

2019

PERSONAL SERVICES

INDUSTRY REFERENCE COMMITTEE

INDUSTRY SKILLS FORECAST



SKILLSIQ

CAPABLE PEOPLE MAKE CLEVER BUSINESS

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Executive Summary

The Personal Services sector represents a range of sub-sectors: hairdressing, beauty services, floristry and funeral services. Within each sub-sector, jobs roles supported by the Training Package can involve undertaking operational, service-based and/or supervisory and management activities. The Personal Services Training Package Products consist of 25 qualifications that support pathways to employment in various job roles across the sector.

Overall, the Personal Services sector provides a significant contribution to the Australian economy. In 2018, the hairdressing and beauty sub-sectors together generated approximately \$6.5 billion in revenue in a single year and registered a combined workforce of 120,700 workers; the floristry industry generated \$90.4 million in revenue (2018–19) and employed 7,800 florists; and the funeral services industry generated \$1.6 billion in revenue (2018) and employed 6,300 workers. With the data available, strong employment growth is forecast for job roles such as Beauty Therapists, Hairdressers and Funeral Workers.

The sector, however, has been experiencing several challenges and changes which are impacting workforce skills requirements, including:

- Skills shortages – most notably in the areas of technical and ‘soft skills’ (e.g. communication, customer-focused service and online & social media engagement)
- Low attraction and retention of staff

- Government policy/legislation changes, e.g. a lack of appropriate and consistent hairdressing salon regulation across Australia.

There is no Training Package Product development work proposed for 2019–2020 as industry noted it is important to allow for the proper implementation and use of the Training Package Products which came into effect in July and September 2015, and March 2016.

Please note the Beauty Training Package Products are currently being updated with two specific areas of focus for new qualifications:

- Cosmetic Tattooing
- Skin Rejuvenation Treatments.

Note: The National Schedule details the Training Package update and development work commissioned by the Australian Industry and Skills Committee (AISC). The National Schedule is informed by this Industry Skills Forecast, which outlines the proposed timing for the update of existing Training Package Products. This Forecast has been compiled using a number of information sources, including academic literature, statistical data, Industry Reference Committee (IRC) member input and expertise, feedback received via public consultation, SkillsIQ's *2019 Future Skills Survey*, and an industry analysis of both new and emerging workforce skills needs overseen by the Personal Services IRC.

Administrative Information

Industry Reference Committee (IRC)

Personal Services

The Personal Services Industry Reference Committee (IRC) is responsible for ensuring that nationally recognised qualifications deliver the skills and knowledge required to equip the sectors under its remit with a highly skilled workforce. The sectors represent those involved in providing hairdressing, beauty, floristry and funeral services.

Skills Service Organisation (SSO)

SkillsIQ Limited

SkillsIQ supports 19 IRCs representing diverse 'people-facing' sectors. These sectors provide services to people in a variety of contexts such as customer, patient or client. The IRCs are collectively responsible for overseeing the development and review of Training Package Products, including qualifications, serving the skills needs of sectors comprising almost half of the Australian workforce.

SkillsIQ's Industry Reference Committees (IRCs)

- Aboriginal and Torres Strait Islander Health Worker
- Aged Services
- Ambulance and Paramedic
- Children's Education and Care
- Client Services
- Community Sector and Development
- Complementary Health
- Dental
- Direct Client Care and Support
- Disability Support
- Enrolled Nursing
- First Aid
- Local Government
- Personal Services
- Public Sector
- Sport and Recreation
- Personal Services
- Tourism, Travel and Hospitality
- Wholesale and Retail Services.

“ It takes skill to make a difference. We will only get skilled, valued and rounded workers when training provider, employee and employer are connected in their views on continuous learning. ”

SkillsIQ's Cross-sector Skills Committee

IRC Sign-off

Sign-off of this Industry Skills Forecast and Proposed Schedule of Work has been confirmed by the Personal Services Industry Reference Committee.

Norma Roberts,
Chair

A. Skills Forecast

A.1 Sector Overview

Introduction

The Personal Services sector incorporates a range of services. Vocational Education and Training (VET) Training Packages specifically cover four key sub-sectors, as shown in Figure 1.

Figure 1: Personal Services Training Package – Overview of Sectors



Workers across all sub-sectors can perform a variety of roles and can be involved in undertaking operational, service-based and/or supervisory and management activities. The sub-sectors are described as follows.

Hairdressing and Beauty Services

The Hairdressing and Beauty Services combined sector provides personal services to both men and women.

The types of services can include:

- Haircutting
- Hair colouring
- Hair styling
- Manicures
- Pedicures
- Facials
- Skin treatments
- Tanning
- Make-up application
- Cosmetic tattooing
- Hair removal
- Non-medical hair restoration techniques.

In Australia, the hair and beauty sector is estimated to have generated an annual revenue of \$6.5 billion in 2018, and forecasts show strong growth is expected over the next five years. Drivers of future growth include an expected rise in demand for permanent hair removal services, the rise in popularity of male grooming specialty salons and organic salons, and continued increases in demand for beauty treatment services (i.e. spa treatments, massages, relaxation and other beauty treatments).¹ Health consciousness is also an important factor driving demand for services as individuals increasingly access products and services related to enhancing their image.

Technology, social media and innovation have been important factors shaping the way hairdressing and beauty services are provided and promoted. With results-driven services at the forefront of business growth strategies, the adoption of specialised equipment and technologies, such as those used for facial peels, laser hair removal, skin rejuvenation and cosmetic tattooing, has been key to supporting businesses in their continued growth.

The sector is highly competitive and comprises mainly micro and small-to-medium sized commercial businesses. The workforce size is significant, with 120,700 workers² employed across the combined hair and beauty sector, and this has been growing steadily over the past five years. As indicated earlier, the job roles are varied and can include:

- Retail cosmetics assistant
- Salon assistant
- Beautician
- Specialist Make-Up Artist
- Nail technician
- Hairdresser
- Barber
- Beauty therapist
- Session stylist
- Hairdressing / Beauty therapy / Nail salon owner / manager
- Hairdressing creative director
- IPL and laser therapist.

Floristry

The Floristry sector comprises retailers that sell cut flowers and, in most cases, sell specific hand-crafted floral items. These retailers are involved in purchasing flowers directly from growers or through wholesale dealers to sell directly to consumers, either just 'as they are' or in arrangements.³ Whilst the market for bricks-and-mortar-style flower shops has remained relatively unchanged over the past five years, the online flower shop market, in contrast, has taken off rapidly and grown at an annual rate of 6.4% (between 2014 and 2019). Online floral retailer operations involve the receipt of orders and payments through websites and online platforms, and deliver orders using local networks of florists or growers.⁴ Online sales and the delivery of flowers and arrangements is expected to experience continued strong growth across Australia and overall this line of trading is currently generating an annual revenue of \$90.4 million (2018–19).

Job roles across the sector can be involved in adding value to floristry products and applying skills to displaying and arranging flowers to cater to events such as weddings, funerals and corporate or public events.

These services include tailored design options that require specialist technical and creative skills. Examples of job roles include:

- Floristry assistant
- Florist
- Senior florist
- Floral designer.

Funeral Services

The Funeral Services sector comprises funeral homes, cemeteries and crematoria, where services involve preparing the deceased for burial, interment or cremation, organising funerals and operating burial sites and funeral homes. In Australia, the sector is estimated to have generated \$1.6 billion in revenue (2018-19), having experienced an annual increase of 3.2% over the past five years. Funeral businesses are traditionally structured around family-operated, private operations (especially in regional/rural areas). However, one large multi-firm enterprise which trades under various brand names, InvoCare Limited (brand names which include White Lady Funerals, Blackwell Funerals and Guardian Funerals) **holds majority share of the market.**⁵

Similar to the other Personal Services' sectors outlined above, funeral services have been impacted by technology and the development of digital services.

Examples of emerging practices include the offer of webcasts for funeral services and the introduction of QR codes on headstones. Overall, the implementation and promotion of personalised service has been a priority for businesses, in order to achieve continued growth and differentiation in the market.

The sector comprises approximately 6,300 workers,⁶ and job roles can represent a range of multi-levelled jobs and functions, including:

- Funeral director's assistant
- Assistant funeral director
- Mortuary assistant
- Mortuary supervisor
- Funeral director
- Embalmer
- Mortuary manager.

Businesses Involved

Businesses operating in the service areas outlined earlier include a range of small, medium and large enterprises, spread across the country. Some examples and counts of relevant business types involved in hiring workers supported by the Personal Services Training Package across Australia include:⁷

Personal Services sector	Number of businesses
Hairdressing and beauty services	22,156
Flower retailers*	2,210
Online flower shops*	88
Funeral homes, crematoria and cemeteries	820

Note: *In many cases, flower retailers with bricks-and-mortar businesses will also have an online presence in order to enable their customers to purchase products and services using the internet. This is not currently captured in these statistics, so the figures are presented as indicative only of potential volume across the country.

Stakeholders

Key stakeholders represent a range of organisations that perform a variety of strategic, regulatory and operational roles in the Personal Services sectors. Stakeholders play an important role during Training Package reviews by supplying industry insights to ensure updates are in line with industry needs. Examples of stakeholder organisations include:

- Government departments and agencies (Commonwealth and state/territory-based)
- Industry Advisory Councils
- Peak bodies and industry associations (i.e. across the sectors listed earlier)
- Employee associations
- Registered Training Organisations (RTOs) both public and private and their representative bodies
- Small, medium and large-sized private and public employers across metropolitan, regional, rural and remote areas, including for-profit and not-for-profit organisations.

Challenges and Opportunities

Note: These findings are based on desk research and SkillsIQ's *2019 Future Skills Survey* (conducted between November 2018 and January 2019) which have been filtered to include stakeholders from the Personal Services sectors only. Insights and advice from IRC members and public consultation have also been used to compile and validate the information provided.

Skills shortages

Employers across the sectors, in particular those involved in hairdressing and beauty services, are challenged with finding skilled and experienced staff for their businesses. Graduates being trained through the VET system are in many cases being described as lacking in skills when they finish their studies, as the skills levels do not meet employer expectations.

The lack of graduates' skills and knowledge are being attributed to issues relating to the quality of training. The uptake of short, condensed and/or non-accredited training, as well as inadequate training materials, have created a source of substandard training for students.

Additionally, many students do not develop real work experience during their training due to a lack of quality work placements and opportunities to gain practical experience. Because of the considerable constraints employers face, salons are tending not to hire apprentices, and this is particularly the case for home-based salons (which are increasing in popularity). Work experience is regarded as an opportunity for students to develop both 'soft skills' and fundamental technical skills, but issues relating to the cost to employers of taking on apprentices and providing work placements are a barrier to this. Instead, there has been a rise in the institutional delivery of hairdressing qualifications, and there have therefore been diminishing opportunities for students and apprentices to gain hands-on experience of their job requirements. Specific skills shortage areas noted are:

- **General 'soft skills' - communication**
- **Customer-focused service**
- **Online and social media engagement**

The proliferation of social media has placed increasing significance on a business's ability to market itself online. Social media has become a critical tool for businesses to connect with consumers, as marketing activities are no longer purely one-way communications from business to consumer. The increasing prominence of social media requires businesses to possess highly developed engagement skills. This involves the ability to engage online and to understand the potential reach of communications and the benefits of engagement. Workforce skills training is therefore essential, and SkillsIQ has recently conducted a cross-sector project, *Consumer Engagement via Online and Social Media*, the aim of which was the development of Training Package Products to meet skills gaps in this area.

Attraction and retention

Broad reports from the Personal Services sectors cite difficulty in attracting and retaining highly skilled and qualified staff. The collective concern across the sectors is that Personal Services occupations are not valued as feasible career pathways by teachers, school career advisors or parents, all of whom have a considerable influence over the career choices of young people. As a result, jobs in the Personal Services industry are not often the first choice for long-term employment.

Furthermore, there is a high level of attrition in hairdressing apprenticeships. It is projected that hairdressing cohorts that commenced their apprenticeships in the years 2015 to 2017 will experience an increasing trend in attrition rates of 61.8%, 64.75% and 68.6% respectively.⁸ One suggestion to alleviate attrition rates in hairdressing apprenticeships is to facilitate more engagement between apprentices and industry outside of mandatory work commitments. Additionally, competition within the hairdressing industry from unregulated home-based salons acts as a drain on the supply of skilled workers. In the case of funeral director businesses, there is more of a concern with attracting the right talent than retaining staff. The sector relies on a combination of casual and part-time staff to support unpredictable demands.

Government policy / legislation changes

Owners and operators of hairdressing and beauty services businesses abide by local and state government laws regarding shop registration, work health and safety regulations and vocational education and training. However, in many states separate shop registration procedures have ceased, and the responsibility now lies with local councils to determine whether hairdressing and beauty businesses meet health regulations.

The policing and enforcing of regulation at local and state levels is at a subpar and inconsistent standard. In New South Wales, South Australia and Tasmania, salons must be operated by a registered hairdresser; in Victoria anyone can operate a salon but must be qualified if they wish to hire an apprentice; in the Northern Territory, Queensland and the Australian Capital Territory there are no operating restrictions, but apprentices and trainees must always be supervised in the workplace (specific requirements may vary according to state and territory legislation⁹); and in Western Australia the government abolished hairdressing industry registration provisions in 2010. Furthermore, the federal government deregulated the hairdressing training sector in the mid-2000s and removed the requirement for hairdressers to serve an apprenticeship.¹⁰ This situation, however, varies across jurisdictions. In Western Australia, the *Vocational Education and Training Act* (WA) states that the only way to access a *Certificate III in Hairdressing* is via an apprenticeship pathway. Hairdressers do not legally need to produce a certificate in hairdressing or have a certificate displayed in their salon.¹¹

Overall, there is a general lack of appropriate regulation in the hairdressing and beauty sectors, which has created space for an uprising of unregulated home-based salons. In effect, the popularity of unregulated home salons depletes the supply of workers in these sectors. Industry has strongly identified a need for licencing to return or be reintroduced to the hairdressing and beauty services industries (particularly relating to the use of intense pulsed light (IPL) and laser equipment and cosmetic tattooing).



General notes on statistics:

1. Enrolment and completion data is sourced from NCVER VOCSTATS (program enrolments and completions 2014–2017), accessed October 2018.
2. It is important to note that not all training providers were required to submit enrolment and completion data at the time of collection, and some figures presented may therefore under-represent the true count of enrolments and completions for a qualification. From 2018, **all** training providers were required to submit data, and current discrepancies

noted in the national NCVER figures versus actual attendance should therefore be minimal in future releases. The data presented in this report is shown for indicative purposes. Figures reflect public and private RTO data.

3. Completion data for 2017 represents preliminary outcomes (i.e. not a full year).
4. ‘-’ symbol indicates that the qualification was not listed in NCVER data at the time of reporting.
5. Qualifications in italics represent superseded qualifications.

Vocational Education and Training (VET) Qualifications Supporting Industry

The nationally recognised VET qualifications specific to **Hairdressing and Beauty Services** are:

- SHB20116 Certificate II in Retail Cosmetics
- SHB20216 Certificate II in Salon Assistant
- SHB30115 Certificate III in Beauty Services
- SHB30215 Certificate III in Make-Up
- SHB30315 Certificate III in Nail Technology
- SHB30416 Certificate III in Hairdressing
- SHB30516 Certificate III in Barbering
- SHB40115 Certificate IV in Beauty Therapy
- SHB40216 Certificate IV in Hairdressing
- SHB50115 Diploma of Beauty Therapy
- SHB50216 Diploma of Salon Management
- SHB80116 Graduate Certificate in Hairdressing Creative Leadership
- SHB60118 Advanced Diploma of Intense Pulsed Light and Laser for Hair Reduction.

Table 1: Number of Registered Training Organisations (RTOs) by nationally recognised **Hairdressing and Beauty Services** qualifications on scope – Personal Services Training Package Products

Qualification Code	Qualification Title	No. of RTOs with qualification on scope 2018*	No. of RTOs with qualification on scope 2019**
SHB20116	Certificate II in Retail Cosmetics	106	86
SHB20216	Certificate II in Salon Assistant	97	83
SHB30115	Certificate III in Beauty Services	119	96
SHB30215	Certificate III in Make-Up	61	51
SHB30315	Certificate III in Nail Technology	65	53
SHB30416	Certificate III in Hairdressing	112	98
SHB30516	Certificate III in Barbering	64	56
SHB40115	Certificate IV in Beauty Therapy	103	79
SHB40216	Certificate IV in Hairdressing	61	42
SHB50115	Diploma of Beauty Therapy	131	102
SHB50216	Diploma of Salon Management	51	41
SHB80116	Graduate Certificate in Hairdressing Creative Leadership	3	2
SHB60118	Advanced Diploma of Intense Pulsed Light and Laser for Hair Reduction (released 11 September 2018)	Not available	24

Source: *Training.gov.au. RTOs approved to deliver this qualification. Accessed 18 May 2018.

**Accessed 26 March 2019.

The nationally recognised VET qualifications specific to

Floristry are:

- SFL20115 Certificate II in Floristry (Assistant)
- SFL30115 Certificate III in Floristry
- SFL40115 Certificate IV in Floristry
- SFL50115 Diploma of Floristry Design.

Table 2: Number of Registered Training Organisations (RTOs) by nationally recognised **Floristry** qualifications on scope – Personal Services Training Package Products

Qualification Code	Qualification Title	No. of RTOs with qualification on scope 2018*	No. of RTOs with qualification on scope 2019**
SFL20115	Certificate II in Floristry (Assistant)	23	16
SFL30115	Certificate III in Floristry	23	14
SFL40115	Certificate IV in Floristry	11	5
SFL50115	Diploma of Floristry Design	5	3

Source: *Training.gov.au. RTOs approved to deliver this qualification. Accessed 18 May 2018.

**Accessed 26 March 2019.

The nationally recognised VET qualifications specific to

Funeral Services are:

- SIF10113 Certificate I in Funeral Services
- SIF20113 Certificate II in Funeral Operations
- SIF30113 Certificate III in Cemetery and Crematorium Operations
- SIF30213 Certificate III in Gravedigging, Grounds and Maintenance
- SIF30313 Certificate III in Funeral Operations
- SIF40113 Certificate IV in Funeral Services
- SIF40213 Certificate IV in Embalming
- SIF50113 Diploma of Funeral Services Management.

Table 3: Number of Registered Training Organisations (RTOs) by nationally recognised **Funeral Service** qualifications on scope – Personal Services Training Package Products

Qualification Code	Qualification Title	No. of RTOs with qualification on scope 2018*	No. of RTOs with qualification on scope 2019**
SIF10113	Certificate I in Funeral Services	0	0
SIF20113	Certificate II in Funeral Operations	1	1
SIF30113	Certificate III in Cemetery and Crematorium Operations	2	2
SIF30213	Certificate III in Gravedigging, Grounds and Maintenance	2	2
SIF30313	Certificate III in Funeral Operations	2	2
SIF40113	Certificate IV in Funeral Services	4	4
SIF40213	Certificate IV in Embalming	3	3
SIF50113	Diploma of Funeral Services Management	0	0

Source: *Training.gov.au. RTOs approved to deliver this qualification. Accessed 18 May 2018.

** Accessed 26 March 2019

Enrolments and Completions

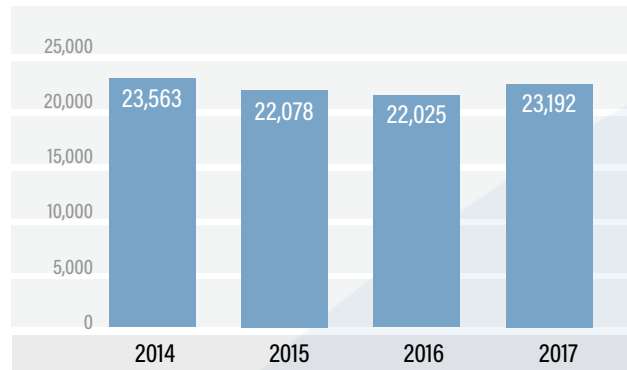
Hairdressing

In 2017, there were approximately **23,192** enrolments across all VET qualifications catered for by the Hairdressing Training Package Products (see Figure 2). This represents an increase of 5.3% (equivalent to 1,167 enrolments).

The most popular qualifications in 2017 were:

- SHB30416 Certificate III in Hairdressing (9,019 enrolments)
- SHB20216 Certificate II in Salon Assistant (4,998 enrolments).

Figure 2: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope - Hairdressing Training Package Products - 2014 to 2017



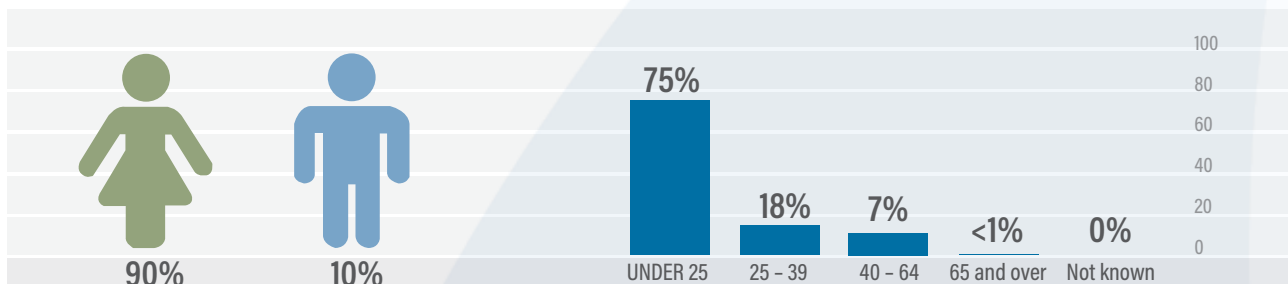
Source: NCVET VOCSTATS, accessed October 2018.

An overview of key traits of the *SHB Personal Services – Hairdressing Training Package* enrolments for 2017 is provided below.

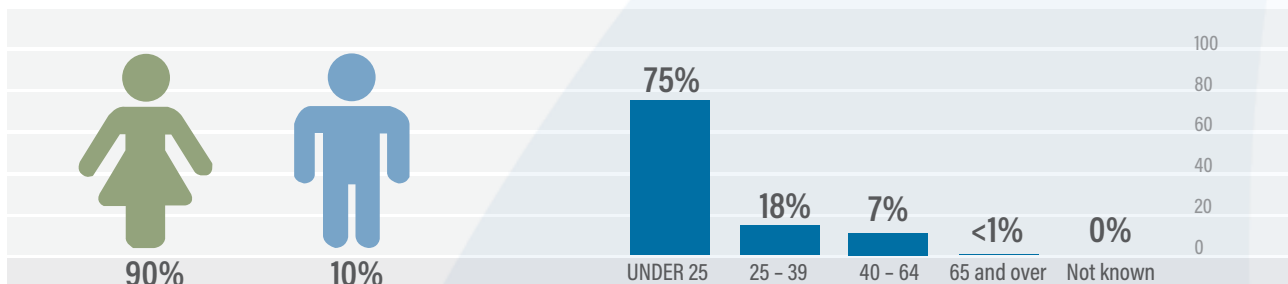
2017 ENROLMENT SNAPSHOT

HAIRDRESSING TRAINING PACKAGE PRODUCTS

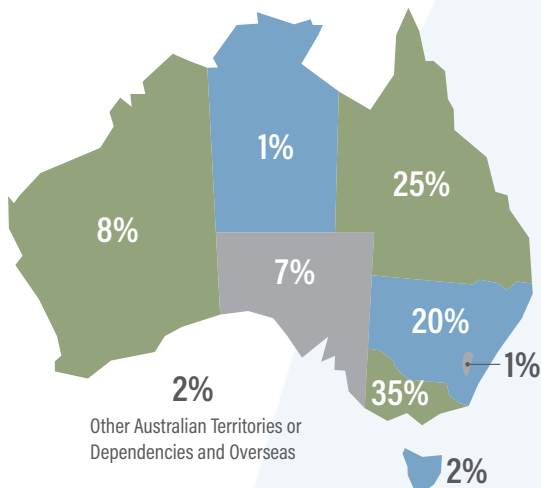
GENDER



AGE

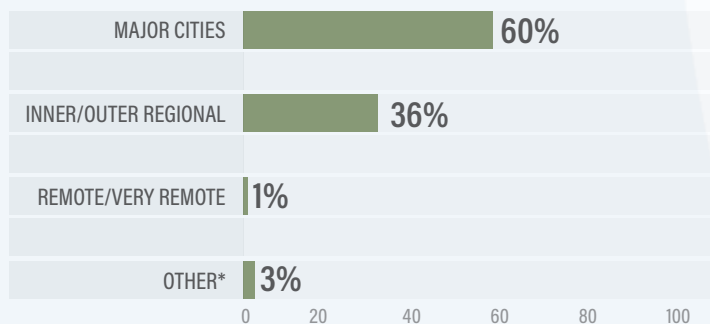


STATE/TERRITORY OF RESIDENCE



STUDENT REMOTENESS REGION

2011 Accessibility and Remoteness Index of Australia (ARIA+)



Source: NCVET VOCSTATS (Program enrolments 2017 by various breakdowns)

*Includes 'Outside Australia' and 'Not known'.

Table 4: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised **Hairdressing** qualifications on scope - 2016-2017

Qualification	2016	2017	TOTAL
<i>SIH20111 Certificate II in Hairdressing</i>	6,890	899	7,789
SHB20216 Certificate II in Salon Assistant	54	4,998	5,052
<i>SIH30111 Certificate III in Hairdressing</i>	14,034	6,778	20,812
SHB30416 Certificate III in Hairdressing	374	9,019	9,393
SHB30516 Certificate III in Barbering*	105	1,104	1,209
<i>SIH40111 Certificate IV in Hairdressing</i>	513	220	733
SHB40216 Certificate IV in Hairdressing	53	174	227
SIH70111 Vocational Graduate Certificate in Hairdressing Creative Leadership	-	-	-
<i>SIH80113 Graduate Certificate in Hairdressing Creative Leadership</i>	2	0	2
SHB80116 Graduate Certificate in Hairdressing Creative Leadership	-	-	-

Note: *New qualification in 2016.

Table 5: Total number of completions (Total VET Activity [TVA]) by nationally recognised **Hairdressing** qualifications on scope - 2016-2017

Qualification	2016	2017	TOTAL
<i>SIH20111 Certificate II in Hairdressing</i>	2,132	469	2,601
SHB20216 Certificate II in Salon Assistant	23	1,583	1,606
<i>SIH30111 Certificate III in Hairdressing</i>	3,083	2,639	5,722
SHB30416 Certificate III in Hairdressing	2	654	656
SHB30516 Certificate III in Barbering*	11	191	202
<i>SIH40111 Certificate IV in Hairdressing</i>	238	127	365
SHB40216 Certificate IV in Hairdressing	1	81	82
SIH70111 Vocational Graduate Certificate in Hairdressing Creative Leadership	-	-	-
<i>SIH80113 Graduate Certificate in Hairdressing Creative Leadership</i>	0	0	0
SHB80116 Graduate Certificate in Hairdressing Creative Leadership	-	-	-

Note: *New qualification in 2016.

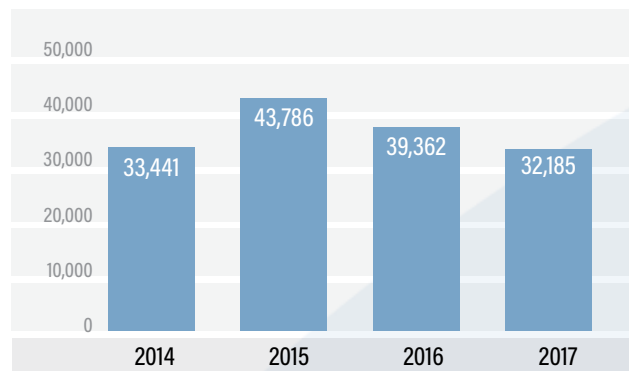
Beauty Services

In 2017, there were approximately **32,185** enrolments across all VET qualifications catered for by the Beauty Services Training Package Products (see Figure 3). This represents a decrease of 18.2% (equivalent to 7,177 enrolments).

The most popular qualifications in 2017 were:

- SHB50115 Diploma of Beauty Therapy (8,401 enrolments)
- SHB30115 Certificate III in Beauty Services (6,015 enrolments).

Figure 3: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope - Beauty Services Training Package Products - 2014 to 2017



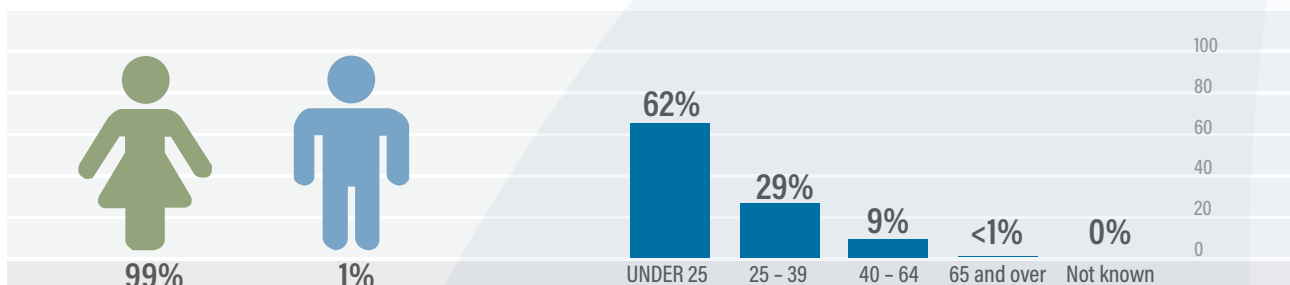
Source: NCVET VOCSTATS, accessed October 2018.

An overview of key traits of the SIH and SHB Personal Services – Beauty Services Training Package enrolments for 2017 is provided below.

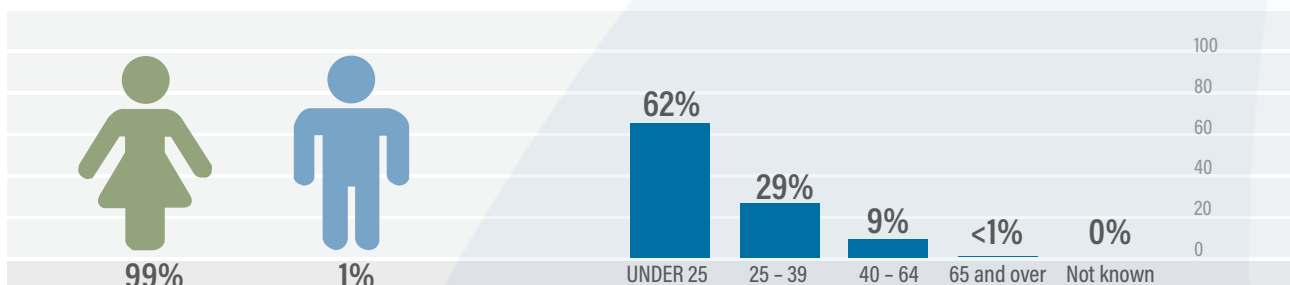
2017 ENROLMENT SNAPSHOT

BEAUTY SERVICES TRAINING PACKAGE PRODUCTS

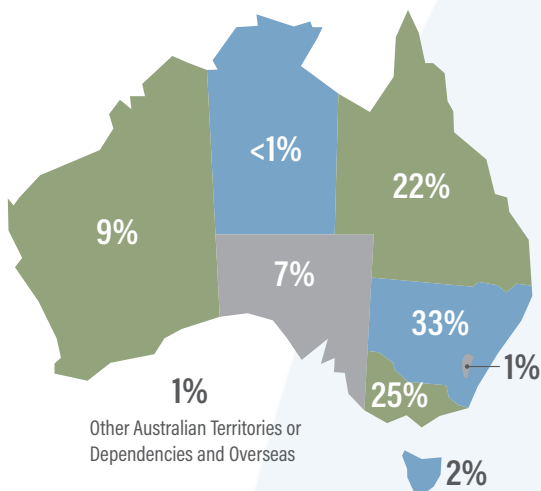
GENDER



AGE

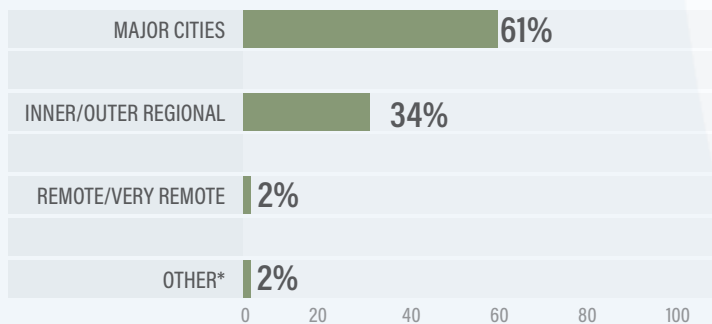


STATE/TERRITORY OF RESIDENCE



STUDENT REMOTENESS REGION

2011 Accessibility and Remoteness Index of Australia (ARIA+)



Source: NCVET VOCSTATS (Program enrolments 2017 by various breakdowns)

*Includes 'Outside Australia' and 'Not known'.

Table 6: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised **Beauty Services** qualifications* on scope - 2016–2017

Qualification	2016	2017	TOTAL
<i>SIB20110 Certificate II in Retail Make-Up and Skin Care</i>	7,002	531	7,533
SHB20116 Certificate II in Retail Cosmetics	98	3,984	4,082
<i>SIB30110 Certificate III in Beauty Services</i>	3,447	168	3,615
SHB30115 Certificate III in Beauty Services	2,705	6,015	8,720
SHB30215 Certificate III in Make-Up	1,132	3,121	4,253
<i>SIB20210 Certificate II in Nail Technology</i>	1,922	254	2,176
SHB30315 Certificate III in Nail Technology	618	1,947	2,565
<i>SIB40110 Certificate IV in Beauty Therapy</i>	1,617	278	1,895
SHB40115 Certificate IV in Beauty Therapy	910	2,135	3,045
<i>SIB50110 Diploma of Beauty Therapy</i>	12,069	3,182	15,251
SHB50115 Diploma of Beauty Therapy	5,059	8,401	13,460
<i>SIB50210 Diploma of Salon Management</i>	1,170	425	1,595
SHB50216 Diploma of Salon Management	101	414	515
<i>SIB70110 Graduate Certificate in Intense Pulsed Light and Laser Hair Reduction</i>	1,512	1,330	2,842
SHB60118 Advanced Diploma of Intense Pulsed Light and Laser for Hair Reduction	-	-	-

Note: *These qualifications were endorsed in 2015 and 2016.

Table 7: Total number of completions (Total VET Activity [TVA]) by nationally recognised **Beauty Services** qualifications* on scope - 2014–2017

Qualification	2016	2017	TOTAL
<i>SIB20110 Certificate II in Retail Make-Up and Skin Care</i>	2,573	247	2,820
SHB20116 Certificate II in Retail Cosmetics	56	1,234	1,290
<i>SIB30110 Certificate III in Beauty Services</i>	1,117	77	1,194
SHB30115 Certificate III in Beauty Services	891	1,889	2,780
SHB30215 Certificate III in Make-Up	65	790	855
<i>SIB20210 Certificate II in Nail Technology</i>	670	77	747
SHB30315 Certificate III in Nail Technology	254	705	959
<i>SIB40110 Certificate IV in Beauty Therapy</i>	540	90	630
SHB40115 Certificate IV in Beauty Therapy	115	329	444
<i>SIB50110 Diploma of Beauty Therapy</i>	2,378	380	2,758
SHB50115 Diploma of Beauty Therapy	945	2,643	3,588
<i>SIB50210 Diploma of Salon Management</i>	123	49	172
SHB50216 Diploma of Salon Management	14	66	80
<i>SIB70110 Graduate Certificate in Intense Pulsed Light and Laser Hair Reduction</i>	353	448	801
SHB60118 Advanced Diploma of Intense Pulsed Light and Laser for Hair Reduction	-	-	-

Note: *These qualifications were endorsed in 2015 and 2016.

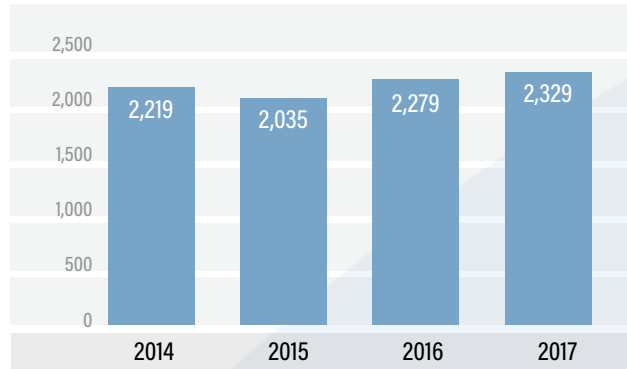
Floristry

In 2017, there were approximately **2,329** enrolments across all VET qualifications catered for by the Floristry Training Package Products (see Figure 4). This represents an increase of 2.2% (equivalent to 50 enrolments).

The most popular qualifications in 2017 were:

- SFL30115 Certificate III in Floristry (1,818 enrolments)
- SFL20115 Certificate II in Floristry (Assistant) (267 enrolments).

Figure 4: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope - Floristry Training Package Products - 2014 to 2017



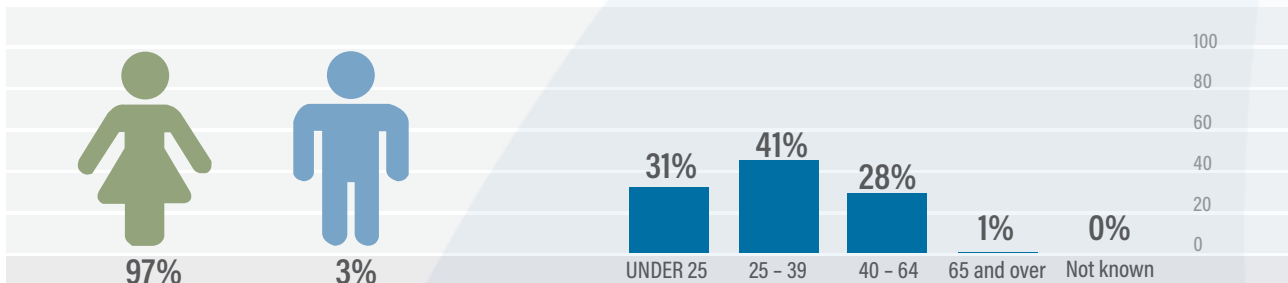
Source: NCVET VOCSTATS, accessed October 2018.

An overview of key traits of the *SFL Personal Services – Floristry Training Package* enrolments for 2017 is provided below.

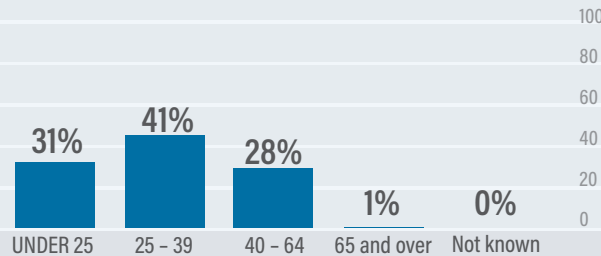
2017 ENROLMENT SNAPSHOT

FLORISTRY TRAINING PACKAGE PRODUCTS

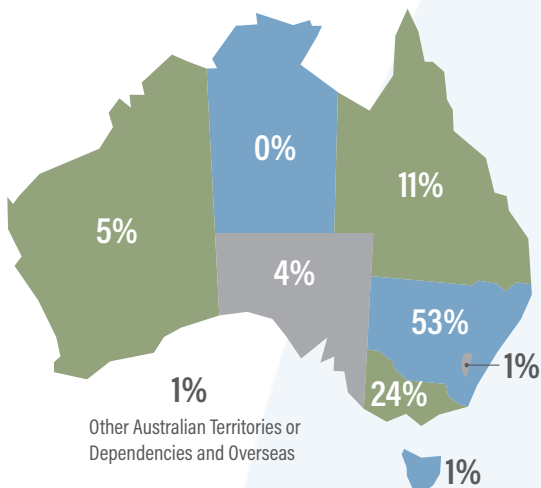
GENDER



AGE

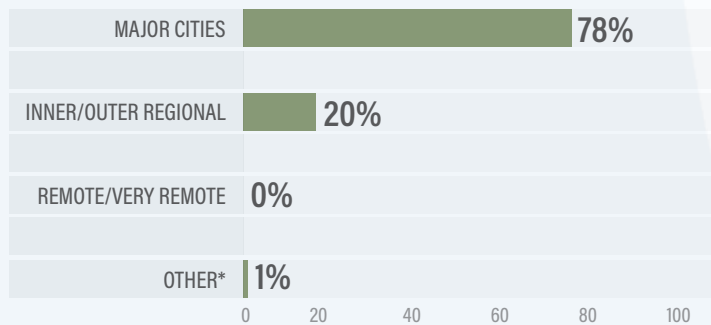


STATE/TERRITORY OF RESIDENCE



STUDENT REMOTENESS REGION

2011 Accessibility and Remoteness Index of Australia (ARIA+)



Source: NCVET VOCSTATS (Program enrolments 2017 by various breakdowns)

*Includes 'Outside Australia' and 'Not known'.

Table 8: Total number of enrolments (Total VET Activity, [TVA]) by nationally recognised **Floristry** qualifications* on scope - 2016-2017

Qualification	2016	2017	TOTAL
<i>SFL20110 Certificate II in Floristry (Assistant)</i>	174	5	179
SFL20115 Certificate II in Floristry (Assistant)	237	267	504
<i>SFL30110 Certificate III in Floristry</i>	894	179	1,073
SFL30115 Certificate III in Floristry	881	1,818	2,699
<i>SFL40110 Certificate IV in Floristry</i>	25	8	33
SFL40115 Certificate IV in Floristry	68	51	119
<i>SFL50110 Diploma of Floristry Design</i>	0	0	0
SFL50115 Diploma of Floristry Design	0	1	1

Note: *These qualifications were endorsed in 2015.

Table 9: Total number of completions (Total VET Activity [TVA]) by nationally recognised **Floristry** qualifications* on scope - 2016-2017

Qualification	2016	2017	TOTAL
<i>SFL20110 Certificate II in Floristry (Assistant)</i>	110	3	113
SFL20115 Certificate II in Floristry (Assistant)	112	147	259
<i>SFL30110 Certificate III in Floristry</i>	405	64	469
SFL30115 Certificate III in Floristry	181	588	769
<i>SFL40110 Certificate IV in Floristry</i>	9	2	11
SFL40115 Certificate IV in Floristry	34	12	46
<i>SFL50110 Diploma of Floristry Design</i>	2	0	2
SFL50115 Diploma of Floristry Design	-	-	-

Note: *These qualifications were endorsed in 2015.

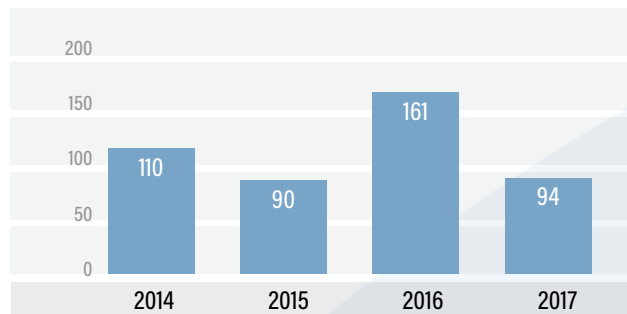
Funeral Services

In 2017, there were approximately **94** enrolments across all VET qualifications catered for by the Funeral Services Training Package Products (see Figure 5). This represents a decrease of 41.6% (equivalent to 67 enrolments).

The most popular qualifications in 2017 were:

- SIF30213 Certificate III in Gravedigging, Grounds and Maintenance (43 enrolments)
- SIF40213 Certificate IV in Embalming (30 enrolments).

Figure 5: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope - Funeral Service Training Package Products - 2014 to 2017



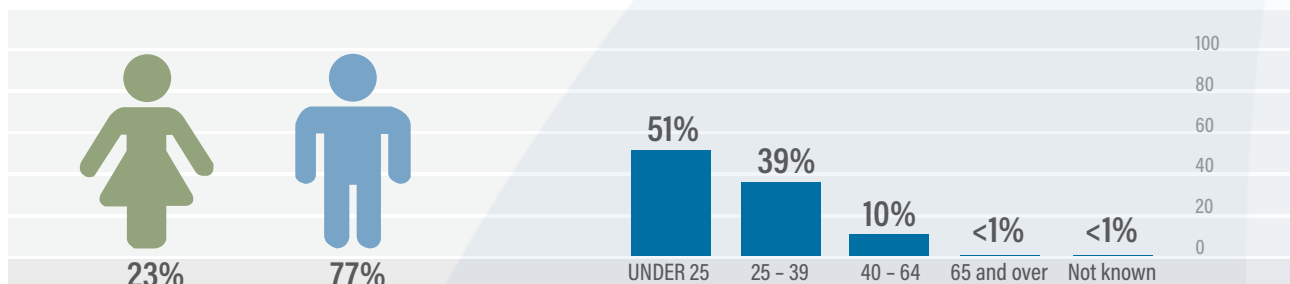
Source: NCVET VOCSTATS, accessed October 2018.

An overview of key traits of the *SIF Personal Services – Funeral Services Training Package* enrolments for 2017 is provided below.

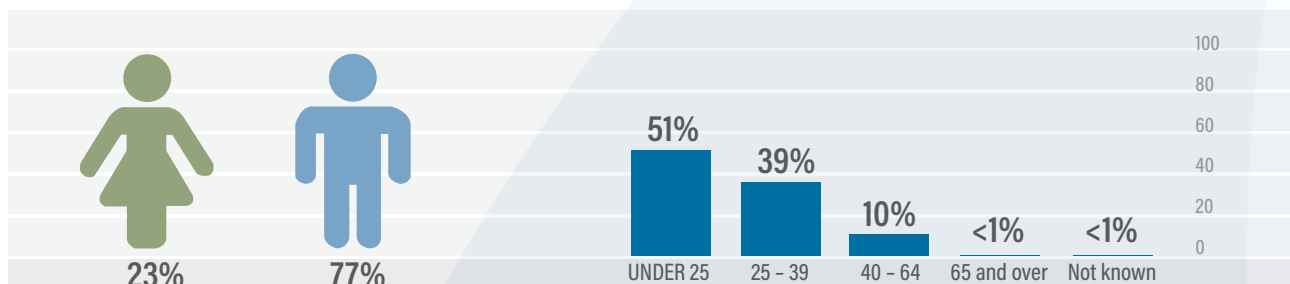
2017 ENROLMENT SNAPSHOT

FUNERAL SERVICE TRAINING PACKAGE PRODUCTS

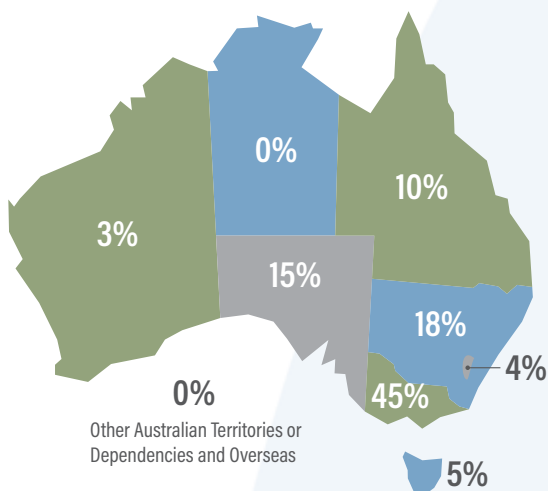
GENDER



AGE

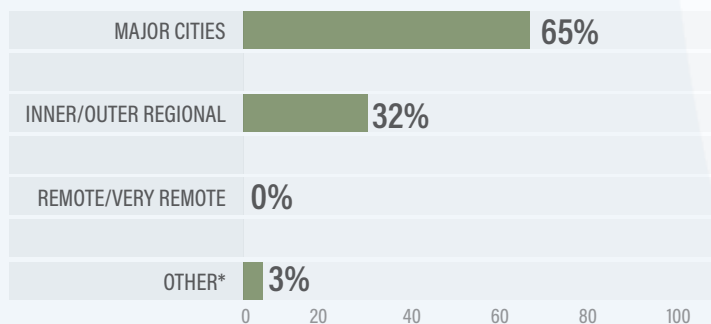


STATE/TERRITORY OF RESIDENCE



STUDENT REMOTENESS REGION

2011 Accessibility and Remoteness Index of Australia (ARIA+)



Source: NCVET VOCSTATS (Program enrolments 2017 by various breakdowns)

*Includes 'Outside Australia' and 'Not known'.

Table 10: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised **Funeral Services** qualifications* on scope – 2016–2017

Qualification	2016	2017	TOTAL
SIF10113 Certificate I in Funeral Services	-	-	-
SIF20113 Certificate II in Funeral Operations	0	0	0
SIF30113 Certificate III in Cemetery and Crematorium Operations	9	0	9
SIF30213 Certificate III in Gravedigging, Grounds and Maintenance	103	43	146
SIF30313 Certificate III in Funeral Operations	12	11	23
<i>SIF40108 Certificate IV in Funeral Services</i>	<i>0</i>	<i>0</i>	<i>0</i>
SIF40113 Certificate IV in Funeral Services	0	0	0
<i>SIF40208 Certificate IV in Embalming</i>	<i>17</i>	<i>10</i>	<i>27</i>
SIF40213 Certificate IV in Embalming	20	30	50
SIF50113 Diploma of Funeral Services Management	-	-	-

Note: These qualifications were endorsed in 2013.

Table 11: Total number of completions (Total VET Activity [TVA]) by nationally recognised **Funeral Services** qualifications* on scope - 2016–2017

Qualification	2016	2017	TOTAL
SIF10113 Certificate I in Funeral Services	-	-	-
SIF20113 Certificate II in Funeral Operations	0	0	0
SIF30113 Certificate III in Cemetery and Crematorium Operations	7	0	7
SIF30213 Certificate III in Gravedigging, Grounds and Maintenance	6	37	43
SIF30313 Certificate III in Funeral Operations	8	2	10
<i>SIF40108 Certificate IV in Funeral Services</i>	<i>-</i>	<i>-</i>	<i>-</i>
SIF40113 Certificate IV in Funeral Services	-	-	-
<i>SIF40208 Certificate IV in Embalming</i>	<i>5</i>	<i>2</i>	<i>7</i>
SIF40213 Certificate IV in Embalming	2	5	7
SIF50113 Diploma of Funeral Services Management	-	-	-

Note: These qualifications were endorsed in 2013.

A.2 Employment and Skills Outlook Overview

Employment – Current and Projected

Note: The principal data source that provides workforce data and trends regarding roles of relevance to this Training Package at a national level is Census data collected by the Australian Bureau of Statistics (ABS) and the Department of Jobs and Small Business. The workforce statistics and projections presented in this section are based on Census collections and are reported according to prescribed Australian and New Zealand Standard Industrial Classification (ANZSIC) and Australian and New Zealand Standard Classification of Occupations classifications (ANZSCO).

The current definitions, and the labelling used for some ANZSIC and ANZSCO codes, as well as the aggregation of roles across codes, can be limited in providing a true picture of some sectors' workforces. Sectors can host a multitude of job functions, and

consequently comprise job titles which go beyond the categories listed in ANZSCO. The statistics in this section are provided as an indicative overview of the sector only.

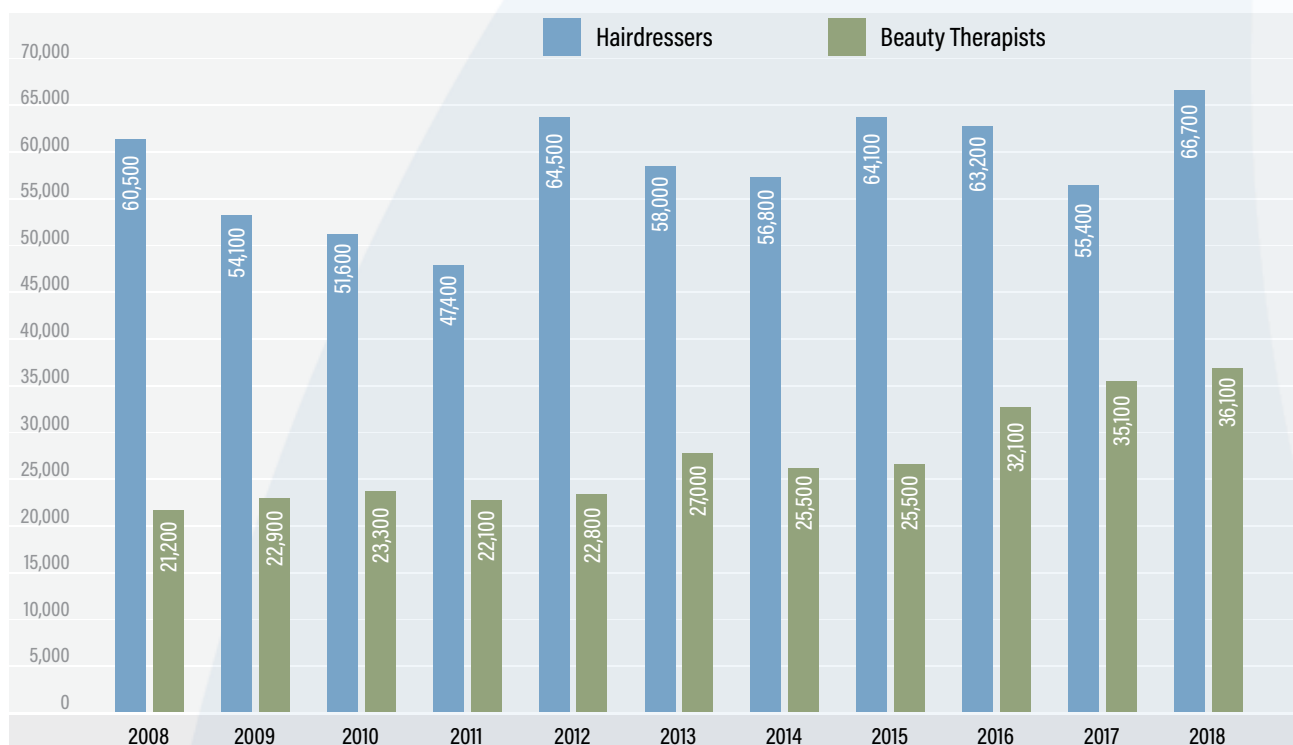
Job roles covered by the Personal Services Training Package Products are captured across the following ANZSCO categories:

- ANZSCO 3911 **Hairdressers**
- ANZSCO 4511 **Beauty Therapists**
- ANZSCO 3621 **Florists**
- ANZSCO 4513 **Funeral Workers** – representing in aggregate Funeral Director, Mortician, or Undertaker and Other Funeral Workers.

Hairdressing and Beauty Services

Over the past five years, the Hairdressing and Beauty Services industry has experienced an average of 0.8% year-on-year growth.¹² The steady growth in the sector can be seen by the steady levels of employment for Hairdressers and Beauty Therapists from 2008 to 2018 (see Figure 6).

Figure 6: Employment level of Hairdressers and Beauty Therapists - 2008 to 2018



Source: Department of Jobs and Small Business, Hairdressers ANZSCO 3911 and Beauty Therapists ANZSCO 4511, accessed 13 December 2018



Table 12: Workforce traits of selected occupations supported by the Personal Services – **Hairdressing and Beauty Services** Training Package (2017)

Traits	Average age	Gender - female	Full-time employment	Location	
Hairdressers	35 years (National average 40 years)	83.9% (National average 46.7%)	56.7% (National average 68.4%)	NSW – 27.6% VIC – 24.6% QLD – 21.6% SA – 7.6%	WA – 14.0% TAS – 2.7% NT – 0.6% ACT – 1.3%
Beauty Therapists	32 years (National average 40 years)	95.5% (National average 46.7%)	44.7% (National average 68.4%)	NSW – 38.6% VIC – 21.8% QLD – 19.1% SA – 6.3%	WA – 10.7% TAS – 1.0% NT – 1.5% ACT – 1.0%

Source: Department of Jobs and Small Business – Job Outlook, Hairdressers ANZSCO 3911 and Beauty Therapists ANZSCO 4511, accessed 26 March 2019

Florists

The latest national employment data figures show that in 2018, there were approximately 7,800 Florists in Australia. The pattern of employment levels has varied over the last ten years (see Figure 7).

Figure 7: Employment level of Florists - 2008 to 2018



Source: Department of Jobs and Small Business, Florists ANZSCO 3621, accessed 13 December 2018

Note: Employment levels from Department of Jobs and Small Business – Job Outlook are derived from the ABS Labour Force Survey. As the Labour Force Survey is a survey, it is therefore subject to sampling error and can produce variable results, particularly in smaller occupations or when looking at data at a more granular level.

Table 13: Workforce traits of selected occupation supported by the Personal Services – **Floristry** Training Package (2017)

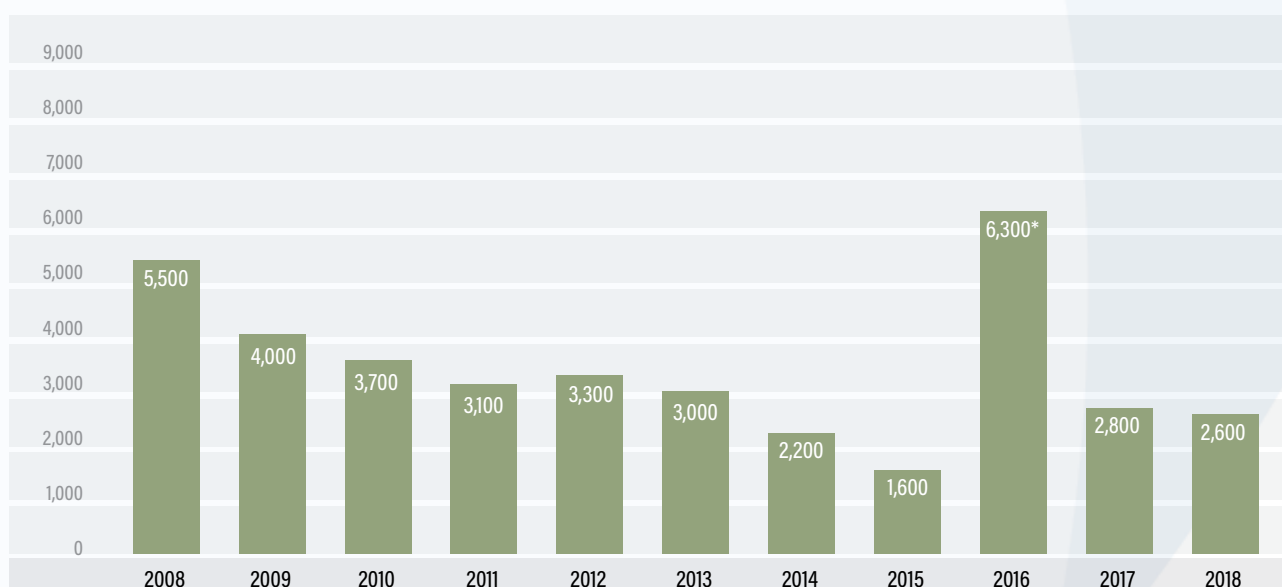
Traits	Average age	Gender - female	Full-time employment	Location	
Florists	43 years (National average 40 years)	77.7% (National average 46.7%)	64.7% (National average 68.4%)	NSW – 31.2% VIC – 28.4% QLD – 11.9% SA – 13.6%	WA – 10.9% TAS – 0.6% NT – 0.3% ACT – 3.2%

Source: Department of Jobs and Small Business – Job Outlook, Florists ANZSCO 3621, accessed 26 March 2019

Funeral Workers

The Funeral industry has experienced steady growth over the past five years, at an average annual rate of 3.2%.¹³ Despite this recent industry growth, overall employment levels have decreased by more than two-fold from 2008 to 2018 (see Figure 8).

Figure 8: Employment level of Funeral Workers - 2008 to 2018



Source: Department of Jobs and Small Business, Funeral Workers ANZSCO 4513, accessed 13 December 2018

* Employment levels from Department of Jobs and Small Business – Job Outlook are derived from the ABS Labour Force Survey. As the Labour Force Survey is a survey, it is therefore subject to sampling error and can produce variable results, particularly in smaller occupations or when looking at data at a more granular level.

Table 14: Workforce traits of selected occupation supported by the Personal Services – **Funeral Services** Training Package (2017)

Traits	Average age	Gender - female	Full-time employment	Location	
Funeral Worker	53 years (National average 40 years)	27.5% (National average 46.7%)	75.7% (National average 68.4%)	NSW – 44.4% VIC – 22.5% QLD – 10.9% SA – 12.5%	WA – 0.0%* TAS – 4.7% NT – 1.0% ACT – 4.1%

Source: Department of Jobs and Small Business – Job Outlook, Funeral Workers ANZSCO 4513, accessed 26 March 2019

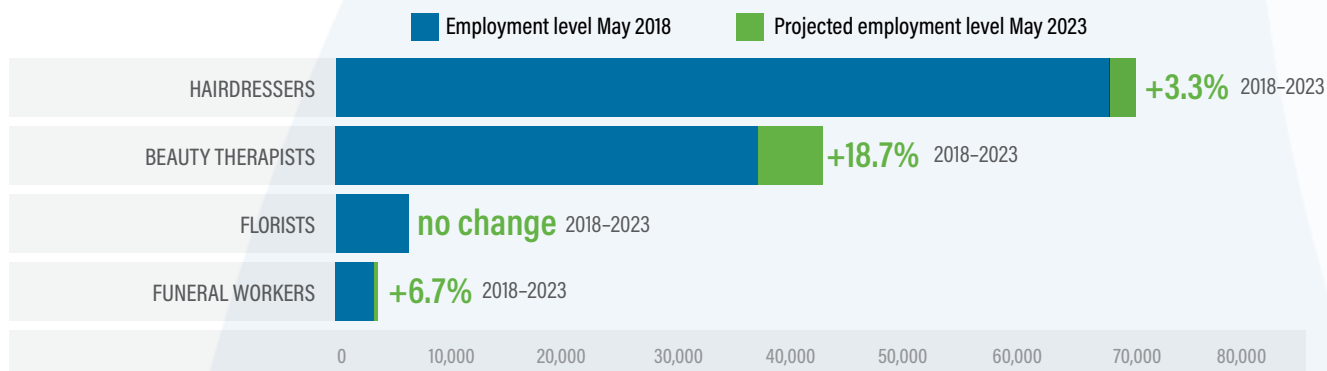
* Employment levels from Department of Jobs and Small Business – Job Outlook are derived from the ABS Labour Force Survey. As the Labour Force Survey is a survey, it is therefore subject to sampling error and can produce variable results, particularly in smaller occupations or when looking at data at a more granular level.



Overall, the **Personal Service sectors are expected to experience growth over the next five years.** Notably, Online Flower Retailers will experience the strongest growth in the sector at 7.1% average annual growth rates.¹⁴ In comparison, traditional Retail Flower stores are expected to experience significantly less growth over the next five years, at an average annual growth rate of 0.2%.¹⁵ Hairdressing and Beauty Services and Funeral Services are predicted to experience steady average annual growth rates of 2.6%¹⁶ and 2.5%¹⁷ respectively.

Beauty Therapist jobs are forecasted to experience very strong growth from 2018-2023, at a rate of 18.7% to 42,800 jobs.¹⁸ Funeral Worker and Hairdressing jobs are expected to experience moderate growth over the next five years, at a rate of 6.7% and 3.3% respectively (see Figure 9).¹⁹ Florist jobs are not expected to experience significant job growth.²⁰

Figure 9: Employment levels (May 2018 and May 2023) and forecasted % growth to May 2023 for selected occupations in Personal Services



Source: Department of Jobs and Small Business (2018) 2018 Occupational projections – five years to May 2023, accessed 13 December 2018

Future Skills

Note: These findings are based on desk research as well as SkillsIQ's *2019 Future Skills Survey* (conducted between November 2018 and January 2019) which have been filtered to include stakeholders from the Personal Services sectors only. Insights and advice from IRC members and public consultation have also been used to compile and validate the information provided.

The work environment across all industries is continuously evolving to adapt to external and internal industry trends. Technology, automation, Artificial Intelligence (AI),

globalisation, an ageing population, shifts in workforce demographics and industry (i.e. the transition from manufacturing and production to a largely service-based economy)²¹ are just some of the ongoing trends driving change.

The Personal Services sectors, like others, have been impacted by these trends and, as a result, so too have the skills needs of the workforce. Whilst technical skills to perform job tasks are imperative, employers in the short-to-medium future will be looking beyond these and have indicated that it will be important for workers in their organisation to be **equipped with key 'soft skills'**:



TEAMWORK AND
COMMUNICATION



EMOTIONAL
INTELLIGENCE



RESILIENCE, STRESS
TOLERANCE AND
FLEXIBILITY



SELF-
MANAGEMENT



CREATIVITY

These results are in line with wider studies, including the World Economic Forum and its *Future of Jobs Survey 2018*, which indicate that the top skills in demand in 2022 will include **analytical thinking** and **innovation, creativity, originality** and **initiative, critical thinking, complex problem-solving, leadership** and **emotional intelligence**.²²

The VET system plays a pivotal role in supporting employers and employees to adapt to technologies and changes in the workplace. Its role in skilling the workforce with current and emerging skills will only grow more strongly in the future as it continues to support individuals entering the workplace or transitioning into different roles.²³

The 12 generic skills listed below, including the descriptors, were provided by the Department of Education and Training for the purpose of being ranked by industry representatives. For the 2019 ranking exercise, an 'Other' generic skill option was included in the list to capture any additional key skills considered important for an industry. Please note that, in this case, no other generic skills were identified.

Key Generic Skills – Ranked in Order of Importance

1	Customer service / Marketing - Ability to interact with other human beings, whether helping them find, choose or buy something. Ability to supply customers' wants and needs both via face-to-face interactions or digital technology. Ability to manage online sales and marketing. Ability to understand and manage digital products.
2	Communication / Collaboration including virtual collaboration / Social intelligence - Ability to understand and apply the principles of creating more value for customers with fewer resources (lean manufacturing) and collaborative skills. Ability to critically assess and develop content that uses new media forms and leverage these media for persuasive communications. Ability to connect to others in a deep and direct way, to sense and stimulate reactions and desired interactions.
3	Design mindset / Thinking critically / System thinking / Solving problems - Ability to adapt products to rapidly shifting consumer tastes and trends. Ability to determine the deeper meaning or significance of what is being expressed via technology. Ability to understand how things that are regarded as systems influence one another within a complete entity, or larger system. Ability to think holistically.
4	Learning agility / Information literacy / Intellectual autonomy and self-management - Ability to identify a need for information. Ability to identify, locate, evaluate, and effectively use and cite the information. Ability to discriminate and filter information for importance. Ability to do more with less. Ability to quickly develop a working knowledge of new systems to fulfil the expectations of a job.
5	Language, Literacy and Numeracy (LLN) - Foundation skills of literacy and numeracy.
6	Managerial / Leadership - Ability to effectively communicate with all functional areas in the organisation. Ability to represent and develop tasks and work processes for desired outcomes. Ability to oversee processes, guide initiatives and steer employees toward achievement of goals.
7	Technology use and application skills - Ability to create and/or use technical means, understand their interrelation with life, society, and the environment. Ability to understand and apply scientific or industrial processes, inventions, methods, etc. Ability to deal with increasing mechanisation and automation and computerisation. Ability to do work from mobile devices rather than from paper.
8	Environmental and Sustainability - Ability to focus on problem solving and the development of applied solutions to environmental issues and resource pressures at local, national and international levels.
9	Financial - Ability to understand and apply core financial literacy concepts and metrics, streamlining processes such as budgeting, forecasting, and reporting, and stepping up compliance. Ability to manage costs and resources, and drive efficiency.
10	Entrepreneurial - Ability to take any idea, whether it be a product and/or service, and turn that concept into reality and not only bring it to market, but make it a viable product and/or service. Ability to focus on the very next step to get closer to the ultimate goal.
11	Science, Technology, Engineering and Maths (STEM) - Sciences, mathematics and scientific literacy.
12	Data analysis skills - Ability to translate vast amounts of data into abstract concepts and understand data-based reasoning. Ability to use data effectively to improve programs, processes and business outcomes. Ability to work with large amounts of data: facts, figures, number crunching, analysing results.



A.3 Key Drivers for Change and Proposed Responses Overview

Key Drivers

As noted previously in this document, there are a number of different Training Packages and Training Package Products within the remit of the Personal Services IRC.

Current Work in Progress

The Beauty Training Package Products are currently being updated with an additional two specific areas of focus for new qualifications:

- Cosmetic Tattooing
- Skin Rejuvenation Treatments.

Future Work

The remaining Training Package Products under the remit of this IRC were initially scheduled for review in 2019–2020. However, broader consultation with industry did not identify any significant or critical skills gaps that required action in the current year. Additionally, industry noted that it is vital to allow for the proper implementation

and use of the Training Package Products which came into effect in July and September 2015 (Funerals and Floristry) and March 2016 (Hairdressing). These Products were extensively reviewed prior to being released. As a result, there is no new Training Package development work proposed for these qualifications in 2019–2020. They are instead proposed for review in 2020–2021.

A.4 Consultation Undertaken

A widespread **multi-channel consultation** involving the following stakeholders has been conducted to identify and substantiate the key skills gaps and training needs of the sector, and to determine whether or not there is a need to update the respective Training Package Products:

- All Personal Services Industry Reference Committee (IRC) members representing the following key bodies:
 - Alstonville Florist
 - Australian Association of Floral Designers
 - Australian Funeral Directors Association
 - Australian Hairdressing Council
 - Australian Workers' Union
 - Hair and Beauty Australia
 - Hairdressing and Beauty Industry Association
 - Retail and Personal Services Skills Advisory Council
 - Shop Distributive and Allied Employees Association
 - Stephanie's Luxury Spas.
- Networks of the Personal Services IRC members
- A national online survey distributed via the SkillsIQ database between November 2018 and January 2019 that sought to identify top skills needs and priority industry issues
- Public consultation on the draft Industry Skills Forecast, which was publicised by e-mail to over 17,000 stakeholders registered in SkillsIQ's database network
- The Industry Skills Forecast, including the Proposed Schedule of Work, which was promoted to stakeholders and made available via SkillsIQ's website.

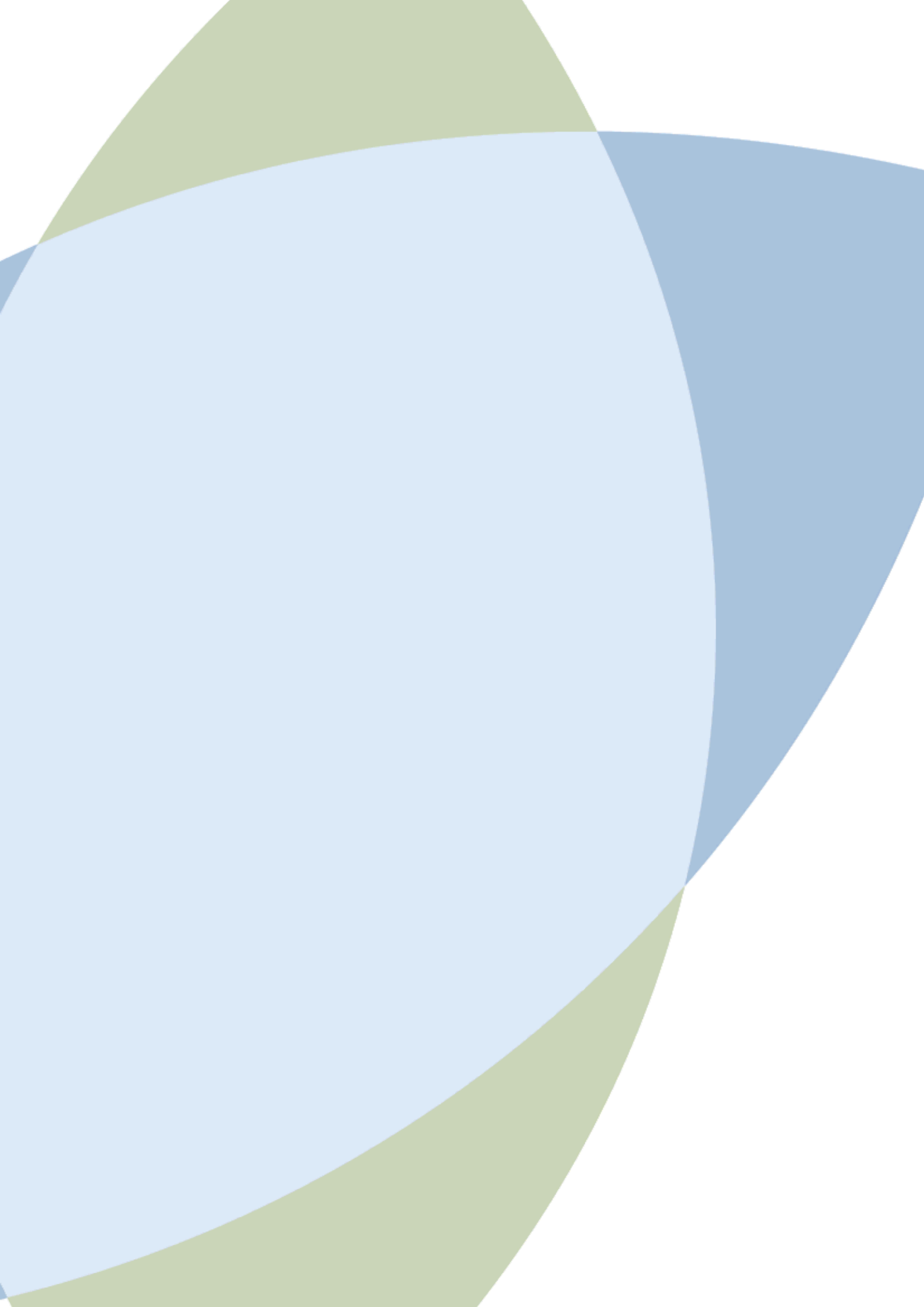
B. Proposed Schedule of Work

2020–21

YEAR	PROJECT TITLE AND DESCRIPTOR
2020–21	<p>Hairdressing and Barbering</p> <p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to Hairdressing and Barbering job roles:</p> <ul style="list-style-type: none"> • SHB20216 Certificate II in Salon Assistant • SHB30416 Certificate III in Hairdressing • SHB30516 Certificate III in Barbering • SHB40216 Certificate IV in Hairdressing • SHB50216 Diploma of Salon Management • SHB80116 Graduate Certificate in Hairdressing Creative Leadership <p>This would include the development of a new Unit relating to the safe use of chemicals for hairdressing services.</p>
2020–21	<p>Floristry</p> <p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to Floristry job roles:</p> <ul style="list-style-type: none"> • SFL20115 Certificate II in Floristry (Assistant) • SFL30115 Certificate III in Floristry • SFL40115 Certificate IV in Floristry • SFL50115 Diploma of Floristry Design
2020–21	<p>Funeral Services</p> <p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to Funeral Services job roles:</p> <ul style="list-style-type: none"> • SIF10113 Certificate I in Funeral Services • SIF20113 Certificate II in Funeral Operations • SIF30113 Certificate III in Cemetery and Crematorium Operations • SIF30213 Certificate III in Gravedigging, Grounds and Maintenance • SIF30313 Certificate III in Funeral Operations • SIF40113 Certificate IV in Funeral Services • SIF40213 Certificate IV in Embalming • SIF50113 Diploma of Funeral Services Management

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- 2 Department of Jobs and Small Business (2019) *Trend data and Projections* [Available at: <http://lmip.gov.au/default.aspx?LMIP/Downloads/InteractiveDataFiles>] [Accessed 5 April 2019] Note: Personal and Other Services includes hairdressing, beauty services and diet and weight reduction centre operations.
- 3 IBISWorld (2019) *Industry Report G4274 Flower Retailing in Australia* (March 2019)
- 4 IBISWorld (2019) *Industry Report OD4173 Online Flower Shops in Australia* (February 2019)
- 5 IBISWorld (2018) *Industry Report S9520 Funeral Directors, Crematoria and Cemeteries in Australia* (October 2018)
- 6 IBISWorld (2018) *Industry Report S9520 Funeral Directors, Crematoria and Cemeteries in Australia* (October 2018)
- 7 Various IBISWorld Industry reports - *Industry Report S9511 Hairdressing and Beauty Services in Australia (August 2018)*, *Industry Report G4274 Flower Retailing in Australia (March 2019)*, *Industry Report OD4173 Online Flower Shops in Australia (February 2019)*, *Industry Report S9520 Funeral Directors, Crematoria and Cemeteries in Australia (October 2018)*
- 8 NCVET (2018) *Completion and attrition rates for apprentices and trainees 2017* [Available at: https://www.ncver.edu.au/_data/assets/pdf_file/0023/2903315/Completion-and-attrition-rates-for-apprentices-and-trainees-2017-publication.pdf] [Accessed 2 April 2019]
- 9 Australian Government Australian Apprenticeships (2015) *Employer Responsibilities* [Available at: <https://www.australianapprenticeships.gov.au/employer-responsibilities>] [Accessed 2 April 2019]
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- 11 Carlyon, P. (2018) *Hairdresser shortage in Tasmania cuts deep, with little protection from 'walk-in' amateurs* [Available at: <https://www.abc.net.au/news/2018-06-10/hairdresser-shortage-tasmania-prompts-melbourne-recruitment/9854922>] [Accessed 2 April 2019]
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- 13 IBISWorld (2018) *Industry Report S9520 Funeral Directors, Crematoria and Cemeteries in Australia* (October 2018)
- 14 IBISWorld (2019) *Industry Report OD4173 Online Flower Shops in Australia* (February 2019)
- 15 IBISWorld (2019) *Industry Report G4274 Flower Retailing in Australia* (March 2019)
- 16 IBISWorld (2018) *Industry Report S9511 Hairdressing and Beauty Services in Australia* (August 2018)
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- 19 Department of Jobs and Small Business, ANZSCO 3911 *Hairdressers* [Available at: <https://joboutlook.gov.au/Occupation.aspx?search=Career&code=3911>] [Accessed 13 December 2018] Department of Jobs and Small Business, ANZSCO 4513 *Funeral Workers* [Available at: <https://joboutlook.gov.au/Occupation.aspx?search=Career&code=4513>] [Accessed 13 December 2018]
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- 22 World Economic Forum (2018) *The Future of Jobs Report 2018*, Centre for the New Economy Society, Switzerland [Available at: http://www3.weforum.org/docs/WEF_Future_of_Jobs_2018.pdf]
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STAKEHOLDERS



OUTCOMES



INTEGRITY



BOLDNESS



TEAMWORK



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