this sector.</li> <li>According to the Department of Employment Skills Shortage List, there are currently skills shortages for surveyors and quantity surveyors.</li> </ul>  |
| <b>Building Cleaning, Pest Control and Gardening Services</b> | <ul style="list-style-type: none"> <li>As of 2014, there were 7,799 people enrolled in training in CPP07 qualifications. Approximately 73% of students are employed after training in this sector.<sup>59</sup></li> <li>A major source of students and employees in the cleaning sector are migrants and international students. LLN and WHS are an important focus because of the differing language and cultural standards in this subsector.</li> <li>Approximately 62% of the workforce does not have formal qualifications, due partially to a lack of regulatory requirements in the cleaning sector.<sup>60</sup></li> <li>Due to the relaxed regulatory environment, there are few entry barriers into the cleaning industry, leading to varying standards.</li> </ul> |
| <b>Public Order and Safety</b>                                | <ul style="list-style-type: none"> <li>While there is a large number of people undertaking training in this sector (25,879 as of 2014), the employment rate after training is only 55%.<sup>61</sup></li> <li>Due to the high number of migrants and underqualified workers employed in this sector, LLN and customer service deficiencies are an area of concern for industry and stakeholders.</li> <li>An inconsistent licensing arrangement has resulted in people crossing interstate borders to attain licences in jurisdictions with fewer requirements.<sup>62</sup></li> </ul>   |

<sup>55</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).

<sup>56</sup> Ibid.

<sup>57</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).

<sup>58</sup> Commonwealth Department of Employment (Labour Market Information Portal): Educational Attainment by Industry Sector (2014).

<sup>59</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).

<sup>60</sup> Commonwealth Department of Employment (Labour Market Information Portal): Educational Attainment by Industry Sector (2014).

<sup>61</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).

<sup>62</sup> Australian Skills Quality Authority: Training in security programs in Australia (2016).

| Supply Side Challenges and Opportunities      |  |
|---|--|
| Industry Sector                               | Challenges and Opportunities   |
| <b>Swimming Pool and Spa Servicing</b>        | <ul style="list-style-type: none"> <li>As of 2014, there were approximately 425 people enrolled in swimming pool and spa servicing qualifications.<sup>63</sup></li> <li>The lack of uptake of training in this area has been identified as a challenge for the industry.</li> </ul>   |
| <b>Fire Protection Inspection and Testing</b> | <ul style="list-style-type: none"> <li>As of 2014, there were approximately 2,477 people enrolled in fire protection qualifications.<sup>64</sup></li> <li>The lack of uptake of training in this area has been identified as a challenge for the industry.</li> </ul>   |
| <b>Facility Management</b>                    | <ul style="list-style-type: none"> <li>The highest rated weakness for this sector in the Facility Management Industry Census is attracting and retaining appropriately skilled staff.<sup>65</sup></li> <li>As of 2014, there were 91 people enrolled in facility management qualifications. There were no enrolments in the Advanced Diploma.<sup>66</sup></li> </ul>   |
| <b>Strata Management</b>                      | <ul style="list-style-type: none"> <li>A key priority skill for the strata sector is customer service and client-based skills.</li> <li>There is currently no data available on the number of people in training, as the strata management qualifications were only endorsed as of 2016.</li> </ul>  |
| <b>Access Consulting</b>                      | <ul style="list-style-type: none"> <li>Attrition is very low. Access consulting is not a physically strenuous profession; therefore, people stay in the industry until they retire from the workforce. The low attrition rate does not yet impact on training requirements because the profession is still growing.<sup>67</sup></li> <li>As of 2014, there were approximately 60 people enrolled in access consulting qualifications.<sup>68</sup></li> </ul> |

## Skills Outlook

### Emerging Trends: Technology

The following chart contains the results of Artibus Innovation's industry and stakeholder survey regarding emerging technology and changing skills needs. On average, across all stakeholder groups, 50% of the respondents indicated that they were aware of emerging technologies (e.g.

<sup>63</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).

<sup>64</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).

<sup>65</sup> Facility Management Australia: Facility Management Industry Census (2014-15).

<sup>66</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15).

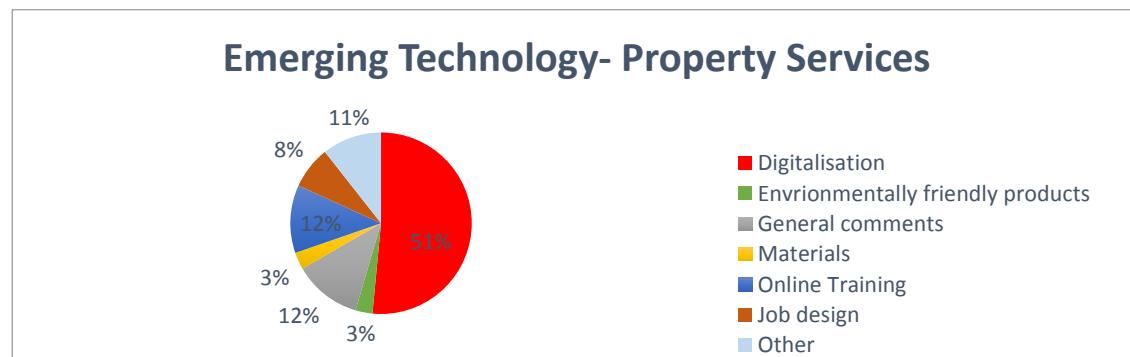
<sup>67</sup> Association of Consultants in Access Australia: <https://www.access.asn.au/> (2016).

<sup>68</sup> National Centre for Vocational Education Research: Data Collection on VET Students by Industry (2014-15). This data is not reliable or available over the longer-term, as some access consulting courses are not currently recorded as government funded (and therefore data collection is limited).

digitalisation of labour) that are impacting training and the industry needs. Another 27% of the respondents stated that they were unsure of the effects of technology on the industry.

As can be seen in the chart below, 51% of positive answers indicated that technological changes in this industry are occurring in the form of digitalisation. Based on this information, important emerging skill needs in this industry are digital awareness and the ability to operate digital technology.

Pie Chart 1: Emerging Technological Assessment



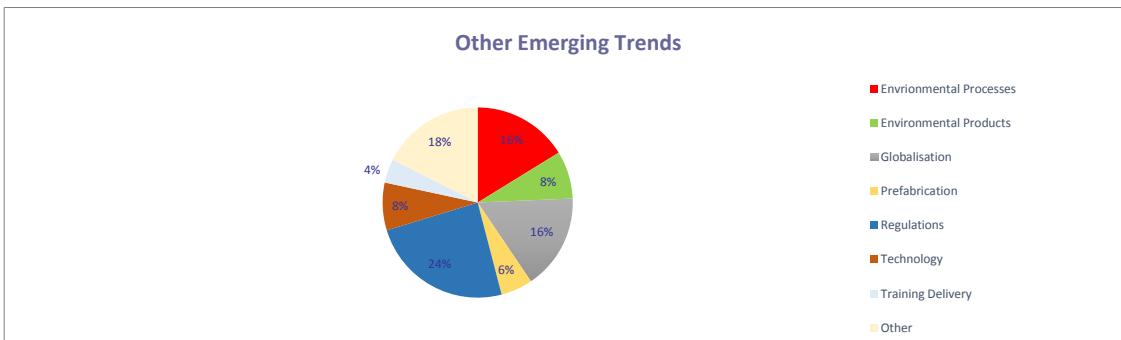
Broadly, the survey feedback indicated that business operations are being significantly impacted by digitalisation. Advancements in telecommunications and internal resource management have, for example, reduced cost and improved efficiency in the workplace. Most businesses now have a web presence and many use digital platforms for accounting, form filling, resource management, job allocation, planning and marketing. In addition, technology such as Business Information Modelling (BIM) is being used in this industry, which is predicted to significantly impact several industry sectors. Specific information regarding these changes is available at a sectoral level in Table 11.

## Other Emerging Trends

Survey respondents were also asked to comment on other trends in the industry. Approximately 34% of the respondents identified other trends that are impacting the industry and training packages. To this end, 24% of the participants stated that the regulatory environment and the increasing level of regulation is an important factor to consider when developing and refining the training packages. Environmentally sustainable processes and products were also identified as

key considerations. Globalisation and the internationalisation of business are also mentioned by 16% of survey respondents who addressed this question.

Pie Chart 2: Emerging Trends



The specifics of these responses are provided in the Sector Analysis section. At a broad level, tightening standards with regards to the environment and energy efficiency were a commonly cited trend, for example, energy rating systems such as green star and LEED. Participants also reported an industry and consumer driven trend towards more sustainable practices and products in all sectors within the property services industry e.g. reduced use of chemicals in cleaning, pest management, swimming pool and spa servicing. In addition, responsible waste management was mentioned as a focus across multiple sectors. In terms of globalisation, internationalisation of business, international investment, international standards and global competition were also mentioned in multiple sectors. Another concern from participants was the increasingly strict regulations and standards.

## Sector Analysis

| Sector   | Trends in job design, globalisation, digitalisation, and automation  |
|--|--|
| <b>Waste Collection, Treatment and Disposal Services</b> | In the waste collection sector, technological developments generally relate to vehicle improvements, for example, in fuel efficiency, the lifting and tipping of bins and the transportation of liquid waste. <sup>69</sup> These changes have not significantly impacted job design; although since the automation of lifting and tipping there has been a decrease in jobs in this area. Developments in the treatment and remediation subsectors relate to the treatment of organic material to produce biogas for electricity. <sup>70</sup> Alternative waste technology provides solutions for materials that would otherwise go to landfill and is predicted to be an important area for employment and growth in the future. The shift |

<sup>69</sup> IBISWorld Industry Reports on Solid Waste Collection Services, Other Waste Collection Services (2016).

<sup>70</sup> IBISWorld Industry Reports on Waste Treatment and Disposal Services, and Waste Remediation and Materials Recovery Services (2015-16). Commercial in confidence. © Artibus Innovation 2016

| Sector  | Trends in job design, globalisation, digitalisation, and automation   |
|---|---|
|   | towards recycling and reproducing waste in alternative forms will create important skills needs in the future.  |
| <b>Property Operators and Real Estate Services</b>            | Industry and stakeholders report the following new technologies: online property auctions, virtual viewings, online forms, digital marketing and the use of digital applications. Around 99% of real estate businesses now have a web presence. <sup>71</sup> Computer software has also significantly reduced the cost of providing property management services, making it less labour intensive <sup>72</sup> . New entrants must be able to use current technology and adapt when new products appear on the market. In terms of emerging environmental trends, property managers must understand sustainable house ratings and the requirements where asbestos is present within a property. In addition, globalisation has resulted in increased international interest in property and the internationalisation of real estate businesses.   |
| <b>Architectural, Engineering and Technical Services</b>      | Technological changes are occurring at a rapid rate within this sector. Industry and stakeholders report that emerging technologies include Unmanned Aerial Vehicles (UAVs) and aerial photography, hand-held global navigation satellite systems (GNSS), precision machine control systems, advanced total stations, scanners, database management, BIM and LiDAR. New entrants will be required to understand and operate these devices and systems in order to work effectively in the industry. Other emerging trends include environmental legislative changes, changing business structures in a competitive business environment and the growing demand for environmentally sustainable practices and products.  |
| <b>Building Cleaning, Pest Control and Gardening Services</b> | In the pest control subsector, the industry reports indicate that growth is occurring in the area of non-chemical treatment options (IPM) on a wider and deeper scale than it is currently reflected in the training package. Other technological advancements have occurred in marketing and presentation and 'Building Out Pests'. Consumers are increasingly demanding technological solutions, non-intrusive solutions and remote solutions. In-transit fumigations are a global concern and risk (e.g. from poor fumigation practices, seals, poor skills and knowledge of fumigation and poor venting procedures) and have the potential to result in illness and/or death. Future pest controllers will need knowledge regarding the impact on human health due to their practices, on the environment and food, prevention with minimal use of chemicals, on the focus on continual monitoring and the compliance training for licencing and WHS.<br>While technological change is less rapid in the cleaning sector, key advancements include automation and robotics in cleaning tools and machines. Sustainability is also a key focus for this sector and there is an increasing trend towards sustainable use of microfibre, reduced use of chemicals, and increased acknowledgment of the importance of |

<sup>71</sup> IBISWorld Industry Report on Real Estate Services (2016).

<sup>72</sup> Ibid.

| Sector   | Trends in job design, globalisation, digitalisation, and automation   |
|--|---|
|  | cleaning for health. Entrants will need to appreciate these factors and utilise sustainable and new practices in order to work effectively in this sector.  |
| <b>Public Order and Safety</b>                 | Technological advancements affecting this sector include biometrics, digital test device, apps/software, online insurance claims, cloud based dispatch systems, SOPs on smart devices, ID scanning, virtual reality systems, advanced GPS tracking systems, integrated alarm/CCTV/building management systems and online incident reporting. Many of these changes have reduced the heavy reliance on labour in this sector. Industry and key stakeholders report that computer skills are an increasingly important requirement for employment. Another important development in this sector is globalisation and the increased risk of terrorism. This has increased community expectations of what is required by the security industry, particularly in the areas of prevention and emergency response.   |
| <b>Swimming Pool and Spa Servicing</b>         | Emerging trends in this sector include energy saving products and requirements, non-chlorine pools, mineral pools, water saving products and techniques, new equipment used in servicing and new surfaces. These changes are not predicted to significantly impact on job design.   |
| <b>Fire Protection, Inspection and Testing</b> | Research and development is continuous in areas of new fire detection, alarm and suppression systems. <sup>73</sup> These systems aim to provide integrated concepts and solutions in areas such as climate control, energy management, work processes and layout of client operations. Digital advancements have also occurred in surveillance, communication and relaying systems. Remote fire detection software and automated alarm systems have also been developed, although many of these advancements occur in manufacturing markets and are utilised primarily in the fire protection sector. <sup>74</sup> There is also a strong focus on prevention of ozone depleting substances and greenhouse gas emissions. Entrants into the industry must be technologically and environmentally aware, as well as adaptable to changes in equipment and processes. |
| <b>Facility Management</b>                     | Technology and digitalisation have affected this sector in two areas: service delivery and internal resource management. <sup>75</sup> Computer diagnostics on internal equipment has allowed for more accurate and faster maintenance. Telecommunications and automation allow for remote access to operating controls for security systems. These developments have resulted in improved efficiency, however, they have not significantly changed job design. Industry participants view technology as an opportunity to better improve service delivery.   |
| <b>Strata Management</b>                       | A key area of development in this sector is in 3D technologies. The use of 3D technologies will support the land market, streamline legal requirements, decrease delays and reduce costs for designing,   |

<sup>73</sup> IBISWorld Specialised Industry Report on Fire Protection Services in Australia (2016).

<sup>74</sup> Ibid.

<sup>75</sup> Facility Management Association: Facilities Management Industry Census (2014-15).

| Sector                   | Trends in job design, globalisation, digitalisation, and automation  |
|--------------------------|--|
|                          | planning, building and managing modern cities. <sup>76</sup> Online service delivery is another important development, with major strata management companies creating digitalised strata management services through websites and apps. According to Prudential Investment Company of Australia, cloud-based solutions will become fundamental to strata management in the future. <sup>77</sup> Remote asset monitoring sensor technology is also being developed, which will inform strata management of building problems without a manual inspection. |
| <b>Access Consulting</b> | This sector is closely related to surveying and architecture, therefore any important technological developments in those sectors will also affect access consulting. In addition, technological advancements in the area of telecommunications and internal resource management continue to improve efficiency in workplace operations.   |

| Five most important skills for the next 3-5 years |   |  |
|---|---|--|
| Number  | Skill   | Rationale  |
| 1   | Real Estate – Digitalisation of business services   | Real Estate is a service industry and the introduction of technology has revolutionised the way in which those services are delivered. The digitalisation of business services in this sector can be seen in all stages of the business process, from communications and online marketing (advertising, online listings), through the use of computer applications, to the sales process (online auctions), as well as in key business areas such as contract and financial management. Real estate firms are also using innovations in technology to set themselves apart from competitors (e.g. in the use of virtual tours and information-delivery devices). The heavy focus on customer service delivery through technology requires skills across each of these technological platforms. |
| 2   | Architectural, Engineering and Technical Services – Digitalisation of business processes in | In the architectural, engineering and technical services sector, digitalisation of business processes has become increasingly common, principally achieved through the use of Building Information Modelling (BIM). Current BIM software is used by individuals, businesses and government agencies, who plan, design, construct, operate and maintain diverse physical infrastructures (e.g. water, electricity, gas, roads, bridges, ports, houses, factories). Much of the  |

<sup>76</sup> Strata Community Australia (Vic):

[http://www.vic.stratacommunity.org.au/OCV2/Resources/Research\\_Industry\\_Information/OCV2/Resources/Research\\_Industry\\_Information.aspx?hkey=cbc7ce05-826d-450c-9a8e-265ae8259666](http://www.vic.stratacommunity.org.au/OCV2/Resources/Research_Industry_Information/OCV2/Resources/Research_Industry_Information.aspx?hkey=cbc7ce05-826d-450c-9a8e-265ae8259666) (viewed April 2016).

<sup>77</sup> Financial Review (6 July 2016) <http://www.afr.com/real-estate/pica-and-urbanise-digitalises-strata-management-20160706-gpzni3>.

|   |  |   |
|---|--|---|
|   | surveying,<br>spatial  | potential for BIM has yet to be realised in terms of promoting efficiency, reducing wasted effort, minimising disputes and facilitating collaboration between different parties working on the same project. The challenge for the next 3-5 years is to support workers in this sector in gaining skills in BIM, in conjunction with skills in technologies that support and enable BIM, such as mobile technology and augmented reality.   |
| 3 | Security - Skills to address new developments in the industry  | The security industry has seen significant changes in job design due to developments in technology and equipment, including environmental factors such as the rise of terrorist activity and associated security measures and new approaches to public safety. Ensuring that security staff are appropriately trained to address these new skill requirements is a priority, as well as addressing the need for security staff to be operating at consistent levels of skill across states and territories, in line with industry licensing.  |
| 4 | Pest Control and Cleaning - Understanding environmental and public health impacts                                | There is growing consumer demand for cleaning and pest control solutions that have as little impact as possible on public health and the environment. In the pest control sector this necessitates a greater focus for industry workers on non-chemical treatments and products, supported by more in-depth knowledge of the impacts on public health, the environment and food chain, as well as individual workers' own WHS needs. Similarly, in the cleaning sector there is an increasing demand for the reduced use (or non-use) of chemical products, both in the commercial and domestic market. Understanding potential environmental impacts and applying this knowledge to a range of different situations will continue to be an important industry skill focus in the next 3-5 years.   |
| 5 | Fire Protection, Inspection and Testing – Upskilling existing workers in new technology, equipment and processes | The fire protection sector has seen steady advancements in technology, in areas ranging from integrated climate control solutions, energy management, work processes and layout of client operations, to surveillance, communication and relaying systems, remote fire detection software and automated alarm systems. There are significant numbers of students undertaking qualifications in this area – in 2014, almost 2,500 students enrolled in Fire Protection and Testing qualifications.<br>Existing and new industry entrants must be technologically and environmentally aware, as well as adaptable to changes in equipment and processes. The industry reports that the current Certificate III in Fire Protection is inadequate to requirements and requires urgent review to ensure that workers have the skill set required by the changes in the industry. |

The principal sources of information used in the compilation of this list include the whole-of-industry survey undertaken by Artibus Innovation in June 2016. Intelligence was also gathered from the Property Services Industry Committee and current industry reports for relevant sectors. For a more detailed account of the other sources of information used to inform the production of this work plan, please refer to the Methodology section and the Reference List.

| Ranking of 12 Generic Workforce Skills (1= Most Important) |   |
|--|---|
| Number   | Skill   |
| 1  | STEM  |
| 2  | LLN   |
| 3  | Technology  |
| 4  | Customer service / Marketing  |
| 5  | Environmental and Sustainability  |
| 6  | Managerial / Leadership   |
| 7  | Financial   |
| 8  | Entrepreneurial   |
| 9  | Design mindset / Thinking critically / System thinking / Solving problems       |
| 10   | Communication / Virtual collaboration / Social intelligence                     |
| 11   | Learning agility / Information literacy / Intellectual autonomy and self-manage |
| 12   | Data analysis   |

## Other Relevant Skills-Related Insights for This Sector

The development of the plan was guided by a strategic framework. The framework recognises the connected yet diverse stakeholders of the training package (TP) and establishes an evaluation measure to guide future work on the TP.

A range of consultation methods was undertaken and triangulated. The methods included:

- An extensive literature search;
- An online survey with over 170+ responses;
- One-on-one interviews and workshop (40+); and
- Collection of responses from an online forum.

Feedback from the stakeholders was gathered to determine the following aspects:

- Current performance level of the TP;
- Determine specific areas of TP that required further improvement;
- Determine topics of relevance that are important for the future of the industry and the training needs; and
- Identify key industry skill needs.

Artibus Innovation developed and applied a model for determining the Quality, Utility and Relevance of TPs. These measures were added to the analysis.

### **Current Performance Level of the Training Package (TP)**

This was identified through both Quality and Utility factors.

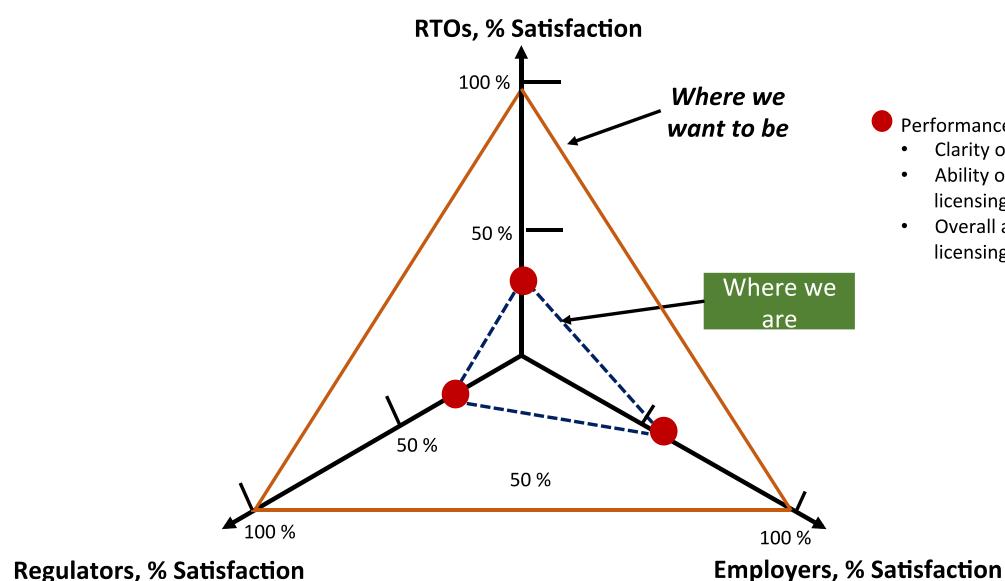
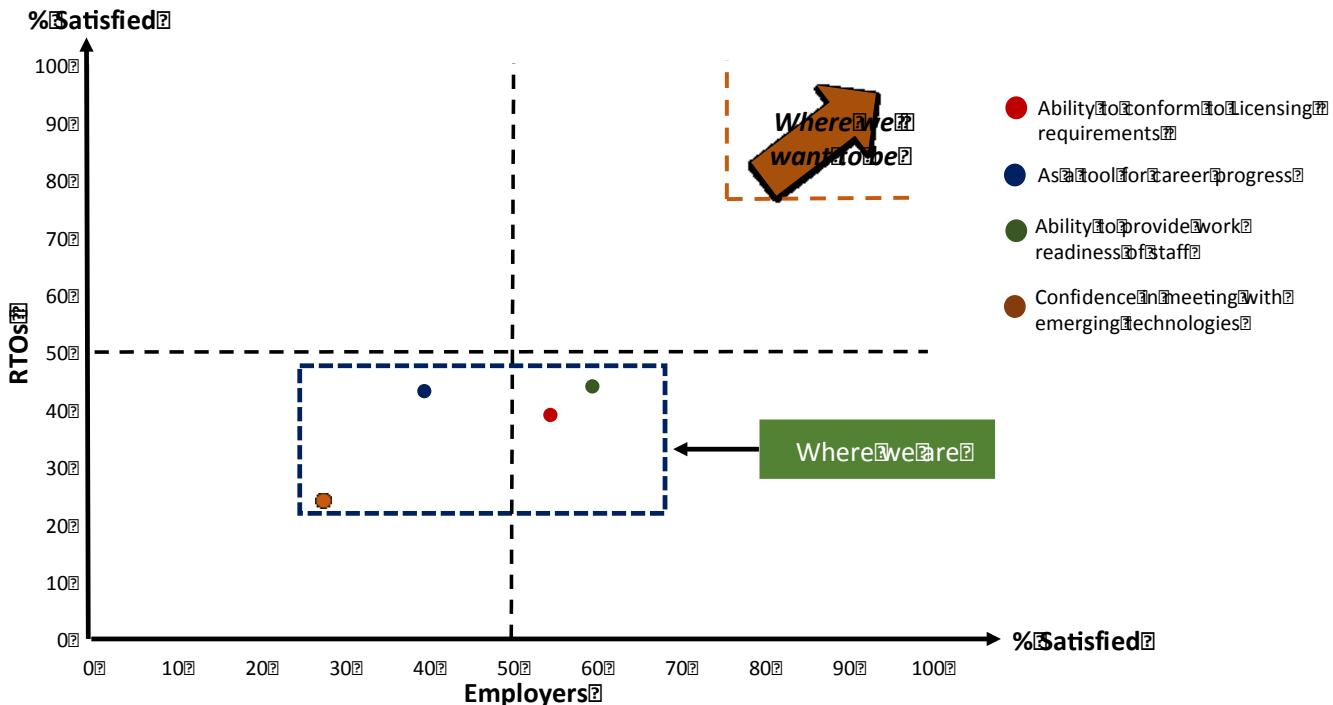
Quality is a measurement of the TP's success to deliver its intended function(s) and is determined by assessment across all the stakeholder groups. The measure was determined through the parameter of Customer Satisfaction.

Utility explains the degree of effectiveness of the TP across different stakeholder groups.

Table 1, Figures 1 and 2 represent the results of these analytical methods and provides a benchmark of “Where are we now?”

Table 1: Average Satisfaction Level Across Stakeholders

| User Group of TP | % Satisfaction level |
|------------------|----------------------|
| RTOs             | 33                   |
| Employers        | 46                   |
| Regulators       | 23                   |



### Looking into The Future

Macro trends such as technological advances and the adoption of environmentally sustainable practices require the industry and its occupational requirements to evolve. These trends were investigated through Topics of Relevance.

Across all stakeholders 42% acknowledged the impact of impending technologies, and 37% recognised the impact of other macro trends.

The following themes surfaced as most likely to affect the future of the property services industry:

- Building Information Modelling (BIM);
- Prefabrication;
- Digital processes; and
- Environmentally sustainable practices.

The following skills were identified as key future priorities for the industry:

- Real Estate – Skills relating to digitalisation of business services;
- Architectural, Engineering and Technical Services – Digitalisation of business processes in the surveying and spatial sectors;
- Security - Skills to address new developments in the industry;
- Pest Control and Cleaning - Understanding environmental and public health impacts; and
- Fire Protection, Inspection and Testing – Upskilling existing workers in new technology, equipment and processes.

### **Planning for the Future**

This analysis emphasises the need to consider the following aspects in the future design of the CPP Training Package:

1. The need to improve Quality aspects, e.g. clarity of language, assessment guidelines, licensing information, companion volumes and packaging rules;
2. The need to improve Utility aspects, e.g. workforce development and conformation with the regulatory framework; and
3. Timely incorporation of Topics of Relevance to TP content.

# Part Two- Proposed Plan

## Training Product Review Plan and Rationale

The first year of the four-year plan is shaded in grey. This work has been approved by the AISC and is already underway.

| Work to be undertaken  | Rationale   | Activity      |
|--|---|---------------|
| 2016-17  |   |               |
| CPP10107 Certificate I in Security Operations<br>CPP20212 Certificate II in Security Operations<br>CPP20307 Certificate II in Technical Security<br>CPP30411 Certificate III in Security Operations<br>CPP30507 Certificate III in Technical Security<br>CPP30607 Certificate III in Investigative Services<br>CPP40707 Certificate IV in Security and Risk Management<br>CPP50611 Diploma of Security and Risk Management | A review of the security qualifications is required to respond to the recent ASQA Strategic Review and to better align qualifications to the workforce.<br>Many of the security qualifications are overdue for review (the last review was undertaken 5 years ago) and will have to be updated to the 2012 Standards, which further supports prioritising these qualifications. It is recommended the work extend across all the security qualifications in the training package. | Business Case |
| CPP30211 Certificate III in Property Services (Agency)<br>CPP30311 Certificate III in Property Services (Operations)<br>CPP40307 Certificate IV in Property Services (Real Estate)<br>CPP40507 Certificate IV in Property Services (Business Broking)<br>CPP40407 Certificate IV in Property Services (Stock and Station Agency)<br>CPP40611 Certificate IV in Property Services (Operations)                              | These qualifications are overdue for review (5 years since last review) and have not been updated to the 2012 Standards. In addition, digital disruption is significant in this sector and has impacted skills needs and job design. This review will focus on the impact on skills requirements of rapid technological changes and digital disruption. This will involve examining the impact this is having on job design, the regulatory environment and the training package. | Business Case |

|   |  |   |
|---|--|---|
| CPP50307 Diploma of Property Services (Agency Management)<br>CPP50409 Diploma of Property Services (Business Broking)<br>CPP50511 Diploma of Property Services (Asset and Facility Management)<br>CPP60211 Advanced Diploma of Property Services (Asset and Facility Management)  |  |   |
| CPP20511 Certificate II in Fire Protection Inspection and Testing<br>CPP30811 Certificate III in Fire Protection Inspection and Testing   | This qualification is due for review this year - it has been four years since the last review. Industry also reports that this qualification is inadequate to the industry requirements and requires urgent review. This qualification also requires updating to the 2012 Standards. | Business Case                                     |
| CPP20611 Certificate II in Cleaning Operations  | This qualification is due for review, and has not been transitioned to the 2012 Standards. The primary purpose of this review will be to update the qualification to the standards.  | Case for Endorsement                              |
| CPP50711 Diploma of Access Consulting   | This qualification is due for review, and has not been transitioned to the 2012 Standards. The primary purpose of this review will be to update the qualification to the standards.  | Case for Endorsement                              |
| Review of qualifications included in the CPP version 6 Case for Endorsement, namely:<br>CPP20411 Certificate II in Waste Management<br>CPP30711 Certificate III in Waste Management<br>CPP31212 Certificate III in Swimming Pool and Spa Service<br>CPP40911 Certificate IV in Waste Management<br>CPP40811 Certificate IV in Access Consulting<br>CPP41312 Certificate IV in Swimming Pool and Spa Service<br>CPP50811 Diploma of Waste Management<br>CPP80313 Graduate Diploma of Access Consulting | Some work is still required to complete the CPP version 6 Case for Endorsement for these components. Some qualifications may require further work to be undertaken, leading to the development of additional business cases.   | Review and re-submission of Case for Endorsement. |
| CPP50911 Diploma of Building Design<br>CPP80113 Graduate Certificate in Building Design<br>CPP80213 Graduate Diploma of Building Design<br>CPP41110 Certificate IV in Home Sustainability Assessment  | Industry has indicated that there is further work to be undertaken in relation to these qualifications, and they have therefore been removed from the CPP version 6 Case for Endorsement.  | Development of additional Business Cases          |

|  |   |               |
|--|---|---------------|
| CPP51012 Diploma of Residential Building Energy Assessment                     |   |               |
| CPP41212 Certificate IV in NatHERS Assessment                                  |   |               |
| <b>2017-18</b>   |   |               |
| Building Information Modelling Project (BIM) in the Property Services Industry | A review of Building Information Modelling (BIM) across all sectors of the property services industry, considering the impact it is having on service delivery, skills needs and job design. This will be completed alongside a review of BIM in the construction, plumbing and services industry and will identify the units of competency and qualifications that will need amendment to meet this emerging technology. These will be identified through the current transition work being undertaken | Business Case |
| <b>2018-19</b>   |   |               |
| Sustainability in the Property Services Industry                               | A review of sustainability principles and their application to all sectors of the property services industry is required considering the impact it is having on service delivery, skills-needs and job design and will identify the units of competency and qualifications that will need amendment to meet this emerging technology. These will be identified through the current transition work being undertaken.  | Business Case |
| CPP30115 Certificate III in Urban Pest Management                              | This qualification will be due for review in 2019. Industry and stakeholders report that there is a shift occurring in this sector towards non-chemical methods of pest control to a much larger extent than is currently reflected in the training package. In addition, there is a shift in focus from treatment to prevention. Growth in employment is also predicted in this sector.  | Business Case |
| <b>2019-20</b>   |   |               |
| Digitalisation of Business Processes in the Property Services Industry         | A review of the digitalisation of business processes across all sectors of the property services industry, considering the impact it is having on service delivery, skills needs and job design and will identify the units of competency and qualifications that will need amendment to meet this emerging   | Business Case |

|   |   |               |
|---|---|---------------|
|   | technology. These will be identified through the current transition work being undertaken.  |               |
| CPP20116 Certificate II in Surveying and Spatial Information Services<br>CPP30216 Certificate III in Surveying and Spatial Information Services<br>CPP40216 Certificate IV in Surveying<br>CPP40316 Certificate IV in Spatial Information Services<br>CPP50216 Diploma of Spatial Information Services<br>CPP50116 Diploma of Surveying<br>CPP60116 Advanced Diploma of Surveying | These qualifications will be due for review in 2020. Industry and key stakeholders report that rapid technological change is occurring in the surveying and spatial information services industry. These advances are resulting in changes in job design, as well as altering the skills needed when working in this area. These changes need to be further researched and reflected in the training package. This review could be confined to the addition of new units relating to technological developments such as BIM and the use of drones. In addition, there are persistent skills shortages for surveyors and quantity surveyors, and growth in employment is predicted in this sector. | Business Case |
| CPP30416 Certificate III in Strata Community Management<br>CPP40516 Certificate IV in Strata Community Management<br>CPP50316 Diploma of Strata Community Management  | These qualifications will be due for review in 2020.  | Business Case |
| CPP20611 Certificate II in Cleaning Operations<br>CPP30316 Certificate III in Cleaning Operations<br>CPP40416 Certificate IV in Cleaning Management   | These qualifications will be due for review in 2020.  | Business Case |
| CPP20411 Certificate II in Waste Management<br>CPP30711 Certificate III in Waste Management<br>CPP40911 Certificate IV in Waste Management<br>CPP50811 Diploma of Waste Management  | These qualifications will be due for review in 2020.  | Business Case |
| CPP31212 Certificate III in Swimming Pool and Spa Servicing<br>CPP41312 Certificate IV in Swimming Pool and Spa Servicing   | These qualifications will be due for review in 2020.  | Business Case |
| CPP40811 Certificate IV in Access Consulting<br>CPP50711 Diploma of Access Consulting   | The Association of Consultants in Access has recommended that these qualifications be reviewed in this period. In order to do a complete review of the qualifications in this sector, it is   | Business Case |

|  |  |  |
|--|--|--|
| CPP80313 Graduate Diploma of Access Consulting | recommended that the Diploma be also reviewed at the same time. The review of the Diploma to be completed in 2016-17 will mainly address the transition to the 2012 Standards. |  |
|--|--|--|

## **IRC Signoff**

This Work Plan was agreed to by:

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Name of Chair

Signature of Chair

Date:

# IRC Training Product Review Plan 2016-17 to 2019-2020: Property Services IRC

Contact details: Artibus Innovation, 373 Elizabeth Street, Hobart TAS 7000. Ph: (03) 6218 2841

Date submitted to the Department of Education and Training: 29 September 2016

| Planned review start<br>(Year) | Training package code | Training package name | Qualification code | Qualification name                           | Unit of Competency code | Unit of competency name |
|--------------------------------|-----------------------|-----------------------|--------------------|--|-------------------------|-------------------------|
| 2016-17                        | CPP07                 | Property Services     | CPP10107           | Security Operations                          |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP20212           | Security Operations                          |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP20307           | Technical Security                           |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP30411           | Security Operations                          |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP30507           | Technical Security                           |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP30607           | Investigative Services                       |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP40707           | Security and Risk Management                 |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP50611           | Security and Risk Management                 |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP30211           | Property Services (Agency)                   |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP30311           | Property Services (Operations)               |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP40307           | Property Services (Real Estate)              |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP40507           | Property Services (Business Broking)         |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP40407           | Property Services (Stock and Station Agency) |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP40611           | Property Services (Operations)               |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP50307           | Property Services (Agency Management)        |                         |                         |
| 2016-17                        | CPP07                 | Property Services     | CPP50409           | Property Services (Business Broking)         |                         |                         |

|         |       |                   |          |   |  |  |
|---------|-------|-------------------|----------|---|--|--|
| 2016-17 | CPP07 | Property Services | CPP50511 | Property Services (Asset and Facility Management) |  |  |
| 2016-17 | CPP07 | Property Services | CPP60211 | Property Services (Asset and Facility Management) |  |  |
| 2016-17 | CPP07 | Property Services | CPP20511 | Fire Protection Inspection and Testing            |  |  |
| 2016-17 | CPP07 | Property Services | CPP30811 | Fire Protection Inspection and Testing            |  |  |
| 2016-17 | CPP07 | Property Services | CPP20611 | Cleaning Operations                               |  |  |
| 2016-17 | CPP07 | Property Services | CPP50711 | Access Consulting                                 |  |  |
| 2016-17 | CPP   | Property Services | CPP20411 | Waste Management                                  |  |  |
| 2016-17 | CPP   | Property Services | CPP30711 | Waste Management                                  |  |  |
| 2016-17 | CPP   | Property Services | CPP31212 | Swimming Pool and Spa Service                     |  |  |
| 2016-17 | CPP   | Property Services | CPP40911 | Waste Management                                  |  |  |
| 2016-17 | CPP   | Property Services | CPP40811 | Access Consulting                                 |  |  |
| 2016-17 | CPP   | Property Services | CPP41110 | Home Sustainability Assessment                    |  |  |
| 2016-17 | CPP   | Property Services | CPP41212 | NatHERS Assessment                                |  |  |
| 2016-17 | CPP   | Property Services | CPP41312 | Swimming Pool and Spa Service                     |  |  |
| 2016-17 | CPP   | Property Services | CPP50811 | Waste Management                                  |  |  |
| 2016-17 | CPP   | Property Services | CPP50911 | Building Design                                   |  |  |
| 2016-17 | CPP   | Property Services | CPP51012 | Residential Building Energy Assessment            |  |  |
| 2016-17 | CPP   | Property Services | CPP80113 | Building Design                                   |  |  |
| 2016-17 | CPP   | Property Services | CPP80213 | Building Design                                   |  |  |
| 2016-17 | CPP   | Property Services | CPP80313 | Access Consulting                                 |  |  |
| 2018-19 | CPP   | Property Services | CPP30115 | Urban Pest Management                             |  |  |
| 2019-20 | CPP   | Property Services | CPP20116 | Surveying and Spatial Information Services        |  |  |
| 2019-20 | CPP   | Property Services | CPP30216 | Surveying and Spatial Information Services        |  |  |
| 2019-20 | CPP   | Property Services | CPP40216 | Surveying   |  |  |
| 2019-20 | CPP   | Property Services | CPP40316 | Spatial Information Services                      |  |  |

|         |     |                   |          |                                 |  |  |
|---------|-----|-------------------|----------|---------------------------------|--|--|
| 2019-20 | CPP | Property Services | CPP50216 | Spatial Information Services    |  |  |
| 2019-20 | CPP | Property Services | CPP50116 | Surveying                       |  |  |
| 2019-20 | CPP | Property Services | CPP60116 | Surveying                       |  |  |
| 2019-20 | CPP | Property Services | CPP30416 | Strata Community Management     |  |  |
| 2019-20 | CPP | Property Services | CPP40516 | Strata Community Management     |  |  |
| 2019-20 | CPP | Property Services | CPP50316 | Strata Community Management     |  |  |
| 2019-20 | CPP | Property Services | CPP30316 | Cleaning Operations             |  |  |
| 2019-20 | CPP | Property Services | CPP40416 | Cleaning Operations             |  |  |
| 2019-20 | CPP | Property Services | CPP20411 | Waste Management                |  |  |
| 2019-20 | CPP | Property Services | CPP30711 | Waste Management                |  |  |
| 2019-20 | CPP | Property Services | CPP40911 | Waste Management                |  |  |
| 2019-20 | CPP | Property Services | CPP50811 | Waste Management                |  |  |
| 2019-20 | CPP | Property Services | CPP31212 | Swimming Pool and Spa Servicing |  |  |
| 2019-20 | CPP | Property Services | CPP41312 | Swimming Pool and Spa Servicing |  |  |
| 2019-20 | CPP | Property Services | CPP40811 | Access Consulting               |  |  |
| 2019-20 | CPP | Property Services | CPP50711 | Diploma of Access Consulting    |  |  |
| 2019-20 | CPP | Property Services | CPP80313 | Access Consulting               |  |  |

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