



TOURISM INDUSTRY
WORKFORCE DEVELOPMENT
STRATEGY 2007-2012

DIRECTIONS PAPER

Recommendations
to the Minister's
Tourism Round Table



Government
of South Australia

South Australian
Tourism Commission

This Strategy recognises that tourism is a complex, fragmented and spatially diverse industry that to date, in terms of workforce planning, operates in a relative information vacuum.

This makes it extremely difficult to plan for desirable workforce outcomes. Therefore, this paper only attempts to commence the process of understanding and responding to the crucial issue of workforce planning for the industry.

As the mechanisms recommended in this paper are established it is expected that the industry's capacity and capabilities will evolve and grow, putting it in a better position to face the significant challenges ahead.

EXECUTIVE SUMMARY

THE SOUTH AUSTRALIAN STRATEGIC PLAN'S TOURISM TARGET (T1.15) IS TO INCREASE VISITOR EXPENDITURE WITHIN SA FROM \$3.7 BILLION IN 2002 TO \$6.3 BILLION BY 2014. IT AIMS TO ACHIEVE THIS TARGET BY INCREASING VISITOR NUMBERS, LENGTH OF STAY AND YIELD PER VISITOR.

The tourism industry in South Australia comprises of around 4,000 small to medium scale, independent, but inter-related businesses that service the needs of visitors to the State and the regions within it.

This visitor demand includes any people that stay overnight (40kms away from home for up to 12 months) and day-trippers (traveling a round trip of 50kms away from home for over 4 hours). The business services provided to these visitors include hospitality and customer service, which is an integral part of the tourism industry.

It is estimated that the tourism industry currently employs around 34,000 people in South Australia. An increased focus on high-yield visitors with higher expectations of quality will mean that the people who make up the tourism workforce will become more crucial to the industry's growth and prosperity.

In recent years, the tourism industry has proven to be extremely resilient, despite a multitude of shocks and crises. This aside, the challenge for the industry to continue to attract and retain a workforce that will support quality visitor experiences has the potential to test this resilience. Workforce planning will become one of the most significant challenges that the industry will face in the future.

In 2004, the Minister's Tourism Round Table, which was established to connect Government with the tourism industry and its various stakeholders, identified workforce issues as a key industry concern.

In 2003, the Australian Bureau of Statistics estimated there were over 4,000 'tourism-characteristic' businesses within South Australia of which 91% were defined as micro (less than 4 employees) and small businesses (between 5-20 employees). This, along with the spatial fragmentation of businesses throughout the State makes it extremely difficult to deliver effective workforce planning outcomes.

Worker skills shortages in tourism cannot be simply attributed to an inability of the education and training system to prepare people to meet the industry's demand for suitable labour. Labour-force trends, industry and regional structures, business sizes, workplace conditions, the mobility of workers and seasonal factors can all contribute to labour market conditions and imbalances.

The three most significant labour-force trends that will impact on the industry are:

- (1) the baby boomer generation reaching retirement;
- (2) competition for increasingly scarce labour resources from emerging industries; and
- (3) changing labour market attitudes relating to work.

However, for the reasons outlined in this paper, the tourism industry is not in a strong competitive position to address the gap between the industry's workforce requirements and the workforce that will be readily available to it.

It is estimated that the potential South Australian tourism workforce needed by 2015 (based on a constant policy scenario) is likely to be 42,000 persons (i.e. an additional 8,000 people).

More importantly however, the major issue is not just how to attract new people into the workforce to meet expected demand, but how to retain the existing workforce in light of an increasingly competitive labour market.

This Strategy's vision is for an efficient, highly skilled workforce that supports a globally competitive economy and a socially inclusive community *Better Skills. Better Work. Better State: South Australian Workforce Development Strategy*.

The key issues to emerge from discussions with stakeholders include:

- The industry must develop better data sources and improve analysis of tourism workforce trends and implications,
- The industry must have greater awareness of, and links with, workforce planning stakeholders and existing programs available,
- TAFE, Universities and Registered Training Organisations (RTO) need to move from focus on 'training for business' to 'training within the business' (i.e. flexible on-job, in-time and in-place modular training); and
- The need to develop a case management¹ response initiative that identifies new key tourism projects and their workforce requirements and demands.

The key **critical success factor** for the achievement of this vision within the tourism industry is the need for a tourism industry body that can connect stakeholders and offer business to business support in workforce planning needs.

The SA Tourism Alliance has expressed an interest in fulfilling this role although it has very limited capacity to do so. The Food, Tourism and Hospitality Industry Skills Advisory Council (FTHISAC) have potential access to funding to assist in implementing this plan. Clearly, a strong working relationship is required between a representative industry body, the Food, Tourism and Hospitality Industry Skills Advisory Council, the training and education sector and individual tourism businesses. Establishing the right framework will be a critical action.

The objectives and strategies for ensuring productive tourism workforce outcomes are listed below. Each strategy is accompanied with detailed actions and a detailed implementation schedule, in the body of the report. The priority strategies are shown in underline.

¹ Case management involves the appointment of case managers who work directly with industry in the development and continuing management of workforce development plans adopted by new and existing employers.

OBJECTIVE 1:

INDUSTRY WORKFORCE PLANNING CAPACITY

Ensure a coordinated approach to workforce planning and provide an effective business support network

- Ensure a representative viable industry entity with the professional capacity and capability to identify, articulate and implement workforce planning and development needs of all tourism sectors within the industry.

OBJECTIVE 2:

EDUCATION FOR TOURISM

Deliver education and training programs that will meet the needs of the industry

- Strengthen the secondary school curriculum to provide a realistic understanding and knowledge of the tourism industry
- Establish partnerships to improve industry engagement and recognition at the secondary and tertiary levels.

OBJECTIVE 3:

RECRUITMENT

Position tourism as an employer of choice to targeted sectors of the current and future labour market and promote career opportunities accordingly

- Determine best fit 'segments' within the current and future labour markets and promote to these segments
- Promote the industry experience (skills gained) of students and/or past students and employees to provide a realistic understanding of career and employment opportunities
- Continue to advocate to the Federal Government for legislation that influences the industry's capacity to attract (and retain) employees
- Align the industry with Commonwealth and State employment initiatives to support participation by a broad range of social sectors
- Support the implementation of the Food, Tourism and Hospitality Skills Advisory Council SHIFT.com website proposal.

OBJECTIVE 4:

RETENTION AND PROGRESSION

Develop strategies to improve retention and career pathways within the industry

- Increase the capacity to up-skill when required and recognize prior learning as part of training processes
- Encourage industry sectors to work together to identify job-share and exchange opportunities and develop and recognize competency-based skill sets across locations and businesses
- Undertake career progression modeling across a range of sectors within the tourism industry, including tourism-specific, retail and hospitality.

OBJECTIVE 5:

ENHANCING SKILLS THROUGH TRAINING

Deliver training for continuous improvement in skills for employees and employers consistent with industry needs

Employees

- Continue to encourage and facilitate access to flexible training arrangements within the workplace
- Support new delivery models that effectively meet education and training needs in regional tourism areas
- Support and extend the 'Appetite for Success' program to key occupational areas within the tourism industry.

Employers

- Continue to provide, facilitate and promote a range of networking, training, mentoring and business development information and opportunities specifically to cater for tourism businesses
- Raise tourism businesses' awareness of training and the benefits of integrating flexible employment and workforce planning into business practices
- Strengthen human resource management practices and customer service excellence within the National Tourism Accreditation Program
- Liaise with non-tourism specific organisations to ensure that tourism businesses can capitalize on business development training and mentoring opportunities.
- Conduct a skills audit / training needs analysis on Aboriginal tourism businesses to provide an indication on skills gaps within this sector.

OBJECTIVE 6:

TRACKING AND MONITORING

Improve the capacity of the tourism industry to plan for future workforce needs through relevant research and monitoring

- Improve tourism employment forecasting techniques
- Create an on-going system to track tourism students throughout their careers
- Identify and monitor the key expected skill and labour shortages within the major tourism occupations
- Update strategic tourism plans to reflect the significance of workforce planning by the tourism industry
- Use case management² workforce models to ensure responsiveness to private sector investment in major tourism developments, particularly within regional areas.

The Steering Committee and Working Group have now completed their investigations and consultations and submit this final report to the Minister's Tourism Round Table for consideration and implementation.

The identified priority issue that needs to be seriously addressed is the critical success factor of creating a tourism industry driven workforce development capacity and capability.

² Case management involves the appointment of case managers who work directly with industry in the development and continuing management of workforce development plans adopted by new and existing employers.

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1.0 INTRODUCTION

SOUTH AUSTRALIA'S STRATEGIC PLAN TOURISM TARGET (T1.15) IS TO INCREASE VISITOR EXPENDITURE WITHIN SA FROM \$3.7 BILLION IN 2002 TO \$6.3 BILLION BY 2014. THE TOURISM INDUSTRY AIMS TO ACHIEVE THIS TARGET BY INCREASING VISITOR NUMBERS, LENGTH OF STAY AND YIELD PER VISITOR.

This target and the means of achieving it can only be realized by developing a strong destination brand, which delivers on its promise of providing distinctive and memorable experiences to both domestic and international visitors.

These experiences in turn are delivered by a service-oriented workforce. It is estimated the industry currently employs around 34,000 people³ in South Australia. An increased focus on high-yield visitors with higher expectations of quality will mean that the people who make up the tourism workforce will become more crucial to the industry's growth and prosperity.

This Tourism Industry Workforce Development Strategy has been prepared through an industry-led partnership with government to provide recommendations for a course of action to meet the considerable workforce challenges facing the tourism industry in the foreseeable future.

The Plan has been guided by a Steering Committee comprising representatives from industry and government. Invaluable contributions have been made by a Working Party of twenty-one persons representing industry, education and training sector stakeholders.

Due to the paucity of tourism workforce data, the Plan does not attempt to predict accurately the exact skill types or employment numbers that are required by the industry in the long term. Rather, it seeks to recommend a framework within which emerging workforce development and planning approaches can collectively articulate the needs of industry, create a culture that values skills and collaboratively and efficiently work towards delivering them.

Improving the tourism industry's collective capacity and capability is one of the critical success factors to achieving the tourism industry growth target – as identified in the *SA Strategic Plan – Tourism Implementation Action Plan*. Conversely, effective workforce planning is one of the most essential elements for building industry maturity within tourism.

³ South Australian Tourism Satellite Accounts, Cooperative Research Centre for Sustainable Tourism (preliminary figures)

2.0 STRATEGIC CONTEXT

THE CURRENT AND FUTURE WORKFORCE CHALLENGE IS NOT UNIQUE TO SOUTH AUSTRALIA, OR TO THE TOURISM INDUSTRY. WORKFORCE PLANNING HAS EMERGED AS A KEY ISSUE ACROSS THE BOARD AT BOTH NATIONAL AND STATE LEVELS.

At the July 2006 Council of Australian Governments (COAG) meeting, all governments in Australia set the highest priority on training, creating jobs and providing Australians with job opportunities⁴.

Access Economics has predicted that Australia as a whole will face a potential shortfall of 195,000 workers in the next five years. Nationally, it has been estimated that there is currently a tourism skills shortage of approximately 7,000 positions and a forecast for an additional deficit of up to 15,000 positions per year⁵.

In its April 2005 Progress Report, the South Australian Economic Development Board stated that skills shortages and development were widely acknowledged as the most critical issue facing the overall South Australian economy.

In 2006, the Government released the *Better Skills. Better Work. Better State: South Australian Workforce Development Strategy* in recognition of the need to plan for the considerable workforces challenges that lie ahead for this State (see Section 3).

As far back as 2004, the Minister's Tourism Round Table, which was established to connect Government with the tourism industry and its various stakeholders, identified workforce issues as a key industry concern.

The Round Table made it clear that the tourism industry is experiencing an overall labour and skills shortage, which will ultimately influence the industry's long-term sustainability. Regional areas in particular are experiencing the impacts of these shortages.

This was confirmed as an Australian-wide issue in a 2005 national survey of business members of the Tourism and Transport Forum (TTF). This survey indicated that 75% of tourism businesses are seriously affected by labour shortages and are having trouble filling positions⁶.

In March 2006, a report prepared for the Federal Minister for Tourism, *Investing for our Future*, further confirmed that skills shortages were a fundamental impediment to industry growth and sustainability.

As far as is practicable, this Strategy will aim to align with the evolving broader initiatives and tourism specific initiatives in workforce planning. As this is an evolving process, this strategy will need a dynamic process to act as a catalyst to action and maintain the momentum.

⁴ Department of Industry, Tourism and Resources, January 2007

⁵ National Tourism Investment Strategy, March 2006

⁶ Tourism And Transport Forum Survey, 2005

3.0 SOUTH AUSTRALIAN WORKFORCE DEVELOPMENT STRATEGY

IN 2005, THE STATE GOVERNMENT RELEASED THE PAPER, *A STRATEGY FOR THE DEVELOPMENT OF SOUTH AUSTRALIA'S WORKFORCE TO 2010*.

This Strategy stated that 'the development of a skilled workforce capable of supporting our economy and maintaining high standards of living for all South Australians cannot be left to chance'.

The Strategy's vision for a better future for South Australia's workforce is for an efficient, highly skilled workforce that supports a globally competitive economy and a socially inclusive community. It identified three priorities and ten focal points for action:

- The creation of a **high skill economy**
 - a skilled workforce
 - jobs through business and economic growth
 - high performance work places
 - responsive learning systems
- Access to **quality employment**
 - access to learning and jobs
 - flexibility for workers
 - fair and suitable work
- Shaping our future through **better workforce planning**
 - research excellence
 - better information and planning systems
 - co-ordinated government action.

Notwithstanding the need for co-ordinated government action, the Strategy emphasizes that workforce development is a shared responsibility of government, business, industry, community and educational institutions.

The Strategy also identifies a range of actions under each one of these areas of focus. While these are not outlined here, this Tourism Industry Workforce Strategy has been developed with this broad framework and these directions in mind.



4.0 PROJECT APPROACH

THIS TOURISM WORKFORCE STRATEGY IS BASED ON THE FOLLOWING INVESTIGATIVE METHODOLOGY TO DATE:

- Reviewing relevant data from existing international, national, regional and local research on current and future issues relating to skills and workforce development in the tourism industry and specific sectors (e.g. hospitality);
- Quantitative Research – which included:
 - conducting an on-line SA Tourism Industry Needs Survey utilizing the SATC's Australian Tourism Data-base Warehouse (ATDW) database;
 - conducting a Supply of Tourism Labour and Skills Survey involving an audit of education and training providers linked to the tourism industry⁷.
- Qualitative Research undertaken by an independent party, Vincent Burke Research, comprising in-depth and focused dialogue with industry members;
- Input from a Working Party comprising key industry representatives and education and training providers; and finally
- The preparation of working papers and a draft Strategy discussed and endorsed by the Working and Steering Committee at various key stages.

It should be noted that the quantitative survey work referred to above provided an indicative snapshot of industry workforce needs and issues only and should be confirmed with more detailed ongoing research as recommended in this strategy.

5.0 DEFINING THE TOURISM INDUSTRY

THE TOURISM INDUSTRY IS UNUSUAL AND NOT EASILY DEFINED.

It is an industry comprising of independent, but inter-related businesses that conduct activities directed at satisfying the needs of visitors to the State and regions within it. These demands may come from international, interstate and intrastate visitors.

While tourism does not have tangible 'outputs' in the production sense, it generates income through the provision of services to people who travel to destinations away from home in order to meet their recreational and business needs, to meet other people and to enjoy new experiences.

These services include 'tangible' elements such as transport, accommodation, attractions, events, food and beverage, tours, visitor centres, souvenirs and the 'intangible people' elements including services provided by staff and volunteers, as well as interaction with locals.

These businesses may cater for general tourism needs, or deliver specialist niche-markets activities such as eco-tourism, adventure tourism, cultural tourism, recreation tourism, sports tourism, wine tourism, or events and business events (festivals, conferences, meetings).

In an addition to these services, tourism has a strong need for skills in marketing, research, policy and development. The tourism industry also has an inextricable inter-relationship with the hospitality sector, which comprises hotels, clubs, casinos, restaurants, cafés, and catering.

Unlike most other major economic sectors there is no broad tourism or 'tourism and hospitality' industry defined under the ABS ANZSIC code classifications for data collection. This makes planning for the industry extremely difficult. In many cases, the accommodation, cafés and restaurants sector is used as a proxy for the wider tourism industry.

The difficulty with this is that it does not adequately illustrate the broader profile of the tourism workforce, particularly the jobs that require more specific skill sets such as those linked with marketing, sales, distribution, research, and event management to name a few. To assist in capturing some of the gaps in the basic supply data and reinforcing others, the Australian Tourism Data Warehouse (ATDW)⁸ has been used to supplement the limited ANZSIC information.

For the purpose of this Plan and based upon the ANZSIC and ATDW criteria, Table 1 is indicative of the type of tourism-characteristic sector businesses and occupations found in the tourism industry.

Tourism-Characteristic Sectors	Types of Businesses	Types of Occupations
Serviced Accommodation	Hotels, guest houses, B&Bs, inns, motels and hostels	Chefs, Bar Attendants, Kitchen Hands, Waiters, Customer Service/ Reception Staff, Housekeepers, Managers
Hospitality	Cafés and restaurants	
Un-serviced Accommodation	Caravan and camping parks and self-catering	Operations Managers, Maintenance, Cleaners, Front Office / Reception
Attractions	Cellar door, museums, galleries, national parks	Sales and Customer Service Staff, Tourism Enterprise Managers, Attraction Guides
Events, Festivals, Meetings	Major events, regional festivals, conferences and meetings,	Event and Function Managers and Organisers, Sales Managers
Tour	Tour operators, water-based cruises	Tour Guides and Leaders, Office and Sales Staff
Transport and Hire	Houseboat, limo transfer services, coach services	Call Centre Operators, Coach Drivers, Flight Attendants, Mechanics
Product Development, Marketing and Distribution	Travel agency, wholesalers	Travel Consultants, Inbound Tour Operators
Visitor and Destination Information	Visitor Information Centres Tourism organisations (State and Regional)	Professional and Managerial roles in Marketing, Sales, Visitor Information and Research

⁸ The ATDW system provides a central distribution and storage facility for tourism product and destination information from all Australian States and Territories. The information is compiled in a nationally agreed format and electronically accessible by operators, wholesalers, retailers and distributors for use in their web sites and booking systems. Those registered on the ATDW are considered actively involved in the tourism industry.

6.0 TOURISM INDUSTRY PROFILE

6.1 EXPENDITURE

South Australia's Strategic Plan identifies the tourism industry as a key economic driver for South Australia. The tourism target of \$6.3 billion in visitor expenditure by 2014 is the current measure of its economic potential as an industry.

Current figures indicate that in the year ending September 2006, travel and tourism generated \$3.9 billion of expenditure in South Australia. This was derived from a total of 5.6 million visitors and 26.4 million visitor nights⁹.

South Australia's tourism industry competes in both the domestic and international marketplace. In the 12 months ended September 2006, this comprised:

- 350,700 international visitors who spent around 7.5 million nights,
- 1.9 million interstate (domestic) visitors who generated 9.2 million nights; and
- 3.4 million intrastate (domestic) visitors who generated 9.7 million nights.

6.2 EMPLOYMENT

Provisional SA Tourism Satellite Account (TSA) figures suggest that South Australia has over 34,000 persons employed by tourism. The final figures will be released in the first half of 2007.

While not representative of all tourism industry sectors, in general, the characteristics of the industry are:

- predominantly female (with males accounting for 40.7% of industry employment compared with the State's all industry average of 55.7%)¹⁰
- high levels of labour mobility (i.e. transient workforce)¹¹
- high levels of employees under the age of 25.¹²

While growth in the industry may improve seasonality (and therefore variability in demand for some types of employees) it is likely to continue to be a feature of the industry.

At a national level, estimates have suggested that every additional \$1m of tourism expenditure creates 6-8 additional jobs, compared to less than one job in manufacturing and less than half a job in mining. This means that tourism has the capacity to employ proportionally more people per dollar than other industries such as mining and manufacturing.¹³

6.3 REGIONAL SOUTH AUSTRALIA

The tourism industry is geographically dispersed, offering experiences to visitors across all parts of the State. In 2005, 71% of day trips, 62% of visitors that spent at least one night in SA, and 53% of overall visitor nights occurred in regional areas of South Australia. As an industry, tourism plays a key role in many regional areas.

Recently, regional tourism stakeholders, in conjunction with the SATC, have prepared Regional Strategic Tourism Plans. These have been prepared in four of the twelve tourism regions in South Australia.

One of the key outcomes of these Plans has been to determine the economic contribution of tourism at a regional level. An example of this is the Kangaroo Island Regional Strategic Plan, which estimates that visitor expenditure is currently \$21.9 million and tourism employment is approximately 14.5% of total employment on Kangaroo Island.

These Plans are expected to be prepared and updated within all tourism regions in the coming years. As each of these Plans will identify targets for growth, they will assist in identifying the potential implications for workplace requirements.

6.4 TOURISM BUSINESSES

In July 2006 there were 2971 tourism businesses registered on the Australian Tourism Database Warehouse. It is estimated that this represents between 90-95% of businesses that are directly engaged in the tourism industry within South Australia.

This compares with ABS estimates released in 2003 that indicated that there were 4042 'tourism-characteristic' businesses within South Australia.¹⁴ Of these:

- 91% were defined as micro (less than 4 employees) and small businesses (between 5-20 employees);
- 9% were medium to large businesses, with 81% of these located within the metropolitan Adelaide region;
- Of the 27% of tourism businesses located in regional SA, closer to 95% on average were micro and small businesses. For example: Yorke Peninsula (100%), Mid North (99%), and Kangaroo Island (98%).



9 SATC, At a Glance, Issue 66, December 2006 (Tourism Research Australia, ABS)

10 DFEEST, Industry profile 2005 series: Accommodation, Cafés and Restaurants

11 VBCS report & other research

12 Skills Industry Report – Centre for Policy Studies, Monash

13 BTR Occasional Paper No 33

14 BTR Occasional Paper 34 defines tourism-characteristic businesses as having 25% input from visitors

7.0 KEY WORKFORCE INFLUENCES

THE ANECDOTAL AND TANGIBLE EVIDENCE OF WORKER SKILLS SHORTAGES IN TOURISM CANNOT BE SIMPLY ATTRIBUTED TO AN INABILITY OF THE EDUCATION AND TRAINING SYSTEM TO PREPARE PEOPLE TO MEET THE INDUSTRY'S DEMAND FOR SUITABLE LABOUR.

Industry and regional structures, business sizes, workplace conditions, the mobility of workers and seasonal factors can all contribute to labour market imbalances.

However, equally importantly, we must understand the substantial changes in our society that are shaping the future labour market environment. These issues form a useful backdrop to our consideration of the reasons why people may consider – or reject – the idea of working in tourism, and how the industry might attract young and old to do so.

The three most significant trends in this regard are: the baby boomer generation reaching retirement; competition for increasingly scarce labour resources; and changing attitudes relating to work.

7.1 THE AGEING POPULATION

As the baby boomer generation reaches retirement age, the labour market is shrinking. This will be most noticeable from about 2010 and will continue to impact over the next 20 years. This has particular implications for South Australia because:

- South Australia currently has the oldest population in Australia, and its average is rising more quickly than any other State or Territory in Australia¹⁵;
- one-third of the State's current workforce will be approaching retirement within the next 10 years;
- there will be less entrants into the workforce due to the steady decline of South Australia's population share, which is expected to fall to 5.6% by the year 2051¹⁶;
- there is a government focus on increasing school retention rates¹⁷; and
- the predominance of females within the tourism industry is unlikely to change in the short-term, with approximately 60% of students on average currently studying tourism at all levels being female¹⁸.



7.2 COMPETING INDUSTRIES

Within this scenario of a diminishing labour pool, it is expected that the significant growth in industries such as mining, construction and defence will continue. These industries have the capacity to offer substantial remuneration packages, have a more cohesive approach to investment in training and have a greater need for technical occupational skills.

With expansion predicted to continue in these industries, tourism will increasingly have to compete for suitably skilled people, not only to fill new positions, but also to retain and replace existing positions.

The growth of these industries, particularly within regional areas such as Roxby Downs, may however offer opportunities for the tourism industry. Many of these industries, and especially mining, are male-dominated. This not only provides an opportunity to employ spouses, but also to work collaboratively with these industries to attract workers into regional areas.

7.3 CHANGING WORKFORCE EXPECTATIONS

There is a range of factors influencing the expectations and motivations of each segment of the labour market e.g. parents 'wanting more' for their children and the mature-age seeking greater flexibility and connection with people and places.

In general, employees at all stages of their careers and lives are increasingly placing greater importance on work-life balance. Research suggests that:

- The tourism and hospitality industry currently relies on the younger generation for most of its staff intake. Influenced greatly by their parents in the baby boomer generation, the so-called Generation Y – those born 1976-1991 – are proving to be more selective in their career choice. They are harder to recruit and harder to retain for any length of time. They are increasingly following non-linear (diverse) career paths.
- While also seeking work-life balance opportunities, mid-career (experienced) employees tend to be more conservative, are less transient and often seek flexibility focused around the family; and
- Mature-aged workers also share similar motivations to young people for working, such as income, personal fulfillment and opportunities to contribute to society.

The economic implications of these trends are far-reaching, particularly with the ageing and decreasing working population. Similar to all industries, the most significant impact will be a reduction in workforce participation in the tourism industry.

As will be demonstrated later, the tourism industry is not in a strong position to competitively address the gap between the industry's workforce requirements and the workforce that will be readily available to it.

¹⁵ State Workforce Development Strategy 2005

¹⁶ DFEEST, People, Jobs and Skills Report 2005

¹⁷ State Workforce Development Strategy 2004

¹⁸ SATC Labour Supply Survey 2005

8.0 STRATEGIC IMPERATIVES

8.1 BRAND SA

In the highly competitive global economy South Australia seeks to develop and promote the best that it has to offer. Extensive positioning and branding work has determined that South Australia will position itself as a *'vibrant and welcoming place that celebrates and represents the good things in life'*¹⁹.

Brand South Australia, the foundation for the State's profile – expressed in the tag-line South Australia. A brilliant blend is a focused business strategy designed to assist in developing South Australia as a destination for visitors, business investment, exporters, migrants and international students.

The attributes of the SA workforce generally and those of the tourism and hospitality industry in particular, will need to embrace and reflect the qualities inherent in the brand strategy.

The 'intangible people' elements of the tourism industry are integral to the standard, quality and effective delivery of the experiences that South Australia has to offer. A reputation for excellent customer service is crucial in this regard.



8.2 REGIONAL DEVELOPMENT

South Australia's Strategic Plan seeks to strengthen regional communities. There is also an increasing demand to find ways to retain people within local communities.

Tourism is one of the few economic sectors that provide opportunities in most areas. The type and quality of experiences offered within different regions will influence the broader workforce demands of the industry.

This will involve developing a regional talent pool of people who could respond flexibly to the changing location of demand. It also involves strengthening young peoples' capacity to find pathways to employment that don't involve leaving the region, if they don't wish to. Tourism can play an integral role in this regard.



9.0 TOURISM INDUSTRY FORECASTS

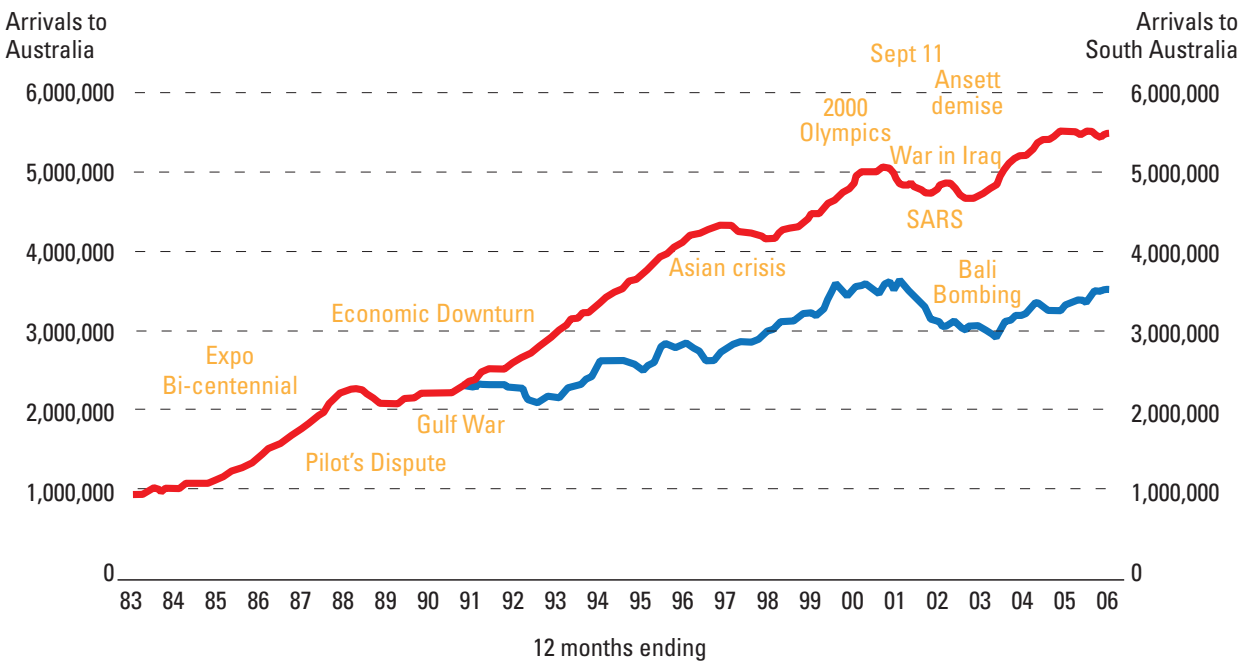
9.1 INDUSTRY GROWTH

The tourism industry pre-2000 was widely acknowledged as being a 'shining light' for economic and employment growth both nationally and within South Australia.

However, Post-2001, with the increasingly complex range of external factors influencing the industry, things have changed. As Figure 1 shows, while resilient growth has continued both to Australia and to South Australia, it has been more modest than pre-2001.

Overseas arrivals represent about 20% of Australia's national tourism demand (expressed in visitor nights) and about 12% of South Australia's visitor nights. By far the largest component of tourism demand is the domestic market (Australian's travelling within Australia), which has been growing at more moderate rates over the same period.

SHORT-TERM VISITOR ARRIVALS TO AUSTRALIA AND SOUTH AUSTRALIA



Source: ABS Cat No. 3401.0 & TRA IVS

Trend graph overseas to australia

9.2 TOURISM WORKFORCE SCENARIOS

There is currently no definitive tool available to accurately project employment growth within the tourism industry in Australia or South Australia. The difficulty in defining and acquiring data on the industry is a key reason.

The recently developed State Tourism Satellite Accounts provides a benchmark for understanding current employment figures within the industry in South Australia, but, as yet, there is no methodology to forecast what numbers will be required into the future.

Hence, three scenarios, with an additional 'best fit' scenario have been examined to give an indicative guide of the possible employment projections to 2015.

Scenario 1: Based on Tourism Forecast Council – Visitor Nights for South Australia (April 2006)

Under this scenario, it is assumed that growth in tourism employment will increase at a similar rate to forecast growth in visitor nights. The Tourism Forecasting Council projects an overall average annual growth in both domestic and overseas visitor nights in Australia of 2.2% to 2015.

Assuming that South Australia maintains its current share of national visitor nights then the average annual growth rate of visitor nights into South Australia to 2015 will be 1.8% growth. (As there is potentially excess capacity of people within some parts of the industry, it is noted that employment growth is likely to marginally less than this.)

Scenario 2: Based on findings from SATC Industry Needs Survey – December 2005

The SATC Industry Workforce Survey 2005 provides some indicative evidence of forecast demand for persons employed in the tourism industry in South Australia.

The results of the Survey indicated an expected annual growth for employment to 2010 at approximately 2.0% growth. This figure is assumed to hold true through to 2015. It is noted that the accuracy of this predicted growth is somewhat limited, mostly due to the under-representation of larger metropolitan-based employers in the survey.

Scenario 3: Based on annual percentage changes in employment by ASCO Occupations for SA – Monash University, Centre of Policy Studies, December 2005

In 2005, the Centre for Policy Studies at Monash University modelled ABS data. The results showed a predicted average annual growth in ASCO occupations within the tourism industry to 2013 of 0.4%.

This growth figure is often used, but is considered to be low, as these classifications do not necessarily represent the full range of tourism-specific employers actively involved in tourism in South Australia.

Scenario 4: 'Best-Fit' Scenario – Based on 1-3 above

Based on the above, it is assumed that actual employment growth within the SA tourism industry will be somewhere between scenario 2 (2.0% pa) and scenario 3 (0.4% pa) with a line of 'best fit' calculated at 1.2% pa growth.

Based on this, the potential tourism workforce needed by 2015 is therefore likely to be between 38,000 and 46,000. At 1.2% pa growth, the industry is likely to employ 42,000 persons by 2015 (i.e. an additional 8,000 people).

While this growth may be considered somewhat conservative from that would have been expected prior to 2000, it clearly shows that there will continue to be an increased demand for labour participation in the tourism workforce.

It should be noted that these scenarios are themselves based on a constant policy scenario. Should SA commit to addressing the five critical success factors identified in the South Australian Strategic Plan Tourism Implementation Plan – designed to achieve the tourism target (T1.15) – then greater employment growth can be expected.

More importantly however, the major issue is not just how to attract new people into the workforce to meet expected demand, but how to retain the existing workforce in light of an increasingly competitive labour market.

9.3 GROWTH BY OCCUPATION

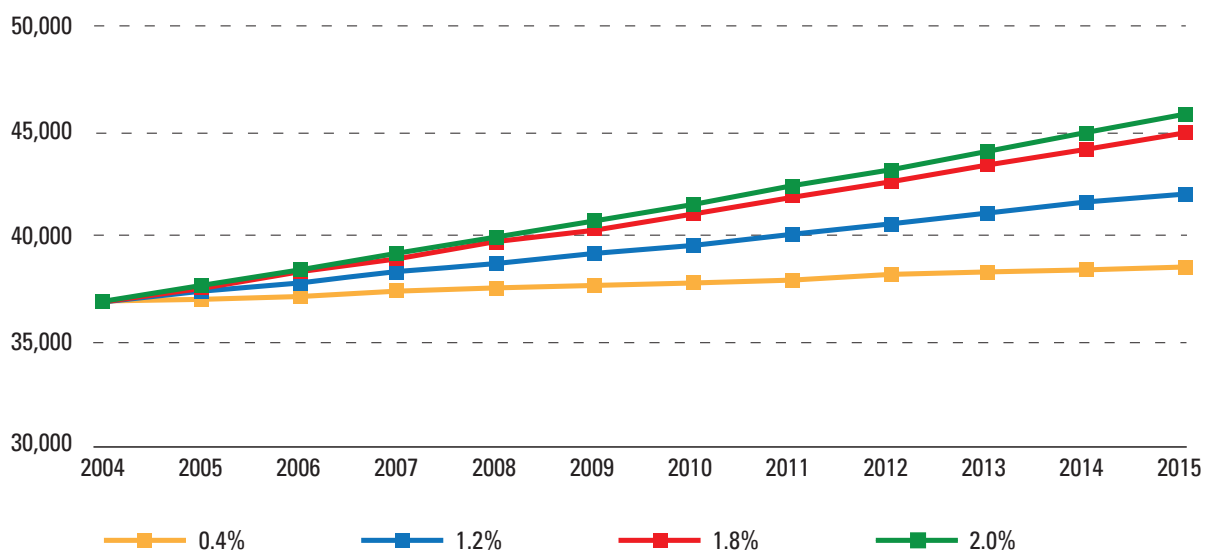
Examining which occupations are likely to experience an increase in demand is valuable in the forecasting of skills shortages. Yet the diversity of the industry and paucity of data ultimately makes it very difficult to forecast precise operational breakdown.

Despite these difficulties, there are some skills shortages that are already being predicted, but to date mainly within the hospitality sector. From the 2005 ABS modeling undertaken by Monash University we can determine that the occupations that will experience the largest increase in demand will be chefs and cooks.

The SATC Industry Workforce Survey 2005 supports these findings as does other research conducted within the hospitality sector²⁰; the tourism industry at a national level²¹ and feedback provided by the Working Party.

The 2005 ABS modeling and SATC Industry Survey highlighted that other occupations also expected to experience increases in demand were restaurant and catering managers and caravan and camping park managers. For the tourism-specific sectors there is likely to be a generally higher growth rate in non-managerial type roles, such as cleaners and customer service/sales staff.²²

GROWTH FORECAST TOURISM EMPLOYMENT – SOUTH AUSTRALIA



Source: SATC based on preliminary TSA, Monash Dec 2005, TEC April 2006 night SATC BNS

²⁰ National Skills Shortage Strategy, 2005

²¹ TTF Members Survey, August 2005

²² SATC Industry Survey, December 2005

10.0 KEY WORKFORCE ISSUES AND IMPERATIVES

TOURISM MUST BE A COMPETITIVE PLAYER IN THE LABOUR MARKET TO SUSTAIN ITS WORKFORCE.

To tackle the challenge of workforce development the industry should focus on addressing the following imperatives. These are dealt with in more detail in Section 12.0.

INDUSTRY WORKFORCE DEVELOPMENT CAPACITY

- The industry must improve its leadership capacity and capabilities i.e. self-reliance where the industry serves the industry through an industry body.
- The industry must forge productive partnerships with other key stakeholders – especially the training and education sector.

EDUCATION FOR ENTRY TO TOURISM

Secondary

- Schools need to provide general insights into tourism and in conjunction with industry promote tourism as a possible career opportunity.
- Schools should ensure school leavers are 'job ready' with generic skills, which can be adapted and augmented with on-job training for new staff.
- Greater cohesion is required between secondary school teachers and the tourism industry (mentoring).

Tertiary

- Universities should continue their higher-level education role in specialty skills (e.g. University of SA - tourism management; Flinders University - cultural and eco-tourism).
- TAFE and RTOs need to move from a notion of 'training for business' to 'training within the business' (i.e. flexible on job, in-time and in-place modular training).

RECRUITMENT

- The industry should focus on promoting itself to young people as an exciting job opportunity.
- There is a need for more support and encouragement from employers in relation to meaningful work experience and placement for students.
- The development of strategies is required to encourage overseas students/travellers, mature age, immigrants, return to work and indigenous people to enter the industry.

RETENTION AND PROGRESSION

- The industry needs to focus on retaining current staff by providing improved career pathways.
- The tourism industry must work to make employment in the industry more appealing with better pay and conditions of work.
- The industry must investigate innovative and flexible packaging of jobs to meet the needs of the contemporary labour market.

ENHANCING SKILLS

Employees

- The industry should ensure that training delivery meets industry needs and expectations of employees.
- Training options offered to employers should be more flexible, preferably in short sharp bursts rather than extended formal courses.

Employers

- The tourism and hospitality employers should be encouraged to invest in training.
- It is essential for regional businesses to work with regional network of stakeholders to improve on-job training delivery.

INDUSTRY WORKFORCE TRACKING AND MONITORING

- Better data sources are required to improve analysis of workforce trends and identify implications for the industry.
- The industry needs to improve forecasting, identify new projects and put place specific strategies for emerging high demand situations (cf initiatives put in place for Adelaide Airport).



11.0 CRITICAL SUCCESS FACTOR

THE SOUTH AUSTRALIAN WORKFORCE DEVELOPMENT STRATEGY²³ IDENTIFIES WORKFORCE DEVELOPMENT AS A SHARED RESPONSIBILITY OF GOVERNMENT, BUSINESS, INDUSTRY, COMMUNITY AND EDUCATIONAL INSTITUTIONS AND TRAINING PROVIDERS.

However, without question there is a need for a collective representative industry entity to provide leadership, especially in the field of workforce development.

During the course of consultations it was often stated 'the industry needs to do this', or 'the industry needs to do that' (also see responsibilities for actions in Implementation Action Schedule – Appendix 1). However, when referring to the need for the industry to do this or that it is essential to identify which organisation will be responsible. This is where difficulties arise.

The SA Tourism Commission, by default, has a significant leadership role within the industry. However, as a government agency whose core function is marketing, this leadership role cannot effectively be extended to the mechanics of specialized business matters to connect the industry with the myriad stakeholders and programs in the complex area of workforce planning (Section 13 outlines the array of partners and stakeholders related to the issue of workforce planning for the industry).

That is, only the industry can truly look after the business interests of the industry. A mature industry takes responsibilities for its own needs.

The hotel sector has its own peak body (Australian Hotels Association), but this represents only one sector of this diverse industry. The capacity of the SA Tourism Alliance to represent the industry, given its small membership base and limited resources has meant that it is often considered more of a lobby group than a representative industry body.²⁴ As such, there is currently no clearly strategic and broadly representative body providing leadership for the industry²⁵ and is therefore an issue that needs further investigation.

The Food, Tourism and Hospitality Industry Skills Advisory Council (FTHISAC) handle many of the issues relating to training for tourism. Through the FTHISAC, there is potential funding available to assist in the implementation of this strategy. However, the FTHISAC, while a significant player, particularly in hospitality, is not a representative tourism industry body with broad industry connections (although the Tourism Alliance, and therefore its current limited membership, is represented on FTHISAC's Tourism and Hospitality standing committee).

The FTHISAC has developed strong working relationships with the Australian Hotels Association and the Restaurant and Catering Association. However, it finds it challenging to connect with the rest of the tourism industry in the absence of a representative body with the capacity to undertake research, develop policy and promote opportunities to its members.

There is clearly an opportunity for greater collaboration between a broadly representative tourism industry body and the FTHISAC to address implementation of tourism workforce development needs and deliver on specific key performance indicators (KPIs).

Other States have begun work on workforce development in the tourism industry. For example, the Tourism Council of Tasmania has piloted a project trialing an innovative solution to the issue of seasonality in the hospitality industry. The Queensland Tourism Industry Council has assembled training providers, training resources, industry suppliers and support services to deliver training to large and small centres across the State.

The South Australian tourism industry must have capacity and capability to pursue work-force planning initiatives on behalf of tourism businesses across the State. In particular, it must have the capacity to navigate through the programs and opportunities that currently exist at both Commonwealth and State level.²⁶ In many cases it is not a question of needing new programs, but knowing how to access or leverage existing programs.

The need for a strong tourism industry body working closely with the FTHISAC must be addressed as a matter of priority for workforce issues to be meaningfully addressed.

The establishment of this industry body will have the primary role in driving and monitoring the Tourism Workforce Strategy – Implementation Action Plan in Appendix 1.



²³ A Strategy for the Development of South Australia's Workforce to 2010, 2005 Tourism Workforce
²⁴ Development Research: Qualitative Survey of Stakeholders, Vincent Burke Consulting Services, June 2006

²⁵ Ibid
²⁶ See Australian Government response to National Tourism Emerging Markets Strategy Report Investing today for tomorrow and National Tourism Investment Strategy Report Investing for our future, January 2007, pages 88-105

12.0 OBJECTIVES AND STRATEGIES

12.1 INDUSTRY WORKFORCE DEVELOPMENT CAPACITY

The high proportion of fragmented small businesses reduces the capacity of the industry as a whole to implement workforce strategies.

Like most industries with a high percentage of micro to small sized enterprises lack of financing, difficulties in accessing and exploiting technologies, limited spending in research and development, lack of information, limited management capability, low productivity and difficulties in managing change, significantly influences business profitability as well as the capacity of the industry to reach its economic potential.²⁷

The growing complexity and range of industry and workforce drivers means that tourism businesses have an increased need for improved access to information, management systems and processes that can assist them in maximizing workplace productivity and professionalism.

In particular, the lack of critical mass and accessibility issues especially in regions means that tourism businesses are unlikely to have good access to information; training and services to support them understand and implement retention strategies.

Access to information on new industrial relations legislation is not always obvious. There is often little industry understanding, particularly in small businesses, of how this legislation can apply to tourism and little feedback, or promotion on how some have applied it already within the industry.

There are currently 40 known industry sector associations representing tourism industry needs in South Australia. The capacity of these Associations varies significantly, as does the role that they provide to their members and the profile they have in the industry itself.

These Associations range from the hospitality-focused Australian Hotels Association, Catering and Restaurants Association, to the more tourism-specific Associations such as Meetings and Industry, Houseboat Hirers and Bed and Breakfast Associations (see Appendix 2 for a complete list).

The focus of many of these Associations is to provide members with assistance for compliance and quality assurance requirements rather than industry collaboration or investment in training. In some cases, Associations can be approached directly for advice when negotiating Enterprise Agreements. Many niche tourism businesses are currently not represented, such as Indigenous tourism, or under-represented at the state-level, such as nature-based tourism sector.

The Food, Tourism, Hospitality Industry Skills Advisory Council (FTHISAC) currently play an important role in the delivery of workforce planning for the tourism industry. A number of government agencies, at a federal, state and regional level, also support workforce development initiatives, particularly to small businesses (see section 13).

The FTHISAC has indicated they generally have difficulties engaging a large number of small industry sectors. Industry fragmentation and diversity make it difficult for collaboration between the public and private sectors and for coordinated workforce development responses, particularly at the regional level.

The tourism industry currently lacks the professional leadership capacity to adopt an industry-wide commitment to workforce planning. Achieving resource efficiencies and early solutions to industry needs often occur when there is a single entry point or coordinated mechanism with a tourism focus already in place.

Industry leadership by and for tourism businesses has been identified as one of the critical success factors to achieving the South Australia's Strategic Plan target (SASP Tourism Implementation Plan).

A peak industry body is essential to provide a connection between tourism businesses and Commonwealth and State workforce programs; forge links with the Food, Tourism and Hospitality Industry Skills Advisory Council; and to education and training providers for the promotion workforce planning needs and opportunities; to undertake workforce research, policy advocacy, tourism quality standards and assurance; and to provide any regulatory compliance advice.

Other industry sectors have a more cohesive framework in which to work, and recognise the benefits that investing in training provides. An example of this is the Construction Industry Training Fund. The tourism industry may have to investigate such funding options for its medium to long-term sustainability.

It is highly recommended that the industry have an effectively resourced Tourism Industry Body. Although this will be difficult to achieve, it is now a critical imperative that industry leaders and stakeholders come together to address this issue as a matter of priority.

OBJECTIVE 1: **ENSURE A COORDINATED APPROACH TO WORKFORCE PLANNING AND PROVIDE AN EFFECTIVE BUSINESS SUPPORT NETWORK**

Strategy 1.1 Create a representative viable industry entity with the professional capacity and capability to identify and articulate the workforce planning and development needs of all tourism sectors within the industry (Including establishing a partnership between key tourism-specific education and training providers and industry stakeholders and promoting a range of networking, training, mentoring and business development information and opportunities specifically to cater for tourism businesses).

- 1.1.1 In the short-term, employ or second a coordinator to initiate partnerships and priority actions from this Tourism Workforce Development Strategy.
- 1.1.2 Investigate viable long-term options that will lead to greater self-reliance in the tourism industry and in the industry's capacity and capability in workforce planning.

12.2 EDUCATION FOR ENTRY TO TOURISM

In 2005, there were a total of 51,403 secondary students studying at Year 11 and 12 levels. 15,024 (29%) of these studied tourism related courses (includes Tourism, Hospitality, Tourism Ops VET, Kitchen Ops VET) in SA senior secondary education

- Year 11 – 34,745 students:
11,034 studied tourism related courses
- Year 12 – 16,658 students:
3,990 studied tourism related courses.

The survey of secondary school students conducted for this paper suggested that only 30% of these students were likely to choose to enter the tourism workforce, and many of these for only a short period.

There is considerable evidence that tourism as a subject is chosen primarily for study because it is an interesting 'soft' subject. On the positive side, this encourages a greater understanding of tourism as an industry.

As the industry does not provide clearly defined career prospects, paths and goals, it is at a significant competitive disadvantage compared to other industries and will potentially impact the quality of experience the industry wishes to provide.

There is currently little understanding or information available for people, particularly students, to make informed decisions about where, what and how they can study, up-skill and map careers within the tourism industry.

The current curriculum provides students (and teachers) with a general understanding of tourism. However this understanding does not necessarily convert into employment and career aspirations within the industry.

Assisting people to identify the training and employment systems to find information about careers and employment options is essential to help them make decisions about their future.

In most industries, qualifications are generally linked to compliance and regulation requirements. Overall, apart from the hospitality sector, the tourism industry is not highly regulated. As a result, most workers within the tourism industry are relatively unqualified.

Industry surveys such as the 2005 SATC industry survey, suggest desired industry skills fall into two categories: (1) occupation specific (marketing, cookery, tour guiding etc) which require certain technical skills and (2) generic employability skills, which relate to personal aptitudes, attributes and attitudes, which are developed through training and experience on the job.

Many occupations within the tourism industry generally only require basic and skilled vocational qualification levels. There is also an over-representation of workers with no post-school qualifications²⁸. Indicative of this is the accommodation and restaurants sector where only 30.3% workers have a non-school qualification, compared with the State's overall industry average of 46.7%²⁹.

However, it is noted that there is a growing requirement for specialised skills within the tourism industry, such as marketing, management, cultural and environmental management and interpretation, event management and policy and research that do require higher level qualifications. There clearly needs to be greater clarification of the roles of educational institutions in addressing these different requirements.

Surveyed tourism businesses, across all sectors, are increasingly demanding that workers with generic 'job-ready' skills, principally based upon personal skills and attributes rather than technical ones. For the industry the skills now being demanded include interpersonal relationships, problem solving, basic literacy, numeracy, adaptability and communication.

The Table below identifies the indicative types of skill sets desired by the tourism industry:

Table 2: Indicative Tourism Industry Skill Sets

Tourism-Characteristic Sectors	Specific Skills Sets	Core (Competency-based) Skills	Emerging (Broad) Skills
Serviced Accommodation	Job-Specific skills related to: • Communication and customer service	Employability Skills such as: • Communication • Numeracy and literacy • Teamwork • Problem solving • Initiative and enterprise • Self management	• Proficiency in languages • IT and technology • Knowledge of tourism product, organisations and structures • Workforce management
Hospitality	• Food and drink handling and supervisory management • Business and financial administration		
Un-serviced Accommodation	Job-specific skills relating to: • Customer service • Business management • Operational management		
Attractions	Job-specific skills related to:		
Events	• Customer service		
Tour	• Marketing		
Transport	• Selling		
Visitor and Destination Information	• Business and people management • Interpretation		

²⁸ Industry Skills Report, June 2006

²⁹ DFEEST, Industry profile 2005 series: Accommodation, Cafés and Restaurants

The industry considers on-job training the key to sustaining its future growth. The current education and training system focuses on creating a 'pool' of qualified people for the industry to choose from. This means that training is mostly conducted from a central location and provides a challenge for implementing on-job training methods.

Increasingly, the industry is seeing this 'pool' of people as not having the skills they require and that training is not occurring in the locations that they need to be (i.e. some regional areas have tourism-specific training courses).

Many of the available courses also tend to provide the full range of skills (entry through to management) at once. This is reflected in the growing issue of tourism students completing a 2-3 year course who then work in the industry but do not immediately require the advanced skills gained. This results in skills and knowledge being lost before people are able to use them. This is relevant given the trend for people to leave the industry after a short period.

There is currently very limited industry engagement within the secondary school system, either with students or with teachers to improve the practical understanding and knowledge of the industry.

Given that many in the industry are time-poor, that there is no formal mechanism for accessing industry representatives and that there are limitations in providing industry placements, the quality of curriculum and knowledge of the teachers is becoming even more compromised.

(NOTE: It should be noted that the SACE (South Australian Certificate of Education) is currently undergoing a transformation following the release of SACE Review findings in June 2006. The new or future SACE is scheduled to commence for Year 10 students in 2008. An integral part of the future SACE is that all young people are to develop a personal learning plan to support and enable them to have a clearer sense of 'where they want to go' and 'how to get there'. Through the personal learning plan students will have the opportunity to develop their own SACE learning program, and other plans, to assist their passage from school to tertiary education, training and work. It is envisaged that the majority of students will develop their personal learning plan while in Year 10).



OBJECTIVE 2:

DELIVER EDUCATION AND TRAINING PROGRAMS THAT WILL MEET THE NEEDS OF THE INDUSTRY

Strategy 2.1: Strengthen the secondary school curriculum to provide a realistic understanding and knowledge of the tourism industry.

- 2.1.1 Create a curriculum resources package for all secondary teachers in which numeracy and literacy activities in traditional subjects include tourism topics and examples.

(The resource would be targeted at the secondary school year levels of years 8 to 10. Examples include: Spreadsheet analysis of yield management within a hotel/airline as part of the maths curriculum. A literacy resource in which students are required to respond to letters of inquiry of a tourism nature as part of the English curriculum).

- 2.1.2 Identify an industry representative to support the current web based resource centre for secondary school teachers (and others) to ensure consistent, relevant and up-to-date materials (brochures, newsletters, statistics, etc) are available for tourism and hospitality course contents.

Strategy 2.2: Establish partnerships to improve industry engagement and recognition at the secondary and tertiary levels.

- 2.2.1 Develop a formalised mentoring system linking secondary school tourism teachers and school administrators to 'mentors' from the industry. (This mentoring process could include a short-course 'Train the Teacher' program).
- 2.2.2 Work with the Council of Australian Secondary Tourism Teachers (CASTT) to develop a resources kit that supports and guides industry mentors and presenters within the secondary school system.
- 2.2.3 Work with CASTT to include tourism as part of a professional development program supported by a recognised Tourism Teacher Award. (Investigate the potential for this to become a nationally recognised Award).
- 2.2.4 Develop a work experience program aimed at year 10 and year 12. (Support this program with an active database of industry participants and a resources kit that includes case studies defining both industry and student expectations during this work experience placement).
- 2.2.5 Encourage greater involvement and support and possibly sponsorship from industry for TAFE SA and Universities graduation ceremonies, dinners and functions in addition to curriculum mentoring.
- 2.2.6 Develop a State 'Best Tourism Student' Award at the tertiary level that has a focus on customer service excellence (the industry can reward excellence with either employment or visitor experience opportunities).
- 2.2.7 Encourage the appointment of persons with tourism knowledge onto other key SSABSA, TAFESA and University Advisory Committees to maintain and enhance profile of tourism in our schools.
- 2.2.8 Identify ways to include effective information on study pathways in the tourism and hospitality subject delivery at secondary level.

12.3 RECRUITMENT

To sustain its workforce, the tourism industry must remain a competitive player in the labour market. Taking into account current trends in the labour force, the tourism industry must not only look at whom it is recruiting, but just as importantly, monitor the effectiveness of the methods it uses when recruiting its workforce.

While it is often accepted that people will come and go in the industry (particularly hospitality), the diminishing labour-force worldwide, means there is now an imperative that tourism must become a career and an employer of choice.

However, significant barriers to achieve this include the very nature of the tourism industry i.e. it does not operate during 'traditional' working hours. There is also a tendency within the industry for these hours to be long and often inflexible. Many potential employees see these elements as being 'anti-social' and 'incompatible' with desired lifestyles.

Furthermore, there are a number of key occupations essential to the tourism industry, such as cleaners, waiters and maintenance workers that are not seen as 'desirable' within a more selective (particularly with the young) labour market.

Many micro and small businesses within the industry are relying heavily on word-of-mouth, direct approaches by applicants, shop-front and newspaper advertising to recruit workers.

Reliance on traditional recruitment methods, such as word of mouth, will increasingly provide limited access to potential pools of workers, and in a diminishing labour market, is likely to encourage the trend of 'poaching experienced workers' from within the industry.

While there is an increasing trend towards the use of the internet and employment/recruitment agencies, there is a tendency for these methods to focus on full-time employment opportunities, where many of the opportunities offered by the industry will potentially be part-time.

A number of larger organisations, for example the Adelaide Convention Centre, adopt more formalised and strategic recruitment approaches, including creating stronger partnerships with training organisations such as Adelaide TAFE and organisations such as DOME³⁰. Some industry sector associations, particularly the hospitality sector, also actively participate in 'future career' initiatives held by secondary schools and other education institutions.

Research suggests that secondary school students are making career pathway decisions around the year 10 and year 11 levels. There is also evidence that competing industries are likely to continue adopting more strategic recruitment and retention strategies, including improving the profile of their industries within the secondary school system (i.e. participating in career awareness and incentive programs). Tourism must compete actively in this environment especially for those prospective employees that have a 'people'/ hospitality aptitude.

The industry itself does little to promote its benefits to potential recruits. While some industry sector associations participate at career and employment expos, there is poor representation of the industry as whole at these events.³¹

The labour workforce can no longer be viewed as a homogenous entity. The traditional expectation of the industry on a ready supply of young workers mean that there is a limited understanding of the opportunities offered by or of the personal needs of potential workers from other labour sources.

There are indications that due to the size of the aging population there may be incentives created to encourage people to delay or defer retirement. In South Australia, this may become more relevant, particularly with a growing incidence of mature-aged women entering (and re-entering) the workforce.

The Commonwealth's Welfare to Work legislation has the potential to release more people into the workforce. However, this 'pool' is diminishing with unemployment rates decreasing.

The physical nature of many of the occupations, and the importance placed on personal attributes and attitudes has also meant there is a general reluctance by the industry to recruit from these markets.

There is also potential to provide the industry with access to a larger worker pool through reviews and updating of immigration legislation to facilitate tourism employment opportunities. To date, there have been some concessions provided to the tourism industry mainly through working visas.

Recent changes to working visas enable working holiday makers (WHMs) to work for a maximum of twelve months with any one employer over two years (through a combination of extending the existing limit by six months and by allowing those who have worked for a minimum of 3 months in primary industry in regional Australia to apply for a second visa for a period of six months).

OBJECTIVE 3:

POSITION TOURISM AS AN EMPLOYER OF CHOICE TO TARGETED SECTORS OF THE CURRENT AND FUTURE LABOUR MARKET AND PROMOTE CAREER OPPORTUNITIES ACCORDINGLY

Strategy 3.1 Determine best fit 'segments' within the current and future labour markets and promote to these segments

- 3.1.1 Commission research to define the best labour market prospects to fit the current and future tourism industry.
- 3.1.2 Develop a register for industry representation at career expos and school career days.
- 3.1.3 Seek synergies with emerging industries such as mining and defence (i.e. employment of spouses of workers in these industries).

Strategy 3.2: Promote the industry experience (skills gained) of students and/or past students and employees to provide a realistic understanding of career and employment opportunities

- 3.2.1 Develop a database of recent graduates of courses and industry representatives who are willing to participate in information sessions to realistically illustrate the employment outcomes and career opportunities that the tourism/hospitality industry can offer.

Strategy 3.3: Continue to advocate to the Federal Government for legislation that influences the industry's capacity to attract and retain employees

- 3.3.1 Advocate amendments to the Migration Act to extend Student Visas to allow them to work in Australia.
- 3.3.2 Establish formal links with the Department of Immigration and Multi-cultural Affairs (DIMA) to promote tourism employment opportunities.
- 3.3.3 Liaise with DIMA to add more tourism classifications to the Skills Occupation List (SOL). These classifications should be updated according to identified skills or labour shortages as they arise.
- 3.3.4 Advocate for incentives that support suitably skilled people staying or moving to regional and remote areas. This may include tax benefits (particularly income) for workers who choose to move to these areas.

Strategy 3.4: Align the industry with Commonwealth and State employment initiatives to support participation by a broad range of social sectors

- 3.4.1 Produce information that can advise the industry of the benefits of and programs available for employing mature workers, particularly female; the underemployed, sole parents re-entering the workforce from 1 July 2006 as a result of changes to sole parent benefit regulations and the opportunities that exist under current migration programs.
- 3.4.2 Promote seasonal employment opportunities available under the Working Holiday Makers Program to tourism industry operators.

Strategy 3.5: Support the implementation of the FTH Skills Council SHIFT.com website proposal

- 3.5.1 Once developed, discuss the type of marketing support that will assist tourism businesses accessing the FTH Skills Council SHIFT.com website proposal.
- 3.5.2 Develop an industry endorsed competency-based skills template for tourism-specific sectors to add to this website.



12.4 RETENTION AND PROGRESSION

Perhaps more significant than problems with recruiting labour is the difficulties the industry has in encouraging experienced and suitably skilled workers to stay within or re-enter the industry.

High staff turnover and loss of experienced workers to the industry has a significant impact on businesses, particularly small to medium enterprises. These impacts include loss of productivity in achieving business goals, loss of overall profitability for the business, and general disruption to working environments and sometimes staff morale.

While not statistically measured, trends and feedback would also suggest that there are high numbers of suitably skilled people leaving the industry and not returning. With the possibility of less new entrants, it will become imperative that the tourism industry recognize the need to present career and flexible job situations that can potentially create permanent and full time employment opportunities to experienced and suitably skilled workers. This is particularly true of regional areas.

However, the characteristics of the industry, mainly small businesses, non-traditional hours, lack of critical mass, and seasonal demands that are often part-time or casual in nature makes it difficult to find mechanisms that can match both the needs of industry and the needs of the workforce. Many of the barriers that apply to recruiting workers into the tourism industry also apply to the retention of staff.

Retention rates are higher in occupations linked to marketing, research, visitor information, attractions, tour guides and operators and managerial roles. However, these occupations comprise a smaller proportion of the tourism industry and tend to offer higher remuneration and a more professional, recognizable and transferable career path.

It is now common for businesses across a wide range of industries to use non-wage forms of remuneration that are not fully captured in the standard wage measures, such as bonus payments and more flexible working arrangements.³² These practices aim to achieve the best possible match between the business interests of employers and the personal and professional interests of individual employees.

The barriers facing tourism businesses located in more remote locations are greater than those within metropolitan Adelaide. Additional issues of access to accommodation, transportation and distance to travel to work, cost of living, isolation from social and community interests all have a significant impact on the capacity of the tourism industry to attract and retain workers³³.

With many of the new tourism experiences and investments being located in regional South Australia, solutions for the above issues will increasingly become more important. There is currently limited government incentives (such as income tax breaks) available to assist tourism businesses to encourage people to stay in regional areas where there is potential for tourism growth to occur.

The industry does not always effectively value its employees. Too often, tourism, and in particular hospitality, is seen as 'the job you have before you have a real job'.

³² Reserve Bank's Statement on Monetary Policy published in May 2006

³³ Removing the Barriers Investment in Regional SA, Minister's Tourism Round Table Working Party Paper, 2005

The dominance of part-time and casual work within many of the industry sectors has made it difficult for the industry as a whole to promote itself as offering progressive, career opportunities. It also reinforces the perception that obtaining 'permanent' or full-time employment is more difficult.

There is also limited recognition of (competency-based) prior learning skills within career pathways. A greater focus on career pathways will require the industry, potentially with the assistance of government, adopting innovative approaches to overcome the shortcomings of a high proportion of micro and small businesses and a lack of critical mass within South Australia.

In some cases, the paths may need to lead to opportunities beyond the tourism industry or even Australia. There is also a growing workforce demand for these paths to encourage recognised re-entry into the industry at different stages of a person's career.

For the most part, the responsibility of workforce retention lies with the industry itself. Governments can assist the industry by ensuring the increasing regulatory policy environment remains supportive of tourism.

OBJECTIVE 4:

DEVELOP STRATEGIES TO IMPROVE RETENTION AND CAREER PATHWAYS WITHIN THE INDUSTRY

Strategy 4.1: Increase the capacity to up-skill when required and recognize prior learning as part of training processes.

- 4.1.1 Undertake sector specific on-time training after graduates gain employment.
- 4.1.2 Seek government assistance for shorter non-accredited tourism training to be either accredited or approved for funding support.

Strategy 4.2: Encourage industry sectors to work together to identify job-share and exchange opportunities, and develop and recognize competency-based skill sets across locations and businesses.

- 4.2.1 Bring together industry sectors (e.g. hospitality, wine and regional eco-tourism accommodation) to encourage tourism business clusters or a business-buddy system.

Strategy 4.3: Undertake career progression modeling across a range of sectors within the tourism industry, including tourism-specific, retail and hospitality.

- 4.3.1 Produce business toolkits on how to use competency-based skill sets and non-linear career pathways to attract and retain workers from range of groups e.g. mature-aged, entry-level, and immigrants.

12.5 ENHANCING SKILLS

A major finding of both the quantitative and qualitative surveys undertaken for this project and confirmed by the Minister's Tourism Round Table was that there was strong industry preference for deploying training resources for on-the-job multi-skill training, rather than centralized training. This training is required for both employees (job skills) and employers (business skills).

However, while Government subsidy is available for accredited courses, TAFE has to charge full rates for the kind of short courses and workshops, which the industry is demanding. The industry is hopeful that the Government will assist by part-subsidising such courses.

Cadetships and apprenticeships are not commonplace within the tourism industry. Those that exist generally are linked to the more technical skilled areas with hospitality (e.g. chefs). The industry has a lower number of traineeships and apprenticeships than more technical (trade) industries such as construction, mining and defence.

As apprenticeships are not common within the industry it has also been suggested that 'on-the-job' training should occur through a mixed mode delivery. This would involve on-the-job skills upgrades, followed by the acquisition of higher-level skills and knowledge and qualifications, as they are required.

However, the tourism industry in South Australia is characterised by a high percentage of micro-businesses (less than 4 employees). This suggests that the number of self-employed in the industry is also likely to be high³⁴.

The industry undervalues the need to invest in training or to recognise prior learning. Industry feedback suggests that the reasons for this are similar across the industry and are not limited to South Australia. Barriers to achieving on-the-job training in addition to those identified in the recruitment and retention sections include:

- Participation rates in tourism and hospitality training is low due to limitations of time and the difficulty encountered in releasing employees for training. This is compounded by the need to travel off-site to access training and affordability issues. Regional areas in particular struggle with this issue
- Many operators are reluctant to invest in seasonal training for casual or part time employees or those in jobs with a high history of staff turnover
- Industry knowledge of the education and training system is limited³⁵
- The more skilled employers are, the higher the likelihood they will recognise pre-employment qualifications
- There is no single comprehensive source of information on training opportunities or training rewards available to industry or prospective employees
- Small businesses generally have limited capacity to commit to mid-career training or professional development that assists in growing and building satisfying careers for employees
- Most operators have a tendency to focus on 'day to day' management of businesses
- Most owner / managers / operators felt that training themselves is worthwhile but not easily accessible
- There is a lack of human resource management and business skills among employers (both large and small), particularly in recruiting, inducting and re-training of staff.

³⁴ BTR Occasional Paper, VBCS research, SATC Business Demand Survey

³⁵ National Skills Shortage Strategy indicating that only 15% of those surveyed were familiar with the training system. Industry consultation supported this fact.

There is little research on the skill levels of owners, operators and managers within the industry. Industry feedback mainly within the hospitality sectors (hotels and catering) has identified owner/manager skill levels as being a significant issue. The mixed mode form of training delivery could also apply to business owners and operators. An audit is required to ensure that the regional technological infrastructure exists to deliver programs (where important infrastructure is lacking partnerships should be explored (e.g. TELSTRA).

While the TO.BE website has been developed to provide access and information on courses, industry feedback suggests that there is limited updating, promotion, understanding and industry uptake of this training information.

The National Tourism Accreditation Program, as a business management tool and measure of quality assurance, is an indicative, but important guide for judging the skill level of business owners and operators. Currently, there are less than 30% of operators accredited within South Australia.

OBJECTIVE 5:

DELIVER TRAINING FOR CONTINUOUS IMPROVEMENT IN SKILLS FOR EMPLOYEES AND EMPLOYERS CONSISTENT WITH INDUSTRY NEEDS

Employees

Strategy 5.1: Continue to encourage and facilitate access to flexible training arrangements within the workplace

- 5.1.1 Conduct an audit to determine the degree of on-the-job, multi-skilling and simulated training delivered by Schools, TAFE SA and Universities.
- 5.1.2 Encourage change within TAFESA to support 'case management' models to shift training from centralised institutions to on-time 'on-job training' within enterprises and businesses. (Increase emphasis on obtaining supervisory or management training only after achievement of a level of industry experience).

Strategy 5.2: Support new delivery models that effectively meet education and training needs in regional tourism areas

- 5.2.1 Investigate opportunities to use seminar, workshop, classroom, video conferencing, online and other flexible delivery modes to overcome the cost effectiveness difficulties.
- 5.2.2 Actively encourage providers of tourism training to promote industry placements to 'remote' tourism businesses where skills and labour shortages have been identified as a priority (Flinders and Outback, Eyre Peninsula or Kangaroo Island).
- 5.2.3 Prepare regional registers of training and education that will support the development of sector experiences such as food and wine, nature, culture and adventure (sport) and identify how to fill any training and education gaps.
- 5.2.4 Negotiate to have short courses designed to meet the needs of the tourism industry to be eligible for Government subsidies as are full time courses.

Strategy 5.3: Support and extend the 'Appetite for Success' program to key occupational areas within the tourism industry.

- 5.3.1 Identify tourism businesses willing to participate in the 'Appetite for Success' within the tourism industry. (This program currently provides on-the-job case management / mentoring for those studying cookery to address the low retention rate in the hospitality sector).

Employers

Strategy 5.4: Continue to provide, facilitate and promote a range of networking, training, mentoring and business development information and opportunities specifically to cater for tourism businesses.

- 5.4.1 Re-invigorate the TO.BE website and prepare a marketing and sponsorship plan to ensure greater use of this tool.

Strategy 5.5: Raise tourism businesses' awareness of training and the benefits of integrating flexible employment and workforce planning into business practices.

- 5.5.1 Produce tourism-specific business tool-kits (templates, self-education exercises, checklists) to allow practical application rather than as a generic business tool. (Use the revitalised TO.BE website to disseminate information).

Strategy 5.6: Strengthen human resource management practices and customer service excellence within the National Tourism Accreditation Program.

- 5.6.1 Include continuous learning in human resource management practices as a pre-requisite of Section 5 in the Accreditation Program.
- 5.6.2 Strengthen benchmarking for customer service excellence into the National Tourism Accreditation Program.
- 5.6.3 Consider including recognition points within the Tourism Awards and National Tourism Accreditation Program for tourism businesses that invest in training to improve workplace practices (including work experience).

Strategy 5.7: Liaise with non-tourism specific organisations to ensure that tourism businesses can capitalize on business development training and mentoring opportunities.

- 5.7.1 Source information on what resources and training is available through non tourism-specific organisations such as DTED, DTIR, BECS, ACCs and RDBs (Use the TO.BE website to disseminate this information).

Strategy 5.8: Conduct a skills audit / training needs analysis on Aboriginal tourism businesses to provide an indication on skills gaps within this sector.

- 5.8.1 Provide an indication of the 'skills gap' within the Indigenous tourism sector by working with Iga Warta, Coorong Wilderness Lodge, Pomeruk Aboriginal Cultural Centre, Aboriginal Cultural Tours, Bookabee Cultural Tours and Services and Head of Bight businesses by conducting an audit.

12.6 INDUSTRY WORKFORCE TRACKING AND MONITORING

Measuring industry workforce performance is crucial for the tourism industry to effectively plan for the future. This will help it to find productive ways to invest in its human capital. Consistently monitoring the industry needs helps to identify skills gaps before they become serious shortages.

The tourism industry in South Australia does not currently have economic or workforce forecasting capabilities. Nor does it have consistent or sustained monitoring in place specifically to track graduates of tourism or hospitality courses.

The complexity and range of market and industry drivers means that there is likely to be an increased need to articulate, review and improve the current structures and mechanisms in place to identify and address the tourism industry's future workforce skills needs on an on-going basis.

This means that there will be a greater need for more strategic workforce planning tools and more effective information dissemination into the industry to accommodate a broad range of understanding and expertise.

A number of industries have commissioned NCVER to conduct a range of industry specific surveys. However, to date there has been no tourism or hospitality specific surveys conducted other than those indicative surveys undertaken for the purpose of this study.

With the advent of on-line on-time technology the opportunity exists to create data series that provide an up to the minute picture and forward intentions of the workforce needs in the industry e.g. by using mechanisms like the Industry Performance Analyser Tool (IPAT).

Monitoring and tracking helps ensure that the use of resources is efficient and avoids duplication. Together they can assist the industry in being more dynamic and responsive, allowing it to become more competitive and sustainable in the long term.



OBJECTIVE 6: IMPROVE THE CAPACITY OF THE TOURISM INDUSTRY TO PLAN FOR FUTURE WORKFORCE NEEDS THROUGH RELEVANT RESEARCH AND MONITORING

Strategy 6.1: Improve tourism employment forecasting techniques

- 6.1.1 Ensure that the state-based Tourism Satellite Accounts are updated periodically to provide the benchmark for forecasting working work.
- 6.1.2 Develop working partnerships with universities that specialize in labour market analysis to assist with workforce planning.

Strategy 6.2: Create an on-going system to track tourism students throughout their careers

- 6.2.1 Create a tracking system for a web-based employment register that can be used as a career pathway in which graduates can register for employment. (Industry should also be able to place requirements on the database.

Strategy 6.3: Identify and monitor the key expected skill and labour shortages within the major tourism occupations.

- 6.3.1 Investigate the feasibility of NCVER developing and conducting workforce needs surveys linked to the tracking system referred to in Strategy 6.2.
- 6.3.2 Investigate the extensive use of the on-line Industry Performance Analyser Tool (I.P.A.T) as a means of acquiring industry employment gaps and intention data.
- 6.3.3 In the longer term produce an Annual Tourism Skills Report Card.
- 6.3.4 Use the information provided in the Tourism Skills Report Card to assist education and training providers such as TAFE SA to determine the requirement to conduct regionally based training.

Strategy 6.4: Update strategic tourism plans to reflect the significance of workforce planning by the tourism industry.

- 6.4.1 Use the Tourism Skills Report Card as a performance indicator the 'skill of the tourism industry workforce' in future state tourism plans.
- 6.4.2 As more understanding and information becomes available consider workforce planning issues in more detail in future revisions of regional strategic tourism plans.

Strategy 6.5: Use case management workforce models to ensure responsiveness to private sector investment in major tourism developments, particularly within regional areas.

- 6.5.1 Monitor key tourism and tourism-related projects and initiate early planning for major workforce demand situations (cf Adelaide Airport Terminal, Port Lincoln Hotel etc).

13.0 KEY STAKEHOLDERS

THE CREATION OF A HIGHLY SKILLED WORKFORCE IS A SHARED RESPONSIBILITY INVOLVING A WIDE RANGE OF STAKEHOLDERS INCLUDING BUSINESSES, INDIVIDUALS, UNIONS, INDUSTRY SECTOR ASSOCIATIONS, EDUCATIONAL INSTITUTIONS AND TRAINING PROVIDERS, REGIONAL DEVELOPMENT ORGANIZATIONS AND GOVERNMENT AGENCIES AT COMMONWEALTH AND STATE LEVELS.

These major players must work collaboratively to ensure that South Australia's tourism workforce is highly skilled and able to compete in the global economy. The following provides an outline of the key roles of these stakeholders and programs in relation to workforce planning.

COMMONWEALTH

Department of Education, Science and Training (DEST)

The Department advises and implements policies that seek to ensure the continued relevance of education, science and training to current and future needs, and to meet the growing requirement for lifelong learning.

Department of Industry, Tourism and Resources (DITR)

The role of the Department is to strengthen industry resilience and help position Australia as a destination by delivering a range of policies and programs that identify and address impediments to growth and maximize yield. DITR works within the context of the tourism policy framework outlined within the Tourism White Paper.

Technical and Further Education (TAFE)

TAFE is a key provider of adult education courses in Australia. TAFE provides practical skills and training (vocational) courses connected with industries and areas of work, to help people enter or re-enter the workforce. They also provide people with an alternative education pathway through to universities.

Department of Employment and Workplace Relations (DEWR)

DEWR undertakes training and demand assessments at the local level by engaging with industries to develop strategies that match industry and job seeker needs. DEWR also develop specifically targeted industry strategies aimed at linking Indigenous communities that have high levels of unemployment with regional industries.

Career Advice Australia (CAA)

CAA is a DEST Skills for the Future initiative. CAA provides young people aged between 13-19 with a career and transition support network from school to further study, or from school to work. It provides access to professional career advice, industry placements and facilitates programs such as Adopt-a-School.

STATE

Employee and Employer Associations

Employee and Employer Associations are collective advocacy groups that represent members in industrial relations matters. The principal role of these associations is to encourage better working conditions, often through collective bargaining and to advance the interests of the industry and its members.

Economic Development Board

The Economic Development Board (EDB) is the SA government's key advisory body on economic development issues in South Australia. The EDB provides high level strategic and policy advice to Government on economic development and industry issues and works in partnership with the private sector to facilitate and promote economic development, ensure the business environment and infrastructure is competitive, promotes innovation, education and skills, and encourages private sector investment.

Department of Trade and Economic Development (DTED)

DTED provides and implements high level economic development strategy and policy through a whole-of-government coordinated approach. DTED also facilitates the development of major projects of strategic significance to the State and the provision of selected business extension services identified as providing a significant net benefit to the State's economy.

Training and Skills Commission

The Training and Skills Commission was established in 2003 in response to the Training and Skills Development Act 2003. The role of the Commission is to assist, advise, and make recommendations to the Minister for Employment, Training and Further Education on matters relating to higher education, vocational education and training and adult community education. Reference Groups support the Commission by providing advice in these key areas.

Food, Tourism and Hospitality Industry Skills Advisory Council, FTHISAC

FTHISAC is one of nine industry skills councils within South Australia. The FTHISAC works with government to develop workforce plans, identify trends and emerging skill needs and to consider issues relating to career advice and the attraction and retention of a skilled workforce for the food, tourism and hospitality industries.

Secondary Schools

Secondary schools play a key role in developing the capabilities of young people to confidently and productively engage in society. Secondary education provides the transition stage for students into employment or higher education.

Council of Australian Secondary Tourism Teachers (CASTT)

CASTT (SA chapter) is the professional association for secondary school teachers of tourism and hospitality. The role of CASTT is to represent its collective membership; and to facilitate information dissemination and co-operation between them, industry bodies, post secondary educators and trainers.

TAFESA

TAFESA is the largest provider of vocational education and training in South Australia.

Higher Education

Higher education in Australia refers to education at degree level and above. Three public universities and over twenty private providers in South Australia deliver higher education.

South Australian Tourism Commission (SATC)

The role of the SATC is to help grow the tourism industry within South Australia by productively promoting the best it has to offer within intrastate, interstate and international visitor markets.

Department of Education, Further Education, Employment, Science and Technology (DFEEST)

DFEEST provides government advice on skill formation, employment, research, technology and innovation and further education to underpin economic development and social inclusion within South Australia. The core focus of DFEEST is on providing strategic and policy advice and building the research and innovative capacity of vocational education and training, community education and higher education. It manages TAFE SA and contributes to Education Adelaide, and is the government interface between industry and commerce on training matters.

Private Training Providers

Private training organisations offer a wide range of accredited and non-accredited vocational educational and training courses across the full range of Australian Qualifications. Private training providers can provide specialised courses for various industry sectors. Private training providers can also be accredited to deliver higher education courses and offer courses that are an equivalent standard to those offered by public universities.

REGIONS

Regional Employment and Skills Formation Networks

South Australia has seventeen (17) regional employment and skills formation networks. The role of these networks is to provide regional communities with the capacity to identify and respond to their current and emerging employment and training needs. The Networks are integrated and co-located with Regional Development Boards and are supported by regional teams operating out of DFEEST and have locally based regional co-ordinators employed by DFEEST.

Regional Development Boards (RDBs)

South Australia has 13 Regional Development Boards supported financially by State and Local Government. The role of RDBs is to build individual region's community, business and economic capacity, improve co-ordination of government initiatives and programs and facilitate collaboration, communication and cooperation between stakeholders.

Office of Regional Affairs (ORA)

ORA provides the principal point of liaison between the Government and each of the State's 13 Regional Development Boards.



APPENDIX 1: SA INDUSTRY ORGANISATIONS / ASSOCIATIONS

THE FOLLOWING IS A LIST OF KNOWN TOURISM INDUSTRY RELATED OR RELEVANT ORGANISATIONS THAT WERE ACTIVE IN 2004.

Australian Amusement, Leisure and Recreation Association	National Trust of SA
Australian Association of Convention Bureaus	Pacific Asia Travel Association
Australian Federation of Travel Agents	Passenger Vehicles Association
Australian Hotels Association (SA Branch)	Retail Traders' Association
Aboriginal Tourism Australia	Restaurant and Catering SA
Australian Tourism Export Council	Royal Automobile Association
Australian Wine and Brandy Corporation	SA Backpackers Industry Association
Boating Industry Association of SA Inc	SA Bed and Breakfast Town and Country Association
Bus and Coach Association	Business SA
Camping Association of SA	SA Farmers Federation
Caravan Parks Association of SA Inc	SA Farm and Country Holidays Association
Caravan and Camping Industries Association of SA	SA Restaurants Association
Caravan Clubs Association (SA Branch)	SA Tourism Accreditation Board
Ecotourism Association of Australia	SA Wine and Brandy Industry Association Inc
Hotel, Motel and Accommodation Assoc of Australia Inc	Small Retail Association of SA
Houseboat Hirers' Association Inc	South Australian Taxi Association
Institute of Australian Tourist Guides	South Australian Tourism Alliance
Licensed Club's Association of SA	Food, Tourism and Hospitality Industry Skill Advisory Council
Licensed Chauffeured Vehicles Association	Wine Makers' Federation of Australia
Meetings Industry Association of Australia (SA Branch)	Wine Tourism Advisory Board

APPENDIX 2: TOURISM WORKFORCE STRATEGY – IMPLEMENTATION ACTION PLAN

THIS IMPLEMENTATION ACTION PLAN PROVIDES A FRAMEWORK FOR IMPLEMENTING CHANGE. AS WITH EVERYTHING, CHANGE WILL BE A GRADUAL PROCESS. SOME RECOMMENDED ACTIONS ARE ACHIEVABLE IN THE SHORT-TERM OTHERS WILL TAKE LONGER. TO HELP IN 'KICK-STARTING' THE PROCESS, AND IN CONSULTATION WITH THE WORKING GROUP, A NUMBER OF THESE RECOMMENDED STRATEGIES HAVE BEEN HIGHLIGHTED AS PRIORITIES AS SUCH (P).

OBJECTIVE 1:					
Ensure a co-ordinated approach to workforce planning and provide an effective business support network					
	Strategies and Actions	Key Driver	Partners	Resources	Notes
Strategy 1.1: Create a viable representative industry entity with the professional capacity and capability to identify and articulate the workforce planning and development needs of all tourism-specific sectors within the industry (P) (Including establishing a partnership between key tourism-specific education and training providers and industry stakeholders and promoting a range of networking, training, mentoring and business development information and opportunities specifically to cater for tourism businesses).					
1.1.1	In the short-term, employ or second a co-ordinator to initiate partnerships and priority actions from this Tourism Workforce Development Strategy.	SATC	Tourism Industry Body	Within existing resources	
1.1.2	Investigate viable long-term options that will lead to greater representation and self-reliance in the tourism industry and in the industry's capacity and capability in workforce planning.	Tourism Industry Leaders FTHISAC	Tourism Industry Associations SATC	Additional resources required	
OBJECTIVE 2:					
Deliver education programs to raise awareness of tourism and that will meet the needs of the industry.					
Strategy 2.1: Strengthen the secondary school curriculum to provide a realistic understanding and knowledge of the tourism industry (P)					
2.1.1	Create a curriculum resources package for all secondary teachers in which traditional numeracy and literacy activities in traditional subjects include tourism topics and examples. (The resource would be targeted at the secondary school year levels of years 8 to 10. Examples include: spreadsheet analysis of yield management within a hotel/airline as part of the maths curriculum. A literacy resource in which students are required to respond to letters of inquiry of a tourism nature as part of the English curriculum).	DECS	CASTT AISSA Catholic Education Tourism Industry Body SATC SSABSA Universities TAFE SA	DECS – Budget	
2.1.2	Identify an industry representative to support the current web based resource centre for secondary school teachers (and others) to ensure consistent, relevant and up-to-date materials (brochures, newsletters, statistics, etc) are available for tourism and hospitality course contents.	SATC	Tourism Industry Body SATC CASTT Individual Schools – (teaching tourism)	Some additional resources	

	Strategies and Actions	Key Driver	Partners	Resources	Notes
Strategy 2.2					
Establish partnerships to improve industry engagement and recognition at the secondary and tertiary levels					
2.2.1	Develop a formalised mentoring system linking education at all levels to 'mentors' from the industry.	Tourism Industry Body	SSABSA CASTT SATC Universities TAFE SA Regional Marketing Committees	Additional resources required	
2.2.2	Work with CASTT to develop a resources kit that supports and guides industry mentors and presenters within the secondary school system.	Tourism Industry Body	CASTT SSABSA SATC Universities TAFE SA Regional Marketing Committees	Additional resources required	
2.2.3	Work with CASTT to include tourism as part of a professional development program supported by a recognised Tourism Teacher Award.	Individual Universities & TAFEs	CASTT SSABSA SATC Universities TAFE SA Regional Marketing Committees	Additional resources required	
2.2.4	Develop a work experience program aimed at year 10 and year 12. Support this program with an active database of industry participants and a resources kit that includes case studies defining both industry and student expectations during this work experience placement.	Tourism Industry Body	SSABSA CASTT DECS SATC Universities TAFE SA AISSA Catholic Education Regional Marketing Committees	Additional resources required	
2.2.5	Encourage greater involvement and support and possibly sponsorship from industry for TAFE SA's and Universities' curriculum development and course structure, as well as graduation ceremonies, dinners and functions.	Tourism Industry Body	SATC TAFE SA Individual Universities and TAFEs	Some additional resources Maybe cost recoverable Notable time commitment from partners	
2.2.6	Develop a State 'Best Tourism Student' Award at the tertiary level that has a focus on customer service excellence. Collate and publicise existing industry sponsored prizes (e.g. graduation prizes). (The industry can reward excellence with either employment or visitor experience opportunities.)	Individual Universities & TAFEs	Tourism Industry Body SATC TAFE SA Individual TAFEs	Some additional resources Maybe cost recoverable Notable time commitment from partners	

	Strategies and Actions	Key Driver	Partners	Resources	Notes
2.2.7	Encourage the appointment of persons with tourism knowledge on to other key SSABSA, TAFESA and University Advisory Committees to maintain and enhance the profile of tourism.	Tourism Industry Body	SSABSA SATC CASTT DECS TAFE Universities	No additional resources	
2.2.8	Identify ways to include effective information on study pathways in tourism and hospitality courses for post-secondary level study.	Tourism Industry Body	CASTT, SSABSA, DECS, AISSA, Catholic Education, Flinders University, UniSA, TAFESA Private RTOs	Some additional resources	

OBJECTIVE 3:

Position tourism as a career of choice to targeted sectors of the current and future labour market and promote career opportunities accordingly

Strategy 3.1:

Determine best fit 'segments' within the current and future labour markets and promote these segments.

3.1.1	Commission research to define the best labour market prospects to fit the current and future tourism industry	Tourism Industry Body	SATC	Additional resources required	
3.1.2	Develop a register for industry representation at career expos and school, TAFE and Universities' career days. [Develop materials that are user friendly (e.g. web-based, glossy brochure) for young people to access as they are undertaking their personal learning plans].	Tourism Industry Body	SSABSA CASTT SATC Universities TAFE SA Regional Marketing Committees	Additional resources required	
3.1.3	Seek synergies with emerging industries such as mining and defence (i.e. to promote employment of spouses of workers in these industries).	Tourism Industry Body	DTED	No additional resources	

Strategy 3.2:

Promote the industry experience (skills gained) of students and/or past students and employees to provide a realistic understanding of career and employment opportunities (P)

3.2.1	Coordinate the development of a database of recent graduates of tourism and hospitality courses and industry representatives who are willing to participate in information sessions and subject delivery to realistically illustrate the employment outcomes and career opportunities that the tourism/hospitality industry can offer.	Tourism Industry Body	CASTT, TAFESA, University of South Australia Flinders University, Tourism and Hospitality sector organisations (e.g. AHA, AFTA, etc.) SATC	Some additional costs	
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Strategy 3.3:

Continue to advocate to the Federal Government for legislation that influences the industry's capacity to attract and retain employees.

3.3.1	Advocate amendments to the Migration Act to extend Student Visas to allow them to work in Australia.	Tourism Industry Body	SATC	No additional resources required	
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	Strategies and Actions	Key Driver	Partners	Resources	Notes
3.3.2	Establish more formal links with the Department of Immigration and Citizenship (DIAC) to promote tourism employment opportunities.	Tourism Industry Body	SATC Immigration SA DIAC FTH SC	No additional resources	
3.3.3	Liaise with DIAC to add more tourism classifications to the Skills Occupation List (SOL). These classifications should be updated according to identified skills or labour shortages as they arise.	Tourism Industry Body	SATC Immigration SA DIAC FTH SC	No additional resources	
3.3.4	Advocate for incentives that support suitably skilled people staying or moving to regional and remote areas. This may include tax benefits (particularly income) for workers who choose to move to these areas.	Tourism Industry Body	SATC DITR	No additional resources	
Strategy 3.4:					
Align the industry with Commonwealth and State employment initiatives to support participation by a broad range of social sectors					
3.4.1	Produce information that can advise the industry of the benefits of and programs available for employing mature workers, particularly female, the underemployed, sole parents re-entering the workforce from 1 July 2006 as a result of changes to sole parent benefit regulations and the opportunities that exist under current migration programs.	FTH Skills Council	Tourism Industry Body R&CA SA AHA Universities Schools TAFE SA DOME	Budget allocation or funding sources	
3.4.2	Promote seasonal employment opportunities available under the Working Holiday Makers Program to tourism industry operators.	DEWR	Tourism Industry Body FTH Skills Council	Budget allocation or funding sources	
Strategy 3.5:					
Support the implementation of the FTH Skills Council SHIFT.com website proposal.					
3.5.1	Once developed, discuss the type of marketing support that will assist tourism businesses accessing the FTH Skills Council SHIFT.com website proposal.	FTH Skills Council	Tourism Industry Body SATC	Additional resources required	
3.5.2	Develop an industry-endorsed skills template for tourism-specific sectors to add to this website.	FTH SC	Tourism Industry Body	Additional resources required	
OBJECTIVE 4:					
Develop strategies to improve retention and career pathways within the industry					
Strategy 4.1:					
Increase the capacity to up-skill when required and recognize prior learning as part of training processes (P)					
4.1.1	Undertake sector specific on-job on-time training after graduates gain employment.	TAFE SA	TAFESA, Private RTOs, Flinders University, UniSA, FTH SC	Re-allocation of budget with possible additional resources required	
4.1.2	Seek government assistance for shorter non-accredited tourism training to be either accredited or approved for funding support.	Tourism Industry Body	SATC TAFE SA FTHSC Universities Private RTOs	Some additional resources	

	Strategies and Actions	Key Driver	Partners	Resources	Notes
Strategy 4.2: Encourage industry sectors to work together to identify job-share and exchange opportunities and develop and recognize competency-based skill sets across locations and businesses					
4.2.1	Bring together industry sectors (e.g. hospitality, wine and regional eco-tourism accommodation) to encourage tourism business clusters or a business-buddy system.	Tourism Industry Body	SATC AHA R&CSA	Additional Resources Required	
Strategy 4.3: Undertake career progression modeling across a range of sectors within the tourism industry, including tourism-specific, retail and hospitality					
4.3.1	Produce a range of materials detailing career pathways in the SA tourism industry.	FTH Skills Council	Tourism Industry Body; industry sector associations	Additional resources or funding is required.	
OBJECTIVE 5: Deliver training for continuous improvement in skills for employees and employees consistent with industry needs					
Strategy 5.1: Continue to encourage and facilitate access to flexible training arrangements within the workplace (P)					
5.1.1	Coordinate an audit to determine the degree of on-the-job, multi-skilling and simulated training delivered by schools, TAFE SA and Universities.	Tourism Industry Body	FTH Skills Council TAFE SA	Some additional resources	
5.1.2	Encourage change within TAFE SA to support 'case management' models to shift training from centralised institutions to on-time 'on-job training' within enterprises and businesses.	TAFE SA	Tourism Industry Body FTH Skills Council TAFE SA	Some additional resources	
Strategy 5.2: Support new delivery models that effectively meet education and training needs in regional tourism areas					
5.2.1	Investigate opportunities to deliver on-line cost effective learning.	FTH Skills Council	TAFESA, Australian Rural and Remote Training Services (ARRTS) Universities Tourism Industry Body Private RTOs	Re- allocation of budget with possible additional resources required.	
5.2.2	Actively encourage providers of tourism training to promote industry placements to 'remote' tourism businesses.	TAFE SA	Tourism Industry Body, Industry Associations (e.g. AHA, AFTA, etc), UniSA, Flinders University, TAFESA and Private RTOs	Some additional resources	
5.2.3	Prepare regional registers of training and education that will support the development of sector experiences such as food and wine, nature, culture and adventure (sport) and identify how to fill any training and education gaps.	SATC	Individual Universities & TAFEs PIRSA RDB	To liaise - No additional resources required	

	Strategies and Actions	Key Driver	Partners	Resources	Notes
Strategy 5.3: Support and extend the 'Appetite for Success' program to key occupational areas within the tourism industry					
5.3.1	Identify tourism businesses willing to participate in the 'Appetite for Success' program within the tourism industry. This program currently provides on-the-job case management / mentoring for those studying cookery to address the low retention rate in the hospitality sector.	FTH Skills Council	Tourism Industry Body TAFESA	Budget allocation or funding sources	
Strategy 5.4: Continue to provide, facilitate and promote a range of networking, training, mentoring and business development information and opportunities specifically to cater for tourism businesses (P)					
5.4.1	Re-invigorate the TO.BE website and prepare a marketing and sponsorship plan to ensure greater use of this tool.	(SATC) Tourism Industry Body	TAFE SA Universities DTED RDB's Private RTOs	Budget allocation and additional resources required	
Strategy 5.5: Raise tourism businesses' awareness of training and the benefits of integrating flexible employment and workforce planning into business practices					
5.5.1	Produce tourism-specific business tool-kits (templates, self-education exercises, checklists) to allow practical application rather than as a generic business tool. (Use the TO.BE website to disseminate information).	FTH Skills Council	TAFE SA Universities Tourism Industry Body AHA R&CA - SA SATC	Additional resources and funding sources required.	
Strategy 5.6: Strengthen human resource management practices and customer service excellence within the National Tourism Accreditation Program					
5.6.1	Include continuous learning in human resource management practices as a pre-requisite of Section 5 in the Accreditation Program.	National Accreditation Program	SATC Tourism Industry Body DTIR	Additional Resources may be required	
5.6.2	Strengthen benchmarking for customer service excellence into the National Tourism Accreditation Program.	National Accreditation Program	SATC Tourism Industry DTIR	Additional Resources may be required	
5.6.3	Consider including recognition points within the Tourism Awards and National Tourism Accreditation Program for tourism businesses that invest in training to improve workplace practices (including work experience).	SATC National Accreditation Program	Tourism Industry Body DTED	No additional resources required	
Strategy 5.7: Liaise with non-tourism specific organisations to ensure that tourism businesses can capitalize on business development training and mentoring opportunities.					
5.7.1	Identify what resources and training are available through non tourism-specific organisations such as DTED, DTIR, BECS, ACCs and RDBs. Use the TO.BE website to disseminate this information.	Tourism Industry Body	FTH Skills Council SATC DTED	Additional resource commitment	

	Strategies and Actions	Key Driver	Partners	Resources	Notes
Strategy 5.8: Conduct a skills audit / training needs analysis on Aboriginal tourism businesses to provide an indication on skills gaps within this sector					
5.8.1	Provide an indication of the 'skills gap' within the Indigenous tourism sector by working with Iga Warta, Coorong Wilderness Lodge, Pomberuk Aboriginal Cultural Centre, Aboriginal Cultural Tours, Bookabee Cultural Tours and Services and Head of Bight businesses by conducting an audit.	Sustainable Tourism CRC	SATC DFEEST TAFE SA Individual Tourism Businesses: Iga Warta Coorong Wilderness Lodge Pomberuk Aboriginal Cultural Centre Aboriginal Cultural Tours Bookabee Cultural Tours and Services Head of Bight	Budget allocation or funding sources	
OBJECTIVE 6: Improve the capacity of the tourism industry to plan for future workforce needs through relevant research and monitoring					
Strategy 6.1: Improve tourism employment forecasting techniques					
6.1.1	Ensure that the State-based Tourism Satellite Accounts are updated periodically to provide the benchmark for forecasting work.	SATC	Sustainable Tourism CRC	Additional budget required	
6.1.2	Develop working partnerships with universities that specialise in labour market analysis to assist with workforce planning.	Tourism Industry Body	Sustainable Tourism CRC Universities	Seek existing resources	
Strategy 6.2: Create an on-going system to track tourism students throughout their careers (P)					
6.2.1	Create a tracking system for a web-based employment register that can be used as a career pathway in which graduates can register for employment (Link to SHIFT - see 3.5.1). Industry should also be able to place requirements on the database.	Tourism Industry Body	SATC NCVER Flinders University Adelaide University University of South Australia TAFE SA	Budget allocation or funding sources	
Strategy 6.3: Identify and monitor the key expected skill and labour shortages within the major tourism occupations					
6.3.1	Develop a basic workforce planning tool/template to assist industry at an industry and state level to assess workforce needs – this would form part of an annual business and human resource planning exercise	Tourism Industry Body	FTH Skills Council DECS SATC	Budget allocation or funding sources	

	Strategies and Actions	Key Driver	Partners	Resources	Notes
6.3.2	Investigate the extensive use of the on-line Industry Performance Assessment Tool (IPAT) as a means of acquiring industry employment gaps and employment intention data.	Tourism Industry Body	SATC Sustainable Tourism CRC	Part of broad tracking initiative	
6.3.3	In the longer term produce an Annual Tourism Skills Report Card.	SATC	Tourism Industry Body SATC DFEEST	Existing SATC research budget	
6.3.4	Use the information provided in the Tourism Skills Report Card to assist education and training providers such as TAFE SA to determine the requirement to conduct regionally-based training.	TAFE SA	DFEEST Universities Private Sector Training Providers	No additional resources	
Strategy 6.4: Update strategic tourism plans to reflect the significance of workforce planning by the tourism industry.					
6.4.1	Use the Tourism Skills Report Card as a performance indicator of the 'skill of the tourism industry workforce' in future state tourism plans.	Tourism Industry Body	SATC	No additional resources required	
6.4.2	As more information becomes available, consider workforce planning issues in more detail in future revisions of regional strategic tourism plans.	SATC	Regional stakeholders (Councils, RDBs etc)	No additional resources required	
Strategy 6.5: Use case management workforce models to ensure responsiveness to private sector investment in major tourism developments, particularly within regional areas (P)					
6.5.1	Monitor key tourism and tourism-related projects and initiate early planning for major workforce demand situations (cf Adelaide Airport Terminal, Port Lincoln Hotel etc.) [A three-year matrix identifying key tourism developments needs to be available as an ongoing planning tool].	Tourism Industry Body	FTH Skills Council Industry Associations	Within collaborative resources	

ABBREVIATIONS

South Australian Tourism Commission	SATC
Department for Further Education, Employment, Science and Technology	DFEEST
Food Tourism & Hospitality Industry Skills Advisory Council – South Australia	FTH SC
Area Consultative Committees	ACCs
Department of Employment and Workplace Relations	DEWR
Department of Trade and Economic Development	DTED
Department of Industry, Tourism and Resources	DITR
Regional Development Boards	RDBs
Technical and Further Education - South Australia	TAFE SA
Senior Secondary Assessment Board of South Australia	SSABSA
Council of Australian Secondary Tourism Teachers	CASTT
Department of Education and Children Services	DECS
Association of Independent Schools of South Australia	AISSA
University of South Australia	Uni SA
Registered Training Organisations	RTOs
Australian Hotels Association	AHA
Restaurant and Catering Association of South Australia	R&CA – SA
Tourism Operators Business Education	TO.BE
National Centre for Vocational Education Research	NCVER
Department for Immigration and Citizenship	DIAC
Australian Rural and Remote Training Services	ARRTS
Australian Federation of Travel Agents	AFTA
Sustainable Tourism Cooperative Research Centre	ST CRC