CAREERS AND JOBS OUTREACH STRATEGY

A CAREER AND JOBS OUTREACH STRATEGY FOR AUSTRALIA’S TOURISM AND HOSPITALITY INDUSTRY
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This report to the Australian Trade and Investment Commission (Austrade) is in two parts.

Part One is a communications and marketing Outreach Strategy (the Strategy) ready for consideration and execution by the Tourism and Hospitality industry, preferably, we recommend, in partnership with the Australian Government, and State and Territory governments and their agencies.

Part Two comprises ACIL Allen Consulting’s analysis of labour market and education and training barriers and opportunities to meet unmet demand in the Tourism and Hospitality labour market.

It also analyses the characteristics and attributes of careers and employment Outreach Campaigns in Australia and internationally, and considers the insights and views of Tourism and Hospitality stakeholders.

**Figure ES 1** overleaf provides a high level overview of the recommended Outreach Strategy:
CAMPAIN 1

Reach and positively influence young people and their influencers

Campaign development
- 24 month national marketing and communications campaign
- Segment 15-25 year olds, by education, training and employment aspiration
- Campaign targeting young people wanting a career, and young people wanting a job

Messages and audiences
- Develop campaign master brand (attributes = dynamic, exciting, rewarding careers and jobs)
- Messages: career paths, range of opportunities, available flexibility, mobility, skills for life
- Key audiences: 15 - 25 year olds, their parents and career counsellors

Content and channels
- Digital channels to find, reach and influence stakeholders: YouTube, Facebook
- Heavy content bias to 'real life' vignettes from young people including infographics and video
- Campaign website – content for young people: content rich, pathways to careers

ESTIMATED BUDGET X 2 YEARS = $5 MILLION

CAMPAIN 2

Reach and positively influence mature people and their prospective employers

Campaign development
- 24 month national marketing and communications campaign
- Segment mature-age labour supply by unemployed and underemployed to target messages and content
- Campaign targeting mature-age workers and their prospective employers

Messages and audiences
- Develop campaign master brand (attributes = dynamic, exciting, rewarding careers and jobs)
- Messages: jobs available, mature workers in demand, value of existing life experiences on the job, training
- Target geo-segmented mature people and employers in areas of high labour demand

Content and channels
- Radio, direct mail, Facebook, website, national news media/comms, execution
- Real life vignettes radio, Facebook, website, public relations, execution. Infographics, content rich website
- Campaign website – content for mature people: provide path to job and VET opportunities

ESTIMATED BUDGET X 2 YEARS = $7 MILLION

GOVERNANCE

Strategy and the campaigns managed by jointly by industry and government (Tourism and Labour and Skills Roundtable)

Governance
- Steering Group to be chaired by former senior public servant, and comprise industry (x3) and Austrade (x1) members
- Steering Group to appoint campaign managers (x2)

Resources & performance measurement
- Two campaign managers and two campaign coordinators for each Campaign
- Campaign managers to appoint (with Steering Group) agencies to execute the two campaigns
- KPIs to be established and campaign measurement through research

Content and channels
- Master advertising and marketing agency to be appointed and managed
- Master web development and curation agency
- Separate PR/comms agencies for each campaign

ONGOING PERFORMANCE MEASUREMENT AND REPORTING — TWO YEAR HORIZON

URCE: ACIL ALLEN CONSULTING 2016

A CAREER AND JOBS OUTREACH STRATEGY FOR AUSTRALIA’S TOURISM AND HOSPITALITY INDUSTRY
Part One – the Outreach Strategy

The Outreach Strategy comprises:

— two Campaigns; and
— a governance framework to guide the effective management and performance of each Campaign.

The Strategy is based on the analysis and findings as detailed in Part Two of the report.

The Strategy comprises content, tools and approaches that will engage two distinct audiences, employing different messages and channels that will most effectively reach and engage the different audiences. It also includes the creation of a dedicated master brand website to provide comprehensive and relevant information to support both target audiences’ information needs and to reinforce key messages convey through the Strategy’s two campaigns.

Campaign 1 is designed to reach and positively influence young people and their influencers (parents, career advisors) and will be delivered primarily via digital channels;

Campaign 2 is designed to reach and positively influence mature people and their prospective employers.

Each Campaign has been developed across a 24 month horizon to achieve the Campaign objectives and to ensure the Campaigns are delivered cost effectively.

Most of the activity recommended in each Campaign is most intensive in the first 18 months. We recommended that each Campaign be assessed after 12 months to establish progress, and to inform tactics and actions going forward.

Primary objective

The main objective of the Strategy is to reach and positively influence young people and mature people to consider careers and employment in the Tourism and Hospitality industry, to meet Australia’s growing and unmet labour market demand.

ACIL Allen’s analysis of the barriers and opportunities in the Tourism and Hospitality labour market reveals that education and training plays an important role in attracting and retaining employees in the sector (see Chapter 2).

The sector is experiencing, and will continue to experience, skills challenges at all levels – including vacancies in entry level positions, and projected future shortages at managerial levels.

For this reason, the Strategy seeks also to attract and recruit more Australians to seek out and pursue education and training in Tourism and Hospitality at all levels:
— vocational education and training (VET) programs (high school, TAFE and private colleagues);
— traineeship and apprenticeships;
— on-the-job industry training; and
— university.

Campaign 1 – young people and their influencers

The Campaign Strategy seeks to:

— position careers and shorter term employment in the industry as offering ‘skills for life’;
— present and highlight real and viable career paths across the industry;
— create a master or ‘umbrella’ brand for careers and jobs in the industry to which all marketing, advertising, communications, and stakeholder engagement can be linked; and
— develop and manage a dedicated website that links all content, tools, products and collateral which is regularly updated by industry and its partners.

Key messages

The Campaign will reinforce six messages:
1. The Tourism and Hospitality industry offers many well-paid and dynamic career and job choices that can meet the aspirations and needs of individuals, and that provide skills that can be used for life.
2. Careers and job opportunities are available across a wide spectrum of vocations and professions.
3. There are many flexible education and training paths into the industry.
4. The Tourism and Hospitality industry is one of Australia’s most important export industries. It is a dynamic and growing industry of national significance, and is generating thousands of new career and job opportunities across the nation.
5. Careers and jobs in the industry are passports to working and living across Australia and the world.
6. The ‘lived’ experience of people who have developed successful careers in the Tourism and Hospitality industry is proof of the rewarding careers, jobs, and opportunities that exist.

**Communication channels – digital focus**

Digital communication channels including social media platforms (Facebook, Instagram and Snapchat) will be the primary channels for the Campaign, as they reflect the preferred communication channels of the young people in particular, and are used also by a large number of the Australian working-age population.

The Campaign will also include segment-based communications targeting youth audiences (15 years to 25 years) via social media platforms and traditional news media channels, and a public communications and stakeholder engagement plan targeted at youth audiences (15 years to 25 years), and to a lesser degree parents.

**Master brand website – content for young people and their influencers**

We recommend a dedicated master branded website be created to centralise all information relevant to Campaign 1 audiences, such as information about career pathways, jobs, education and training options via industry segment, and by State and Territory (TAFE and private colleges).

The website will also provide easy access to information about financial assistance and subsidies for formal and on-the-job education and training, specific industry-backed and supported careers and employment initiatives.

It will be the responsibility of the Campaign Managers, in conjunction with industry groups and bodies, and education and training providers, to populate the website, and aggregate disparate education, training and career and job pathway information residing on industry and provider websites.

The objective for the master brand website is to be rich in content (a ‘one-stop-shop’) but also easily searchable so that opportunities in each of the hospitality and tourism sectors can be readily identified by website users.

**Creative style and tone of voice**

A dynamic, high energy and contemporary brand style will be require to effectively engage the 15 to 25 year cohort.

This brand style should apply across all communication environments and extend to the content of video communications and infographics.

We recommend video communication (akin to YouTube-style videos) be produced to bring the stories of real people to life (including young people and their parents) who are in education and training to prepare for jobs in the industry.

The approach should include developing case studies of people working across segments of the industry such as HR, food and beverage, senior management, customer service, IT, marketing and finance. The case studies should be translated into written vignettes accompanied with photographs of the people who are featured in them. The case studies should inform the content of the video vignette communication products.

The communication style of all collateral should be accessible and conversational; and should avoid the formality of traditional education and training and career pathway jargon.
Campaign measurement

We recommend key performance indicators are established to assess and report on the Strategy’s performance to industry and government stakeholders with specific performance targets determined by these stakeholders.

The recommended performance indicators and proposed methodologies are designed to assess the degree of awareness, understanding, favourability and future intentions of our two primary target audiences — young people and their parents, and mature people and their prospective employers — and will require specific resources to ensure this forms part of the overall Strategy.

Illustrative key performance indicators include:

— awareness and favourability towards the Tourism and Hospitality sector as a planned area of study, employment or career;
— awareness and understanding of the master brand and key Campaign messages (bespoke online research study);
— awareness and engagement with the master brand website (measured via digital analytics — page visits, length of visits, downloads, video viewership, requests for information etc.);
— participation levels and degree of positivity expressed through social media conversations (as measured via social listening);
— industry data in relation to course applications for apprenticeships, training course participation, tertiary study, professional development; and
— performance metrics identified by the Tourism and Hospitality sector representatives in partnership with government stakeholders.

We recommend benchmarking research be conducted prior to the Campaign commencing, and again prior to the conclusion of the first 12 months of Campaign activity to determine performance effectiveness.

The findings will inform the next wave of Campaign activity given the 24 month Campaign horizon and enable any required creative, content, messaging or channel refinement.

Campaign 2 - mature workers

The primary objective for this Campaign is to reach and positively influence mature people to seek employment in the industry, and encourage prospective employers to seek out and employ mature-age Australians.

Our analysis concludes that up to 21,000 Australians over 55 years look for part-time work (ABS, 2014); older workers are more favourably predisposed to work in Tourism and Hospitality (Colmar Brunton 2016); and that more than half of industry employers are looking to mature-age workers as an alternative source of labour to fill vacancies.

However, the research (Colmar Brunton 2016) indicates also that many mature-aged workers report they experience age discrimination when applying for jobs, and can become dispirited following multiple unsuccessful job applications.

We are therefore recommending a Campaign that will deliver two objectives:

— reach and influence mature-aged workers to consider employment in the Tourism and Hospitality industry to consider employment in the industry; and,
— reach and influence prospective employees to consider the maturity and life skills attributes of older workers, their capacity for flexible part-time or full-time work, and their disposition for on-the-job-training.

The Campaign Strategy seeks to:

— create a master or 'umbrella' brand for careers and jobs in the industry to which all marketing, advertising, communications, and stakeholder engagement can be linked;
— provide a dedicated website that links all content, tools, products and collateral and is regularly updated by industry and its partners;
— communicate that employment in the industry offers mature-aged workers the opportunity to be part of
one of Australia’s most important and fastest growing industries;
— reach and influence mature-aged Australians in geographic areas of high, unmet demand for labour in
the industry to consider full-time or part-time employment in tourism or hospitality.
— reach and engage employers in geographic areas where unmet labour demand is highest to consider
the benefits of managing a mixed-age employee cohort;
— position careers and/or jobs in the industry with mature-age workers as offering the opportunity to
apply the insights and skills they have developed from decades of previous education, training and
employment;
— present and highlight the flexibility available in many segments of the industry;
— provide a dedicated website that links all content, tools, products and collateral which is regularly
updated by industry and its partners.

Key messages
The Campaign will reinforce a number of key messages:
1. There is high demand for mature age workers in specific industry segments.
2. Mature workers have life experience that can be applied to available jobs.
3. Mature workers can be more disposed to on-the-job training, and may prefer this type of training more
than other prospective employees. The availability of jobs that incorporate on-the-job training, but do
not require formal education or training, should be emphasised with mature-age workers.
4. The availability of mature-age workers who are disposed to on-the-job training, but do not require
formal education or training, should be emphasised with prospective employers.
5. Many employment opportunities offer flexible hours, and many mature-age workers are able to work
flexible hours.

Recommended communication channels
A combination of radio advertising (stations and programs that specifically target mature-age workers
and prospective employers), Facebook posts and content, direct marketing (targeting prospective
employers) and media relations are recommended as core communication channels to effectively
engage with our target audiences.

It is recommended also that a small number of testimonial videos be produced focusing on ‘the lived
experience’ of mature-age workers and their employers; and that these be disseminated via a targeted
Facebook execution (geo-targeted to mature-age Australians in areas of high unmet labour demand),
and to be housed also on the Campaign 2 website.

Master brand website – content for mature people
As with Campaign 1, the dedicated master brand website will also centralise all relevant information
about employment and career pathways for mature-age workers (with an emphasis on employment)
for Campaign 2.

The website will be an easy to access and central source for information about geographic areas in
which unmet labour demand is high, and the nature of employment positions available.

As with Campaign 1, it will be the responsibility of the Campaign 2 Manager to identify content with
which to populate the website, including employment, training and career pathway information from
disparate industry and education and training entities. Collating and presenting this information clearly
on the Campaign website, and in an accessible manner, is a critical Campaign Manager
accountability.

Campaign measurement
The recommended performance indicators and proposed methodologies are designed to assess the
degree of awareness, understanding, favourability and future intentions of our two primary target
audiences – mature-age workers and prospective employers - and will require specific resources to ensure this forms part of the overall Strategy, specifically:

- awareness and favourability towards the Tourism and Hospitality sector as a prospective employer;
- awareness and understanding of the master brand and key Campaign messages (bespoke online research study);
- awareness and engagement with the master brand website (measured via digital analytics – page visits, length of visits, downloads, video viewership, requests for information etc.);
- participation levels and degree of positivity expressed through Facebook (as measured via digital analytics);
- industry data in relation to older audience employment levels within the sector; and
- other performance metrics identified by Tourism and Hospitality sector representatives in partnership with their government stakeholders.

It is recommended that benchmarking research be undertaken prior to the Campaign commencing, and again following the initial 12 months of Campaign, to determine performance effectiveness.

The research findings will inform the next wave of Campaign activity given the 24 month Campaign horizon, and enable refinement of creative, content, and messaging.

**Part 2 – Analysis underpinning and informing the Outreach Strategy**

Part 2 of this report comprises:

- labour market analysis of barriers and opportunities to meet projected labour market demand;
- analysis of case studies of career and employment outreach strategies and programs in Australia and internationally; and
- analysis of the outputs of stakeholder interviews, which captured insights and observations of the Tourism and Hospitality labour market, the nature of growing unmet labour demand, and perceptions about the elements of an effective outreach Strategy.

**Labour market analysis**

ACIL Allen’s analysis concluded that the cafés, restaurants and takeaway food services, retail trade, and accommodation segments of the Tourism and Hospitality industry contribute most to employment, and to the economy.

The industry segments in which most career and employment opportunities will be available are in cafés, restaurants and takeaway food services, ownership for dwellings, and education and training.

The largest projected skill shortages will be for positions that have career and progression pathways. The highest levels of skills shortages will be for managers in café and restaurants, and hotels and motels.

**Negative impact of declining financial support for VET, higher education and on-the-job training fees**

Declining financial support for the VET sector in Australia, and for VET student support, will create strong headwinds for policy makers and Tourism and Hospitality leaders wanting to bridge skill and labour shortages in the industry.

Ninety per cent of Tourism and Hospitality-related VET opportunities attract government-subsidies. This is a significant driver of students enrolling in Tourism and Hospitality-related VET programs.

However, our analysis concludes also that completing a VET course does not resolve problems with the perceived lack of career pathways in Tourism and Hospitality. This is because formal training does not lead directly to a job and career in the industry.

Despite government support for funding VET courses in industries and sectors experiencing skill shortages, the level of subsidies for students have been decreasing.
The TAFE sector nationally is also facing significant funding and management restructuring, and is being encouraged by governments to source more of its funding base from industry and students.

We note also that many employers in the industry do not place high value on accredited training, and have a strong bias for on-the-job training.

This suggests there will be growing tension and disconnection between the objectives of parts of government wanting to shift education and training costs from the public balance sheet, at the same time that other parts of government and the industry want more Australians to participate in education and training to meet skills and labour shortages.

The Strategy recommended in this report will go some way to encouraging more Australians and their influencers to consider employment and careers in Tourism and Hospitality.

However, the larger policy issue of funding for Tourism and Hospitality education and training (especially VET) will, we counsel, create barriers to entry for students, and undermine the availability of formal education and training pathways, if the funding issues are not addressed.

**Stakeholder insights and observations**

Stakeholders interviewed for this report were strongly of the view that any Outreach Strategy to promote jobs and careers in Tourism and Hospitality needs to focus primarily on young people in the latter years of high school, and up to university age.

Stakeholders maintain that digital channels should be used to drive engagement, and key messages need to address and re-frame negative predispositions in relation to jobs and careers in the industry.

There was general agreement among stakeholders that:

— ongoing outreach to young people in particular should be segmented to delineate between opportunities for ‘jobs’ (full-time and long-term, as well as casual and transitory), and ‘careers’ across different vocations, but which require more structure and longer-term commitment;

— communication should emphasise careers in the industry are multi-vocational and not all are customer facing;

— outreach needs to emphasise that skills and capabilities developed in the industry are ‘skills for life’;

— mobility represents a “passport” for young people to be able to work across Australia, and the world; and,

— while there is a growing pool of more mature people in Australia, younger people will be the largest source of labour to meet existing and projected unmet employment demand in Tourism and Hospitality.

**Attributes of effective careers outreach strategies and Campaigns**

Local and international careers Outreach Campaigns employ the ‘lived experience’ of young people working and pursuing Tourism and Hospitality careers and execute their Campaigns under a ‘master brand’.

While the most effective Campaigns target young people (including those commonly developed and executed - with large budgets - by branches of defence forces in markets such Australia, Singapore, and the US), their content and tone are designed to appeal to ‘influencers’, including parents.

The primary communication channels favoured for career outreach comprise digital and print-based communication, websites, video (YouTube, vimeo¹), other social media channels (Facebook, Instagram), public relations (launches, competitions and editorial), as well as events, tours, conferences, and careers shows and expositions.

¹ 'Vimeo' is a popular video-sharing website in which users can upload, share and view videos. See www.vimeo.com.
This part of the report outlines the six pillars of the Outreach Strategy and its execution. As part of the Strategy, two separate Campaigns are required:

- Campaign 1 – focused on influencing young people and their influencers.
- Campaign 2 – focused on influencing mature people and their potential employers.
This chapter outlines the recommended Outreach Strategy.

1.1 **Objective**

The objective of the Strategy is to attract and recruit more Australians into employment, education and training in the Tourism and Hospitality industry within two years.

1.2 **General approach**

The Strategy has been developed to specifically capture the attention of and influence:

- young people and their influencers (parents, career advisors). We note that parents in Australia exert considerable influence over the education, training and career choices of their offspring;
- mature people and their prospective employers;
- education and training providers.

The Strategy directs that its objectives be delivered by two marketing and communications Outreach Campaigns – one targeted at young people and their influencers; and one targeted at mature-age workers.

1.3 **Six strategic pillars**

Figure 1.1 illustrates the six pillars of the Outreach Strategy, to be executed via a marketing and communications Campaign, to be developed and managed over 24 months. It is recommended the Campaign is reviewed after 12 months to determine its impact and effectiveness.

1. **Develop and steward a master Tourism and Hospitality education and training, and careers and jobs brand** for all peak industry, government, VET and university provider activity and efforts.

   We recommend a master brand be developed for education and training, careers and job opportunities in Tourism and Hospitality.

   The master brand will centralise all industry and public sector efforts and activity. The single brand represents an opportunity to establish a premier positioning for Tourism and Hospitality education and training, job and career information, dialogue and engagement.

   Campaign 1 and Campaign 2 will be developed under the master brand and its marque.

2. **Develop an Outreach Campaign under the master brand, to be managed over two years initially.** The Campaign should seek to strengthen the reputation, desirability and positioning of careers and jobs in Tourism and Hospitality, including positioning the industry as one of national
significance to Australia. This includes positioning industry qualifications, jobs and careers as those that offer skills that can be used for life, and offering job and career mobility internationally.

3. **Campaign content should focus on the ‘lived’ experience of employees in the industry, including on developing skills for life, qualifications and experience that can be used across Australia and overseas, and skills and experience that are valuable for people wanting to start their own businesses.** Campaign content should focus also on how working in the industry contributes to one of the most dynamic and important industries in the nation.

4. **Utilise communication channels most appropriate to the target audiences to deliver the Campaign:**

   a) **Campaign 1** – young people primarily but their ‘influencers’ also – parents and school counsellors – to inform, engender interest, generate dialogue, and create a competitive industry recruiting position for Tourism and Hospitality. Digital channels to be used primarily to reach audiences, deliver messages, and influence stakeholders;

   b) **Campaign 2** – mature-age workers and their prospective employers – using radio, some digital, earned news media and direct mail to reach and influence mature-age workers and their prospective employers.

5. **Engage the most prominent and influential industry, education and training, government and public policy stakeholders to contribute information** to endorse the Campaign, and engage their own stakeholders in relation to the Campaign and its key messages.

6. **Develop a performance measurement framework to assess progress and outcomes** of the Outreach Strategy and inform future Strategy and tactics.
**FIGURE 1.1 RECOMMENDED SIX STRATEGY PILLARS AND TACTICS**

<table>
<thead>
<tr>
<th>1</th>
<th>Develop a master outreach brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Review the existing Discover Tourism master outreach brand in Australia, and other master brands internationally to develop a compelling and contemporary master outreach brand that will appeal largely to young people from Year 10 through to a last year of university student.</td>
<td></td>
</tr>
<tr>
<td>- Develop a masterbrand market and value positioning that will appeal to and resonate with young people especially, and that will position education and training and careers in tourism and hospitality and tourism as dynamic and exciting.</td>
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<tr>
<td>- The master outreach brand must be developed to house the attractiveness of jobs and careers in the industry.</td>
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<tr>
<td>- Execute all outreach strategy and the tactics to deliver it in a manner that features and connects the outreach brand marque.</td>
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<table>
<thead>
<tr>
<th>2</th>
<th>Develop a common knowledge repository to inform outreach content</th>
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</thead>
<tbody>
<tr>
<td>- Use existing Discover Tourism content base as a foundation to build a more comprehensive and repository of information and research to inform all outreach campaign content.</td>
<td></td>
</tr>
<tr>
<td>- A single website will be the front end of the common repository.</td>
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</tr>
<tr>
<td>- The website will comprise a database at its backend, which will be maintained and curated by a tourism or hospitality industry body (on a contract basis).</td>
<td></td>
</tr>
<tr>
<td>- A public facing, open access area of the website will comprise content to inform and engage students, parents and other job and career influencers, as well as potential employees in the tourism and hospitality industry.</td>
<td></td>
</tr>
<tr>
<td>- The website will comprise a sign-up subscription area to provide information specific to education and training providers, industry bodies and government agencies.</td>
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<thead>
<tr>
<th>3</th>
<th>Stakeholder engagement to drive and support outreach messages</th>
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</thead>
<tbody>
<tr>
<td>- Via a process of stakeholder mapping, identity, categorise and tier (Tier One, Tier Two, Tier Three) the stakeholders that will be most important to successful delivery of the outreach campaign.</td>
<td></td>
</tr>
<tr>
<td>- Engage Tier One and Tier Two industry, government and education and training stakeholders to in to seek their involvement in the outreach campaign, and to develop new content for the campaign (digital content especially).</td>
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</tr>
<tr>
<td>- Senior high school students and their parents, careers advisors, and VET and university students to be priority Tier One stakeholders.</td>
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</tr>
<tr>
<td>- Engage Tier One, Tier Two and Tier Three stakeholders to encourage them to distribute campaign content (digital content especially) via their communication channels.</td>
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<thead>
<tr>
<th>4</th>
<th>Use informed communication segmentation to reach priority audiences</th>
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</thead>
<tbody>
<tr>
<td>- Segment communication and engagement channels and fora to best reach and engage priority audiences and stakeholders - students in high school, and potential VET and university students, parents.</td>
<td></td>
</tr>
<tr>
<td>- These communication segments should be social media, editorial, internship arenas, career expos and job fairs, advertising, YouTube (for case studies), employer familiarisation programs.</td>
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</tr>
<tr>
<td>- Heavy emphasis on generating digital content to be used in each communication segment.</td>
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<tr>
<td>- Content to be tailored to best target the stakeholder audience and its preferred communication channels.</td>
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<table>
<thead>
<tr>
<th>5</th>
<th>Five main message areas. Heavy focus on delivery via digital channels</th>
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</thead>
<tbody>
<tr>
<td>- Proactively seek out Campaign messages and content to be developed and packaged to be hosted on and shared across digital channels, including social media.</td>
<td></td>
</tr>
<tr>
<td>- Five areas of message and content focus are:</td>
<td></td>
</tr>
<tr>
<td>- 1. Personal stories and case studies – the lived experience</td>
<td></td>
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<tr>
<td>- 2. Career choices and job choices that can meet the aspirations and needs of individuals and that provide skills for life</td>
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<tr>
<td>- 3. Flexibility of education and training pathways across the industry – high school, VET (TAFE, private, industry, on-the-job), university</td>
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<tr>
<td>- 4. Dynamic, growing industry of national significance and economic contribution</td>
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<tr>
<td>- 5. Careers and jobs that are a passport to advancing, working, living across Australia and the world</td>
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<tr>
<td>- The tone of all outreach content to communicate dynamism and contemporary relevance of tourism and hospitality careers and jobs.</td>
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<tr>
<th>6</th>
<th>Tripartite approach. Dynamic and contemporary approach</th>
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<tbody>
<tr>
<td>- The outreach campaign be funded, developed, and managed by industry, governments and education and training providers via a roundtable approach.</td>
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<tr>
<td>- Stakeholders not yet engaged to develop the strategy be engaged around its direction and detail to inform and secure their input, insights, and support.</td>
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<tr>
<td>- KPIs (key performance indicators) be established to understand progress and to inform tactics. Campaign progress – reach, awareness, impact – be reported to Tripartite campaign roundtable every six months.</td>
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</table>

**SOURCE:** ACIL ALLEN CONSULTING, 2016
1.4 Campaign 1 – young people and their influencers

**Key messages**

We recommended that the Campaign content reflects and focuses on a number of primary messages that highlight the advantages of flexibility, lifestyle balance, the diversity of vocational paths within Tourism and Hospitality, and to counter perceptions that industry employment and career opportunities are limited and low paid.

We note that no short-term Campaign will be able to address and counter all negative perceptions of an industry or sector. However, we recommend an Outreach Strategy be managed across an initial 24 months to seek to encourage more young people and their parents to consider the viability and positive life opportunities of pursuing a career or employment in the Tourism and Hospitality industry.

The recommended Campaign 1 messages are:

1. The Tourism and Hospitality industry offers well-paid and dynamic career and job choices that can meet the aspirations and needs of individuals, and that provide skills that can be used for life. Careers and job opportunities are available across a wide spectrum of vocations and professions, from HR, IT, finance, general management, food and beverage, customer service, and events planning and management;
2. There are many flexible education and training paths into the industry – university, high school, and the vocational education and training system, including TAFE, private colleges, industry and group apprenticeships and training, and on-the-job training; and mix of formal and on-the-job training;
3. The Tourism and Hospitality industry is one Australia’s most important export industries. It is a dynamic and growing industry of national significance, and is generating thousands of career and job opportunities across the nation;
4. Careers and jobs in the industry are passports to working and living across Australia, and the world; and
5. The ‘lived’ experience of people who have developed successful careers in the Tourism and Hospitality industry is proof of the rewarding careers, jobs, and opportunities that exist.

**Campaign message proof points**

To develop content for Campaign 1 (for the central website, videos, infographics, visuals, news media editorial, personal case studies and vignettes), the key Campaign messages will require evidence-based ‘proof points’ – demonstration through the ‘lived’ experience of real people, and robust data and information from industry and government.

This requires:

— identifying and researching the stories of real people working in the industry or preparing to work in it;
— evidence of real career paths for young people;
— accurate information about education and training, student financial support, apprenticeships, traineeships, and on-the-job-training; and
— testimonials from employees in the industry who enjoy and benefit from flexible hours, reliable income, mobility, and job satisfaction.

**Proof points**

**Message:** The Tourism and Hospitality industry offers well-paid and dynamic career and job choices that can meet the aspirations and needs of individuals, and that provide skills that can be used for life. Careers and job opportunities are available across a wide spectrum of vocations and professions, from HR, IT, finance, general management, food and beverage, customer service, and events planning and management.

— Visual executions (infographics, video) of career path for entry-level: accountant in a large hotel group; a marketing executive working for a tour operator; a food and beverage floor employee in a restaurant chain; a customer service representative working in an online travel company; a waitress or waiter working in a café and wanting to start their own restaurant; an administrative officer in a resort working...
A CAREER AND JOBS OUTREACH STRATEGY FOR AUSTRALIA’S TOURISM AND HOSPITALITY INDUSTRY

Message: There are many flexible education and training paths into the industry – university, high school, and the vocational education and training system, including TAFE, private colleges, industry and group apprenticeships and training, and on-the-job training, and mix of formal and on-the-job training.

— Infographics (based on industry group content) on the education, training and on-the-job pathways to mid-level and senior employment positions in their sectors. Short video testimonial vignettes to be produced to tell the story of real people who are in their career positions by following different education and training pathways. Supplement with information from TAFE systems, universities, and private education and training providers.

Message: The Tourism and Hospitality industry is one of Australia’s most important export industries. It is a dynamic and growing industry of national significance, and is generating thousands of career and job opportunities across the nation.

— Short video testimonial vignettes to be produced to tell the story of real people who are at the zenith of their careers in Tourism and Hospitality (hotel managers, executive chefs, CFOs, restaurant and café owners, tour operators, marketing managers). It is preferred that some (but not all) of these individuals may already have a high media or community profile. Infographics on growth of careers and jobs in the industry, including areas of most rapid growth. Infographics on contribution of the industry to GDP.

Message: Careers and jobs in the industry are passports to working and living across Australia and the world.

— Short video testimonial vignettes to be produced to tell the story of real people who are working in Tourism and Hospitality positions and careers overseas because of their training/job experience in Australia; and the stories also of employees who have used their employment experience to work across Australia. Infographics of Australian Tourism and Hospitality labour demand in key markets in Europe, Asia, North and South America, and the Middle East.

Message: The lived experience of people who have developed successful careers in the Tourism and Hospitality industry is proof of the rewarding careers, jobs, and opportunities that exist.

— Short video testimonial vignettes to be produced to tell the story of real people who have been working successfully in Tourism and Hospitality for many years (some content common to previous messages). Content to focus especially on the stories of people who have started their own businesses. Infographics on statistics on owners/managers of their own enterprises in Tourism and Hospitality.

Campaign channels

1. Initial Campaign to be delivered primarily via digital channels (including social media e.g. Facebook, Instagram and Snapchat) under the Outreach careers and jobs master brand (only 30 per cent of people remember what they read, but 80 per cent recall what they see - Public Affairs Council, USA 2016).

All packaged products (video, infographics, images, text) should be developed so that they can be shared across digital channels via paid and earned presence.

The Campaign should be supported by advertisements on social media to drive traffic to content on the master branded website, and to linked social media properties on Facebook, Snapchat, and Instagram).

The Campaign will include development and execution of a public communications and stakeholder engagement plan to generate free media presence, targeted at youth audiences (15 years to 25 years), and to a lesser degree, their parents.

2. The mainstay of the Campaign will be dynamic/high energy, contemporary, packaged video (can be of low cost but authentic production values) and infographics telling the stories of real people who are in education and training to prepare for jobs in the industry, or people working across segments of the industry such as HR, food and beverage, senior management, customer service, IT, marketing, and finance.
Execution should include people working in the industry across Australia, as well as those using their Tourism and Hospitality industry qualifications and experience to work overseas. All video and infographics content should be linked back to the master branded outreach website.

To target young people and their parents, include a small number of testimonials featuring parents talking about the successful careers of their offspring in Tourism and Hospitality careers.

3. A master branded website be developed and maintained as the ‘one-stop-shop’ for information about career pathways, jobs, education and training options via industry segment and via State and Territory (TAFE and private colleges), financial assistance and subsidies for formal and on-the-job education and training, specific industry-backed and supported careers and employment initiatives.

Development and management of the website (and the database on which it is built) to be contracted to a suitable industry body or association.

The website will also provide easy access to information about financial assistance and subsidies for formal and on-the-job education and training, specific industry-backed and supported careers and employment initiatives.

It will be the responsibility of the Campaign Managers to coordinate with industry groups and bodies, as well as education and training providers, to populate the website, in large part by aggregating disparate education, training and career and job pathway information residing on industry and provider websites.

The objective is for the master-brand website to be rich in content but also easily searchable, and constructed so that opportunities in each of the Tourism and Hospitality sectors can be readily identified by website users.

In each State and Territory, seek TAFE, university, and private provider co-operation to provide content on Tourism and Hospitality-specific education and training courses, and relevant information on fees, charges and student financial support, to be featured on the master website.

The specific content that needs to be developed and continually updated on the master website is reflected in Figure 1.2 below.

**FIGURE 1.2 CORE CONTENT FOR MASTER WEBSITE**

<table>
<thead>
<tr>
<th>HOME</th>
<th>CAREER PATHWAYS &amp; RESOURCES</th>
<th>CAREER CASE STUDIES</th>
<th>SKILLS &amp; EDUCATION</th>
<th>TOURISM &amp; HOSPITALITY BUSINESSES</th>
<th>INDUSTRY LINKS</th>
<th>NEWS &amp; EVENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>About the Australian Tourism &amp; Hospitality industry</td>
<td>Use existing the Discover A-Z of roles Industry sectors Information sheets Pathway charts Plan your career or qualification My Career Match Resources and tools including support networks Recruitment linkages</td>
<td>Real life stories across different roles, ages, sectors and locations – video format Information on different career practitioners “A day in the life of…” for different roles and professional environments – video format Career success stories – video interviews and testimonials Opportunities for women in Tourism and Hospitality</td>
<td>Segment communication and National education and training institutions and open days Course listing Sources of financial assistance Training packages E-Learning Qualifications explained Internships Group training Re-training Literacy</td>
<td>Industry groups and bodies Awards and achievements Professional associations</td>
<td>Industry news Social media via LinkedIn, Facebook, Twitter, YouTube etc. National and State event calendar – conferences, career shows, tours, expositions Media centre</td>
<td>Industry news Social media via LinkedIn, Facebook, Twitter, YouTube etc. National and State event calendar – conferences, career shows, tours, expositions Media centre</td>
</tr>
</tbody>
</table>

SOURCE: ACIL ALLEN 2016
Measurement to understand progress and inform Strategy

The recommended performance indicators are designed to assess the degree of awareness, understanding, favourability and future intentions of the two primary target audiences.

Performance indicators for Campaign 1—targeting young people and prospective employers—should be:

- awareness and favourability towards the Tourism and Hospitality sector as a planned area of study, employment or career;
- awareness and understanding of the master brand and key Campaign messages (bespoke online Campaign research study);
- awareness and engagement with the master brand website (measured via digital analytics – page visits, length of visits, downloads, video viewership, requests for information etc.);
- participation levels and degree of positivity expressed through social media conversations (as measured via social listening);
- industry data in relation to course applications for apprenticeships, training course participation, tertiary study, professional development; and
- other performance metrics identified by the Tourism and Hospitality sector.

Performance indicators for Campaign 2—targeting mature-age workers and prospective employers—should be:

- awareness and favourability towards the Tourism and Hospitality sector as a prospective employer;
- awareness and understanding of the master brand and key Campaign messages (bespoke online research study);
- awareness and engagement with the master brand website (measured via digital analytics – page visits, length of visits, downloads, video viewership, requests for information etc.);
- participation levels and degree of positivity expressed through Facebook (as measured via digital analytics);
- industry data in relation to older audience employment levels within the sector; and
- other performance metrics identified by the Tourism and Hospitality sector.

Measurement will require dedicated resources to ensure this forms part of the overall Strategy.

We recommend the Strategy include key performance indicators that can be measured, and reported to industry and government stakeholders involved with and supporting the Outreach Campaign.

ACIL Allen recommends also that as well as measuring Strategy outcomes to understand progress, measurement data be used also to inform adjustment to the Strategy and the tactics managed to execute it.

1.5 Campaign 2—mature people and their prospective employers

Key messages

Analysis of the Colmar Brunton attitudes research (2016), the Deloitte labour market research (2016), and ACIL Allen’s own analysis of available labour market data, stakeholder insights, and attributes and characteristics of career and labour market Outreach Campaigns, concluded the focus of Campaign 2 messages should be in the areas below:

1. There is high demand for mature-age workers in specific industry segments. Demand in all segments needs to be highlighted in Campaign messages and content, including the geographic areas in which demand is highest.

2. Mature workers have life experience that can be applied to available jobs. This message, and content to deliver it, need to be targeted at mature-age workers as well as prospective employers. This message includes an element that the education and training, work, and life experience of mature-age workers can be valuable to employers wanting reliable employees who understand how workplaces operate.
3. Mature workers can be more disposed to on-the-job training, and may prefer this type of training more than other prospective employees. The availability of jobs that incorporate on-the-job training, but do not require formal education or training, should be emphasised with mature-age workers. The availability of mature-age workers who are disposed to on-the-job training, but do not require formal education or training, should be emphasised with prospective employers.

4. Many employment opportunities offer flexible hours, and many mature-age workers are able to work flexible hours. The availability of mature-age workers disposed to working flexible hours (including during seasonal cycles) should be emphasised with employers. The availability of jobs that offer flexible hours, and/or seasonal flexibility, should be emphasised with mature-age workers.

**Proof points**

**Message:** There is high demand for mature-age workers in specific industry segments. Demand in all segments needs to be highlighted in Campaign messages and content, including the geographic areas in which demand is highest.

— Visual executions (infographics) of geographic areas and industry segments where there is high labour market demand. Production of videos featuring employers encouraging mature-age workers to seek employment in the industry. Generation of testimonial vignettes of mature-age people working in the industry to be produced as part of the communications and public relations Campaign to tell the story of real people who are working in rewarding jobs. Distribution during the Facebook Campaign also.

**Message:** Mature workers have life experience that can be applied to available jobs.

— Radio commercials featuring (briefly) the positive views of mature-age workers employed in rewarding jobs in the industry. Production of video featuring mature-age workers offering their positive views of working in the industry and generation of testimonial vignettes produced as part of the communications and public relations Campaign to tell the story of real people who are working in rewarding jobs, with an emphasis on workplace flexibility.

**Message:** Mature workers can be more disposed to on-the-job training, and may prefer this type of training more than other prospective employees.

— Generation of testimonial vignettes of mature-age people working in the industry who have been able to transition into rewarding jobs that require only on-the-job training. Testimonials also from employers. These will be produced as part of the communications and public relations and radio advertising Campaigns, and text and images on the Campaign website, to tell the story of real people. The availability of mature-age workers who are disposed to on-the-job training, but do not require formal education or training, should be emphasised to prospective employers in the direct mail marketing Campaign.

**Message:** Many employment opportunities offer flexible hours, and many mature-age workers are able to work flexible hours.

— The availability of mature-age workers disposed to working flexible hours (including during seasonal cycles) should be emphasised to employers via testimonials in the direct mail marketing execution, the video vignettes, and as part of the public relations Campaign content. The availability of flexible hour’s opportunities needs to be a key theme of the radio, Facebook, and public relations Campaigns, and a key theme also promoted on the Campaign 2 website.

**Campaign 2 channels**

i. **We recommend an initial 18 month mature-age worker Outreach Campaign** to be delivered primarily via above-the-line radio advertising, Facebook, a direct mail targeting prospective employers, and a media relations Campaign seeking to influence mature workers and employers.

ii. **A master branded website, to be developed and maintained as the ‘one-stop-shop’ for information about employment and career pathways for mature-age workers.**

The website needs also to be an easy to access and central source of information about geographic areas in which unmet labour demand is high, and the nature of employment positions available.
iii. It is recommended that a small number of testimonial videos be produced focusing on the ‘lived’ experience of mature-age workers and their employers, and that these be disseminated via a targeted Facebook Campaign (geo-targeted to mature-age Australians in areas of high unmet labour demand), and to be housed also on the Campaign 2 website.

iv. A radio advertising Campaign of two to three commercials be developed featuring mature-age Australians working in the industry, and also employers of mature-aged people in the industry. The radio Campaign should be geo-targeted to areas of high unmet labour demand in the industry, including leading up to periods of high seasonal demand. The radio commercials should emphasise the opportunities and flexibility of jobs for mature-age workers, including jobs that do not require job-related education and training.

v. A news media and communications public relations Campaign to generate earned (free) news media coverage of the Campaign and its messages. This execution should be developed to generate 10 to 12 testimonial executions in each State, and four in each Territory, of mature-age Australians working in the industry, and of the experience of employers managing mature-age employees. The channels targeted by the public relations execution should include all news media channels (television, print, radio, digital) as well as industry journals and publications. Content should be generated also, and targeted at, trade and industry association channels.

vi. A direct mail execution focused on industry employers in areas of high unmet labour demand, comprising messages and content to encourage employers to consider mature-age Australians to comprise a component of their workforce. It is recommended the direct mail execution be geo-targeted to employers in regional areas, and other areas of high unmet labour demand. The direct mail content should be focused on the benefits of employing mature-age workers, including the past life and job experience of most mature-age workers, and any public employment or training financial support available to businesses that employ mature-age workers. It is recommended the direct mail product include a “call to action” to visit the Campaign website (on which there will be contact details to source mature-age workers).

Measurement and reporting
It is recommend Campaign 2 be measured against key performance indicators, and progress be reported to industry and government stakeholders involved with it.

It is recommended performance indicators be calibrated to understand awareness of the Campaign among audiences who have engaged with its products and collateral, and the disposition of individuals in those audiences to consider mature-age employment in the industry.

1.6 Executing the Strategy

We recommend a governance framework is developed in order to manage practical considerations which require deliberation to develop, manage and sustain a Strategy of the nature proposed.

Governance

Austrade has established a Tourism and Hospitality Labour and Skills Roundtable as a mechanism to connect industry with government and to develop strategies for ensuring a sustainable tourism workforce into the future. The Roundtable has also established a work plan to look at six key themes to ensure Australia is well suited to meet tourism growth projections to 2020.

Industry collaboration to develop career pathways

A critical element of the Outreach Strategy is the development of career pathways for different roles within the Tourism and Hospitality sector pathways that are designed and validated by the sector. We recommend that industry collaborate with government and education and training providers to capture and promote a range of flexible career options and opportunities for advancement that exist within their sector. This is an important undertaking for the Tourism and Hospitality Steering Group to lead, implement and to ensure commitment and uniformity across all parts of the sector.
Our analysis revealed there is presently no single agreed career pathway for different sector roles and functions within the sector – refer to Figure 4.16 ‘Tourism and Hospitality VET Pathways’ in this report. The Outreach Strategy provides an opportunity for the industry to position ‘flexibility’ as an inherent strength of working in Tourism and Hospitality as the sector provides individuals choice and opportunities to pursue their interests and passions while advancing their career paths.

Models for developing and presenting career pathways to address skills shortages have been developed in Australia and overseas. Selected examples developed by other industries are provided in below.

**FIGURE 1.3 EXAMPLE OF CAREER PATHWAY WEBSITE – RAIL**

```
SOURCE: HTTP://WWW.RAILCAREERPATHWAYS.NET.AU/
```
Literature and good practice examples suggest there are three key components to developing and promoting career pathways, by industry. These are:

1. identifying careers that align with the skills needs of the industry and the economy to be promoted;
2. prompting target audiences to think strategically about their career needs and preferences;
3. helping individuals map their career paths by providing information on career paths, job descriptions, available education and training options, available industry career support programs, and useful links to assist with career planning.

Figure 1.5 details the three steps for developing and promoting career pathways by industry.
When developing information to be provided for the third component – help individuals map their career path – there are also a number of principles that should be observed for the Tourism and Hospitality sector. Notably:

— different pathways are required for various age brackets, levels of education and role type;
— career pathways are most effective when they are supported by actual case studies;
— the different stages in the pathway should be simple and intuitive;
— the pathway should accurately reflect the challenges and opportunities of the function/role and provide practical advice and references to ensure that individual expectations are well managed.

Figure 1.6 overleaf provides a template example for developing a career pathway for young people looking to enter the industry.
In addition to featuring ‘lived’ experiences of real people who are working and achieving their career goals in the industry, career maps are a useful convention to help individuals visualise different information. For example, the range of entry points, relevant jobs and roles, career progression and development options, education and training options, and industry supported programs available.

Examples of how to visually present career paths are provided below.
FIGURE 1.7  EXAMPLES OF CAREER PATH MAPS

FIGURE 1.8 EXAMPLES OF CAREER PATH MAPS

AN EXAMPLE OF A HOSPITALITY CAREER PATHWAY

Cameron’s first job in the Hospitality industry is as a Bar Person at a local pub. The casual job is just meant to fund his next holiday, but he gets a ‘taste’ for the Hospitality industry and decides he’d like to work in it long term (as well as continue to patronise it). Cameron fancies he one day would like to manage a Las Vegas hotel, so his South Australian career pathway might look something like this:

**GAMING**
- Gaming Attendant
- Door Steward
- Cocktail Room Attendant
- Change Steward
- Tab / Keno Attendant
- Gaming Supervisor
- Gaming Manager
- Games / Promotions Director
- Club Manager
- Club Secretary

**FOOD AND BEVERAGE**
- Bar Person
- Cellar Hand
- Food and Beverage Attendant
- Bar Attendant
- Bottle Shop Attendant
- Snack Bar Attendant
- Restaurant Cashier
- Host or Hostess
- Cocktail, Bar Attendant
- Sommelier
- Restaurant Supervisor
- Catering Supervisor
- Restaurant Manager
- Restaurant Director

**FRONT OFFICE**
- Clerk/Assistant
- Bell Desk Attendant
- Porter
- Valet
- Telephone
- Receptionist
- Reservations Officer
- Cashier
- Front Office Supervisor
- Night Auditor
- Front Office Manager
- Concierge
- Duty Manager
- General Manager

A Certificate I in Hospitality would be a good start for Cameron – as would a job as a Porter in a larger Hotel. The Certificate II in Hospitality allows for some specialisation in Food and Beverages, so that would help Cameron back into this sector and - with some in-house specialist training and licensing - Cameron could then move again to become a Gaming Attendant. Working through Certificates III and IV in Hospitality Cameron could be promoted to ‘Supervisor’ and could then use this experience and his qualifications to move back into accommodation as a Front Office Supervisor. Because Cameron will have been specialising in Gaming in his earlier training, he could then pick up some of the Accommodation Services units and work toward his Diploma of Hospitality and Advanced Diploma of Hospitality to help him move through the hierarchy of management positions.

Cameron will still be a long way from Las Vegas, but he’s on his way!

Campaign management

It is recommended that the two Campaigns be managed at the executive level with the assistance of an administrative coordinator. Each Campaign manager should be able to manage a Campaign of the nature proposed in Campaign 1, and Campaign 2, with the support and assistance of specialist marketing, advertising, communications and digital agencies and consultants.

Two Campaign managers will be required to manage:
- Campaign 1 – focus on younger Australians; and
- Campaign 2 – focus on mature-age workers and prospective employers.

Each Campaign manager would be responsible also for working with stakeholders (governments, VET providers, universities, industry bodies) to obtain data and information to calibrate Campaign content.

In consultation with the steering group, each Campaign manager would be accountable jointly for appointing and managing the relationship with a single marketing or advertising agency (with considerable digital media production and execution expertise and experience). The agency could also be engaged to develop the master brand, produce digital content, and schedule and manage its paid dissemination for both Campaigns.

Each Campaign manager would be accountable also for appointing a media relations (news and social) agency to focus on:
- for Campaign 1: earned (free) and paid dissemination of content; and
- for Campaign 2: a sole focus on news and social media.

The Campaign managers would be accountable also for appointing a web agency to develop and maintain the two master branded websites for Campaigns 1 and 2.

We recommend also that Campaign managers, in cooperation with the steering group, would be accountable for developing and agreeing Campaign performance indicators and approaches to measuring them based on the initial KPIs identified in this report.

It is recommended measurement be executed to understand Strategy and Campaign progress as well as its gaps and deficiencies; and to use data from measurement to inform ongoing tactics.

Estimated budget over two years to fund the Strategy and its two Campaigns.

We have not estimated the costs of the administration of the management and operation of the governance arrangements to oversee execution of the Strategy.

However, we have included the notional salaries over two years of the Campaign managers (x2) and the Campaign coordinators (x2) in the following budgets. We stress the budgets are notional, and based on our estimates of the components of Campaigns we have costed in the past.

The budget estimates are in 2016 $A.

(a) We estimate that depending on the elements of the Campaign to be implemented by industry and/or government, Campaign 1 is likely to be costed at about $5 million over 24 months (including establishment and production costs). A significant proportion of the Campaign 1 budget would be focused on meeting the costs of content generation and dissemination, and construction and maintenance of the master branded website. The digital nature of the Campaign means it will be far less expensive to develop than a mass market and mass media marketing and communications Campaign.

(b) We estimate that depending on the elements of the Campaign to be implemented by industry and/or government, Campaign 2 is likely to be costed at about $7 million over 24 months. A large cost element of that budget is represented by the commercial radio Campaign media buy, and the direct mail marketing execution. Focusing the radio advertising in high labour demand areas will be less expensive than a national, mass radio market execution.
Part 2 of this report comprises the analysis that informs the proposed Outreach Strategy and the two marketing and communications Campaigns that comprise its central elements.
Any outreach Campaign to promote jobs and careers in Tourism and Hospitality needs to be focused primarily at young people in the latter years of high school up to university age, must reach these Australians via digital channels primarily, and needs to focus on and realistically tackle negative community (including parent) perceptions about jobs and careers in the industry.

These are the conclusions of the small but influential industry stakeholders interviewed by ACIL Allen as an input to inform our recommended Strategy.

We note that some stakeholders indicated that issues such as overseas worker visa policy, and visa policies for overseas students in VET in Australia whose skills and capabilities were in demand, were issues relevant to meet existing and projected labour market demand.

However, these issues are not within the scope of our considerations nor inputs to developing a careers outreach Strategy.

2.1 ‘Jobs’ versus ‘careers’

Almost all stakeholders interviewed indicated that the 2016 Colmar Brunton research (see Methodology Chapter 5 of this report) confirmed the general sentiment they detect in the community that many students and parents in the community see employment in hospitality as “a job” but not as a “desirable career”.

Most stakeholders agreed the labour market for the industry comprises a large base of semi-skilled and skilled positions, inclining to a small apex of career positions, with supervisory and general management positions in between (a pyramid with a broad base).

Because of this, there was general agreement that:

— ongoing outreach to young people in particular, should be segmented to delineate between opportunities for ‘jobs’ (full-time and long-term, as well as casual and transitory), and ‘careers’ across different vocations, but which require more structure and longer-term commitment;

— ongoing outreach requires communication and focus that careers in the industry are multi-vocational and not all are customer facing (though customer satisfaction was at the heart of all jobs and careers in the industry) – and includes roles for example in finance, marketing, IT, general management;

— outreach needed to emphasise that skills and capabilities developed in the industry are ‘skills for life’ that can be used in other professions, careers, and workplaces, and are valuable across an individual’s lifetime; and

— the mobility of skills for people working in jobs or pursuing careers in the industry represent a “passport” for young people to be able to work across Australia, and the world.
2.2 Focus of an outreach Campaign

Stakeholders stated that like any other industry sector, many entry-level jobs in Tourism and Hospitality can be relatively low-paid, especially given the casualisation of many customer service and hospitality positions.

While the Colmar Brunton research (2016) found remuneration was seen by young people and their parents as one amongst many negative attributes of a career in Tourism and Hospitality, stakeholders interviewed offered that wages and conditions in many parts of the industry are primary factors for high turnover in some sectors.

“We seem to lose a lot of young people after a year or two to telcos or the airlines, where the wages are higher and the career paths are better understood”.

Industry stakeholder

There was consensus among stakeholders that the main focus of a careers outreach Campaign should be (not ranked in order of priority or preference):

— Tourism and Hospitality jobs, careers (and skills required and experience obtained) enable people in the industry to work across Australia and the world;
— jobs and careers in the industry are exciting, and provide people with the opportunity to achieve their goals, including the skills and experience to start their own businesses;
— there is incredible flexibility in the industry, allowing people to work in various locations and across the day and night to suit their lifestyles and life priorities; and
— working in the industry provides young people with an opportunity to develop skills and experience that they can use for the rest of their lives.

2.3 Don’t “reinvent the wheel”

All stakeholders supported a careers and jobs outreach Campaign for the industry, though some stakeholders stated that various Campaigns have been developed and existed already (e.g. Discover Your Career, NSW Government Level Up Hospitality Careers Campaign).

They supported an outreach Campaign that would be more than, as one stakeholder stated, “just one of a long progression of half-hearted efforts to meet the labour market challenges of the industry”.

It was important, most stakeholders said, that a new outreach Campaign could be sustained over a long period, and that it be developed around a brand and portal that became synonymous with finding everything that a young person needs to know about careers and jobs in the industry.

Stakeholders indicated that any careers outreach Campaign needed to include a “one-stop-shop” online portal or resource centre through which the young people (and their parents and careers advisers) wanting to work in the industry could have readily access to:

— what types of jobs and careers existed in the industry;
— the type of education and training required and available for jobs and careers that were available, where education and training was available, and its costs;
— how students can get work experience or internships in the areas where they live;
— career paths for various vocations in the industry, including professional vocations; and
— evidence-based “lived experience” vignettes and “case studies” of young people working in the industry talking about their job and career pathways.

2.4 Priority stakeholders and audiences

Most stakeholders interviewed have experience developing and/or managing and directing stakeholder awareness and marketing Campaigns.

They indicated they recognise that “in an ideal world” a Campaign could engage and seek to influence a broad spectrum of stakeholders.
However, there was consensus that young people should be the initial focus of a careers and jobs Outreach Campaign.

They stated by engaging young people with jobs and careers in the industry, there was an opportunity to spark the interest of their parents and other influencers.

“If the Campaign is supported by a single website portal – as it needs to be – that is where you need content also to draw in parents, and make sure careers advisors know about it as well, and that is where you get them to understand the opportunities that industry jobs and careers can offer their kids and family members”.

“Older Australians – especially if they are unemployed – are not going to make a sizeable dent in unmet (industry labour market demand). Retraining and entry-level wages are too much of a challenge for them at the moment”

Industry stakeholder

Mature age workers

While stakeholders recognise that older Australians – especially those who may be unemployed – are a potential source of unskilled and skilled labour, they are of the view that younger Australians will be more attracted to a career or a job in the Tourism and Hospitality industry, and that they should be the primary focus of an initial Outreach Campaign.

Some stakeholders suggested that if a Campaign under a master brand is effective, a component of the Campaign in later years could focus on attracting, informing, and influencing older Australians.

2.5 Other insights

Stakeholders supported also:

— the Outreach Campaign being supported by a central bank or repository of research and information to inform careers outreach efforts, including the proposed Campaign, on an ongoing basis;

— a master brand or Campaign identity under which all Campaign content and activities could be associated, with a view of creating awareness that the brand represented a ‘one-stop-shop’ for all information about jobs and careers in the industry; and

— an Outreach Campaign with a heavy focus on digital content, and most if its presence and engagement to be online to target audiences in all age groups.
This chapter presents the findings from marketing and communication Campaign analysis for local and international organisations promoting Tourism and Hospitality sector training and education programs. It gathers and analyses contemporary marketing and communication conventions employed variously across the sector for outreach awareness and engagement Campaigns.

3.1 Sector challenges to be supported by Outreach marketing and communication

Long-standing industry perceptions

The analysis reveals that the Tourism and Hospitality sector is acknowledged by prospective students/trainees as an area of opportunity for jobs. However, many prospective trainees, graduates and employees in the industry perceive there are few long-term career paths in either tourism or hospitality.

The industry is seen by many prospective employees and those who influence them, as one that does not reward — for example, in terms of salary, performance incentives, continuous training and development. In part, this accounts for the industry’s high rate of labour turnover. These perceptions inhibit attracting and retaining employees, and motivating students and trainees to pursue a career or job in the industry.

Disaggregated information for prospective students and trainees

Important data and information about the lived experience of education, training and work in an industry that can drive potential employees (and young people especially) to pursue a career in that industry, is disaggregated across public and private sectors.

The absence of a central and comprehensive Tourism and Hospitality resource for prospective students/trainees to draw upon to inform and engage them with training, education and employment opportunities is, we conclude, a critical gap in industry efforts to attract and retain labour.

ACIL Allen analysis of Outreach Campaigns in Australia and offshore (presented in this chapter) finds that private sector organisations such as industry groups or corporations typically focus their outreach to promote employment opportunities or training and education programs in either hospitality or tourism.

Some government entities have developed and manage information content-rich portals online. The portals provide information, tools, resources and links to support employers, education and training providers, trainees and students and prospective employees.
Personalised communication and engagement

Based on the research cited in this report (in particular Colmar Brunton and Deloitte) and ACIL Allen’s own analysis, young people and their influencers are the most likely group that need to be engaged to meet the demand for unskilled, semi-skilled, and high skilled labour in Tourism and Hospitality.

Given how Australians aged 15 years to 35 years find and consume information, contemporary digital communication across mobile, tablet and computer environments provide enormous opportunities for the Tourism and Hospitality sector to personalise information and communication for prospective trainees, graduates and employees.

The digital environment enables different training and employment experiences to be experienced first-hand.

Internationally, sovereign nation defence forces have become particularly adept at developing and managing highly effective careers Outreach Campaigns. These Campaigns seek to inform, engage and recruit young people into a broad range of education and training pathways, as well as general enlistment positions.

Branches of the defence forces of Australia, the UK, Singapore and the US manage especially effective Campaigns in terms of Strategy, content and recruitment success.

While we note that most defence forces require indentured or contracted commitments from trainees, students and other enlisted employees, this does not obviate or distract from the effectiveness of their career and general employment outreach.

This effectiveness includes highlighting the diversity of education and training opportunities, and the breadth of career as well as lower-skilled job opportunities across related trades, vocations and professions.

The Australian Defence Force Recruitment website provides a strong example of how digital communication can positively support training and career opportunities across different roles within a sector (see Figure 3.2).
3.2 Sector marketing and communication conventions

Tourism and hospitality communication channels

Our analysis of local and international sector marketing and communication Campaigns found commonality in what communication channels were selected to communicate and engage with the target audiences of outreach strategies.

However, limited evidence exists publicly as to the overall effectiveness of individual channels or Campaigns I (such assessments are most frequently conducted beyond the reach of public research, and in many instances are commercial-in-confidence).

Digital channels were most common. The most compelling digital channels made use of tools and approaches that promoted interaction and were characterised by interactivity that suggested and promoted dynamism and excitement.

The primary communication channels favoured for career outreach comprise digital and print-based communication, websites, video (YouTube), other social media channels, marketing communications (launches, competitions and editorials), as well as events, tours, conferences and careers shows and expositions (see Figure 3.3).
Internationally, the Tourism and Hospitality industry does not appear to invest significantly in above-the-line mass advertising, albeit education and training institutions are reasonably visible in print and television advertising (see Figure 3.4).

Websites represent a very important communication channel for career outreach. They allow for considerable information to be accessible by different segments of the existing and potential labour market (including parents influencing the job and career choices of young people).

Our analysis concludes the characteristics of the most effective career outreach websites include:

— strong dynamic and contemporary design with powerful imagery;
— simple, user-focused navigation; and
— relevant and rich content including:
  — sector performance, growth and positioning in the context of the nation (and frequently globally), the labour market, and the community (social purpose and/or impact);
  — career pathways (the lived experience of real people, case studies), advice on how to enter the career and make education and training, vocation and profession choices, including resume and interviewing tips, and career matching questionnaires;
  — employer profiles;
  — details about and links to credentialed training and education courses and institutions;
  — resource libraries and support networks;
  — links to social media and online conversations;
  — video content (case studies of students, career success stories, interviews with employees, showcasing different working environments); and
  — e-zines (magazine and newsletters published online only).
FIGURE 3.4  EXAMPLES OF TOURISM AND HOSPITALITY EDUCATION AND TRAINING INSTITUTION ADVERTISING FROM AUSTRALIA AND NEW ZEALAND

NOTE: WILLIAM ANGLISS WEBSITE, NEW ZEALAND SCHOOL OF TOURISM WEBSITE AND KANGAN INSTITUTE WEBSITE
SOURCE: HTTPS://WWW.KANGAN.EDU.AU

FIGURE 3.5  EXAMPLES OF CAREER RESOURCES AND TOOLS AVAILABLE ACROSS TOURISM AND HOSPITALITY WEBSITES

NOTE: VARIOUS WEBSITES DESIGNED TO SUPPORT THE TOURISM AND HOSPITALITY SECTOR
Social media environments – LinkedIn, Facebook, Twitter – are equally important as they enable prospective industry recruits to build an understanding of diverse career paths and roles. Their social nature allows prospective recruits to also interact with networks within the industry, and with other prospective trainees and employees.

FIGURE 3.6 EXAMPLES OF TOURISM AND HOSPITALITY CAREER SOCIAL MEDIA WEBSITES

![Image of social media websites](image)

**NOTE:** DISCOVER YOUR CAREER, LINKEDIN NEW ZEALAND AND SEEK NEW ZEALAND WEBSITES

**SOURCE:** HTTP://DISCOVERYOURCAREER.COM.AU, HTTPS://WWW.LINKEDIN.COM/COMPANY/TOURISM-NEW-ZEALAND, HTTP://WWWSEEK.CO.NZ/JOBS-IN-HOSPITALITY-TOURISM-AUCKLAND#AUCKLAND

YouTube, Vimeo and other video content websites are strong channels to demonstrate the benefits and opportunities of different roles and job functions within the sector.

Video content websites provide a space for showcasing case studies, advice and working environments based on real experiences. The medium employs video, which appeals strongly to viewers’ intuitive response to emotion, storytelling, social engagement and empathy with other people (“System One Heuristic thinking”). As such, they are a credible source of market intelligence for prospective employees and students.

FIGURE 3.7 VIDEO IS A POWERFUL AND EFFECTIVE MEDIUM TO ENGAGE POTENTIAL EMPLOYEES AND THEIR INFLUENCERS WITH JOB AND CAREER OPPORTUNITIES

![Image of video content websites](image)

**SOURCE:** HTTPS://WWW.YOUTUBE.COM/WATCH?v=QDUZNU7SMBS, HTTPS://WWW.YOUTUBE.COM/WATCH?v=SF5L24LO
3.3 Crafting opportunities for direct engagement and participation by potential recruits

An important element of successful outreach marketing and communication strategies is the opportunity they offer potential recruits to participate in familiarisation tours, mentoring workshops, job fairs, study tours, and industry conventions and job and career expos.

These engagement opportunities offer an industry and its players to reinforce positive messages and demystify negative or contested perceptions about the nature of jobs and career pathways.

Showcasing and providing access to student work experience and “school to work” transition programs are important also to deepen interest and drive commitment to study or work in the industry.

We recommend also that stakeholder engagement across all parts of the Tourism and Hospitality industry – enterprises, education providers, industry associations, employers, trades, hotels, tourism service providers, governments – is highly significant for ensuring alignment of outreach marketing programs and key messages among all players wanting to address unmet demand for labour.

3.4 Opportunity for a distinctive Tourism and Hospitality industry careers and jobs brand

The use of a contemporary consumer-facing education and training and jobs and careers brand has been effectively employed by British Columbia, Canada. Its go2HR brand provides an effective device for unifying employment, education and training, marketing and communication content for the province’s Tourism and Hospitality industry.

FIGURE 3.8 GO2HR - A SINGLE, UNIFYING BRAND DEVICE FOR TOURISM AND HOSPITALITY EMPLOYMENT AND CAREERS (BRITISH COLUMBIA, CANADA)

The colour (lime green) and memorable name were designed to appeal specifically to prospective students/trainees to drive interest, favourability and engagement with training, jobs, and careers in Tourism and Hospitality.

As a graphic device, the go2HR visual identity provides positive support for promotional and publicity purposes.
4.1 Introduction

This chapter provides an analysis of the Tourism and Hospitality labour market from three perspectives:

— as a growth area with national economic significance;
— its related vocational education and training profile; and
— employer, employee, and student perspectives of jobs and careers in the sector.

The chapter concludes by outlining the barriers identified to promote jobs and careers in Tourism and Hospitality.

The findings suggest gaps between current perspectives held by employers, employees and students, and the realities of work in the sector.

These findings provide additional opportunities for positive messaging, and addressing prevailing negative perceptions about jobs and careers in Tourism and Hospitality.

4.1.1 Summary of findings

Core opportunities for a job or career in the Tourism and Hospitality industry

— Jobs and careers in the three most notable and significant industry segments — cafés, restaurants and takeaway food services, retail trade, and accommodation — employ the most staff and contribute most to the economy.

— There appears to be little recognition that job and career opportunities exist in the sectors growing the most rapidly (cafés, restaurants and takeaway food services, ownership of dwellings, and education and training).

— All State and Territory governments are generally supportive of Tourism and Hospitality related vocational education and training (VET) to address skill shortages in their jurisdiction. Ninety per cent of Tourism and Hospitality related VET opportunities attract government-subsidies.

— As a result, more students are enrolling in related VET programs. The growing numbers of students receiving training in hospitality and tourism VET courses represent a population that is already interested in working in the sector.
Structural issues identified for the sector include:

— Generally, low profit margins, undeveloped human resources practices and management capacity in small and medium employers, remuneration and barriers for mature workers;

— The highly seasonal and localised nature of the industry, resulting in high employee turnover and vacancy rates, even for the fastest growing industries. For example, while the cafés, restaurants and takeaway food services industry employs the most people and contributes most to the economy, it is also suffering the higher turnover and vacancy rates; and

— The seasonal nature of Tourism and Hospitality work necessitating a flexible labour market, giving rise to roles that are characterised by low barriers to entry, casualisation, short term contracts, part time work, and reliance on a young workforce. As a natural consequence, labour mobility is high, and it is difficult to both attract and retain staff.

For complex and multifaceted reasons, the current vocational education and training system is not able to adequately support entry into the sector.

Despite government support for funding VET courses in areas experiencing high skill shortages, the level of public subsidies per course has been decreasing, and students are required to pay a larger share of the cost of their training. Higher study and training fees mean that students would be less likely to take up Tourism and Hospitality related vocational education and training in the future.

At the same time, the data suggests that completing a related VET course does not lead directly to a job and career in the sector. It is likely that participating in the VET system in itself is not enough to address negative perceptions around the lack of career pathways in the sector.

There is a disconnect between training content and what employers require of Tourism and Hospitality employees. Employers in the sector do not place high value on Tourism and Hospitality-related VET qualifications, preferring on the job training instead. This suggests a fundamental disjuncture between education and training programs (and government funding for those programs), and skills and education outcomes sought by industry. In the long term, entities including Austrade, the Department of Employment, and State employment and training agencies, need to work with industry to address this disconnection.

We note that such structural industry, employment and education issues fall outside the scope of this project. However, analysis in this chapter concurs with other sources (including the 2016 Colmar Brunton report). The same structural issues have been identified in numerous analyses of fundamental barriers to attracting and retaining employees to the industry. We counsel Austrade explores these issues in greater detail to identify long term solutions to the structural barriers cited.

Employers, employees and students are not aware of additional opportunities to obtain a job or develop a career in the sector

Additional opportunities to obtain a job or develop a career in the Tourism and Hospitality industry include:

— the significance of contributing to, and being part of, a sector that continues to play a growing part in the national economy;

— opportunities that exist in specific growth sectors (cafés, restaurants and takeaway food services, retail trade, and accommodation);

— opportunities that exist to obtain managerial level positions with strong career and progression pathways. For example managerial level roles in cafés and restaurants, and hotels and motels, are projected to have the highest vacancy rates; and

— opportunities to work in alternative roles. For example with ‘ownership of dwellings’ being a top growth industry, ‘being your own boss’ could be a real and viable long term goal for employees and students.

These opportunities do not feature in the list of positive attributes identified by employers, employees and students in the 2016 Colmar Brunton research.

The availability of these opportunities will be useful in crafting targeted, positive massages as part of an Outreach Strategy to promote jobs and careers in the industry. The career pathways they offer
directly address some of the negative perceptions about working in the industry, including the perceived paucity of opportunity for career progression and development, and lack of job security.

4.2 Tourism and hospitality labour market and the national economy

The Tourism and Hospitality sector is a significant contributor to the Australian economy, providing a broad range of social, cultural, environmental, and employment benefits.

In the 10 years to 2014-15, direct tourism gross domestic product (GDP) grew by an average of 2.3 per cent annually, relative to the overall Australian economy which grew at an average rate of 2.8 per cent over the same period. Direct tourism gross value added (GVA)\(^2\) has increased at an average rate of 2.4 per cent annually from 2005-06. The Tourism and Hospitality sector accounts for 3.0 per cent of national GDP, compared to agriculture’s share of 2.2 per cent and mining’s share of 8.7 per cent (ABS 2016).

Growth in Australia’s Tourism and Hospitality sector is expected to continue, assisted by the low Australian dollar and the economy-wide transition from the mining boom (Tourism Research Australia 2015). The number of tourism trips has increased on average by 2.5 per cent over the past decade, and is expected to continue rising (ABS 2016) (see Figure 2.1).

The number of international visitors is projected to grow by almost two percentage points between 2015 – 2020 (higher per annum than 2011-15). Expenditure per night is expected to increase also (DAE 2015).

Based on ABS classifications, the Tourism and Hospitality sector includes a range of ‘tourism characteristic’ or ‘tourism connected’ subsectors or industries.

Of these industries, ‘accommodation’ contributes most to the sector in terms of GVA (16%), followed by ‘air, water other transport’ (14%), ‘retail trade’ (13%), ‘cafés, restaurants and takeaway food services’ (12%), ‘ownership of dwellings’ (9%), and ‘education and training’ (8%) (ABS 2016).

\(^2\)The value of the output of tourism products by industries in a direct relationship with visitors, less the value of the inputs used in producing these tourism products.
Since 2005-06, there has been significant growth in ‘cafés, restaurants and takeaway food services’ and ‘ownership of dwellings’. ‘Education and training’ is also a growth industry, although at a less consistent rate industry. (Figure 4.3)

4.2.1 Labour market profile

In 2014-15, the Tourism and Hospitality sector directly employed more than 580,000 full- and part-time employees, representing an increase of more than 6 per cent from the previous year (ABS 2016 (figure 4.4)). Employment growth has averaged 1.3 per cent annually over the last ten years, compared to 1.9 per cent employment growth for the overall economy.

When indirect employment is included, the sector employs about 925,000 people — more than 8 per cent of total national employment (Tourism Research Australia 2015). This compares to agriculture employment in which accounts for 2.7 per cent of total employment and mining with
Almost 80 per cent of the sector’s labour demands are satisfied by local workers (Figure 4.5). Other Australian workers, either from within the relevant state or from interstate, form the next largest portion of the workforce.

There is only a small minority contingent from ‘international sources’. Working holiday makers and temporary skilled migrants contributed seven per cent of the national tourism labour force in 2015. The proportion of international employees has fallen from 13 per cent in 2011, which is attributed to an increase in available domestic labour (DAE 2015).
The labour profiles of different industries within the sector vary across a number of measures, including total employment, full-time employment, and female employment (Figure 4.6). Across the sector 55 per cent of employment is full time, relative to 68 per cent in the general economy. Woman make up 54 per cent of the tourism workforce, while the figure is 46 per cent across the economy.

The cafés, restaurants and takeaway food services industry employs a significantly higher number of workers than other sectors – 156,000, with more than 99,000 part-time employees.

Retail trade and accommodation are also significant employers, with 99,600 and 87,500 workers respectively.

In contrast to the cafés/restaurants industry, both retail and accommodation employ more full-time workers than part-time.

These three industries are the clear leaders in employment demand, with the next highest number of employees in education and training, with 44,600 workers in 2014-15.

They are also significant contributors to the sector in terms of GVA each in the top four. Air, water and other transport is also in the top four in terms of GVA contribution, however employs only 38,400 people.

The industries with the highest proportion of female employees are education and training (70 per cent), travel agency and tour operator services (64 per cent) and accommodation (63 percent).

High turnover of employees, labour mobility and a largely casual workforce are key industry characteristics.

Much Tourism and Hospitality activity is seasonal and highly localised. As a result, the labour profile of the sector generally varies based on seasonal demand throughout the year and across the country (51 per cent of businesses in the Australian Tourism Labour Force Report: 2015-2020 reported being seasonal (DAE 2015)).

The average employee turnover rate was 66 per cent in 2014 (up 3 per cent from 2011). Only 35 per cent of workers are considered full time. Western Australia has the highest turnover rate, in part due to the state’s heavy reliance on international workers.

The average vacancy rate was seven per cent, with New South Wales and Victoria reporting the highest numbers of currently unfilled positions (10 per cent), followed by South Australia (9 per cent) and Western Australia (7 per cent). The three smallest states reported the lowest vacancy rate. See Figure 4.7 below.
Industry differences can also be seen in turnover rates and unmet demand, including for skilled labour.

The cafés, restaurants and takeaway food services industry in particular has considerably higher vacancy and turnover rates, and identifies greater difficulties in attracting and retaining sufficient numbers of skilled workers (DAE 2015).

According to the Australian Tourism Labour Force Report: 2015-2020, surveyed businesses experience:

- higher turnover rates (88 per cent compared to 66 per cent sector average);
- higher vacancy rates (9 per cent compared to seven per cent 7% sector average);
- more skills deficiencies in their staff (81 per cent of employers felt that staff were not appropriately skilled for their position compared to 69 per cent sector average);
- more difficulty recruiting staff (71 per cent compared to 51 per cent sector average); and
- more difficulty retaining staff (52 per cent compared to 36 per cent sector average).

The accommodation industry, by contrast, identifies as less seasonal than other industries, and has a vacancy and turnover rate less than the sector average.

According to the Australian Tourism Labour Force Report: 2015-2020, surveyed businesses report:

- lower vacancy rate (5 per cent, below the 7 per cent sector average);
- lower turnover rate (51 per cent, significantly lower than the 66 per cent sector average);
- less difficulty recruiting staff (66 per cent compared to 69 per cent sector average); and
- less difficulty retaining staff (27 per cent compared to 36 per cent sector average).

The Tourism and Hospitality sector also features significant regional diversity and a high degree of localisation in its labour demands, which reflect seasonal differences and the wide distribution of tourism points of interest.

For instance, the high-density, high-profile tourist attractions of Sydney and Melbourne combined account for 45 per cent of total national labour demands (DAE 2015).

### 4.2.2 Future labour demand and skills shortages

Demand for employees in the Tourism and Hospitality sector has been increasing steadily in recent years, and, as illustrated in Figure 4.8, direct employment demand is projected to be almost 640,000 by 2020 (DAE 2015). This equates to 4.1 per cent growth in labour demand per year, significantly higher than the 2.7 per cent annual growth that occurred between 2011 and 2015 (DAE 2015).
Under this forecasted increase in labour demand, the sector will require an additional 123,000 new accumulated workers by 2020, including 59,500 accumulated skilled workers.

Projections indicate that this demand will be unable to be met in full, especially the demand for skilled labour—the Australian Tourism Labour Force Report: 2015-2020 estimates that the skilled labour shortage will grow by over 30,000 workers to 2020 (DAE 2015).

The top five occupations by projected skills shortage are café and restaurant managers, automobile drivers, chefs, waiters and kitchenhands.

These occupations will account for over half of the total shortage by 2020, almost 16,000 workers (DAE 2015).

An overview of the labour demands and skills shortage for selected occupations is provided in Figure 4.9. It indicates the current (2015) level of employment, the additional demand to 2020, and the skilled labour shortage.

The skills shortage will be greater than 50 per cent of accumulated labour demand forecast for automobile drivers, chefs and interestingly, managerial level staff at hotels and motels and café and restaurants.
Forecast accumulated labour shortages vary across states, with those states seeing the strongest growth in visitor nights having the fastest increase in labour demand (Figure 4.10). Across Australia, the forecast shortage represents 4.8 per cent of the existing workforce, with the shortage in Victoria representing the largest share of the current tourism workforce.

The anticipated skills shortage may be compounded by a reported skills deficiency (where employees lack either the skills, qualifications or experience for their role)—69 per cent of businesses identify skills deficiencies within their employees, a 19 percentage point increase from 2011 (DAE 2015).

A lack of experience in the sector, and misalignment between capability and the requirements of the role were the most commonly identified reasons for skills deficiencies in employees. Employers considered skill deficiencies to be a greater problem for their businesses than recruitment and retention (DAE 2015).

It will be essential to address skill shortages, deficiencies, and other barriers to careers in the sector in order to capture the growth opportunities offered in coming years.
4.3 Tourism and hospitality vocational education and training (VET)

Vocational education and training (VET) plays a critical role in ensuring that Australians have the specific and transferable skills necessary to participate and be productive in the labour market, and contribute to economic growth.

VET programs are developed to equip students with the skills they need to make them ‘job ready’. VET courses provide students with practical training at the operational level (such as chefs or drivers) as well as management level (such as motel manager), depending on the level of qualification completed.

Training in the Tourism and Hospitality sector has traditionally occurred in the Vocational Education and Training (VET) sector.

Many professionals in the field started their careers through a VET qualification, at the certificate, diploma and advanced diploma levels. Due to the practical nature of the Tourism and Hospitality sector, industry placements are included in many of the courses.

State and Territory governments direct fund VET courses as a means to address skills shortages within their jurisdictions. Government subsidies are provided on a range of Tourism and Hospitality related VET courses, the value of which are usually determined based on their labour market value.

The majority (90 per cent) of tourism, hospitality and events training is government-subsidised. However, government subsidies have been decreasing in recent years, which may be adversely affecting enrolment numbers.

The levels of government funding in Tourism and Hospitality related VET courses directly affects student uptake of, and thus interest in, jobs and careers within the sector.

This section provides an overview of the Tourism and Hospitality related skills training and qualifications available in Australia.

4.3.1 Enrolment in Tourism and Hospitality

VET in Australia is structured around groups of qualifications called ‘training packages’. The training package for the tourism sector is the ‘Tourism, Hospitality and Events’ package, which includes 51 qualifications.

Figure 4.11 sets out the 10 Tourism, Hospitality and Events qualifications with the most enrolments in 2014, disaggregated by provider type. Certificate II in Hospitality and Certificate III in Hospitality account for more than a third of enrolments.

FIGURE 4.11 TOP 10 QUALIFICATIONS IN TOURISM, HOSPITALITY AND EVENTS, BY PROVIDER TYPE, 2014

Note: ‘Other providers’ refers to universities, community education providers and enterprise providers.
SOURCE: NCVER 2016
In 2014\(^3\), there were 255,000 enrolments across the ’Tourism, Hospitality and Events’ package\(^4\). The majority (approximately 80%) are enrolled in basic (Certificate II) or entry level (Certificate III) qualifications. See Table 4.1.

**TABLE 4.1** OVERVIEW OF TOURISM, HOSPITALITY AND EVENTS ENROLMENTS, 2014

<table>
<thead>
<tr>
<th>Number of qualifications</th>
<th>Enrolments</th>
<th>(share)</th>
<th>Share of enrolments employed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificate I</td>
<td>3</td>
<td>11,027</td>
<td>(4%)</td>
</tr>
<tr>
<td>Certificate II</td>
<td>7</td>
<td>99,425</td>
<td>(39%)</td>
</tr>
<tr>
<td>Certificate III</td>
<td>18</td>
<td>99,966</td>
<td>(39%)</td>
</tr>
<tr>
<td>Certificate IV</td>
<td>14</td>
<td>21,748</td>
<td>(9%)</td>
</tr>
<tr>
<td>Diploma</td>
<td>5</td>
<td>17,929</td>
<td>(7%)</td>
</tr>
<tr>
<td>Advanced Diploma</td>
<td>4</td>
<td>5,211</td>
<td>(2%)</td>
</tr>
<tr>
<td>Total</td>
<td>51</td>
<td>255,306</td>
<td>-</td>
</tr>
</tbody>
</table>

*Source: NCVER 2016*

More than half of students are 15-19 years old, with a concentration of this age group at the Certificate I and Certificate II levels (Figure 4.12).

**FIGURE 4.12** TOURISM, HOSPITALITY AND EVENTS ENROLMENTS BY AGE GROUP, 2014

![Tourism, Hospitality and Events enrolments by age group, 2014](image)

Note: Certificate IV and above includes: Certificate IV, Diploma and Advanced Diploma.  
*Source: NCVER 2016*

Students already enrolled, or interested in enrolling, in Tourism and Hospitality VET qualifications represent a ready captive, relatively engaged and interested audience for directing an Outreach Strategy (see Appendix B for detailed analysis on enrolments in Tourism and Hospitality VET qualifications).

### 4.3.2 Government-subsidised training since 2009

Government-subsidised Tourism, Hospitality and Events training generally increased 36 per cent from 2009 to 2014. Most of this increase took place in 2010, with a fall in enrolments in 2013, before zero growth in 2014. Certificate III qualifications have seen the greatest increase, while Certificate II

\(^3\) The latest year for which data are available, NCVER 2016.  
\(^4\) VET in Australia is structured around groups of qualifications called ‘training packages’. The training package for the tourism sector is the ‘Tourism, Hospitality and Events’ package, which includes 51 qualifications.
enrolments have fallen 26 per cent since 2012. Higher level qualifications grew strongly to 2012, before stabilising.

**FIGURE 4.13** GOVERNMENT-SUBSIDED TOURISM, HOSPITALITY AND EVENTS ENROLMENTS BY QUALIFICATION LEVEL, 2009-2014

A number of states have seen considerable government-funded growth in Tourism, Hospitality and Events enrolments since 2009 (**Figure 4.14**). Enrolments tripled in South Australia to 2013, before falling sharply in 2014. Victoria and New South Wales also saw enrolment growth, with training up 50 per cent since 2009. Enrolments have fallen over 2009-2014 in some of the smaller jurisdictions—down 40-50 per cent in Tasmania and NT.

**FIGURE 4.14** GOVERNMENT-SUBSIDED TOURISM, HOSPITALITY AND EVENTS ENROLMENTS BY STATE, INDEX, 2009-2014

Changes in enrolment numbers are driven by a variety of factors, although recent changes in governments’ VET policies, including funding subsidies for particular courses, have been critical drivers behind the uptake of training. The contraction in training across a number of states is due to the introduction of policies aimed at checking the unexpectedly high level of training delivery that occurred post-liberalisation of some VET sectors.
4.3.3 Government subsidies and student fees

State governments provide subsidies to a variety of VET courses, often on the basis of the labour market value of the course. Some states also set student fees, while others do not regulate fees and let training providers charge as they see fit (see Appendix B for a detailed breakdown on government subsidies for Tourism, Hospitality and Events courses).

Student fees may impact decisions around training take-up. Figure 4.15 illustrates NSW student fee levels for 2016 for the nine qualifications with the highest number of enrolments in Australia in 2014 (NSW does not subsidise the Certificate I in Hospitality).

Fees vary based on Certificate level, and average $870 at the Certificate II level, and $1,887 for Certificate III courses. (Victoria and Queensland do not regulate fees, and no data is available on average fees for these states.)

Note: NSW does not subsidise or regulated fees for the Certificate I in Hospitality

FIGURE 4.15 SUBSIDY RATES AND REGULATED FEES FOR TOURISM, HOSPITALITY AND EVENTS QUALIFICATIONS, NSW, 2016

The data suggests a link between the level of government subsidies, student fees and uptake in Tourism and Hospitality VET qualifications. Rising student fees have a potential to deter uptake of VET training and entry into the sector. It may also exacerbate existing negative perceptions of the poor job and career opportunities in the sector.

4.3.4 Career pathways in Tourism and Hospitality

Career pathways in the Tourism and Hospitality VET courses are complex and are in line with negative perceptions held by students and employees.

Figure 4.16 outlines the nebulous career and skills pathways flows within the Tourism and Hospitality training package.
There is a lack of clarity on career pathway and progression opportunities, even within the formal accredited training VET system itself. Arguably this is related to the ambiguous job outcomes from obtaining education and training in Tourism and Hospitality related VET qualifications (discussed in the next section).

4.3.5 Outcomes and impact of training

From a student perspective, outcomes from obtaining VET training in tourism related courses are generally positive but do not necessarily lead to a job or career in the sector.

Of those not employed prior to Tourism, Hospitality and Events training, 45 per cent were employed after training, indicating training is an important pathway to work. However, only 29 per cent of graduates are employed in the same occupation as the training course.

Tourism, Hospitality and Events training graduates employed full-time after training have an average salary of $47,100, 17 per cent lower than all graduates ($57,000).

Employers are lukewarm about the benefits of formal accredited in Tourism and Hospitality VET training

The NCVER Survey of Employer Use and Views of the VET System is carried out every two years, and reports on employers use and views at the ANZSIC industry level. The survey highlights that accredited formal VET training is less important to employers in the Tourism and Hospitality sector than other sectors.

Employers in the three largest Tourism and Hospitality sector industries (Accommodation and food services; Transport, postal and warehousing; and Retail trade) use the VET system less than average
(Figure 4.17). This is particularly pronounced in the Transport, postal and warehousing industry where less than 30 per cent of employers used the VET system in the last month, while more than half of employers across the economy used the VET system.

The sector also uses much more unaccredited training than other industries.

**FIGURE 4.17 EMPLOYERS USING THE VET SYSTEM**

[Chart showing employers using the VET system by industry over time.]

Note: Industry is defined by the Australian and New Zealand Standard Industry Classification (ANZSIC 2006). This is an Australian Bureau of Statistics classification that identifies the industry or principal activity in which an employer is engaged. Industry is defined based on survey responses.

SOURCE: NCVER 2015

This is in line with findings from known research on employer perspectives, namely that employers value on the job training sector experience over formal structured education and training (Colmar Brunton 2016; DAE 2015) (see section 4.4.1). This suggests that as it currently stands, skills training and education is not enough in itself to attract and retain employees to the sector.

**FIGURE 4.18 EMPLOYERS USING UNACCREDITED TRAINING IN THE LAST 12 MONTHS**

[Chart showing employers using unaccredited training by industry over time.]

Note: Industry is defined by the Australian and New Zealand Standard Industry Classification (ANZSIC 2006). This is an Australian Bureau of Statistics classification that identifies the industry or principal activity in which an employer is engaged. Industry is defined based on survey responses.

SOURCE: NCVER 2015
### 4.4 Employer, employee and student perspectives of careers in Tourism and Hospitality

#### 4.4.1 Employer perspectives

Businesses and employers tended to view a career in the Tourism and Hospitality sector as ‘intrinsically rewarding’ as it allowed employees to make others happy and create positive experiences for customers (Colmar Brunton 2016). This was also mentioned by the mature people surveyed for the Colmar Brunton report.

Employers acknowledged that many young people, including students, enter the industry as a ‘stepping stone’, however this was seen to offer some benefits for businesses, such as the provision of a casual workforce to fill the high number of casual positions.

The perceived lack of prestige and lack of an apparent career path within the sector were considered to be negative (Colmar Brunton 2016). Industry human resources and management capacity was in some ways seen to contribute to the lack of training opportunities and remuneration levels for staff. This is discussed further in section 4.4.3.

Employers’ perspectives on careers in the Tourism and Hospitality sector were different to those of employees, although employers could identify a range of key perceptions held by employees and students towards the sector, such as that it offered unsociable working hours, lower pay rates, and limited career paths (Colmar Brunton 2016).

Sixty nine per cent of businesses surveyed in the *Australian Tourism Labour Force Report: 2015-2020* identified skills deficiencies among their staff. This was seen as a greater problem for businesses than recruitment or retention. Relevant experience is highly valued by employers in the sector, and tends to be preferred over formal qualifications (Colmar Brunton 2016; DAE 2015).

#### 4.4.2 Employee perspectives

Current and recent employees across a broad age range (between 25-35 years, over 50 years) have similar perspectives of careers in the sector in many ways, and they are also similar to students’ perspectives (Colmar Brunton 2016).

The key positive features of a career in tourism or hospitality were perceived to be the opportunity to engage with a diverse range of people, the flexibility of hours, and the development of skills that can facilitate domestic and overseas travel.

Interestingly, a number of these are also linked to issues perceived to be negative features of work in the sector, such as interaction with difficult or rude customers, the length of shifts and the sometimes unsociable work hours. Limited opportunity for career development was also commonly identified as a negative feature of employment in the sector (Colmar Brunton 2016).

Employee perspectives varied in some ways depending on age, with younger, more recent employees mentioning the relative ease of finding a job and the ‘fun and social’ nature of the work as positives, while mature employees discussed the personal satisfaction they found in providing a positive experience for customers and the opportunity to learn about other cultures.

The variety of work and travel-related benefits, as well as the opportunity to play a role in an important industry for the nation were also raised by mature workers. Additionally, mature employees found the seasonal and cyclical work flows, and the highly casualised nature of the sector to be negative (Colmar Brunton 2016).

Employees noted that most of the businesses they had worked for in the sector had high turnover, with average employee turnover of about 66 per cent in 2015 (Colmar Brunton 2016; DAE 2015).

Employees commonly attributed this to employers not valuing staff and ‘treating them like a number or commodity’; while the employers’ perspective was that staff felt their roles were too difficult and that jobs were seen as a short-term option (Colmar Brunton 2016; Ackhurst & Lovedor 2015).
4.4.3 Student perspectives

Secondary students’ perspectives of a career in the Tourism and Hospitality sector are largely in line with those of employees. Although most students were ‘reasonably positive’ towards a career in the sector, in general, few were seriously considering one (Colmar Brunton 2016).

The key positive aspects of Tourism and Hospitality careers identified by students were: meeting a diverse range of people, the diversity of roles and the opportunity for travel (these also featured among employees’ views). Students and younger employees (aged 25-35 years) who had recently left the sector also saw the large number of entry level positions as a positive (Colmar Brunton 2016).

Students also recognised many of the negative features of a career in the sector that were identified by current and recent employees, including the length and unsociability of hours, having to deal with difficult or rude customers, and the lack of opportunity for career advancement in a reasonable timeframe.

Students also believed that the sector would provide low pay relative to others, although this was a lesser concern to them (Colmar Brunton 2016). In general, students’ knowledge of training and career pathways in the sector was low, and although they could often identify particular jobs in the sector, they were less able to name careers or development pathways (Colmar Brunton 2016).

Colmar Brunton (2016) found that for most students, a career in the Tourism and Hospitality sector was ‘not on the radar’, although students had questions regarding what such a career would involve. Career exhibitions and career counsellors were identified as avenues through which students had discovered information about careers, however feedback from students was that these did not greatly feature Tourism and Hospitality careers.

Parents’ views were also important for students in their career considerations, and students commonly noted that their parents were asking them to consider the longer term aspects of potential careers, such as job security and progression opportunities (Colmar Brunton 2016). Given the common perceptions of careers in the Tourism and Hospitality sector as providing few permanent positions and relying on seasonal workflows, as well as offering limited career pathways, this may influence students’ opinions.

4.5 Barriers to careers in Tourism and Hospitality

4.5.1 Lack of information

Lack of information regarding career opportunities and pathways—as well as other aspects of a career in the sector, such as remuneration and day-to-day activities—is a barrier for students in considering Tourism and Hospitality career options. The Tourism, Travel and Hospitality Workforce Development Strategy 2014-2019 (DAE 2015) notes that while there are many non-linear career pathways available in the sector, they have not been ‘adequately articulated’ (Skilled Services Australia 2013).

Although in general students in the Colmar Brunton study (2016) had a positive attitude towards work in the sector, describing it as ‘fun’ ‘dynamic’ and ‘sociable’, few were genuinely considering the sector as a potential career.

Few students said they had received information relating to Tourism and Hospitality careers from school careers counsellors or career expos, and in general their knowledge of the training and career pathways offered in the sector was low.

Students expressed a desire to know more about the details of careers in the Tourism and Hospitality sector, including expected activities or ‘a day in the life’, expected salary, education and qualification requirements, and how such jobs can be accessed (Colmar Brunton 2016).

A lack of information about career pathways was also identified by parents, who can have important influences on their children’s career decisions.

While parents considered there to be many entry-level jobs in the sector, they were generally unaware of further career pathways and perceived the sector to be relatively unsuited to long-term careers due to the ‘tenuous’ nature of positions and their inability to accommodate life changes such as raising a family (Colmar Brunton 2016).
4.5.2 Lack of defined career pathways

The lack of defined career pathways and limited career development opportunities are commonly identified as negative features of the sector by employees and students, and are acknowledged by employers to be ‘relatively scarce’. Employers also recognised that these are among the perceptions young people hold that may discourage them from entering the industry (Colmar Brunton 2016).

The structure of the sector, with its large proportion of small businesses and seasonal workflow, does not naturally offer as many linear long-term career pathways as other sectors, and many business owners feel they are not able to provide them (Colmar Brunton 2016).

However, this does not mean that there are no career development opportunities within the sector, and the perception that this is the case may be due to a lack of information or communication. Additionally, career pathways, and perceptions about these paths, vary within the sector.

While larger companies were seen as able to provide greater opportunities for career progression within the business, the less-linear avenue of business ownership was seen as the career pathway for employees at small businesses (Colmar Brunton 2016).

4.5.3 Structural issues in the sector

Seasonal and variable nature of work

Employees consistently identified the seasonal and variable nature of work within the sector as an issue. The seasonal and cyclical nature of work was seen to encourage workforce casualisation, leading to fears of job insecurity and underemployment (Colmar Brunton 2016).

Fifty-one per cent of businesses in the Tourism and Hospitality sector identified as seasonal in 2015, an increase from 47 per cent in 2011. This has flow-on impacts for employment, with full-time employees accounting for only 35 per cent of the workforce in this sector, compared to 70 per cent across all sectors (Deloitte, 2015).

Additionally, the variable nature of work in terms of length and timing of shifts was also seen as a problem by many employees. Mature workers identified the length of shifts as a physical barrier as they were often on their feet for long periods of time, while current and recent employees across age brackets considered the length and unsociability of working hours to be an issue (Colmar Brunton 2016).

Low profit margins

Industry capacity and structure was in some ways seen to contribute to the lack of training opportunities and the comparatively low salary for careers in the sector. The structure of the industry, consisting of mostly smaller businesses with low margins, makes it difficult for Tourism and Hospitality to compete on pay rates with other sectors (Skilled Services Australia 2013).

Employers identified the tight profit margins in the industry as a barrier to improved sectoral workforce prospects with regards to both remuneration and training. For example, employers felt that the low profit margins in their businesses meant there was not enough time to provide the ideal level of training to new staff before they began working autonomously, or that it was not feasible for staff to take time off for training as this directly impacted productivity (Colmar Brunton 2016).

Additionally, employers referenced tight margins as a reason for the wage level and trend toward casualisation of the workforce, with casual employment structures seen to provide greater flexibility and lower cost for businesses (Colmar Brunton 2016).

Undeveloped human resources practices and management capacity in small and medium employers

Both employees and employers in Tourism and Hospitality acknowledged the presence of undeveloped human resources practices, and to some extent also management capacity, in the sector. This was attributed to the dominance of small and medium-sized businesses operating on low margins across the sector.
Employees and employers each identified differences in the human resources support available in small and medium businesses versus large companies (Colmar Brunton 2016).

Training and education opportunities were seen to vary between small/medium businesses and large companies, with mature people feeling that further training would not be of benefit for their careers, unless they were employed with larger companies, where more training and progression opportunities were provided.

Employees also considered there was better staff attraction and retention at the larger companies. Employers recognised that larger companies had better access to and capacity for training and human resources activities, as well as structured career pathways (Colmar Brunton 2016).

The most common response by employers to identified employee deficiencies was to establish flexible working arrangements.

This was favoured above providing or encouraging staff to undertake formalised training, whether internal or external. Developing workforce plans was the least common response from businesses as a means of addressing their identified employee deficiencies (DAE 2015).

The Tourism, Travel and Hospitality Workforce Development Strategy 2014-2019 (DAE, 2015) recognised the need to develop human resources practices and management capacity in small businesses, noting:

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

*Skilled Services Australia 2013, p.24*

This reflects comments made by young people who have recently left the sector, who reference ‘poor management practices’ and observe that younger people may be exploited if they do not know their employment rights (Colmar Brunton 2016).

### 4.5.4 Disconnect between industry training and employer needs

There is concern in the Tourism and Hospitality industry about the consistency and quality of available training (Skilled Services Australia 2013).

A lack of relevant experience is identified as the most common reason for employees’ skills deficiencies in the *Australian Tourism Labour Force Report: 2015-2020*, followed closely by employers identifying a misalignment between employee capability and the role requirements (DAE 2015).

These issues were considered to be more critical than the provision of training – thus there seems to be a perception among businesses that employees are simply ‘not “tourism ready’” (DAE 2015).

Additionally, employees themselves may find it difficult to make the connection between the skills and knowledge they have acquired during formal education, such as VET courses, and those used daily in a job in the sector, and this is thought to be a barrier for graduates desiring to enter the labour market (Ackehurst & Lovedor 2015).

The practical nature of the industry means that certain types of training, such as online training, are not appropriate, and employers identify on-the-job training as the most effective form of training for staff (Colmar Brunton 2016; Skilled Services Australia 2013).

This is particularly the case for small and medium operators, who have often ‘worked their way up’ in the industry without formal qualifications and thus do not see a great need for staff to have them (Colmar Brunton 2016).

Some level of practical industry experience was seen as beneficial, and this was reflected in recruitment practices. However, employers who themselves held tertiary-level qualifications placed greater value on similar level qualifications in their staff.
On the whole, employers did not consider it an advantage for staff to hold a formal qualification without industry experience, and they felt that at times this could have negative consequences if staff expected to enter the industry at a higher level or had unrealistic expectations of their work role or pay (Colmar Brunton 2016).

4.5.5 Remuneration

There is a broad perception that remuneration in the Tourism and Hospitality sector is low relative to other sectors. This was identified by many groups, including current and recent employees across age levels, secondary students and parents, and under- and unemployed mature workers. Employers also felt that this was one of the perceptions of the industry held by young people, although they did not necessarily agree with this view (Colmar Brunton 2016).

While employers perceived that the general remuneration level in the sector could not compete with other sectors, such as mining and trades, they did not necessarily feel that employees were underpaid, or that there was capacity for the industry to increase salaries.

Low margins and the structure of the work, plus the large proportion of business costs attributable to wages, were identified as incentives for employers to minimise labour costs, often through casual employment (Colmar Brunton 2016; Skilled Services Australia 2013).

4.5.6 Barriers for mature workers

Mature workers, both those currently employed within the sector and those currently under- or unemployed, perceived age discrimination to be an issue, restricting their opportunities for entry to and promotion within the sector. This view was reflected in employers’ comments, to some extent, with a number of employers indicating that they preferred to hire young staff so they did not have to ‘fix’ existing bad habits (Colmar Brunton 2016).

Mature employees felt that employers preferred to provide opportunities, both in terms of entry to the job market, and promotions once employed, to younger people. They also held the view that younger staff were ‘complicit’ and happy to take casual shifts because they were using the money to fund other activities, such as university studies or travel, rather than motivated by a specific passion for the sector (Colmar Brunton 2016).

In contrast, mature people were more likely to comment that they felt pride in their participation in the sector and the opportunity it provided to ‘make people happy’ and create positive experiences for customers.

The mature employees surveyed in the Colmar Brunton study (2016) suggested a number of ways employers could reduce turnover rates, including treating staff with more respect, and considering attitude and motivation while recruiting, rather than ‘just [hiring] people that are young and want a job’. However, more than 50 per cent of businesses surveyed in 2015 revealed they were exploring mature people as an alternative labour source, more than were considering alternative labour pools such as young people or overseas workers, and significantly more than were considering Indigenous workers or workers with a disability.

This figure was greater than 60 per cent for the restaurant and café sub-sector (Deloitte 2015). There was also a view among some employers that in general young people were less willing to stay in a job that was not meeting their expectations than previous generations had been (Colmar Brunton 2016).

Additionally, mature age workers were identified as a key labour source in the Tourism, Travel and Hospitality Workforce Development Strategy 2014-2019 as the labour needs of the sector, in terms of seasonal and casual work, were seen to be aligned with many mature workers’ needs for flexible work and potential desire for semi-retirement (Skills Services Australia, 2013).

This was reflected in mature workers’ perceptions of jobs in the sector, with many commenting that the flexibility suited their lifestyles. However, the casualisation of the workforce and lack of permanent positions was also seen as a negative feature of the sector by some mature people (Colmar Brunton 2016), and may depend on individuals’ career and lifestyle needs and aspirations.
The Outreach Strategy was developed based on findings from four research streams.

1. Analysis of the key reports — Tourism and Hospitality Careers March Report (Colmar Brunton, 2016) and Australian Tourism Labour Force Report: 2015-2020 (Deloitte Access Economics, 2015) — to capture the key findings on the Tourism and Hospitality industry and perceptions of working in the sector that the Outreach Strategy would need to address.

2. Analysis of industry stakeholders’ insights — person to person interviews conducted with eight stakeholders with a significant interest in the Outreach Strategy. The interviews were framed by a discussion guide, as agreed with Austrade. See the Discussion Guide at Appendix C.

3. Desktop review of strategies and Campaigns — to identify effective outreach strategies, communication channels and Campaigns focused on skills and careers.

4. Analysis of labour market and vocational education and training options — to identify conditions, barriers and opportunities that may have an impact on the Outreach Strategy and its execution.

Each recommended pillar of the Strategy was tested and verified against the outcomes and findings of the above analysis.
APPENDICES
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B.1 Key definitions

Tourism and hospitality, as a sector of the economy, is defined according to the status of the consumer, rather than the goods and/or services it produces (which is the more common definition of an industry) (ABS, 2016).

As a result, the Australian Bureau of Statistics (ABS) definition of the tourism sector does not align with the commonly used Australian and New Zealand Standard Industry Classification (ANZSIC), but instead cuts across ANZSIC. For example, the ANZSIC category ‘Accommodation and food services’ accounts for 35 per cent of the tourism industry, and the tourism industry accounts for 38 per cent of economic activity in ‘Accommodation and food services’.

The ABS produces an annual Tourism Satellite Account, in line with international standards for tourism statistics, which is used as a basis for definitions and analysis in this report, unless otherwise specified (ABS 2016).

B.2 The tourism sector and ANZSIC industry classifications

As shown in Table B.1 ANZSIC industry division ‘Accommodation and food services’ accounts for 35 per cent of the tourism industry, and the tourism industry accounts for 38 per cent of economic activity in ‘Accommodation and food services’. Other key ANZSIC industry divisions are Transport and storage (20 per cent of the tourism sector) and Retail trade (14 per cent). Arts and Recreation Services accounts for a relatively small 4 per cent of the tourism sector, but tourism activity accounts for 12 per cent of Arts and Recreation Services.

<table>
<thead>
<tr>
<th>ANZSIC industry division</th>
<th>Share of tourism sector</th>
<th>Contribution of tourism sector to ANZSIC industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>A — Agriculture, forestry, fishing and hunting</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>B — Mining</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>C — Manufacturing</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>D — Electricity, gas and water supply</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>E — Construction</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>F — Wholesale trade</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>
### B.3 Comparing Department of Employment (2016) and DAE (2015) employment projections


Table B.2 compares the two projections for the top 10 DAE tourism occupations. It is important to note that the two projections use different 2015 employment levels for each occupation—the DAE projections are just for tourism sector employment, which is a subset of total employment in each occupation. Apart from two occupations, DAE is forecasting greater percentage growth.

<table>
<thead>
<tr>
<th>Top 10 DAE tourism occupations</th>
<th>Department of Employment projections</th>
<th>Deloitte Access Economics projections</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Employment level 2015</td>
<td>Projected employment growth</td>
</tr>
<tr>
<td>Kitchenhands</td>
<td>127,076</td>
<td>8,415</td>
</tr>
<tr>
<td>Waiters</td>
<td>119,994</td>
<td>19,008</td>
</tr>
<tr>
<td>Bar Attendants and Baristas</td>
<td>93,671</td>
<td>11,719</td>
</tr>
<tr>
<td>Chefs</td>
<td>84,973</td>
<td>19,173</td>
</tr>
<tr>
<td>Café and Restaurant Managers</td>
<td>73,020</td>
<td>15,638</td>
</tr>
<tr>
<td>Cooks</td>
<td>34,290</td>
<td>2,421</td>
</tr>
<tr>
<td>Automobile Drivers</td>
<td>25,538</td>
<td>1,060</td>
</tr>
</tbody>
</table>
Department of Employment (2016) does not project overall tourism sector employment demand, as tourism is not an ANZSIC industry division Table B.3 presents Department of Employment (2016) projections for the six ANZSIC industry divisions most relevant to the tourism sector. Department of Employment (2016) is not projecting employment growth in any of the six industries higher than 13 per cent—DAE (2015) projects 22 per cent employment growth in the tourism industry.

### Table B.3 DEPARTMENT OF EMPLOYMENT ANZSIC LEVEL PROJECTIONS FOR TOURISM RELATED INDUSTRIES

<table>
<thead>
<tr>
<th>Top six ANZSIC industry divisions in the tourism sector</th>
<th>Department of Employment projections</th>
<th>ABS 2014-15</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Employment level 2015 (’000)</td>
<td>Projected employment growth (’000)</td>
</tr>
<tr>
<td>H — Accommodation, Food Services</td>
<td>824.1</td>
<td>98.8</td>
</tr>
<tr>
<td>I — Transport and storage</td>
<td>611.2</td>
<td>52.2</td>
</tr>
<tr>
<td>G — Retail trade</td>
<td>1267.4</td>
<td>106.0</td>
</tr>
<tr>
<td>P — Education and Training</td>
<td>938.0</td>
<td>121.7</td>
</tr>
<tr>
<td>R — Arts and Recreation Services</td>
<td>227.7</td>
<td>24.5</td>
</tr>
<tr>
<td>N — Administrative and Support Services</td>
<td>418.5</td>
<td>32.6</td>
</tr>
</tbody>
</table>

Note: Industry divisions sorted by share of tourism sector

SOURCE: DOE 2016, ABS 2015

### B.4 Tourism and hospitality VET qualifications

Private training providers were responsible for 39 per cent of enrolments in 2014. TAFEs (32 per cent) and schools (24 per cent) account for most other enrolments, with minimal numbers through universities, community education providers and enterprise providers. Figure B.1 makes clear, school delivery is focused at the Certificate I and II levels.
Most Tourism, Hospitality and Events training (82 per cent) takes place in New South Wales, Victoria and Queensland, reflecting their population size and the relatively high level of training per head of population (Figure B.2). The ACT has the highest level of training, controlling for population, while Western Australia and the Northern Territory have the lowest.

School provision is concentrated in New South Wales, Queensland and the ACT, while private providers are a larger share of the delivery market in Victoria (Figure B.2).
B.5 Government subsidies and student fees

The majority (90 per cent) of Tourism, Hospitality and Events training is government-subsidised (compared to 80 per cent for all training). Non-subsidised (called ‘fee for service’) Tourism, Hospitality and Events training accounts for a higher proportion of enrolments at the higher qualification levels. New South Wales and Western Australia have the highest proportion level of fee for service at around 18 per cent (Figure B.3).
State governments provide subsidies to a variety of VET courses, often on the basis of the labour market value of the course. Some states also set student fees, while others do not regulate fees and let training providers charge as they see fit.

Subsidies for Tourism, Hospitality and Events courses vary across states and qualifications. **Figure B.4** indicates a 2016 subsidy rate across the three largest states for the nine qualifications with the most number of enrolments (in 2014).

Subsidy rates often reflect the number of hours required for a qualification, and are generally higher for Certificate III apprenticeship qualifications (such as the Certificate III in Commercial Cookery) due to a higher cost of training delivery (in part due to higher infrastructure costs).

Subsidy rates are lowest in Victoria, and highest in New South Wales, with Queensland in the middle. In large part, this reflects the states’ overarching VET policies. In Victoria and Queensland student fees are uncapped, allowing training organisations to charge more and rely on subsidies less; whereas in New South Wales student fees are set by the government.

Further, the number of enrolments in Victoria are uncapped, leading to higher training volumes, and necessitating, for fiscal sustainability, lower subsidy rates.

**FIGURE B.4** SUBSIDY RATES FOR KEY TOURISM, HOSPITALITY AND EVENTS QUALIFICATIONS BY STATE, 2016

Note: Hours based on Victorian Department of Education website.

SOURCE: NEW SOUTH WALES, VICTORIAN AND QUEENSLAND DEPARTMENTS OF EDUCATION

For context, **Figure B.5** shows the spread of hourly subsidy rates in Victoria for 59 Tourism, Hospitality and Events qualifications and the 2,482 other qualifications subsidised. Generally, Tourism, Hospitality and Events qualifications receive a low level of subsidy, with almost half receiving under $4.00 an hour (compared to 14 per cent of other qualifications).

Data that allow this comparison for other states is not readily available.
B.6 Student outcomes from training

Government-subsidised Tourism, Hospitality and Events students report good training outcomes—87 per cent are employed after training and 80 per cent indicate they have fully or partially achieved their reason for undertaking training—similar to training outcomes to those of all VET students (Figure B.6).

Of those not employed prior to Tourism, Hospitality and Events training, 45 per cent were employed after training, indicating training is an important pathway to work; although only 29 per cent of graduates are employed in the same occupation as the training course. This is consistent with the broader VET sector and demonstrates the transferable skills gained through VET.

Tourism, Hospitality and Events training graduates employed full-time after training have an average salary of $47,100, 17 per cent lower than all other graduates ($57,000).
FIGURE B.6 STUDENT OUTCOMES SURVEY RESULTS FOR GOVERNMENT-FUNDED TOURISM, HOSPITALITY AND EVENTS AND ALL OTHER GRADUATES, 2013 AND 2014

Note: Student Outcomes Survey 2013 and 2014 combined.

SOURCE: NCVER 2016
1. Ms Bianca Tomanovic  
   Deputy Director, Policy  TTF: Tourism and Transport Forum

2. Mr Peter Shelley  
   Managing Director, ATEC: Australian Tourism Export Council

3. Mr Greg Binskin  
   Executive Officer, ARTN: Australian Regional Tourism Network

4. Mr John Hart  
   Chief Executive Officer, R&CA: Restaurant and Catering Industry Association

5. Mr Richard Monro  
   Chief Executive Officer  
   AAA: Australian Accommodation Association

6. Mr Steve Whan  
   Manager National Tourism Council  
   ACCI National: Australian Chamber of Commerce and Industry

7. Mr Matthew Hingerty  
   Chief Executive Officer and Managing Director  
   BECA: Business Events Council of Australia

8. Mrs Carol Giuseppi  
   Chief Executive Officer, Tourism Accommodation Association
D

INTERVIEW DISCUSSION GUIDE

Please note that these questions are a guide only to inform our discussions with you about what you perceive should be the key messages of an Outreach Campaign to encourage more Australians to pursue careers in hospitality and tourism.

1. What is your view of the overall reputation of the hospitality and tourism sectors for Australians seeking a rewarding (financial and psychological) career in these sectors?

2. What in your view are the major barriers to more young people wanting a career in Tourism and Hospitality?

3. What in your view are the major barriers for mature people wanting a career in hospitality and tourism?

4. Do you think these potential negatives should be addressed head-on in a public advocacy and communication Campaign to promote careers in hospitality and tourism?

5. Do you perceive there are specific labour markets or vocational education and training barriers to more Australians pursuing a career in hospitality and tourism? If so, what are these barriers, and how you think they can be addressed and overcome?

6. What do you see as the top three or four messages that should be the main focus of any Outreach Strategy to encourage more Australians to pursue a career in the hospitality and tourism sectors?

7. What are your recommendations as to what audiences/discrete stakeholders should be the primary targets in any public advocacy Outreach Campaign to encourage more Australians to want a career in hospitality and tourism (including governments and their agencies)?
ABOUT ACIL ALLEN CONSULTING

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