

2019



TOURISM, TRAVEL AND HOSPITALITY

INDUSTRY REFERENCE COMMITTEE
INDUSTRY SKILLS FORECAST



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Executive Summary

The Tourism, Travel and Hospitality industry, including Events & Exhibitions and Accommodation (such as hotels, holidays parks and resorts) is one of the key contributors and drivers of economic growth in Australia. Together, the contribution of these sectors to Australia's Gross Domestic Product (GDP) is equivalent to over \$100 billion, including \$55.3 billion from tourism and \$24.9 billion from business events (see section A.1 Sector Overview). At a global level, the success of the sectors is renowned and, during the last reported year (September 2017 to September 2018), Australia hosted over eight million international visitors. It is currently the tenth largest international tourism market.

Employment growth forecasts indicate that the Tourism, Travel and Hospitality sectors are expected to overtake sub-sectors that are historically dominant in Australia, such as transport, postal warehousing and mining, and so the current and future implications in terms of workforce demand are significant. It is estimated that collectively the workforce size is over one million workers (see section A.2 Employment and Skills Outlook Overview). With the national workforce data available, i.e. the Australian Bureau of Statistics (ABS) and the Department of Jobs and Small Business, employment forecasts show that at least an additional 62,000 workers will be needed over the next five years to fill posts across Tourism, Travel and Hospitality job roles. Role types include kitchenhands, chefs, tourism and travel advisors, conference and event organisers, and hotel managers.

The sectors are strongly interconnected and, collectively, they have been experiencing several challenges which are impacting workforce skill requirements and supply. In summary these include:

- Government legislation and regulation changes (e.g. international skilled worker visa reforms)

- Skills and knowledge shortages, i.e. communication, teamwork, problem solving, self-management, product and service knowledge (such as cultural tourism), data analytics and online and social media
- Lack of career progression opportunities
- Low retention of staff
- New technologies and digitisation.

The Vocational Education and Training (VET) sector is the primary supplier of workers to these sectors and therefore the Training Package plays a critical role in supporting the achievement of employment and growth forecasts. To address the workforce issues raised by industry, an update of 20 qualifications, 21 skill sets and 158 Units of Competency and the development of one new qualification across the SIT Tourism, Travel and Hospitality Training Package is proposed in 2019–20 to align with contemporary industry requirements across:

- Tourism (Project 1)
- Travel (Project 2)
- Hospitality (Project 3) and
- Accommodation (holiday parks and resorts) (Project 4).

Due to the cross-sectoral nature of most of the SIT Units of Competency, the intention is to conduct the projects simultaneously to ensure that reviews and updates are inclusive of all relevant sectors and that efforts are collaborative to avoid duplication of effort.

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

Administrative Information

Industry Reference Committee (IRC)

Tourism, Travel and Hospitality

The Tourism, Travel and Hospitality Industry Reference Committee (IRC) is responsible for ensuring that nationally recognised qualifications deliver the skills and knowledge required to equip the sectors under its remit with a highly skilled workforce. The sectors represent a number of 'people-facing' industry sectors involving Tourism, Travel, Hospitality, Events & Exhibitions and Accommodation (hotels, holiday parks and resorts).

Skills Service Organisation (SSO)

SkillsIQ Limited

SkillsIQ supports 19 IRCs representing diverse 'people-facing' sectors. These sectors provide services to people in a variety of contexts such as customer, patient or client. The IRCs are collectively responsible for overseeing the development and review of Training Package Products, including qualifications, serving the skills needs of sectors comprising almost 50 per cent of the Australian workforce.

IRC Sign-off

Sign-off of this Industry Skills Forecast and Proposed Schedule of Work has been confirmed by the Tourism, Travel and Hospitality Industry Reference Committee.

Bradley Woods,
Chair

A. Skills Forecast

A.1 Sector Overview

Introduction

“Inclusive growth and ensuring a future with quality jobs are the concerns of governments everywhere. Travel & Tourism, which already supports one in every ten jobs on the planet, is a dynamic engine of employment opportunity.”

Gloria Guevara Manzo, President & CEO, World Travel & Tourism Council¹

The Tourism, Travel and Hospitality Training Package supports a diverse range of sectors that comprises multiple product and service offerings, and subsequently multiple job roles and activities. The five sectors specifically in scope are:

- Tourism
- Travel
- Events and Exhibitions
- Accommodation (hotels, holiday parks and resorts); and
- Hospitality.

The sectors are strongly interconnected and together make up one of the largest economic industries in Australia. The strong association between the five sectors of focus therefore means that trends and changes in one will consequently impact the others.

On a global scale, Australia is in the list of top ten countries receiving the largest international tourist spend from overseas visitors,² and this, combined with spend from domestic visitors and businesses, positions this industry as a whole as a significant contributor to both Australia’s GDP and national employment.

Growth in demand across all sectors has been significant over the past decade, and forecasts show this growth is not expected to slow down. By 2026–27, Tourism expenditure is expected to reach \$173 billion,³ and this spend will positively impact demand for commodities and industries including Accommodation; Food and Beverage; the Retail sector; Transportation; the Cultural and Sports sectors; and Recreational services. Growth in demand has been strongly driven by visitors

from Asia, (i.e. China, Japan, India, Malaysia, and Hong Kong SAR) and the domestic market.

Tourism is one of five key growth sectors in Australia, performing 20% above the average productivity of global competitors (registering a productivity index of 127). The economic forecasts across the other sectors in scope are just as strong, and the implications for workforce demand are significant.

National employment growth forecasts indicate that, by 2023, over 62,000 additional workers will be needed to fill posts across the following Tourism, Travel and Hospitality roles:⁴

- Waiters – an additional 21,800 workers will be needed
- Kitchenhands – an additional 16,100 workers
- Chefs – an additional 16,800 workers
- Gallery, Museum and Tour Guides – an additional 1,900 workers
- Tourism and Travel Advisers – an additional 1,300 workers
- Conference and Event Organisers – an additional 5,000 workers
- Hotel/Accommodation Managers – an additional 800 workers.

Since this list of jobs is not exhaustive for the sectors, the actual workforce demand in the upcoming years is expected to be far greater than that reported by these figures.

To achieve further growth and success, access to a highly skilled and knowledgeable workforce is fundamental. The sectors, however, are experiencing significant challenges in accessing and retaining skilled workers. Enrolments in relevant VET qualifications have fallen over the last two reported years (2016 and 2017), and employers are indicating that graduates are not equipped with key skills. Some of the common skills and knowledge areas in which industry has reported shortages include communication, teamwork and problem solving. Developments across the industry relating to technology have meant that online and social media skills have also been increasingly required to support business growth and meet consumer demand and expectations, along with data analytics and Big Data.

As an industry estimated to involve a workforce of over one million with strong employment growth in the upcoming years, the Tourism, Travel and Hospitality Training Package plays a vital role in ensuring workers are equipped with the right skills and knowledge. Skilled workers will not only support sectors to achieve potential growth, but they can also ensure they remain innovative and continue to make important contributions to Australia's economy.

Individual summaries of the five key growth sectors are provided below.

Measuring constraints

The interrelationship of sectors and overlap of activities mean that workforce counts captured across different sources may not be mutually exclusive. For example, while Tourism Research Australia (TRA) states that the current Tourism workforce totals approximately 924,000,⁵ this workforce is not solely attributed to tourism activities, but instead encapsulates a range of related sectors as shown in Figure 1 (e.g. 88,800 for Accommodation, 42,800 for Travel Agency and Tour Operator services, etc.).

Other national workforce sources of data collected by the Australian Bureau of Statistics (ABS) and published by the Department of Jobs and Small Business (via the Labour Market Information Portal) can also be limited in providing a true picture of the sectors in scope (either collectively or individually) for this Training Package. For example, statistics are published according to prescribed Australian and New Zealand Standard Industrial Classification (ANZSIC) and Australian and New Zealand Standard Classification of Occupations (ANZSCO) classifications, but many have been declared by industries as not being accurate descriptors and/or not relevant to actual job roles.

Figure 1: Tourism Employment by Industry, 2016-17 - Persons



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



Tourism Australia

The following sector categories have therefore drawn on national and sector-specific sources in an attempt to provide a comprehensive overview of the sectors and their workforces.



TOURISM: The term Tourism is defined by Tourism Research Australia as:⁶

'...not restricted to leisure activity. It includes travel for business or other reasons, such as education, provided the destination is outside the person's usual environment.'

Tourism is a significant sector in Australia, with the latest accounts showing it directly contributed \$55.3 billion to Australia's Gross Domestic Product (GDP) (2016-17).⁷ Australia hosted 8.4 million international visitors⁸ and 102.7 million domestic visitors during the year

ending September 2018, representing an increase since September 2017 of 6% and 7% respectively.⁹ Reasons for visiting destinations are varied (e.g. business, leisure and/or other personal matters), and the spend of visitors can be just as varied, covering food, drink and accommodation, airfares, tours, education fees, rental vehicles and petrol, and shopping and retail. Overall, international and domestic visitor spend is vast, with \$43.2 billion alone attributed to spending by international visitors and an additional \$135.4 billion to that of domestic visitors.

Tourism is estimated to employ approximately 924,000 Australians,¹⁰ with the workforce spanning a breadth of sub-sectors (Figure 2). The job roles are diverse and include undertaking administrative, supportive, operational, and/or supervisory and management activities.

Figure 2: Tourism's workforce sub-sectors of coverage





TRAVEL: The Travel sector involves the provision of a range of products and services in relation to transportation (e.g. air travel, cruises, and rental cars), accommodation (e.g. hotels, motels and

serviced apartments) and entertainment (e.g. amusement parks, theatres and museums).¹¹ Travel may be for personal, leisure and/or business-related purposes.

Travel agency and tour arrangement services across Australia have been experiencing strong growth over the past five years, generating a sizeable revenue of \$8.2 billion in 2017–18. Forecasts indicate growth will continue to be strong over the next five years (i.e. 4.7% annual growth between 2018 and 2023) to reach \$10.3 billion by 2023.¹² Online travel platforms are today well-established mechanisms in the sector which consumers are increasingly using to self-book travel products and services, generating an additional \$1.1 billion for the sector in Australia. Although online travel booking platforms experience high competition from both domestic and international suppliers, they are not expected to slow down, with forecasts showing expected annual growth of 7.6% over the next five years (2018–2023).¹³

The sector is significantly influenced by key economic trends related to the discretionary income of households, consumer sentiment and the travel choices of residents, especially travel choices to international destinations. Travel is considered by many households to be discretionary expenditure. Any downturns in financial stability or optimism will therefore impact the sector negatively as demand for travel falls. The latest trends, however, show that international travel by Australians has been continuing to grow and measured at nearly 11 million trips in one year (the year ending November 2018), representing an increase of 4.2% from the previous year.¹⁴

The travel agency workforce comprises 32,590 full-time equivalent (FTE) staff. Similar to the Tourism sector, employer demand for staff is strong, with 43% of travel agencies indicating they were looking to employ new staff in 2018.¹⁵ Key job roles in demand include frontline travel consultants, business development and sales staff, and general administrative roles.



EVENTS AND EXHIBITIONS: These are diverse and made up of a range of different sectors representing varied gatherings and event types. The sectors include:¹⁶

- Exhibitions – trade and consumer expos such as:
 - Business to Business (B2B) (i.e. tradeshows and trade fairs)
 - Business to Consumer (B2C)
 - Business to Government (B2G)
- Business events - meetings, conventions, incentives and exhibitions
- Live performances:
 - Ballet and dance
 - Theatre (i.e. plays, musicals, cabarets, physical theatre such as circuses and burlesques)
 - Concerts and performances (i.e. comedy)
 - Opera
 - Festivals and outdoor events (i.e. music, food and beverages, art shows, etc.)
- Community events (i.e. street fairs, charity races, parades, etc.)
- Private events (i.e. weddings and parties, etc.)
- Sporting events.

Events and exhibitions across Australia are significant, and the economic contribution of the various types is considerable. For example, business events contributed \$24.9 billion in GDP in a single year (2015–16);¹⁷ exhibition and conference centre services generated \$11.34 billion in revenue (2017–18);¹⁸ and organisations involved in event promotion and management services generated an additional \$4.36 billion in revenue (2017–18).¹⁹ Globally, Australia is ranked eighth (out of 50 countries) in terms of the volume of direct spending generated by business events.²⁰

Employers are optimistic about the future of the sector and nearly three-quarters (73%) of Australian exhibition companies are expecting their turnover to increase in the first half of 2019.²¹ Two-thirds (66.6%) of organisers/organiser associations and 88% of venues indicated that they planned to deliver or host new exhibitions last year

(2018).²² This forecast growth is matched with strong forecast employment growth.

Workforce estimates show that in 2017, business events alone across Australia generated approximately 193,000 jobs in a single year.²³ During the same year (i.e. 2017–18) over 55,000 workers were involved in organising and hosting exhibitions and conferences²⁴ and an additional 29,700 workers were undertaking event promotion and management services.²⁵

Trends such as digitalisation and technological innovation, growth in international competition, workforce mobility, and growing customer demand and expectations for live experiences²⁶ have impacted the industry. As a result, the skills and knowledge needs of the industry's workforce have been shifting.

A Case for Change proposing an update of qualifications and related Units of Competency and skill sets supporting the events and exhibition sector was submitted to the Australian Industry and Skills Committee (AISC) for consideration in March 2019. The aim of this project will be to ensure Training Package Products adapt to the enormous changes occurring across the sector, and specifically in business events, and to ensure they stay current and relevant to industry practices.²⁷



ACCOMMODATION: The Accommodation sector is involved in providing a range of accommodation offerings, usually for short-term stays. The types of accommodation can include:²⁸

- Camping grounds
- Caravan parks
- Holiday houses and flats
- Hotels
- Motels
- Resorts
- Serviced apartments
- Ski-lodges
- Youth hostels.

Each accommodation type has, to some extent, experienced continual revenue growth over the past five years ranging from 5.9% for serviced apartments and 3.4% for hotels and resorts to 0.4% for motels. The latest estimates show the revenue generated from the sector is well into the billions, with hotels and resorts alone generating \$12.6 billion in 2018–19.²⁹

During 2017-18, international and domestic visitors spent a total of 271 million and 368.2 million nights

away from their residential home for travel purposes, with both seeing increases from the year before.

The most popular types of accommodation used by international visitors were rented houses, apartments, flats or units (106 million nights were spent in these facilities),³⁰ whereas domestic travellers instead (after excluding staying with friends and family) were more prone to staying in hotels, resorts, motels or motor inns (94 million nights).³¹

Trends in the travel choices of international and domestic visitors are the key influencers of the sector, and their preferences for accommodation types

has been shifting over time. For example, between the year ending September 2017 and September 2018, there was a 9% increase in overnight stays by domestic visitors in caravan parks or camping grounds (including commercial and non-commercial types), with growth attributed to younger visitors aged 20–29 years.³² International visitors, although at a lower rate of growth, are also choosing to stay in caravans and camping grounds.

Licensed serviced apartments are a popular form of accommodation today with both international and domestic visitors, and are particularly popular with families as an alternative to hotels.

The Accommodation sector's workforce comprises 112,400 workers.³³ Overall, the job roles supporting the sector can be varied, ranging from resort/holiday park managers and marketing roles, to groundskeepers, handypersons and housekeepers.



HOSPITALITY: The Hospitality sector represents a range of food and beverage services such as restaurants, cafés and coffee shops, pubs and bars, clubs (e.g. RSL, Leagues, Golf, etc.) and nightclubs

and casinos. Catering operations are also involved in providing an extensive range of food and beverage services across the country to individuals and/or organisations in different industries.

Consumer trends regarding health consciousness and increasingly busier and time-poor lifestyles have had a positive impact on the sector, with demand growing steadily for eating out and/or ordering ready-made meals. Restaurants in Australia have particularly benefited from growth in consumer demand for quality food and dining experiences, having generated an annual revenue of \$18.7 billion in the year 2018–19, and registering an annual growth over the last five years of just under 2%.³⁴ Other provider types such as pubs, bars and nightclubs, as well as cafés and coffee shops, have also noted a similar growth in popularity with the sub-sectors generating \$17.3 billion³⁵ and \$9.8 billion³⁶ in annual revenue respectively.

Online platforms, social media and technology in general have been shaping the sector significantly.

The ‘sharing economy’ has prompted the establishment of platforms such as UberEATS and Menulog, providing large online food ordering and delivery services to further expand the reach of restaurants across the market. Social media, such as Facebook, Instagram and Pinterest, has transformed many industries, and the Hospitality sector has undoubtedly experienced the true impact of its potential, with more than one in five Instagram users posting a photograph of their food (i.e. ‘foodstagramming’).³⁷ Using online reviews and commentary to make decisions regarding dining, food and beverage choices is now common practice.

The sector comprises an extensive variety of job roles ranging from administrative and service-based roles (e.g. hosts and waiters) to operational (e.g. kitchenhands and cooks), and supervisory and management positions (e.g. head chefs, kitchen managers). It is a sector, however, that is experiencing significant workforce shortages. In December 2018, over 5,000 jobs for roles in food

preparation and food assistance were advertised, showing a general increase over the months.³⁸

The food and beverage services workforce comprises 777,300 workers, making it one of the largest employing sub-sectors in Australia, and employing a larger workforce than traditional industries such as transport, postal and warehousing (collectively employing 627,600 workers), agriculture, forestry and fishing (employing 325,600 workers) and mining (employing 234,300 workers).³⁹ The clubs industry alone employed 130,000 workers (which is equivalent to 85,000 FTE staff) in 2015, as captured in the *2015 Clubs Census* conducted on behalf of NSW Clubs and Clubs Australia by KPMG.⁴⁰ Collectively, therefore, the extent of employment across this sector is undoubtedly significant for Australia.



Businesses Involved

Businesses operating in the service areas outlined above represent a range of public and private, small, medium and large enterprises, and are spread all across the country. The majority of businesses, however, are commercially run micro- to small-sized businesses. Using the latest statistics, some examples and counts of relevant business types involved in hiring workers supported by the Tourism, Travel and Hospitality Training Package across Australia include (i.e. number of businesses):⁴¹

Business Type	June 2016	June 2017
Tourism 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.	278,977	288,614 ⁴²
	2017-18	2018-19
Event Promotion and Management Services Businesses that provide event management, event promotion and ticketing services. They can also include tourist information centres.	7,805	7,899
Exhibition and Conference Centres Businesses that organise and/or host exhibitions and conferences.	2,150	2,169
Amusement Parks and Centres 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.	1,003	1,024
Travel Agency and Tour Arrangement Services 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.	6,339	6,551
Online Travel Bookings Only 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.	47	46
Caravan Parks and Camping Grounds Businesses that run powered and unpowered holiday parks, caravan parks and camping grounds that provide short-term and/or long-term accommodation.	1,320	1,311
Hotels and Resorts 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.	622	624
Motels Businesses including motels and guesthouses with 15 or more rooms. They provide accommodation in the form of rooms or suites.	1,948	1,934
Bed and Breakfast Accommodation Businesses primarily provide short-term hosted accommodation, with breakfast included.	733	730
Restaurants Businesses that mainly provide food and beverages for consumption on the premises. It includes licensed, unlicensed and BYO restaurants.	26,740	27,326
Cafés and Coffee Shops 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.	19,730	20,375
Pubs, Bars and Nightclubs Businesses that can sell alcohol for consumption either on the premises or off the premises.	6,171	6,077
Social Clubs* Businesses that represent gambling, sporting, recreational and social (such as RSL) clubs or associations that generate income predominantly from hospitality services.	5,149	5,074
Casinos 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.	8	9

*It is noted that the 2015 Clubs Census conducted on behalf of NSW Clubs and Clubs Australia by KPMG⁴³ reported that there were 6,413 clubs in 2015.

Stakeholders

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

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

Challenges and Opportunities

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

Government legislation and regulation changes

The Tourism, Travel and Hospitality industry is governed by a series of national and state- and territory-based legislation and regulations, and recent changes have specifically impacted the workforce and working conditions. For example:

- Reforms to international skilled visa eligibility conditions came into effect in 2018, and this has meant that a new Temporary Skills Shortage (TSS) visa program has been introduced, enforcing stricter conditions for gaining working visas in Australia compared to the abolished 457 work visa.
- Although not new, licensing and regulation protocols

across states and territories continue to vary in some areas, with specific mentions voiced by industry regarding the difference in requirements across jurisdictions regarding the Responsible Service of Alcohol (RSA)

- Other areas of regulatory change include food regulations and planning regulations which have impacted industry.

Such reforms and existing conditions are disrupting the workforce landscape, with employers indicating that they now face additional barriers to accessing skilled workers for their Australian operations.

Skills and knowledge shortages

Issues with employees' skill levels are experienced across Australia in all sub-sectors of the Tourism, Travel and Hospitality industry. Seven in ten employers (69%) in the sector reported skills deficiencies in their workforce, an increase of 11 percentage points since 2011, and the situation is not improving. It is estimated that by 2020 there will be a skills shortage of 30,000 additional workers in the Tourism sector.⁴⁴ Within the Tourism industry, café and restaurant businesses reported the greatest level of difficulties with the recruitment and retention of staff, compared to accommodation and attraction industries.⁴⁵

Employers reported that key skills shortages were due to a lack of experience in Tourism and a mismatch between an individual's skills and the role requirements. Furthermore, access to training and low retention rates in training courses are also contributing factors to the skills shortages experienced in the sector.

Tourism, Travel and Hospitality have collectively evolved considerably over the years and some of the key skills and knowledge gaps reported represent a combination of technical and 'soft' skills:

- Communication
- Teamwork
- Problem solving
- Initiative and enterprise (i.e. commercial acumen)
- Self-management
- Product and service content (e.g. cultural tourism)
- Data analytics
- Online and social media.

Online and social media skills; Information and Communication Technologies (ICT) and technology skills to embrace Artificial Intelligence (AI); online community connections; 'Big Data'; and data analytics have been identified in the Beyond Tourism 2020 Steering Committee Report to Government as key skills challenges facing the Tourism sector.⁴⁶

Lack of career progression

The career pathways available in Tourism, Travel and Hospitality can be endless but are also unknown. 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 in the Accommodation and Events and Exhibitions sectors also offer similar opportunities to move into management and/or business ownership positions. However, the predominance of young and casual workers in the sectors may create the perception that there is a lack of long-term career pathways. As a result, it is necessary for industry to build and promote visible career pathways. Also, due to the predominant small-business nature of employers in the sector, career progression within a single business is challenging, resulting in employees moving from one employer to another to realise their career aspirations.

The Tourism, Travel and Hospitality IRC is currently taking forward a review of the Commercial Cookery Training Package Products with the aim of streamlining qualifications and creating new pathways to support the entry to, and visibility of, career progression across the sector.⁴⁷

Retention of staff

The Tourism, Travel and Hospitality sectors have a relatively young and casual workforce. The median age for workers is 26 years, which is significantly lower than the national workforce average age of 40 years.⁴⁸ Young workers generally have other commitments to prioritise such as full-time or part-time study, and issues regarding attitude and reliability are often raised by employers as impacting the retention of staff. Regional areas are especially having difficulties in accessing and retaining workers. As populations stay concentrated in metropolitan areas,

and young people in regional and rural communities continue to migrate to coastal areas and cities to study at the higher education level, the pool of workers to whom employers have access is both small and temporary, as workers move to other locations.

As at November 2018, there were 900,100 persons employed in the Accommodation and Food Services industry.⁴⁹ A high proportion of activity in these sectors occurs during three of the seven days of the week, and industry therefore needs to engage casuals. This trait, however, depicts a transient workforce which will be more inclined to leave a job (and the industry) as individuals are not incentivised with permanent conditions of employment.

New technologies and digitalisation

As consumers embrace technological devices and tools to improve daily living, industries have adopted technologies to better engage with consumers.⁵⁰ For instance, over the past five years there has been a 37% increase in mobile handset subscribers in Australia, reaching a new high of 26.9 million.⁵¹ This level of access to mobile devices (and consequently internet subscriptions) has required traders to adopt online shopping and online engagement activities. Online travel and reservation bookings are a significant element within the sector, together with other important technologies and digital initiatives including:

- **Augmented Reality and Virtual Reality (AR and VR):**⁵² These are increasingly used by businesses for content marketing and to enhance the customer experience.
- **Artificial Intelligence (AI) – Travel Bots:**⁵³ This is a customer service component where businesses are using virtual chatbots and assistants to address holiday and travel enquiries.
- **Voice-recognition technology:**⁵⁴ This is used to capture orders.
- **M-commerce (mobile commerce):** This is a sub-set of e-commerce which includes buying and selling via smartphones and tablets, and includes mobile content purchases such as those made via 'apps'.
- **Tabletop devices:** These are used to order and pay when dining.



Tourism Australia

The adoption of technology involving online engagement and automation means workforce skills requirements have changed and will continue to change to reflect new working environments - for example, waitstaff adapting to new devices to capture orders and payments, and managers gaining access to more in-depth customer data to better understand consumer behaviour and to target products and services.

Vocational Education and Training (VET) Qualifications Supporting Industry

The nationally recognised VET qualifications that cater to this sector are:

Tourism and Travel

- SIT10116 Certificate I in Tourism (Australian Indigenous Culture)
- SIT20116 Certificate II in Tourism
- SIT30116 Certificate III in Tourism
- SIT30216 Certificate III in Travel
- SIT40116 Certificate IV in Travel and Tourism
- SIT50116 Diploma of Travel and Tourism Management
- SIT60116 Advanced Diploma of Travel and Tourism Management
- SIT30316 Certificate III in Guiding
- SIT40216 Certificate IV in Guiding

Events and exhibitions

- SIT30516 Certificate III in Events
- SIT50316 Diploma of Event Management
- SIT60216 Advanced Diploma of Event Management

Hospitality

- SIT10216 Certificate I in Hospitality
- SIT20316 Certificate II in Hospitality
- SIT30616 Certificate III in Hospitality
- SIT30716 Certificate III in Hospitality (Restaurant Front of House)
- SIT40416 Certificate IV in Hospitality
- SIT50416 Diploma of Hospitality Management
- SIT60316 Advanced Diploma of Hospitality Management.
- SIT20416 Certificate II in Kitchen Operations
- SIT30816 Certificate III in Commercial Cookery
- SIT40516 Certificate IV in Commercial Cookery
- SIT30916 Certificate III in Catering Operations
- SIT40616 Certificate IV in Catering Operations
- SIT20516 Certificate II in Asian Cookery
- SIT31116 Certificate III in Asian Cookery
- SIT40816 Certificate IV in Asian Cookery
- SIT31016 Certificate III in Patisserie
- SIT40716 Certificate IV in Patisserie

Accommodation

- SIT20216 Certificate II in Holiday Parks and Resorts
- SIT30416 Certificate III in Holiday Parks and Resorts
- SIT40316 Certificate IV in Holiday Parks and Resorts
- SIT50216 Diploma of Holiday Park and Resort Management

Table 1: Number of Registered Training Organisations (RTOs) by nationally recognised **Tourism, Travel and Hospitality** qualifications on scope – Tourism, Travel and Hospitality Training Package Products

Qualification Code	Qualification Title	No. of RTOs with Qualification on Scope
Tourism and Travel		
SIT10116	Certificate I in Tourism (Australian Indigenous Culture)	22
SIT20116	Certificate II in Tourism	128
SIT30116	Certificate III in Tourism	84
SIT30216	Certificate III in Travel	46
SIT40116	Certificate IV in Travel and Tourism	43
SIT50116	Diploma of Travel and Tourism Management	62
SIT60116	Advanced Diploma of Travel and Tourism Management	23
SIT30316	Certificate III in Guiding	23
SIT40216	Certificate IV in Guiding	10
Events and Exhibitions		
SIT30516	Certificate III in Events	46
SIT50316	Diploma of Event Management	54
SIT60216	Advanced Diploma of Event Management	18
Hospitality		
SIT10216	Certificate I in Hospitality	192
SIT20316	Certificate II in Hospitality	420
SIT30616	Certificate III in Hospitality	348
SIT30716	Certificate III in Hospitality (Restaurant Front of House)	27
SIT40416	Certificate IV in Hospitality	182
SIT50416	Diploma of Hospitality Management	256
SIT60316	Advanced Diploma of Hospitality Management	115
SIT20416	Certificate II in Kitchen Operations	200
SIT30816	Certificate III in Commercial Cookery	198
SIT40516	Certificate IV in Commercial Cookery	184
SIT30916	Certificate III in Catering Operations	28
SIT40616	Certificate IV in Catering Operations	4

Qualification Code	Qualification Title	No. of RTOs with Qualification on Scope
SIT20516	Certificate II in Asian Cookery	3
SIT31116	Certificate III in Asian Cookery	16
SIT40816	Certificate IV in Asian Cookery	12
SIT31016	Certificate III in Patisserie	56
SIT40716	Certificate IV in Patisserie	43
Accommodation		
SIT20216	Certificate II in Holiday Parks and Resorts	5
SIT30416	Certificate III in Holiday Parks and Resorts	10
SIT40316	Certificate IV in Holiday Parks and Resorts	6
SIT50216	Diploma of Holiday Park and Resort Management	5

Source: Training.gov.au. RTOs approved to deliver this qualification. Accessed 14 January 2019.

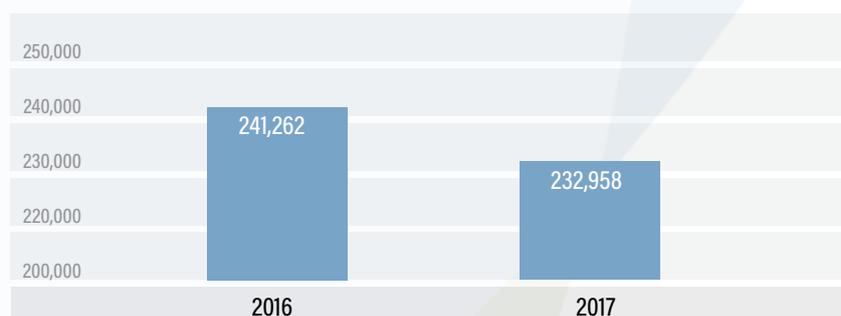
Enrolments and Completions

In 2017, there were approximately **233,000** enrolments across all VET qualifications catered for by the Tourism Travel and Hospitality Training Package products. This represents a small decrease of 3.4% (equivalent to 8,304 enrolments) from the previous year (Figure 3).

The most popular qualifications in 2017 were:

- SIT20316 - Certificate II in Hospitality (34,922 enrolments)
- SIT20416 - Certificate II in Kitchen Operations (26,145 enrolments).

Figure 3: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope - Tourism, Travel and Hospitality - 2014 to 2017



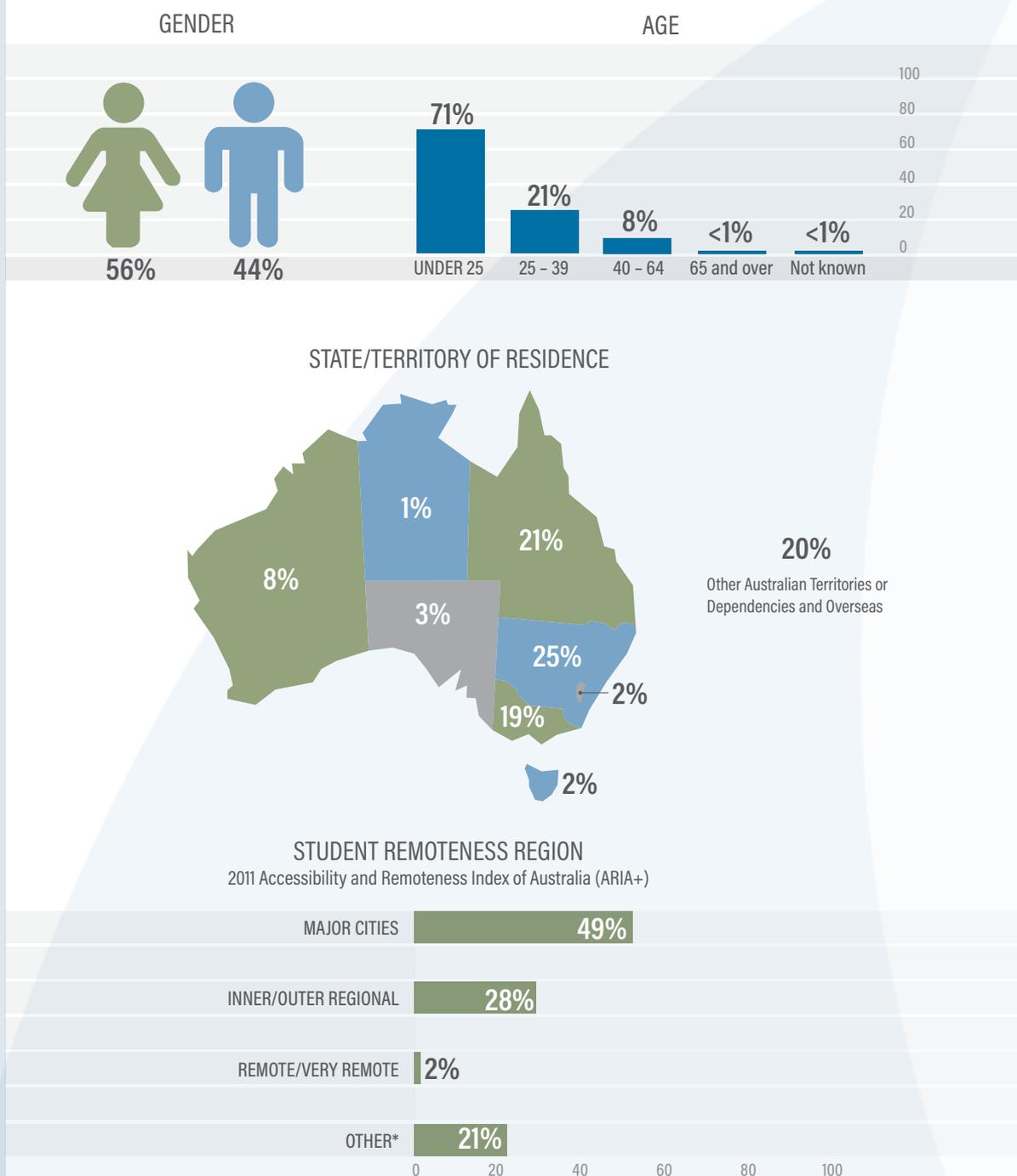
General notes on statistics:

1. Enrolment and completion data is sourced from NCVER VOCSTATS (program enrolments and completions 2016–2017), accessed December 2018.
2. It is important to note that not all training providers were required to submit enrolment and completion data at the time of collection, and some figures presented may therefore under-represent the true count of enrolments and completions for a qualification. From 2018, **all** training providers were required to submit data, and current discrepancies noted in the national NCVER figures versus actual attendance should therefore be minimal in future releases. The data presented in this report is shown for indicative purposes.
3. Figures reflect public and private RTO data.
4. Completion data for 2017 represents preliminary outcomes (i.e. not a full year).
5. ‘-’ symbol indicates that the qualification was not listed in NCVER data at the time of reporting.
6. Qualifications in italics represent superseded qualifications.

A snapshot of key traits of the *SIT Tourism, Travel and Hospitality Training Package* enrolments for 2017 is provided below, followed by a breakdown of enrolments and completions for individual qualifications (see Tables 2a, 2b, 3a and 3b).

2017 ENROLMENT SNAPSHOT

TOURISM, TRAVEL AND HOSPITALITY TRAINING PACKAGE PRODUCTS



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

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



Table 2a: Total number of enrolments (Total VET Activity [TVA]) by nationally recognised qualifications on scope – Tourism, Travel and Hospitality Training Package Products, 2016–2017

Qualification	Qualification Title	2016	2017
Tourism and Travel			
SIT10116	Certificate I in Tourism (Australian Indigenous Culture)	31	102
<i>SIT10112</i>	<i>Certificate I in Tourism (Australian Indigenous Culture)</i>	228	2
SIT20116	Certificate II in Tourism	656	4,987
<i>SIT20112</i>	<i>Certificate II in Tourism</i>	5,178	778
SIT30116	Certificate III in Tourism	362	2,922
<i>SIT30112</i>	<i>Certificate III in Tourism</i>	5,083	1,619
SIT30216	Certificate III in Travel	369	2,950
<i>SIT31312</i>	<i>Certificate III in Travel</i>	6,602	2,354
SIT40116	Certificate IV in Travel and Tourism	53	1,853
<i>SIT40212</i>	<i>Certificate IV in Travel and Tourism</i>	1,573	1,209
SIT50116	Diploma of Travel and Tourism Management	233	1,654
<i>SIT50112</i>	<i>Diploma of Travel and Tourism</i>	3,350	1,475
SIT60116	Advanced Diploma of Travel and Tourism Management	22	305
<i>SIT60112</i>	<i>Advanced Diploma of Travel and Tourism</i>	529	249
SIT30316	Certificate III in Guiding	23	219
<i>SIT30513</i>	<i>Certificate III in Guiding</i>	284	23
SIT40216	Certificate IV in Guiding	5	129
<i>SIT40112</i>	<i>Certificate IV in Guiding</i>	150	20
Events and Exhibitions			
SIT30516	Certificate III in Events	48	2,133
<i>SIT30612</i>	<i>Certificate III in Events</i>	2,977	709
SIT50316	Diploma of Event Management	329	2,120
<i>SIT50212</i>	<i>Diploma of Events</i>	5,842	1,538
SIT60216	Advanced Diploma of Event Management	14	110
<i>SIT60212</i>	<i>Advanced Diploma of Events</i>	175	37
Hospitality			
SIT10216	Certificate I in Hospitality	735	5,727
<i>SIT10213</i>	<i>Certificate I in Hospitality</i>	5,818	780
SIT20316	Certificate II in Hospitality	2,487	34,922
<i>SIT20213</i>	<i>Certificate II in Hospitality</i>	44,606	13,729
SIT30616	Certificate III in Hospitality	3,698	24,524
<i>SIT30713</i>	<i>Certificate III in Hospitality</i>	33,331	10,451

Qualification	Qualification Title	2016	2017
SIT30716	Certificate III in Hospitality (Restaurant Front of House)	45	123
SIT40416	Certificate IV in Hospitality	553	4,159
<i>SIT40313</i>	<i>Certificate IV in Hospitality</i>	<i>14,980</i>	<i>1,576</i>
SIT50416	Diploma of Hospitality Management	1,144	10,327
<i>SIT50313</i>	<i>Diploma of Hospitality</i>	<i>10,088</i>	<i>4,022</i>
SIT60316	Advanced Diploma of Hospitality Management	844	4,783
<i>SIT60313</i>	<i>Advanced Diploma of Hospitality</i>	<i>4,887</i>	<i>2,647</i>
SIT20416	Certificate II in Kitchen Operations	466	26,145
<i>SIT20312</i>	<i>Certificate II in Kitchen Operations</i>	<i>32,646</i>	<i>10,175</i>
SIT30816	Certificate III in Commercial Cookery	1,990	18,406
<i>SIT30813</i>	<i>Certificate III in Commercial Cookery</i>	<i>25,869</i>	<i>10,356</i>
SIT40516	Certificate IV in Commercial Cookery	870	10,031
<i>SIT40413</i>	<i>Certificate IV in Commercial Cookery</i>	<i>9,538</i>	<i>4,253</i>
SIT30916	Certificate III in Catering Operations	18	466
<i>SIT31013</i>	<i>Certificate III in Catering Operations</i>	<i>7,088</i>	<i>305</i>
SIT40616	Certificate IV in Catering Operations	-	-
SIT20516	Certificate II in Asian Cookery	-	-
SIT31116	Certificate III in Asian Cookery	40	273
<i>SIT30913</i>	<i>Certificate III in Asian Cookery</i>	<i>445</i>	<i>113</i>
SIT40816	Certificate IV in Asian Cookery	6	76
<i>SIT40513</i>	<i>Certificate IV in Asian Cookery</i>	<i>225</i>	<i>78</i>
SIT31016	Certificate III in Patisserie	76	1,903
<i>SIT31113</i>	<i>Certificate III in Patisserie</i>	<i>2,400</i>	<i>727</i>
SIT40716	Certificate IV in Patisserie	50	1,352
<i>SIT40713</i>	<i>Certificate IV in Patisserie</i>	<i>1,953</i>	<i>782</i>
Accommodation			
SIT20216	Certificate II in Holiday Parks and Resorts	-	-
SIT30416	Certificate III in Holiday Parks and Resorts	2	123
<i>SIT31212</i>	<i>Certificate III in Holiday Parks and Resorts</i>	<i>185</i>	<i>53</i>
SIT40316	Certificate IV in Holiday Parks and Resorts	0	10
<i>SIT40812</i>	<i>Certificate IV in Holiday Parks and Resorts</i>	<i>9</i>	<i>0</i>
SIT50216	Diploma of Holiday Park and Resort Management	0	39
<i>SIT50412</i>	<i>Diploma of Holiday Parks and Resorts</i>	<i>54</i>	<i>25</i>

Source: NCVET VOCSTATS, accessed December 2018.

Table 2b: Total number of apprentice and trainee enrolments by nationally recognised qualifications on scope – selected Tourism, Travel and Hospitality Training Package Products, 2016–2017

Qualification	Qualification Title	2016	2017
SIT20416	Certificate II in Kitchen Operations	151	784
<i>SIT20312</i>	<i>Certificate II in Kitchen Operations</i>	<i>930</i>	<i>205</i>
SIT30816	Certificate III in Commercial Cookery	17,834	36,672
<i>SIT30813</i>	<i>Certificate III in Commercial Cookery</i>	<i>1,627</i>	<i>9,733</i>
SIT40516	Certificate IV in Commercial Cookery	203	682
<i>SIT40413</i>	<i>Certificate IV in Commercial Cookery</i>	<i>450</i>	<i>249</i>
SIT30916	Certificate III in Catering Operations	49	99
<i>SIT31013</i>	<i>Certificate III in Catering Operations</i>	<i>1,313</i>	<i>341</i>
SIT31116	Certificate III in Asian Cookery	174	321
<i>SIT30913</i>	<i>Certificate III in Asian Cookery</i>	<i>915</i>	<i>499</i>
SIT31016	Certificate III in Patisserie	146	372
<i>SIT31113</i>	<i>Certificate III in Patisserie</i>	<i>713</i>	<i>171</i>
SIT40716	Certificate IV in Patisserie	165	247
<i>SIT40713</i>	<i>Certificate IV in Patisserie</i>	<i>377</i>	<i>178</i>

Source: NCVET VOCSTATS, accessed February 2019.

Note: Numbers represent the sum of quarters for that year (i.e. Jan-Mar, Apr-Jun, Jul-Sept, Oct-Dec) and are an estimate of apprentice and trainee activity. An apprentice or trainee is a person undertaking vocational training through a contracted training arrangement.

Table 3a: Total number of completions (Total VET Activity [TVA]) by nationally recognised qualifications on scope – Tourism, Travel and Hospitality Training Package Products, 2016–2017

Qualification	Qualification Title	2016	2017
Tourism and Travel			
SIT10116	Certificate I in Tourism (Australian Indigenous Culture)	12	7
<i>SIT10112</i>	<i>Certificate I in Tourism (Australian Indigenous Culture)</i>	<i>172</i>	<i>0</i>
SIT20116	Certificate II in Tourism	117	2,467
<i>SIT20112</i>	<i>Certificate II in Tourism</i>	<i>2,683</i>	<i>340</i>
SIT30116	Certificate III in Tourism	79	569
<i>SIT30112</i>	<i>Certificate III in Tourism</i>	<i>1,604</i>	<i>880</i>
SIT30216	Certificate III in Travel	134	522
<i>SIT31312</i>	<i>Certificate III in Travel</i>	<i>2,524</i>	<i>1,536</i>
SIT40116	Certificate IV in Travel and Tourism	8	186

Qualification	Qualification Title	2016	2017
SIT40212	<i>Certificate IV in Travel and Tourism</i>	524	610
SIT50116	Diploma of Travel and Tourism Management	21	381
SIT50112	<i>Diploma of Travel and Tourism</i>	1,184	905
SIT60116	Advanced Diploma of Travel and Tourism Management	3	50
SIT60112	<i>Advanced Diploma of Travel and Tourism</i>	218	155
SIT30316	Certificate III in Guiding	13	85
SIT30513	<i>Certificate III in Guiding</i>	122	12
SIT40216	Certificate IV in Guiding	5	83
SIT40112	<i>Certificate IV in Guiding</i>	75	2
Events and Exhibitions			
SIT30516	Certificate III in Events	14	495
SIT30612	<i>Certificate III in Events</i>	944	273
SIT50316	Diploma of Event Management	8	440
SIT50212	<i>Diploma of Events</i>	1,358	584
SIT60216	Advanced Diploma of Event Management	3	46
SIT60212	<i>Advanced Diploma of Events</i>	78	40
Hospitality			
SIT10216	Certificate I in Hospitality	215	3,537
SIT10213	<i>Certificate I in Hospitality</i>	2,764	298
SIT20316	Certificate II in Hospitality	421	7,014
SIT20213	<i>Certificate II in Hospitality</i>	12,086	5,391
SIT30616	Certificate III in Hospitality	398	6,204
SIT30713	<i>Certificate III in Hospitality</i>	11,974	4,765
SIT30716	Certificate III in Hospitality (Restaurant Front of House)	0	29
SIT40416	Certificate IV in Hospitality	33	572
SIT40313	<i>Certificate IV in Hospitality</i>	1,193	632
SIT50416	Diploma of Hospitality Management	384	3,663
SIT50313	<i>Diploma of Hospitality</i>	4,021	2,217
SIT60316	Advanced Diploma of Hospitality Management	127	766
SIT60313	<i>Advanced Diploma of Hospitality</i>	929	792
SIT20416	Certificate II in Kitchen Operations	134	3,431

Qualification	Qualification Title	2016	2017
SIT20312	<i>Certificate II in Kitchen Operations</i>	5,526	3,426
SIT30816	Certificate III in Commercial Cookery	245	3,985
SIT30813	<i>Certificate III in Commercial Cookery</i>	8,180	4,053
SIT40516	Certificate IV in Commercial Cookery	319	3,727
SIT40413	<i>Certificate IV in Commercial Cookery</i>	5,346	2,421
SIT30916	Certificate III in Catering Operations	0	54
SIT31013	<i>Certificate III in Catering Operations</i>	593	129
SIT40616	Certificate IV in Catering Operations	-	-
SIT20516	Certificate II in Asian Cookery	-	-
SIT31116	Certificate III in Asian Cookery	0	148
SIT30913	<i>Certificate III in Asian Cookery</i>	263	43
SIT40816	Certificate IV in Asian Cookery	12	69
SIT40513	<i>Certificate IV in Asian Cookery</i>	107	58
SIT31016	Certificate III in Patisserie	8	451
SIT31113	<i>Certificate III in Patisserie</i>	873	382
SIT40716	Certificate IV in Patisserie	32	299
SIT40713	<i>Certificate IV in Patisserie</i>	585	418
Accommodation			
SIT20216	Certificate II in Holiday Parks and Resorts	-	-
SIT30416	Certificate III in Holiday Parks and Resorts	0	11
SIT31212	<i>Certificate III in Holiday Parks and Resorts</i>	44	18
SIT40316	Certificate IV in Holiday Parks and Resorts	0	6
SIT40812	<i>Certificate IV in Holiday Parks and Resorts</i>	1	0
SIT50216	Diploma of Holiday Park and Resort Management	0	22
SIT50412	<i>Diploma of Holiday Parks and Resorts</i>	16	19

Source: NCVET VOCSTATS, accessed December 2018.



Table 3b: Total number of apprentice and trainee completions by nationally recognised qualifications on scope – selected Tourism, Travel and Hospitality Training Package Products, 2016–2017

Qualification	Qualification Title	2016	2017
SIT20416	Certificate II in Kitchen Operations	0	39
SIT20312	<i>Certificate II in Kitchen Operations</i>	114	53
SIT30816	Certificate III in Commercial Cookery	13	768
SIT30813	<i>Certificate III in Commercial Cookery</i>	1,986	1,261
SIT40516	Certificate IV in Commercial Cookery	1	12
SIT40413	<i>Certificate IV in Commercial Cookery</i>	23	12
SIT30916	Certificate III in Catering Operations	0	3
SIT31013	<i>Certificate III in Catering Operations</i>	191	65
SIT31116	Certificate III in Asian Cookery	0	6
SIT30913	<i>Certificate III in Asian Cookery</i>	51	33
SIT31016	Certificate III in Patisserie	0	17
SIT31113	<i>Certificate III in Patisserie</i>	64	24
SIT40716	Certificate IV in Patisserie	0	0
SIT40713	<i>Certificate IV in Patisserie</i>	17	13

Source: NCVET VOCSTATS, accessed February 2019.

Note: Numbers represent the sum of quarters for that year (i.e. Jan-Mar, Apr-Jun, Jul-Sept, Oct-Dec) and are an estimate of apprentice and trainee activity. An apprentice or trainee is a person undertaking vocational training through a contracted training arrangement.

A.2 Employment and Skills Outlook Overview

Employment – Current and Projected

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

The current definitions, and the labelling used for some ANZSIC and ANZSCO codes, as well as the aggregation of roles across codes, can be limited in providing a true picture of some sectors' workforces. Sectors can host a multitude of job functions, and consequently comprise job titles which go beyond the categories listed in ANZSCO. The statistics in this section are provided as an indicative overview of the sector only.

Job roles covered by the Tourism, Travel and Hospitality Training Package Products are varied and represent a wide breadth of job functions and activities within the Tourism, Travel, Events and Exhibitions, Hospitality and Accommodation sectors. Relevant roles captured within ANZSCO categories are:

ANZSCO code	ANZSCO label
Tourism and Travel	
4514	Gallery, Museum and Tour Guides
4516	Tourism and Travel Advisers
4517	Travel Attendants
Events and Exhibitions	
1493	Conference and Event Organisers
Hospitality	
1411	Café and Restaurant Managers
4311	Bar Attendants and Baristas
4312	Café Workers
4315	Waiters
3511	Bakers and Pastrycooks
3513	Chefs
3514	Cooks
4319	Other Hospitality Workers
8511	Fast Food Cooks
8512	Food Trades Assistants
8513	Kitchenhands
1414	Licensed Club Managers
4313	Gaming Workers
4310	Hospitality Workers (nfd) (no further details)
Accommodation	
4314	Hotel Service Managers
1412	Caravan Park and Camping Ground Managers
1413	Hotel and Motel Managers
1419	Other Accommodation and Hospitality Managers

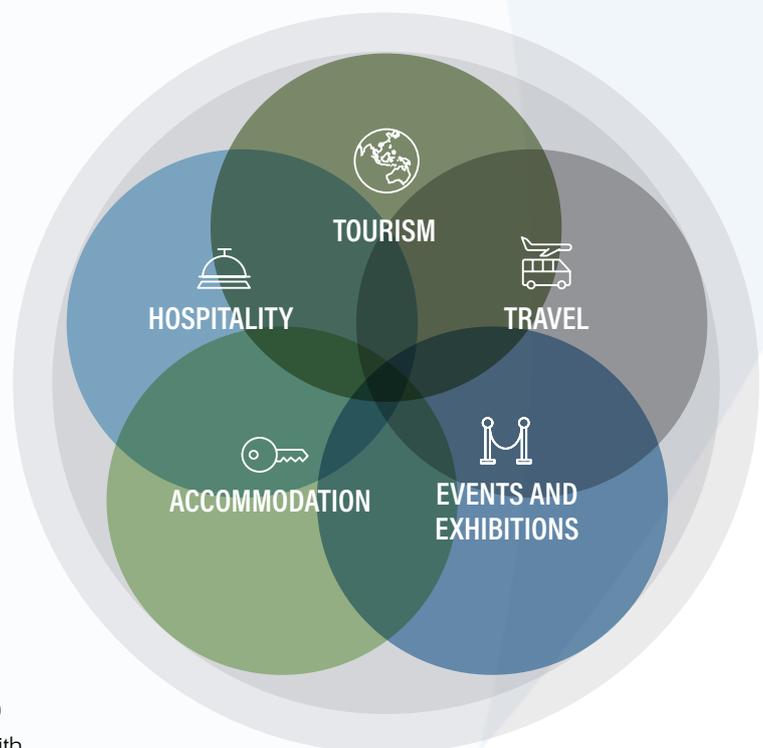
Please note that the job roles within the sectors of scope for the Training Package are numerous and go beyond this list. For example, catering operations and event management involve a range of relevant occupations. However, due to the way national data is collected, a true account of the workforce is not available, and neither are accurate employment forecasts. The figures are therefore presented as indicative only.

The Accommodation and Food Services industry employed approximately **897,500 workers** based on May 2018 figures released by the Department of Jobs and Small Business. However, the most recent release shows that this number had grown to 900,100 by November 2018⁵⁵ across Australia, with nearly 9 in 10 of these workers (87% or 777,300 workers) employed in the food and beverage services sector. The travel agency and tour arrangement services sector employs an **additional 45,800 workers**. **16,200 workers** and **11,600 workers** respectively are involved in amusement and other recreational activities, and the operation of museums.⁵⁶

Workforce estimates for other sectors captured in different data sources show that:

- **598,200 individuals are employed** in Tourism (Tourism Research Australia)⁵⁷
- Approximately **28,000 full-time equivalent (FTE) staff** are employed by Australian travel agents, with 19,830 in travel consultant roles (Australian Federation of Travel Agents)⁵⁸
- **179,300 jobs** were generated as a result of 412,000 business events held in one year (Business Events Council of Australia)⁵⁹
- **Over 55,000 people are employed** in organising and hosting exhibitions and conferences, and an additional **29,700 are employed** in event promotion and management services (IBIS World).⁶⁰

As discussed earlier in the report (see A.1 Sector Overview, Figure 1), the interconnection between the five sectors is extensive and this translates into overlaps in workforce numbers across the sectors. For example, 88,800 workers in Accommodation are attributed to direct Tourism employment, and 167,900 workers in cafés, restaurants and takeaway food services are also attributed to direct Tourism employment, according to Tourism Research Australia.⁶¹



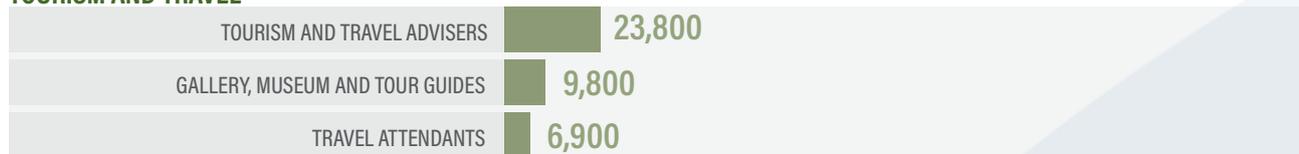
In the aggregate, the size of the workforce supported by the Tourism, Travel and Hospitality Training Package Products may be estimated to be well **over one million**.

With the occupational data available, Figure 4 outlines the size of the workforce across selected ANZSCO job roles supported by the Tourism, Travel and Hospitality Training Package. Staff in Hospitality represent the highest number of workers, with waiters (138,300 workers) and kitchenhands (137,800 workers) being the largest job role groups.

Nearly 40,000 workers were in conference and event organiser job roles and, within Tourism and Travel, 23,800 workers were in tourism and travel adviser roles.

Figure 4: Employment levels for selected ANZSCO occupations in Tourism, Travel and Hospitality - May 2018

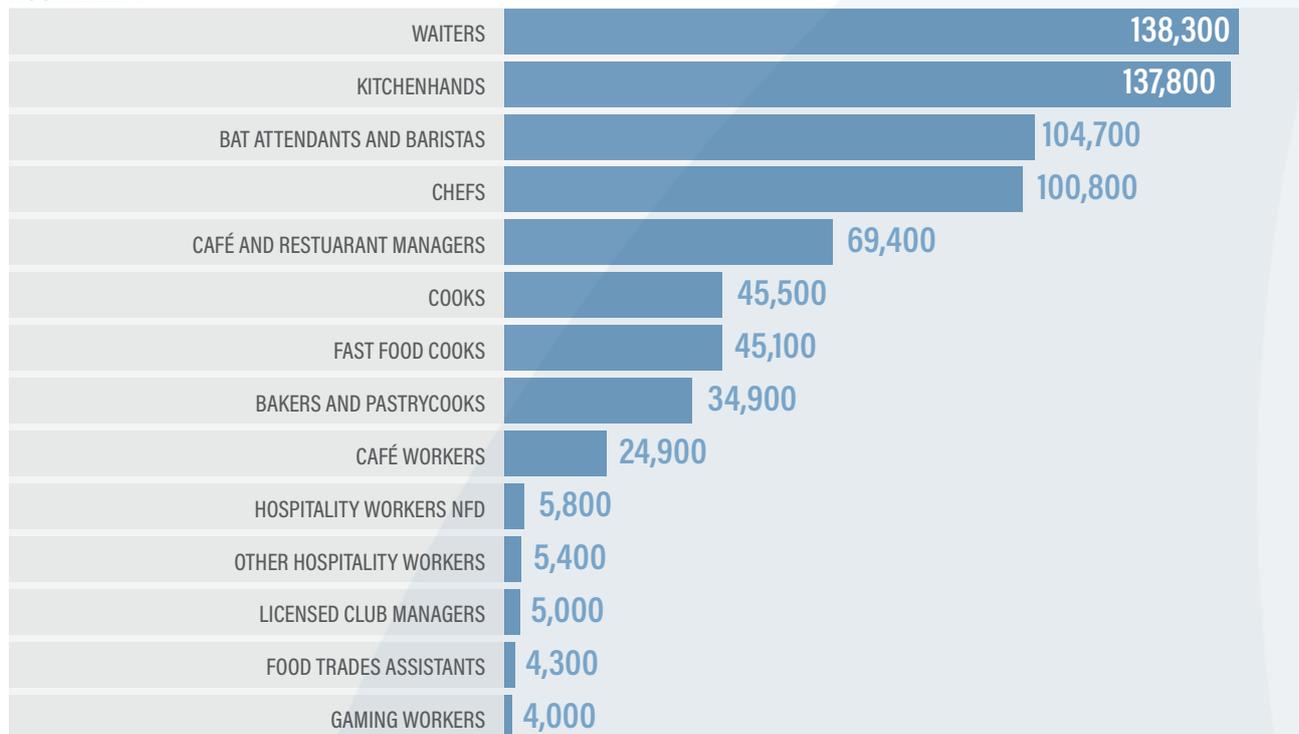
TOURISM AND TRAVEL



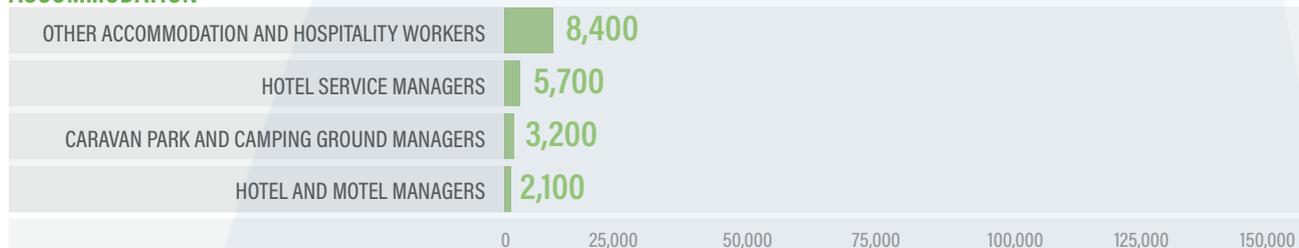
EVENTS



HOSPITALITY



ACCOMMODATION



Source: Department of Jobs and Small Business (2018) Various occupation roles, accessed 17 December 2018

The key traits of some of the most popular job roles across the sectors are outlined in Table 4.

Table 4: Workforce traits of selected occupations supported by the Tourism, Travel and Hospitality Training Package (2019)

Traits	Waiters	Kitchenhands	Tourism and Travel Advisers	Conference and Event Organisers	Hotel Service Managers
AVERAGE AGE (national average 40 years)	22 YEARS	24 YEARS	37 YEARS	35 YEARS	35 YEARS
GENDER - PERCENTAGE FEMALE (national average 46.7%)	76%	54.3%	79.1%	72.9%	71.2%
FULL-TIME EMPLOYMENT (national average 68.4%)	175%	21.1%	77.5%	70.4%	67.3%
LOCATION	NSW - 27.0% VIC - 29.1% QLD - 19.7% SA - 7.8% WA - 10.2% TAS - 3.0% NT - 0.6% ACT - 2.6%	NSW - 26.7% VIC - 24.8% QLD - 23.4% SA - 6.8% WA - 12.4% TAS - 2.9% NT - 1.3% ACT - 1.6%	NSW - 31.3% VIC - 23.7% QLD - 21.9% SA - 6.9% WA - 11.1% TAS - 2.8% NT - 0.5% ACT - 1.9%	NSW - 36.9% VIC - 33.1% QLD - 13.7% SA - 5.3% WA - 6.4% TAS - 1.2% NT - 1.2% ACT - 2.3%	NSW - 30.9% VIC - 30.0% QLD - 16.3% SA - 5.0% WA - 11.6% TAS - 1.3% NT - 1.0% ACT - 3.9%

Source: Department of Jobs and Small Business - Job Outlook, various ANZSCO, accessed 14 January 2019.

All sectors are forecast to experience strong growth in the workforce over the next five years, with Accommodation and Food Services expected to grow by 9.1%, equivalent to 81,400 jobs by May 2023. Forecasts available via other sources show that:

- Employment in the Exhibition and Conference Centres sector is expected to reach 58,940 in 2022-23 (equivalent to an increase of 6% from 2017-18 or 3,720 jobs) (IBIS World)⁶²
- The Tourism workforce is forecast to have almost 682,000 workers in 2022-23 (equivalent to an increase of 11% or 70,036 jobs) (IBIS World).⁶³

The majority of job roles outlined earlier are also expected to note continual job increases over the next five years as shown in Figure 5. Demand for hospitality jobs will be the

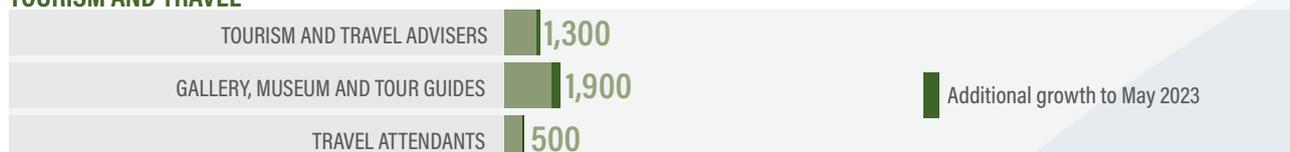
strongest, with employment for waiters and kitchenhands expected to grow by 21,800 and 16,100 workers respectively (equivalent to 15.8% and 11.7%). Chefs will also be high in demand, with employment forecast to grow by 16,800 workers to reach 117,500 (a rise of 16.7%).

Key growth forecast across other sector job roles include:

- Conference and event organisers, who are forecast to increase by 5,000 to reach a workforce of 44,900 (a rise of 12.6%) by 2023
- Gallery, museum and tour guides, forecast to increase by 1,900 to reach a workforce of 11,600 (a rise of 19.1%) by 2023.

Figure 5: Employment levels and growth for selected ANZSCO occupations in Tourism, Travel and Hospitality - May 2018 to May 2023

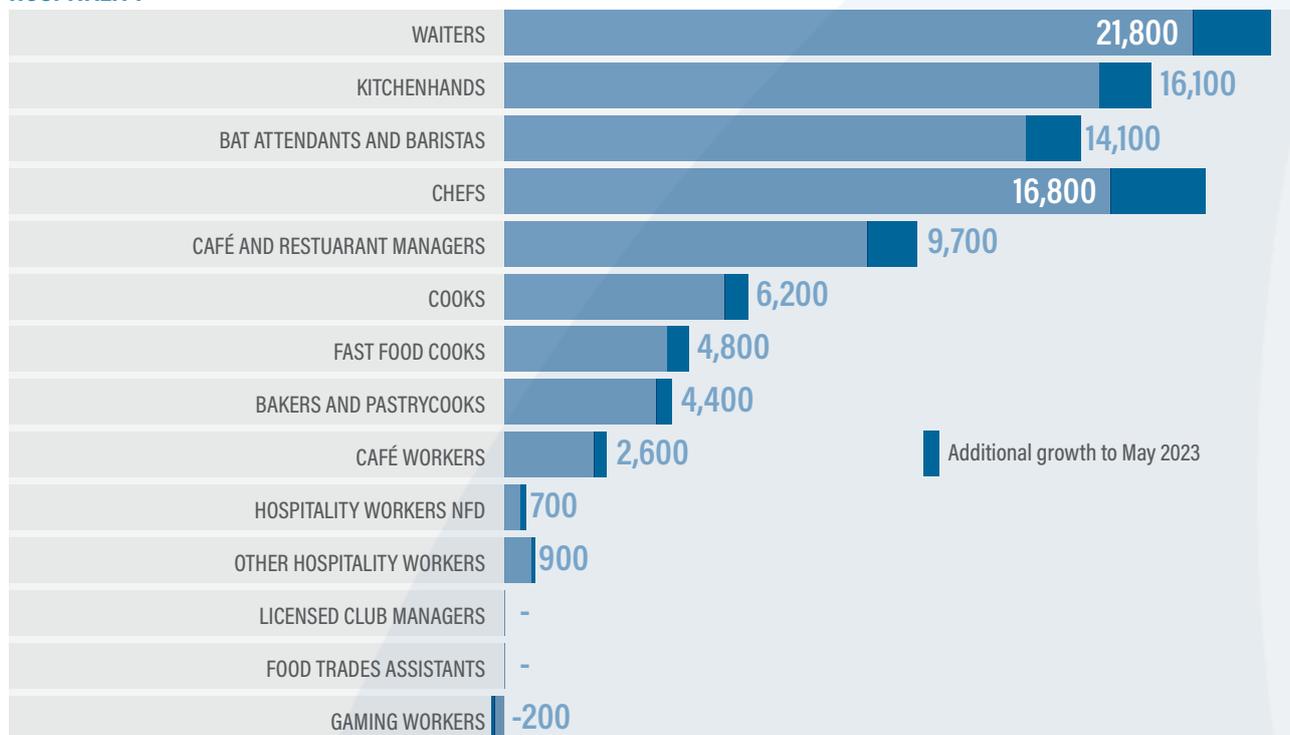
TOURISM AND TRAVEL



EVENTS



HOSPITALITY



ACCOMMODATION



Source: Department of Jobs and Small Business - Job Outlook, various ANZSCO, accessed 14 January 2019



Future Skills

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

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

(AI), globalisation, an ageing population, and shifts in workforce demographics and industry (i.e. transition from manufacturing and production to a largely service-based economy)⁶⁴ are just some of the ongoing trends driving change.

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



TEAMWORK AND
COMMUNICATION



RESILIENCE, STRESS
TOLERANCE AND
FLEXIBILITY



PROBLEM
SOLVING



SELF
MANAGEMENT

These results are in line with wider studies, including the World Economic Forum's *Future of Jobs Survey 2018* which indicates that the top skills in the highest demand in 2022 will include **analytical thinking** and **innovation, creativity, originality** and **initiative, critical thinking, complex problem-solving, leadership** and **emotional intelligence**.⁶⁵

The VET system plays a pivotal role in supporting employers and employees to adapt to technologies and changes in the workplace. Its role in skilling the workforce with current and emerging skills in demand will only grow more strongly in the future as it continues to support individuals entering the workplace or transitioning into different roles.⁶⁶

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

Key Generic Skills – Ranked in Order of Importance

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



Australia's Coral Coast

A.3 Key Drivers for Change and Proposed Responses Overview

Key Drivers

Significant employment growth is forecast across all areas of the Tourism, Travel and Hospitality sectors. Thousands of jobs will need to be filled over the next five years and the Training Package as well as the VET sector overall have an important role in supporting the sectors in accessing skilled workers to fill vacancies. Some examples of forecast employment growth by 2023 include:⁶⁷

- Waiters – an additional 21,800 workers will be needed
- Kitchenhands – an additional 16,100 workers
- Chefs – an additional 16,800 workers
- Gallery, Museum and Tour Guides – an additional 1,900 workers
- Tourism and Travel Advisers – an additional 1,300 workers
- Conference and Event Organisers – an additional 5,000 workers
- Hotel/Accommodation Managers – an additional 800 workers.

Recent changes in legislation regarding 457 visas have added further pressures to employers in accessing sufficient workers for their businesses. Skills training for the local population has therefore never been more critical than it is at present.

Employers have voiced that while they are not able to fill job roles due to a lack of applicants, the skills and

knowledge-base of applicants and entrants to the sectors are also lacking in key areas. These include communication, teamwork, problem solving, business skills, and online and social media, as well as general product and service content, especially in relation to areas of high demand involving cultural tourism experiences.

Proposed Responses

The VET sector is the primary supplier of workers to these sectors. Industry therefore welcomes a review of the relevant Training Package Products and proposed qualification pathways to ensure they are current with industry practices, and to address the issues in the sector regarding career progression and retention.

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

Tourism

- SIT10116 Certificate I in Tourism (Australian Indigenous Culture)
- SIT20116 Certificate II in Tourism
- SIT30116 Certificate III in Tourism
- SIT40116 Certificate IV in Travel and Tourism*
- SIT50116 Diploma of Travel and Tourism Management
- SIT60116 Advanced Diploma of Travel and Tourism Management
- SIT30316 Certificate III in Guiding
- SIT40216 Certificate IV in Guiding

*As part of the update of the Travel qualifications, it is intended to separate the Certificate IV in Travel and Tourism into two separate qualifications, so this qualification will become the Certificate IV in Tourism.

Travel

- SIT30216 Certificate III in Travel

The development of a new qualification in line with the update taking place of the Certificate IV in Travel and Tourism (outlined above) is proposed:

- Certificate IV in Travel

Hospitality

- SIT10216 Certificate I in Hospitality
- SIT20316 Certificate II in Hospitality
- SIT30616 Certificate III in Hospitality
- SIT30716 Certificate III in Hospitality (Restaurant Front of House)
- SIT40416 Certificate IV in Hospitality
- SIT50416 Diploma of Hospitality Management
- SIT60316 Advanced Diploma of Hospitality Management

Accommodation (holiday parks and resorts)

- SIT20216 Certificate II in Holiday Parks and Resorts
- SIT30416 Certificate III in Holiday Parks and Resorts
- SIT40316 Certificate IV in Holiday Parks and Resorts
- SIT50216 Diploma of Holiday Park and Resort Management

Please note that a Case for Change proposing an update of the qualifications and their related Units of Competency and skills sets supporting the Events and Exhibition sector was submitted to the Australian Industry and Skills Committee (AISC) for consideration in March 2019.

In addition, a project is underway to update the suite of Cookery qualifications, including Commercial Cookery, Asian Cookery, Patisserie and Catering Operations qualifications, as well as the Unit of Competency and skill sets related to the Responsible Service of Alcohol (RSA).

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
Employers (i.e. businesses, including restaurants and cafés, hotels, travel agencies, tour operators, etc.)	<ul style="list-style-type: none"> • Competitiveness in the marketplace (domestic and international) will be diminished if businesses are not supported by suitably skilled staff that can enhance and support innovation in Tourism, Travel, Hospitality and Accommodation to meet growing customer expectations. • Competitiveness will be further affected as businesses will be unable to access a sufficient pool of skilled workers to fill vacancies if qualification pathways are not addressed to better attract individuals to the sectors. • Staff turnover may be triggered if a lack of career progression opportunities are not made available through the VET system to support employers in establishing roles internally. • Cost implications of no change include employers either having to rely on costly 'outsourced' resources to fill gaps and/or stay stagnant in terms of their business offerings despite growing demand for services.
Employees	<ul style="list-style-type: none"> • Staff will lack the core skills regarding communication, teamwork, product and service knowledge (i.e. cultural tourism) which will be important for supporting their progression to higher-level positions. • Staff will receive poor or inadequate training (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.
Students	<ul style="list-style-type: none"> • Students will graduate with insufficient skills to meet employers' expectations regarding Tourism, Travel, Hospitality and Accommodation services, thereby reducing their employability.
Training Providers	<ul style="list-style-type: none"> • Training offered will not match industry needs and the quality and reputation of RTOs' course delivery will therefore be compromised.

A.4 Consultation Undertaken

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

- All Tourism, Travel and Hospitality Industry Reference Committee (IRC) members 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.
- Networks of the Tourism, Travel and Hospitality IRC members
- A national online survey (2019 Future Skills Survey) was distributed via the SkillsIQ database between November 2018 and January 2019 which sought to identify top skills needs and priority industry issues
- Public consultation on the draft Industry Skills Forecast took place in early 2019 and notifications of this were distributed by email to over 17,000 stakeholders registered in SkillsIQ's database network
- The Industry Skills Forecast, including the Proposed Schedule of Work – promoted to stakeholders and made available via SkillsIQ's website.

B. Proposed Schedule of Work

2019–20

The four projects proposed (i.e. Projects 1 to 4) for 2019–20 represent:

- 20 qualifications
- 21 skills sets
- 58 Units of Competency.

Due to the cross-sectoral nature of most of the SIT Units of Competency, they cannot be allocated to specific projects. The intention is therefore to conduct the projects simultaneously to ensure that reviews and updates are inclusive of all relevant sectors and that efforts are collaborative in order to avoid duplication and stakeholder fatigue.

1. TOURISM

YEAR	PROJECT DESCRIPTOR
2019–20	<p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to job roles in the Tourism sector:</p> <ul style="list-style-type: none"> • SIT10116 Certificate I in Tourism (Australian Indigenous Culture) • SIT20116 Certificate II in Tourism • SIT30116 Certificate III in Tourism • SIT40116 Certificate IV in Travel and Tourism* • SIT50116 Diploma of Travel and Tourism Management • SIT60116 Advanced Diploma of Travel and Tourism Management • SIT30316 Certificate III in Guiding • SIT40216 Certificate IV in Guiding <p>*As part of the update of the travel qualifications, it is intended to separate the <i>Certificate IV in Travel and Tourism</i> into two separate qualifications, so this qualification will become the <i>Certificate IV in Tourism</i>.</p>

2. TRAVEL

YEAR	PROJECT DESCRIPTOR
2019–20	<p>The IRC proposes to update the following qualification and any associated skill sets and Units of Competency relating to job roles in the Travel sector:</p> <ul style="list-style-type: none"> • SIT30216 Certificate III in Travel <p>It proposes to develop a new qualification in line with the review that takes place of the <i>Certificate IV in Travel and Tourism</i>, as outlined above:</p> <ul style="list-style-type: none"> • Certificate IV in Travel

3. HOSPITALITY

YEAR	PROJECT DESCRIPTOR
2019–20	<p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to job roles in the Hospitality sector:</p> <ul style="list-style-type: none"> • SIT10216 Certificate I in Hospitality • SIT20316 Certificate II in Hospitality • SIT30616 Certificate III in Hospitality • SIT30716 Certificate III in Hospitality (Restaurant Front of House) • SIT40416 Certificate IV in Hospitality • SIT50416 Diploma of Hospitality Management • SIT60316 Advanced Diploma of Hospitality Management

4. ACCOMMODATION (HOLIDAY PARKS AND RESORTS)

YEAR	PROJECT DESCRIPTOR
2019-20	<p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to job roles in the Accommodation sector:</p> <ul style="list-style-type: none">• SIT20216 Certificate II in Holiday Parks and Resorts• SIT30416 Certificate III in Holiday Parks and Resorts• SIT40316 Certificate IV in Holiday Parks and Resorts• SIT50216 Diploma of Holiday Park and Resort Management

2020-21

YEAR	PROJECT TITLE AND DESCRIPTOR
2020-21	None specified

C. 2019-20 Project Details

PROJECT 1 – TOURISM

<p>Description:</p>	<p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to job roles in the Tourism sector:</p> <ul style="list-style-type: none"> • SIT10116 Certificate I in Tourism (Australian Indigenous Culture) • SIT20116 Certificate II in Tourism • SIT30116 Certificate III in Tourism • SIT40116 Certificate IV in Travel and Tourism* • SIT50116 Diploma of Travel and Tourism Management • SIT60116 Advanced Diploma of Travel and Tourism Management • SIT30316 Certificate III in Guiding • SIT40216 Certificate IV in Guiding <p>*As part of the update of the Travel qualifications, it is intended to separate the <i>Certificate IV in Travel and Tourism</i> into two separate qualifications, so this qualification will become the <i>Certificate IV in Tourism</i>.</p>
<p>Rationale:</p>	<ul style="list-style-type: none"> • The Tourism industry is experiencing significant skilled workforce shortages, with estimates showing that there will be a shortage of 30,000 additional skilled workers in the Tourism sector by 2020 if policy and/or training practices do not change. • Key skills and knowledge gaps voiced by industry as a priority for development in the future workforce are: communication, teamwork, self-management, resilience and business/commercial skills as well as product and service knowledge. For example, demand for cultural tourism, particularly that related to learning about Aboriginal beliefs and connections to the land ('country') is growing, and workforce skills development is essential to ensure Australia can provide an authentic experience to visitors. • The current structure and qualification pathway in Tourism is unsuitable: <ul style="list-style-type: none"> - The sector does not have a broad entry-level qualification to encourage new entrants to the sector. The current entry-level qualification (Certificate I) is focused on Australian Indigenous Culture and restricted to specialist job roles requiring storytelling and tour guiding of Indigenous sites and culture. - Tourism involves much more than just providing tours and guides. An entry-level qualification therefore needs to provide a foundation of learning about the industry's ecosystem, including operating environments, legislation and regulations. - Cultural tourism, specifically Australian Indigenous Culture, needs to be a specialism available across all levels of Tourism qualifications. The IRC has therefore established a Cultural Tourism Technical Advisory Committee (TAC) to urgently review this issue. - Tourism is a distinct sector from Travel, and so too are the job roles and functions across each of the two sectors. The <i>Certificate IV in Travel and Tourism</i> therefore needs to be split into two to reflect this – <i>Certificate IV in Tourism</i> and <i>Certificate IV in Travel</i> – because the job roles in each sector are significantly different. Travel reflects primarily Travel Agents and Consultants (i.e. sales) whereas Tourism focuses on Tour Operators, Visitor Centre staff and other roles involved in delivering experiences and information (i.e. services). Industry has indicated that a single qualification is not suitable to cover the core skill needs of each sector. • Business operations have evolved significantly in line with technological developments and the listed Training Package Products need to be thoroughly reviewed so they continue to reflect current industry practices. This includes the facilitation of access to online and social media skills training (i.e. <i>Cross-sector Online and Social Media Training Package Products</i>) to meet growing consumer demand. • Assessment methods and criteria of outcomes do not always match the level of skill training. For example, Northern Territory employers have indicated that the Certificate I is sometimes 'over-assessed' for the basic-level outcome it intends to achieve. For example, preliminary 2017 completion data for the <i>Certificate I in Tourism (Australian Indigenous Culture)</i> shows there have been only seven completions reported, and only 12 registered for 2016. • An update to these Tourism Training Package Products is expected to better streamline the qualification pathways and create a more appealing skills training offering to trigger higher enrolments, especially in the entry-level qualification which only attracted 102 enrolments in 2017. • These qualifications were last updated in 2015 (endorsed in 2016) in order to transition them to the Standards for Training Packages.

PROJECT 1 - TOURISM

Rationale:	<p>In summary, key changes proposed include:</p> <ul style="list-style-type: none"> → Update of <i>Certificate I in Tourism (Australian Indigenous Culture)</i> to <i>Certificate I in Tourism</i> to cover a broader range of entry-level skills and create pathways for new entrants to the sector. → Inclusion of Cultural Tourism, specifically Australian Indigenous Culture, across all levels of tourism qualifications. → Splitting the <i>Certificate IV in Travel and Tourism</i> into a <i>Certificate IV in Tourism</i> and a <i>Certificate IV in Travel</i> (in conjunction with Project 2). → A thorough update of content, language, and terminology used across all the Training Package Products (e.g. Units of Competency and skill sets).
Ministers' Priorities Addressed:	<p>This project is an opportunity to support the Council of Australian Governments (COAG) Industry and Skills Council (CISC) to specifically address the following priorities:</p> <ul style="list-style-type: none"> • Obsolete and duplicate qualifications to be removed from the system, i.e. the <i>Certificate I in Tourism (Australian Indigenous Culture)</i>. • More information about industry's expectations of training delivery to be made available to training providers to improve their delivery and to consumers to enable more informed choices. • The training system to better support individuals to move more easily between related occupations in Tourism and its related sectors. • The improved efficiency of the training system through Units that can be owned and used by multiple industry sectors. • The fostering of a greater recognition of skill sets through the review of those specific to Tourism.
Consultation Plan:	<p>National peak bodies, key industry players, as well as broader stakeholders across the sector (e.g. employers) will be consulted throughout the course of the project. National industry consultation will also be conducted via face-to-face workshops, webinars, surveys and one-on-one interviews, and there will be opportunities for all interested parties to provide comments online via the SkillsIQ Online Feedback Forum.</p>
Scope of Project Overview - Timing:	<p>Estimated duration: 12-15 months A detailed project plan outlining key dates will be developed and aligned to the Activity Order date once known.</p>

Summary of components:

- Training Package/s to be Developed/Updated: **SIT Tourism, Travel and Hospitality Training Package**
- Qualification/s to be Developed/Updated: **Eight (8)**
- Skill set/s to be Developed/Updated: **Eleven (11)**
 - SITSS00034 Business Management
 - SITSS00035 Customer Service Management
 - SITSS00036 Customer Service
 - SITSS00037 Essential Business Skills for a Franchisee
 - SITSS00038 Governance for Board Members
 - SITSS00040 Product Development for International Visitor Markets
 - SITSS00041 Product Sales for International Visitor Markets
 - SITSS00042 Service for International Visitors
 - SITSS00043 Understanding Financial Concepts for Budgeting
 - SITSS00062 Online Engagement for Small Business
 - SITSS00061 Visitor Information Services

PROJECT 2 – TRAVEL

<p>Description:</p>	<p>The IRC proposes to update the following qualification and any associated skill sets and Units of Competency relating to job roles in the Travel sector:</p> <ul style="list-style-type: none"> • SIT30216 Certificate III in Travel <p>It proposes to develop a new qualification in line with the update that takes place of the <i>Certificate IV in Travel and Tourism</i> and outlined above:</p> <ul style="list-style-type: none"> • Certificate IV in Travel
<p>Rationale:</p>	<p>Forecast employment growth for the Travel sector is strong, and employment in Tourism and Travel Adviser roles alone is expected to require an additional 1,300 workers by 2023.</p> <p>The current structure and composition of Units of Competency (i.e. Core Units and Elective Units) is not suitable, and there are some clear opportunities to maximise the efficiency, effectiveness and relevancy of the Training Package Product offering to the Travel sector. One example of a proposed change involves the requirement to consolidate a number of Units of Competency in the <i>Certificate III in Travel</i> to better reflect current and actual industry practices in the workplace. For example, the following four Units are predominantly covered and practised in an integrated manner as they represent the actual steps required to be taken by an employee in booking a travel/holiday request on behalf of a customer (i.e. access information, quote, reserve and print/prepare documentation): SITTTSL002 Access and interpret product information, SITTTSL006 Prepare quotations, SITTTSL008 Book supplier products and services, and SITTELO09 Process travel-related documentation.</p> <p>Consolidating the four Units into one will not only better reflect industry practices and employer needs but will also contribute towards improving the efficiency of Training Package Products without losing any initial skill or knowledge component of those Units.</p> <p>A distinct Certificate IV qualification is required for the Travel sector because the current <i>Certificate IV in Travel and Tourism</i> does not cover any knowledge elements which are relevant or applicable in the travel sector workplace. Industry has voiced training needs in skill areas related to supervisory and leadership positions. Succession planning is increasingly more vital for employers given the growing trends within an ageing workforce. Employers, especially small and medium-sized enterprises, are therefore looking to ensure that the livelihood of their businesses will continue despite staff changes. Access to training and skilled workers that can take on leadership roles in an organisation is therefore critical.</p> <p>These qualifications were last updated in 2015 (and endorsed in 2016) in order to transition them to the Standards for Training Packages.</p> <p>In summary, key changes proposed include:</p> <ul style="list-style-type: none"> → A thorough update of content, language, and terminology used across all the Training Package Products (e.g. Units of Competency and skill sets), and the identification of opportunities to consolidate Units of Competency and to include additional skills and knowledge areas (i.e. Cross-sector units). → The development of a new <i>Certificate IV in Travel</i>.
<p>Ministers' Priorities Addressed:</p>	<p>This project is an opportunity to support the Council of Australian Governments (COAG) Industry and Skills Council (CISC) to specifically address the following priorities:</p> <ul style="list-style-type: none"> • Obsolete and duplicate qualifications to be removed from the system. • More information about industry's expectations of training delivery to be made available to training providers to improve their delivery and to consumers to enable more informed choices. • The training system to better support individuals to move more easily between related occupations in Travel and related sectors. • The improved efficiency of the training system through Units that can be owned and used by multiple industry sectors. • The fostering of greater recognition of skill sets through the review of those specific to travel.
<p>Consultation Plan:</p>	<p>National peak bodies, key industry players, as well as broader stakeholders across the sector (e.g. employers) will be consulted throughout the course of the project. National industry consultation will also be conducted via face-to-face workshops, webinars, surveys and one-on-one interviews, and there will be opportunities for all interested parties to provide comments online via SkillsIQ's Online Feedback Forum.</p>
<p>Scope of Project Overview - Timing:</p>	<p>Estimated duration: 12-15 months A detailed project plan outlining key dates will be developed and aligned to the Activity Order date once known.</p>
<p>Summary of components:</p> <ul style="list-style-type: none"> • Training Package/s to be Developed/Updated: SIT Tourism, Travel and Hospitality Training Package • Qualification/s to be Developed/Updated: Two (2) • Skill set/s to be Developed/Updated: One (1) SITSS00059 Airfare Construction 	

PROJECT 3 – HOSPITALITY

<p>Description:</p>	<p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to job roles in the Hospitality sector:</p> <ul style="list-style-type: none"> • SIT10216 Certificate I in Hospitality • SIT20316 Certificate II in Hospitality • SIT30616 Certificate III in Hospitality • SIT30716 Certificate III in Hospitality (Restaurant Front of House) • SIT40416 Certificate IV in Hospitality • SIT50416 Diploma of Hospitality Management • SIT60316 Advanced Diploma of Hospitality Management
<p>Rationale:</p>	<p>The Food and Beverage Services sector is one of the highest employing sectors in Australia, with a registered workforce of over three-quarters of a million workers (777,300 in May 2018). The workforce size, however, goes beyond this volume, as other sectors that contribute to Hospitality include clubs (which the 2015 National Club Census shows in one year employed 130,000 workers), and catering services (with nearly 40,000 workers (2018–19) according to recent IBISWorld Industry Reports). It is also one of the sectors forecast to experience very strong growth over the next five years, with an additional 79,100 jobs required to be filled by 2023 (an increase of 10.2%).</p> <p>Within the Food and Beverages Services sector, cafés, restaurants and takeaway food services are expected to grow significantly, the equivalent of an increase of 74,700 workers by 2023 (+11.9%). Occupations across the sector will be in high demand, with employment for waiters and kitchenhands expected to grow by 21,800 and 16,100 workers respectively (equivalent to 15.8% and 11.7% growth). Chefs will also be high in demand, with employment forecast to grow by 16,800 workers to reach 117,500 (a rise of 16.7%) by 2023. These job roles are in high demand across all Hospitality employers, ranging from cafés and restaurants, to clubs and catering operations.</p> <p>Today, demand for employment is just as strong as that forecast in the coming years, but employers are experiencing severe difficulties in filling vacancies and finding suitably skilled staff for their businesses. Skills shortages are a large challenge in the sector and so it has never been more important than now to review the Training Package Products in order to support the sector to ensure industry can access a sufficiently skilled workforce. Key skill areas that need to be considered include business acumen, communication, data analytics and online and social media, as the Hospitality sector has evolved significantly in line with technology trends (both at a consumer and business-operational level). Skills training needs to reflect employer requirements to meet consumer demand regarding customer service, engagement (i.e. online platforms), preferences and behaviours. It also needs to support employers to reach their potential and continue to contribute strongly to Australia's economic growth and position it as one of the world's leading countries in terms of Hospitality service. The current Training Package is not equipped to cover these skills areas adequately and needs to be updated to ensure cross-sectoral opportunities for development are not missed.</p> <p>This work would also take on board the recommendations of the Food Safety TAC in 2018 to update Units of Competency and skill sets related to food safety.</p> <p>These qualifications were last updated in 2015 (and endorsed in 2016) in order to transition them to the Standards for Training Packages.</p> <p>In summary, key changes proposed include:</p> <ul style="list-style-type: none"> → A thorough update of content, language, and terminology used across all the Training Package Products (e.g. Units of Competency and skill sets). → A thorough review of career pathways and progression opportunities supported by the Training Package. → Update of Units of Competency and skill sets related to food safety as recommended by (and taking into account the findings of) the Food Safety TAC in 2018.

Ministers' Priorities Addressed:	<p>This project is an opportunity to support the Council of Australian Governments (COAG) Industry and Skills Council (CISC) to specifically address the following priorities:</p> <ul style="list-style-type: none"> • Obsolete and duplicate qualifications to be removed from the system. • More information about industry's expectations of training delivery to be made available to training providers to improve their delivery and to consumers to enable more informed choices. • The training system to better support individuals to move more easily between related occupations in Hospitality and related sectors. • The improved efficiency of the training system through Units that can be owned and used by multiple industry sectors. • The fostering of greater recognition of skill sets through the review of those specific to Hospitality.
Consultation Plan:	<p>National peak bodies, key industry players, as well as broader stakeholders across the sector (e.g. employers) will be consulted throughout the course of the project. National industry consultation will also be conducted via face-to-face workshops, webinars, surveys and one-on-one interviews, and there will be opportunities for all interested parties to provide comments online via SkillsIQ's Online Feedback Forum.</p>
Scope of Project Overview - Timing:	<p>Estimated duration: 12-15 months A detailed project plan outlining key dates will be developed and aligned to the Activity Order date once known.</p>

Summary of components:

- Training Package/s to be Developed/Updated: **SIT Tourism, Travel and Hospitality Training Package**
- Qualification/s to be Developed/Updated: **Seven (7)**
- Skill set/s to be Developed/Updated: **Eleven (11)**
 - SITSS00039 Mentoring and Supervision
 - SITSS00046 Beverage Advice
 - SITSS00047 Essential Business Skills for a Restaurant Manager
 - SITSS00048 Espresso Machine Operation
 - SITSS00049 Food Advice
 - SITSS00050 Food Handling
 - SITSS00051 Food Safety Supervision
 - SITSS00052 Hospitality Compliance
 - SITSS00053 Housekeeping Service
 - SITSS00056 Sommelier
 - SITSS00058 Environmentally Sustainable Hospitality and Restaurant Operations

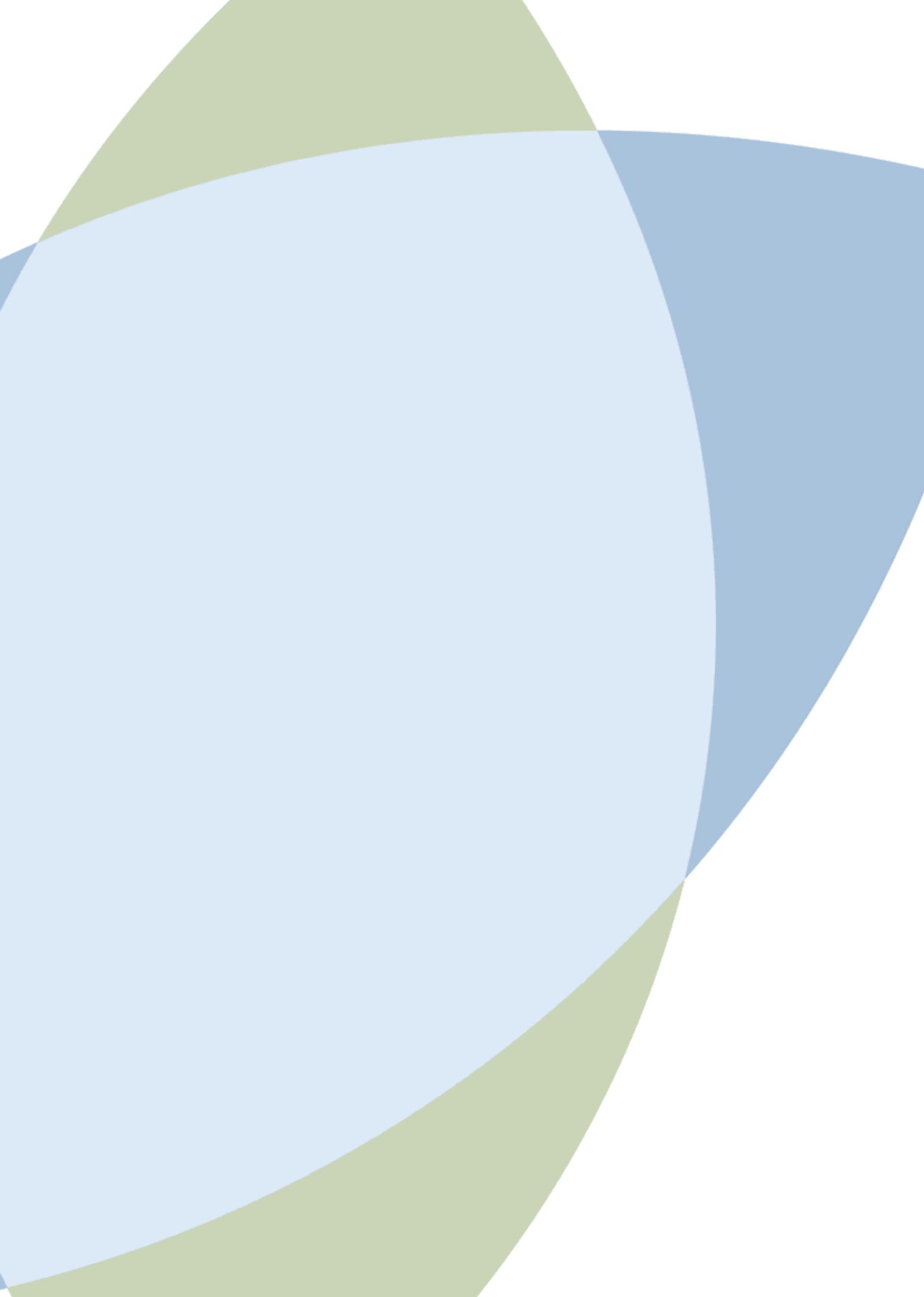
PROJECT 4 – ACCOMMODATION (HOLIDAY PARKS AND RESORTS)

Description:	<p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to job roles in the Accommodation sector:</p> <ul style="list-style-type: none"> • SIT20216 Certificate II in Holiday Parks and Resorts • SIT30416 Certificate III in Holiday Parks and Resorts • SIT40316 Certificate IV in Holiday Parks and Resorts • SIT50216 Diploma of Holiday Park and Resort Management.
Rationale:	<p>Demand for accommodation across the country is growing significantly and in 2017–18, international and domestic visitors spent a total of 271 million and 368.2 million nights respectively away from their residential home for travel purposes. Consumer preferences for accommodation types have been shifting over time, with growing demand noted for outdoor and caravan parks and camping ground stays. The ‘sharing economy’ and the rise in bookings for serviced apartments made available through online and social media platforms has meant that other accommodation providers have had to adjust business practices and ensure customer preferences regarding online behaviour are met.</p> <p>Demand for accommodation is very much associated with trends in the sectors discussed earlier for Projects 1 to 3 (i.e. Tourism, Travel and Hospitality) as well as other sectors served by the Tourism, Travel and Hospitality Training Package, including Events and Exhibitions. Growth in these sectors will have a knock-on effect on demand for accommodation, and an additional 800 managerial roles across the Accommodation sector are forecast to be needed by 2023.</p> <p>The sector is experiencing skills shortages as outlined earlier and it is important to review the relevant Training Package Products to ensure they are updated and ‘future proofed’ so that a skilled workforce is available to employers.</p> <p>Many of the Units of Competency in the SIT Tourism, Travel and Hospitality Training Package are cross-sectoral in nature, i.e. they are used in qualifications across all four sectors: Tourism, Travel, Hospitality and Accommodation. As a result, it is recommended that the Accommodation Training Package Products be reviewed simultaneously to the reviews of the other SIT Training Package Products to ensure that updates are inclusive of all relevant sectors and that efforts are collaborative and avoid a duplication of effort. These qualifications were last updated in 2015 (and endorsed in 2016) in order to transition them to the Standards for Training Packages.</p> <p>In summary, key changes proposed include:</p> <ul style="list-style-type: none"> → A thorough update of content, language and terminology used across all the Training Package Products (e.g. Units of Competency and skill sets). → A thorough review of career pathways and progression opportunities supported by the Training Package.
Ministers’ Priorities Addressed:	<p>This project is an opportunity to support the Council of Australian Governments (COAG) Industry and Skills Council (CISC) to specifically address the following priorities:</p> <ul style="list-style-type: none"> • Obsolete and duplicate qualifications to be removed from the system. • More information about industry’s expectations of training delivery to be made available to training providers to improve their delivery and to consumers to enable more informed choices. • The training system to better support individuals to move more easily between related occupations in Accommodation and related sectors. • The improved efficiency of the training system through Units that can be owned and used by multiple industry sectors. • The fostering of greater recognition of skill sets through the review of those specific to Accommodation.
Consultation Plan:	<p>National peak bodies, key industry players, as well as broader stakeholders across the sector (e.g. employers) will be consulted throughout the course of the project. National industry consultation will also be conducted via face-to-face workshops, webinars, surveys and one-on-one interviews, and there will be opportunities for all interested parties to provide comments online via SkillsIQ’s Online Feedback Forum.</p>
Scope of Project Overview - Timing:	<p>Estimated duration: 12-15 months A detailed project plan outlining key dates will be developed and aligned to the Activity Order date once known.</p>
<p>Summary of components:</p> <ul style="list-style-type: none"> • Training Package/s to be Developed/Updated: SIT Tourism, Travel and Hospitality Training Package • Qualification/s to be Developed/Updated: Four (4) • Skill set/s to be Developed/Updated: One (1) SITSS00060 Grounds Keeping and Maintenance 	

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