

Tourism

Visitors to Western Australia and the money they spend are at record levels.
Interest in Aboriginal Tourism continues.

Current Industry Environment

Tour Arrangement Services workers deliver tours and operate tourist attractions. Through their work, they provide tourists with once-in-a-lifetime experiences and help make lasting memories.

Tourism activity has brought a record number of 34.1 million visitors to Western Australia, and the \$10.5 billion income from the money these tourists spent in WA during the last financial year, helps to support a wide range of industries across the State.¹

Australians are known as prolific travellers. Increasingly, Western Australians are holidaying at home. 3.7 Million intrastate holiday trips were recorded in 2018-19, with Western Australians spending \$2.3 billion in that period.²

When combined with travel agencies, tour operator services employed 8,100 people, 11% of the broader tourism workforce in Western Australia and contributed \$1.13 billion to WA's direct tourism GVA (or Gross Value Added), the largest single contributor in 2017-18.³

Visitor experience

The greatest proportion of visitors in the last financial year came to WA for a holiday.⁴ According to visitor experience data, WA's tourism workers are performing well, with visitors enjoying the state's attractions and activities (second to WA's natural environment) and WA's people/ customer service coming in in fifth position, after weather and the relaxing atmosphere.⁵

Perth has been voted Australia's friendliest city by the travel site *Big 7 Travel*. Based on feedback from their global social media audience, Perth is Australia's friendliest "thanks to its lively locals, engaging social scene and ease of access for first time visitors. Perth is a wonderfully vibrant and social place to be. Expect to make new friends in every bar you go to".⁶

Aboriginal Tourism

Aboriginal Tourism continues to be an important part of WA's tourism delivery. Majority of visitors have an interest in participating in an Aboriginal tourism activity, if it were easily accessible. However, participation remains low, with only one in five visitors (21%) having an Aboriginal tourism experience in 2018-19. Visitors are most interested in taking a tour with an Aboriginal guide. This reflects that there is opportunity to increase supply and improve awareness of Aboriginal tourism experiences to meet visitor demand.⁷

Regional Tourism

Regional tourism in WA is growing. Visitors spent \$4.9 billion or 47 per cent of total spend, in regional WA in 2018-19.⁸ Building on this growth, Tourism Council WA have developed a consumer marketing campaign, *Holiday in WA*, to promote Quality Tourism Accredited Businesses in WA and get consumers book directly with these businesses.

Another marketing campaign, involving an agreement between Tourism WA and Cruise and Maritime Voyages (CMV Australia), promotes WA ports of Fremantle, Broome, Geraldton and Kuri Bay, along with shore trips to Margaret River, Busselton and Rottnest Island.

A snapshot of Tourism

Tour Guiding | Adventure Activities Guiding | Tourist Attraction Operators | Scenic and Sightseeing Transport | Tourism Development Consulting | Visitor Centre Operators | Destination Marketing



11.1% of WA total tourism employment is in Travel and Tourism*

8,100 workers employed in Travel and Tourism in WA in 2017-18*

4,400 workers in cultural, and sport & other recreation services*

It was a significant economic contributor to WA's direct tourism GVA in 2017-18*

\$1.13b

contributed by Travel agency & tour operators



\$159m

contributed by Cultural, Sport & Recreation services



The future workforce requirements

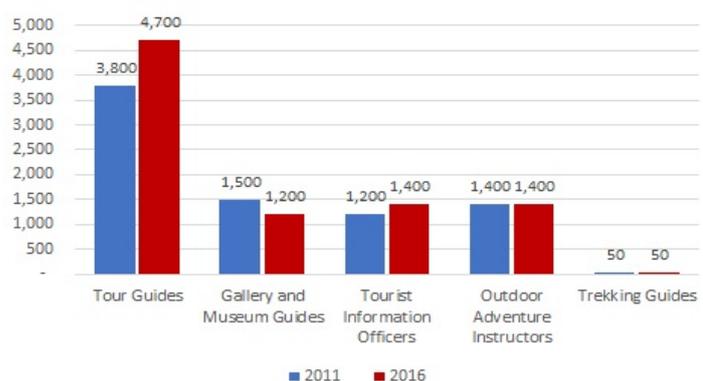
Aboriginal Tourism in 2018-19**

81% Interested
21% Participated

Most interest lies in:

- tour with Aboriginal guide
- experience bush food
- Aboriginal dance/performance
- Aboriginal gallery
- Aboriginal cultural centre
- Aboriginal art, craft or display

Tourism Workforce Projections - Australia***



References:

* Tourism WA; Economic Contribution of Tourism to Western Australia 2017-18; August 2019 ***Australian Government JobOutlook

** Tourism WA; Visitor Experience and Expectations Research (VEER) 2018-19; August 2019

Industry Developments and Prospects

Due to the high level of personal interaction and the fact that tourist activities are based largely around peoples' leisure and enjoyment, word of mouth recommendations are of vital importance in this sector. Therefore, customer service skills are imperative, and the occupations in this sector are firmly about 'attitude' and the worker being a 'people's person'. The technical skills associated with leading a tour group can potentially be taught on-the-job.

Tour guiding

Workers delivering tours require in-depth knowledge of the local destination's tourism products such as the culture, landscapes or built environment, flora and fauna, or food and wine. These jobs are ideally suited to long-term residents with immersion in the local environment.

Depending on the type of tour operation businesses, tourist and sight-seeing transport can be an integral part of the operation. Within these businesses, the appropriate licencing to operate tourist vehicles or vessels such as tour coaches, 4-wheel drive trucks, super-yachts, trains, or aircraft is a worker pre-requisite. Depending on the size of the vehicle or vessel, workers are often required to combine technical driving skills with providing commentary and assisting tourists. All workers are expected to show social or cultural sensitivity.

Increasingly, Asian language proficiency is becoming imperative due to the increase in the Chinese tourist market. This is generating additional jobs in that both a driver/ local guide and an interpreter are required for certain tours. As such, Mandarin-speaking interpreters are employed to accompany tours. However, this creates increased costs for the business and increased requirements in human resourcing to manage the changes people and culture of new teams working together

Migration and the Tourism industry

The Working Holiday Maker (WHM) market represents economic value to Australia, because they spend more than other international visitor groups, stay longer, and travel further into regional areas. The 'backpacker' market generates more tourism and hospitality jobs for Australians, while this group satisfies labour needs in regional areas where there might be shortages. Caps on visas have been extended for backpackers from Argentina, Malaysia, Singapore, Portugal, Spain, Israel, Peru. In 2019, Chile, Greece and Ecuador have been added to the WHM visa program.⁹

Debate at the federal and state level continues in relation to visa regulations. As of 16 November 2019, Perth will be reinstated as a regional area for the purposes of nominating international skilled workers and students to fill occupations facing shortages.

Current and Future opportunities

Rottnest Island – Volunteering and Aboriginal Tourism

Over 300 volunteers are engaged to promote Rottnest island's natural and cultural history, and to deliver the 'Meet the Quokka' escorted tour. In addition, Aboriginal cultural walking tours delivered by Go Cultural Aboriginal Tours and Experiences gives visitors the opportunity to experience traditional Aboriginal culture and learn about the spiritual significance of Wadjemup (Rottnest Island) to Noongar people.

Tourism 2030

At the national level, the Australian Government through Austrade commenced consultation on the *Beyond Tourism 2020* strategy to set the path for the Tourism sector to 2030. A key goal is the establishment of a suitably skilled and available workforce to align with Australia's world-class positioning.

Other Opportunities

Programs and strategies aimed at building capacity in the Tourism and Travel workforce in Western Australia include the following:

- Building on the increased visitor numbers to WA, Tourism WA developed a Tourism Attractions Case Management framework to assist in the establishment of new innovative tourism businesses in WA. This is expected to increase the range of tourist attraction offerings in WA, and the number of associated jobs.¹⁰
- To grow the number of students from around the world coming to study in Perth, the International Education in Western Australia strategy 2018-2025¹¹, developed in partnership with StudyPerth, was launched in October 2018, highlighting the unique learning experiences on offer in Perth.
- The Australian Tourism Export Council (ATEC) in partnership with Tourism WA and supported by AHA (WA) have launched the inaugural Japan Host export program. The program developed in partnership with leading Japanese travel wholesalers to coincide with the launch of ANA's direct flights from Perth to Tokyo in September 2019, will provide WA tourism operators with a 'MasterPath' to success in the Japanese market, including providing an overview of the Japanese inbound market and how to engage the Japan travel trade to establish themselves in the market.

Tourism and Hospitality Workforce Project

In recognition of the important contribution this industry makes to the Western Australian economy, the State Government is undertaking a project measuring the skills needs in the broader Tourism and Hospitality industry. The project will inform the State Government's Tourism and Hospitality Workforce Development Plan.

Skills and training strategies

Cruise Shipping

Formal training for workers on cruise ships can be difficult. Many of the workers onboard are international workers. Staff are rostered on the ship at different times and turnaround time is typically one day, making delivery of face-to-face training difficult. To address this, North Regional TAFE are considering delivering one or two units of competency to staff on Kimberley expedition cruise boats.

North Regional TAFE have also been successfully delivering tourism qualifications to Indigenous communities on country. Training to communities is now addresses cruise boats visiting their land as boats require permits to visit along the Kimberley coast.

Tourism WA provides funding to Tour Guides WA to deliver unaccredited training for onshore tour guides working with the cruise sector in Geraldton, Busselton, Albany and Esperance.

University courses available in WA

Edith Cowan University, Curtin University and Murdoch University offer Tourism as a major in undergraduate Business or Arts degrees. Students can gain practical workplace experience during their degree through the Work Integrated Learning (WIL) programs available at each of the three universities. Placements occur within tourism industry associations, destination or tourism development consultancies, or hotels. The outcomes of this program are twofold. Graduates have improved rates at securing a job after completing their studies, and employers have access to passionate entry-level workers, already familiar with the business.

Current VET delivery to address industry needs

The Marine Discovery Tour, created and delivered by Tourism and Business students at Central Regional TAFE

(CRTAFE) in Geraldton, provides real life work experience for students. The tour visits Geraldton Fisherman's Co-operative live Western Rock Lobster Factory and the Batavia Coast Maritime Institute (BCMI). Commercial Cookery students prepare – and Hospitality students serve – a two-course lunch at CRTAFE's training restaurant 'Zeewijk'.

Certificate IV in Travel and Tourism

The SIT Tourism, Travel and Hospitality Industry Reference Committee's 2019 Skills Forecast proposes the Certificate IV in Travel and Tourism be split into two separate qualifications. This is due to the diverse job roles that apply to each of the two disciplines. The result in Certificate IV in Travel separate to Certificate IV in Tourism.

Training products related to Aboriginal Tourism

Aboriginal tourism businesses require training in business management, marketing, finance and administration.

Industry report demand for Aboriginal tourism operators and employers to access to Indigenous Culture units of competence, in combination with business units at all Certificate or Diploma levels. Certificate I in Tourism (Australian Indigenous Culture), is the only tourism qualification at Certificate I level, and the only qualification within the SIT Training Package that has Aboriginal tourism components in the core of the qualification. There is broad support for inclusion of Australian Indigenous Culture in all levels of tourism qualifications, and to establish a general tourism qualification at Certificate I level, to provide a foundation of learning about the tourism industry.

Industry advise that Indigenous protocol requirements must be an important consideration when the specialisations are developed for respective Australian Qualifications Framework levels.

Please get in touch

FutureNow is seeking regular input from stakeholders about workforce matters in the Western Australian Accommodation Industry. If you are interested in providing further information about the workforce in this sector, the Industry Manager would like to hear from you.

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References

1. Tourism WA, Visitation to Western Australia: Overview, Year Ending June 2019, September 2019
2. Tourism WA, Visitation to Western Australia: Overview, Year Ending June 2019, September 2019
3. Tourism WA, Economic Contribution of Tourism to Western Australia 2017-18, based on Tourism Research Australia's State Tourism Satellite Accounts 2017-18, August 2019
Note: as per Tourism WA, GVA or Tourism Gross Value Added is considered the most accurate measure of the contribution of the industry to the economy. It includes the total labour income and capital revenue received by the industry and the net taxes that government receives from the production, and is measured in basic prices. Direct and indirect flow-on GVA are measured separately using the Tourism Satellite Account framework and I-O modelling techniques, respectively. Combined, they provide an estimate of total tourism GVA.
4. Tourism WA, Visitation to Western Australia: Overview, Year Ending June 2019, September 2019
5. Tourism WA, Visitor Experience and Expectations Research (VEER) 2018-19, August 2019
6. Big 7 Travel, <https://bigseventravel.com/2019/10/friendliest-cities-australia/> October 2019
7. Tourism WA, Visitor Experience and Expectations Research (VEER) 2018-19, August 2019
8. Tourism Research Australia, International Visitor Survey and National Visitor Survey results, Year ending June 2019, released 9 October 2019
9. The Hon David Coleman MP joint media release with the Hon Simon Birmingham; Working Holiday Visa expansion has benefits at home and abroad; 1 July 2019
10. Tourism WA; Industry support; Investing in WA tourism; Tourism Attractions Case Management; https://www.tourism.wa.gov.au/Industry-support/Investing-in-WA-tourism/Pages/Tourism_Attractions_Case_Management.aspx#/
11. Department of Jobs, Tourism, Science and Innovation (JTSI) and StudyPerth; Where bright futures begin, International Education in Perth, Western Australia 2018-2025, October 2018