

TASMANIAN TOURISM AND HOSPITALITY INDUSTRY

Preliminary Workforce Audit



SIMPLIFYING GOVERNMENT

In association with:



Prepared for:

**Department of State
Growth**

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Executive Summary

Tasmania's tourism and hospitality industry is vital to the State's future economic sustainability. The industry is experiencing unprecedented strong growth, and aims to be generating a visitor expenditure of \$2.5 billion per annum by 2020, with a target of 1.5 million visitors. Progress towards this target is on track, with Tasmania attracting 1.15 million visitors in 2014-15, which is an 8 per cent increase on the previous year.

This growth needs to be supported by an expanded workforce which must be appropriately skilled to support the industry to deliver a quality product.

All participants in the industry – including the government, peak industry bodies and the education and training sector, have a role to play in achieving and maintaining a sustainable workforce that helps the industry achieve its full long term potential.

This preliminary workforce audit of industry workforce characteristics provides a baseline against which the Tasmanian tourism and hospitality industry can measure its progress. The audit makes a number of preliminary findings that will need to be considered during the development of a state-wide workforce development plan for the industry.

In particular, the state-wide plan will need to consider how the education and training sector can best support the industry during this critical growth phase. This preliminary audit suggests that there may be some problems in this area, particularly relating to the vocational education and training (VET) sector. Specifically, this preliminary audit finds there has been a significant decline in use of funded training places in the industry since 2013.

Given the rapid growth of the industry over this period, this suggests industry is not utilising nationally recognised training to the extent that it previously did. This raises the question whether the industry is employing other means of training its workforce, or whether it is simply focussed on recruitment and bypassing training. Regardless, such a situation is unlikely to be sustainable nor desirable into the future as the industry seeks to grow and improve the quality of the product it offers. Industry consultation is required to investigate this issue further.

The plan will provide a basis for the Tasmanian Government and the industry to collaborate to improve the capacity and quality of the industry's workforce into the future.

The key preliminary findings of this audit are outlined in Box ES-1.

Box ES-1: Summary of preliminary findings

Workforce size and composition

- The tourism and hospitality industry contribution to the Tasmanian economy and workforce as a whole has remained reasonably stable over the past eight years, with the workforce primarily in the following industry sectors:
 - Cafes, restaurants and takeaway food services;
 - Retail trade; and
 - Accommodation.
- Compared with Australia as a whole, Tasmanian tourism and hospitality businesses:
 - have a higher proportion of seasonal businesses;
 - employ less staff on average; and
 - employ a higher proportion of local residents and less interstate and international workers.

- It is estimated that:
 - The largest age group in the industry is workers aged between 20 and 29 years;
 - Sixty percent of the industry workforce is female; and
 - Around half of all workers in the industry are part time or casuals.

Labour and skill shortages

- Compared with Australia as a whole, Tasmanian tourism and hospitality businesses:
 - have a less transient workforce, with average turnover and vacancy rates being half those experienced nationally; and
 - experience lesser difficulties with recruitment, retention and workforce skills.
- There are identified shortages of chefs in regional areas of Tasmania, and recruitment difficulties for qualified and experienced pastry cooks for positions in small independent retail patisseries around the state.

Education and training

- Over sixty percent of the Tasmanian tourism and hospitality workforce does not hold formal post school level qualifications.
- Almost a third of the workforce hold vocational education and training qualifications (Certificate I through to Advanced Diplomas), and 6.5 percent hold bachelor or postgraduate degrees.
- While over 470 registered training organisations are listed as having the Tourism, Travel and Hospitality Training Package within their scope of delivery in Tasmania¹, only eighteen have an office or training facility in Tasmania.
- The industry is not utilising nationally recognised training to the extent that it previously did, with significant declines in the number of VET training places funded by government (excluding VET in Schools) between 2012 and 2015. This is evidenced by:
 - The number of students in training at TasTAFE decreasing by 23 percent; and
 - Training commencements funded through Skills Tasmania’s competitive tendering processes declining by 43 percent.
- The proportion of VET training places that is government funded has increased to two thirds since 2012.
 - Almost three quarters of TasTAFE training was undertaken in the North and South regions of the State.
- From 2012-2014, around half of VET training places funded through competitive tendering processes were undertaken in the south of Tasmania, but this declined to 35 percent in 2015.
 - The proportion of such training places delivered in Tasmania’s eastern region has remained stable at around 2-3 percent. The proportion in the northern region increased from 15 percent to 22 percent between 2012 and 2015, while in the north western region it increased from 33 percent to 42 percent over this period.

¹ As of June, 2016



- The number of commencements and completions of training contracts under the Tourism, Travel and Hospitality Training Package has decreased significantly from 2013 to 2015, with:
 - commencements declining by 13 percent; and
 - completions declining by 60 percent.
- The Certificate III in Commercial Cookery is the most popular qualification undertaken under a training contract, comprising 53 percent of training contract commencements in 2015.
- The Tourism, Travel and Hospitality Training Package was the most popular training package used in Tasmania for VET in Schools in 2014, with some 988 students being funded to undertake tourism, travel and hospitality training.

Labour and skill challenges

- The industry potentially faces a wide range of challenges related to two key areas:
 - Labour challenges - that relate to improving the supply of labour to the industry; and
 - Skill challenges - that relate to the skill of the industry's workforce.
- The relevance of the challenges and the strategies and actions that may be employed to resolve them should be addressed during the development of the state-wide workforce development plan for the tourism and hospitality industry.

1 Introduction

The tourism and hospitality industry is vital to Tasmania's future economic sustainability. The industry is experiencing unprecedented strong growth, supported by Tourism 21¹, which is a partnership between the Tasmanian Government and the Tasmanian tourism and hospitality industry. The vision for Tourism 21 is:

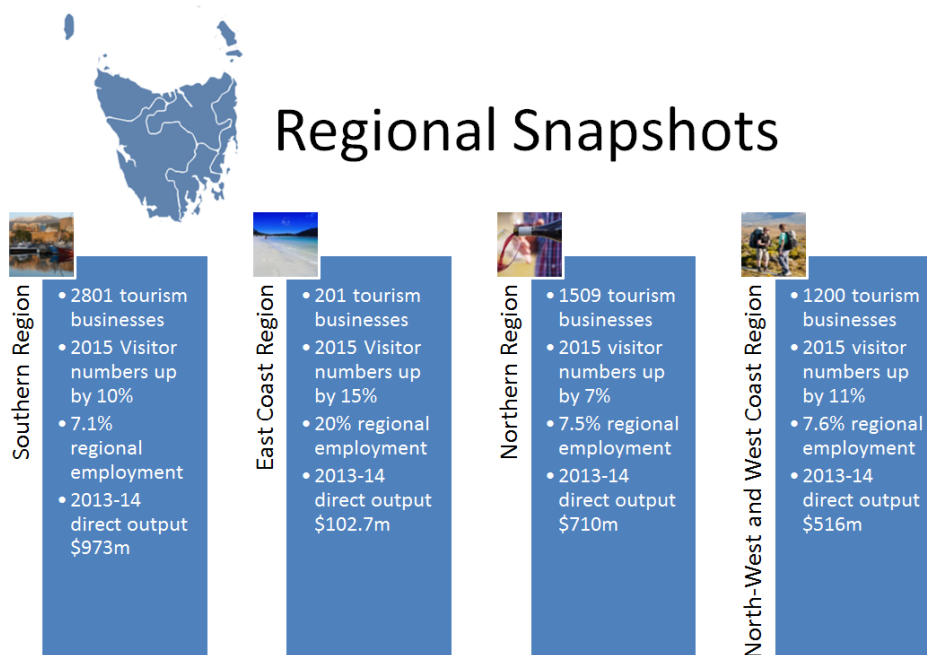
...Tasmania to be a world-leading destination of choice, with a vibrant visitor economy supported by our tourism and hospitality industries, strong business and education sectors and a community that embraces our visitors and all the benefits they bring.

Tourism 21 is articulated through the Tasmanian Visitor Economy Strategy 2015-2020, which has a target to grow annual visitor numbers to Tasmania to 1.5 million by 2020, and so generate a visitor expenditure of around \$2.5 billion per year². Progress towards this target is on track, with Tasmania attracting 1.15 million visitors in 2014-15, which is an 8 per cent increase on the previous year.³

From a workforce perspective, the Strategy sets the goal of increasing direct employment by the industry to 20 000 and indirect employment to 30 000 by 2020-21 (from the 2013-14 baseline of 15 000 direct and 22 500 indirect jobs). An assessment of progress against these targets is expected to be available in mid-2016.⁴

The broad scale of the industry across regions of Tasmania is shown in Figure 1.

Figure 1: Industry regional snapshots⁵



Along with the strong growth of the industry comes the need for an expanded workforce which must be appropriately skilled to support the industry to deliver a quality product. As outlined in the Strategy:

... there is a need to further build the state's reputation through ongoing commitment to quality assurance, enhancing the customer experience through a high quality workforce.

This is especially critical as the industry broadens into diverse new forms of tourism in reflection of evolving visitor demographics and demand. The State's growing reputation as a gourmet food and

wine destination, the pervasive ‘MONA effect’⁶ and investments in new tourism infrastructure are combining to build an impressive foundation for the island’s future tourism and hospitality industry.

One of the key actions identified in the Strategy is to ‘undertake a workforce audit and align workforce development programs with the needs of industry’.⁷

This preliminary workforce audit of the industry provides an overview of the Tasmanian tourism and hospitality industry workforce characteristics. It seeks to establish baseline data for workforce demographics, workforce availability, skills and training characteristics.

The audit will provide a foundation for the development of a workforce development plan for the Tasmanian tourism and hospitality industry. The workforce development plan will form the basis for the Tasmanian Government and the industry to collaborate on improving the capacity and quality of the industry’s workforce into the future.

1.1 Methodology

This preliminary audit analyses the tourism and hospitality industry workforce in terms of its:

- size and composition;
- labour and skill shortages;
- education and training characteristics; and
- labour and skill challenges.

Data used in compiling this preliminary audit has been collected from a variety of desktop sources, including:

- Australian Bureau of Statistics (ABS) 2011 Census data;
- Tourism Research Australia - Tourism Satellite Accounts (National and State Accounts); and
- Tourism Tasmania’s Economic Modelling Reports for Tasmania.⁸

An important limitation of this audit has been the data available on the industry through the ABS. The tourism and hospitality industry is not defined by the ABS as an industry per se. Rather, the ABS derives state level (but not regional) estimates of the tourism and hospitality industry by identifying how a range of industry sectors contribute to tourism-related activity. This is done through the Tourism Satellite Account Framework (TSAF).⁹

The industry sectors identified by the ABS as contributing to tourism related activity and the proportion of their contributions as used in the TSAF are shown in Table 1.

Table 1: Contributions of tourism characteristic industries as used by the ABS Tourism Satellite Account Framework

Tourism characteristic industries ¹⁰	Tourism contribution (%)
Accommodation	74.2
Ownership of dwellings	2.7
Cafes, restaurants and takeaway food services	28.2
Clubs, pubs, taverns and bars	22.7
Rail transport	6.5
Taxi transport	58.3
Other road transport	2.9
Air, water and other transport	54.2

Tourism characteristic industries ¹⁰	Tourism contribution (%)
Transport equipment rental	71.0
Travel agency and tour operator services	97.2
Cultural services	13.7
Casinos and other gambling services	9.7
Sports and recreation activities	15.4
Tourism connected industries	
Automotive fuel retailing	8.4
Other retail trade	8.1
Education and training	4.8

However, the TSAF does not provide estimates of a range of characteristics of the industry's workforce such as age, gender and type of employment. To overcome this, the preliminary audit has applied the TFAF (as shown in Table 1) to state-level ABS Census data to provide estimates for these workforce characteristics.

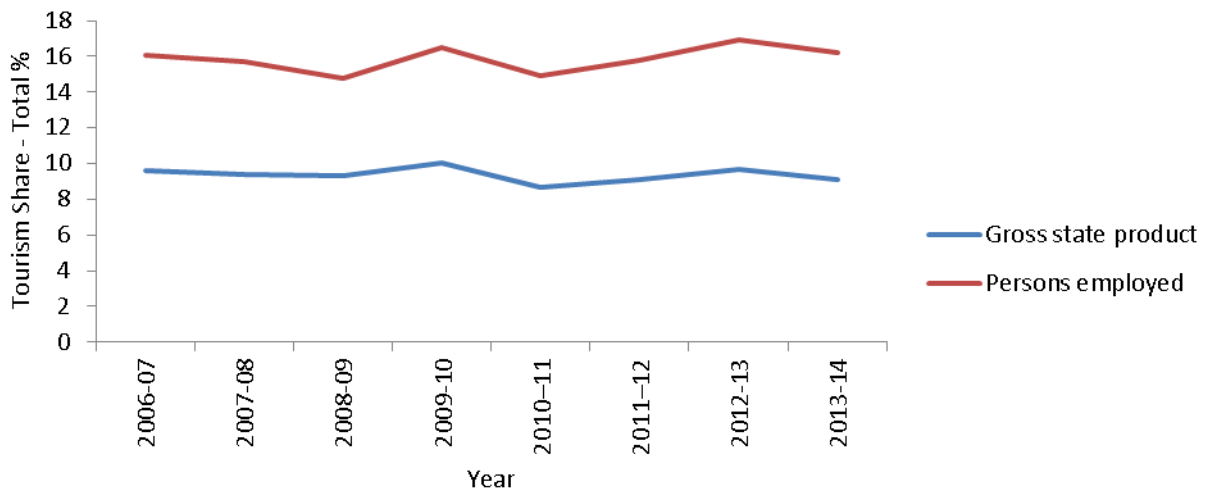
Of the industry sub-sectors, it is estimated that the hospitality sector accounts for over 70 percent of employment.¹¹ While hospitality is not confined to tourism related activity, for the purpose of this audit, *the tourism and hospitality industry* refers to hospitality industry activity and workforce as it pertains to tourism.

2 The tourism and hospitality industry workforce

2.1 Workforce size and composition

The tourism and hospitality industry contribution to the Tasmanian economy and workforce has remained reasonably stable over the past eight years, as illustrated by Figure 2.

Figure 2: Tourism and hospitality industry share of the Tasmanian economy and workforce, 2006 - 2014¹²



The tourism and hospitality industry in Tasmania is a key state employer, comprising 5711 businesses in 2013-14¹³ and employing an estimated 38,000¹⁴ people. The *Australian Tourism Labour Force Report*¹⁵ indicates that Tasmanian tourism businesses are mostly small, employing an average of nine employees, and that two thirds of Tasmanian businesses are seasonal.¹⁶

There are some key differences between tourism and hospitality businesses in Tasmania and Australia as a whole, as shown in Table 2:

- Tasmania has a higher proportion of seasonal businesses;
- Tasmanian businesses, on average, employ less staff; and
- Tasmanian businesses employ a higher proportion of local residents and less interstate and international workers.

Table 2: Comparison of the Tasmanian and Australian tourism and hospitality workforces¹⁷

Characteristic	Tasmania	Australia
Proportion of businesses identified as seasonal	69 percent	51 percent
Average number of employees	9	19
Employees who are local residents	90 percent	78 percent
Employees that are intrastate residents	6 percent	6 percent
Employees that are interstate Australians	2 percent	6 percent
Employees that are international	2 percent	10 percent

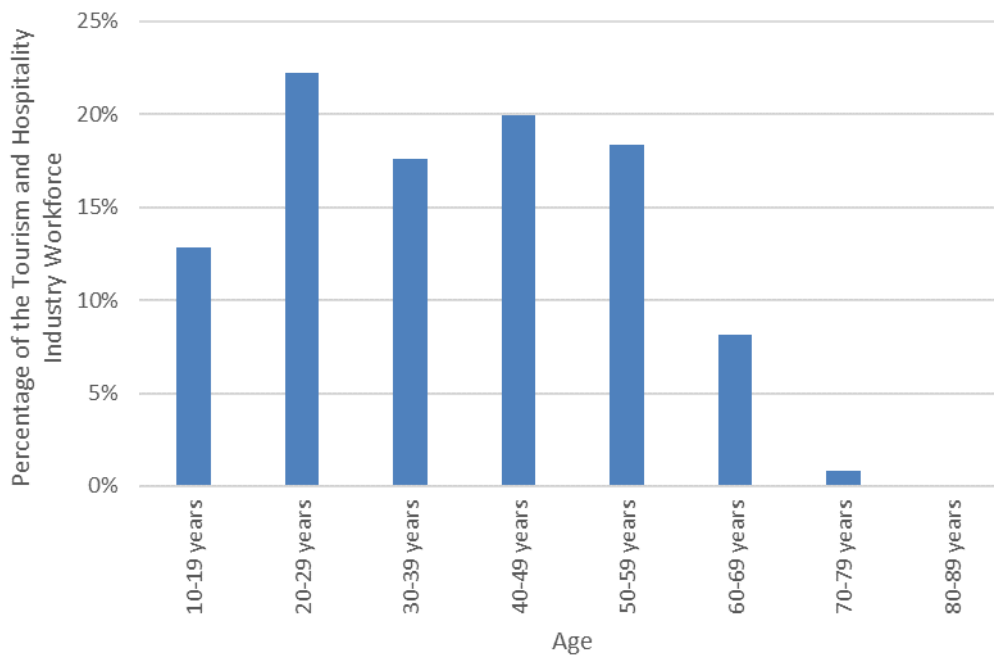
Tasmania's tourism and hospitality workforce availability is largely shaped by population demographics, characterised by concentrations in Hobart and Launceston and a small, highly dispersed population across the rest of the state.

Around 6.5 percent of the total Tasmanian workforce was employed in tourism-related industry activities in 2013-14, which represents a slight decrease since 2006-07. The primary industry areas of the Tasmanian tourism-related workforce include:

- Cafes, restaurants and takeaway food services;
- Retail trade; and
- Accommodation.¹⁸

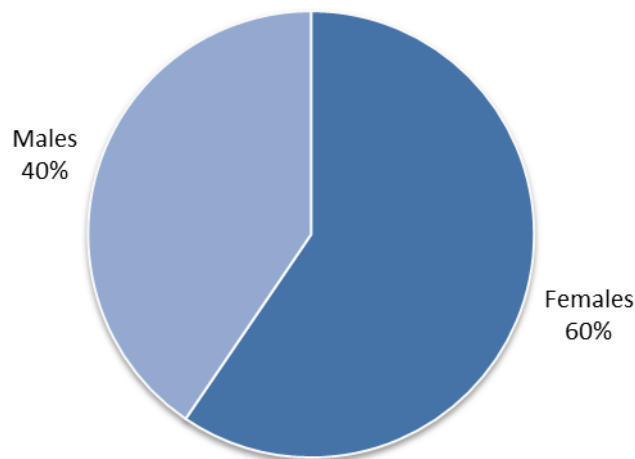
The largest age cohort of the industry is estimated to be workers aged between 20 and 29 years as shown by Figure 3. The age of workers in the industry is estimated to be relatively evenly dispersed between 30 and 60 years of age.

Figure 3: Age distribution of the Tasmanian tourism and hospitality industry workforce¹⁹



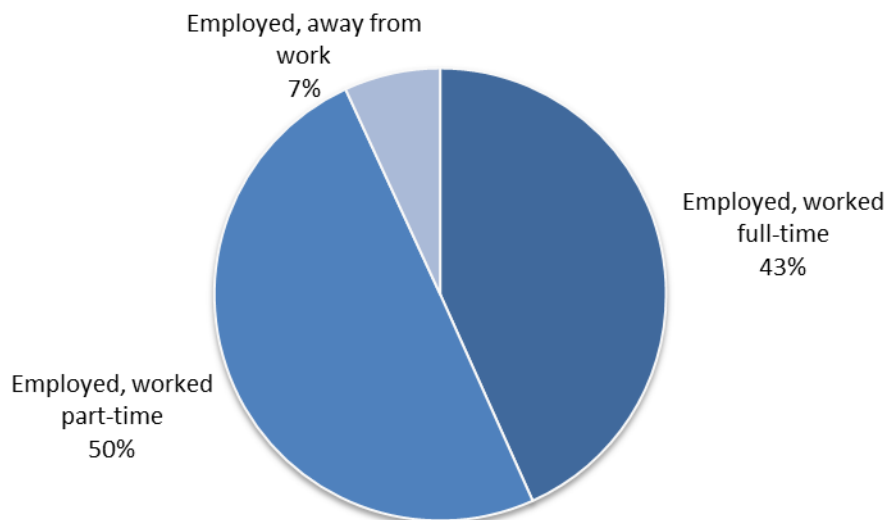
The industry workforce is estimated to comprise 60 percent female workers and 40 percent male, as shown by Figure 4.

Figure 4: Gender distribution of the Tasmanian tourism and hospitality industry workforce²⁰



Based on 2011 ABS Census data, it is estimated that half of workers in the Tasmanian tourism and hospitality industry work part-time or as casuals, as shown in Figure 5. Some 43 percent of the workforce is estimated to work full-time, with the remainder being out of the workforce at the time of the census.

Figure 5: Employment types of the Tasmanian tourism and hospitality industry workforce²¹



Preliminary findings

- The tourism and hospitality industry contribution to the Tasmanian economy and workforce as a whole has remained reasonably stable over the past eight years, with the workforce primarily in the following industry sectors:
 - Cafes, restaurants and takeaway food services;
 - Retail trade; and

- Accommodation.
- Compared with Australia as a whole, Tasmanian tourism and hospitality businesses:
 - have a higher proportion of seasonal businesses;
 - employ less staff on average; and
 - employ a higher proportion of local residents and less interstate and international workers.
- It is estimated that:
 - The largest age group in the industry is workers aged between 20 and 29 years;
 - Sixty percent of the industry workforce is female; and
 - Around half of all workers in the industry are part time or casuals.

2.2 Labour and skill shortages

The Tasmanian tourism and hospitality industry workforce is less transient than the other states, with half the national average turnover and vacancy rates, as demonstrated in Table 3. Compared to Australian businesses broadly, Tasmanian businesses have less difficulties with recruitment, retention and workforce skills.

Table 3: Selected workforce indicators - Tasmania and Australia compared²²

Workforce indicator	Tasmania	Australia
Industry turnover rate	32 percent	66 percent
Vacancy rate	3 percent	7 percent
Businesses identifying recruitment difficulty	31 percent	51 percent
Businesses identifying retention difficulty	24 percent	36 percent
Businesses identifying skills deficiencies in their workforce	59 percent	69 percent

Further, industry turnover decreased by 27 percent in Tasmania between 2011 and 2015, but increased by two percent Australia-wide (see Table 4).

Table 4: Industry workforce turnover – Tasmania and Australia compared²³

Tasmania		Australia	
2011	2015	2011	2015
59 percent	32 percent	64 percent	66 percent

Almost one third of Tasmanian tourism and hospitality businesses experience recruitment difficulties, the major reasons for these being employment conditions, skills and work experience. There is a current shortage in the Tasmanian tourism and hospitality industry of 407 workers.²⁴

The Tasmanian Skill Shortage list (updated in February 2016)²⁵ compiled by the Australian Department of Education and Training reports shortages of chefs in regional areas of Tasmania,

and recruitment difficulties for qualified and experienced pastry cooks for positions in small independent retail patisseries around the state.

Preliminary findings

- Compared with Australia as a whole, Tasmanian tourism and hospitality businesses:
 - have a less transient workforce, with average turnover and vacancy rates being half those experienced nationally; and
 - experiencing lesser difficulties with recruitment, retention and workforce skills.
- There are identified shortages of chefs in regional areas of Tasmania, and recruitment difficulties for qualified and experienced pastry cooks for positions in small independent retail patisseries around the state.

2.3 Education and training

Tasmania's capacity to cater for increasing visitor numbers and ensure the delivery of excellent visitor experiences is driven by the skills of the workforce.

The industry needs a skilled, flexible and dynamic workforce if it is to maintain its current rate of growth. As shown earlier (see Table 3), 59 percent of Tasmanian tourism and hospitality businesses have identified skills deficiencies in their workforce.²⁶

On average, 61 percent of the Tasmanian tourism and hospitality workforce do not hold post-school level qualifications. This is slightly above the Tasmanian population generally, where 59 percent do not hold post-school level qualifications.²⁷

Thirty-two percent of the tourism and hospitality workforce hold vocational education and training qualifications (Certificate I through to Advanced Diplomas), and seven percent hold bachelor or postgraduate degrees.²⁸

Nationally recognised vocational education and training for the tourism and hospitality industry is provided using a number of training packages, including the Tourism, Travel and Hospitality (SIT) Training Package. The national database of training and assessment resources and providers (www.training.gov.au) lists over 470² registered training organisations with delivery of the SIT training package in Tasmania as part of their scope of delivery.²⁹

Eighteen of these registered training organisations have an office or training facility in Tasmania. More information on these registered training organisations is provided in [Attachment A](#). Some of the larger organisations of these (those that deliver ten or more qualifications using the SIT Training Package) include:

- Ashley Institute of Training;
- Franklyn Scholar;
- Learning Partners Pty Ltd;
- MEGT Institute;
- Orange Vocational Education and Training;
- Outside the Square Solutions;
- Tasmanian Secondary Colleges; and
- TasTAFE.³⁰

Training and education pathways for the tourism and hospitality industry can involve participation through apprenticeships and traineeships, VET in Schools, off the job training, or training in the workplace.

Skills Tasmania administer funding for accredited training through a number of programs. These include apprenticeships and traineeships, subsidised training through TasTAFE and competitive tenders open to all other registered training organisations. Two thirds of this training was undertaken by TasTAFE in 2015, compared to just over sixty percent in 2012.

² As of June, 2016

Much of this training is through a 'deed' arrangement with Skills Tasmania. Table 5 illustrates that between 2012 and 2015:

- Almost three quarters of students in training were in the North and South of the State
- The numbers of students in training decreased by 23 percent between 2012 and 2015, with the majority of this decline occurring between 2012 and 2013.

Table 5: Students in tourism and hospitality industry training 2012 – 2015, TasTAFE³¹

Region	2012	2013	2014	2015	% Change
East	36 (2%)	15 (1%)	54 (4%)	19 (1%)	-47%
North	616 (35%)	439 (33%)	367 (27%)	402 (30%)	-35%
North West	403 (23%)	356 (27%)	291 (22%)	274 (21%)	-32%
South	686 (39%)	517 (39%)	630 (47%)	638 (48%)	-7%
TOTAL	1741 (100%)	1327 (100%)	1342 (100%)	1333 (100%)	-23%

Training commencements funded through Skills Tasmania's competitive tendering processes declined by 43 percent between 2012 and 2015, as shown in Table 6. Further:

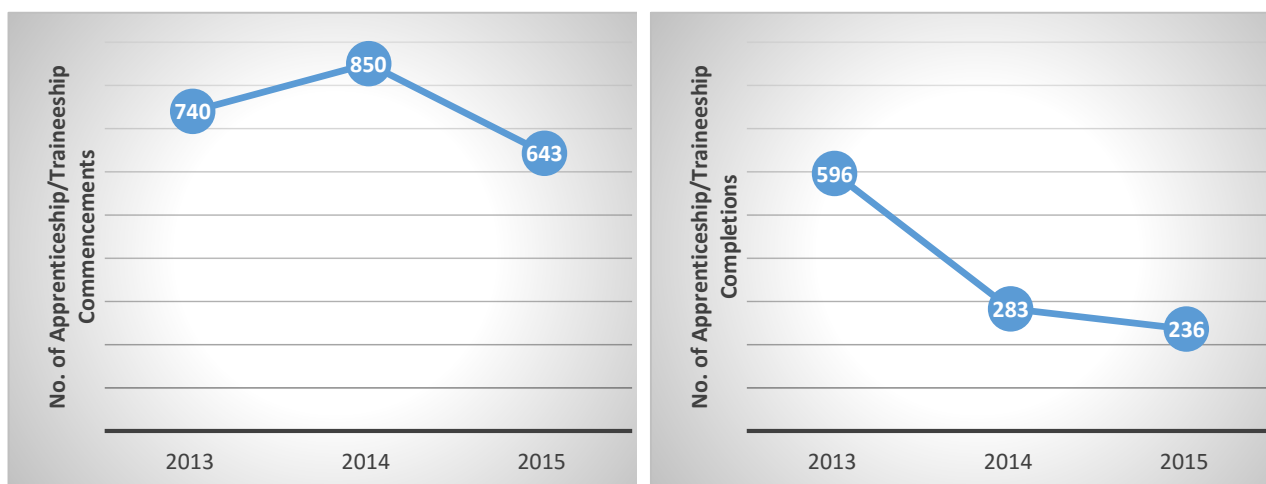
- Around half of the commencements were in the southern region of Tasmania between 2012 and 2014, but this declined to 35 percent in 2015.
- The proportion of commencements in the eastern region consistently represents around three percent, but declined to 2 percent in 2015.
- Commencements in the northern region increased from 15 percent to 22 percent between 2012 and 2015.
- Commencements in the north western region increased from 33 percent to 42 percent between 2012 and 2015.

Table 6: Commencements in tourism and hospitality industry training 2012 – 2015, competitive tendering³²

Region	2012	2013	2014	2015	% Change
East	29 (3%)	42 (3%)	34 (3%)	10 (2%)	-66%
North	173 (15%)	204 (16%)	212 (20%)	142 (22%)	-18%
North West	377 (33%)	430 (34%)	281 (26%)	270 (42%)	-28%
South	569 (50%)	601 (47%)	535 (50%)	227 (35%)	-60%
TOTAL	1148 (100%)	1277 (100%)	1062 (100%)	649 (100%)	-43%

Both the numbers of apprenticeships and traineeships undertaken in the tourism and hospitality industry decreased between 2013 and 2015 (refer Figure 6), with commencements declining by 13 percent and completions declining by 60 percent.³³

Figure 6: Apprenticeship and Traineeship commencements and completions 2013-15



It is important to note that training contracts completed in a particular year may have commenced in earlier years, as training contracts can take more than one year to complete. In light of this, comparison of commencement and completion figures for any single year is not meaningful.

The Certificate III in Commercial Cookery is the most popular qualification undertaken under a training contract³⁴, representing:

- 26 percent of training contract commencements in 2013;
- 38 percent of training contract commencements in 2014; and
- 53 percent of training contract commencements in 2015.

This certificate also had the highest number of training contract completions in 2014. The qualification with the highest numbers of completions for 2013 and 2015 was the Certificate III in Hospitality.³⁵

Tasmanian Senior Secondary Colleges offer VET in Schools programs using the SIT Training Packages. Of the 6100 student places funded for undertaking VET in Schools in Tasmania in 2014, some 988 undertook tourism, travel and hospitality related training. The SIT Training Package was the most popular training package used in Tasmania for VET in Schools in 2014.³⁶

Preliminary findings

- Over sixty percent of the Tasmanian tourism and hospitality workforce does not hold formal post school level qualifications.
- Almost a third of the workforce hold vocational education and training qualifications (Certificate I through to Advanced Diplomas), and 6.5 percent hold bachelor or postgraduate degrees.
- While over 450 registered training organisations are listed as having the Tourism, Travel and Hospitality Training Package within their scope of delivery in Tasmania, only eighteen have an office or training facility in Tasmania.
- The industry is not utilising nationally recognised training to the extent that it previously did, with significant declines in the number of VET training places funded by government (excluding VET in Schools) between 2012 and 2015. This is evidenced by:
 - The number of students in training at TasTAFE decreasing by 23 percent; and
 - Training commencements funded through Skills Tasmania’s competitive tendering processes declining by 43 percent.
- The proportion of VET training places that is government funded has increased to two thirds since 2012.
- Almost three quarters of TasTAFE training was undertaken in the North and South regions of the State.
- From 2012-2014, around half of VET training places funded through competitive tendering processes were undertaken in the south of Tasmania, but this declined to 35 percent in 2015.
 - The proportion of such training places delivered in Tasmania’s eastern region has remained stable at around 2-3 percent. The proportion in the northern region increased from 15 percent to 22 percent between 2012 and 2015, while in the north western region it increased from 33 percent to 42 percent over this period.
- The number of commencements and completions of training contracts under the Tourism, Travel and Hospitality Training Package has decreased significantly from 2013 to 2015, with:
 - commencements declining by 13 percent; and
 - completions declining by 60 percent.
- The Certificate III in Commercial Cookery is the most popular qualification undertaken under a training contract, comprising 53 percent of training contract commencements in 2015.
- The Tourism, Travel and Hospitality Training Package was the most popular training package used in Tasmania for VET in Schools in 2014, with some 988 students being funded to undertake tourism, travel and hospitality training.

2.4 Labour and skill challenges

The draft Tourism Employment Plan for the North West and West Coast of Tasmania (including King Island) identified a range of challenges facing the industry in that region.³ These challenges are likely to be just as relevant for the State as a whole.

The relevance of the challenges and the strategies and actions to be employed to resolve them will be addressed during the development of the state-wide workforce development plan for the industry.

Table 7 summarises the identified challenges according to two key focus areas:

- Those that relate to improving the supply of labour to the industry (Labour challenges); and
- Those that relate to the skill of the industry's workforce (Skill challenges).

The challenges are not listed in priority order.

Table 7: Current labour and skills challenges

Challenge	Description
Labour related	Addressing skill/labour shortages in specific occupations and during seasonal peaks
	Retaining skilled employees and trainees/apprentices
	Improving perceptions of the industry as a career choice
	Tapping into underutilised labour sources
	Establishing a pool of tourism and hospitality industry ambassadors
	Strengthening the workforce planning and development skills of operators
	Reducing transport barriers to employment
	Improving access to affordable housing/accommodation
	Reducing high labour costs (particularly penalty rates)
	Reducing the complexity of the regulatory environment for tourism and hospitality operators
Skills related	Strengthening partnerships between education and training providers and industry
	Ensuring that training programs are delivering the skills and competencies required by industry
	Improving awareness of and access to existing government skills and training programs
	Improving how Government sponsored employment programs service the industry
	Building specific skills to support emerging markets
	Developing the skills of employees, particularly in customer service
	Improving the job-readiness of University graduates for managerial-level positions

These challenges have been identified from a range of sources including:

- Australian Government's *Tourism 2020* strategy;
- Australian Tourism Labour Force Report 2015-2020;

³ This Tourism Employment Plan is an initiative of Tourism 2020 supported by the Australian Trade and Investment Commission and the Tasmanian Department of State Growth.

- Tasmanian's Tourism 21 - Tasmanian Visitor Economy Strategies 2015-2020;
- Destination Management Plans for the four Tasmanian regions; and
- Seven Tourism Employment Plans from other regions of Australia.

Preliminary findings

- The industry potentially faces a wide range of challenges related to two key areas:
 - Labour challenges - that relate to improving the supply of labour to the industry; and
 - Skill challenges - that relate to the skill of the industry's workforce.
- The relevance of the challenges and the strategies and actions that may be employed to resolve them should be addressed during the development of the state-wide workforce development plan for the tourism and hospitality industry.

Attachment A – Registered Training Organisations – SIT Training Package

Course name	Ashley Institute of Training	Franklyn Scholar	Guilford Young College	Industrylink Training	Institute of Project Management	Learning Partners Pty Ltd	MEGT Institute	National Joblink	Orange Vocational Education and Training	ORS Training Solutions	Outside the Square Solutions	Scala Institute	Skills Right Now P/L	Smart City Vocational College Pty Ltd	Tasmanian Secondary Colleges	TasTAFE	Work & Training Limited	Workforce Development	No. of Providers
SIT10213 - Certificate I in Hospitality				✓			✓								✓	✓			4
SIT10216 - Certificate I in Hospitality			✓	✓			✓								✓	✓			5
SIT20112 - Certificate II in Tourism						✓					✓				✓	✓			4
SIT20116 - Certificate II in Tourism			✓			✓					✓				✓	✓			5
SIT20213 - Certificate II in Hospitality	✓	✓				✓	✓	✓	✓	✓	✓		✓		✓	✓	✓		12
SIT20312 - Certificate II in Kitchen Operations	✓				✓	✓	✓		✓		✓				✓	✓	✓	✓	10
SIT20316 - Certificate II in Hospitality	✓	✓	✓			✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	15
SIT20416 - Certificate II in Kitchen Operations	✓		✓		✓	✓	✓		✓		✓				✓	✓	✓	✓	11
SIT30112 - Certificate III in Tourism						✓					✓				✓	✓			4
SIT30116 - Certificate III in Tourism															✓				1
SIT30216 - Certificate III in Travel		✓														✓			2
SIT30316 - Certificate III in Guiding																✓			1

Course name	Ashley Institute of Training	Franklyn Scholar	Guilford Young College	Industrylink Training	Institute of Project Management	Learning Partners Pty Ltd	MEGT Institute	National Joblink	Orange Vocational Education and Training	ORS Training Solutions	Outside the Square Solutions	Scala Institute	Skills Right Now P/L	Smart City Vocational College Pty Ltd	Tasmanian Secondary Colleges	TasTAFE	Work & Training Limited	Workforce Development	No. of Providers
SIT30513 - Certificate III in Guiding																✓			1
SIT30612 - Certificate III in Events																✓			1
SIT30616 - Certificate III in Hospitality	✓	✓		✓		✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	15
SIT30713 - Certificate III in Hospitality	✓	✓		✓		✓	✓		✓	✓	✓	✓	✓		✓	✓	✓		13
SIT30813 - Certificate III in Commercial Cookery	✓	✓		✓		✓	✓		✓		✓					✓	✓		9
SIT30913 - Certificate III in Asian Cookery	✓																		1
SIT31013 - Certificate III in Catering Operations	✓						✓									✓			3
SIT31113 - Certificate III in Patisserie	✓															✓			2
SIT31312 - Certificate III in Travel		✓														✓			2
SIT40112 - Certificate IV in Guiding																✓			1
SIT40212 - Certificate IV in Travel and Tourism		✓														✓			2
SIT40313 - Certificate IV in Hospitality	✓	✓				✓	✓		✓		✓		✓			✓	✓		9
SIT40413 - Certificate IV in Commercial Cookery	✓															✓			2
SIT40416 - Certificate IV in Hospitality	✓	✓				✓	✓		✓		✓					✓	✓	✓	9

Course name	Ashley Institute of Training	Franklyn Scholar	Guilford Young College	Industrylink Training	Institute of Project Management	Learning Partners Pty Ltd	MEGT Institute	National Joblink	Orange Vocational Education and Training	ORS Training Solutions	Outside the Square Solutions	Scala Institute	Skills Right Now P/L	Smart City Vocational College Pty Ltd	Tasmanian Secondary Colleges	TasTAFE	Work & Training Limited	Workforce Development	No. of Providers
SIT40713 - Certificate IV in Patisserie	✓																		1
SIT50112 - Diploma of Travel and Tourism		✓														✓			2
SIT50212 - Diploma of Events		✓														✓			2
SIT50313 - Diploma of Hospitality	✓			✓		✓	✓		✓		✓					✓			7
SIT50416 - Diploma of Hospitality Management	✓			✓		✓	✓		✓		✓					✓			7
SIT60112 - Advanced Diploma of Travel and Tourism																✓			1
SIT60212 - Advanced Diploma of Events																✓			1
SIT60216 - Advanced Diploma of Event Management																✓			1
SIT60313 - Advanced Diploma of Hospitality	✓					✓										✓			3
SIT60316 - Advanced Diploma of Hospitality Management	✓					✓										✓			3
Total	18	12	4	7	2	16	14	2	11	4	14	2	5	2	12	33	9	5	



Endnotes

- 1 [Tourism 21](#)
- 2 Tourism 21, [Tasmanian Visitor Economy Strategy 2015-2020](#)
- 3 [Tourism 21 Progress Report – May 2016](#)
- 4 This progress will be available with the release by the ABS of the 2014-15 Tourism Satellite Account figures in mid-2016.
- 5 Tourism Research Australia. [Tourism Region Profiles](#).
Tourism Tasmania, [Tasmanian Tourism Snapshot](#).
The Stafford Group, June 2013, [East Coast Destination Management Plan](#)
Tourism Northern Tasmania, 15 June 2015, [Northern Tasmania's Destination Management Plan 2015-17](#)
- 6 Destination Southern Tasmania, January 2014. [Destination Management Plan for Southern Tasmania](#)
- 7 Tourism 21, [Tasmanian Visitor Economy Strategy 2015-2020](#)
- 8 Tourism Tasmania, [Tasmanian Tourism Snapshot](#)
- 9 Australian Bureau of Statistics, *Australian National Accounts: [Tourism Satellite Account, 2014-15 Explanatory Notes](#)*.
- 10 A tourism characteristic industry is [defined](#) by the OECD as a 'group of establishments whose principal productive activity is a tourism characteristic activity. Tourism industries are the group of all tourism characteristic industries'.
- 11 Tourism Research Australia, [State Tourism Satellite Accounts, 2013-14](#).
- 12 Tourism Research Australia, Appendix: [State Tourism Satellite Accounts, 2013-14](#)
- 13 Tourism Research Australia. [Tourism Region Profiles](#)
- 14 Tourism Tasmania, [March 2016. Tourism Fast Facts](#).
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- 16 Australian Trade Commission, Austrade. October 2015, [Australian Tourism Labour Force Report: 2015-2020](#). P41.
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- 21 Australian Bureau of Statistics, Census of Population and Housing, 2011
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- 26 Australian Trade Commission, Austrade. October 2015. [Australian Tourism Labour Force Report: 2015-2020](#).
- 27 Labour and Skills Working Group and the Department of Resources, Energy and Tourism. [Australian Tourism Labour Force Report. Labour Force Profile \(Part 2\)](#).
- 28 Labour and Skills Working Group and the Department of Resources, Energy and Tourism. [Australian Tourism Labour Force Report. Labour Force Profile \(Part 2\)](#).
- 29 Note that not all those RTOs that have the SIT Training Package within their scope will necessarily deliver training in Tasmania.
- 30 [MySkills – Australia's directory of training](#)
- 31 Unpublished data supplied by Skills Tasmania
- 32 Unpublished data supplied by Skills Tasmania. Note: these figures refer to training commencements.
- 33 Unpublished data supplied by Skills Tasmania
- 34 Unpublished data supplied by Skills Tasmania
- 35 Unpublished data supplied by Skills Tasmania
- 36 National Centre for Vocational Education Research Ltd. [VET in Schools 2014 – Tasmania](#)