Australian Government

Australian Workforce and Productivity Agency

Administrative and support services

…covers employment services, travel agency and tour arrangement services, administrative services, building cleaning, pest control and gardening services, and packaging services.

This suite of Industry Snapshots complements *Future Focus*, the 2013 National Workforce Development Strategy. These snapshots provide additional information and analysis on each industry to assist stakeholders in planning for the future of their industry or sector. It should be noted that the longer term data contained in this publication is based on AWPA's four scenarios for Australia to 2025 and is not intended to be compared to other data sources or projections.

Key points

- Administrative and support services employs approximately 397,200 people, accounting for just over three per cent of the total Australian workforce.
- Employment within the industry is spread relatively evenly between small-sized enterprises (i.e. those that employ less than 20 workers), medium-sized enterprises (i.e. those that employ between 20 and 199 workers) and large enterprises (i.e. those that employ 200 workers or more).
- 35 per cent of employment in administrative and support services occurs in regional and remote areas—slightly less than the all-industry average of 37 per cent.[1]
- Over half of industry workers are female (52 per cent), compared to 46 per cent of the Australian workforce as a whole.
- 40 per cent of the workforce is employed part-time, compared to 30 per cent for all industries.
- Nearly half of administrative and support services workers (45 per cent) do not hold post-school qualifications, although one in five workers has completed a Bachelor degree or higher qualification.
- A detailed employment profile for administrative and support services (including information on its workforce, industry and occupational characteristics) can be found at www.skillsinfo.gov.au.

Industry outlook

The administrative and support services sector is a small but important industry, contributing around 2.6 per cent ($35.3b) to the Australian economy in terms of total industry value added in 2011–12.[2]

[1] Regional and remote areas are defined as those outside state capital cities.

[2] 'Industry value added' is the measure of the contribution by industry to gross domestic product (GDP) at basic prices. ABS (2012) *Australian System of National Accounts*, cat. no. 5204.0.

Short-term growth

Employment in the administrative and support services grew strongly over the last five years, at 14.9 per cent, which is more than twice the average for all industries, at 7.4 per cent. However growth has been uneven across the industry subsectors, with employment in Administrative Services declining slightly while employment in Building Cleaning, Pest Control and Other Support Services has grown by 31 per cent during this period, an increase of some 48,100 workers.

Table 1 Current and past employment in administrative and support services

Industry	Current employment		Past growth: five years	
	'000	% of total	'000	%
Administrative and Support Services	**397.2**	**3.4**	**51.6**	**14.9**
Administrative Services	186.7	1.7	-1.1	-0.6
Building Cleaning, Pest Control and Other Support Services	203.1	1.8	48.1	31.0
All industries	**11,588.7**	**100.0**	**798.1**	**7.4**

Note: Data for industry subsectors may not sum to the industry total because data for each subsector have been separately seasonally adjusted and trended and at the higher levels include 'not further defined' categories.
Source: ABS (2013) *Labour Force Australia*, February, cat. no. 6291.0.55.003 (DEEWR trend).

Long-term growth

Australia needs to position itself in a world where work is changing rapidly. Technological innovation, globalisation, the Asian century and new patterns of work are impacting on the demand for skills and the speed of change is making it hard to predict and plan for the future.

To deal with this uncertainty, AWPA has adopted a scenario planning approach to help us overcome these limitations in making projections about the future. Scenarios are alternative visions of potential futures, and provide a means to make decisions that take account of uncertainty.

AWPA developed four possible, plausible scenarios for Australia to 2025.

- In the **Long Boom** scenario, the high demand for resources traded with China and other countries continues. Industries challenged by the high terms of trade undertake structural adjustment. This results in a scenario of sustained prosperity and a restructured economy.
- In **Smart Recovery**, the challenges facing Europe and the United States affect financial markets. This means low growth for Australia to 2014–15. Growth then improves and Australia benefits from industry and government strategies to implement a knowledge economy.
- In **Terms of Trade Shock**, resource prices fall mainly due to increased supply from other countries, the Australian dollar falls and we move to a broader-based economy.
- **Ring of Fire** is a risky world with multiple economic and environmental shocks resulting in ongoing lower growth.

Economic modelling against each of these four scenarios was undertaken by Deloitte Access Economics (DAE) to determine the skills demand for the economy into the future.[3]

As Table 2 shows, the administrative and support services industry is forecast to grow at a rate slightly above the all industries average to 2025 in the Long Boom world, but slightly below the average under the other three scenarios. Employment in the Administrative Services subsector is expected to show a small decrease in the years to 2018 under the Smart Recovery and Terms of Trade Shock scenarios, while a more substantial decline in the Ring of Fire scenario is predicted to lead to negative employment growth for the industry as a whole to 2018, before recovering in the years to 2025.

Table 2 Average annual industry employment growth in four scenarios, 2011–18 and 2011–25 (% per annum)

Industry	Long Boom		Smart Recovery		Terms of Trade Shock		Ring of Fire	
	2018	**2025**	**2018**	**2025**	**2018**	**2025**	**2018**	**2025**
Administrative and Support Services	3.4	2.1	0.4	1.2	0.8	1.5	-0.7	0.5
Administrative Services	4.3	2.2	1.4	1.4	1.8	1.6	0.2	0.6
Building Cleaning, Pest Control and Other Support Services	2.4	2.0	-0.5	1.1	-0.1	1.4	-1.7	0.4
All industries	**2.1**	**2.0**	**1.5**	**1.5**	**1.7**	**1.6**	**0.8**	**0.7**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output–detailed employment results.

Occupation outlook

Key occupations

The top ten administrative and support services occupations account for more than half of industry employment as a whole. Commercial Cleaners constitute the largest occupational group in the industry by a wide margin, at 20.0 per cent, followed by Human Resource Professionals (7.0 per cent); Domestic Cleaners (6.2 per cent); and Gardeners (5.3 per cent).

[3] A description of the scenarios and the Deloitte Access Economics modeling of employment in each, with state and territory breakdowns, is available at the AWPA website www.awpa.gov.au.

Table 3 Top ten administrative and support services occupations

Occupation		People employed	Industry employment
		'000	% of total
8112	Commercial Cleaners	79.9	20.0
2231	Human Resource Professionals	28.1	7.0
8113	Domestic Cleaners	24.7	6.2
3622	Gardeners	20.9	5.3
4516	Tourism and Travel Advisers	19.4	4.9
8414	Garden and Nursery Labourers	15.3	3.8
1493	Conference and Event Organisers	9.6	2.4
5411	Call or Contact Centre Workers	9.6	2.4
8321	Packers	7.2	1.8
8110	Cleaners and Laundry Workers nfd [(a)]	6.7	1.7
5121	Office Managers	6.4	1.6
Total administrative and support services		**398.9**	**57.1**

Note: (a) 8110 Cleaners and Laundry Workers nfd refer to occupations at the three-digit ANZSCO level which cannot be further defined at the four-digit level. As data is not available for these occupational groups at the required level of detail, they have been omitted from Tables 4-7.
Source: ABS (2013) *Labour Force Australia*, detailed quarterly report, 2012 average of four quarters, cat. no. 6291.0.55.003.

Short-term growth

Table 4 shows current employment and past growth for the occupations that feature prominently within the industry. **Note that the figures refer to the expected number of people in these occupations across all industries, not just in administrative and support services**.

Domestic Cleaners show the highest short-term employment growth, at 23.8 per cent in the past five years. This is followed by Gardeners, at 17.9 per cent, and Conference and Event Organisers, at 17.5 per cent.

Table 4 Current and past employment in key occupations

Occupation		Current employment (all industries)		Past growth: five years	
		'000	% of total	'000	%
8112	Commercial Cleaners	158.9	1.4	16.2	11.3
2231	Human Resource Professionals	56.7	0.5	0.0	0.0
8113	Domestic Cleaners	33.1	0.3	6.4	23.8
3622	Gardeners	70.3	0.6	10.7	17.9
4516	Tourism and Travel Advisers	16.9	0.1	-7.1	-29.5
8414	Garden and Nursery Labourers	32.0	0.3	0.2	0.5
1493	Conference and Event Organisers	23.9	0.2	3.6	17.5
5411	Call or Contact Centre Workers	25.4	0.2	-3.8	-13.0
8321	Packers	63.8	0.6	-5.4	-7.8
5121	Office Managers	126.9	1.1	-16.7	-11.6
All employed		**11,588.7**	**100.0**	**798.1**	**7.4**

Source: ABS (2013) *Labour Force Australia*, February, cat. no. 6291.0.55.003 (DEEWR trend).

Conversely, employment of Tourism and Travel Advisers has decreased dramatically over the past five years, as has employment of Call or Contact Centre Workers; and Office Managers.

Long-term growth and job openings

Table 5 indicates the long-term net job growth per annum expected in these occupation groups, according to Deloitte Access Economics' economic modelling of the scenarios.

The highest rate of employment growth to 2025 is forecast for Conference and Event Organisers across all scenarios, with particularly high growth expected in the years to 2018. Office Managers; Human Resource Professionals; and Call or Contact Centre Workers also show consistently high growth across the scenarios, reversing the decline in employment seen over the past five years (as shown in Table 4). The occupations with the lowest expected employment growth are Packers and Garden and Nursery Labourers, with each occupation expected to experience either a small rate of growth or a decline in employment across most scenarios.

Table 5 Average annual occupation growth in four scenarios, 2011–18 and 2011–25 (%pa)

Industry		Long Boom		Smart Recovery		Terms of Trade Shock		Ring of Fire	
		2018	2025	2018	2025	2018	2025	2018	2025
8112	Commercial Cleaners	2.4	1.7	1.0	1.1	1.4	1.3	0.3	0.4
2231	Human Resource Professionals	4.2	2.3	2.9	1.8	3.2	2.0	2.1	1.2
8113	Domestic Cleaners	0.7	1.0	-1.1	0.4	-0.7	0.5	-1.9	-0.4
3622	Gardeners	1.6	1.3	0.0	0.7	-0.2	0.4	-1.1	-0.3
4516	Tourism and Travel Advisers	2.8	2.0	0.6	1.3	1.2	1.5	-0.4	0.4
8414	Garden and Nursery Labourers	1.0	0.9	-0.4	0.3	-0.3	0.3	-1.3	-0.5
1493	Conference and Event Organisers	7.1	5.5	6.4	5.0	6.7	5.2	5.8	4.5
5411	Call or Contact Centre Workers	2.5	2.2	1.8	1.8	2.0	1.8	1.2	1.1
8321	Packers	0.2	-0.1	-0.1	-0.5	0.1	-0.3	0.2	-0.3
5121	Office Managers	3.4	2.2	2.7	1.8	2.8	1.8	2.1	1.2
All occupations		**2.1**	**2.0**	**1.5**	**1.5**	**1.7**	**1.6**	**0.8**	**0.7**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output—detailed employment results.

As noted, the data in Table 5 concerns employment growth in an industry. The number of total **job openings** which includes both employment growth and **the replacement resulting from individuals leaving the occupation net of those re-entering** can also be estimated. This replacement requirement is particularly significant in industries where there are high numbers of people retiring or leaving the occupation.

Table 6 shows the average annual job openings projected in key occupations to 2025. Occupations such as Commercial Cleaners and Domestic Cleaners are expected to have job opening rates to 2025 close to the all-industry average across all scenarios, while others—such as Conference and Event Organisers; and Tourism and Travel Advisers—are forecast to have job opening rates well above the average. Conversely, Gardeners are expected to have relatively few job openings per annum to 2025.

Table 6 Average annual job openings per annum, 2011 to 2025, in four scenarios

Occupation		Long Boom		Smart Recovery		Terms of Trade Shock		Ring of Fire	
		('000)	%	('000)	%	('000)	%	('000)	%
8112	Commercial Cleaners	8.1	4.4	6.7	3.8	7.1	4.0	5.2	3.1
2231	Human Resource Professionals	3.0	3.4	2.7	2.9	2.7	3.0	2.2	2.3
8113	Domestic Cleaners	2.1	4.4	1.8	3.7	1.8	3.9	1.5	2.9
3622	Gardeners	2.5	2.2	2.1	1.6	1.8	1.3	1.5	0.6
4516	Tourism and Travel Advisers	1.4	4.7	1.2	4.0	1.3	4.3	1.0	3.2
8414	Garden and Nursery Labourers	1.9	3.5	1.6	2.9	1.6	2.9	1.3	2.0
1493	Conference and Event Organisers	2.2	7.0	2.0	6.5	2.1	6.7	1.8	6.0
5411	Call or Contact Centre Workers	1.4	3.4	1.2	3.0	1.2	3.1	0.9	2.4
8321	Packers	2.2	3.0	2.2	2.7	2.2	2.8	2.2	2.9
5121	Office Managers	5.9	3.6	5.0	3.1	5.1	3.2	3.9	2.5
All occupations		**576.4**	**4.4**	**500.9**	**3.9**	**513.3**	**4.0**	**391.4**	**3.1**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output—detailed employment results. Net replacement demand by AWPA (2013).

As Table 7 shows, around half the key occupations within the administrative and support services industry have the majority of job openings created by replacement demand rather than new growth (that is, new jobs). Under the three higher growth scenarios, five occupations: Commercial Cleaners; Domestic Cleaners; Tourism and Travel Advisers; Garden and Nursery Labourers; and Packers all have most of their job openings driven by replacement requirements. High replacement demand may reflect the age profile of these occupations but also other workforce dynamics such as the rate of job turnover, particularly within lower-skilled, manual jobs such as cleaning and labouring. Conversely, job openings among the remaining occupations, such as Human Resource Professionals; Office Managers; and Conference and Event Organisers, are expected to be driven by new growth rather than replacement requirements.

Table 7 Total job openings (growth and net replacement) in four scenarios, 2011 to 2025

7.1 Long Boom

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
8112	Commercial Cleaners	44.1	36.5	76.7	63.5	120.8	100.0
2231	Human Resource Professionals	31.7	70.5	13.2	29.5	44.9	100.0
8113	Domestic Cleaners	13.5	43.6	17.5	56.4	31.0	100.0
3622	Gardeners	26.9	71.2	10.9	28.8	37.8	100.0
4516	Tourism and Travel Advisers	9.5	44.1	12.1	55.9	21.6	100.0
8414	Garden and Nursery Labourers	11.0	39.5	16.8	60.5	27.9	100.0
1493	Conference and Event Organisers	24.6	75.3	8.1	24.7	32.7	100.0
5411	Call or Contact Centre Workers	12.6	61.3	8.0	38.7	20.6	100.0
8321	Packers	2.7	8.0	30.5	92.0	33.1	100.0
5121	Office Managers	53.5	61.0	34.2	39.0	87.8	100.0
All occupations		**3,889.7**	**45.0**	**4,755.6**	**55.0**	**8,645.3**	**100.0**

7.2 Smart Recovery

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
8112	Commercial Cleaners	28.6	28.6	71.4	71.4	100.0	100.0
2231	Human Resource Professionals	27.7	69.0	12.4	31.0	40.1	100.0
8113	Domestic Cleaners	10.7	40.0	16.0	60.0	26.7	100.0
3622	Gardeners	21.4	68.1	10.0	31.9	31.5	100.0
4516	Tourism and Travel Advisers	7.2	40.0	10.9	60.0	18.1	100.0
8414	Garden and Nursery Labourers	7.6	32.7	15.6	67.3	23.3	100.0
1493	Conference and Event Organisers	22.1	74.0	7.8	26.0	29.8	100.0
5411	Call or Contact Centre Workers	10.1	56.9	7.6	43.1	17.7	100.0
8321	Packers	2.5	7.6	29.8	92.4	32.3	100.0
5121	Office Managers	42.7	56.5	32.9	43.5	75.6	100.0
All occupations		**2,953.2**	**39.3**	**4,559.6**	**60.7**	**7,512.9**	**100.0**

7.3 Terms of Trade Shock

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
8112	Commercial Cleaners	32.8	30.9	73.3	69.1	106.0	100.0
2231	Human Resource Professionals	27.8	68.7	12.7	31.3	40.4	100.0
8113	Domestic Cleaners	11.1	40.3	16.4	59.7	27.5	100.0
3622	Gardeners	17.7	64.0	9.9	36.0	27.6	100.0
4516	Tourism and Travel Advisers	7.5	40.0	11.3	60.0	18.8	100.0
8414	Garden and Nursery Labourers	7.5	32.2	15.8	67.8	23.3	100.0
1493	Conference and Event Organisers	22.9	74.4	7.9	25.6	30.8	100.0
5411	Call or Contact Centre Workers	10.6	57.7	7.7	42.3	18.3	100.0
8321	Packers	2.5	7.7	30.1	92.3	32.7	100.0
5121	Office Managers	43.1	56.6	33.1	43.4	76.2	100.0
All occupations		**3,080.4**	**40.0**	**4,619.3**	**60.0**	**7,699.6**	**100.0**

7.4 Ring of Fire

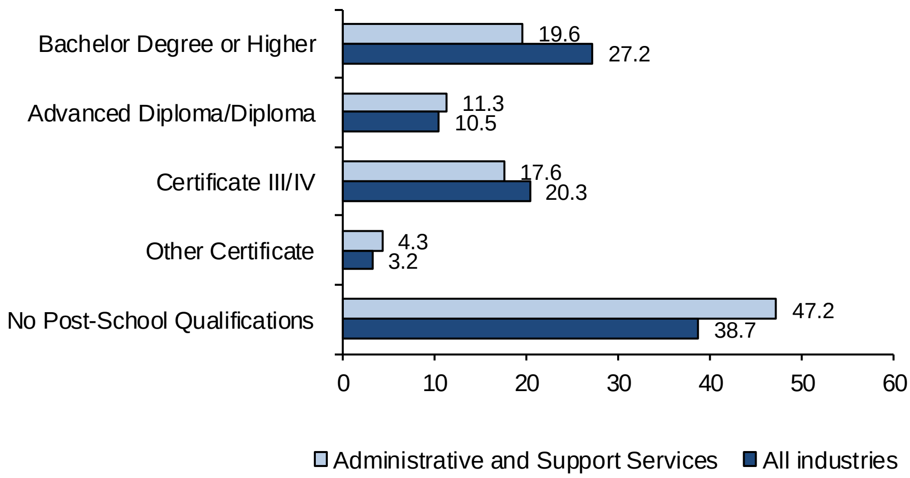
Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
8112	Commercial Cleaners	10.3	13.1	67.9	86.9	78.2	100.0
2231	Human Resource Professionals	21.7	64.8	11.8	35.2	33.6	100.0
8113	Domestic Cleaners	7.4	33.0	15.1	67.0	22.6	100.0
3622	Gardeners	13.6	59.3	9.4	40.7	23.0	100.0
4516	Tourism and Travel Advisers	4.4	30.4	10.2	69.6	14.6	100.0
8414	Garden and Nursery Labourers	4.1	21.8	14.7	78.2	18.9	100.0
1493	Conference and Event Organisers	18.9	71.7	7.5	28.3	26.4	100.0
5411	Call or Contact Centre Workers	6.3	46.1	7.3	53.9	13.6	100.0
8321	Packers	2.8	8.6	30.3	91.4	33.1	100.0
5121	Office Managers	27.4	46.5	31.5	53.5	58.8	100.0
All occupations		**1,532.9**	**26.1**	**4,338.5**	**73.9**	**5,871.4**	**100.0**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output—detailed employment results. Net replacement demand by AWPA (2013).

Education and training profile

Approximately half (47.2 per cent) of workers in administrative and support services do not hold a post-school qualification, while the remainder hold a Bachelor degree or higher qualification (19.6 per cent); a Diploma or Advanced Diploma (11.3 per cent); a Certificate III/IV (16 per cent), or other certificate (7.1 per cent).

Figure 1 Education profile of the administrative and support services workforce (%)



Note: Excludes 'Level of education not stated' from total.
Source: DEEWR (2012) *Australian Jobs 2012* (ABS 2011 Census data).

Figure 2 illustrates how demand for qualifications is expected to change over time. It shows the current education profile for each respective occupation: across all industries and within the administrative and support services industry. It also shows projected levels of educational attainment to 2025 by each occupation group depending on which of the four scenarios eventuates.

As Figure 2 shows, the proportion of managers with Bachelor degrees or higher is expected to increase from 39 per cent in 2011 to more than 50 per cent in 2025 under the three higher growth scenarios.

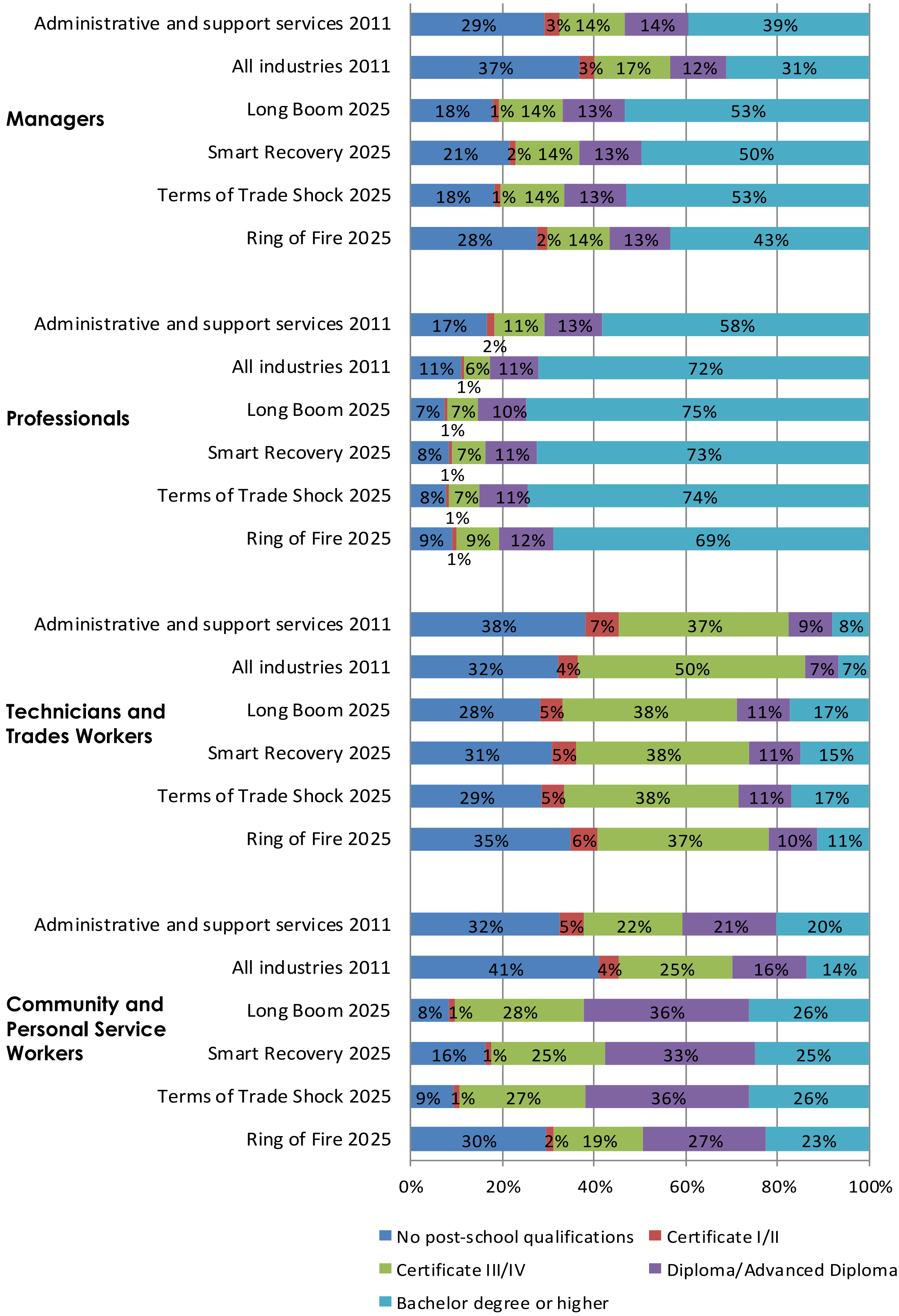
A similar pattern of upskilling can be observed for managers within the industry, with the proportion holding Bachelor degrees or higher expected to rise from 58 per cent in 2011 to around three-quarters in the Long Boom, Smart Recovery and Terms of Trade Shock worlds.

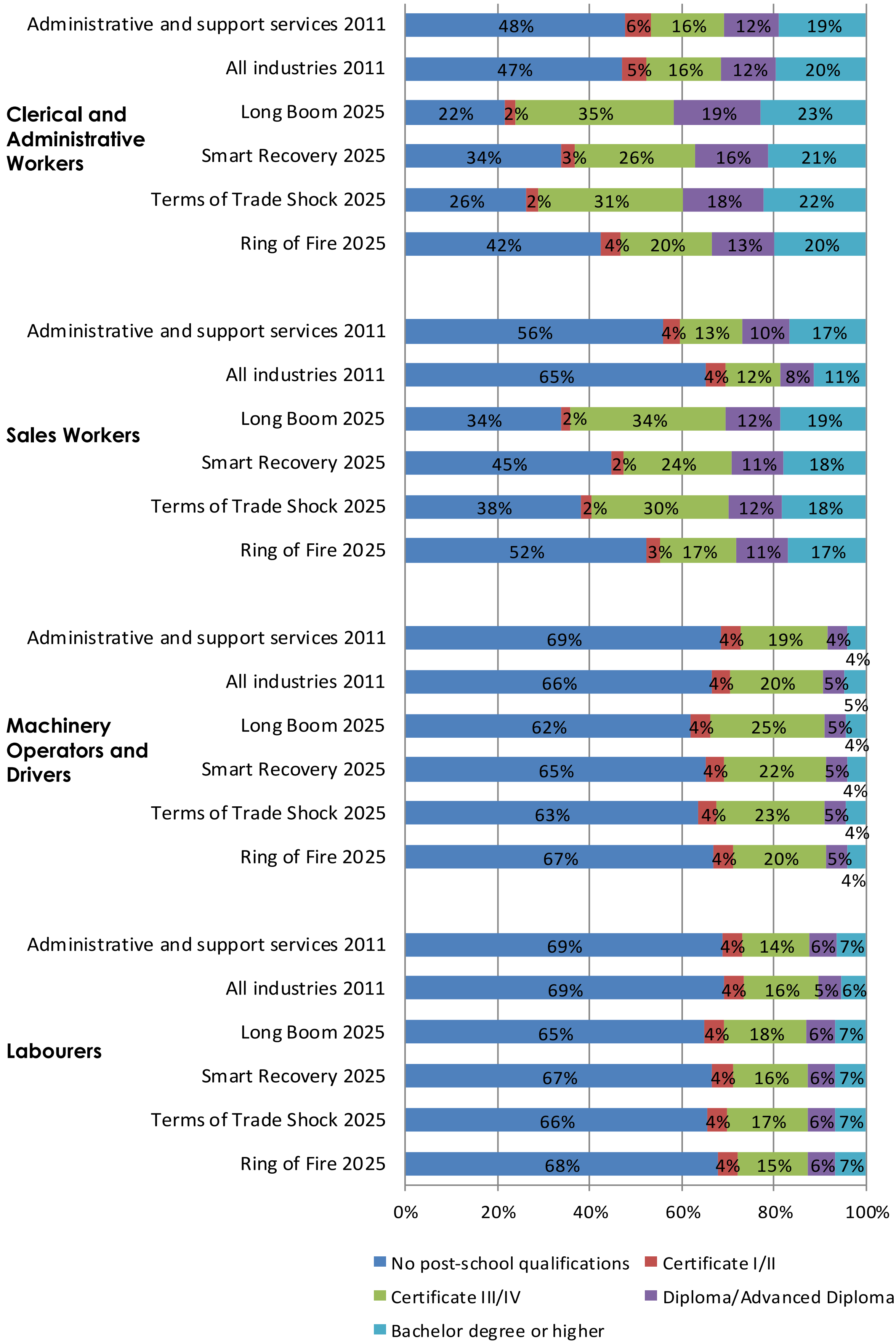
The proportion of community and personal services workers without a post-school qualification is forecast to decrease dramatically under the three higher growth scenarios to 2025, with most of the increase in qualifications expected at the Diploma and Advanced Diploma levels.

By contrast, much of the future increase in qualification holding among clerical and administrative workers is expected to be at the Certificate III/IV level. A similar pattern of upskilling is forecast for sales workers within the industry.

Finally, the qualification profile of lower-skilled workers, such as Machinery Operators and Drivers and Labourers, is expected to change little in the years to 2025, with modest increases in the proportion with Certificates III and IV.

Figure 2 Educational attainment in the administrative and support services industry by occupation: 2011 and projections to 2025 (%)





Source: ABS (2012) *Survey of Education and Work 2012*, cat. no. 6227.0; and DAE (2012) Unpublished data.

Specialised occupations

In *Future Focus*, the 2013 National Workforce Development Strategy, AWPA has proposed that national planning for skills and industry workforce development should focus on **specialised occupations**. Specialised occupations are defined as those 'where specialised skills, learned in formal education and training, are needed at entry level and where the impact of market failure is potentially significant for the economy and/or the community.'

Specialised occupations demonstrate these characteristics:

- long lead time—skills are highly specialised and require extended learning and preparation time over several years;
- high use—skills are deployed for the uses intended (i.e. good occupational 'fit');
- high risk—the disruption caused by the skills being in short supply is great, resulting either in bottlenecks in supply chains or imposing significant economic or community costs because an organisation cannot operate; and
- high information—the quality of information about the occupation is adequate to the task of assessing future demand and evaluating the first three criteria.

Monitoring skills supply, especially for specialised occupations, will remain a critical element in meeting our workforce needs.

As the administrative and support services sector consists primarily of clerks and administrative workers; personal service and travel workers; call centre operators and packers, there are few specialised occupations relevant for this industry.

This is primarily because the industry does not presently require the majority of its workforce to have formal qualifications necessitating 'long lead time'. These highly specialised skills require a commitment of at least four years for university study; 3 or 4 years for apprenticeships; or at least 1000 hours for vocational courses. Given the 'long lead time' requirement, the 'specialised occupations' criteria will not be as relevant for the administrative and support services sector as will be the case for other industries.

While there are some management and professional occupations that may be loosely associated with the sector (such as Accountants), there is limited demand for post-school qualifications among the broader workforce at present. This is reflected in the education profile of the industry (Figure 1). However, as Figure 2 shows this demand may change over time, depending on which future scenario unfolds.

More detailed information about specialised occupations is available in *Future Focus, 2013 National Workforce Development Strategy* at http://www.awpa.gov.au.

Example workforce development initiatives

Investment in workforce development has been shown to maximise people's capabilities, lift productivity and increase workforce participation. Employee satisfaction levels and engagement also increase when enterprises make better use of their employees' skills.[4] Current workforce development initiatives in administrative and support services include the following examples:

- The **Discuss, Display, Do Project** aims to develop and pilot a Recognition of Prior Learning (RPL) model suitable to the needs of volunteers and volunteer utilising organisations. The project supports the priorities in sport and recreation, as well as other related service industry sectors by developing a more responsive training system and addressing skilled worker requirements. For further information see www.serviceskills.com.au/discuss-display-do.
- **Skills and Training Information Centres (STICs)** provide information and advice on skills and training to prospective job seekers, existing workers and employers. STICs also refer employers to Industry Skills Councils where employers wish to identify their training needs. For further information see www.australianapprenticeships.gov.au/search/aacsearch.asp.

[4] Skills Australia (2012) *Better use of skills, better outcomes: A research report on skills utilisation in Australia.*