

Notes

The information contained in this report is understood to be current and correct at the time of writing.

Much of the detail has been gathered from industry representatives using semi-structured interview techniques covering a range of pertinent topics and therefore no specific attribution to any particular individual or group has been made. The views and recommendations contained in this report aim solely to communicate advice to Government on the topic at hand.

Statistical information has been used where appropriate but where current information has not been available it has been omitted.

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TAFE Tasmania
Tahune AirWalk
Tasmanian Convention Bureau
Tourism Council Tasmania
TT Line

Scope

This training demand profile aims to outline the training needs of the Tasmanian Tourism and Hospitality industry (insofar as it is defined as an industry) and limits itself to the following broad sectors:

- Hospitality
- Commercial Cookery
- Meetings and Events
- Guiding
- Eco Tourism
- Caravans and Holiday Parks
- Retail Travel

The National Hospitality Training Package, the National Tourism Training Package and the Caravan Industry Training Package cover these industry sectors.

PART ONE

Industry background and directions

Tasmanian Tourism - A rapidly changing industry

The tourism industry in Tasmania is built on advantages gained from existing within a unique island state that showcases dramatic and pristine environments and reputation for developing a distinctive presence in global terms.

Tourism in Tasmania is currently going against the national trend of a 4% decrease of inbound visitors to Australia. Whilst the impact of SARS and terrorism may have short term negative effects elsewhere, Tasmania has dramatically improved its accessibility issues through the introduction of Spirit 1 and Spirit 2 in September 2002 and is currently experiencing unprecedented growth in visitation.

At the time of writing negotiations appear well underway for the introduction of a third ferry. A superfast monohull is proposed to commence travel between Devonport and Sydney in December 2003, bringing with it the potential to access the relatively untapped touring market from the north eastern seaboard of Tasmania.

Total travel expenditure during 1998 amounted to \$900 million and generated employment for an estimated 18,300 people – 10.3% of the Tasmanian workforce – representing a significant contribution to the economy of the state.

The Tasmanian Visitor Survey (TVS) figures illustrate an increase of 17.6% in visitors for the year ending March 2003, 674,600 as against 526,600 in the same period for March 2002. In addition to this increase, their average stay has increased from 9 to 10 nights.

Tourism 21 'The Conversion Challenge' is the strategic plan for the Tourism Industry 2001/04. This plan forms the framework around which the goal of developing Tasmania's reputation as a premier holiday destination through cohesion and holistic delivery of 'experiences' is built.

Tourism 21 is the practical means for operators, Tourism Council Tasmania, Tourism Tasmania and other stakeholders to design and provide experiences for visitors via the development of tourism clusters, hubs and touring routes.

The focus of this framework recognises and builds on the promotion of Tasmania as a destination, to one of maximising the potential of Tasmanian operators by grouping the value of attractions, activities and services to act as a drawcard.

Tourism 21 also focuses on the importance of a smooth transition from service to service, to ensure the experience is maintained to the highest standard.

It is encouraging to note that Tasmania Together fortifies the strategic direction in which Tourism 21 is steering the industry.

These goals cannot be met effectively and efficiently without a broad based and concerted approach to ensuring development of competencies of all tourism and hospitality personnel across the state. A focused, tailored approach to training and development is required if the Tasmanian tourism and hospitality industry is to recognise, maintain and improve on standards to meet and exceed the needs of our visitors.

Industry accreditation is a significant initiative with approximately 600 businesses receiving accreditation in the last 3 years through the Tourism Council Tasmania and is a fillip to those businesses serious about meeting the challenges of increased visitation and greater sophistication of visitors.

Part Two

Skill Shortages - Current

2.1 Commercial Cookery

The National Skills Shortage List – Australia 2003 indicates a national shortage in the following food trades occupations:

- Chef
- Cook
- Pastrycook

(<http://workplace.gov.au>, 2003)

In Tasmania, the shortage for 'head chefs' is state-wide and is deemed to be more pressing in regional areas where difficulties exist in recruiting and retaining suitably qualified professional cooks.

The skill shortage is compounded by the 'leakage' of trained and experienced cooks out of the industry.

In 2002 the estimated attrition rate of chefs nationally was 15.2% of the 48,900 employed in this occupation, representing the loss of 7433 professionals. Over the same period 27.3% (10,647) of the nations 39,000 cooks left their profession and of the 28,400 bakers and pastrycooks nationwide, 9.4% changed occupations.

(<http://jobsearch.gov.au>, 2003)

Clearly, the attrition rate is a prime contributor to the current national and state skills shortage and is perhaps indicative of issues within the profession that exist outside of the training area

2.2 Managers

Although the National Skill Shortage List - Australia 2003 does not indicate a national shortage of hospitality/tourism managers, research undertaken for this TDP suggests that managerial skills in the following areas should be improved:

- General business management (accounting, stock control, budgeting)
- Leadership
- Human resource management (EEO, OHS, performance management)

These skills are generally developed at AQTF levels 5 and 6.

2.3 General - Operational Hospitality (Certificate II-III)

Research undertaken for this TDP suggests that although there is no shortage of willing candidates, food and beverage attendants with sufficient skill levels are in short supply. Those with a genuine career orientation in this occupation are very rare.

The national attrition rate for food and beverage occupations is very high at 30% for waiters and 29.2% bar attendants indicating a largely transient workforce.

Candidates with gaming licences and TAB and Keno skills are also in short supply.

2.4 Tour Guides

Given the increasing popularity of eco tourism in the state and the developing demand for such activities (eg outdoor and adventure activities, developments such as the Tahune AirWalk etc.) tour guides with interpretive skills are in demand. The demand shift to a more entertaining and contextual commentary during guided activities is fuelling the need for increased training in interpretation and 'story telling' in addition to the factual and scientific understanding that guides are required to communicate to visitors.

2.5 Customer Service and related Interpersonal Skills

Unanimously, the responses to the survey questions suggested that a general lack of customer service skills, interpersonal skills and 'service culture' was present in the hospitality/tourism labour market. Many respondents indicated that although candidates may have possessed the practical skills and formal qualifications required to undertake the required tasks the ability to provide inclusive customer service to an acceptable level was absent. So too, prerequisite personal skills such as presentation, hygiene and motivation are deficient and emerging as a point of concern throughout the industry.

A general deficiency is reported to exist in the general understanding of the demands of the hospitality and tourism workplace. Operators reported that attrition from hospitality and tourism occupations (especially at the functional or operational levels – Cert II-III) is often due to poor 'fit'. Many suggested that even though an individual had completed training, they may have still been unprepared for the workplace. This has far reaching implications in regard to the delivery of training and responsibility of providers to illustrate the industry and its demands as close to 'reality' as possible.

Skill Shortages – Future

As stated in the previous section, the recent level of growth in the Tasmanian tourism and hospitality industry has been hitherto unseen. Improved access to the state, the shift in market demands and the emerging sophistication of the traveller necessitate that skills shortages be addressed forthwith. Of particular concern is the ability to meet customer service demands in both metropolitan and regional areas.

The industry can not ignore the challenges that increased visitation is delivering and this will in turn place demands on the public training system. Reportedly, practical skills are important and form the basis of the individual's ability to contribute successfully to organisational goals. In the tourism and hospitality context, however, customer service and interpersonal skills are imperative and should be prioritised in the delivery of training and assessed with rigor to assure required 'soft skills' outcomes.

PART THREE

Industry demand for training from the public training system

Size of the Industry

Given the difficulty in determining the separation between much of the tourism and hospitality workforce the estimation of the size of the industry is indicated as a whole.

It is estimated that approximately 18,300 people are employed in the tourism and hospitality sector. The overwhelming majority of businesses in this sector are small (less than twenty employees) and very small (less than five employees). Typically owner operated with supporting staff this sector faces challenges associated with the cost (in monetary terms and in time) of training.

3.1 Hospitality

3.1.1 Characteristics of the existing workforce

The hospitality component of the broader industry is comprised of many and varied occupations and the ill defined nature of the industry itself makes absolute identification of hospitality/tourism specific occupations difficult. However, the DEWR Job Outlook document (June 2002) classifies relevant occupations under a broad category of Food, Hospitality and Tourism and includes:

- Baking and pastrycooking
- Bar attendants
- Chefs (and wine makers)
- Cooks
- Hotel and gaming workers (inc. rooms division, security etc)
- Hotel, motel, club and restaurant managers
- Kitchenhands
- Waiters

3.1.2 Employment Characteristics

The following table illustrates the major characteristics of the hospitality workforce for which statistics are available.

Job^^	Estimated numbers # (Tasmania)	Gender Mix	Attrition %	Full time employment *	Main Age group
Club Managers	49	31.2% F 68.8% M	15%	91.2% FT 8.8% PT	35-44 years
Hotel Motel Managers	376	38.5% F 61.5% M	18.5%	93.6% FT 6.4% PT	35-44 years
Restaurant and Catering Managers	826	53% F 47% M	8.9%	75.4% FT 24.6% PT	35-44 years
Gaming Workers	207**	46.4% F 53.6% M	7.6%	81.2% FT	25-34 years
Bar Attendants	1026	51.5% F 48.5% M	29.2%	38.1% FT 61.9% PT	20-24 years
Waiters	1759	76% F 24% M	30%	23.7% FT 76.3% PT (47.2% work less than 16 hours per week)	15 – 19 years

Notes: Figures current as at December 2002

^^As defined by DEWR Job Outlook

#As suggested by Tasmanian proportion of national figures

*Part time labour includes casual labour figures

**Workers employed in hotel gaming venues may be represented as bar attendants or waiters

(<http://www.jobsearch.gov.au>, June 2003)

3.1.3 Normal Drivers of Demand

Research suggests that the current main driver of demand is the unprecedented growth in the hospitality industry in general brought about by increased visitation to the state. As previously mentioned, the increase in visitor numbers and related concerns regarding the ability to meet visitor expectations with present skill standards is a major driver of demand for training. Also, increased visitation is fuelling employment growth in the sector, thus encouraging increased basic skills training.

However, as described in the table, attrition from operational hospitality functions is high, illustrating the transitory nature of the industry. This in turn creates opportunities to train replacement personnel.

Licensing requirements such as Responsible Service of Gaming and Responsible Service of Alcohol have maintained demand in those units.

3.1.4 Changes occurring in the demand for training

Recent criticism of service standards in Tasmania has prompted a strong focus on customer service and 'soft skills'. Research for this report found that all sectors are concerned with improving the ability of hospitality personnel in these areas. Therefore, a shift away from the purely functional skills to the interpersonal ones is justified.

3.1.5 Changes required to the nature of training

Given the regional growth in the hospitality sector (Cradle Mountain region, North West Coast, Freycinet and West Coast in particular) training will necessarily need to be delivered in those areas. As seen in the recent past, partnerships such as the Drysdale-Strahan Village programmes enabled a combination of on and off the job delivery in situ. Employers in these areas are demanding that more training delivery occur 'on their doorstep'. Tyranny of distance, seasonal demand and costs of sending staff to training prohibits institutional delivery in many cases.

However, some employers in metropolitan areas are concerned with the limitations of their own businesses to provide adequate training outcomes on the job and find it much more suitable to send their staff away to training. This suggests that recognition of the individual needs of the business, capacity and desire to encourage on the job training and required outcomes be assessed by the RTO (public or private) when developing training plans.

'Clustering' of units should also be undertaken. That is, where two or more units with complimentary outcomes are delivered or assessed in a holistic fashion. This may reduce the time taken to deliver training or perform

assessments without reducing the rigor or compromising the required outcome. So too, relevance to the 'real world' nature of the task and related tasks is increased.

The National Training Package allows for considerable flexibility and customisation of training in order to meet the needs of the establishment and industry.

3.1.6 Target Market for Training

As is evidenced by the preceding table the majority of hospitality workers are in the 15-25 age group.

Traditionally, the market for training has been:

- School leavers
- Students (casual workers)
- Job seekers/unemployed/'second job' seekers
- Existing employees (New apprenticeships)

Given the recent and continued growth in regional areas and the move away from traditional employment such as primary industry in the same areas, older job changers may become more prevalent targets for skills training. So too, research into population change in Tasmania (Jackson, 2002*) indicates that candidates in the traditional age bracket will be fewer and attractiveness of other industries may shift the focus to older workers across the board. Training providers must therefore look at ways of appealing to those older workers.

3.1.7 Numbers of people that need to be trained, by occupation, qualification and region.

It is unlikely that a numerical representation would be accurate here. The issue of skills shortages generally lies not with the numbers of people being trained but the mix of people, the qualifications gained and the outcomes as perceived by the industry.

*(Jackson, N. 2002. When the population clock stops ticking: An indicative study of population aging in Tasmania. *Australian Journal of Regional Studies*. 8:1 pp3-19)

Anecdotally, a large proportion of those publicly trained in Certificate II and III are looking for part time/casual work to alleviate unemployment, are 'testing' their suitability for a career in hospitality or looking to facilitate a change in employment. Responses from those questioned suggest that many of these people are functionally competent but lack depth of understanding of the demands of the industry. This contributes to the transitory nature of the industry - looking for more suitable work or failing to develop the interpersonal skills required to contribute to the holistic delivery of the service experience is a precursor to attrition.

So too, those who gain more advanced qualifications such as the Certificate IV and Advanced Diploma may be disgruntled with the prospect of finding only operational work on completion of their study and move interstate to seek better opportunities or move into another occupation. Respondents suggested that more emphasis be placed on developing functional and interpersonal skills (through job placement) and developing a realistic expectation of career progression in the industry in general and in Tasmania where managerial opportunities are not readily available to new graduates.

However, existing employees and management staff who have the background experience are perceived to have a need of general business skills and customer service *management* proficiency. Again, numerical estimations provide little utility here.

3.1.8 Recommended response by the training system to demand/supply imbalances.

- Fortify the rigor by which 'soft skills' are delivered and assessed.
- Fortify the rigor by which customer service skills are delivered and assessed.
- Move to a 'cluster' arrangement to ensure relevance of training to workplace demands and promote transference into the workplace.
- Encourage a longer term commitment to the industry by offering realistic induction to the demands of what is expected. It has been suggested that more work experience/ work placement be available to those in training.
- Encourage a mentoring approach to the delivery of management units.
- Review funding arrangements to encourage greater uptake of 'life long learning' concepts to management. As indicated the numbers of self employed people in management positions precludes their access to mainstream traineeship funding.
- Offer short, sharp focused 'bundles' of units in a flexible manner. The combination of portfolio assessment, on line delivery and face to face delivery may present employers (especially those in regional areas) with options for their staff or themselves.
- Determine whether the qualification as an end in itself is required (eg for new entrants into the industry) or whether the individual is looking for development opportunity only (management and existing employees). This enables the RTO to better customise the training content and delivery mode to the needs of the learner and make better use of the training package.

3.1.9 Information on training demand being met outside the Tasmanian public system.

The value of building partnerships with industry has been recognised and continues. Examples of training partnerships include the Hotel Grand Chancellor – Drysdale Hotel School and the Wrest Point/Federal Hotels projects.

Other major providers of training and assessment include but are not limited to:

- Island Group Training
- Work and Training
- Skillshare organisations
- NGT
- TCCI College of Management

3.1.10 Additional industry advice not directly related to industry demand for training:

Respondents variously reported the following underpinning skills are in need of attention across the industry.

- Realistic expectations of what the industry can support in terms of career progression and entry level positions.
- Genuine desire to work in a dynamic and demanding industry.
- Interpersonal skills.
- “Culture” of service. That is, the recognition of the value and importance of delivering customer service to customer expectation and beyond.
- Literacy and numeracy skills to a functional level.

3.2 Commercial Cookery

3.2.1 Characteristics of the existing workforce

The following table illustrates the major characteristics of the commercial cookery workforce for which statistics are available.

Job^^	Estimated Numbers # (Tasmania)	Gender Mix	Attrition %	Full time employment*	Main Age group
Chefs	860	22.6% F 77.4% M	15.2%	85.8% FT 14.2% PT (49% work more than 41 hours per week)	25-34 years
Cooks	528	56.2% F 43.8% M	27.3%	66.4% FT 33.6% PT	45-54 years
Kitchenhands	1208	59.3% F 40.7% M	38.2%	26.2% FT 73.8% PT	15-19 years
Bakers and Pastrycooks	55	16.5% F 83.5% M	9.4%	90.3% FT 9.7% PT	25-34 years
Pastrycooking and Baking assistants	26	39.5% F 60.5% M	28.3%	44.4% FT 55.6% PT	15-19 years

Notes: Figures current as at December 2002

^^As defined by DEWR Job Outlook

#As suggested by Tasmanian proportion of national figures

*Part time labour includes casual labour figures

(<http://www.jobsearch.gov.au>, June 2003)

3.2.2 Key drivers of training demand

As suggested previously the growth in the industry in general is developing demand for training in the area of commercial cookery and those seeking employment in this occupation are the major drivers of demand.

However, as is evidenced by the above table, the attrition rate for commercial cooks/chefs and kitchen hands is high. Contributing factors include relatively low pay, demanding working conditions and stress.

3.2.3 *Changes in the demand for training*

Research suggests that there is almost a perpetual shortage of qualified cooks/chefs. It has been suggested that those with business skills or those that would be ideally suited to an executive chef/head chef position are in short supply. This may be attributed to the current training demand to Certificate III level. Few individuals continue on to higher qualification levels or managerial training immediately. Also, it is recognised that the exit point at Certificate II may allow an employment outcome at a lower level and therefore continued skill development is halted.

It was also suggested during research that the move away from the traditional 'apprenticeship' arrangements has allowed flexibility and a competency based approach over a time based approach, but has impacted on the development of skills in a workplace environment. So too, the nominally shorter timeframe for attainment of a qualification may be attracting those who may not have a commitment to a career in the industry, thus contributing to the evanescent nature of the occupation.

3.2.4 *Changes required to the nature of training*

A Recipe for Change – the future of commercial cookery in Australia (DETYA, 2001) recognises that the occupation is a demanding one that places individuals under pressure to perform in difficult conditions at unsociable hours. As suggested previously, the expectations of new entrants need to be realistic and the training environment perhaps is the place to begin to deliver the realism of the occupation through work placements or prerequisite experience in some form. Structural changes to the profession (ie. better conditions, pay, recognition etc) sit outside the scope of this report, but should be recognised if training is to keep pace with the demands of the industry due to attrition. That is, the answer is not simply to train more cooks, but to keep and develop those already in the industry.

In terms of the nature of training, it has been suggested that more scope be introduced to the 'hands on' experience of the individual. For example, cross training in differing establishments or exposing those in training to a broader practical experience. It is acknowledged however, that institutional delivery has impediments in this regard (eg finding placements in industry).

As already suggested the regional areas are disadvantaged in that training is required to come to the property as the costs of sending staff to campus based training is prohibitive for many establishments. Clustering units, on the job assessments and mentoring for the workplace based 'trainers' should be considered as an alternative to the traditional form of campus based study. Many regional properties already use this form of delivery/assessment. However, rigor in assessment should not be compromised for the sake of flexibility and cost saving.

3.2.5 Target market for training

School leavers and new entrants to the profession are the main target markets, but as already suggested, non-traditional markets should be considered due to structural changes in Tasmania's population, the growth in regional areas and need for retraining due to shifts in employment opportunities.

Also, a concerted effort should be made to continue the training/development of existing cooks in order to address the managerial skills shortage.

3.2.6 Numbers of people to be trained

Nationally, research suggests that 3000 additional cooks/chefs are required every year to 2006 in order to address growth in the industry and deflect the effect of attrition (DETYA, 2001). However, the comments made at 3.1.8 stand here also. That is, encourage long term commitment to the occupation by way of realistic recruitment and delivery.

Encouraging the continual development to Certificate IV and beyond will address managerial shortages from the existing workforce.

3.2.7 Recommendations for the appropriate response by the training system to demand/supply imbalances.

- Move to a 'cluster' arrangement to ensure relevance of training to workplace demands and promote transference into the workplace.
- Encourage a longer term commitment to the industry by offering realistic inductions to the demands of what is expected. It has been

suggested that more work experience/ work placement be available to those in training.

- Encourage a mentoring approach to the delivery of general management units.
- Review funding arrangements to encourage greater uptake of 'life long learning' concepts to career chefs/cooks beyond Certificate III.
- Offer short, sharp focused 'bundles' of units in a flexible manner. The combination of portfolio assessment, on line delivery and face to face delivery may present employers (especially those in regional areas) with options for their staff or themselves.
- Determine whether the qualification as an end in itself is required (eg for new entrants into the industry) or whether the individual is looking for development opportunity only (management and existing employees). This enables the RTO to better customise the training content and delivery mode to the needs of the learner and make better use of the training package.
- Encourage a move back to traditional forms of training (eg the 'old' apprentice system) where appropriate to facilitate career progression and on the job experience with the advantage of periodic institutional training.

3.3 Meetings and Events

The TVS (March 2003) indicates that the numbers of visitors travelling to Tasmania for the purpose of meetings and events/conferences/conventions has grown by 21.1% over the previous year. Anecdotal evidence suggests that overall the market has grown by 62% in the two years to date.

3.3.1 Characteristics of the existing workforce

The numbers of people working in the meetings and events sector (Meetings, Incentives, Conferences, Exhibitions/Events – MICE) is indeterminate. The very nature of the business is highly mobile and utilises resources outside of the stable nucleus of professional conference organisations and venues to meet the demands of the individual client (eg hospitality venues, independent tourism operations etc). Indeed, volunteer labour is used on a regular basis where events call for increased personnel.

3.3.2 Normal drivers of training demand

Growth in this sector and visitor numbers in this category is driving demand for training in this area. Anecdotal evidence indicates that numbers of people seeking training in this pathway are increasing as the sector becomes more attractive to prospective entrants. Also pathways through Certificate III with meetings and events units as a specialist 'major' can continue through to diploma and advanced diploma levels in general tourism pathways.

3.3.3 Changes occurring in the demand for training

As mentioned above the pathways within the Tourism Training Package allow for specialisation in this area as well as the ability to incorporate it into a general tourism qualification. This is indicative of the professionalisation of the function of meetings, events and convention management. No longer is this occupation seen as an adjunct to general travel or hospitality operations; it is seen as a specialist occupation.

So too, the demand for non traditional forms of delivery of the meetings and events service is requiring practitioners to be more adept at meeting the changing needs of the client. As clients demand more distinctive and creative events often outside of the traditional conference venues (eg breakfast meetings in the forest, cocktail parties on the Mountain etc.) more expertise is demanded of the practitioner. For example, project management skills are required to put large events and affiliated ancillary services together in a package that meets the needs of the client. General business management skills are also required to ensure the profitability of the services delivered.

3.3.4 Changes required to the nature of training

It is suggested that non-traditional forms of training be available in the form of workplace assessment, on line delivery and mentoring of those already working but looking for skill development in the area. All of these forms of delivery can be supported by the National Training Package.

3.3.5 The target market for training

Research indicates that those looking to enter the occupation such as school leavers and job changers are the prime market for training. However, as the demand for services in this area is expected to continue to increase, it is reasonable to hypothesise that existing workers in the travel and/or hospitality industry will look to developing specialist skills in the area and seek training.

3.3.6 Numbers of people to be trained

Currently the numbers of people being trained in this pathway are sufficient to meet the needs of the industry (approx. 24 per year). As already indicated the popularity of the units specialising in this area is increasing and numbers of people seeking training in this area as an adjunct to general travel and tourism qualifications is expected to meet demands into the foreseeable future.

3.3.7 *Recommendations for the appropriate response by the training system to demand/ supply imbalances.*

As stated there is no evidence to suggest that there is a demand/supply imbalance in Tasmania at this time. Given that the pathways and qualifications allow for specialisation or inclusion of meetings and events units in a general qualification, it is suggested that the status quo be maintained notwithstanding the following:

- Offer short, sharp focused 'bundles' of units in a flexible manner. The combination of portfolio assessment, on line delivery and face to face delivery may present employers (especially those in regional areas) with options for their staff or themselves.
- Determine whether the qualification as an end in itself is required (eg for new entrants into the industry) or whether the individual is looking for development opportunity only (management and existing employees). This enables the RTO to better customise the training content and delivery mode to the needs of the learner and make better use of the training package.

3.3.8 *Information on training demand being met outside the Tasmanian public system.*

As a specialist area, Drysdale TAFE, Tasmania, mainly delivers the meeting and events units. Independent RTOs offering fee for service training in this area are insignificant. However, correspondence courses are available but demand and uptake in Tasmania is unknown.

3.4 Guiding

3.4.1 Characteristics of the existing workforce

Unfortunately, the Jobsearch website (<http://jobsearch.gov.au>, 2002) does not give a specific breakdown between travel agents and tour guides. The figures given include the following statistical information:

Job^^	Estimated numbers # (Tasmania)	Gender Mix	Attrition %	Full time employment *	Main Age group
Travel Agents & Tour Guides	568	78.3% F 21.7% M	11.2%	76% FT 24% PT	25-34 years

Notes: Figures current as at December 2002

^^As defined by DEWR Job Outlook

#As suggested by Tasmanian proportion of national figures

*Part time labour includes casual labour figures

Current employment for guides exists in the following broad areas:

- Built and historical
- Natural heritage (eg. geological, ecological)
- Specialist tours (eg. fishing, walking, nature based etc)
- Adventure tours (eg. white water rafting, climbing etc)
- Coach and boat tours

The demand for guides is seasonal but as the shoulder season continue to contract (ie. the soft season is decreasing) the periods offering opportunity for employment is extending.

3.4.2 Normal drivers of training demand in this industry group

Research undertaken for this TDP indicates that drivers of training demand in this segment of the industry stem from the increasing professionalism of the occupation, increased visitation and demand for guided activities. It is suggested that the increased focus on public liability has prompted operators to increase the skills and responsibilities of those accountable for guiding activities.

Also, sophistication of visitors is escalating, that is, visitors experiencing guided activities are looking for more than just factual commentary. Context and the ability to 'tell stories' and to entertain are becoming increasingly important to the overall delivery of holistic experiences, not just a walk in the forest for example. Therefore, reliance on basic outdoor and first aid skills is no longer acceptable as a total inventory of competency in this occupation.

It is significant to note that the 2003-2004 Budget papers indicate that \$10 million has been allocated over the next two years for infrastructure in national parks and for heritage assets illustrating the contribution of these state resources to the tourism industry. This bodes well for an increase in demand for training in this area.

3.4.3 Changes occurring in demand for training

In response to the above conditions training in this pathway has become more specific and specialised and emphasis has been placed on interpretation skills as well as general outdoor/recreational guiding competencies.

In terms of demand the increase in the eco tourism market and increased access to 'wilderness attractions' has given rise to the demand for interpretation skills for those not necessarily involved in guiding as a specific occupation. That is, multi-skilling across occupations (eg. food and beverage, outdoor recreation, coach driving) has necessitated the incorporation of guiding elements in order to meet the demands of visitors for a well-rounded experience.

3.4.4 Changes required to the nature of training

Given the increase in demand for interpretation skills as well as outdoor recreational skills the TAFE system has responded by offering Certificate III level courses designed to meet this demand. Developing skills in natural and cultural heritage as well as eco/adventure tourism off and on campus it is suggested that the status quo in regard to the available qualifications and delivery methods be maintained.

However, given the large demand for such skills in regional growth areas (eg. Cradle Mountain, West Coast, Freycinet) it is anticipated that off campus flexible delivery will become a convenient and effective means of delivery for those unable to attend on campus study.

It is also suggested that pathways into general business management units offered in the package be available for future development opportunities to be met.

3.4.5 The target market for training

Research for this TDP indicates that the target market for training includes:

- Existing employees (those employed in some form of outdoor recreation already and/or existing employees of establishments looking to improve interpretive skills but not necessarily involved in guiding per se),
- Mature school leavers (those with some travel/life experience)
- Those wishing to change jobs into the guiding sector (perhaps those who have experienced job loss from traditional industries in regional areas with a knowledge of their own environment).

3.4.6 Numbers of people that need to be trained.

Indications of specific numbers are difficult to identify due to the seasonality and transient nature of the business and demand from existing employees. However, research suggests that the current numbers (approx. 60 this year out of the TAFE system) are sufficient to meet demand at this time. It is expected that demand from existing employees will increase over time and will add to the number of people requiring training, probably on a more flexible basis.

3.4.7 Recommendations for the appropriate response by the training system to demand/supply imbalances.

There is no evidence to suggest that there is a demand/supply imbalance in guiding in Tasmania at this time. Given that the pathways and qualifications

allow for specialisation in this set of competencies it is suggested that the status quo be maintained, notwithstanding the following:

- Offer short, sharp focused 'bundles' of units in a flexible manner. The combination of portfolio assessment, on line delivery and face to face delivery may present employers (especially those in regional areas) with options for their staff or themselves.
- Determine whether the qualification as an end in itself is required (eg for new entrants into the industry) or whether the individual is looking for development opportunity only (management and existing employees). This enables the RTO to better customise the training content and delivery mode to the needs of the learner and make better use of the training package.
- Given the micro size of many outdoor/adventure/eco tourism operations, opportunities to access traineeship funding for owner / operators may be advantageous. That is, up-skilling the existing operators to the levels also required of their support staff will encourage further development of the professionalism of this growth sector and better meet the strategies as outlined in the Tourism 21 document.
- (It is accepted that the Environmental Tourism Training and Employment programme may have contributed to this recommendation already)

3.4.8 Information on training demand being met outside the Tasmanian public system.

As a specialist area and given the intensity of off site delivery, the outdoor recreation, eco adventure and natural and cultural heritage Drysdale, TAFE Tasmania, mainly delivers related units. Independent RTOs offering fee for service training in this area are insignificant.

3.5 Eco Tourism

3.5.1 Characteristics of the existing workforce

Given the relatively ill-defined nature of this sector, it is impossible to suggest existing workforce numbers. The sector includes independent specialist tour operators through to major tourism icons such as the Tahune AirWalk.

Occupations existing within the sector include guides, general food and beverage attendants, tour operators and outdoor recreation employees.

However, the increase in demand for such services is increasing in Tasmania as it is globally.

3.5.2 Normal drivers of training demand

Given the popularity of this sector and icon status of attractions like the Tahune AirWalk the eco tourism sector is under pressure to meet the demands of visitors in terms of customer service and interpretive, 'experience' based need. Often existing in regional areas and employing local people the skill base required by professional tourism/hospitality business is often different to that which exists already. That is, basic customer service, interpersonal and broader skills related to the provision of the tourism product needs to be improved.

3.5.3 Changes occurring in demand for training

Increase in demand for eco tourism experiences and improvements to the delivery of the service/experience in such businesses. New developments across the state (Cradle Mountain, Dismal Swamp etc) will increase demand for flexible training and learning.

3.5.4 Changes required to the nature of training

As already stated, the regional location of many eco tourism attractions/operations means that RTOs need to take their training to the customer. Flexible delivery and non-institutional based training has to be available. Also, customising training packages to the needs of the particular

business is required – one size does not fit all. This is a disparate and varied industry group and therefore required skills will also be varied. It is suggested that the full extent of the allowed flexibility of the training packages will be required as functional units from hospitality and tourism may be useful to operators. As already stated interpretive skills will be a useful inclusion to meet the demand for multi-skilled and competent employees.

Consideration should be given to the needs of those changing career. Mature learners may have differing needs to those who are used to the concept of lifelong learning.

3.5.5 The target market for training

The target markets for training in this sector include:

- School leavers entering the workforce
- Existing employees/employers
- Job changers
- The 'underemployed' (those requiring second jobs to augment income)

3.5.6 Numbers of people that need to be trained

Again, given that there is not an identified skills shortage in this area at the present time it is suggested that the existing ETTEP programme will address immediate needs and the TAFE system will adequately respond to demand as it arises.

3.5.7 Recommendations for the appropriate response by the training system to demand/supply imbalances.

See recommendations at 3.4.7

3.6 Caravans and Holiday Parks

3.6.1 Characteristics of the existing workforce

The following table illustrates the major characteristics of the relevant workforce for which statistics are available.

Job^^	Estimated numbers # (Tasmania)	Gender Mix	Attrition %	Full time employment *	Main Age group
Caravan Park and Camping Ground Managers	285	42.9% F 57.1% M	35.5%	87.1%FT 12.9% PT	55+ years

Notes: Figures current as at December 2002

^^As defined by DEWR Job Outlook

#As suggested by Tasmanian proportion of national figures

*Part time labour includes casual labour figures

(<http://www.jobsearch.gov.au>, June 2003)

According to the Caravan and Holiday Parks Strategy (circa 2000) (<http://www.tourismtasmania.com.au/tasind/caravanstrategy/index.html>) the sector accounts for more than 1.5 million room nights each year. It is anticipated that that figure will have increased given improved access for motor homes and caravans visiting Tasmania via Spirit of Tasmania I & II. Also, caravan and holiday parks supply almost half of all commercial accommodation outside the major centres of Hobart and Launceston.

The shifting demographic (ie. aging population) is expected to increase the demand for motor home/cabin/caravan accommodation into the future.

The Caravan Industry Training Package covers the following:

- Caravan park operations
- Caravan park supervision and management
- Recreational vehicle manufacturing
- Recreational vehicle servicing
- Recreational accessories and retailing

Given the scope of this TDP the relevant content of the package is caravan park operations, supervision and management.

The majority of parks are family owned and run using casual labour to augment the workforce.

3.6.2 Normal drivers of training demand

Given that the training package has not yet been implemented in industry by an RTO it is difficult to suggest normal drivers of training demand in this sector. However, outside of the package, training in the caravan and holiday park sector has been sporadic and limited to that which individual operators have required.

3.6.3 Changes occurring in the demand for training

It is recognised that a need for increased professionalism in the sector will drive training demand. Operators are requiring more skill in business management as well as sector specific skills.

The increase in visitation to the state and the growth in this sector is encouraging many who may have moved into the industry as a lifestyle change to consider training toward a qualification and professional development opportunities.

Growth in the number of parks, especially in regional areas, is encouraging training for those entering the industry.

Given the current negotiations surrounding the acquisition of a new ferry to operate between Sydney and Devonport, the market for motorhome/caravan and park users will be greatly enhanced due to improved access for those on the northeastern seaboard.

3.6.4 Changes required to the nature of training

Again, regional issues suggest that flexible forms of delivery will need to be implemented. Also, given the nature and size of many of the establishments concerned, access to training must be timely and structured toward upskilling existing employee/employers as well as new entrants. Benefit would be gained

from a self paced, workplace assessed mode of delivery and assessment. Also, it is suggested that use be made of the existing network of parks to assist in the mentoring aspect of training delivery.

It is imperative that the training package be implemented as soon as possible to allow for a consistent and tailored approach to training in this sector. Drysdale, TAFE Tasmania is currently working toward this goal.

3.6.5 The target market for training

The following are identified as major targets for training in this sector:

- Employers
- Existing employees
- Job changers
- Unemployed

3.6.6 Numbers of people that need to be trained

Anecdotally there is evidence to suggest that most existing employees in the industry would gain advantage by way of skill development or recognition of existing skills should the training package be widely implemented and accepted by business. New entrants to the industry would benefit from accessing recognised training. However, it is impossible to indicate specific numbers at this time.

3.6.7 Recommendations for the appropriate response by the training system to demand/supply imbalances.

- The first and most pressing recommendation is to ensure that a registered training organisation, the industry and operators alike support the training package. Specific and tailored training must be available to operators if the desired professionalism of the industry is to improve and adequately meet the demands of the visitor.
- Offer short, sharp focused 'bundles' of units in a flexible manner. The combination of portfolio assessment, on line delivery and face to face delivery may present employers (especially those in regional areas) with options for their staff or themselves.

- Determine whether the qualification as an end in itself is required (eg for new entrants into the industry) or whether the individual is looking for development opportunity only (management and existing employees). This enables the RTO to better customise the training content and delivery mode to the needs of the learner and make better use of the training package.
- Given the micro size of many caravan and holiday park operations, opportunities to access traineeship funding for owner / operators may be advantageous. That is, up-skilling the existing operators to the levels also required of their support staff will encourage further development of the professionalism of this growth sector and better meet the strategies as outlined in the Caravan and Holiday Park Strategy document.
- (It is accepted that the Environmental Tourism Training and Employment programme may have contributed to this recommendation already)

3.6.8 Information on training demand being met outside the Tasmanian public system

According to research undertaken for this TDP no RTO is currently delivering/assessing under the Caravan Industry Training Package. Other training may be accessed outside of the public system on an ad hoc basis but is deemed to be insignificant.

3.7 Travel

3.7.1 *Characteristics of the existing workforce*

See table at 3.4.1

The travel sector is comprised of the following occupations:

- Domestic and international travel consultants
- Wholesale travel consultants and operators
- Visitor and information consultants
- Travel agency owner/operators
- Reservation and check in operators
- Call centre personnel

3.7.2 *Normal drivers of demand*

Research undertaken for this TDP indicates that new entrants seeking employment in the travel sector are mainly driving demand. It is also suggested that there may be an oversupply of trained travel agent/consultants for the numbers of jobs available in Tasmania.

As already suggested opportunities to undertake units in specialist fields (such as meeting and events) are being readily undertaken by those seeking training in travel and tourism pathways. This is resulting in a shift in the demand for particular units or sets of units, not necessarily the overall qualification. (eg. the Certificate III Meetings and Events can articulate into a more general advanced diploma)

3.7.3 *Reasons for changes in demand*

Changes to demand are appearing mainly out of the preferences of those undertaking training, not employer or industry need.

3.7.4 *Changes required to the nature of training*

Industry representatives suggest that the way in which training is currently being delivered is mostly satisfactory. However, as previously indicated, a more thorough induction giving realistic expectations of the actual work available on completion of training is required. The expectations of many graduates are

unrealistically high. That is, many expect to find work immediately in supervisory or management positions not realising that employers are looking practical experience coupled with formal qualifications. Interviewees suggested an expansion on the work placement or 'hands on' component would go some way to alleviating this issue.

3.7.5 Target market for training

Currently the target market is school leavers and those seeking a career in travel. However, the increased interest in professional development is bringing existing employees and employers to the training market.

3.7.6 Numbers of people that need to be trained / Comments on any government funded training provision in excess of local industry needs.

Currently, an oversupply of graduates exists compared to the available job vacancies. Research indicates that the Advanced Diploma level training is beyond current industry needs and may be contributing to the migration of graduates out of the state. However skills at the Certificate II and III level are more fitting to the demand currently found in Tasmania. So too, specialist skills in meetings and events coupled with general travel competencies would be advantageous given the increase in convention/meeting/events activity and sophistication of demand in the state.

3.7.7 Recommendations for the appropriate response by the training system to demand/supply imbalances

In line with the above, it is suggested that the current demand exceeds local industry demand. However, given the nature of the industry it is expected and beneficial for individuals to take the opportunity to leave the state and experience other states, countries and cultures. It is recommended that:

- More work placement be available to those in training.
- A more realistic induction to industry demands will alleviate the dissonance between what is expected and what is reality.

- Concentrate on delivering a broad skill base across travel and tourism competencies to assist with employment options.
- Where development opportunities are sought for existing employees/employers, flexibility of delivery (workplace assessment, self-paced workbooks etc) be available to assist with access to training.

3.7.8 *Information on training demand being met outside the Tasmanian public system*

Research suggests that the clear majority of travel training is provided by the TAFE system. Correspondence courses exist but it is anticipated that the uptake of such courses is insignificant.

3.8 Additional industry advice not directly related to industry demand for training (all sectors)

The following issues were raised by industry representatives across all sectors and do not relate specifically to training package delivery per se:

- Literacy and numeracy issues must be addressed. That is, there is a general lack of ability to adequately perform the required tasks in the workplace in terms of written communication and functional / applied maths.
- It is reported that there is a common lack of understanding of a 'culture' of service. Individuals have practical skills but are without the underpinning appreciation of the holistic delivery of service as an experience.
- General misunderstanding of the demands of the industry (including personal presentation and demeanor) and of customers/visitors and the service response that is required.
- Interpersonal skills. The ability to perform practical tasks with confidence whilst simultaneously communicating effectively with customers and colleagues is poorly developed. Also, an understanding of the requisite command of teamwork is reportedly poorly displayed by trained jobseekers.

PART FOUR

Assessment of physical infrastructure needs

4.1 The ability of the existing building, plant and equipment infrastructure (in the publicly funded training system) to meet current and anticipated needs.

Given the move to a more flexible delivery method, the role of physical bricks and mortar in the training environment is becoming less and less important. More significant is the connection to industry through training partnerships and collaborative delivery and assessment activities (eg Hotel Grand Chancellor-Drysdale Hotel School, Federal Hotels projects etc). It is anticipated that more delivery will be conducted in regional areas to better support the emergence and development of clusters, hubs and routes and the individual developments in regional areas.

At the current time the physical infrastructure is reported to be adequate as more creative and non-traditional forms of delivery are being explored. Workplace assessment, on line delivery, self paced units and timetabling outside of normal term times is extending the utility of the current infrastructure. However, it must be stressed that if continuing to move to delivery and assessment outside of traditional campus based means, training outcomes must not be compromised.

Flexible delivery should not be seen as a panacea for infrastructure inadequacies. As discussed throughout this document, training demand will increase with industry growth and although TAFE indicates that the needs of industry are being met at this time, more detailed research needs to be conducted to assess the needs into the medium and long term.

The forthcoming TCT research project 'Delivering the Experience' will provide more insight into the actual infrastructure needs to adequately meet training demand. A more accurate picture may be gained from comprehensive research.

4.2 Recommendations

- Utilise the existing infrastructure outside normal term times on a more consistent basis.
- Encourage the flexibility allowed under the training packages and support non-traditional forms of delivery where appropriate.
- Create regional centres of learning to encourage access to training by regional operators.
- Forge more partnerships with businesses and clusters of businesses to increase the efficacy of training in groups, especially in remote areas.
- Encourage mentoring opportunities for those looking to gain recognition of skills through a portfolio of evidence. It has been recognised that the process of developing a portfolio is deemed too complicated and time consuming to make it attractive to those for whom it may be of benefit.
- Cluster units to ensure that 'doubling' up of delivery is avoided and provide a more focused approach to holistic assessment.
- Offer units or sets of units as stand alone development opportunities where full qualifications are not warranted or required.
- Undertake a more thorough analysis of the demands on infrastructure in the medium to long term.

PART FIVE

Information on VET in schools and articulation

5.1 Qualifications and pathways appropriate for delivery through a VET in schools programme.

<i>Course Code</i>	<i>Course Title</i>	<i>Enrolments 2002</i>
THT20502	Cert II in Tourism (Operations)	110
THH11197	Cert II in Hospitality (Kitchen Operations)	84
THH11002	Cert I in Hospitality (Operations)	78
THH21897	Cert II in Hospitality (Operations)	74
THH11097	Cert I in Hospitality (Operations)	61
THH21802	Cert II in Hospitality (Operations)	57
THT20198	Cert II in Tourism (Sales/Office Operations)	46
THH11102	Cert II in Hospitality (Kitchen Operations)	42
THT20498	Cert II in Tourism (Attractions and Theme Parks)	5
THH21297	Cert II in Hospitality (Commercial Cookery)	1
THH21397	Cert II in Hospitality (Patisserie)	1
THT30398	Cert III in Tourism (International Retail Travel Sales)	1
TOTAL		560

(VET Provider Collection 2002)

As is indicated by the table, the most popular VET programme for 2002 was Certificate II in Tourism operations. This is indicative of the move toward programmes that are perceived to have a strong tourism base and may offer employment outcomes. Anecdotal evidence suggests that tourism is perceived to offer broader opportunities, but is also related to the lack of career focus of many students who like to have many options available to them.

5.2 Development and support for VET in schools programmes

Although colleges have formed their own networks supporting VET in schools delivery and are gaining limited input from industry there is little structured involvement from broad industry representative bodies in the VET in schools programmes. However, all indicated that if approached, requested involvement

would be forthcoming. It is suggested that to improve the dialogue between industry and VET in schools, more of a concerted effort should be made to include all relevant stakeholders. This may need to be facilitated undertaken by a third party or organising body.

5.3 *Emerging opportunities*

Given that the majority of foundation units are delivered in the Certificate I and II pathways, it is imperative that the basics of tourism and hospitality 'culture' are communicated. This would include:

- Illustrating accurately the demands of industry to students.
- Developing interpersonal and communications skills to a greater functional degree.
- Providing support where literacy and numeracy issues exist to prepare students for the workplace.
- Develop the 'culture' of service as already discussed.
- General growth in visitation is fuelling demand for operational staff. If competence can truly be developed at the school level, work opportunities may increase.
- Demand for more interpretive skills could see the inclusion of relevant units to non-tourism specific courses.

5.4 *Issues in implementing VET in schools.*

- It is desirable that teachers in VET programmes have a thorough understanding of the vocational demands of industry and of operators.
- A more rigorous approach to assessment in work placements. Reportedly, many employers who provide work placements and provide auspiced assessments are unaware of the gravity of the responsibility placed upon them. That is, VET in schools is still thought of as a 'work experience' programme, not an avenue to gain a nationally recognised qualification.
- The need for increased commitment and awareness of VET in schools responsibilities and requirements from industry.
- Sufficient time and experience within industry work placements to allow the development of competence is questionable.

- Core units are thought of as 'Mickey Mouse' units and treated with less rigor than they deserve. These are foundation elements and should be taken seriously.
- Industry is not as supportive as it should be.
- 'Tick and Flick' is still too prevalent. This is evidenced by reports of enterprises employing people on the strength of qualification and finding that the new employee is unable to perform even basic tasks for which they have been deemed competent. This is devaluing the programme as a whole within industry.

5.1 Articulation from schools to post-school VET and higher education.

Credit transfer is allowed in the TAFE system as per mutual recognition requirements, but where competence can not be demonstrated or repeated, students are encouraged to avail themselves of further training by repeating the unit in another context.

It is unlikely that VET in schools qualifications will be recognised at university level to any significant degree in the near future. It must be acknowledged that the competency based system and the university assessment system does not lend itself to an easy 'dovetail' between the two. That is, the reliance on the synthesis of theory at university is not as relevant in the VET in schools programmes which relies heavily on the concept of practical competence.

PART SIX

Industry's top priorities for the public training system

Priority One – Customer Service

As identified in the body of this report, customer service issues are an enormous concern to industry. Given the increase in visitation and growth across the industry it is imperative that statewide and industry wide, customer service skills are improved.

This may not necessarily be achieved by customer service training per se. The management issues of customer service have to be addressed also. That is the ability of employers, managers and owner operators to encourage a 'culture of service' that allows frontline employees to carry out the customer service function.

Therefore, a concerted effort across the board needs to be implemented. Starting with the VET in schools sector, the value of customer service needs to be absolutely clear to those entering the industry. At the Certificate III level and beyond the development of customer service infrastructure needs to be recognised (eg. supporting processes, servicescape issues and marketing congruence) and at management level, the impact of human resource management and marketing issues on the customer service function must be communicated and understood. This has broad implications for the delivery of training for if the strategies in Tourism 21 are to be implemented successfully. Nothing short of a concerted effort in this regard will be successful.

What will this priority achieve?

An increase in customer service provision and a development of the understanding of the broader nature of that which supports the frontline delivery of service.

What current action is in place to address this priority?

Currently a partnership between the TCCI and Drysdale is being formed to provide audits and recommendations to operators on customer service issues.

The accreditation process goes some way to communicating the importance of supporting infrastructure to the delivery of customer service.

A more concerted and focused approach is required, however.

What are the consequences if action is not taken?

Tasmania will not be able to meet the demands of the Tourism 21 strategies and fail to capitalise on the increase in visitation. Certainly, return visitation will be compromised and revenue will be lost.

Priority Two – Address skill shortages

Skill shortages in commercial cookery and management skills need to be addressed in the very near future. Again, growth in the industry is fortuitous for us all, but if operators are unable to manage demand and provide appropriate experiences Tasmania will fail to capitalise on the future visitation due to a damaged reputation.

What will meeting this priority achieve?

Quite simply, a more professional industry that is attuned to the needs of its guests/visitors and better-managed businesses improve the opportunity for employment and profit.

What current action is in place to address this priority?

The Frontline Management Initiative has gone some way to developing momentum in management training, but this has to continue on a more widespread basis.

The ETTEP has made some improvements in this area.

Initiatives designed to retain professional cooks and attract new ones into the industry have had little success.

What action is required and what are the consequences if action is not taken?

In terms of management, more access to funding by owner/operators for training at Certificate levels IV and above. As indicated a substantial proportion of operations in the state are owner operated denying many of access to training funds.

Flexibility of delivery and mentoring for mature aged learners. Again, the ETTEP programme has made access easier and has to continue.

As above, the strategies outlined in the Tourism 21 document will not be fully implemented or realised if action is not taken.

Priority Three – Customisation and Flexibility

The demand for training in regional and remote areas is clear. Developments all over the state are bringing with them demand for operational and managerial skills training. The public system must avail itself of the flexibility offered by the training packages to ensure that industry needs are met. That is, identify the need, customise the training and look not to the qualification outcome, rather the functional outcome for the individual and the business.

What will meeting this priority achieve?

A more committed approach to training and development in the industry. Common problems include the difficulty of accessing training, paying for training and the rigidity by which it is delivered and structured. Creativity within the requirements of the package should be sought over remaining with the comfortable, if true functional, efficient and effective outcomes are to be brought about.

What current action is in place to address this priority?

Some flexibility is available but more needs to be introduced through workplace assessments, regional centres of learning and partnership arrangements.

What are the consequences of not meeting the challenge?

Industry malaise regarding training will continue. Outcome driven training that is accessible and affordable is imperative. Again, the demands of the visitor market and that of Tourism 21 will not be met if skill development is not embraced by industry or offered in an appropriate 'package' by the public training system.

Hence, statewide benefit of increased visitation and yield will be shortlived as service standards will continue to be below expectations.