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About Workforce Insights

This Workforce Insight was developed prior to the outbreak of COVID-19 and the resultant economic and sector specific repercussions. The Food, Wine, Tourism and Hospitality ISC has already seen significant and will continue to monitor the impact of COVID-19 on skills needs in consultation with industry stakeholders.

A survey is being developed to inform the Food, Wine, Tourism and Hospitality ISC to respond to changing industry needs as a result of COVID-19. Workforce Insights will continue to evolve with further stakeholder consultation and as updated data and information becomes available.

At the beginning of 2019, the South Australian government established eight Industry Skills Councils (ISCs) to strengthen industry’s voice in skills and workforce development, and to ensure that funding for skills and training is directly aligned to industry priorities.

Workforce Insights brings together advice from ISCs and their networks, labour market and training data and industry research to explore the latest trends in skills and workforce development. In developing these reports, the Training and Skills Commission has adopted an industry centred approach, so you can be sure the insights have been endorsed by industry leaders.

Workforce Insights has been developed to inform government skills planning and to support employers and individuals to make informed workforce and skill development decisions. Workforce Insights will continue to evolve and be updated as additional research is undertaken and new information becomes available.

Thank you to all those who supported the development of these industry-led, sector-driven documents. Individually and collectively your contribution to the skilling and development of South Australia’s current and future workforce has been immense.

For further information, visit tasc.sa.gov.au/workforce-insights

Tourism

The tourism industry includes the travel of both domestic and international visitors in South Australia. Many sectors benefit from tourism, including accommodation and food services, transport, retail, rental and hiring services and arts and recreation services. The tourism industry directly employs around 40 500 people in South Australia for the year end June 2019.

Key findings

- Most of the tourism industry workforce is employed by small businesses; 8 000 are sole traders.
- Regional tourism is a major contributor; regional transport, including air travel, will need to keep pace with demand in order to deliver on growth targets.
- Skill deficiencies in the tourism workforce are varied, but a lack of longevity and seasonal employment are a major contributor to skill gaps.
- A major challenge for this industry is promoting it as a career of choice rather than a part-time or temporary job.

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Industry outlook

South Australia’s tourism industry, or ‘visitor economy’, encompasses the traditional categories of hotels, tours and airlines, as well as factors related to the overall spend of visitors in the state.

The tourism industry in South Australia is significant and has been growing rapidly for some time. Since the development of the South Australian Tourism Plan 2013, the visitor economy has grown 2.5 times faster than the overall economy. Over the 2013–2018 period, employment in the sector increased by 5 000 jobs—including about 2 000 in regional areas.

According to the South Australian Tourism Commission (SATC), there were more than 36 000 direct jobs in the Visitor Economy in South Australia in 2019, of which 20 000 were in Adelaide.

The impact of the Coronavirus has been particularly severe for the tourism industry, with the cessation of International and Interstate travel. It is also likely to be one of the sectors that will take the longest to recover, with travel restrictions expected to persist for some time.

![Graph: Direct Jobs in the Visitor Economy]

Source: State Tourism Satellite Account, Tourism Research Australia

Most of the visitor economy workforce is employed within small business. In 2019, there were 17 600 South Australian tourism businesses for which all or part of the workforce was dedicated to serving the visitor economy. Almost 8 000 of these businesses are sole proprietors or partnerships,

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2 South Australian Tourism Commission, *The South Australian Visitor Economy Sector Plan 2030*
3 Ibid.
4 Ibid.
such as small-scale tour guides, accommodation providers, retailers and taxis. Among employing businesses, most have fewer than 20 staff.

**Skill shortages**

Skill shortages includes occupations or skills that have been identified by Industry Skills Councils pre COVID-19, as currently experiencing a skills shortage.

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Region</th>
<th>Industry</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar Attendant</td>
<td>South Australia</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Barista</td>
<td>South Australia</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Cellar Door Sales</td>
<td>Regional</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Chef</td>
<td>South Australia</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Cook</td>
<td>South Australia</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Kitchen Hand</td>
<td>South Australia</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Waiter</td>
<td>South Australia</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
</tbody>
</table>

**Skill deficiencies**

Among tourism business operators, 75 per cent report skill gaps among their workers. The most commonly reported deficiency is a misalignment of employee capabilities with the skills required for that role.⁵

In South Australia the reasons reported for skill deficiencies include:

- a misalignment between capability and role requirements
- lack of experience in the sector
- lack of opportunity to gain experience
- access to suitable, quality training
- a lack of applicants due to business location.

In response to skill deficiencies, South Australian tourism businesses were slightly less likely than businesses in other industries to respond by establishing more flexible arrangements or formalised training. More than 60 per cent of businesses reported exploring mature age workers as one of several available sources of labour.

**Critical occupations**

Critical occupations include occupations or skills that have been identified by Industry Skills Councils, pre COVID-19 and include occupations that are deemed critical to achieving industry growth potential.

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Industry</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cellar Door Sales</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Cellar Hand</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Chef</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Concierge Services</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
</tbody>
</table>

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### Future skills shortages

Future skill shortages include occupations or skills that have been identified by ISCs, pre COVID-19, as being at risk of experiencing a skills shortage over the next five years.

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Industry</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barista</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Café and Restaurant Managers</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Café Worker</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Chef</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Cook</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Event Manager</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Kitchenhand</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Tour Operator</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
<tr>
<td>Waiter</td>
<td>Tourism</td>
<td>Occupation</td>
</tr>
</tbody>
</table>

### ISC member comments (pre COVID-19)

- Community expectations that young people should enter higher education has made VET seem a second choice for some families. Consequently, we see inadequate interest in apprenticeships or for a career in the industry.
- Ability to provide adequate supervision is a barrier to employing a trainee or apprentice. Many operators are not qualified themselves (e.g. publicans) and this is particularly the case in regional areas.
- The contract of training is sometimes seen as a barrier (perception of being just more red tape)—along with supervision requirements.
- Relevance of the Training Package is sometimes a concern—or even the need for a full qualification.

### Plans and major projects

<table>
<thead>
<tr>
<th>Project</th>
<th>Status</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Traineeships—Pilot Project</td>
<td>Underway – Paused due to COVID-19</td>
<td>Tourism</td>
</tr>
<tr>
<td>Tourism Industry Training for SME’s*</td>
<td>In progress</td>
<td>Tourism</td>
</tr>
<tr>
<td>Upskilling and Retaining SA People within SA Tourism and Hospitality*</td>
<td>In progress</td>
<td>Tourism</td>
</tr>
</tbody>
</table>

*Skilling South Australia project

- There are significant plans for tourism and other developments in South Australia’s regions and major centres.
• $2 billion of hotel development in the pipeline, plus hospitality projects, including:
  o GPO Exchange Tower project
  o Samuel Way Building and Adelaide Central Market developments
  o Adelaide Casino expansion
  o Adelaide Oval
  o new hotel development in McLaren Vale.

Each of these major infrastructure projects will have a flow-on impact on South Australia’s hospitality and tourism workforce.

ISC priorities (agreed pre COVID-19)

<table>
<thead>
<tr>
<th>ISC priority</th>
<th>Status</th>
<th>Responsibility</th>
<th>Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools to see Hospitality, Tourism, Food and Wine as viable career pathways and skills development opportunities</td>
<td>In progress</td>
<td>Department for Education</td>
<td>Tourism</td>
</tr>
<tr>
<td>Better IT and Digital skills/Business Capability</td>
<td>In progress</td>
<td>Department for Education, TAFE SA, RTOs</td>
<td>Tourism</td>
</tr>
<tr>
<td>Attract and train more Chefs, Cooks, Restaurant Managers</td>
<td>Ongoing</td>
<td>Department for Education, Industry</td>
<td>Tourism</td>
</tr>
<tr>
<td>Better advice to employers on process to sign up apprentices and trainees</td>
<td>In progress</td>
<td>DIS, Industry Associations, Apprenticeship Brokers</td>
<td>Tourism</td>
</tr>
<tr>
<td>SME Micro Credentials/Capability (Units)</td>
<td>Proposed</td>
<td>TASC, DPC, TICSA</td>
<td>Tourism</td>
</tr>
<tr>
<td>Attractions and Tour Operator Training</td>
<td>Proposed</td>
<td>TAFE SA</td>
<td>Tourism</td>
</tr>
<tr>
<td>Consider projects and micro-credentials to increase social media marketing skills, particularly as they relate to key overseas markets.</td>
<td>Proposed</td>
<td>DIS/ISC, Industry Associations, RTOs</td>
<td>Tourism</td>
</tr>
</tbody>
</table>

**Schools to see Hospitality, Tourism, Food and Wine as viable career paths**
Work with school guidance counsellors, VET Coordinators and schools (with students, teachers and parents) to affirm the career paths, skills development opportunities and positive job outcomes for workers in these industries. Focus on the entrepreneurship that is evident in the sector and the pathways to self-employment.

**Better IT and Digital Skills**
The demand for digital literacy and IT capability continues to grow across all industry sectors. These foundation skills must be fostered at each level of education and training to ensure career progression.

**Attract and train more Chefs, Cooks, Restaurant Managers**
As the industry continues to grow and morph into non-traditional sectors the demand for cooks, chefs and restaurant managers continues to be unmet. Aside from the growing demand from cafes,
restaurants and hotels, the skills are equally in demand from wineries, function centres, events, hospitals and aged care, caterers specifically for home deliveries and food manufacturing and production sectors.

**Better advice to employers on process to sign up apprentices and trainees**
A lack of knowledge and understanding by industry on the processes involved in employing apprentices and trainees inhibits uptake. Better information is required to support industry to engage in the process and understand the benefits, time frame and obligations.

**SME Micro Credential Development/Capability (Units)**
Ninety-five per cent of tourism businesses are small, micro or owner operators and are delivering export services to international visitors. Their capacity to deliver world standard services and products requires co-investment from government. Capability areas for development include digital, customer service and storytelling/tour guiding.

**Attractions and Tour Operators**
There is a gap in the certified training regimes available for tourism businesses, for attractions and tour operators. This has been identified in a Skilling SA project that is delivering a Certificate III in Tourism with non-accredited training in town ambassador, guiding/storytelling, function and events, digital marketing and packaging & partnerships.

**Improve social media skills**
Given the challenges involved in finding employees with marketing skills in regional areas and the importance of understanding the different platforms used in different markets, consider project and micro-credentials to increase the social media skills of SMEs, particularly as they relate to key overseas markets.