

2018

# Tourism, Travel and Hospitality

INDUSTRY REFERENCE COMMITTEE  
INDUSTRY SKILLS FORECAST



**SKILLSIQ**

CAPABLE PEOPLE MAKE CLEVER BUSINESS

# Contents

Executive Summary	3
Sector Overview	6
Challenges and Opportunities	25
Employment and Skills Outlook	32
Key Generic Skills – Ranked in Order of Importance	40
Key Drivers for Change and Proposed Responses	41
Proposed Schedule of Work	46
References	50

## Skills Forecast

### Name of IRC:

Tourism, Travel  
and Hospitality

### Name of SSO:

SkillsIQ Limited

### About SkillsIQ:

SkillsIQ supports 18 Industry Reference Committees (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 50% of the Australian workforce.

# Executive Summary

The training package products overseen by the Tourism, Travel and Hospitality Industry Reference Committee (IRC) cover a number of ‘people-facing’ industry sectors in Australia, involving:

- Tourism
- Travel
- Events and exhibitions
- Accommodation – hotels, holiday parks and resorts
- Hospitality.

All sectors cater to both domestic and international markets, and are significant in driving economic growth in Australia. They represent a range of business types and services, which in many cases are interconnected. For example, tourism incorporates a complex combination of overlapping sectors including those listed above (e.g. events and exhibitions, hotels, holiday parks and resorts, etc.) and also impacts the transportation and retail sectors. Events and exhibitions draw on various services, including marketing, audio-visual systems, catering, transport and accommodation. Economic activity is therefore extensive across all these interrelated sectors and additionally impacts many secondary industries.

The sectors host a multitude of job functions, and the occupations within them are diverse. There are a vast number of occupations supported by this training package, and some examples include:

- Tourism consultant
- Travel consultant
- Tour guide/operator
- Tour manager
- Outdoor recreation guide
- Booking agent
- Visitor information officer
- Marketing manager
- Sales executive
- Event or exhibition assistant
- Conference or engagement coordinator
- Venue coordinator
- Venue organiser
- Resort/holiday park manager
- Waiter
- Kitchenhand
- Bar attendant and barista
- Chef and cook
- Café and restaurant manager.

Employment projections are strong across all areas of industry. Each sector, however, faces its own challenges and consumer-driven forces that impact on workforce issues. Many sectors, particularly hospitality, are currently challenged by a number of recruitment issues including skills shortages and low levels of attraction and retention among suitably skilled staff. Training for the local workforce, and the role of this training package, is therefore of foremost consideration in addressing the current skills issues experienced by the sectors, and supporting them in reaching their forecasted economic potential.

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, IRC member input and expertise, feedback received via public consultation, and an industry analysis of both new and emerging workforce skills needs overseen by the Tourism, Travel and Hospitality IRC.

The sector is currently experiencing several challenges which are impacting workforce skills. Some of the main issues include:

- **Workforce shortages in food trade occupations**
  - Demand for skilled food trade workers such as chefs, bakers and pastry cooks (pâtissiers) is strong. However, applicant numbers are low and nearly all areas across Australia, particularly regional areas, are experiencing workforce shortages. Employment opportunities within the hospitality sector cater to a range of individuals with different backgrounds and abilities. Nevertheless, employers in particular note continually high job vacancy rates, and businesses are struggling to recruit individuals with the right skills.
- **Skills training does not reflect current industry practices** – Employers have voiced to various associations, including the Australian Culinary Federation (ACF), a peak body representing chefs,

cooks, apprentices and culinary students, that workers entering the industry after completing their qualification (or apprenticeship) lack contemporary skills in food preparation. This includes an understanding of the latest technologies and techniques applicable to the preparation and cooking of food, as well as those required for running a business.

- **Working across the cookery sector** – The transition of workers across sectors is common, and career progression no longer takes the traditional linear pathway. The commercial cookery sector is no different, and its workforce can now experience multiple hospitality environments, ranging from fine dining restaurants and clubs to catering to mine sites and other mass operations.
- **Lack of business and commercial skills in graduates** – Employers have indicated that, after finishing a qualification (or an apprenticeship), workers may be required to run a small operation within a business environment, which may include rostering junior staff, ordering stock or other business functions. Skilling cookery graduates to the level that they can run a small operation in its entirety and/or run a section of a larger operation is important, and needs to be reflected in the training package.
- **Issues in demonstrating competency** – There is a need to review the assessment criteria and requirements so that learners adequately demonstrate competency prior to the completion of their qualifications. Improving the assessment process is essential to ensuring that graduates can actually carry out that which their qualifications state should be within their ability.
- **Heightened customer expectations** – The customer landscape has been evolving in line with wider industry trends regarding globalisation, technology and innovation and, as a result, the public is now equipped with a wealth of knowledge. Customer loyalty to brands and services is diminishing, and the ability to exceed customer expectations is now essential across all

touch-points of the customer journey. Employers need a workforce which is skilled to a level where it can support business growth and meet customer expectations regarding customer service, engagement (i.e. via online and social media), and experiences (i.e. tourism and dining).

- **Legislative changes affecting access to overseas workers** – The tourism, travel and hospitality sector's structure is borderless, and the nature of its operations make it an internationally-operative industry. Changes to visa eligibility conditions reducing access to overseas workers, however, mean that employers need to use alternative channels for filling vacancies, including training pools of local employees with 'job-ready' skills.

To address these workforce skills issues and the sector's training requirements, a thorough update of the following qualifications and skill sets is proposed to be conducted in 2018–19:

#### 10 Qualifications:

Code	Qualification Title
SIT20416	Certificate II in Kitchen Operations
SIT20516	Certificate II in Asian Cookery
SIT30816	Certificate III in Commercial Cookery
SIT30916	Certificate III in Catering Operations
SIT31016	Certificate III in Patisserie
SIT31116	Certificate III in Asian Cookery
SIT40516	Certificate IV in Commercial Cookery
SIT40616	Certificate IV in Catering Operations
SIT40716	Certificate IV in Patisserie
SIT40816	Certificate IV in Asian Cookery



#### 5 Skill Sets:

Code	Qualification Title
SITSS00054	Kitchen Management
SITSS00057	Supervision of Cookery Apprentices
SITSS00050	Food Handling
SITSS00051	Food Safety Supervision
SITSS00052	Hospitality Compliance

The proposed industry response aims to ensure that the hospitality sector (and indirectly, all other sectors associated with it, including tourism, travel and accommodation) will support continued upskilling of the workforce, and help employers enhance productivity and competitiveness nationally and internationally.

# Sector Overview

The sectors supported by the Tourism, Travel and Hospitality Training Package cover significant people-facing industry areas in Australia, including:

- Tourism
- Travel
- Events and exhibitions
- Accommodation – hotels, holiday parks and resorts
- Hospitality.

Each sector comprises a diverse range of activities and service offerings to domestic and international markets, as well as different types of business entities, workforce profiles and, consequently, workforce skills needs. The sectors, however, are also very much interconnected and therefore incidences and/or fluctuations experienced in one sector will have, to varying degrees, an impact on the other sectors. An overview of each key sector is provided below, together with an overview of the workforce.

## Tourism

Tourism encompasses a broad range of service areas, ranging from transport and accommodation to retail, food, the arts and recreation. Tourism activities therefore overlap a number of different sectors, and estimates available on the potential revenue and economic contribution of activities can vary depending on definitions applied to identify those activities. Examples of definitions as outlined by the two main sources referenced in this section are as follows:

*Tourism comprises the activities of visitors. A visitor is defined as any person 'taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited'.*

*As a result, the term 'tourism' in the international standards is not restricted to leisure activity. It also includes travel for business or other reasons, such as education, provided the destination is outside the person's usual environment.*

*Aggregates in the TSA [Tourism Satellite Account] refer only to the tourism **direct** impact on the*

*economy, as indirect effects of tourism consumption are out of scope in the satellite account. A direct impact occurs where there is a direct relationship between the visitor and the supplier.*

### **Tourism Research Australia (Tourism Satellite Account 2016–17: Summary of Key Results, Tourism Research)**

*Industry firms mainly provide services to international and domestic visitors on trips shorter than one year. Visitors include those travelling for work-related purposes, such as conferences, and for leisure and personal reasons, such as visiting friends and relatives.*

### **IBISWorld (Industry Report Tourism in Australia)**

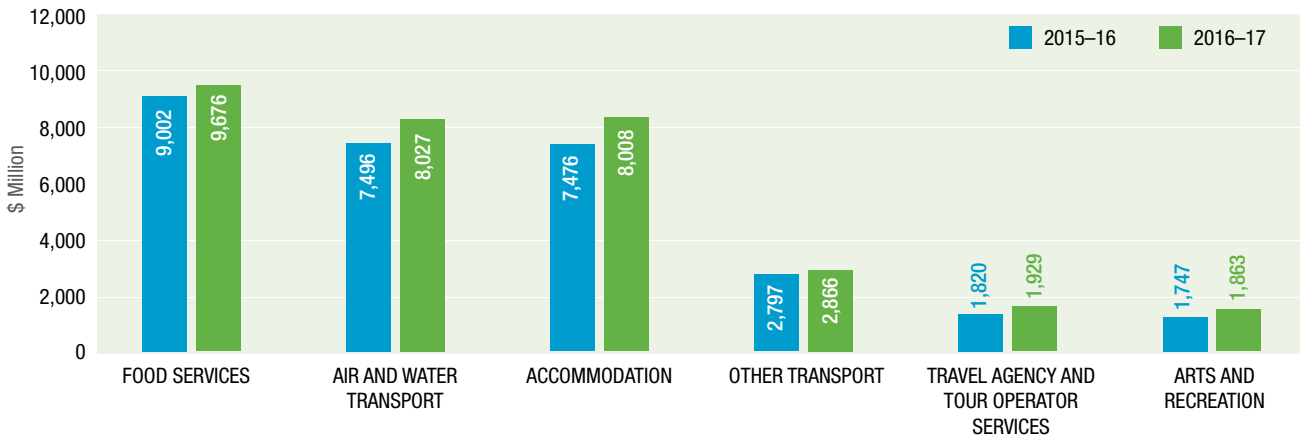
A consistent theme across the definitions, however, indicates that the sector generally represents the delivery of **services to visitors (international and domestic)** who travel for **personal, leisure and/or business-related purposes**.

Overall during the last financial year, tourism generated a total revenue for Australia of \$129.5 billion,<sup>1</sup> representing 3.1% of Australia's real Gross Value Added (GVA).<sup>2</sup> The sector is a key (and growing) contributor to Australia's economy, and one of Australia's largest service exports, accounting for 10% of all Australian exports in 2016–17.<sup>3</sup> The impact of different sectors on tourism is significant (see Figure 1). Over \$9.6 billion of Tourism GVA was driven by food services activities (i.e. hospitality) with an additional \$8 billion attributed to air and water transport, and \$8 billion to accommodation. Hospitality, transport and accommodation are sizeable industries for Australia (for example, the accommodation and food services' GVA is worth over \$40 billion<sup>4</sup>), and therefore tourism qualifications within this training package can support multiple secondary sectors, and their growth.

Tourism's economic contribution is expected to continue to grow, with revenue projections showing steady growth trends at a rate of 3% annually over the next five years (2018–2023).<sup>5</sup>

For the year ending December 2017, Australia hosted **8.1 million international visitors**, which is equivalent to an

**Figure 1** Tourism Contribution by Sector (\$million) - 2015–2016 and 2016–17



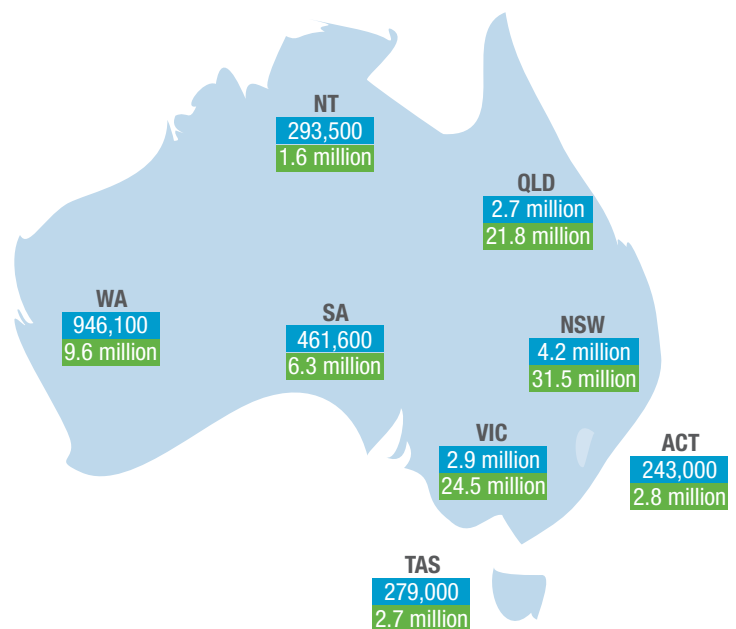
Source: Tourism Satellite Account 2016–17: Summary of Key Results Tourism Research Australia, Canberra.

increase of 6.5% from the previous year.<sup>6</sup> Domestic travel was also substantial, with Australians making **97.2 million overnight trips** between December 2016 and December 2017 and noting a similar increase year-on-year of 7%.<sup>7</sup> Across the country, New South Wales registered the highest number of international visitors (4.2 million) and overnight trips for Australians (31.6 million), with Victoria and Queensland registering the second and third highest volumes (see Figure 2). All states and territories except Western Australia noted increases in the volume of international visitors and domestic overnight stays since December 2016.

Overall spend in relation to tourism activities is significant, with international visitors spending \$41.2 billion in Australia, and domestic travellers an additional \$64.5 billion for overnight trips. The benefits to the Australian economy are widespread, with almost half of all visitor spend going to regional Australia.<sup>8</sup>

Tourism Research Australia’s forecasts predict total tourism spend will provide a \$225 billion stimulus to Australia’s economy in 2026–27, almost double the \$123 billion reported in 2016–17. This will be as a result of **117 million overnight trips** and **247 million day trips** by both Australian travellers and international visitors combined.<sup>9</sup>

**Figure 2** Total Number of International Visitors Overnight Trips of Domestic Visitors – December 2017



Source: International Visitor Survey Results for year ending December 2017, Tourism Research Australia, Canberra.  
Travel by Australians for year ending December 2017, Tourism Research Australia, Canberra.



Almonta Beach, Coffin Bay National Park, SA  
South Australian Tourism Commission  
Image courtesy of Tourism Australia

During the last decade, tourism in Australia was supported by a number of national long-term government strategies and policies. State, territory and industry association programs and campaigns also encouraged the sector to reach its potential in economic activity, contribution and employment. Starting with the National Long-Term Tourism Strategy (NLTS) (2009) and followed by both the Tourism 2020 strategy (2011) and Tourism Australia's 'There's Nothing Like Australia' global marketing campaign, tourism continues to be a national priority recognised for its export potential and for reducing the country's trade deficit.<sup>10</sup>

## TOURISM 2020

- SIX STRATEGIC AREAS:

- 1 Grow demand from Asia
- 2 Build competitive digital capability
- 3 Encourage investment and implement the regulatory reform agenda
- 4 Ensure tourism transport environment supports growth
- 5 Increase supply of labour, skills and Indigenous participation
- 6 Build industry resilience, productivity and quality.

Source: Australian Trade and Investment Commission (Austrade), Tourism Australia





### Tourism Workforce

There are **279,000 businesses** involved in tourism in Australia, with the majority representing small and 'micro' business types (i.e. employing fewer than 20 people).<sup>11</sup> The sector's contribution to employment levels is significant, registering a **workforce of nearly 600,000 workers** in 2016–17. This is equivalent to approximately 5% of all jobs in Australia, and more than 2.5 times the size of the mining workforce, another important contributing sector to Australia's economy. The workforce is characterised by a high proportion of part-time contracts (47%, compared to 32% for the Australian labour force as a whole<sup>12</sup>).

Food services and accommodation employ the largest cohorts in tourism, accounting for 49% of the workforce (see Figure 3). The occupations across the sector are diverse, and those supported by the training package can include tourism consultant, travel consultant, tour guide/operator, tour manager, outdoor recreation guide, booking agent, visitor information officer, marketing manager and sales executive.

The sector is faced with a number of international and domestic market and workforce challenges. These include adapting to international events, fluctuating currency values, advancements in technology, staff turnover and skills mismatch. These and other issues are further discussed in the section Challenges and Opportunities.

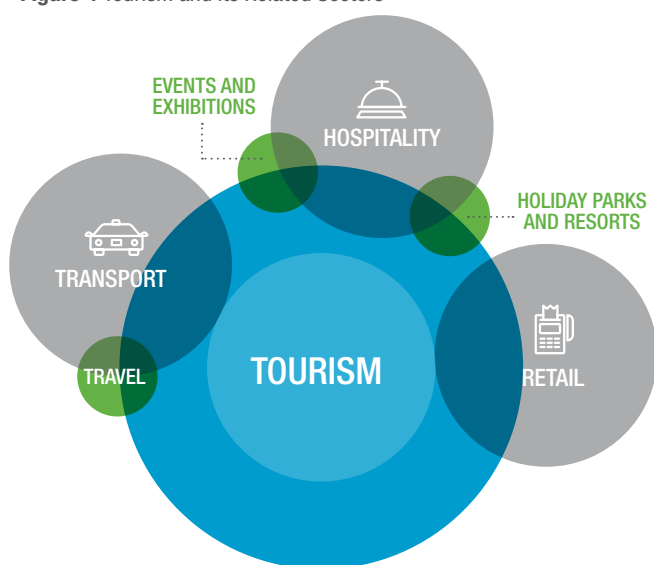
Figure 3 Tourism Employment by Sector, 2016-17 - Persons



Source: Tourism Research Australia (2017),  
Tourism Satellite Account, 2016-17

Tourism also features a complex combination of overlapping sectors (see Figure 4). Each sector faces its own challenges and consumer-driven forces that impact on workforce issues. These are covered in the continuing sections.

**Figure 4** Tourism and its Related Sectors



## Travel

The travel sector represents those firms involved in providing travel information, reservations and booking services for transport, accommodation and tourist attractions to individuals and business travellers. According to the latest IBISWorld Industry Report, there are **approximately 6,400 businesses** (October 2017) involved in travel agency and tour arrangement services. Nearly 3,000 are accredited by the Australian Federation of Travel Agents (AFTA) Travel Accreditation Scheme (ATAS) and represent agencies involved in corporate travel, online travel, wholesaling, and retail leisure travel.<sup>13</sup> Compared to other sectors discussed in this report, this sector has noted a higher rate of growth in revenue during the past five years of 5% per annum, and is **valued at \$8.3 billion**.<sup>14</sup>

Technological advancements and accessibility ranging from the Internet of Things (IoT) to mobile devices have seen the sector shift significantly from predominantly

bricks-and-mortar travel agents to incorporating online travel booking services for all forms of travel and accommodation. The two key players in this market include Expedia Australia Pty (having 28% of the market share), representing popular brands such as lastminute.com.au, hotels.com, and wotif.com, and Booking.com (Australia) Pty (with 25.3% of the market). Estimated to generate revenue valued at \$1 billion, growth trends show the sector has registered annual revenue increases of 17.7%, and it will continue to surpass the growth rates of other related industries forecasted at 8.5% over the next five years.<sup>15</sup> However, it is noted that many bricks-and-mortar travel agencies also operate an online booking channel as part of their business model.

Another area of development which has been impacting the travel sector has been the growth in demand for cruise shipping holidays. Cruise shipping now plays an important role in the Australian economy, with most ports across the country at full capacity in servicing local and world cruise line dockings. Between 2014–15 and 2015–16, the number of cruise ship visits in Australia increased by 15.9%, reaching over 1,000 visits in one year.<sup>16</sup> The increase in popularity of cruising has seen a growing need for providers of travel and holiday services (and specifically individuals in occupations such as travel agents) to have an understanding and knowledge of the cruise industry, including the various cruise liners, ports and schedules of tours available. In order to capitalise on the growth of cruise holidays, travel agents require a workforce which can provide customers with adequate advice and information so they can take bookings via their operations.

## Travel Workforce

Just over 28,000 full-time equivalent (FTE) staff are employed by Australian travel agents, with 19,830 in travel consultant roles.<sup>17</sup> It is predominantly a female workforce, with 70% of workers female and 30% males. Similar to other sectors covered by this training package, it is characterised by a high proportion of part-time workers (42%). While travel consultants (in frontline positions) make up the majority of job roles in the sector, other popular employment roles include business

development/sales and administration positions.<sup>18</sup> The online travel service sector employs approximately 2,000 individuals, and the workforce will continue to increase with the strong growth rates forecasted for the sector.<sup>19</sup>

## Events and Exhibitions

Australia has been experiencing significant growth during the last few years in this sector, and the schedule of events and exhibitions planned across the country is comprehensive. These events represent extremely varied gatherings, targeting both business and leisure-purpose international and domestic visitors. Examples are:

- Art exhibitions and shows
- Community events
- Concerts and performances
- Festivals and celebrations
- Food and wine events
- Sports events
- Business conferences and seminars
- Trade and consumer exhibitions.

Commercially, the sector facilitates face-to-face platforms for businesses to showcase products and services and engage directly with consumers, as well as promote trading and transactions. This sector potentially affects all industries as all types of organisations, including government, can be involved in running and/or attending an industry-related event. Across Australia, business and economic-related events run by private enterprises represent approximately one-third (32%) of demand for services in event promotion and management services. Those run by industry associations account for approximately one in four (26%), with government representing 11% of demand for business events.<sup>20</sup>

Organising and running events and exhibitions can involve a vast number of activities, as well as a large number of individuals and businesses at different points in the planning and execution process. It can involve organisers, venues, and a range of suppliers in ticketing, transport, IT, catering, cleaning, design and printing, and marketing. The impact of the sector, however, goes

beyond the actual event taking place. Attendance at events can generate additional demand for infrastructure and transport (i.e. flights, trains and taxis), as well as triggering demand for products and services in the local area where the event is held, including accommodation, food and beverages, and attractions.

In 2017, the exhibition and conference centres sector in Australia alone is estimated to have generated revenue to the value of \$11.3 billion,<sup>21</sup> with organisations involved in event promotion and the management services sector generating an additional \$3.2 billion in revenue.<sup>22</sup> Approximately five years ago (in 2013–14) it was estimated that more than 37 million people attended over 412,000 business events in Australia, generating \$28 billion in direct expenditure. The business events industry's direct value-add to the economy was estimated to be \$13.5 billion.<sup>23</sup> Today, these figures will be significantly higher as the sector has been experiencing steady growth at an annual rate of 2.9% over the last five years.<sup>24</sup>

Australian exhibition organisations are optimistic about the future, and strong growth is projected for the sector overall. An international survey conducted by The Global Association of the Exhibition Industry called the *UFI Global Exhibition Barometer* shows that three-quarters (74%) of exhibition organisations are expecting their turnover to increase in the second half of 2018.<sup>25</sup> Business confidence is a key driver for demand and so with two-thirds (66.6%) of organisers and association organisers intending to deliver new exhibitions, particularly new trade shows,<sup>26</sup> the sector is expected to experience positive growth in the future.

### Events and Exhibitions Workforce

Nearly 180,000 jobs were generated in 2013–14 as a result of business events. Today, this volume is expected to be significantly higher.<sup>27</sup> Employers who represent the events industry sector include businesses involved in event and/or meeting management, venue owners, hotels/venues with accommodation, audio-visual/production organisations and exhibition suppliers.<sup>28</sup> Some examples of the occupations involved in supporting events and exhibition sector activities include event or exhibition assistants, conference or engagement coordinators, venue coordinators and/or organisers.



Image courtesy of Tourism Australia



The skills and knowledge areas of the workforce are varied and can cover:

- Exhibition directorship
- Event organisation and show management
- Sales and business development
- Marketing and sponsorship
- Project management
- Design and stand building
- Audio-visual/production services
- Food & beverage (hospitality) services
- Customer engagement
- Event community building
- Creative design
- Event technology
- Manual labour.

## Accommodation - Hotels, Holiday Parks and Resorts

This sector is the accommodation provider for the tourism and travel sectors, and can represent everything from five-star resorts and luxury hotels to motels, caravan parks and camping grounds. **Hotels and resorts** represent the highest revenue source for the sector (\$7.9 billion),<sup>29</sup> followed by **motels** (\$3 billion)<sup>30</sup> and **caravan parks and camping grounds** (\$1.2 billion).<sup>31</sup>

Inbound tourism is a significant driver for the hotel sector, and China is now Australia's most valuable inbound market. Chinese visitors tend to stay in hotels longer and spend more per visit than visitors from other countries.<sup>32</sup> Stays in holiday parks and resorts are driven mainly by the domestic traveller, and this is especially the case for caravan and camping visits. Domestic caravan and camping visits represented 11.58 million trips and 49.78 million nights for the year ending March 2017.<sup>33</sup> Caravanning and camping stays have benefited from the depreciation of the Australian dollar, influencing residents to stay in Australia and travel locally. Other drivers of demand for camping and caravanning include the country's ageing population, with older travellers and retirees using their accumulated income and available time to travel the country and stay in caravan parks.

Airbnb has had (and is continuing to have) an impact on the accommodation sector, shifting demand for

accommodation services away from hotels and to private dwellings and rental services.<sup>34</sup> Direct bookings of holiday houses and flats with owners via Airbnb has affected, in particular, small operators running holiday rental properties, bed & breakfasts, and backpacker hostels. Airbnb's contribution to Australia's Gross Domestic Product (GDP) is estimated to be \$1.6 billion, accommodating approximately 2.1 million guests and representing 3.7 million nights.

### Accommodation Workforce

Employment across the accommodation industry is significant, with the most recent figures showing it reached 114,100 workers in May 2017.<sup>35</sup> Forecasts show the industry is expected to grow steadily and experience an increase in employment of 5.7% between 2017 and 2022, which is equivalent to an additional 6,500 jobs. Employment levels in 2017–18 within sub-sectors of the accommodation industry were:<sup>36</sup>



The Airbnb workforce is estimated to represent over 14,000 jobs, and it has been growing exponentially since it was launched in Australia in 2012.<sup>37</sup> It is a key player in the industry which is not only shaping trends within the accommodation sub-sector, but within the overall tourism industry in general.

Roles to support accommodation providers can be varied, ranging from resort/holiday park managers and marketing roles, to groundskeepers, handypersons and housekeepers. Please refer to the Employment and Skills Outlook section which follows for further information regarding employment across specific occupations.



Melbourne, VIC  
Visit Victoria  
Image courtesy of Tourism Australia

## Hospitality

Hospitality represents a range of service types and businesses, with examples including:

- Restaurants
- Cafés and coffee shops
- Pubs, bars and nightclubs
- Casinos.

IBISWorld Industry Reports estimate the total value of the revenue generated from the four areas listed above to be approximately \$52 billion, with restaurants generating the highest revenue value of \$20 billion (equivalent to 39%). The sector has been growing steadily during the past five years, which for businesses has meant a regular increase in competition. Industry has attributed the growth of entrants to the market to factors such as the growing 'foodie' culture; the popularity among many individuals of owning a hospitality business; population growth; and, to some extent, an increase in consumer demand.<sup>38</sup> A large proportion (83.5%) of hospitality businesses expect their revenue to increase at least by a little or else by a lot during the next 12 months, and their top area for

investment will be in staff (72%), followed by marketing (65%) and furniture and fit-outs (56%).<sup>39</sup>

### Hospitality Workforce

The workforce, as represented by the Australian Bureau of Statistics' (ABS) Australian and New Zealand Standard Industrial Classification (ANZSIC) for Food and Beverage Services, employs 754,600 people. Cafés, restaurants and takeaway food services represent the largest proportion of employment in this sector (equivalent to 81% of total employment, and an employment level of 610,900).<sup>40</sup> Over the next five years, employment is expected to grow significantly, by 12.1%, which is equal to an additional 91,000 jobs.<sup>41</sup> The most popular occupations within the industry are waiters, kitchenhands, bar attendants and baristas, chefs, and café and restaurant managers. Sources of labour expected to address this large future demand include both domestic labour supplies and overseas workers at skilled, semi-skilled and unskilled levels.

The most recent Australian Tourism Labour Force Report<sup>42</sup> indicated that 90% of employees in the tourism and

hospitality workforce were Australians (either local, intrastate or interstate), and the balance (of 10%) were overseas workers (either skilled, semi-skilled, students or working holidaymakers). Please refer to the Employment and Skills Outlook section which follows for further information regarding employment across specific occupations.

### Nationally Recognised SIT Tourism, Travel and Hospitality Qualifications - as at June 2018

A total of 33 VET qualifications cater to this combined sector and are as follows:

- SIT10116 Certificate I in Tourism (Australian Indigenous Culture)
- SIT10216 Certificate I in Hospitality
- SIT20116 Certificate II in Tourism
- SIT20216 Certificate II in Holiday Parks and Resorts
- SIT20316 Certificate II in Hospitality
- SIT20416 Certificate II in Kitchen Operations
- SIT20516 Certificate II in Asian Cookery
- SIT30116 Certificate III in Tourism
- SIT30216 Certificate III in Travel
- SIT30316 Certificate III in Guiding
- SIT30416 Certificate III in Holiday Parks and Resorts
- SIT30516 Certificate III in Events
- SIT30616 Certificate III in Hospitality
- SIT30716 Certificate III in Hospitality (Restaurant Front of House)
- SIT30816 Certificate III in Commercial Cookery
- SIT30916 Certificate III in Catering Operations
- SIT31016 Certificate III in Patisserie
- SIT31116 Certificate III in Asian Cookery
- SIT40116 Certificate IV in Travel and Tourism
- SIT40216 Certificate IV in Guiding
- SIT40316 Certificate IV in Holiday Parks and Resorts
- SIT40416 Certificate IV in Hospitality
- SIT40516 Certificate IV in Commercial Cookery
- SIT40616 Certificate IV in Catering Operations

- SIT40716 Certificate IV in Patisserie
- SIT40816 Certificate IV in Asian Cookery
- SIT50116 Diploma of Travel and Tourism Management
- SIT50216 Diploma of Holiday Park and Resort Management
- SIT50316 Diploma of Event Management
- SIT50416 Diploma of Hospitality Management
- SIT60116 Advanced Diploma of Travel and Tourism Management
- SIT60216 Advanced Diploma of Event Management
- SIT60316 Advanced Diploma of Hospitality Management.

### Registered Training Organisation Scope of Registration

Table 1 indicates the number of Registered Training Organisations (RTOs) with tourism, travel and hospitality qualifications on scope. This data is current as at June 2018, per the listing on the National Register of VET ([www.training.gov.au](http://www.training.gov.au)).

**Table 1** Number of RTOs by nationally recognised qualifications on scope – SIT Tourism, Travel and Hospitality Training Package Products

Qualification Code	Qualification Title	No. of RTOs with Qualification on Scope
SIT10116	Certificate I in Tourism (Australian Indigenous Culture)	23
SIT10216	Certificate I in Hospitality	199
SIT20116	Certificate II in Tourism	141
SIT20216	Certificate II in Holiday Parks and Resorts	6
SIT20316	Certificate II in Hospitality	445
SIT20416	Certificate II in Kitchen Operations	216
SIT20516	Certificate II in Asian Cookery	4
SIT30116	Certificate III in Tourism	91
SIT30216	Certificate III in Travel	55
SIT30316	Certificate III in Guiding	28
SIT30416	Certificate III in Holiday Parks and Resorts	13
SIT30516	Certificate III in Events	53
SIT30616	Certificate III in Hospitality	368
SIT30716	Certificate III in Hospitality (Restaurant Front of House) SIT30716 is a new qualification, not previously delivered	27
SIT30816	Certificate III in Commercial Cookery	205
SIT30916	Certificate III in Catering Operations	32
SIT31016	Certificate III in Patisserie	60
SIT31116	Certificate III in Asian Cookery	16
SIT40116	Certificate IV in Travel and Tourism	47
SIT40216	Certificate IV in Guiding	12
SIT40316	Certificate IV in Holiday Parks and Resorts	8
SIT40416	Certificate IV in Hospitality	192
SIT40516	Certificate IV in Commercial Cookery	187
SIT40616	Certificate IV in Catering Operations	4
SIT40716	Certificate IV in Patisserie	47
SIT40816	Certificate IV in Asian Cookery	12
SIT50116	Diploma of Travel and Tourism Management	73
SIT50216	Diploma of Holiday Park and Resort Management	7
SIT50316	Diploma of Event Management	66
SIT50416	Diploma of Hospitality Management	272
SIT60116	Advanced Diploma of Travel and Tourism Management	30
SIT60216	Advanced Diploma of Event Management	26
SIT60316	Advanced Diploma of Hospitality Management	122

Source: Training.gov.au. RTOs approved to deliver this qualification. Accessed 6 June 2018.





## Qualification Enrolments and Completions

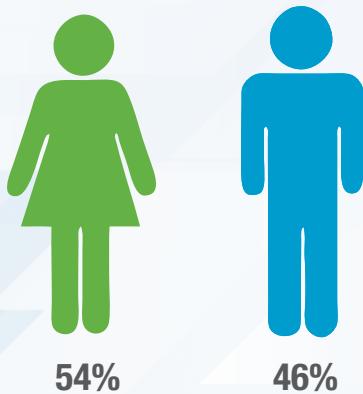
In 2016, there were approximately 15,100 enrolments across all VET qualifications catered for by the tourism, travel and hospitality training package products. The most popular qualifications in 2016 were the *Certificate II and III in Hospitality*, together representing 40% of all training package qualification enrolments (and equivalent to 2,482 and 3,674 enrolments, respectively).

An overview of key traits of the *SIT Tourism, Travel and Hospitality Training Package* enrolments for 2016 is provided below, followed by a breakdown of enrolments and completions for individual qualifications (see Table 2).

### 2016 ENROLMENT SNAPSHOT

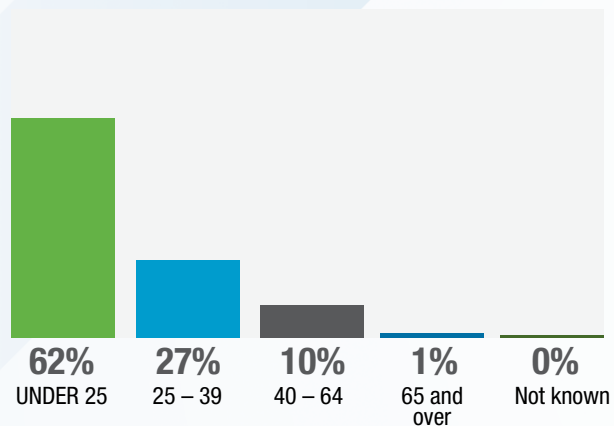
### TOURISM, TRAVEL AND HOSPITALITY TRAINING PACKAGE PRODUCTS

#### GENDER

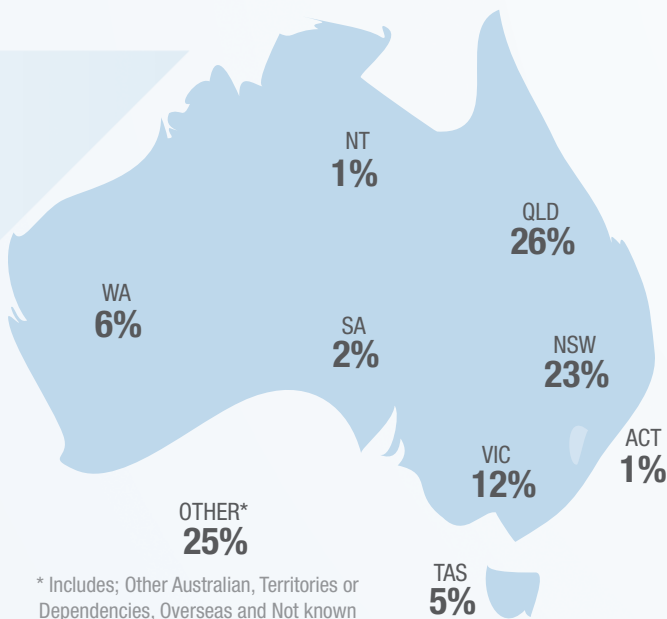


#### AGE

Percentage Years of age

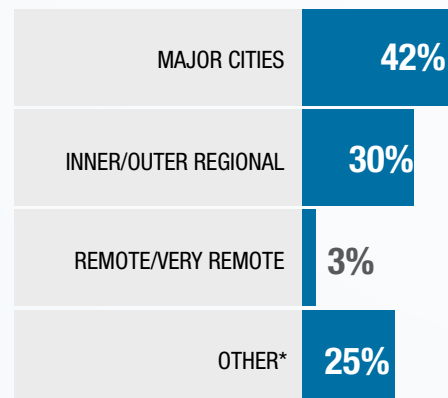


#### STATE/TERRITORY OF RESIDENCE



\* Includes; Other Australian, Territories or Dependencies, Overseas and Not known

#### STUDENT REMOTENESS REGION (2011 ARIA+)




\* Includes; Outside Australia and Not known

Source: NCVET VOCSTATS (Program enrolments 2016 by various breakdowns)  
Base count n = 15,111

## General notes on statistics

1. Enrolment and completion data is sourced from NCVER VOCSTATS (program enrolments and completions 2016), accessed November 2017.
2. It is important to note that not all training providers are currently required to submit enrolment and completion data through the NCVER VOCSTATS database, and therefore some figures presented may under-represent the true number of enrolments and completions for a qualification. From 2018, all training providers will be 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.
3. Figures reflect public and private RTO data.
4. Completion data for 2016 represents preliminary outcomes (i.e. not a full year)
5. 'E' represents Enrolment.
6. 'C' represents Completion.
7. Superseded qualifications, and their respective enrolment and completion data, are not tabled.



National Park, Norfolk Island  
Norfolk Island Tourism  
Image courtesy of Tourism Australia

**Table 2** Total number of enrolments (Total VET Activity [TVA]) and completions by nationally recognised qualifications in scope – SIT Tourism, Travel and Hospitality Training Package, 2016

QUALIFICATION CODE	QUALIFICATION TITLE	E/C	2016
SIT10116	Certificate I in Tourism (Australian Indigenous Culture)	E	35
		C	8
SIT10216	Certificate I in Hospitality	E	737
		C	214
SIT20116	Certificate II in Tourism	E	651
		C	113
SIT20216	Certificate II in Holiday Parks and Resorts	E	0
		C	0
SIT20316	Certificate II in Hospitality	E	2,482
		C	415
SIT20416	Certificate II in Kitchen Operations	E	465
		C	124
SIT20516	Certificate II in Asian Cookery	E	0
		C	0
SIT30116	Certificate III in Tourism	E	362
		C	39
SIT30216	Certificate III in Travel	E	365
		C	125
SIT30316	Certificate III in Guiding	E	27
		C	10
SIT30416	Certificate III in Holiday Parks and Resorts	E	5
		C	0
SIT30516	Certificate III in Events	E	45
		C	7
SIT30616	Certificate III in Hospitality	E	3,674
		C	399
SIT30716	Certificate III in Hospitality (Restaurant Front of House)	E	42
		C	0
SIT30816	Certificate III in Commercial Cookery	E	1,991
		C	190
SIT30916	Certificate III in Catering Operations	E	22
		C	0
SIT31016	Certificate III in Patisserie	E	74
		C	4

QUALIFICATION CODE	QUALIFICATION TITLE	E/C	2016
SIT31116	Certificate III in Asian Cookery	E	43
		C	4
SIT40116	Certificate IV in Travel and Tourism	E	56
		C	13
SIT40216	Certificate IV in Guiding	E	5
		C	0
SIT40316	Certificate IV in Holiday Parks and Resorts	E	0
		C	0
SIT40416	Certificate IV in Hospitality	E	553
		C	35
SIT40516	Certificate IV in Commercial Cookery	E	869
		C	304
SIT40616	Certificate IV in Catering Operations	E	0
		C	0
SIT40716	Certificate IV in Patisserie	E	51
		C	35
SIT40816	Certificate IV in Asian Cookery	E	6
		C	9
SIT50116	Diploma of Travel and Tourism Management	E	228
		C	14
SIT50216	Diploma of Holiday Parks and Resorts	E	0
		C	0
SIT50316	Diploma of Event Management	E	327
		C	9
SIT50416	Diploma of Hospitality Management	E	1,115
		C	279
SIT60116	Advanced Diploma of Travel and Tourism Management	E	22
		C	0
SIT60216	Advanced Diploma of Event Management	E	15
		C	3
SIT60316	Advanced Diploma of Hospitality Management	E	847
		C	84

Source: NCVER VOCSTATS, accessed November 2017.

## Businesses Involved

Businesses operating in the service areas supported by this training package represent a range of public and private, small, medium and large enterprises, and are spread all across the country. A summary count of some of the key business types involved in the employment of the workforce with the qualifications in this training package is provided below.<sup>43</sup>

- **Tourism: 278,977 businesses** <sup>44</sup>

This business count is derived by Tourism Research Australia using the Australian Bureau of Statistics (ABS) Business Register (unpublished) data (ABS Cat. No. 8165.0). It represents businesses in multiple industries, including accommodation, transport, travel agency and tour operator services, cultural services, casinos and other gambling services, other sports and recreation services, and other retail trade. Due to the difference in definitions between sources, this figure is not mutually exclusive to the count of businesses provided in other categories.

- **Event Promotion and Management Services: 4,447 businesses**

Businesses that provide event management, event promotion and ticketing services. They can also include tourist information centres.

- **Exhibition and Conference Centres: 2,181 businesses**

Businesses that organise and/or host exhibitions and conferences.

- **Amusement Parks and Centres: 922 businesses**

Businesses representing amusement or theme parks which offer attractions such as mechanical rides, water slides, games, shows and theme exhibits. These also include arcades, centres or parlours which are permanently located within a venue and offer coin-operated games, such as pinball.

- **Travel Agency and Tour Arrangement Services: 6,409 businesses**

Businesses that provide travel information, reservation and booking services for transport, accommodation and tourist attractions to individuals and business

travellers. The industry also includes internet travel booking services.

- **Online Travel Bookings Only: 48 businesses**

Businesses that provide online travel reservation and booking services, taking a proportion of the total transaction value booked through their websites. This count excludes businesses that also have a physical retail presence.

- **Caravan Parks and Camping Grounds: 1,320 businesses**

Businesses that run powered and unpowered holiday parks, caravan parks and camping grounds that provide short-term and/or long-term accommodation.

- **Hotels and Resorts: 373 businesses**

Businesses including hotels and resorts that have more than 15 rooms. They are licensed to operate a public bar and provide accommodation on a room or suite basis. Accommodation provided by casinos is not included in this count.

- **Motels: 1,948 businesses**

Businesses including motels and guesthouses with 15 or more rooms. They provide accommodation in the form of rooms or suites.

- **Holiday Houses, Flats and Hostels: 762 businesses**

Businesses operating rented houses and apartments, bed & breakfast accommodation and backpacker hostels for short-term rentals. Properties or rooms on accommodation-sharing platforms such as Airbnb are not included in this count.

- **Restaurants: 24,440 businesses**

Businesses that mainly provide food and beverages for consumption on the premises. It includes licensed, unlicensed and BYO restaurants.

- **Cafés and Coffee Shops: 14,286 businesses**

Businesses representing cafés and coffee shops that serve food and beverages to customers. This count excludes takeaway food services, restaurant and catering services, theatre restaurants and establishments that primarily sell alcohol for consumption on and off premises.



- **Pubs, Bars and Nightclubs: 5,906 businesses**

Businesses that can sell alcohol for consumption either on the premises or off the premises.

- **Social Clubs: 2,851 businesses**

Businesses that represent gambling, sporting, recreational and social (such as RSL) clubs or associations that generate income predominantly from hospitality services. Clubs that mainly provide sporting services are not included in this count.

- **Wine Bars: 494 businesses**

Businesses including lounges and bars that prepare and serve wine for immediate consumption. They can also offer food options.

- **Casinos: 8 businesses**

Businesses that operate facilities with a range of gambling services such as table wagering games and electronic gaming machines. These businesses may also provide a range of other services including food and beverages and accommodation.

## Stakeholders

### National Peak Bodies and Key Industry Players

The following list represents a range of organisations that perform a variety of key roles in this sector. These organisations and their networks are well placed to offer industry insights at the time of training package review. Engagement and consultation activities will include a broad range of industry stakeholders beyond those included in this list.

- **Government departments and agencies**

- State and territory tourism organisations
- Regional tourism organisations
- Tourism Australia
- Austrade (The Australian Trade and Investment Commission)

- **Peak and industry associations**

- Accommodation Association of Australia
- Australian Culinary Federation
- Australian Federation of Travel Agents Ltd
- Australian Institute of Technical Chefs

- Australian Hotels Association
- Australian Regional Tourism Network
- Australian Tourism Export Council
- Caravan Industry Association of Australia
- Clubs Australia
- Exhibition and Event Association of Australasia
- Guiding Organisations Australia
- International Air Transport Association
- Institute of Australian Tour Guides
- Restaurant & Catering Australia
- Tourism Accommodation Australia
- Tourism Hospitality Catering Institute of Australia
- Tourism and Transport Forum Australia
- YHA Australia

- **Employee associations**

- United Voice
- Australian Services Union

- **Regulators**

- Food authorities in each state/territory
- Liquor and gaming authorities in each state/territory

- **Large and small employers across metropolitan, regional, rural and remote areas**

- **Registered Training Organisations (RTOs) both public and private.**

# Challenges and Opportunities

## Attraction and Retention

Nationally, recruitment and retention across the tourism, travel and hospitality sector has been an ongoing issue, with individual states and territories all experiencing challenges in employing suitably skilled staff. Data collected from businesses in the tourism sector suggests that there is an average vacancy rate of 7% across the sector, which translates to a shortage of approximately 38,000 positions.<sup>45</sup> This research suggests that, in the absence of any major policy changes to the industry, by 2020 approximately 123,000 new workers will be required to service the tourism industry, with the skilled labour shortage expected to rise to 30,000 workers.

The small business nature of the employers in the sector means that seeking career pathways within one employer's organisation is challenging and, as a result, employees move from one employer to another to realise their career aspirations. Compared to other industries, the labour force is characterised by a relatively young and casual workforce. According to the latest ABS data trends for February 2018, accommodation and food services employ approximately 881,500 persons, and casual modes of employment are not uncommon. Across the Accommodation and Food Services sector, 65% of employed persons are working without paid leave entitlements, making it the sector with the highest rates of casual work in Australia.<sup>46</sup> The median age for workers is 26 years, which is significantly lower than the national workforce average age of 40 years.<sup>47</sup> Young workers generally have other commitments that they prioritise such as full-time or part-time study, and issues relating to attitude and reliability are regularly raised by employers when it comes to impacting the retention of staff in the workplace.

The growing 'gig' economy means that individuals are increasingly working on a casual basis, and are managing their own earnings by working independently completing different gigs (i.e. tasks) rather than working in full-time positions. Casual contracts are obtained via digital platforms such as AirTasker, Uber, and Deliveroo, and this freelance economy is driving an individually-focused and self-motivated approach to work. The implications for

industry are that the workforce is perhaps more than ever less loyal and less committed to a place of employment, further increasing retention issues within this sector.

The casual workforce is also increasingly characterised by individuals with experience in industry. A recent survey conducted<sup>48</sup> of casual and contract workers showed that more than half (57%) had six or more years' experience. Factors such as those mentioned earlier regarding the shift from traditional permanent employment to gig employment, as well as the drive for a better work/life balance and an ageing population, mean that it is likely that casual work trends in these sectors will continue among all age groups.

The career pathways available in tourism, travel and hospitality can be endless. They can also be unknown, thereby creating further barriers to attracting suitably skilled staff. Individuals can start as a junior kitchenhand or operator and progressively move into roles involving leading or managing a team of staff as a head chef or marketing manager. Pathways specific to accommodation, events and exhibitions or travel careers can offer similar opportunities to individuals to move into positions of management and/or business ownership. The predominance of young and casual workers in the sectors can, in some cases, endorse the perception that the sector does not provide long-term career pathways. Industry needs to work on building and promoting visible career pathways to encourage new entrants to the industry and to retain existing workers.

## Mismatch of Skills (including Skills Shortages)

Workers with **mismatched qualifications** can represent situations of over-qualification, under-qualification or simply have qualifications misaligned to their job roles. A study conducted by SkillsIQ measured the cost of over-qualification to Australian workers to be valued at \$4.1 billion per year, and tourism was one sector where rates of over-qualification were high (i.e. 34% of workers within the tourism sector were over-qualified for their current positions).<sup>49</sup> Some of the issues surrounding over-qualification result in high staff turnover, which is an issue already discussed in detail in the previous section.





Business Events Australia Greater China Showcase, Melbourne VIC  
 tourism.australia.com  
 Image courtesy of Tourism Australia

The solution to addressing the challenge of over-qualified staff in positions within the sector is not straightforward. A number of suggestions put forward by individuals, education providers and employers are as follows:

- Individuals should consider pursuing qualifications that meet their career stage and which offer practical work experience, rather than favouring higher qualifications
- Education providers should better align qualifications to job roles and sectors in order, in turn, to aid student expectations regarding career pathways
- Employers should consider whether a candidate is suitably 'skills-ready' and take into account the practical skills he or she may have for a job role in preference to the attainment of advanced levels of qualifications.

Seven in ten employers (69%) in the sector have indicated that there are **skills deficiencies** among their workforces, and this has increased from an initial metric captured in 2011 of 50%.<sup>50</sup> Key factors driving the skills shortage experiences of employers include an individual's lack of

experience in tourism as well as a misalignment between the skills of the individual and the requirements of the role. Access to training, a lack of quality training or a high drop-out rate from training were also cited as contributing to some extent to the skills shortages of the sector.

**Table 3** Skills deficiencies reported by employers, by location 2015

State/Territory	Businesses identifying skills deficiencies in employees	Top deficiency identified
SA	75%	Capability misalignment
NSW	71%	Lack of experience
ACT	71%	Capability misalignment
Australia	69%	Lack of experience
WA	69%	Capability misalignment
QLD	68%	Capability misalignment
NT	68%	Business location
VIC	66%	Capability misalignment
TAS	59%	Lack of experience

All states and territories report problems with the skill levels of their employees. Of all the sub-sectors within the tourism industry, businesses in **café and restaurant** services reported the greatest labour market difficulties in terms of the recruitment and retention of staff relative to those in the accommodation or attraction industries.<sup>51</sup> South Australia (75%), New South Wales (71%) and the Australian Capital Territory (71%) reported the greatest skills deficiencies within the occupations of cleaners, chefs and cooks who are primarily lacking in qualifications, skills and work experience.<sup>52</sup>

Employers have been using the supply of an international workforce to help combat the skills shortages experience. However, changes in international visa eligibility conditions mean that employers will need to identify other channels for sourcing adequately skilled staff.

Overall, employers are struggling to fill vacancies and a key reason cited is due to an **applicant's lack of hard and/or 'soft' skills**.<sup>53</sup> Having a qualification, technical knowledge and content knowledge for a job role is important. The focus for employers, however, is now more than ever on **employability skills**:

- Communication
- Teamwork
- Problem solving
- Initiative and enterprise
- Planning and organising
- Self-management
- Learning
- Technology.

There is a need to ensure that training is available in key soft skills, identified above, as well as in entrepreneurial skills involving financial, resource and management skills, so that individuals can continue progressing in their industry. This is particularly important at a middle-management level as employees move from operational to supervisory and management roles. Industry reports that many new entrants do not have the requisite skills across all facets of business ownership and management to ensure the viability of these businesses.

## Seasonality

The impact of seasonality on the workforce is a major concern for tourism, travel and hospitality businesses. The Australian Tourism Labour Force Report found that, in 2015, **51% of tourism businesses were identified as being seasonal**<sup>54</sup> and therefore experienced fluctuations in business activities and employment throughout the year. The tourism sector is characterised by a low proportion of full-time workers (estimated to number approximately 35%),<sup>55</sup> and so seasonality trends can add an additional dimension of difficulty for employers in establishing a core workforce.

Workforce supply is therefore heavily reliant on multiple channels to fill short-term gaps by attracting mature, youth and overseas workers.<sup>56</sup> Government policy regarding overseas working visas can impact access to workers significantly, and the Working Holidaymaker program currently includes various visas to support the supply of overseas workers (i.e. the Working Holiday and Work and Holiday visas).

Labour mobility programs are also essential in supporting industry's recruitment of sufficient skilled workers. The Department of Foreign Affairs and Trade (DFAT) funds the Labour Mobility Assistance Program (LMAP) which supports the Seasonal Worker Programme (SWP) (administered by the Department of Jobs and Small Business), with a focused area dedicated to improving the supply and quality of seasonal workers.<sup>57</sup> Enterprises are also venturing upon their own labour mobility programs, with an example being the caravan and parks sector, which has begun rotating willing staff members between states and territories during peak and off-peak seasons.

In order to mitigate the issues involved in seasonality in the workforce, strategies to remove barriers to accessing overseas workers will be important. For example, removing or reducing limits and eligibility criteria for overseas workers, or targeting immigration programs to address seasonal demand in occupations,<sup>58</sup> will support alleviating recruitment pressures which employers in these sectors can experience several times a year.

## Ageing Population and Workforce

Australia, like most developed nations, is experiencing a long-term ageing of its population. The Australian Government's Intergenerational Report (IGR) shows that both the number and proportion of Australians aged 65–84 and 85 years and over are projected to grow substantially. In 2015, approximately 3 million people, or 13% of the population, were aged 65–84, and 500,000 people, or 2% of the population, were aged 85 years and over.<sup>59</sup> By 2054–55, the 65–84 cohort is projected to be around 7 million people, or just under 18% of the population. The population 85 years and over is projected to be around two million people, or 5% of the population.<sup>60</sup> Such substantial changes in the age of the population will certainly bring increasing pressures to bear upon the industry.

While Australia's senior population is growing steadily, so too is Australia's general population. Overall, the population grew by 1.6% during the year ended 30 June 2017.<sup>61</sup> Approximately 37% of this growth was due to natural increases while 63.2% was due to net overseas migration. Based on medium-level growth assumptions, Australia's population is projected to increase to 41.5 million people in 2061 and 53.6 million in 2101.<sup>62</sup>

With population trends of ageing and growth expected to continue steadily, managing workforce supply and demand will include the need for workforce planning to ensure staff volume and skills are in line with demand trends.

Given the large proportion of younger workers in sectors within the tourism, travel and hospitality industry, as mentioned earlier, there is a significant opportunity for these sectors to play a leading role in addressing issues relating to the ageing population and workforce, if suitable attraction and retention mechanisms are identified and implemented.

## Licensing and Regulation

The disparity of licensing and regulation regimes between the various jurisdictions across Australia has long presented challenges for businesses operating within

the tourism, travel and hospitality industry. Differences in requirements across all states and territories present significant challenges, particularly for businesses who operate nationally or across state/territory borders, in terms of the portability of skills and restrictions on the ability of workers to move between jurisdictions while performing the same job role.

One area expressed by industry where significant variability exists in the quality of training across jurisdictions relates to the Responsible Service of Alcohol (RSA). Currently, delivery of training varies widely across training providers, and the modes of delivery implemented are just as varied, ranging from a purely face-to-face model to one that is delivered wholly online. The *Review of the South Australian Liquor Licensing Act 1997* noted the existence of online courses that were being provided at a very low cost and which took little time to complete. The report questioned the ease with which qualifications with respect to the responsible service of alcohol were able to be obtained.<sup>63</sup>

The Australian Industry and Skills Committee (AISC) has commissioned a Case for Change to determine whether units of competency relating to the Responsible Service of Alcohol need to be updated to better meet the needs of industry in response to the issues outlined above. Work on this Case for Change has commenced, and it will be submitted to the AISC for consideration during the second half of 2018.

## Sustainability

Sustainable tourism is defined by the UN World Tourism Organisation as 'tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, and the environment and host communities.' It is a global trend and internationally recognised, with the United Nations declaring 2017 the *International Year of Sustainable Tourism for Development*. There is an increase in the number of consumers who want 'sustainable' tourism options which encompass both environmental considerations and social and economic sustainability. Key movements in sustainable tourism include:



Janbal Gallery, QLD  
 Tourism Australia  
 Image courtesy of Tourism Australia

- **Eco-tourism** – Eco-tourists primarily want to visit natural attractions and related cultural assets. To meet these expectations operators need to be skilled in land and parks management, and their operations and infrastructure need to be environmentally friendly. Their guides also need to be knowledgeable about local culture.
- **Organic product preferences** – These preferences have led to consumers having a greater interest in knowing the source of their food and a growing preference for restaurants that use locally- and regionally-sourced food options. As a result, more online solutions are emerging that enable consumers to track their food from farm to table.<sup>64</sup> Providing these experiences requires businesses to have the skills to operate in a sustainable manner – both in the way they deliver the service and also in managing their supply chain to the required standards.

Sustainable tourism involves a wide range of stakeholders including governments, industry associations, local communities, employers and workers in the industry. A skilled workforce is particularly key to ensuring individuals seeking sustainable experiences in tourism, travel and hospitality obtain the experience they are seeking, and that all resources are respected.

Effort is required to make sure operators have the skills and knowledge to deliver the current and upcoming demands of the public. Management and leadership skills, strategic planning, financial literacy and mentoring and coaching skills are among those identified as being critical to building and maintaining a sustainable tourism, travel and hospitality industry.

### Cultural Tourism

Culture, and experiencing different customs and interactions with locals, is for many a key driver for travelling. Just over three-quarters of global travellers are influenced by the allure of visiting somewhere new, and experiencing local culture is a big priority.<sup>65</sup>

Australia offers some of the most unique and culturally rich experiences through its Aboriginal culture, and Indigenous experiences are an opportunity for huge growth as they are seen to be authentic and unique to the area in which they occur.<sup>66</sup> The connection with meaningful Aboriginal and Torres Strait Islander cultural experiences is a unique selling point for Australia. A recent study conducted by the Northern Territory Government showed that more than two-thirds (67%) of visitors to the area want to visit sacred rock art sites, 64% want to



learn about Aboriginal beliefs and connection to the land ('country'), and 60% want to hear stories about the Dreamtime.<sup>67</sup> Skills development is required to help meet the increased demand for these experiences, including those skills needed to explain and showcase these sorts of experiences so that they can then be tailored to the specific local experiences in a given area. Employment of Aboriginal and Torres Strait Islander people from regional and remote communities is a particularly important factor in supporting cultural tourism in Australia. Many Indigenous sites and cultural experiences are located in remote and Indigenous communities, so tours and hospitality services in the area are uniquely positioned to positively influence communities through the offer of employment opportunities. Career pathways can be established to support the transition from casual tour operator roles into management positions within tourism businesses. Remote locations, however, often face the twin impediments of distance and the availability of certified trainers prepared to work in remote locations, and so workforce training can be challenging.

Language and cultural awareness skills needed to cater to international visitors are seen as being essential in order to ensure that Australian businesses provide the world-class experiences these visitors are seeking. While it is noted that qualifications for Translating and Interpreting sit outside of the *SIT Tourism, Travel and Hospitality Training Package*, upskilling employees with basic language skills to provide service to international visitors is seen to be of critical importance.

## Technology

The digital revolution is well and truly here, and technological disruptions have been changing the way customers and businesses interact and operate across all industries in Australia. Tourism, travel and hospitality industries are no exception, and, in fact, are some of the industries that have been comparatively impacted the most by technological developments.

The adoption of technology by industries has been driven by consumers<sup>68</sup> who have been proactive in embracing devices and tools to enhance daily living, including the acquisition of holiday experiences. For example, there has

been a 63% increase in the number of mobile handset subscribers in Australia over the past five years, reaching a new high of 26.3 million.<sup>69</sup> Access to mobile devices (and consequently internet subscriptions) has pushed traders to embrace online shopping and online engagement activities. While online travel and reservation bookings are a significant element of the industries (and are discussed separately below), other technologies and digital initiatives which have been shaping industry activities include:<sup>70</sup>

- **M-commerce**, for mobile commerce, a subset of e-commerce which includes buying and selling via smartphones and tablets, and also includes mobile content purchases such as those made via 'apps'.
- **Mobile apps**, to aid decision-making regarding transport routes, destinations, local activities and dining options as well as ordering.
- **Tabletop** devices to order and pay when dining.
- **Voice-recognition technology** to capture orders.

The adoption of technology has meant workforce skills requirements have changed and will continue to change. Automation and online engagement facilitated by technology will mean the skills requirements of all role types across the industries need to evolve to reflect the new working environments. This can include waitstaff adapting to new devices to capture orders and payments, and managers accessing more in-depth customer data and learning how to read that data from online and social media platforms in order to understand customer behaviour and better target products and services.

## The 'Knowledgeable' Customer and Heightened Expectations

The customer landscape has been evolving in line with wider industry trends regarding technology, innovation and globalisation, and, as a result, the consumer of travel, tourism and hospitality services has never before been more educated or better informed about services, activities, experiences and brands. Individuals are accessing a wealth of news, data and reviews to support or discourage the purchase of a product or service, and this access to information is increasing knowledge and, consequently, heightening customer expectations across

all touch-points of the customer journey (i.e. pre- and post-purchase). For these sectors, this is particularly important given that, in many cases, customers are purchasing an 'experience,' and customer loyalty to brands and products is diminishing with the online and competitive nature of the market. Customer expectations now involve:<sup>71</sup>

- **Digital experiences** – Online platforms which provide responsive and personalised customer service through customised communication and delivery options.
- **Physical and digital integration** – Omnichannel consolidation which provides a seamless experience across all channels.
- **Mobile experiences** – Access to mobile apps which provide innovative and fun ways of interacting with products and brands, including the ability to tailor information and marketing to preferences.
- **Personalisation** – Communication and offers regarding holidays, dining, adventures and accommodation, as well as product variability and payment options, customised to resonate with individual customers.

Obtaining an in-depth understanding of customers across the spectrum of sectors, including their needs across the preferences listed above, is now an essential function for businesses to grasp in order to ensure that their expectations are exceeded. The adoption of technology is an important factor for meeting these customer expectations and, as a result, workforce skills requirements have been changing. Online engagement facilitated by technology means that methods of reaching and effectively communicating with customers have evolved, and so too have the skills needs of the sector. Skills regarding data analytics, statistics, data processing, online metrics, customer behaviour analytics and cybersecurity are growing in importance across the industry.

## Social Media

Social media has undoubtedly become a popular online platform and, for many individuals, one that is accessed on a daily basis. The latest statistics show that in Australia there are 17 million active Facebook users.<sup>72</sup> This is equivalent to 70% of the population. Other platforms

with which consumers are engaging regularly include YouTube, WordPress.com and Instagram. While the general public is actively using social media, the extent to which businesses are embracing social media and running digital campaigns is not as high. Across the arts and recreation services industry and accommodation and food services industry, 69.9% and 56.0% of businesses respectively have a social media presence. These figures are on average higher than those of other industries, although they still remain significantly lower than the rates of use by consumers.<sup>73</sup>

Social media has significantly transformed the tourism, travel and hospitality sectors, with key impacts including:<sup>74</sup>

- **Online reviews** - With 85% of consumers trusting online reviews as much as a personal recommendation,<sup>74</sup> it is evident that maximising online presence and reputation is now an essential tool for business survival.
- **Sharing via social media** - Platforms such as Twitter, Facebook and Instagram provide individuals with channels to instantly share quotations, photos and videos of experiences with businesses and services. Nearly all (97%) Millennials share photos and videos of their travels online and some hotels and resorts have therefore been working to leverage their customers' social activity by setting up social media competitions and campaigns (i.e. #EventName).

Digitalisation and the continuing increase in consumer demand for online and social media interactions mean that online and social media engagement is (and will continue to be) an essential area in which businesses will need to be involved. Workforce skills training is an important component of this trend which can assist in supporting businesses and the wider economy to engage effectively, and such training can involve a combination of technical skills (i.e. setting up a Facebook or Twitter account and using it on behalf of an organisation) and non-technical skills such as the ethical use of social media, content creation and risk management, which involves having the skills to communicate and respond to negative reviews.

# Employment and Skills Outlook

## Labour Force Data

The principal data collection 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 published by the Department of Jobs and Small Business and Tourism Research Australia. The workforce statistics and projections presented in this section of the Forecast are primarily based on Census collections, and are reported according to prescribed Australian and New Zealand Standard Industrial Classifications (ANZSIC) and Australian and New Zealand Standard Classification of Occupations classifications (ANZSCO).

Employment levels and roles covered by the *SIT Tourism, Travel and Hospitality Training Package* are predominantly captured across the ANZSIC Division H **Accommodation and Food Services** category. It covers:

- Accommodation
- Cafés, restaurants and takeaway food services
- Pubs, taverns and bars, and
- Clubs (hospitality).

The widespread nature of services and activities conducted throughout the broader tourism and travel sector, however, means that other relevant employment data is captured across additional ANZSIC categories:

- ANZSIC Division N **Administrative and Support Services** (which covers booking services, travel agency operations, tour arrangement services, event management services and tourist information centre operations)
- ANZSIC Division R **Arts and Recreation Services** (which covers museum operations, amusement park and centre operations, and gambling activities).

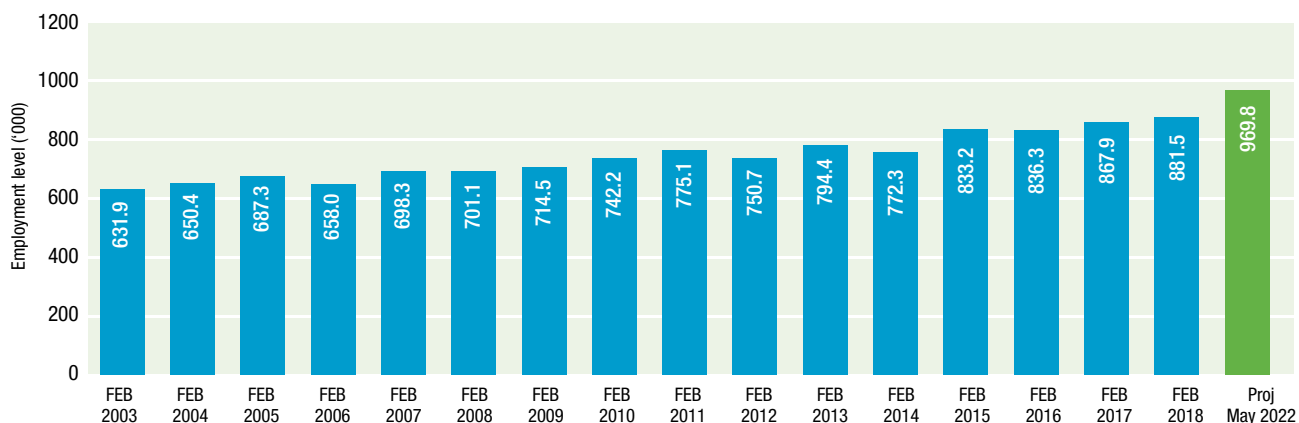
Overall, the sectors host a multitude of job functions and, consequently, job titles which may extend beyond the categories listed in ANZSIC and ANZSCO. The statistics outlined in this section, therefore, are provided as an indicative overview of workforce levels and trends most relevant to this training package.

## Industry Projections

The latest employment data shows that the **accommodation and food services** sector employs over 881,000 workers across the country and, over the past five years, has experienced employment growth of 11%. The sector predominantly consists of services related to food and beverage services including cafés, restaurants and takeaway food services (representing 754,600 jobs across Australia).<sup>76</sup>

Projections estimate that employment in the industry will continue to increase steadily between now and 2022 (by 11.2%) to reach 969,800 jobs (see Figure 5).<sup>77</sup> It is one of the top five industries projected to experience the strongest growth in employment levels over the next five years, following the health care and social assistance sector (16.1% projected growth rate), professional, scientific and technical services sector (12.5%) and education and training (12.0%).

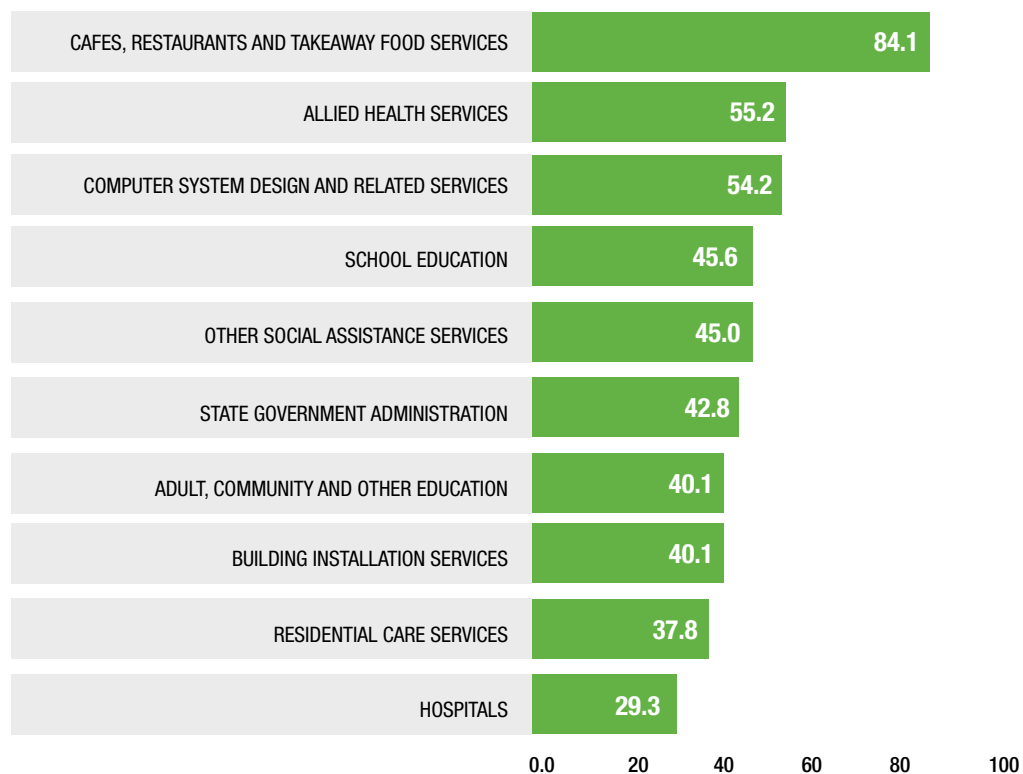
**Figure 4** Employment levels ('000) in Accommodation and Food Services - 2003 to 2022



Source: Australian Government Department of Jobs and Small Business Trend Data and Projections – five years to May 2022

Examining employment projections across sub-sectors of all industries shows that the cafés, restaurants and takeaway food services sub-sector of accommodation and food services is projected to be the highest employment growth sector of the economy. Forecasts show the number of jobs is expected to be well above the second and third employment growth sectors of allied health services, and computer system design (see Figure 6).

**Figure 6** Employment Projections ('000s) of Top 10 employment growth sectors in Australia - May 2022

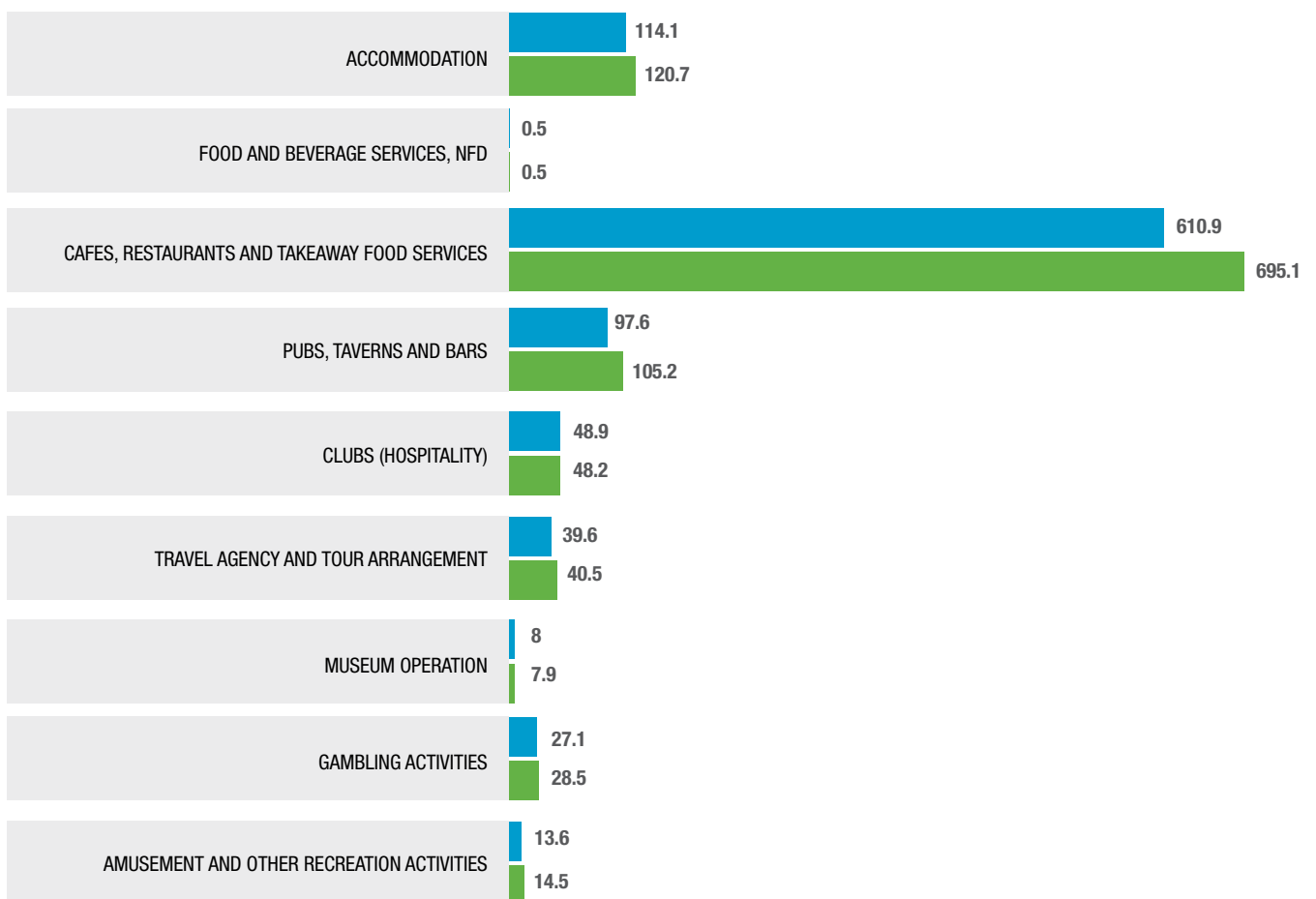


Source: Australian Government Department of Jobs and Small Business Trend Data and Projections – five years to May 2022



Employment growth within the overall accommodation and food services sector will be driven by growth in food and beverage services, representing an increase of 84,100 jobs in **cafés, restaurants and takeaway food services** (to reach 695,100 in 2022), and 7,600 jobs in **pubs, taverns and bars**<sup>78</sup> (to reach 105,200 in 2022)(see Figure 7). All other relevant sectors charted, except clubs (hospitality) and museum operations, are expected to experience positive growth in employment levels.

**Figure 7** Current and projected employment levels ('000s) by various sectors in Tourism, Travel and Hospitality (ANZSIC) - May 2017 to May 2022



Note: The code "nfd" stands for "not further defined".

Source: Australian Government Department of Jobs and Small Business Trend Data and Projections – five years to May 2022

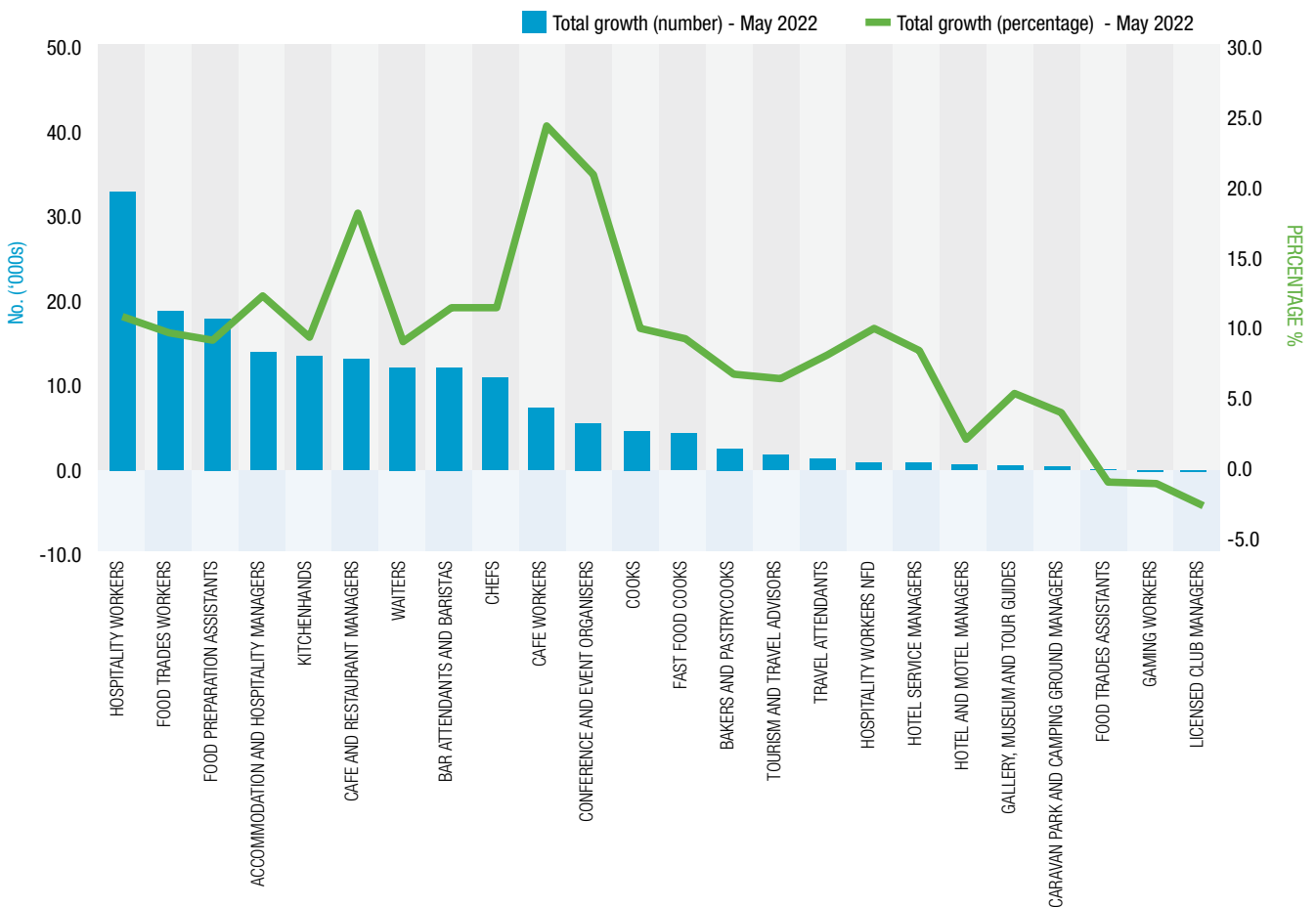
## Occupation Projections

The tourism, travel and hospitality sectors host an array of varied occupations, and employment forecasts show that the largest increases (see Figure 8, below) are expected for:

- **hospitality workers** (an increase of 32,800 jobs representing 11.5% growth)
- **food trade workers** (an increase of 18,600 jobs, representing 10.5% growth)
- **accommodation and hospitality managers** (13,800 jobs, representing 12.8% growth)
- **café and restaurant managers** (13,100 jobs, representing 18.5% growth).

**Café workers** and **conference and event organisers** are expected to register the highest growth rates relative to their current workforce size, with forecast growth of 24.4% and 21.0% respectively.

Figure 8 Employment Projections ('000s and %s) of selected occupations in Tourism, Travel and Hospitality - May 2022



Source: Australian Department of Jobs and Small Business, 2017 Occupational Projections – five years to November 2022



NSW; South Coast; Accommodation;  
Tourism Australia  
Image courtesy of Tourism Australia

An overview of a selection of relevant occupations supported by the Tourism, Travel and Hospitality Training Package is provided below. The occupations have been categorised according to levels of seniority in the industry. Within these occupations, most employees are qualified at an Associate Diploma or Diploma level. Most of these occupations require at a minimum a Certificate III education attainment level. The growth in the Hospitality-related (food preparation) workforce is forecast to be strong over the next five years. Travel and tourism occupations within the ambit of this IRC are expected to have moderate growth over the next five years. With these occupations, Certificate III is the most common level of education. Growth in employment is expected to be very strong and job openings will be triggered by a combination of workers leaving and new jobs being created.

### MANAGEMENT roles in Tourism, Travel and Hospitality



#### Top Skills Areas

- Service Orientation
- Critical Thinking
- Management of Personnel Resources
- Speaking
- Coordination
- Monitoring
- Active Listening

#### The occupations within this scope include:

- Café or Restaurant Managers
- Hotel and Motel Managers
- Hotel Service Managers
- Other Accommodation and Hospitality Managers
- Caravan Park and Camping Ground Managers, and
- Licensed Club Managers.

Source: Australian Department of Jobs and Small Business, Job Outlook, ANZSCO ID: 1411, 1413, 4314, 1419, 1412, 1414

### FOOD PREPARATION roles



#### Top Skills Areas

- Coordination
- Monitoring
- Critical Thinking
- Active Learning
- Speaking
- Social Perceptiveness

#### The occupations within this scope include:

- Chefs
- Cooks
- Bakers and Pastry Cooks, and
- Bar Attendants and Baristas.

Source: Australian Department of Jobs and Small Business, Job Outlook, ANZSCO ID: 3513, 3514, 3511, 4311

## TRAVEL AND TOURISM roles



### Top Skills Areas

- Speaking
- Service Orientation
- Coordination
- Active Listening
- Social Perceptiveness

### The occupations within this scope include:

- Tourism and Travel Advisors
- Gallery, Museum and Tour Guides, and
- Travel Attendants.

Source: Australian Department of Jobs and Small Business, Job Outlook, ANZSCO ID: 4516, 4514, 4517

## CONFERENCE AND EVENT roles



### Top Skills Areas

- Customer and Personal Services
- English Language
- Communication and Media
- Clerical
- Administration and Management

### The occupations within this scope include:

- Conference and Event Organisers.

Source: Australian Department of Jobs and Small Business, Job Outlook, ANZSCO ID: 1493

## OTHER roles



### Top Skills Areas

- Active Listening
- Service Orientation
- Coordination
- Speaking
- Social Perceptiveness

### The remaining occupations involve hospitality-related workers such as:

- Waiters
- Gaming Workers, and
- Housekeepers.

Growth over the next five years is expected to be stable. The level of education required for these occupations is generally a Certificate II at a minimum.

Source: Australian Department of Jobs and Small Business, Job Outlook, ANZSCO ID: 4315, 4313, 8114

## Future Skills Needs

### Science, Technology, Engineering and Mathematics (STEM) Skills

With the constant evolution of technology through automation, artificial intelligence (AI) and robots, the skills needed by the workforce in the coming years will be vastly different to those required today. It is imperative that this be factored in to training packages that are being developed, adapted and updated. Technological disruption, as it has done in the past, will replace some industries, companies and workers, especially those that lack the flexibility to adapt.

Australians are generally welcoming of technology, and most believe that innovation and new technology development is vital for Australia's future prosperity.<sup>79</sup> There is some speculation that, as a result of technological developments, approximately 40% of the workforce will be replaced by computers in the next 10 to 15 years.<sup>80</sup> This does not take into account the fact that technology also creates new jobs and often replaces inefficient processes. Also, rather than replacing a worker's role, the rise of technology and automation won't necessarily change what jobs workers do; instead, it will change the way in which workers do their jobs. Technological advancement has the ability to not merely impact low-skilled workers by replacing menial tasks with automation, but also has the potential to affect highly skilled workers through AI supplementation, or even by replacing cognitive tasks.<sup>81</sup>

Workers will need the ability to use digital technology in their jobs to access and use information and digital content; communicate and collaborate through digital technologies; manage their digital identity; develop digital content; and use and protect their digital devices, personal and organisational data, and privacy.<sup>82</sup> This is especially critical for workers within the tourism, travel and hospitality sectors, as more and more data is collected about visitors and tourists to streamline service provision. As booking systems become more integrated and integral to workplace performance monitoring, future workers will need to be constantly learning and receiving training in how best to maximise technology within a business setting.

### Soft Skills

While STEM skills are critical for the needs of the future, other interpersonal or 'soft' skills are just as important. Soft skills include things like communication, teamwork, problem solving, emotional judgement, professional ethics and global citizenship. Deloitte Access Economics forecasts that two-thirds of jobs will be soft skill-intensive by 2030.<sup>83</sup>

Businesses are aware of the importance of soft skills. A survey conducted in 2015 of over 450 business managers and executives in Western Sydney cited teamwork, communication skills and time management as vital skills for applicants to possess (TAFE NSW 2015). Megatrends like technology advancement and globalisation will contribute to more demand for people with soft skills as the geographical barriers fall due to technology, making it easier to connect people across countries.<sup>84</sup>

The need for soft skills is even more essential in leadership positions. A survey conducted by Deloitte found that soft skills were more important for determining the success of a leader than technical knowledge.<sup>85</sup> For decision-makers the ability to effectively communicate, problem solve and think critically is important for success. Credentials for soft skills are beginning to emerge. The benefits to businesses are twofold. Firstly, recruitment processes can be made more efficient as credentials allow recruiters to pre-screen potential candidates for the required soft skills. The second benefit is that more targeted recruitment for soft-skilled candidates allows businesses to make savings in training and developing their own workforce later on.<sup>86</sup> These skills going forward will be vital to workers within the remit of this IRC as employers struggle to recruit adequately skilled workers.

Current training package products within the SIT Training Package have content regarding soft skills so it is important to ensure that businesses within the industry are aware of these options and the ability to tailor training to meet their specific job role requirements.

### Leadership

Leadership in the workplace is another important emerging trend in future skill needs. As Australia potentially enters a period of slow economic growth, it



Mocean Cafe, Streaky Bay, SA  
South Australian Tourism Commission  
Image courtesy of Tourism Australia

will be essential that Australian organisational leaders are ready to meet new challenges. Formal training provides a foundation for the diverse skills associated with leadership – from technical skills to solving problems and managing change. Investing in leadership development is positively associated with leadership capabilities and self-efficacy, which in turn significantly improves workplace performance and innovation. Yet the findings reveal that many workplaces do not invest in leadership development at all, or invest very little. Frontline leadership matters most for employees, shaping the experience of work and creating a positive climate for innovation and performance.<sup>87</sup> Within the sectors of focus, it is essential that staff have the skills to ensure they can cope in fast-paced and high-pressured work environments, not only in terms of working with customers, but also in the management of workforce teams.

# Key Generic Skills – Ranked in Order of Importance

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 2018 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

1	<b>CUSTOMER SERVICE / MARKETING</b>	Ability to interact with other human beings, whether helping them find, choose or buy something. Ability to supply customers' wants and needs. Ability to manage online sales and marketing. Ability to understand and manage digital products.
2	<b>COMMUNICATION / COLLABORATION / SOCIAL INTELLIGENCE</b>	Ability to understand/apply principles of creating more value for customers and collaborative skills. Ability to critically assess and develop content with new media forms and persuasive communications. Ability to connect in a deep and direct way.
3	<b>MANAGERIAL / LEADERSHIP</b>	Ability to effectively communicate with all functional areas in the organisation. Ability to represent and develop tasks and processes for desired outcomes. Ability to oversee processes, guide initiatives and steer employees toward achievement of goals.
4	<b>TECHNOLOGY AND APPLICATION</b>	Ability to create/use technical means, understand their interrelation with life, society, and the environment. Ability to understand/apply scientific or industrial processes, inventions, methods. Ability to deal with mechanisation/automation/computerisation.
5	<b>LEARNING AGILITY / INFORMATION LITERACY / INTELLECTUAL AUTONOMY / SELF-MANAGEMENT</b>	Ability to identify a need for information. Ability to identify, locate, evaluate, and effectively use and cite the information. Ability to develop a working knowledge of new systems. Ability to work without direct leadership and independently.
6	<b>LANGUAGE, LITERACY &amp; NUMERACY (LLN)</b>	Foundation skills of literacy and numeracy.
7	<b>DESIGN MINDSET/ THINKING CRITICALLY / SYSTEM THINKING / PROBLEM SOLVING</b>	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.
8	<b>ENVIRONMENTAL / SUSTAINABILITY</b>	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	<b>ENTREPRENEURIAL</b>	Ability to take any idea and turn that concept into reality/make it a viable product and/or service. Ability to focus on the next step/move closer to the ultimate goal. Ability to sell ideas, products or services to customers, investors or employees, etc.
10	<b>FINANCIAL</b>	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.
11	<b>DATA ANALYSIS</b>	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.
12	<b>STEM (Science, Technology, Engineering and Maths)</b>	Sciences, mathematics and scientific literacy





Mossman Gorge, Daintree National Park, QLD  
Tourism Port Douglas and Daintree  
Image courtesy of Tourism Australia

## Key Drivers for Change and Proposed Responses

### Drivers for Change and Skill Needs

Tourism, travel and hospitality are key sectors driving economic growth in Australia. The sectors represent a range of business types and services, which in many cases are connected with each other. For example, tourism can directly encompass travel and accommodation services, and indirectly contribute to demand for retail and food and beverage services. Events and exhibitions also have a wide impact on various services, including marketing, catering services and audio-visual presentations, and attendees in particular can trigger demand for transport and accommodation.

Overall, **employment projections are strong across all areas of the industry**, particularly for café, restaurant and accommodation services with regard to hospitality workers, food trade workers and accommodation and restaurant managers. Industry, however, is currently challenged by a number of recruitment issues including skills shortages and low attraction and retention rates among suitably skilled staff. Training for the domestic workforce, and the role of this training package, is therefore of foremost consideration in terms of addressing the current skills issues experienced by the sub-sectors, and supporting the broader industry in reaching its forecast economic potential.

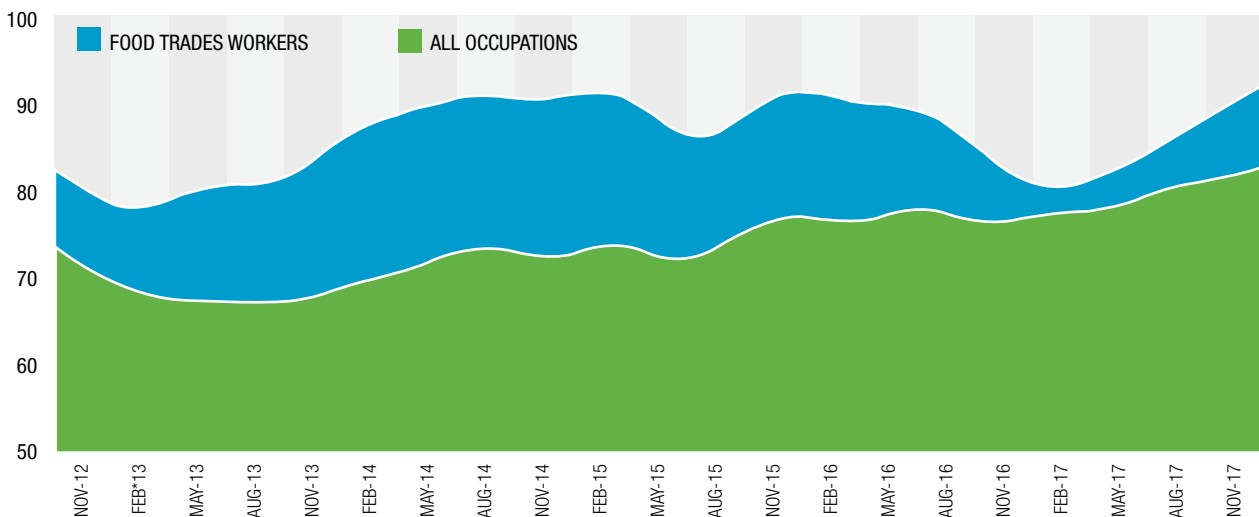
A widespread **multichannel consultation** involving the following stakeholders and activities has been conducted to identify and substantiate the key skills gaps and training needs of the sector, and to determine whether or not there is a need to update the respective training package products:

- All Tourism, Travel and Hospitality Industry Reference Committee (IRC) members collectively representing the following key bodies:
  - Austrade (The Australian Trade and Investment Commission)
  - Australian Culinary Federation National Office
  - Australian Federation of Travel Agents
  - Australian Hotels Association
  - Australian Municipal, Administrative, Clerical and Services Union
  - Caravan Industry Association of Australia
  - Clubs Australia
  - Compass Group
  - Defence Catering
  - Exhibition and Event Association Australasia
  - Hospitality Group Training
  - Qantas Airways
  - Restaurant and Catering Industry Association of Australia
  - The Star Entertainment Group
  - Tourism Central Australia
  - Tourism, Hospitality and Catering Institute of Australia
- Networks of the Tourism, Travel and Hospitality IRC members
- A national online survey was distributed via the SkillsIQ database during November and December 2017 that sought to identify top skills needs and priority industry issues
- Public consultation on the draft Industry Skills Forecast was publicised to over 17,000 stakeholders registered in SkillsIQ's database network
- The Industry Skills Forecast, including the Proposed Schedule of Work, was promoted to stakeholders and made available via SkillsIQ's website.

A **number of workforce issues and gaps in skills training** have thereby been identified in relation to hospitality. These are as follows:

- **Workforce shortages in food trade occupations** – Demand for skilled food trade workers such as chefs, bakers and pastry cooks (pâtissiers) is strong. However, applicant numbers are low and nearly all areas across Australia, particularly regional areas, are experiencing workforce shortages. The number of vacancies for food trade workers reached a peak in November 2017 (see Figure 9), and this was driven entirely by the demand for chefs. **Low attraction and retention** of staff is a significant issue for these roles and, indeed, for the wider hospitality sector. Understanding the reasons for low attraction and high staff turnover, and the role the training package can have in supporting employers, is key to addressing these workforce supply and development issues. Employment projections for the next five years for food trade occupations is strong. It is therefore particularly timely to focus on ensuring sufficient workers with the right skills are in place to meet this demand.

**Figure 9** Internet vacancies, food trade workers and all occupations, Australia, November 2012 to November 2017 (indexed)



Source: Department of Jobs and Small Business, Internet Vacancy Index, trend (January 2006 = 100). Available at <https://docs.jobs.gov.au/documents/food-trades-australia>

- Skills training does not reflect current industry practices** – Employers have voiced to various associations, including the Australian Culinary Federation (ACF), a peak body representing chefs, cooks, apprentices and culinary students, that workers entering the industry after completing their qualification (or apprenticeship) lack contemporary skills in food preparation. This includes an understanding of the latest technologies and techniques applicable to the preparation and cooking of food, as well as those required for running a business. Modernising the qualifications in order to meet current industry requirements will encourage the retention of workers who are looking to acquire contemporary skills. Training also needs to be improved in **culinary terminology**, and there is industry support to urgently review and implement units of competency that address this. Ensuring skills training reflects industry practices will also ensure graduates feel confident in their ability to contribute to the workplace, and the problems of staff leaving workplaces because they fail to meet employers' expectations will therefore be mitigated.
- Working across the cookery sector** – The transition of workers across sectors is common, and career progression no longer takes the traditional linear pathway. The commercial cookery sector is no different, and its workforce can now experience multiple hospitality environments, ranging from fine dining restaurants and clubs to catering to mine sites and other mass operations. The training package needs to ensure prospective workers have the requisite skills to be employed in all these varied workplaces and enable career progression across such disparate work environments.
- Lack of business and commercial skills in graduates** – Whilst graduates may be equipped with the right technical skills to conduct their trade, employers have indicated that, after finishing a qualification (or an apprenticeship), workers may be required to run a small operation within a business environment, which may include rostering junior staff, ordering stock or other business functions. Skilling cookery graduates to the level that they can run a small operation in its entirety and/or run a section of a larger operation is important, and needs to be reflected in the training package.



Galleries and Museums, Melbourne, VIC  
 Visit Victoria  
 Image courtesy of Tourism Australia

- Issues in demonstrating competency** – There is a need to review the assessment criteria and requirements so that learners adequately demonstrate competency prior to the completion of their qualifications. Learners must be able to prove through the assessment process that they can apply key skills and complete set tasks for their roles. This is important in terms of helping address the feedback received from industry regarding the lack of skilled workers entering the industry after completing apprenticeships. Improving the assessment process is essential to ensuring that graduates can actually carry out that which their qualifications state should be within their ability.
- Legislative changes affecting access to overseas workers** – The tourism, travel and hospitality sector’s structure is borderless, and the nature of its operations make it an internationally-operative industry. Changes to visa eligibility conditions reducing access to overseas workers, however, mean that employers need to use alternative channels for filling vacancies, including training pools of local employees with ‘job-ready’ skills.

### Proposed Response

To address these workforce skills issues, it is proposed that an update of the following qualifications and skill sets in the training package be conducted:

#### 10 Qualifications:

Code	Qualification Title
SIT20416	Certificate II in Kitchen Operations
SIT20516	Certificate II in Asian Cookery
SIT30816	Certificate III in Commercial Cookery
SIT30916	Certificate III in Catering Operations
SIT31016	Certificate III in Patisserie
SIT31116	Certificate III in Asian Cookery
SIT40516	Certificate IV in Commercial Cookery
SIT40616	Certificate IV in Catering Operations
SIT40716	Certificate IV in Patisserie
SIT40816	Certificate IV in Asian Cookery

#### 5 Skill Sets:

Code	Qualification Title
SITSS00054	Kitchen Management
SITSS00057	Supervision of Cookery Apprentices
SITSS00050	Food Handling*
SITSS00051	Food Safety Supervision*
SITSS00052	Hospitality Compliance*

Note: \*A Food Safety Technical Advisory Committee (TAC) met on 9 April 2018 to discuss the development of a Case for Change in relation to the review of these three skill sets. It was agreed that its review should occur simultaneously with the review proposed for the wider training package products since there are clear associations in both content and skills covered.

A number of key risks have been identified and are tabled below in the event that the update of the training package products (in line with the articulated needs of industry) is **not** actioned.

STAKEHOLDER	RISK OF NO CHANGE
<b>Employers</b> (i.e. businesses, including restaurants and cafés)	<ul style="list-style-type: none"> <li>• <b>Competitiveness in the marketplace will be diminished</b> if businesses are not supported by suitably skilled staff that can enhance and support innovation in food services to meet customer expectations.</li> <li>• <b>Cost implications</b> will include time allocated by head chefs and/or business owners to conduct in-house training with staff to get them fully skilled in contemporary techniques and processes. This will reduce time for businesses to attend to customers and plan growth strategies.</li> <li>• <b>Staff turnover</b> may be triggered by frustrations that staff members are unable to meet employer expectations in conducting certain cooking tasks and/or overseeing kitchen operations, and progressing into more senior roles.</li> <li>• <b>Employers may lack confidence</b> in their staff's ability to carry out key culinary functions which may therefore jeopardise their businesses' reputations regarding the level and quality of food service offerings.</li> </ul>
<b>Employees</b>	<ul style="list-style-type: none"> <li>• <b>Performance may fall further</b> below employer (and customer) expectations, which will negatively impact the individuals' and organisations' reputations.</li> <li>• <b>Staff will lack the core skills</b> in culinary, food safety and overall kitchen operations, thereby impeding their ability to progress to higher-level positions.</li> <li>• <b>Staff will receive poor or inadequate training</b> (i.e. ad hoc on-the-job training as skill requirements arise) that may not cover the skill need to the level of proficiency, and within the timelines, required.</li> </ul>
<b>Students</b>	<ul style="list-style-type: none"> <li>• <b>Students will graduate with insufficient skills</b> to meet employers' expectations in the provision of innovative food offerings, thereby reducing their employability.</li> </ul>
<b>Training Providers</b>	<ul style="list-style-type: none"> <li>• <b>Training offered will not match industry needs</b> and the quality and reputation of RTOs' course delivery will therefore be compromised.</li> </ul>

The proposed response aims to ensure the hospitality sector (and indirectly, all other sectors associated with it, including tourism, travel and accommodation) is supported by a high quality trained and skilled workforce.

# Proposed Schedule of Work

## 2018–19

YEAR	PROJECT TITLE	DESCRIPTION
2018–19	Cookery, Catering and Patisserie	The IRC proposes to update 10 qualifications, 5 skill sets and 68 units of competency relating to commercial cookery, Asian cookery, patisserie, and catering operations to meet current and emerging industry needs. See <b>Appendix A</b> for the full list.

## 2019–20

YEAR	PROJECT TITLE	DESCRIPTION
2019–20	Tourism and Hospitality	The IRC proposes to update 20 qualifications, 21 skill sets and 156 units of competency relating to tourism, guiding, accommodation, holiday parks and resorts, and hospitality to meet current and emerging industry needs.

### 2018-19 Project Details

PROJECT TITLE	COOKERY, CATERING AND PÂTISSERIE
<b>Description:</b>	The IRC proposes to update 10 qualifications, 5 skill sets and 68 units of competency relating to commercial cookery, Asian cookery, patisserie, and catering operations to meet current and emerging industry needs. A full list of the training package products to be updated in this project may be found at <b>Appendix A</b> .
<b>Rationale:</b>	As outlined in the <b>Key Drivers for Change</b> section, the update of the nominated training package products will assist in addressing workforce labour shortages by providing businesses with access to skilled workers, ensuring that training reflects current industry practice, cross-skilling workers for a range of sectors, increasing the business acumen and skills of workers in these sectors, and ensuring that assessment practices are robust enough to produce skilled graduates.
<b>Ministers' Priorities Addressed:</b>	<p>The update of training package products proposed in this Industry Skills Forecast will consider opportunities to support the Council of Australian Governments (COAG) Industry and Skills Council and will use consultation activities and stakeholder engagement to identify:</p> <ul style="list-style-type: none"> <li>• opportunities to identify and remove obsolete training package products from the system.</li> <li>• industry expectations for training delivery and assessment, to be documented within the Companion Volume Implementation Guide.</li> <li>• opportunities to enhance the portability of skills from one related occupation to another. This is particularly important given the crossover of sectors within the tourism, travel and hospitality industry.</li> <li>• opportunities to remove unnecessary duplication within the system and create training package products that may have application to multiple industry sectors. The existing qualifications cater to a range of job roles in the cookery, catering and patisserie sectors and contain cross-sector units that are utilised in more than one qualification and across job roles.</li> <li>• opportunities for the development of skill sets.</li> </ul>

PROJECT TITLE	COOKERY, CATERING AND PATISSERIE
<b>Consultation Plan:</b>	<p>The IRC will guide the consultation process ensuring that key industry stakeholders are consulted at all stages of the project and provided with the opportunity to have input.</p> <p>National industry consultation workshops will be conducted on a face-to-face basis to collect broader industry views and feedback, along with webinars to facilitate those stakeholders who are unable to attend a face-to-face workshop. ITABs will be engaged in those states and territories in which they exist to ensure a national perspective is gained.</p> <p>All proposed training package products will be uploaded to the SkillsIQ Online Feedback Forum during consultation periods to enable stakeholders to provide specific feedback on the content of qualifications, skill sets and units of competency.</p> <p>This feedback will be provided to the IRC (or any Technical Advisory Committee the IRC may choose to appoint) to inform its decision-making process in developing the final training package products to be submitted to the AISC for endorsement.</p>
<b>Timing - Estimated Duration of Project and Key Dates:</b>	<p>Project to commence upon the issuance of an Activity Order in July 2018.</p> <p>Consultation on Draft One and Draft Two of the updated training package products to occur through to the end of November 2018, with validation, quality assurance, STAs' (State Training Authorities') review occurring in February–March 2019.</p> <p>The final submission of the Case for Endorsement is expected in May 2019.</p> <p>A detailed project plan outlining key dates will be developed and aligned to the Activity Order date once known.</p> <p><i>*Please note that any delay in commencing the project would impact the overall timing, potentially causing significant delay, as consultation cannot take place during the industry's peak business period of December–January.</i></p>
<b>Training Package to be Revised:</b>	<p>SIT Tourism, Travel and Hospitality Training Package</p>
<b>Skill Set/s to be Developed/Updated:</b>	<p>Five skills sets to be updated:</p> <ul style="list-style-type: none"> <li>• Kitchen Management</li> <li>• Supervision of Cookery Apprentices</li> <li>• Food Handling</li> <li>• Food Safety Supervision</li> <li>• Hospitality Compliance.</li> </ul>
<b>Qualification/s to be Developed/Updated:</b>	<p>10 qualifications.</p> <p>A full list of the training package products to be updated in this project may be found at <b>Appendix A</b>.</p>
<b>Unit/s of Competency to be Developed/Updated:</b>	<p>68 units of competency.</p> <p>A full list of the training package products to be updated in this project may be found at <b>Appendix A</b>.</p>

# Appendix A

## Qualifications, Skill Sets and Units of Competency to be Updated in the Cookery, Catering and Patisserie Project.

### 10 Qualifications:

Code	Qualification Title
SIT20416	Certificate II in Kitchen Operations
SIT20516	Certificate II in Asian Cookery
SIT30816	Certificate III in Commercial Cookery
SIT30916	Certificate III in Catering Operations
SIT31016	Certificate III in Patisserie
SIT31116	Certificate III in Asian Cookery
SIT40516	Certificate IV in Commercial Cookery
SIT40616	Certificate IV in Catering Operations
SIT40716	Certificate IV in Patisserie
SIT40816	Certificate IV in Asian Cookery

### 5 Skill Sets:

Code	Qualification Title
SITSS00054	Kitchen Management
SITSS00057	Supervision of Cookery Apprentices
SITSS00050	Food Handling*
SITSS00051	Food Safety Supervision*
SITSS00052	Hospitality Compliance*

Note: \*A Food Safety Technical Advisory Committee (TAC) met on 9 April 2018 to discuss the development of a Case for Change in relation to the review of these three skill sets. It was agreed that its review should occur simultaneously with the review proposed for the wider training package products since there are clear associations in both content and skills covered.

### 68 Units of Competency

Code	Qualification Title
SITHASC001	Prepare dishes using basic methods of Asian cookery
SITHASC002	Prepare Asian appetisers and snacks
SITHASC003	Prepare Asian stocks and soups
SITHASC004	Prepare Asian sauces, dips and accompaniments
SITHASC005	Prepare Asian salads
SITHASC006	Prepare Asian rice and noodles
SITHASC007	Prepare curry pastes and powders
SITHASC008	Prepare Asian cooked dishes
SITHASC009	Prepare Asian desserts
SITHASC010	Prepare Japanese cooked dishes
SITHASC011	Prepare sashimi
SITHASC012	Prepare sushi
SITHASC013	Produce Japanese desserts
SITHASC014	Prepare dim sum
SITHASC015	Prepare Chinese roast meat and poultry dishes
SITHASC016	Prepare tandoori dishes
SITHASC017	Prepare Indian breads
SITHASC018	Prepare Indian sweetmeats
SITHASC019	Prepare Indian pickles and chutneys





Code	Qualification Title
SITHCCC001	Use food preparation equipment
SITHCCC002	Prepare and present simple dishes
SITHCCC003	Prepare and present sandwiches
SITHCCC004	Package prepared foodstuffs
SITHCCC005	Prepare dishes using basic methods of cookery
SITHCCC006	Prepare appetisers and salads
SITHCCC007	Prepare stocks, sauces and soups
SITHCCC008	Prepare vegetable, fruit, egg and farinaceous dishes
SITHCCC009	Produce cook-chill and cook-freeze foods
SITHCCC010	Re-thermalise chilled and frozen foods
SITHCCC011	Use cookery skills effectively
SITHCCC012	Prepare poultry dishes
SITHCCC013	Prepare seafood dishes
SITHCCC014	Prepare meat dishes
SITHCCC015	Produce and serve food for buffets
SITHCCC016	Produce pates and terrines
SITHCCC017	Handle and serve cheese
SITHCCC018	Prepare food to meet special dietary requirements
SITHCCC019	Produce cakes, pastries and breads
SITHCCC020	Work effectively as a cook
SITHCCC021	Prepare specialised food items
SITHCCC022	Prepare portion-controlled meat cuts
SITHKOP001	Clean kitchen premises and equipment
SITHKOP002	Plan and cost basic menus
SITHKOP003	Plan and display buffets
SITHKOP004	Develop menus for special dietary requirements
SITHKOP005	Coordinate cooking operations
SITHKOP006	Plan catering for events or functions
SITHKOP007	Design and cost menus
SITHKOP008	Select catering systems
SITHPAT001	Produce cakes
SITHPAT002	Produce gateaux, torten and cakes
SITHPAT003	Produce pastries
SITHPAT004	Produce yeast-based bakery products
SITHPAT005	Produce petits fours
SITHPAT006	Produce desserts
SITHPAT007	Prepare and model marzipan
SITHPAT008	Produce chocolate confectionery
SITHPAT009	Model sugar-based decorations
SITHPAT010	Design and produce sweet buffet showpieces
SITXFSA001	Use hygienic practices for food safety
SITXFSA002	Participate in safe food handling practices
SITXFSA003	Transport and store food
SITXFSA004	Develop and implement a food safety program
SITXINV001	Receive and store stock
SITXINV002	Maintain the quality of perishable items
SITXINV003	Purchase goods
SITXINV004	Control stock
SITXINV005	Establish stock purchasing and control systems

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