Tourism, Travel & Hospitality Workforce Development Strategy
2014-2019

SERVICE SKILLS AUSTRALIA

Contents

Foreword

The tourism, travel and hospitality industry continues to experience a critical shortage of qualified and skilled labour. Employment forecasts of future workforce needs strongly indicate that this pattern will continue. As the industry continues to grow, strategic planning is required to enable businesses to access appropriately-skilled staff in requisite numbers to ensure operations remain productive, sustainable and are able to meet rising consumer expectations.

In order to succeed, the industry must work together to create and promote the plethora of possible career pathways, making it a career of choice for people of various cohorts. Attracting, skilling and retaining people from a range of labour sources into quality workplace environments will empower the industry to meet its potential and maximise upon the opportunities that the growing demand for our products provide.

This reviewed and updated workforce development strategy builds upon the achievements of the previous version and continues to address the labour and skills shortages in the tourism, travel and hospitality industry. The document was developed in collaboration with the industry and represents a united vision for future workforce development activities. The strategy contains four key focus areas—or pillars—underpinned by a series of actions that will strengthen the position of the industry as a whole. These are:

- Labour supply (that businesses in the industry have access to appropriately-skilled people in the requisite numbers)
- Building capability (increasing productivity through improving skills, leadership and management)
- Quality Issues (measures to increase the quality of skills outcomes through improving the quality of delivery and assessment)
- Need for data (the development of a strong evidence base to continue the workforce planning process)

Through addressing these areas, the tourism, travel and hospitality industry will be more strongly equipped to achieve the targets for the employment of skilled people and will ensure that our industry continues its pattern of prolonged growth.

John Hart and John Sweetman
Chair and Deputy Chair of the Tourism,
Travel and Hospitality Industry Advisory Committee

Message from Service Skills Australia

Service Skills Australia is proud to present the second iteration of the Tourism, Travel and Hospitality Workforce Development Strategy.

This strategy has been developed through consultation with industry stakeholders in each state and territory and outlines a series of focus areas and activities that will assist the industry in addressing its workforce development challenges. The goals of the strategy were validated nationally and led to the key focus areas of the strategy being refined to reflect the context in which businesses are now operating.

The intervening years between the publication of the previous strategy and this one have seen advancement in the understanding of what workforce development encompasses. Whereas a training response had previously been seen as the primary solution for addressing workforce development challenges, this strategy embraces workforce development at its broadest level, including a range of themes, such as structural adjustment and job redesign. It also takes into account the external factors that impact upon workforce planning.

A feature that remains consistent with the previous strategy is that it has been developed by industry, for industry. By working together—and in conjunction with Service Skills Australia—the industry is in a stronger position to overcome its challenges and access the people that will allow it to further thrive.

Jeanette Allen
Chief Executive Officer, Service Skills Australia

Baggage Claim

Executive summary

The tourism, travel and hospitality industry continues to experience growth and change. With visitor numbers to Australia continuing to expand into new markets, it is crucial that the workforce is suitably skilled and committed, in order to provide appropriate service to meet the demands of all aspects of consumer need.

Total Domestic Tourism Expenditure is forecast to increase by 2.5 per cent to $71 billion in 2012-13 and by a further 1.4 per cent to $72 billion in 2013-14. Total Domestic Tourism Expenditure is now expected to grow at an average annual rate of 1.1 per cent to $77 billion by 2021-22.

Total Inbound Tourism Expenditure is expected to increase 5.4 per cent to $29 billion in 2012-13, and then by 5.9 per cent to $30 billion in 2013-14. Total Inbound Tourism Expenditure is forecast to grow at an average annual rate of 3.8 per cent to $40 billion by 2021-22.

Domestic visitor nights are forecast to grow moderately in the short to medium term, with long-term growth being revised up from 0.8 per cent to 1.0 per cent, meaning that domestic visitor nights are now forecast to reach 307 million by 2021-22. Furthermore, inbound arrivals are forecast to gain more momentum in the coming years. The long-term outlook has been upgraded with an annual growth rate of 3.5 per cent. The forecasts show that 8.4 million arrivals are expected by 2021-22.[1]

The café, restaurant and takeaway sector is expected to experience phenomenal growth in the next five years; this will be driven by a strong domestic demand and a growing tourism base. Turnover in cafés, restaurants and takeaway food establishments totaled $34.314 billion over 2012, representing an increase of 6.7 per cent on the turnover generated in 2011.[2] This growth is also evident in the 2009-10 ABS Household Expenditure Survey, in which the level spent on meals in restaurants, hotels and clubs increased 68 per cent compared with 2003-04.[3]

The Department of Education, Employment and Workplace Relations (DEEWR) forecasts employment growth in this sector to exceed any other in the Australian economy, with growth of 42,700 or an increase of 8.1 per cent expected.[4]

The tourism industry has a labour shortage of 36,000 people and an employee vacancy rate of over four times the national average, which prevents parts of the industry from providing an effective service to global customers. By 2015, at least an additional 56,000 – 152,000 people will be required to fill vacancies (including 26,000 skilled positions).[5] This forecast ranges from the most conservative estimate for industry growth to the highest estimate. Given that labour supply has dropped, it is anticipated that vacancy rates will sit towards the higher end of the scale.

The recruitment challenges faced by the industry will be exacerbated by the drop in qualification enrolment numbers experienced in recent years. This is particularly evident at the Certificate II level for Hospitality, where enrolments have dropped from almost 62,000 people in 2008 to just over 37,200 in 2012.[6] It is reasonable to expect that this fall in enrolment numbers will result in a reduced number of course completions. Low completion rates for Tourism, Travel and Hospitality qualifications have long been a concern for the industry, but it has worked to improve the situation by working collaboratively with the Vocational Education and Training (VET) system through mentoring programs and initiatives to promote the career opportunities available.

The reality of the tourism, travel and hospitality industry is that the vast number of job roles that are currently and will continue to be required, cannot be filled through local sources alone. The use of overseas workers remains a vital source of employment for the industry and must be balanced and based on established need.

In 2008, the tourism, travel and hospitality industry devised a workforce development strategy that presented a clear vision for accessing and developing an appropriately-skilled workforce. The strategy presented a framework to address labour and skills shortages in order to continue its pattern of strong growth. The workforce development strategy became the launch pad for future activities to address labour and skills needs at a national, regional and enterprise level. The strategy also set the agenda for Service Skills Australia's Industry Advisory

1   Tourism Research Australia, Tourism Forecasting Committee, *Forecast 2013 Issue 1*

2   ABS, 2013, Cat. No. 8501.0, Retail Trade, Australia, December 2012.

3   ABS, 2011, Cat. No. 6530.0, Household Expenditure Survey, Australia: Summary of Results, 2009-10.

4   DEEWR (2013), *Employment Outlook to 2017*, p. 3-4, available at http://lmip.gov.au/default.aspx?LMIP/EmploymentProjections

5   Tourism Australia's Tourism 2020 Progress Report 2011/12

6   NCVER VOCSTATS 2013, course enrolments 2008-2012

Committee, thus shaping the activities of the Skills Council and enabling it to develop a Training Package that reflects the industry's skills outcome needs.

Given the changing market demands that have emerged since the publication of the strategy, and in order to prepare for tourism activity over the next decade, a review of the framework is appropriate and timely. This second iteration of the Tourism, Travel and Hospitality Workforce Development Strategy outlines a series of priority areas for action that will strengthen the industry and better position it to take advantage of the continued and growing demand for its products and services.

The aim of the strategy remains the same, that:

People working across tourism, travel and hospitality will be appropriately skilled and able, through the application of their expertise, to contribute to the growth and development of a sustainable, productive and profitable tourism, travel and hospitality industry.

This overarching aim informs five strategic goals (see right).

The goals of the strategy have been distilled into four pillars (Labour Supply, Building Capability, Quality Issues, and Need for Data), each containing a set of priority areas for action.

Successful implementation of the strategy will require industry, training providers and government to work together. Only through such a collaborative approach can we ensure that businesses in the tourism, travel and hospitality industry have access to the right people with the right skills at the right time.

In order to guarantee that the strategy continues to capture the ongoing and evolving needs of the industry, it is proposed that the strategy is subject to another full review in 2019, with a progress report undertaken at the mid-point of June 2016.

Goal 1

The number of people employed in the tourism, travel and hospitality industry is sufficient to do the work required, to the standard required, to consistently deliver a world-class visitor experience.

Goal 2

The people who work in the tourism, travel and hospitality industry have the appropriate skills and personal attributes to deliver a quality experience and there are education and training systems in place to recognise and deliver the skills and knowledge required.

Goal 3

People with experience and expertise are retained within the tourism, travel and hospitality industry because they have opportunities to grow and build satisfying careers.

Goal 4

Businesses in the tourism, travel and hospitality industry have the right information, management systems and processes in place to maximise the contribution of their people.

Goal 5

The tourism, travel and hospitality industry has the structures and mechanisms in place to address its future workforce and skill needs on an ongoing basis.

Introduction

The tourism, travel and hospitality industry must plan for the future if it is to ensure skill and labour shortages will not adversely affect projected growth. Demographic and economic challenges mean Australian businesses will be confronted with continuing labour and skill shortages over the next two decades. If overall business performance is to improve, the issues surrounding these shortages must be managed.

This strategy outlines a series of workforce development goals and action areas, as well as a series of recommendations, that will strengthen the industry and better position it to take advantage of the continued and growing demand for tourism, travel and hospitality products and services.

The challenge is greater than finding sufficient people to meet a growing market. An increasingly demanding customer will expect higher levels of service and increasing the productivity of the workforce will require an innovative and flexible approach to existing and potential staff. Employers will need to look beyond traditional workforce issues and consider how they can develop attractive, productive workplaces. The aim should be to make sure that quality staff will choose to work in the industry over others. Employees should have their choice to work in the industry confirmed by feeling valued, through secure and rewarding jobs that offer coherent career paths and competitive salaries.

Businesses in the tourism, travel and hospitality industry contribute significantly to Australia's Gross Domestic Product (GDP) and national productivity. In addition to economic value, they also contribute value to the wider society, providing a range of employment opportunities and a rich variety of rewarding career pathways for Australians of all demographics.

Tourism's total (indirect and direct) output multiplier was valued at 1.921 in 2010-11. This means that for every dollar tourism earns directly in the Australian economy, it value adds an additional 92 cents to other parts of the economy.[7]

In recent years, the café, restaurant and catering sector has seen continued, strong growth. Turnover in cafés, restaurants and takeaway food establishments totaled $34.314 billion over 2012, representing an increase of 6.7 per cent on the turnover generated in 2011.[8] This growth is also evident in the 2009-10 ABS Household Expenditure Survey, in which the level spent on meals in restaurants, hotels and clubs increased 68 per cent compared with 2003-04.[9]

With strong growth in domestic day travel and assumed resilience in overnight travel, Total Domestic Tourism Expenditure (which captures each of these segments) is forecast to increase by 2.5 per cent to $71 billion in 2012-13 and by a further 1.4 per cent to $72 billion in 2013-14. Total Domestic Tourism Expenditure is now expected to grow at an average annual rate of 1.1 per cent to $77 billion by 2021-22.

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Domestic visitor nights are forecast to grow moderately in the short to medium term, with long-term growth being revised up from 0.8 per cent to 1.0 per cent, meaning that domestic visitor nights are now forecast to reach 307 million by 2021-22. Furthermore, inbound arrivals are forecast to gain more momentum in the coming years. The long-term outlook has been upgraded with an annual growth rate of 3.5 per cent. The forecasts show that 8.4 million arrivals are expected by 2021-22.[10]

The tourism, travel and hospitality industry continues to experience growth[11] and change. With visitor numbers to Australia continuing to expand into new markets, it is crucial that the workforce is suitably skilled in order to provide an appropriate level of service to meet the demands of all aspects of consumer need.

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7   Department of Resources, Energy and Tourism, Tourism Research Australia, 'Tourism's Contribution to the Australian Economy, 1997-98 to 2010-11'. http://www.ret.gov.au/tourism/Documents/tra/TourismContribution.pdf
8   ABS, 2013, Cat. No. 8501.0, Retail Trade, Australia, December 2012.
9   ABS, 2011, Cat. No. 6530.0, Household Expenditure Survey, Australia: Summary of Results, 2009-10.
10 Tourism Research Australia, Tourism Forecasting Committee, *Forecast 2013 Issue 1*
11 Tourism Australia's Tourism 2020 Progress Report 2011/12 states that over the previous year $27bn was spent by international tourism visitors, up 2% (year ending June 2012), $51bn was spent by domestic tourism visitors, up 9% (year ending June 2012), there were 6m international visitors, up 2% (year ending 31 August 2012), and 75m domestic trips by Australians, up 6% (year ending June 2012)
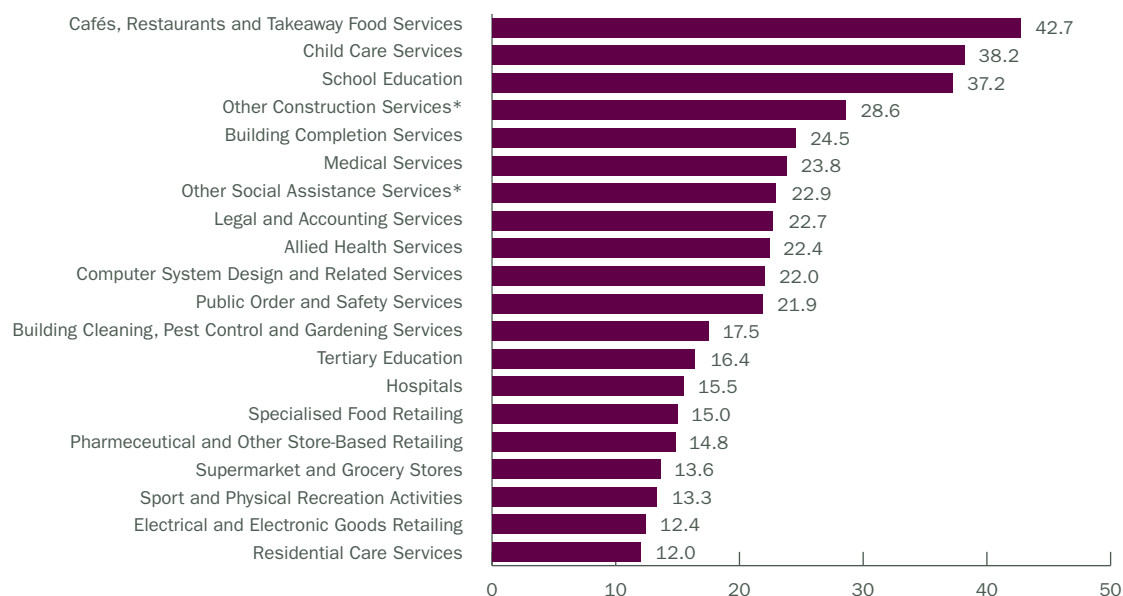
The tourism industry's goal is to double overnight expenditure to up to $140 billion annually by the end of the decade, significantly increasing tourism's contribution to the Australian economy. However, in order to achieve these targets on a sustainable basis, they will need to be underpinned by a robust workforce development strategy. Simply, increased visitation numbers will not be achieved and sustained on a long-term basis unless an adequate supply of appropriately skilled staff is available to provide quality service to customers.

The tourism industry has a labour shortage of 36,000 and an employee vacancy rate of over four times the national average, which prevents parts of the industry from providing an effective service to global customers.

By 2015, an additional 56,000 – 152,000 people will be needed to fill vacancies (including 26,000 skilled positions).[12] This forecast ranges from the most conservative estimate for industry growth to the highest estimate. Given that labour supply has dropped, it is anticipated that vacancy rates will be towards the higher end of the scale.

The Department of Education, Employment and Workplace Relations (DEEWR) forecasts employment growth in the café, restaurant and takeaway food sector to exceed any other in the Australian economy, with growth of 42,700 or an increase of 8.1 per cent expected over the next five years.[13]

Top 20 industry sectors ranked by projected growth to November 2017 ('000s)

Sector	Value
Cafés, Restaurants and Takeaway Food Services	42.7
Child Care Services	38.2
School Education	37.2
Other Construction Services*	28.6
Building Completion Services	24.5
Medical Services	23.8
Other Social Assistance Services*	22.9
Legal and Accounting Services	22.7
Allied Health Services	22.4
Computer System Design and Related Services	22.0
Public Order and Safety Services	21.9
Building Cleaning, Pest Control and Gardening Services	17.5
Tertiary Education	16.4
Hospitals	15.5
Specialised Food Retailing	15.0
Pharmeceutical and Other Store-Based Retailing	14.8
Supermarket and Grocery Stores	13.6
Sport and Physical Recreation Activities	13.3
Electrical and Electronic Goods Retailing	12.4
Residential Care Services	12.0

* 'Other Construction Services' includes brick paving, landscaping and construction machinery hiring with operator (except earthmoving equipment), while 'Other Social Assistance Services' covers a wide variety of social support services, including aged care assistance, disabilities assistance, youth welfare, adoption and welfare counselling.

Source: DEEWR, Employment Outlook to 2017

12 Tourism Australia's Tourism 2020 Progress Report 2011/12
13 DEEWR (2013), *Employment Outlook to 2017*, p. 3-4, available at http://lmip.gov.au/default.aspx?LMIP/EmploymentProjections

This expected growth is likely to intensify the existing shortages found among Chefs, Cooks, Pastrycooks and recruitment difficulties for Bar Attendants and Waiters. DEEWR has found shortages in the above Food Trades to have been in existence for over a decade now. The Department also forecasts that shortages are likely to persist in the future, particularly for specialist Chefs, Cooks and Pastrycooks.[14]

The DEEWR survey of employers in December 2011 found recruitment difficulties for Waiters were particularly found in high-end establishments, due to the requirement for experienced staff with specific skill sets. It also found regional shortages for bar attendants, due to the small field of applicants for advertised positions.[15]

The recruitment challenges faced by the industry will be exacerbated by the drop in qualification enrolment numbers experienced in recent years. This is particularly evident at the Certificate II level for Hospitality, where enrolments have dropped from almost 62,000 people in 2008 to just over 37,200 in 2012.[16] It is reasonable to expect that this fall in enrolment numbers will result in a reduced number of course completions. Low completion rates for Tourism, Travel and Hospitality qualifications have long been a concern for the industry, but it has worked to improve the situation by working collaboratively with the Vocational Education and Training (VET) system through mentoring programs and initiatives to promote the career opportunities available.

In the year 2011-12, Australian tourism continued to undergo transition as it responded to an ever more complex and competitive global travel environment. Asia has emerged as Australia's fastest growing tourism region; it is expected to deliver $19 billion in annualised tourism spending by the end of the decade. By the end of 2012, the region is forecast to deliver 2.5 million visitors to Australia, which is 40 per cent of all international arrivals. In short, this presents significant opportunities for Australia's tourism sector. Inbound tourism from China alone has gone from strength to strength, with an increase in visitor spend (up 9 per cent compared to June 2011), arrivals (up 17 per cent compared to June 2011, with 583,200 visitors) and improvements in market share. China is now Australia's most valuable inbound market with spend worth close to A$4 billion in 2011/12 and potential to grow to A$9 billion by 2020.

In order to take advantage of the opportunities presented by not only this emerging market, but also established markets, the industry must overcome the labour and skill shortages it currently faces. Data released by Deloitte Access Economics (DAE)[17] forecasts that in the period 2012-2015 an additional 25,927 skilled tourism workers will be required. However, the supply of skilled or qualified labour in the same period is forecast to be 10,894, resulting in a shortfall of 15,033 skilled employees. In addition, DAE forecasts the demand for non-skilled labour will total 30,748. The demand for qualified workers by occupation is listed overleaf.

14 DEEWR (2012) *Labour Market Research – Food Trades,* available at http://foi.deewr.gov.au/system/files/doc/other/foodtradesaus.pdf

15 DEEWR, 2012, *Research into the Labour Market for food and drink service workers in Australia*, available at: http://deewr.gov.au/skills-shortages-occupation-and-state-or-territory

16 NCVER VOCSTATS 2013, course enrolments 2008-2012

17 Deloitte Access Economics, 2011, Australian Tourism Labour Force Report: Labour Force Profile (Part 2), prepared for the Department of Resources, Energy and Tourism, Canberra, p.15.

Top 10 Occupations by accumulated shortages in skilled labour (2012–2015)[18]

Occupation	Demand for qualified labour 2012-15	Supply of qualified labour 2012-15	Total qualified labour shortage 2012-15
Chefs	3,492	1,375	2,118
Café and Restaurant Managers	3,114	1,162	1,952
Waiters	2,110	720	1,390
Kitchenhands	1,839	537	1,302
Tourism and Travel Agents	1,531	441	1,090
Cooks	1,658	759	899
Bar Attendants and Baristas	1,360	511	849
Hotel and Motel Managers	1,072	394	679
Automobile Drivers	1,226	548	678
Housekeepers	899	335	564
Top 10 total	18,301	6,782	11,519
Total tourism and hospitality	**25,927**	**10,894**	**15,033**

18   The demand model draws on data from a range of publically available sources. The predominant sources for tourism activity in and to Australia are Tourism Research Australia (TRA), the Tourism Forecasting Committee (TFC) and the ABS' Overseas Arrivals and Departures publication. This modeling only includes the portion of workers estimated to be servicing tourists/visitors. This estimation is based on the proportion of expenditure by tourists/visitors. For example, given that visitors account for 30.9 per cent of restaurant and takeaway food expenditure, only 30.9 per cent of restaurant workers are included in this modeling. Therefore, the total shortage for all these occupations exceeds what is produced in these results and the actual demands may be additional to this.

Aim of the strategy

People working across tourism, travel and hospitality will be appropriately skilled and able, through the application of their expertise, to contribute to the growth and development of a sustainable, productive and profitable tourism, travel and hospitality industry.

Background

The previous version of the workforce development strategy was developed by the industry to address labour and skills shortages. The original strategy became a launch pad for a range of projects and programs designed to address the challenges faced by industry.

Plans to address tourism employment needs were developed, encouraging industry engagement, dialogue and the collection of data with integrity. Regional strategies to address labour skills issues are being implemented at a local level and will enable the application of further projects.

A network of skills advisors has been established, which aligns the industry in terms of enterprise, associations and Government (from Local through to Federal). A common dialogue was achieved that articulated the strategy and turned it into action. Skill development benefits were achieved and produced measurable results. The establishment of a Skills Advisor network enabled the identification of where funded training solutions were required. The data gathered through these programs provides a clearer picture of the industry and will enable further workforce planning.

Each priority area of the strategy was also mapped to Service Skills Australia's Industry Advisory Committee Agenda. This set the direction for the activities of the Skills Council, including the review of the training package, the content of the sector-specific Environmental Scan and individual research studies such as a student destinations study to investigate the graduate outcomes of tourism, travel and hospitality students.

The original goals of the previous strategy remain largely unchanged. Although work has been done to address the challenges facing the industry, still more is needed in the future.

Based on the current state of the industry, these five goals have been distilled into four pillars, each with a number of priority areas for action.

Strategy goals

Goal 1

The number of people employed in the industry is sufficient to do the work required, to the standard required, to consistently deliver a world-class visitor experience.

Goal 2

The people who work in the tourism, travel and hospitality industry have the appropriate skills and personal attributes to deliver a quality experience and there are education and training systems in place to recognise and deliver the skills and knowledge required.

Goal 3

People with experience and expertise are retained within the tourism, travel and hospitality industry because they have opportunities to grow and build satisfying careers.

Goal 4

Businesses in the tourism, travel and hospitality industry have the right information, management systems and processes in place to maximise the contribution of their people.

Goal 5

The tourism, travel and hospitality industry has the structures and mechanisms in place to address its future workforce and skill needs on an ongoing basis.

Four pillars

Pillar 1: **Labour supply** – supports Strategy Goals 1 and 3

Action areas:
- Improved attraction, recruitment and retention
- Labour sources
- Access to quality workplaces
- Provision of career pathways

Pillar 2: **Building capability** – supports Strategy Goals 2 and 4

Action areas:
- Management, leadership and governance skills for businesses
- Language, Literacy and Numeracy skills
- Better recognition of learning and skills, accelerated pathways
- Central resource for available programs to enable upskilling of staff

Pillar 3: **Quality issues** – supports Strategy Goal 2

Action areas:
- Creating a more responsive training and learning system
- Quality in delivery and assessment
- Recognition of quality training providers

Pillar 4: **Need for data** – supports Strategy Goals 4 and 5

Action areas:
- Analysis of data at a regional and sectoral level
- Destination management planning and labour force mapping to assist workforce planning
- Central resource for workforce data

Pillar 1: Labour supply

Businesses in the tourism, travel and hospitality industry have access to appropriately-skilled people in the requisite numbers to capitalise upon continued industry growth.

This pillar supports Strategy Goals 1 and 3, as it relates to the provision of labour and access to quality workplaces.

Improved attraction, recruitment and retention

Improved recruitment strategies, job matching and career development opportunities need to be employed to encourage people to seek work and remain in the industry. Some casual employees may have the skills and interest to progress in the industry; work needs to be done, through programs such as the Discover Your Career (incorporating Discover Hospitality and Discover Tourism), FutureNow's Hospitality Ambassador Program in WA and by other means, to better articulate the career opportunities to existing staff. Other employees may be working casually by choice and enjoy the flexibility this affords them.

The use of customised recruitment tools and screening processes can assess whether potential and existing members of staff have the aptitude to work in the sector. These processes and tools aim to assess appropriateness for the industry, establish attitude to work, recognise relevant prior learning and experience and establish skill gaps.

An employee leaving a business can present a number of challenges, but there is broad acceptance of the positive impact it can have upon the wider industry if that individual stays within tourism, travel and hospitality. This intra-industry movement allows employees to experience the breadth of job roles and operations available, enabling them to enhance their skills and knowledge and strengthen the industry. The sharing of employees within a community or region can create a pool of talent from which employers can choose and allows for individuals to gain a broader understanding of the careers available.

The industry's high turnover rate is due in part to the seasonal nature of the sector, which requires a large influx of workers in peak seasons and a smaller number in off-peak seasons. These characteristics, in conjunction with varying busy periods during many businesses' working weeks, necessitate that a large proportion of casual and part time workers are employed.[19] Whilst this suits those employees who want to achieve a work life balance, the industry still requires a base employment pool. The industry needs to work towards a balance of employment options that achieve both quality and flexible options.

In addition to targeted recruitment strategies and employment models to expand the potential workforce, the industry will need to facilitate strategies to retain people who are already working in the sector and encourage them to commit to careers in the industry. This may include strategies such as seasonal job sharing, incentives, better articulation of career pathways, the implementation of mentoring programs, improved employment conditions and the formal recognition of skills gained on the job. Consideration may also be given to the adoption of multi-skilling models that allow for people working in the industry to apply their skills across multiple sectors.

These initiatives may be developed at the individual workplace level or through an industry-wide approach. Strategies must be flexible enough to be tailored to individual circumstances.

Recommendations:

- The range of career pathways available in the industry continues to be articulated through tools such as Discover Your Career, plus through the development of other innovative resources.
- Pre-screening of potential employees to establish aptitude and appropriateness for a job role, as well as undertaking Recognition of Prior Learning (RPL) and identifying skill gaps.
- Businesses collaboratively, including through their representative bodies, develop programs to share workforce resources and create a wider talent pool from which they can choose.

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19 ABS, 2006, Cat. No. 8687.0, Clubs, Pubs, Taverns and Bars 2004/05. Industry employment structure: Permanent full-time: 23.0%; Permanent part-time: 5.6%; Casual workers: 70.1%; Unidentified: 1.3%

Labour sources

Increasing labour force supply and participation will be key elements in addressing current and projected labour shortages. Australia still has significant scope to increase workforce participation and businesses can improve industry participation rates by developing strategies to target specific groups including:

· Mature age workers

· Return to work target groups

· Aboriginal and Torres Strait Islander Peoples

· Young people

· Overseas workers

· Current workforce

Mature age workers

Initiatives introduced to attract mature age workers and accommodate their needs will become even more valuable as this workforce pool grows.[20] The industry is well suited for semi-retired people who are seeking short-term jobs on a seasonal basis or jobs that offer reduced hours of work.

Labour shortages and increased longevity have meant that the participation of mature age people has increased substantially in recent years, but there is still room to increase numbers.[21] The availability of seasonal, casual and part-time work in the tourism, travel and hospitality industry also fulfils a need for older workers to continue to augment their retirement income and is a positive selling point for those people who do not wish to work full-time.

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20 Service Skills Australia Environmental Scan 2013 p11: "The median age of Australia's population (37.4 years at June 2012) is projected to reach between 38.7 – 40.7 years in 2026 and 41.9-45.2 years in 2056. This shift is already evident. Since June 1992, the median age has already increased by 4.7 years".

21 For people nearing retirement — Australia is ranked 13th for men and women aged 55 to 64 years, behind New Zealand, the US, the UK and Canada (figure 3). http://www.pc.gov.au/__data/assets/pdf_file/0008/60479/workforceparticipation.pdf

Stakeholder feedback has indicated that more can be done to re-engage mature age workers; a cohort of the workforce that commonly displays the attitudinal and interpersonal skills frequently seen to be lacking across the rest of the industry.

In addition to addressing labour shortages, the employment of older workers is likely to:

· Increase workforce diversity

· Increase workforce expertise, experience and stability

· Reduce the budgetary pressures from ageing – generally, workers pay more tax and have a lower call on welfare

· Cater for an increasingly ageing customer base

Mature age workers potentially bring personal and professional skills and knowledge which would benefit employers in the industry, whist the flexibility of work hours available in the industry may be an appropriate fit to the employees' lifestyle needs. Further research is required to establish the motivators, attractors and inhibitors of this potential workforce.

The industry, however, will not be able to make further serious inroads into lifting the participation of older Australians without a workplace relations system that allows people to transition from full-time employment into retirement though a mix of flexible working arrangements.

Return to work target groups

There is significant scope to increase the participation of welfare recipients, including people with disabilities[22] and people returning to the workforce e.g. parents. Ongoing labour and skills shortages will require the industry to invest more in recruitment strategies that seek to engage suitable people from these groups. Increasing the workforce participation in the industry by under-represented groups could ease labour pressures and bring broader benefits to the industry, society and economy. Improving the workforce participation of these groups will require greater pre-employment screening in order to determine suitability. Employers that aim to target these groups as a labour source will need to make

reasonable adjustments to employment arrangements and workplace practices in order to cater for their needs. Furthermore, it is critical that managers and supervisors are supported to gain the skills to enable them to adequately manage these groups.

Aboriginal and Torres Strait Islander Peoples

Tourism research indicates that engagement with Aboriginal People and their culture is one of the major experiences that overseas visitors are seeking when they travel to Australia. A significant number of young Aboriginal and Torres Strait Islander People will be entering the workforce in the next two decades; many of these are located in regional areas where tourism, travel and hospitality businesses are major employers.

Employment in the tourism, travel and hospitality industry has the potential to act as a pathway for economic independence for Aboriginal and Torres Strait Islander People through the development and ownership of tourism enterprises. Close local community connections and a collaborative approach to the development of such enterprises can help to increase participation and improve the skills base of individuals interested in developing a career in the industry.

Young people

Managing Generation Y (those born between 1978 – 1994) and Generation Z (1995 – present) employees is a workforce challenge that employers will need to meet. It is this age group that provides a significant part of the traditional tourism, travel and hospitality workforce and these generations have significantly different expectations of the workplace than previous generations.

Industry needs, though its involvement with Discover Your Career and the formation of the Tourism and Hospitality Careers Council, to continue its efforts to consider the motivations of this cohort, improve the image and brand of the industry and present it as a career of choice to this group.

22   The business case for employing people with disabilities is outlined by the Australian Chamber of Commerce and Industry's project 'Employ Outside the Box'.

Overseas workers

The reality of the tourism, travel and hospitality industry is that the vast number of job roles that are currently—and will continue to be—required cannot be filled through local sources alone. The use of overseas labour remains a vital source of employment for the industry and must be balanced and based on established need.

Projected growth in the number of jobs suggests that future workforce needs will require ongoing access to overseas workers. Therefore, consideration must be given to how the industry will enter the global market for skilled and unskilled labour without undermining the employment conditions of Australian workers.

The industry currently accesses overseas staff through a number of measures, such as Working Holiday Maker (WHM) visas, employer sponsored 457 Visas, overseas students and permanent residence arrangements for skilled migrants. In addition to the call for the restoration of cooks and chefs to the Skilled Occupation List, industry bodies have suggested a number of amendments to visa arrangements that may make this pool of workers more accessible for businesses, particularly SMEs or those

based in specific regions. These suggestions include a review of 457 visa conditions and arrangements; the inclusion of "employment for 88 days in tourism and hospitality in regional Australia" as part of the 12 month extension program for WHM second visas; increasing the age range for WHM visas from 18-30 up to 35[23]; and the expansion of the WHM scheme to include China, India, Vietnam and the Philippines, as well as other key international growth markets, with caps on countries like Indonesia and Malaysia being lifted.[24] Industry bodies have also advocated for an expansion of the Seasonal Worker Program to assist with staffing businesses during peak periods.[25] Businesses in the industry, particularly those based in regional and remote areas have long expressed difficulties in the recruitment of staff; extending the Seasonal Worker Program to encompass more regions and other neighbouring nations may assist these operators to address these challenges.

With international students also being identified as an important source of labour, it has also been recommended that international student graduates from approved higher education and VET institutions are enabled to accept temporary work visas, similar to

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23   As noted in the Australian Tourism Export Council's "The Importance of the Working Holiday Visa (Subclass 417) Position Paper, February 2012.

24   As noted in the Tourism & Transport Forum's "Australian Tourism: Backing Our Strengths", July 2013.

25   ibid

457s, for occupations in demand; that the number of hours international students are permitted to work be increased from 20 to 30 hours per week; and that State Governments be encouraged to improve their state's appeal by extending similar benefits to international students as to those that are available to domestic students, such as public transport concessions.[26]

With the increased reliance on overseas workers, it is important that employers be advised on best practice for the pastoral care of this cohort. This may include providing information on issues such as health care, transport, housing and financial arrangements.

Current workforce

There is a greater need for industry to recognise and develop the current workforce that is already available to them. These people are already working and therefore are willing and capable to work. This makes these workers a valuable and attractive source for employers. Better utilisation of the current workforce can be achieved through making job roles more attractive to workers, especially in comparison to other industries where they may have previously worked. There exists a range of rewarding career pathways available in the industry and these can act as powerful tool for retention if articulated to people already working in the industry.

Businesses and enterprises operating in States and Territories where the minerals and resources industries maintain a strong presence commonly identify the issue of losing staff to those sectors. Work must be done to ensure that opportunities remain available to those who wish to return to the tourism, travel and hospitality industry.

Recommendations:

- Further research be undertaken to better understand the motivators, attractors and inhibitors of mature age people for work in the industry.
- Greater pre-employment screening to be undertaken for people returning to the workforce in order to determine their suitability for roles within the industry.
- Industry continues to actively participate with Discover Your Career and the Tourism and Hospitality Careers Council to improve the image of the industry and present itself as a career of choice to young people. In addition, the range of career pathways available in the industry be more clearly articulated to people already working in tourism, travel and hospitality operations.
- The restoration of cooks and chefs as priority occupations for migration purposes.
- Industry and government to work together to enable businesses to enter the global market for skilled and unskilled labour without undermining the employment conditions of the Australian workforce.
- Entry points are clearly identified and made available for people wishing work in the industry, either as new entrants or those returning to the industry.

26 As noted in the National Tourism Alliance's 'Briefing Paper 3 – Attract, develop and retain the right number of people with the right skills in tourism and hospitality'.

Access to quality workplaces

Whilst acknowledging that work in tourism, travel and hospitality fulfils a wide variety of needs for both full time and part time workers, greater effort is required to assess the impact of existing employment arrangements and job design on the attraction and retention of quality staff.

Businesses will need to maximise the productivity of each employee and achieve the highest level of workplace efficiency if they are to maintain any level of profitability. This is especially the case in an industry that has both a large and mobile workforce and narrow profit margins. Greater collaboration between management and staff will be required to establish and maintain a workplace culture that fosters innovation and rewards effort. Businesses need to consider ways in which they can make job roles and conditions more attractive. Consideration needs to be given to redesigning jobs to enhance business flexibility and responsiveness and maximise the opportunities to utilise the skills of individual workers. It could also lead to increased employment certainty for these employees. Flexibility will especially benefit smaller businesses, those in rural and regional areas and those affected by seasonality.

Flexible employment arrangements will also need to take into account the particular needs of an increasingly diversified labour force. Some employees—for example, students, parents or mature age people—may seek flexibility and work-life balance, which in many cases could result in a preference for part time work. Tourism, travel and hospitality employers can facilitate this in order to make the industry more attractive.

The industry, by necessity, engages a large number of casual and part time employees and also needs a growing number of full time career aspirants to service healthy growth. The industry involves, for many, working hours that are outside the 9-5, Monday-Friday, traditional working week. This is unattractive to some but attractive for others.

In addition, the industry is made up of predominantly small businesses that operate on low margins. This makes it difficult for the industry to compete with industries that are in a boom cycle of higher returns that can afford to pay higher wages to attract employees.

Mentoring programs can also assist in improving the quality of the workplace and can result in increased staff retention. This does not only apply to new entrants, but also across a number of levels as people progress along their career path; for example, for supervisors transitioning to management roles.

Recommendations:

· Assessment be undertaken of the impact of existing employment arrangements and job design on the attraction and retention of quality staff.
· Mentoring programs be developed and implemented to enhance workplace support.

Provision of career pathways

The many non-linear career pathways available in tourism, travel and hospitality have yet to be adequately articulated. The many transferable skills that can be learned through work in the industry offer multiple entry and exit points and these opportunities need to be better presented to existing and potential employees.

By identifying and communicating the entry points into the industry, employers will be better equipped to manage the expectations of new entrants.

Stakeholder feedback has indicated that there persists a belief at high school level that the sector does not offer a legitimate, lengthy career. This negative view is seen as a significant barrier for businesses seeking to attract people with the right attitude to work in the industry. Action needs to be taken to redress this perception through effective communication with students, parents and career advisers.

The industry has already developed and implemented a vocational education and careers campaign that promotes the opportunities that the industry presents to a range of potential employees. The Discover Your Career resource (incorporating the Discover Hospitality and Discover Tourism brands) is designed to attract younger jobseekers, those looking to change careers, older workers, those in the welfare system and Indigenous Australians.

In addition to web-based projects such as Discover Your Career, effective results may be achieved by industry participating with local schools and communities to deliver career information, insights and pathways. Collaborative actions that industry may wish to consider include:

- Partnering with schools and communities in the implementation of work exposure programs for Year 7-12 students.
- Supporting coordinated information services for career seekers and parents that utilise the experience of current and former apprentices and trainees as a source of career information and insight.
- Develop localised and responsive apprentice ambassador programs that equip and support apprentices as peer advocates and role models.

A key point of focus for the industry is the Vocational Education and Training in Schools (VETiS) program. VETiS is seen as a critical area for action as it is perceived as being a significant source of future talent.

Stakeholder feedback has highlighted problems around the delivery of VETiS, suggesting that typical delivery does not achieve required industry outcomes. In school environments, VET training requirements are in competition with a fundamentally different pedagogical approach than that required by VET. Inconsistency in VETiS practice and delivery across different jurisdictions makes delivery difficult for those training providers and businesses that employ across state borders. There are a variety of interpretations of the term VETiS, as each state or territory system locates VET in a different curricular context. Currently, there are no common standards concerning approval, regulation, resourcing, administration, delivery and monitoring of VETiS.[27]

In order for the students and employers to maximise the potential of VETiS, clear and explicit guidelines need to be produced, predicated on an understanding that not all industry segments are appropriate for a school setting. The robustness of vocational training pathways in schools can be strengthened by including structured work placements, potentially driven by industry relevant bodies. If managed successfully, the VETiS program will enable a key target group of young people decide to get a taste of work in the industry and help them to decide whether a career in tourism, travel and hospitality is desirable. This will also help to reduce the trend identified by many stakeholders of students undertaking tourism, travel and hospitality qualifications as a second or third choice.

Recommendations:

- The development of clear guidelines for the VETiS program, predicated on an understanding that not all industry segments are appropriate for a school setting.
- More effective communication with students, parents and career advisers to promote the career possibilities offered by the industry.

27   Service Skills Australia Environmental Scan 2013

Pillar 2: Building capability

Increase industry productivity through improving skills, including leadership, management and governance skills.

This pillar supports Strategy Goals 2 and 4, as it relates to equipping people with appropriate skills and ensuring that the industry has the right information and management systems in place to enable this activity.

Management, leadership and governance skills for businesses

Effort is required to further develop and maintain the capability of managers in the industry; this will empower them to undertake effective HR planning, run operations efficiently and to attract, develop and retain staff. These skills will be highly variable in an industry dominated by owner/operator SMEs.

Furthermore, the lack of governance training available at a director level is a serious concern for the clubs sector in particular. It is reported that, in some instances, managers are taking advice from board members who have had no management or governance training. Many roles within the clubs sector and other segments (e.g. visitor information centres) are staffed by volunteers who are unable to access funded training. In order to ensure the sustainability of these multi-million dollar operations, it is imperative that people in leadership roles are properly skilled.

Given that the industry is dominated by non-employing and self-employed small businesses, there needs to be a targeted effort to make sure that operators have the skills and knowledge to run productive businesses and that industry has access to the appropriate training provision to allow any skills gaps to be filled. This could be achieved through the development of new skill sets, targeted towards management and leadership skills, covering subjects such as financial literacy and mentoring and supervision.

It should be noted that industry has significant, persisting concerns about the consistency and quality of training and assessment of its potential and existing trainees.

Recommendations:

- Funding to be made available for volunteers to undertake training through targeted skills sets, particularly with reference to management, leadership and governance skills.
- Ongoing development and implementation of skill sets targeted towards management, leadership and governance skills.

Language, literacy and numeracy skills

Stakeholders have identified Language, Literacy and Numeracy (LLN) and Core Skills (problem solving, using initiative, decision making) as frequently lacking in employees. This is reflected at a national level across multiple industry segments. More than 4 in 10 working age Australians have literacy and numeracy skills below the level considered to be the minimum required by individuals to cope with the demands of life and work in a knowledge-based society.

Apart from vocational education, the development of Core Skills and LLN skills help individuals to effectively and safely operate at work and in their personal lives. Additionally, LLN is important for the productivity and efficiency of businesses. Therefore, employers and managers may need to address the LLN skills that underpin VET as well as focusing their training on vocational skills.

The responsibility for building the LLN skills of Australians is shared by industry and all education sectors. Industry can access assistance to train employees who have LLN needs via the Australian Government's Workplace English, Language and Literacy (WELL) program.

Industry needs to consider how to address these issues in order to raise the productivity of businesses and assist its employees to maximise their potential.

Recommendation:

- Those businesses within the industry participate in the WELL program in order to identify and assist those employees with LLN challenges.

Better recognition of learning and skills, accelerated pathways

Tourism, travel and hospitality occupations are often not recognised as skilled. Greater effort is required to use Recognition of Prior Learning (RPL) to provide formal recognition and qualifications for people who have been working in the industry for many years, without forcing them to undertake a full VET course. The need for consistency in the application of RPL has been identified as an issue that must be addressed. RPL processes that have the confidence of industry must be identified and funded.

There is also a need for alternative models of apprenticeship training to promote accelerated learning and make trade based pathways more attractive to mature age workers and not disadvantage people who wish to stay in regional locations.

The use of pre-apprenticeship or pre-employment programs (for example, in Commercial Cookery), which allow apprentices or new entrants to complete a block of training prior to commencing in a workplace, has long been seen as an effective method to ensure that new entrants are a good fit for the industry and should be the preferred pathway to training. In addition, these types of programs also allow for rural and regional job seekers to participate more fully in the workforce.

A good example of this type of program is the Tasmanian Hospitality Association (THA)'s pilot for school-based apprentices, which incorporates pre-vocational training to those selected to participate. An intensive Certificate II in Kitchen Operations is delivered prior to the apprentices being sent into the workplace, thus ensuring they are equipped with the skills consistent with industry requirements.

Recommendations:

· Better, more effective use of RPL processes that assist both the employee and business must be developed.
· There must be further exploration of alternative and accelerated apprenticeship models.
· Industry must support and encourage new entrants to engage in pre-apprenticeship programs to assist in addressing low completion rates.

Central resource for available programs to enable upskilling of staff

The tourism, travel and hospitality industry is predominantly made up of small and micro businesses, many of whom undertake little workforce planning and lack any kind of succession plan or exit strategy.

A challenge for business owners is knowing where to go to obtain assistance to support such planning. The ever-changing multitude of available programs and resources can be difficult to navigate and can result in opportunities being missed. Clearer guidance is required for businesses on how to recruit and develop staff and take advantage of programs and funding opportunities.

Recommendation:

· Workforce planning advice and information is easily accessible, allowing businesses to be matched with the appropriate program.

Pillar 3: Quality issues

Measures to increase the quality of skills through improving the quality of delivery and assessment

This pillar supports Strategy Goal 2, as the focus is on ensuring that education and training systems recognise and deliver the skills and knowledge required by industry.

Creating a more responsive training and learning system

A target of the previous workforce development strategy was to provide for better coordination, improved communication and industry leadership to create a truly customer-driven training system; this remains valid and relevant.

Developing and enhancing the skills of the workforce is a critical component of this strategy. A better match between the skills of employees and the skills required in the workplace make for a more productive industry. It is essential that the education and training system meets the needs of employers and their staff.

The revised *SIT Tourism, Travel and Hospitality Training Package* aligns competencies more closely with industry practices and provides the foundations for an effective qualification framework for the industry. It is imperative that the training package continues to reflect the current needs of industry, which can be achieved through the continuous improvement process, whilst remaining cognisant of the fact that the industry largely comprises small, time-poor, businesses. Better outcomes can be achieved when the VET system and industry collaborate on the future direction of endorsed components of the training package.

If training system supply is to meet industry demand it is contingent on the correct funding model being in place. Industry demand should inform funding models for training at all levels.

Funding models currently vary across states and territories. Differences exist along the continuum from fully subsidised training, co-contribution models, caps on hourly rates or the number of funded training places,

to situations where there is no funding allocation for particular industry sectors.

The contestability model being rolled out in some states provides responsiveness, but capacity will be mitigated by any individual states or territories deciding to limit funding, for example by exempting certain qualifications from funding, or implementing cap systems, etc.

Differences in the models also exist in terms of the application. For example, students studying higher level VET qualifications such as Diploma level and above are dependent upon VET FEE-HELP, whilst those studying at Certificate III for instance, may be reliant on funding through partnerships between providers and employers to access funding programs.

Additionally, consideration should be given to the application and funding of skill sets to meet the needs of individuals and enterprises, particularly in cases where full qualifications are not required to perform job roles. These skill sets can provide the basis for people to achieve full qualifications at a later date.

The tourism, travel and hospitality industry also needs to be well positioned to capitalise upon the opportunities presented by increases in visitation from Asia, in particular China. While language skills are important in providing an appropriate level of service to international visitors, preparing the workforce will require more than basic language skills alone; staff will be required to display cultural awareness and have the ability to interact effectively with customers. Only through this holistic approach to service will success be achieved on a sustainable, long-term basis.

Another emergent area where a skills gap has been identified is the effective use of social media. Many businesses are still coming to terms with how to manage this area of their operation and industry stakeholders have expressed concern about the negative impact a poor social media strategy can have upon a business. Therefore, there is scope for a skill set to be developed to enable operators to making the most of the opportunities offered by this new marketing avenue.

Quality in delivery and assessment

Industry needs to be confident that assessment processes are rigorous enough to maintain and increase the integrity of VET qualifications.

This strategy is underpinned by the assumption that effective education and training is an essential component of a sustainable industry. Poorly designed or delivered training fails to provide the skills and knowledge required by individuals and their employers and does not maximise the significant investment of public and private funds. Quality delivery and assessment leads to job-ready graduates and provides individuals with the appropriate balance of practical and theoretical skills. Training outcomes need to be validated and training industry regulators need to ensure that training providers are equipping graduates with the skills to be competent in the workplace.

It is evident that barriers remain for both workers and employers with regard to the accessibility of training. This can relate to the viability of programs as well as the availability of training within the appropriate work-life balance. Training should be certified, have a flexible

delivery format and be conducive to employees' work and life commitments.

In terms of delivery, feedback from industry stakeholders has noted that clusters of skill sets are sometimes more effective than full qualifications. Furthermore, while recognising that the use of technology has a part to play in training (particularly in regional and remote areas), the wholesale use of online training and assessment is inappropriate for job roles that require practical skills.

The Industry Skills Council, Service Skills Australia, has, through consultation with the industry, already made improvements to the Tourism, Travel and Hospitality Training Package. This has resulted in more specific units of competency, tighter assessment guidelines and more detailed requirements for assessors. A range of products and services have been developed that underpin the work that the Skills Council undertakes in implementing its training package on a sustainable basis. Included in this suite of products are Training Package User Guides, which stipulate:

·   Industry's expectations regarding assessment and learning requirements to achieve quality outcomes;
·   Required assessor/trainer qualifications and experience above and beyond those required by regulation;
·   Professional development requirements for trainers and assessors;
·   Recommendations around work placement and/or experience;
·   Guidelines for selecting and recruiting students; and
·   Minimum equipment and facility requirements for assessment.

A project being undertaken by the Industry Skills Councils, in conjunction with the National Skills Standards Council (NSSC), directly responds to industry's need for greater confidence in the vocational education and training system. Concerns were held that while ISCs are the bodies responsible for the development of training packages, they have minimal ability to ensure that the qualifications and the units of competency within are being delivered and assessed in a consistent and high quality manner.

The project looks at proposed quality measures which could be applied to qualifications or units of competency to provide clear standards to ensure quality delivery and assessment. Two distinct frameworks have been developed around delivery and subsequent assessment and will outline options for formal implementation within training packages. Information throughout this project has also fed into the NSSC review of the Standards for Training Packages.

Recommendation:

·   That the provisions of the Training Package, developed in partnership with industry, are implemented by all training providers in order to ensure training and assessment is being conducted in a way that produces work-ready graduates.

Recognition of quality training providers

Despite a network of high quality training providers that provide internationally-recognised programs, there is a lack of industry confidence in the current VET system. Audits undertaken by the Australian Skills Quality Authority (ASQA) ensure that nationally approved quality standards are met and help to strengthen governance within RTOs. Many of the key elements of an effective system are in place and recognition needs to be given to RTOs who deliver quality training and who can present a benchmark for the rest of the VET sector.

Recommendation:

·   Increased promotion and widespread adoption of the Right Way program – an industry recognition system for quality training providers that focuses on the three key areas of quality training and assessment facilities, quality trainers and assessors, and quality learning resources.

Pillar 4: Need for data

Develop a strong evidence base to continue the planning cycle to enable workforce development

This pillar supports Strategy Goals 4 and 5, as it focuses on providing the industry with information to maximise the contribution of the workforce and putting in place structures and mechanisms to address its future skills needs.

Analysis of data at a regional and sectoral level

A rich source of data on the skills requirements of the tourism, travel and hospitality industry has emerged through the development of programs to address those needs.

Intelligence has been gathered through direct consultation with businesses in the industry via a network of Skills Advisors. Analysis of this data will enable industry to gather a clearer picture of emerging trends and skill needs across each industry sector, at national, state and regional levels and will allow for workplace productivity in the tourism, travel and hospitality industries to be measured and industry benchmarks to be formed.

Furthermore, publicly available data shows where funded training interventions have been requested and applied. Data is also emerging through consultations at a regional level throughout Australia. Analysis of this data will enable businesses to be linked to programs to improve education, training and employment outcomes.

> ### Recommendation:
> · Analysis of data be undertaken to identify emergent labour, skill and training trends at all levels in order to increase understanding of the industry and permit further workforce planning.

Destination management planning and labour force mapping to assist workforce planning

Improved information is essential to support growth projections and investment decisions.

Destination management planning will be seriously compromised unless it is linked to workforce planning. Increasing the number of visitors to an area will have neither long-term impact nor sustainability unless a sufficient volume of skilled staff are available to provide a quality service. Given the seasonal nature of tourism, the alignment of visitation numbers and employment is crucial. There are examples of community-wide approaches to skills development that have been successful via the National Workforce Development Fund and work is currently taking place to recognise tourism hotspots. Positive initiatives such as these should be highlighted and promoted more broadly.

Furthermore, information available through consultation work completed in the early stages of regional workforce development planning suggests that many businesses based in and around tourism destinations do not consider themselves to be part of tourism (for example, retail outlets operating within or in close proximity to tourism destinations). This again relates to the poor perception outlined earlier in this document and exacerbates the challenges the industry faces in adequately accessing labour.

> ### Recommendation:
> · The promotion of successful, community-wide approaches to skill development via the effective use of programs at a regional level.
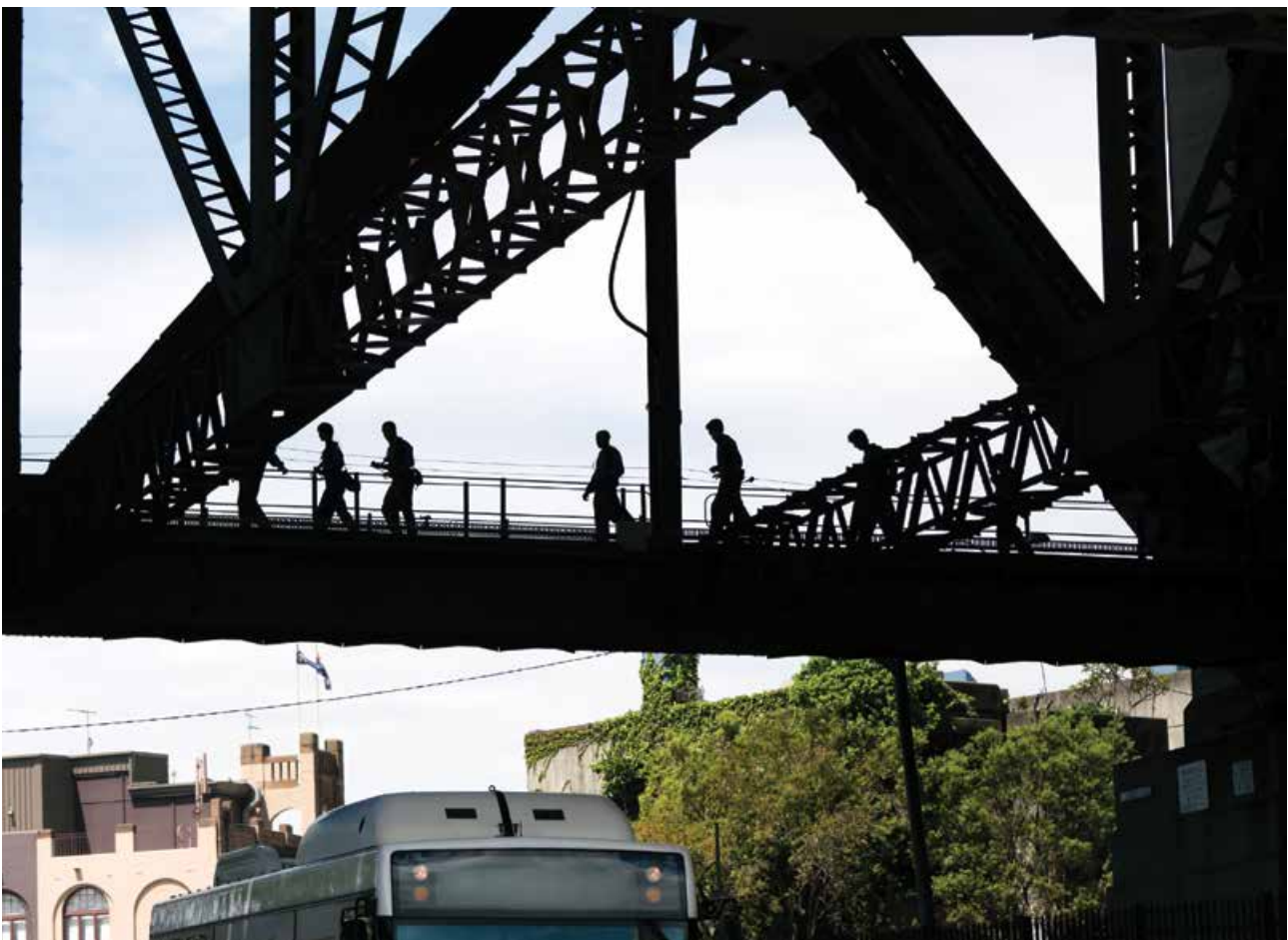
Central resource for workforce data

Significant and wide-ranging data about the current and predicted tourism, travel and hospitality workforce is available via a range of government agencies and bodies such as Tourism Research Australia. Workforce data is often also available through industry organisations that have collected, and made publicly available, data on their workforce. However the data is not available in one place and is not always easily accessible for businesses. The many small businesses that dominate the industry find it difficult to interpret in everyday operational settings. It will not be possible to accurately predict and respond to the challenges confronting the industry without the availability of timely information on current and future labour market trends. This information needs to be linked to broader industry and economic development processes at the regional, state and national level.

Recommendation:

· Publicly available workforce data to be collated in one central place and presented in a clear, user-friendly way that provides a helpful resource to enable the industry to plan for its future labour and skill needs.

Future directions

Successful implementation of the strategy will require industry, training providers and government to work together. Only through such a collaborative approach can we ensure that businesses in the tourism, travel and hospitality industry have access to the right people with the right skills at the right time.

In order to ensure that the strategy continues to capture the ongoing and evolving needs of the industry, it is proposed that the strategy is subject to another review in 2019, with a progress report at the mid-point of June 2016.