QUEENSLAND TOURISM WORKFORCE CRISIS RESILIENCE & RECOVERY PROJECT

REGIONAL CONSULTATION WORKSHOPS AND NATIONAL SURVEY REPORT

QUEENSLAND TOURISM INDUSTRY COUNCIL
The Voice of Tourism

THE UNIVERSITY OF QUEENSLAND
AUSTRALIA
CREATE CHANGE

DATE 13 December, 2022

PREPARED BY
The Queensland Tourism Industry Council
in partnership with The University of Queensland

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Acknowledgement of Country

The Queensland Tourism Industry Council acknowledges the Traditional Custodians of the lands on which we work and live across Queensland, and recognises their continuing connection to the land, waters and culture. We also pay our respects to all First Nations people, past, present and emerging.

About the Queensland Tourism Industry Council

The Queensland Tourism Industry Council (QTIC) is Queensland's peak tourism industry body and the leading advocate for Queensland's tourism and hospitality sector. QTIC represents the interests of the state's more than 60,000 tourism businesses and more than 800 members across Queensland working in all sectors of the tourism and hospitality industry.

QTIC acknowledges the generous contributions to this document made by many QTIC members.

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EXECUTIVE SUMMARY

Further in-depth analysis of the 2021 survey (priming data collection for 2022) found several significant **predictors of tourism employee resilience**. At the individual level **'emotional intelligence'**, and at the operator level **'organisational learning culture' and 'organisational adaptive capacity'**, are the strongest drivers of employee resilience. Two individual level motivational factors, however, activate employee resilience: self-efficacy ("I can do this"), and/or a strong sense of meaning ("Why should I do this?"). For **volunteers a strong 'sense of impact' predicted their resilience**. Macro-level business supports (e.g., JobKeeper) and market incentives were also significantly positively related to employee resilience.

Across the five regional workshop consultations, the common themes, elicited from 55 participants, were that **poor industry image, lacking job security, ambiguous career pathways, lack of investment** in (and take-up of) **training and education, a diminishing pipeline of youth, availability of affordable housing, poor leadership practices, competition from other sectors in a tight labour market, a renewed interest in work/life balance** and issues with **availability of the international workforce** were key drivers of labour and skills shortages. Micro, small and medium sized businesses where most vulnerable to these environmental forces.

For potential workers industry image, training, career pathing, secure contracts and more dignified working conditions were suggested as **drivers of attraction and retention. Ageism surfaced as a significant issue** across several regions. A sense that **individual resources for resilience are quite depleted. For organisations** investing in positive leadership and fostering collegiality within work teams, and recognising that the capacity of businesses **to learn, be flexible and adapt were keys to organisational resilience**. At **the destination level**, accessing under-employed groups, embracing collaborative business-to-business and stakeholder approaches, more fully harnessing the value of volunteers and offering incentives for youth to remain in-region **were suggested as positive strategies**. The key requests in terms of **government and policy initiatives to aid recovery** included a long-term focus breaking from electoral cycles to a framing around a generational policy approach (leveraging off the urgency for Brisbane 2032 Olympic/Paralympic preparedness), investment in resources to rebrand the tourism industry's image targeting key influencers, promote awareness of and access to supports, especially for SMEs, address consistency in messaging across the three levels of government and investment in (and tightening of regulations) for (on-going) training and education.

Regarding the 2022 national survey 340 valid responses were received, with a third from Queensland. The sample was broadly representative of the hospitality, tourism, and leisure workforces and over half of the respondents worked in micro-small or medium businesses. Surprisingly, the sample worked an average of 30 hours weekly, despite the majority of the sample being managers or assistant managers.

Following concerns raised in the regional consultation workshops, a key **focus of the survey was to determine the level of accessibility to COVID-crisis related government support resources** (excluding JobKeeper). Half the sample said they, or their businesses, accessed these resources, and though while satisfied overall, **satisfaction lagged regarding ease of access, timeliness and the monetary value of supports**. A Technology Acceptance Model was used to measure respondents' perceptions of the supports a) perceived ease of use and b) perceived usefulness. 56% of respondents said the supports are easy to use. Regarding usefulness results were evenly split between usefulness and unusefulness, with 25% saying the supports were 'very un-useful'. The **main criticisms were the complexity of the application process, eligibility criteria and delays in access even when approved**. On the other hand, the **vast majority agreed the supports were beneficial, desirable, and necessary and most agreed they would try to access supports in the future**. Nearly half the respondents said the **most important influencer in their decision to access resources was family** followed by supervisors at 25%. Testing a predictive model regarding support access highlights that organisational support facilitates the access and use of the resource and strengthens the positive effects of specific resource features on perceived usefulness.

We also **compared the resilience levels of tourism workers between the 2021 and 2022 survey results**. While self-report resilience, capacity to manage high workloads, ways of doing work, response to feedback, and use change at work as an opportunity for growth all showed **marginal improvements in resilience** it is worth noting that the 2021 survey data was collected while there were still border closures and COVID-19 protocols in place. Also, several Queensland regions showed declines in employee and organisational resilience and/or employee wellbeing. Nonetheless, tourism **workers in Queensland overall experienced a higher level of resilience** compared to other States, in the 2022 data.

Undertaking **an employee and organisational resilience sector comparison** the results show that consistent with the 2021 survey **employee resilience in tourism services (including retail) and food and drink service sectors was significantly lower than employee resilience in the accommodation sector. Regarding organisational resilience the accommodation sector was also significantly higher** than the tourism services and food and drink service sectors. For **employee wellbeing those in the tourism services sector experienced more distress, anxiety, and stress than the other two sectors**. Some of these results are explainable because the accommodation sector was dominated by responses of more mature workers, and those employed in larger organisations. On the other hand, the results are problematic because the sample was dominated by female respondents, and women tend to have better resilience then men. Overall, the only marginal improvements in resilience suggest that the COVID-19 crisis conditions have rolled over into labour and skills crisis conditions, impacting both workers and organisations. Therefore, there is a pressing need for the on-going investigation of issues and continued appropriate and targeted supports and resources. A raft of **recommended managerial, destination and policy support and strategies**, both elicited directly from the data, or inferred from analysis, are listed at the conclusion of this report.

INTRODUCTION

Project Overview

Workforce resilience of the Queensland's tourism industry remains an important topic as the industry looks to build capacity in its recovery from the COVID-19 pandemic impacts. Funded by the Queensland Government's Advance Queensland Scheme, and led by Dr Richard Robinson, of The University of Queensland, in partnership with Queensland Tourism Industry Council, the purpose of this project is to support an informed staged workforce recovery from the COVID-19 pandemic impacts, through the extensive consultations with multiple tourism interest groups: employees, operators/senior managers, and stakeholders. Across 2022 the labour market legacies of COVID-19 brought new but somewhat familiar additional challenges to the tourism and hospitality industries. The findings presented in this report provide further insights into developing resilience and recovery strategies to weather future external shocks via a Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan.

QTIC Chief Executive Officer's Foreword

To augment Queensland tourism's recovery and resilience following the disastrous impacts of the global pandemic, it is important to understand the lived experiences and valuable insights of those connected to the tourism sector and who were affected by the pandemic. For meaningful action and improvement to be made, it is imperative that industry and government formulate recovery measures based on the recommendations of those on-the-ground.

This report is the second of three and summarises the results from a 2022 national survey and regional workshops that took place throughout Queensland. Administered via various channels, including through QTIC and kindred association membership, as well as five of the state's Regional Tourism Organisations, the research provides a richer understanding of the measures that can be taken to best enhance tourism's recovery and resilience.

From tourism operators and employees to policy advisors and destination specialists, the research provides a broad overview of the suggestions of those best placed to offer insight and guidance. We hope this report will serve as a useful resource in driving meaningful recovery projects and future resilience developments.

I would like to acknowledge Associate Professor Richard Robinson and the University of Queensland research team for their efforts in authoring this report and furthering our understandings of the impacts of the pandemic on the tourism sector.

My thanks also go to the QTIC members, the Regional Tourism Organisations and their membership who dedicated their time in facilitating and participating in this valuable joint research project.

Brett Fraser
Chief Executive Officer
Queensland Tourism Industry Council

METHODS & AIMS

In year two of the project, there were four studies, all designed to better understand the impacts of, resilience to, and recovery from the COVID-19 pandemic on different tourism interest groups - and in different regions. This report summarises the findings from two studies:

- in-region consultation workshops, and
- an Australia-wide tourism workforce survey.

The findings from the other studies, which involved interviews with tourism employees, and their significant others, and an experimental-design lab study using biometric devices, will be summarised in a companion report.

Study 1: in-region consultation workshops

Between September and October 2022, five consultation workshops were facilitated in five regions of Queensland: Gold Coast, Tropical North Queensland, Outback Queensland, Southern Queensland Country, and the Whitsundays. The main aim of these consultation workshops was to collect information about tourism workforce changes since 2021, the challenges faced by tourism organisations, the support they are looking for, and the ways stakeholders had sought to address their challenges. A total of 55 participants attended these workshops. All workshops were conducted face-to-face in-region, with some participants joining virtually. Each workshop lasted approximately 2 hours, and conversations were facilitated by the project lead. The workshop was designed in a conversational format with priming questions derived from key findings from this project to date, or from the literature.

The key questions consulted on during the workshops included:

1. **What has changed over the past year in the tourism workforce space in your region?**
2. **What are the key structural issues in tourism employment?**
3. **What are the macro-meso-micro level factors that impact tourism employee resilience?**
4. **How can we improve volunteer resilience?**
5. **What is the impact of COVID-related safety procedures (e.g., mask-wearing and vaccination) on employees?**
6. **Which type and source of COVID-related resources are most effective?**
7. **What are the key reasons for people leaving tourism/hospitality jobs during COVID-19?**
8. **How can the government keep supporting tourism businesses?**

The first set of questions (Questions 1 and 2) are based on the key findings from the Tourism Workforce Consultation Workshops in 2021, as depicted in Figure 1. It shows the differences in pandemic impacts and coping strategies across three interest groups – employees (supervisory level or below), operators (business owners/senior management), and stakeholders (people working "on" the industry, e.g., council, trainers, RTOs, peak bodies, airports etc.).

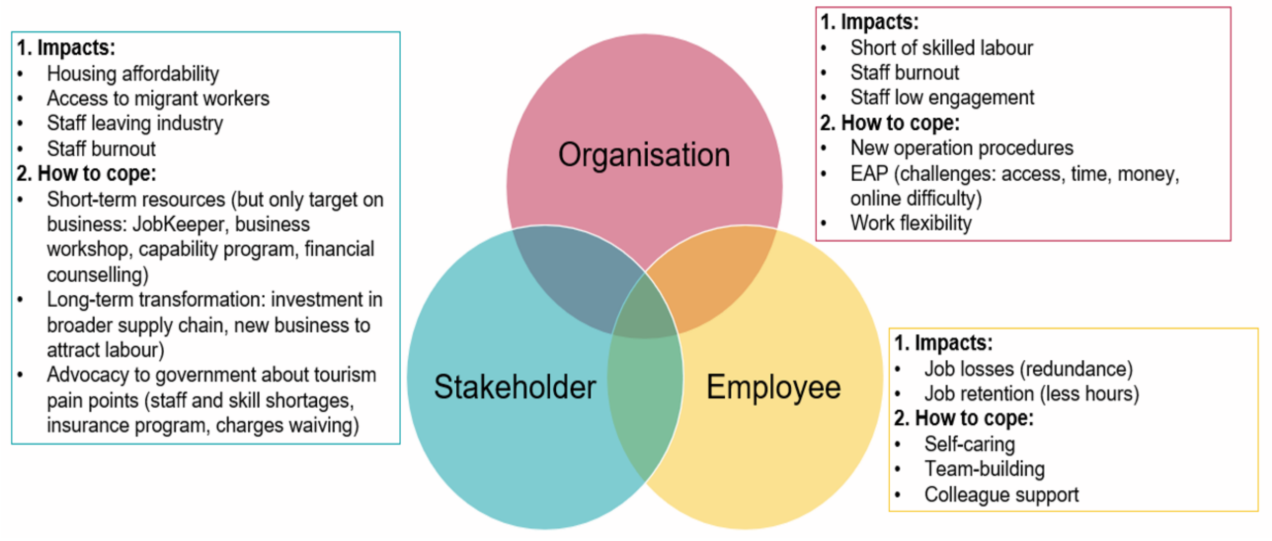


Figure 1. Collective framework of pandemic impacts and coping strategies

The second set of questions (Questions 3 and 4) was based on the results of the analysis using data collected from a national tourism workforce survey, administered in late 2021. The findings from this survey are summarised in Figure 2. At the micro level emotional intelligence, at the meso-level organisational learning culture and organisational adaptive capacity, and at the macro-level business support and market incentives were significantly positively related to employee resilience through two motivational paths - either boosting employees' self-efficacy ("I can do this"), and/or providing them with a strong sense of meaning ("Why should resilient I do this?").

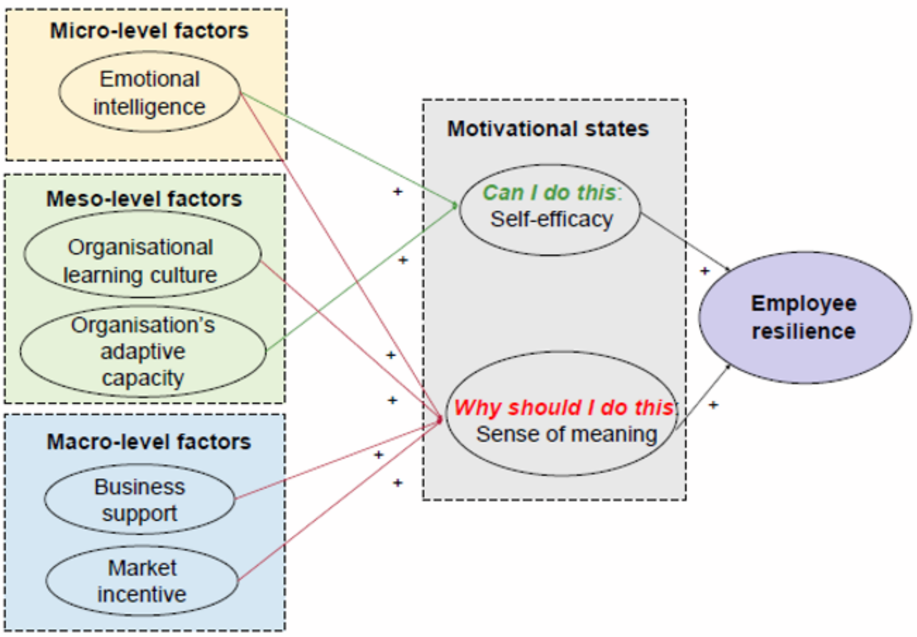


Figure 2. A Macro-meso-micro model of tourism workforce resilience

A subset of the survey with volunteer respondents shows that factors affecting their resilience differ from non-volunteers (paid employees). For volunteers, a strong sense of impact and a strong learning culture in their organisation are the two most significant predictors of their resilience (see Table 1).

	Micro-level factors	Meso-level factors
Volunteer	A sense of impact	Organisational learning culture (strong effect on resilience)
Non-volunteer (paid employee)	Self-efficacy	Organisational learning culture (moderate effect on resilience)

Table 1. Predictors of volunteer resilience

The third set of questions (Questions 5 and 6) are derived from the preliminary experimental lab study findings, that investigated tourism and hospitality employees' crisis experiences and the effectiveness of crisis-related resources. The final set of questions (Questions 7 and 8) are based on the empirical evidence in the tourism workforce literature, which suggests the 'Great Resignation' in the hospitality and tourism industry can be attributed to job-related factors (e.g., low pay, burnout, lack of work-life balance, and insecurity), organisational factors (e.g., lack of training, disrespect, overlooked for promotion, and business failure), individual factors (e.g., follow other passions). Literature also suggests that most factors are not entirely COVID-19 attributable but are underpinned by deeper structural issues that require government support and whole-of-industry and organisational reforms.

Study 2: Tourism workforce survey

After in-region consultations across the State, an Australia-wide survey was administered among tourism, hospitality and related sector professionals in October and November 2022. The survey at the broadest level had three main aims. The first aim was to collect descriptive information about the tourism workforce's characteristics. The second aim was to compare responses on wellbeing, workforce resilience, and organisational characteristics to findings in the previous year's survey – and identify the significant changes in these factors. The third aim was to test a model that examines industry access to, use of, attitudes and experiences with crisis support resources.

The survey was created in the survey platform, Qualtrics®. The survey contained both closed and open-ended questions, grouped into five sections: (a) attitudes toward COVID-related crisis support resources; (b) organisational resilience and learning culture; (c) employee resilience empowerment and wellbeing; (d) demographics; and (e) company and job information. To quality assure the survey, we conducted ten pre-tests with survey design and statistical experts and 20 pilot tests of the survey with tourism employees. We used a variety of survey channels: purchased panel data (via PureProfile1), and distribution to the membership databases of Queensland Tourism Industry Council (QTIC), Queensland Hotels Association (QHA), DWS Hospitality Specialists, The Tourism Group, In-region workshop consultation participants, and Facebook tourism groups. This approach yielded responses from across Queensland, but also other States, which proved useful in comparative analyses of Queensland's workforce context as compared to that in the rest of Australia. This report begins with the overall findings from the in-region workshop consultations and from the national tourism workforce survey, both of which highlighted the trends across the State and differences across the sectors; and followed by a summary across regions. It should be noted that this report is descriptive in nature, rather than involving any high-level analytics or critique, and aims to provide timely feedback to regions and State stakeholders on the main themes emerging from each workshop and the survey. It is designed as a stimulus for further dialogue, rather than as an endpoint, and we acknowledge that many of the valuable points that were made in the workshops, or captured in the survey, were not always able to be included in this report due to space issues but are being considered in further in-depth analysis.

OVERALL SUMMARY OF IN-REGION WORKSHOP CONSULTATION

Five regions in Queensland participated in the in-region Tourism Workforce Workshop Consultations from September to October 2022. In total, 55 tourism professionals, including employees, volunteers, operators, or stakeholders from different regions, contributed their insights to the development of the Queensland Tourism Workforce Strategy for crisis resilience and recovery (see Table 2). The average age of the workshop participants was 50 years old, and 67% of them were female. This cross-regional summary compares the differences and similarities between the five regions.

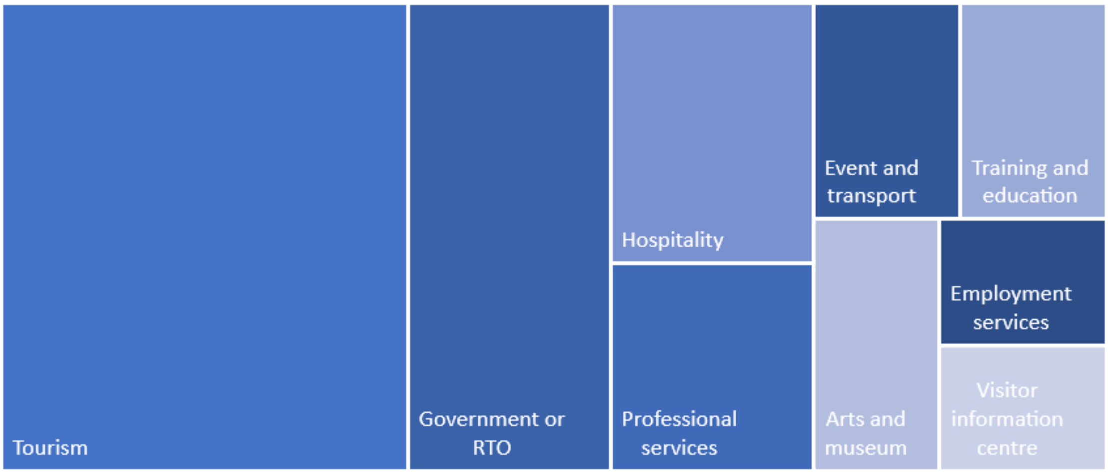


Table 2. Sample profile – sector

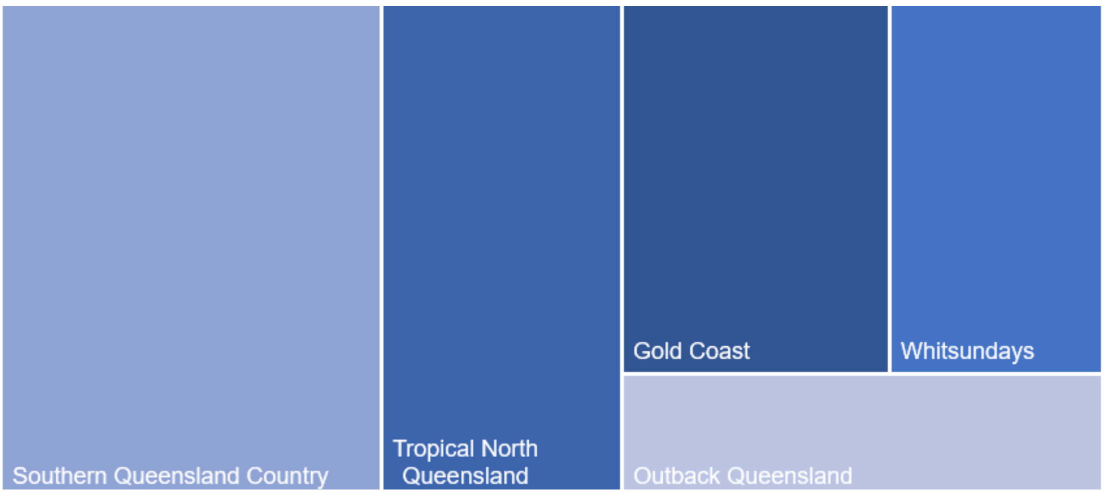


Table 3. Sample profile – region

Five regions in Queensland participated in the in-region Tourism Workforce Workshop Consultations from September to October 2022. In total, 55 tourism professionals, including employees, volunteers, operators, or stakeholders from different regions, contributed their insights to the development of the Queensland Tourism Workforce Strategy for crisis resilience and recovery (see Table 2). The average age of the workshop participants was 50 years old, and 67% of them were female. This cross-regional summary compares the differences and similarities between the five regions.

KEY CONSULTATION FINDINGS

Tourism workforce changes and structural issues

- Youth don't regard hospitality and tourism as a career, negative parental perceptions
- Demographic changes in many destinations result in smaller available workforces (e.g., disproportionally high number of residents are retirees)
- Surfeit of skill/job opportunities available but low enrolments, ghosting, quiet quitting and 'pay shopping' common practices
- Other sectors offering better conditions and security
- Tension between labour market demanding security, and employers, flexibility
- Issues with attracting other labour markets include visa processing times for international markets, ageism regarding seniors
- Micro, small and medium business lack (access to) resources, e.g., to retain and pathway employees or accessible mental health and wellbeing supports
- Housing affordability (and energy prices) significant barrier

'Great Resignation' in tourism

- (Poor) leadership a key factor in attrition
- Many workforce choices available
- Burnout and a renewed desire for work/lifestyle/family balance a driver of attrition, especially in regions
- Job insecurity highlighted during COVID-19
- Work from home not sustainable for most tourism roles
- Aggressive customers strain working conditions
- Inflation a driver of pay demands
- Multi-tasking not amenable to all tourism workers
- Young people leave chasing passions

Tourism workforce resilience

- Perception that after COVID-19, key business support (e.g., JobKeeper) disappeared
- Capacity of businesses to learn, be flexible and adapt were key to resilience, but require internal resources
- Managerial emotional intelligence asset to individual and organisational resilience, but undermined by many supervisors and managers being young
- Volunteers an under-utilised resource

Covid-related procedures and support impact on workers

- Perception employees most valued external support sources most (e.g., JobKeeper)
- Work/life balance and mental health and wellbeing key emerging focal areas
- Co-worker support, and fostering a collegial (family) organisational culture more valuable than individual resources
- Blanket governmental mandates re COVID-19 protocols not always relevant to regions (e.g., allowable local travel, vaccinations)
- Similarly, COVID-19 protocols created additional anxiety for workers and was a demotivator (intrinsically) (e.g., mask-wearing re job satisfaction and trust issues)
- On positive note COVID-19 has increased leadership empathy for workers

Government role in supporting tourism

- SMEs lack awareness of, and access to, resources
- Further support to develop infrastructure needed
- Urgency in 2032 Brisbane Olympics/Paralympics preparedness required
- State and Federal government loan/low interest rate initiatives for SMEs and more tax breaks
- Greater investment in traineeships (including school-based), accessibility and cutting administrative burden
- Develop resources to support succession planning initiatives
- Inconsistency in messaging between three levels of government a continued issue – adopt a whole-of-government approach
- Incentivise social enterprises
- Develop incentives to attract mature age (including self-funded pensioners)
- Additional supports needed to retain aged workers (e.g., counter ageism, dignify older workers)
- Dispense with electoral cycle policy and embrace a long-term generational policy framework


CAMP

OVERALL SUMMARY OF TOURISM WORKSHOP NATIONAL SURVEY

1. Demographics

The survey received 388 responses. After removing incomplete responses, a total of 340 valid responses were retained for analysis. The sample is broadly representative of the hospitality, tourism, and leisure workforces, with 68% of the sample being under 45 years of age, 70% being female, and 55% with a Diploma or above educational level.

Age	Count	%
18-25 years	64	18.8
26-35 years	80	23.5
36-45 years	58	17.1
46-55 years	63	18.5
56-65 years	41	12.1
Above 65 years	12	3.5
Prefer not to say	22	6.5

Table 4. Sample Profile – Age

Gender	Count	%
Male	98	30.6
Female	220	68.8
Prefer not to say	2	0.6

Table 5. Sample Profile – Gender

Educational Backgrounds	Count	%
High school junior or equivalent	16	5.0
High school senior or equivalent	87	27.1
Diploma/Trade qualification	99	30.8
Bachelor's degree or equivalent	79	24.6
Post-graduate degree or equivalent	31	9.7
Other	9	2.8

Table 6. Sample Profile – Educational Backgrounds

With regards to nationality, most participants (79.3%) identified as Australian (n=253). The rest were a myriad of nationalities, including British (n=17), New Zealander (n=6), and others. In terms of the current residential location of respondents, 33% are residing in Queensland, 26% in New South Wales and 20% in Victoria.

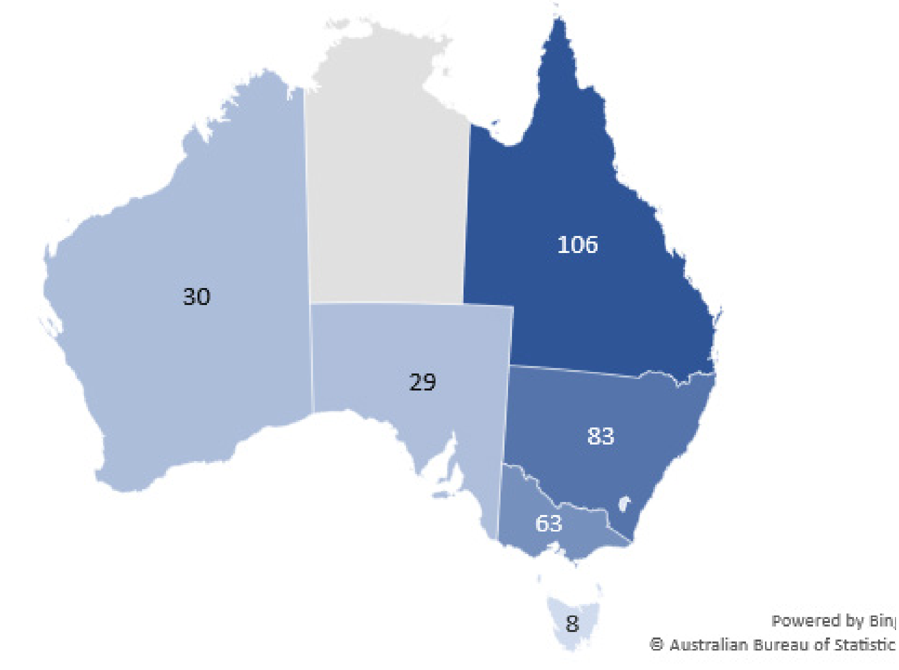


Figure 3. Sample Profile – Residential locations

Among the 106 respondents residing in Queensland, we followed up with a question regarding their specific region. Consistent with the population distribution, the regions that attracted the most responses are 41% from Brisbane (43%) and Gold Coast (14%).

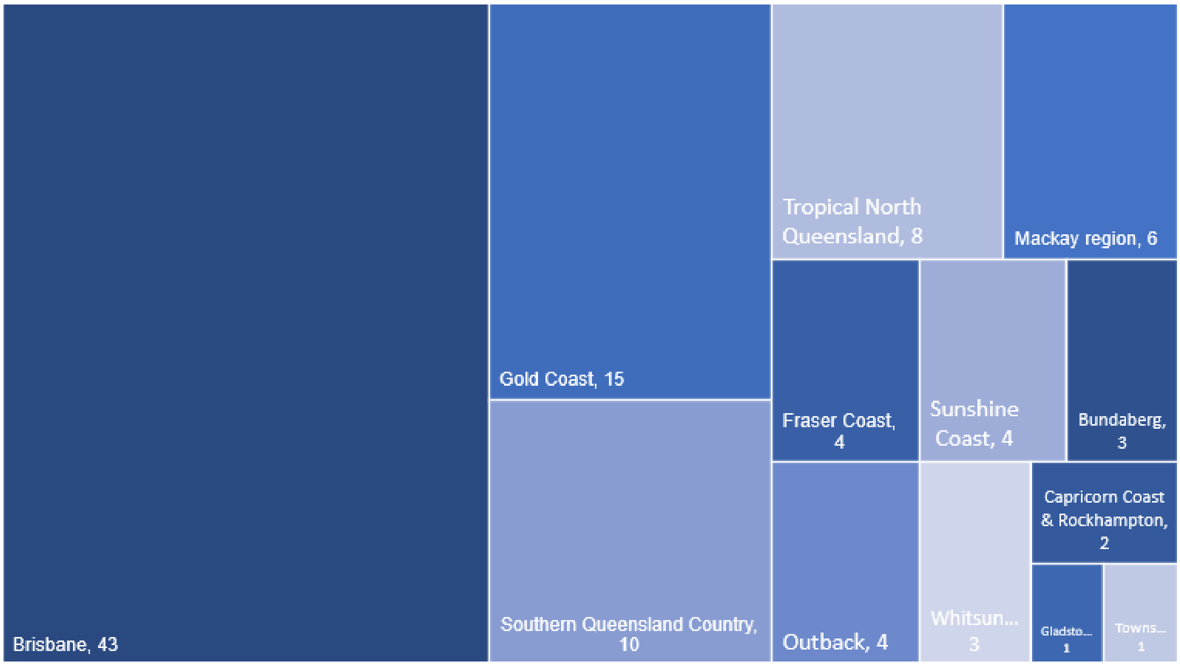


Figure 4. Sample Profile – Regions in QLD

2. Organisation characteristics

The survey included respondents from a wide range of sectors in tourism and hospitality, with the majority being food and drink service sector (e.g., restaurants, clubs, bars and café), followed by the accommodation sector.

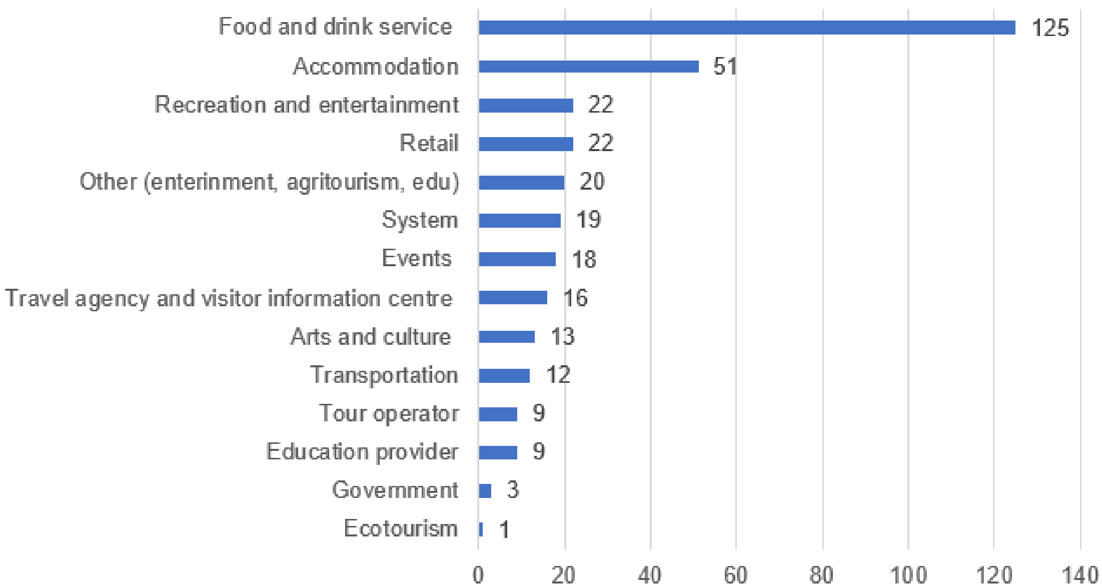


Figure 5. Sample Profile – Main activities of the organisation

Regarding the size of the organisations, the results show that the industry is dominated by small-medium-sized enterprises (SMEs), with 78% of respondents working at organisations with fewer than 200 employees (see Table 7). The crosstabulation analysis shows that except for transportation, most tourism/hospitality sector organisations are small businesses (i.e., education, retail, and tour operator), while the event sector is a mix of both small (39%) and large (44%) businesses (see Table 8).

Organisation Size	Count	%
Sole proprietorships and partnerships without employees	13	4.3
1-4 employees (i.e., micro businesses)	27	9.0
5-19 employees (i.e., small businesses)	89	29.7
20-199 employees (i.e., medium businesses)	105	35.0
> 200 employees (i.e., large businesses)	66	22

Table 7. Sample Profile – Organisation size

Regarding the operating years of the organisation, 40% of the sample indicated their organisations have been operating for more than 20 years (see Table 8).

Operating years	Count	%
less than one year	4	1.3
1-2 years	16	5.4
3-4 years	34	11.4
5-10 years	66	22.1
11 to 20 years	60	20.1
20 years or more	118	39.6

Table 8. Sample Profile – Organisation operating years

Regarding the primary source of visitors, most businesses (62%) are domestic market-focused, and 30% of businesses have an even split of international and domestic visitors (see Figure 6).

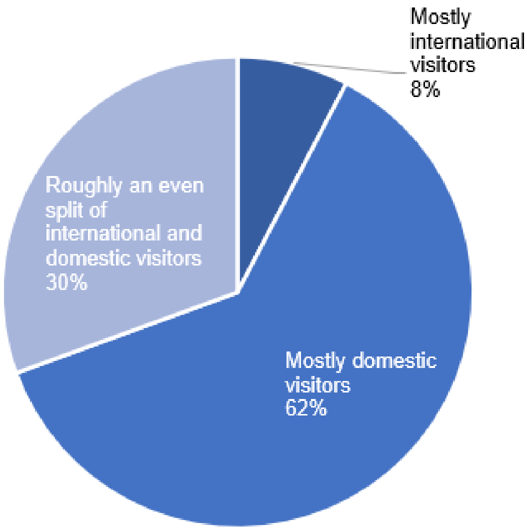


Figure 6. Sample Profile – Organisation target market

Around 45% of the sample indicated that their organisation is a member of a peak tourism/hospitality industry body, including Queensland Tourism Industry Council (QTIC), Australia Tourism Industry Council (ATIC), Restaurant & Catering Association (R&CA), Australia Tourism Export Council (ATEC), and Australia Federation of Travel Agents (AFTA) (See Figure 7).

Figure 7. Sample Profile – industry

3. Job characteristics

The study attracted respondents with substantial experiences working in the industry, with the average industry tenure being 11 years. The average time in their current organisation is 6 years.

Years in Tourism/hospitality	Count	%
Less than 3 years	84	24.7
Between 3 and up to 10 years	110	32.4
Between 10 and 20 years	75	22.1
More than 20 years	71	20.9

Table 9. Sample Profile – Years in tourism/hospitality and in current organisation

Years in the Current Organisation	Count	%
Less than 3 years	158	46.5
Between 3 and up to 10 years	113	33.2
Between 10 and 20 years	41	12.1
More than 20 years	28	8.2

Table 10. Sample Profile – Years at the current organisation

While nearly half the sample was employed full-time, over half was employed part-time, casually or under other contingent worker arrangements. The sample also included 5% of self-employed respondents, who identified as owner-operators.

Employment status	Count	%
Full-time	139	43.3
Part-time	80	24.9
Casual	80	24.9
Volunteer (Visitor Information Centre)	1	0.3
Unemployed / not looking for work	2	0.6
Self-employed (i.e., Owner operator)	17	5.3
Other	2	0.6

Table 11. Sample Profile – Employment status

Regarding job status, we also asked respondents to indicate the total of tourism/hospitality jobs they have had since February 2020. Nearly 30% of the sample have had more than one tourism/hospitality job since COVID-19 began (see Figure 8).

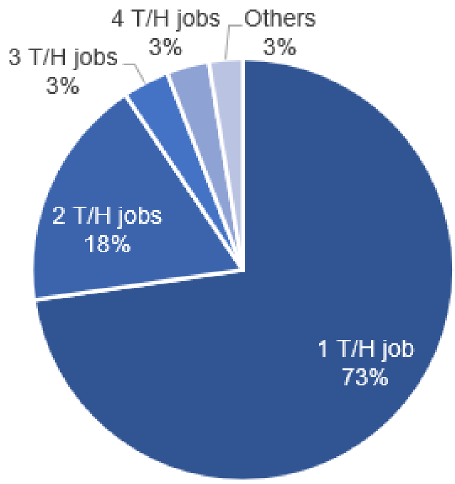


Figure 8. Sample profile – number of tourism/hospitality jobs since February 2020

Notes: 'others' are responses of "prefer not to disclose

With regards to weekly working hours, the average weekly working hours of the sample is 30 hours. Over half of respondents worked between 21-40 hours per week, while over 10% worked longer hours (41-60 hours per week).

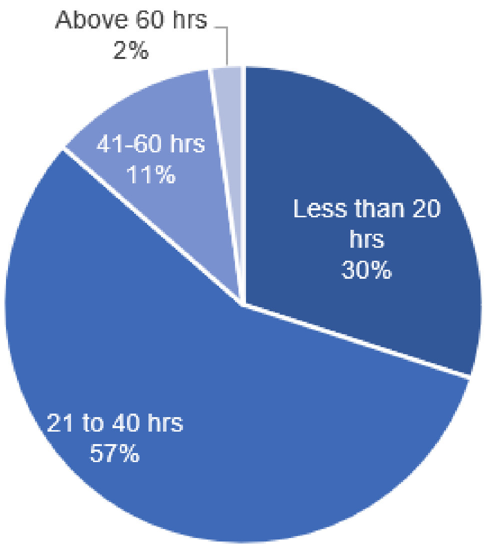


Figure 9. Sample profile – Working hours

An open-ended question asked respondents to indicate their job role and sector, and this is represented in the word cloud below. The majority of respondents were managers or assistant managers; the next common job roles were bar or room attendant and chef.

Figure 10. Sample Profile – Job roles


BARTENDER
AGAVE SYRUP

CRISIS-RELATED SUPPORT RESOURCES

During COVID-19, governments and industry associations introduced several crisis-support resources. Our in-region consultation workshops also identified access to crisis-support resources as a major concern. In our study, we were deeply interested in tourism professionals' insights on industry access to, use of, attitudes and experiences with these crisis-support resources. 50% reported that their businesses or themselves have access to at least one COVID-related crisis support, such as JobKeeper, JobSeeker, and COVID isolation payments (see Figure 11).

Figure 11. COVID-related crisis support resources

1. Specific features of crisis-related support

To investigate the effectiveness of crisis-related support, we started by asking respondents to reflect on five specific features in relation to the support, including the credibility and accessibility of the information of the support, the feasibility of the timeframe and the monetary amount of the financial support, and the relevance of the content. Overall, the results indicate a relatively high level of satisfaction with these features, but the information accessibility and timeliness, and the monetary amount of the support can be improved, as nearly 40% of respondents indicate their concerns about these areas (see Figure 12).

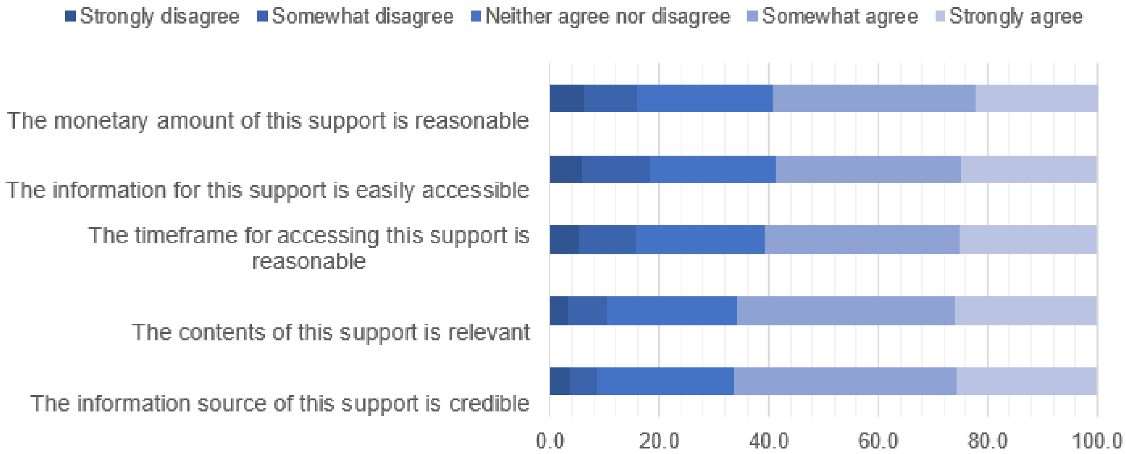


Figure 12. Assessment of the specific features of crisis support

2. Perceived ease of use of crisis-related support

To further investigate tourism professionals' attitudes toward crisis-related support, we draw on the Technology Acceptance Model (TAM, Davis, 1989) and focus on the perceived ease of use and perceived usefulness of the support. According to this theory, an individual's intention to engage in certain behaviours (e.g., to use or not use support) is jointly shaped by two important forces: perceived usefulness, perceived ease of use. With regards to the perceived ease of use, defined as "the extent to which an individual believes that using a particular system is free of effort", we asked respondents to reflect on the readability of the support material/website, including its requirements and procedures. Half of the respondents find the crisis-support to be easy to use (56%), and easy to get the support to work as expected (54%).

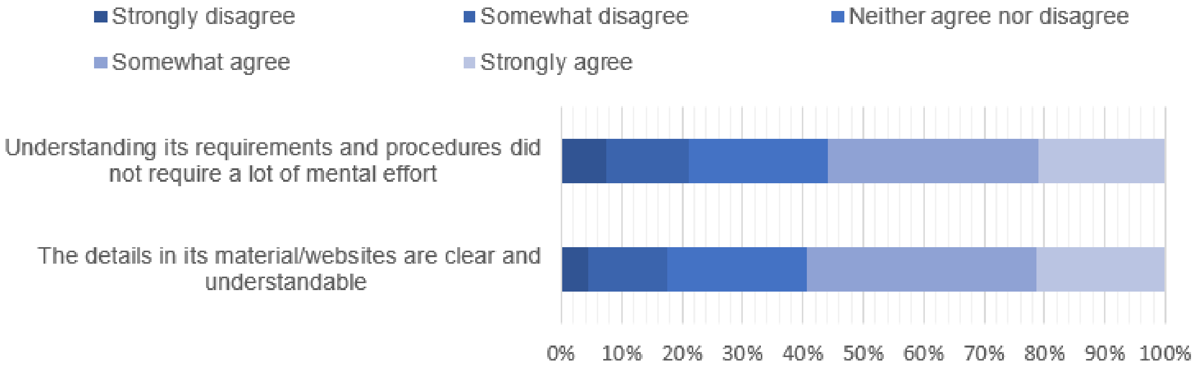


Figure 13. Perceived ease of crisis support

3. Perceived usefulness of crisis-related support

Perceived usefulness refers to the extent to which an individual believes that using a particular system would improve work performance. In our study, we asked respondents' perceived usefulness of the crisis support in terms of improving their work resilience, effectiveness, decision-making, as well as performance in general (see Table 12). The results show a splitting of responses between neither agree nor disagree and somewhat agree (Mean = 3.43, SD = .95). There is less than 25% of respondents find crisis support very useful.

COVID-related crisis support **(n =340)**	**Strongly disagree**	**Somewhat disagree**	**Neither agree nor disagree**	**Somewhat agree**	**Strongly agree**
Improved my ability to cope with crises at work	4.8	7.2	28.4	**34.9**	24.8
Increased my resilience at work	5.1	13.7	29	**33.4**	18.8
Enhanced my effectiveness at work	6.9	13.1	**35.2**	30.7	14.0
Helped my work in general	6	14.3	29.6	33.7	16.4
Facilitated my decision-making at work	7.2	13.4	**37**	29	13.4

Table 12 Perceived usefulness of COVID-related crisis support

When asked to provide reasons for why they found the support useful, respondents mentioned it helped stimulate the economy, maintain their business, stay informed, and keep staff safe. Figure 14 reflects their responses. In comparison, when asked why they find the support is not useful, respondents mentioned that it is too complex to apply, too long to wait to get payments, or not qualify or eligible for the payments (Figure 15).

Figure 14. Why useful

Figure 15. Why not useful

4. Organisational support for resource access

In this study, we also consider how external factors, such as organisational support, influence individuals' intention to use crisis support via the proposed perceived usefulness and perceived ease of use pathways. In particular, we asked three questions regarding whether respondents have received or were able to get help from their organisation for accessing and using crisis support. The results show that over half sample (57%) have received limited support from the organisation.

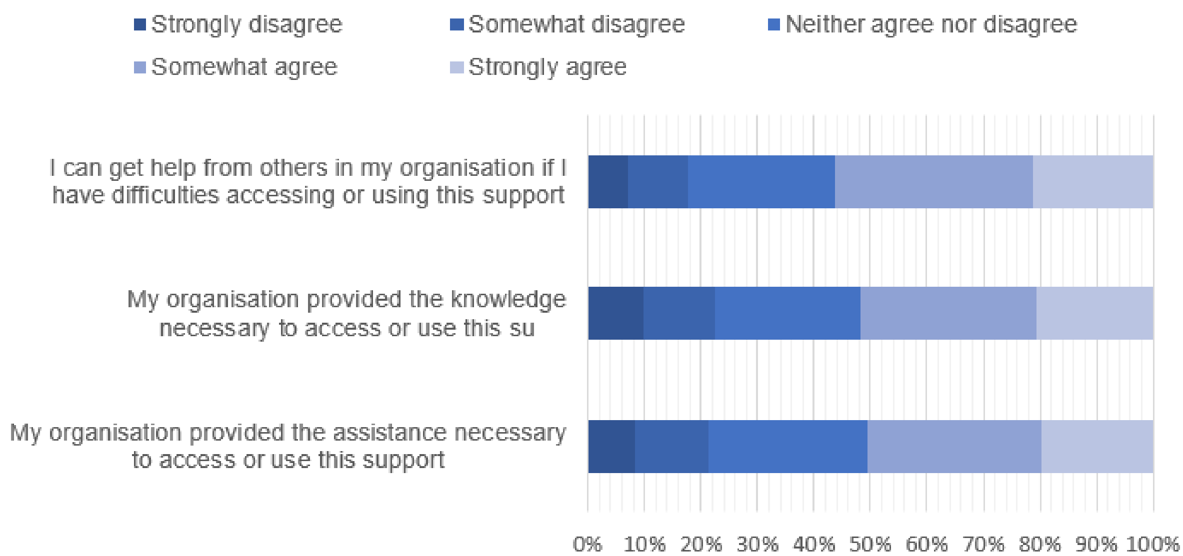


Figure 16. Organisational support in accessing

5. Overall attitudes toward crisis-related support

Respondents' overall attitudes toward crisis support are positive, as they find most supports are worthwhile, beneficial, desirable, and necessary (see Figure 17). In terms of their intention to access similar crisis-support resources in the future, over half the sample stated that they will try to or plan to use them if necessary. Moreover, we asked respondents to indicate whose opinion is most important to their decision-making (e.g., use the support or not use the support) in the future, with 48% choosing family, followed by supervisor (24%) (see Figure 18).

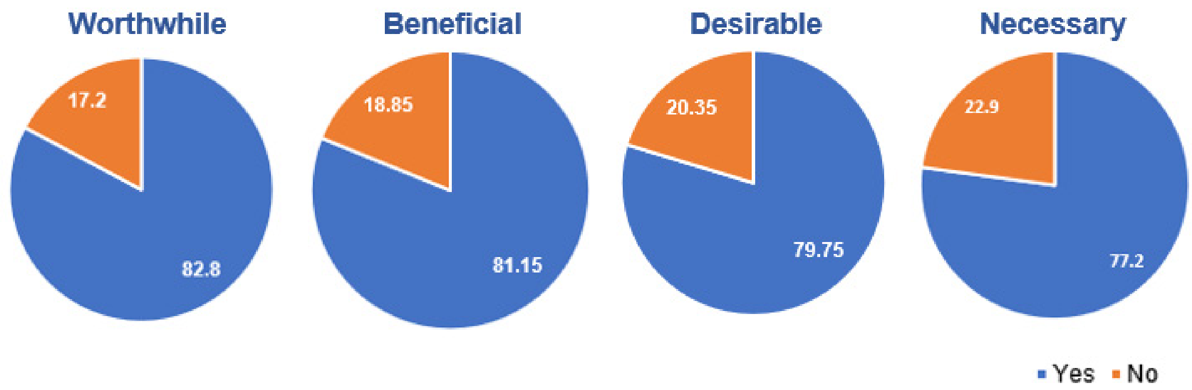


Figure 17 Overall attitudes toward support

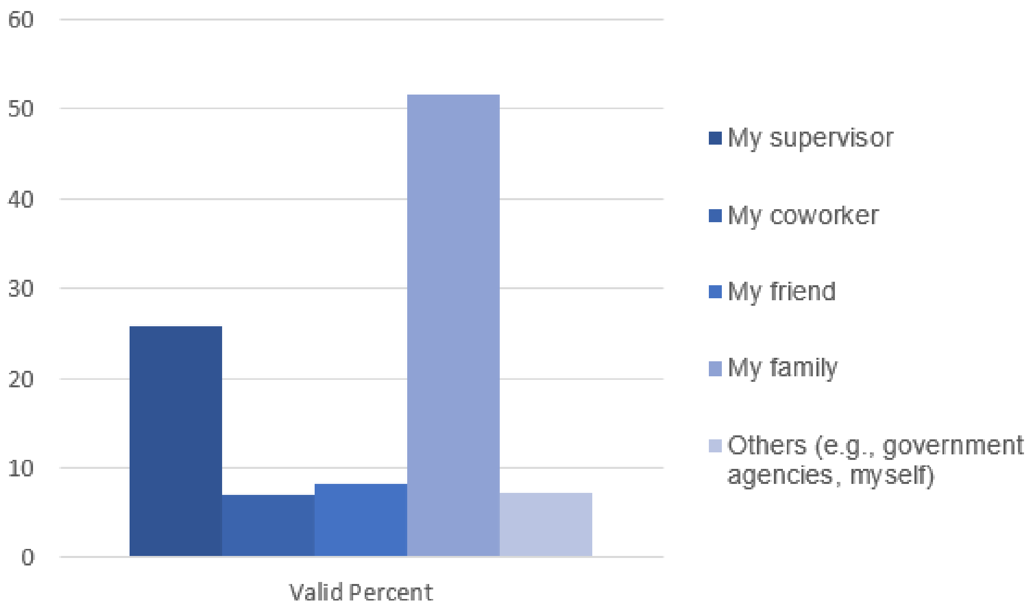


Figure 18 Source of decision-making

6. Conceptual model of the intention to use crisis-related support resources

In this part, we empirically test the proposed predictors of individuals' intention to use crisis-related support resources in the future. On the basis of TAM model, it is proposed that individuals' intention to use crisis-related support resources in the future is influenced by their overall attitudes. Thus, when favourable attitudes (i.e., assessing the use of support is worthwhile, beneficial, desirable, and necessary) are formed, individuals are more likely to seek and use the resources in the future. Furthermore, such favourable attitudes can be predicated by two key proximal cognitive factors: the perceived usefulness, and perceived ease of use and two more distal factors (i.e., features of the crisis support and organisational support for resources access). These two distal factors will independently and interactively influence individuals' intention to use resources via the proposed cognitive factors. Findings from the regression analyses show that (see Figure 19):

- The specific features of a resource (i.e., the information source is credible and accessible, the contents are relevant, the timeframe and the monetary amount is reasonable) have a strong positive effect on individuals' perceived ease of use.
- The specific feature of a resource has a moderately positive effect on individuals' perceived usefulness.
- Organisational support for resource access is positively related to individuals' perceived usefulness.
- Organisational support for resource access is positively related to individuals' perceived ease of use.
- Organisational support for resource access can further enhance the positive effect of the resource features on perceived usefulness.
- Perceived usefulness is positively related to a favourable attitude toward the resource.
- Perceived ease of use is positively related to a favourable attitude toward the resource.
- A favourable attitude has a strong positive relationship with individuals' intention to use crisis related support resources in the future.

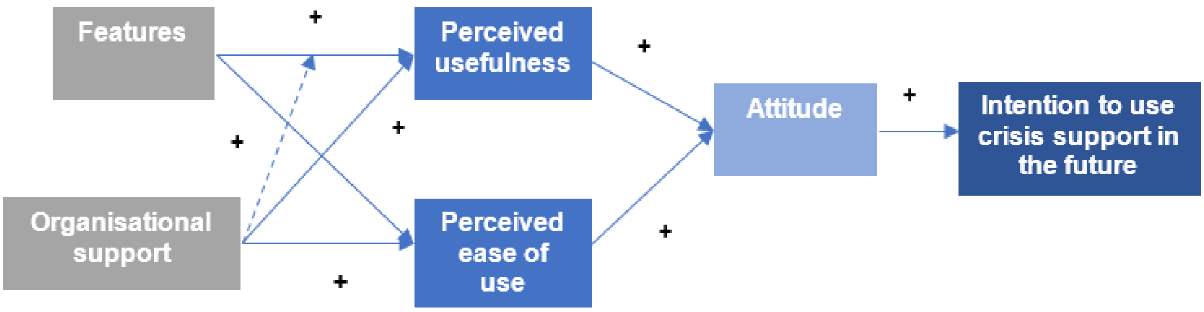


Figure 19. Model of Tourism workforce intention to use crisis-related support resources

In summary, the results from regression analysis suggest that 1) the specific features of the resource (e.g., information source, timeframe) can shape individuals’ perception regarding the usefulness and ease of use of the resource, 2) organisational support can facilitate the access and use of the resource, 3) organisational support can also strengthen the positive effect of specific resource features on perceived usefulness, 4) perceived usefulness and ease of use will contribute to a favourable attitude toward the resource, and 5) such attitude toward the resource plays a critical role in their future resource access and use behaviour.


Quiksilver

COMPARATIVE ANALYSIS OF EMPLOYEE & ORGANISATIONAL RESILIENCE BETWEEN 2021 AND 2022

1. Employee resilience and contributing factors: comparison between 2021 and 2022

We performed a series of comparative analyses with the survey responses collected at two different time points. During the time 1 data collection (September to October 2021), most surveyed regions had COVID-19 travel (e.g., border control) and safety restrictions (e.g., isolation and mask-wearing) in place. In comparison, during time 2 data collection (October to November 2022), most travel and safety restrictions are removed.

A comparative analysis across two time period with regards to employee resilience, defined as actions employees choose to take to deal with work-related challenges in a crisis context (Braun et al., 2019), suggest that employees' self-report resilience has a slight improvement from 2021 to 2022 (see Figure 20). A further investigation of the specific areas for improvement shows that employees reported a higher level in their capacity to manage a high workload, improve ways of doing work, respond to feedback, and use change at work as an opportunity for growth (see Figure 21). For cross-state comparison, tourism workers in Queensland experience a higher level of resilience (see Figure 22).

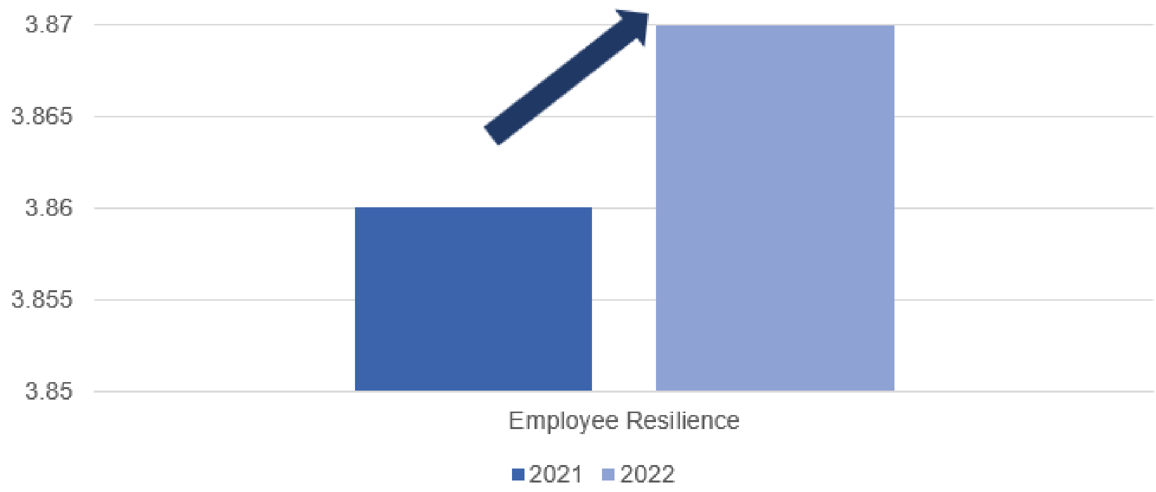


Figure 20. Overall employee resilience: 2021 vs 2022

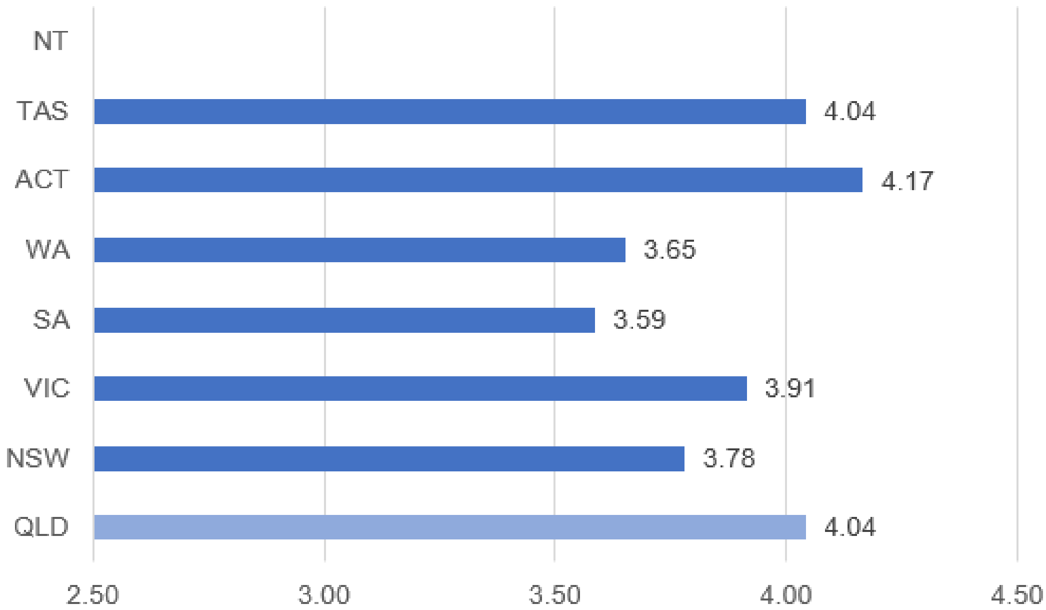


Figure 21. Employee resilience State Comparison

Notes: There is no survey responses from NT.

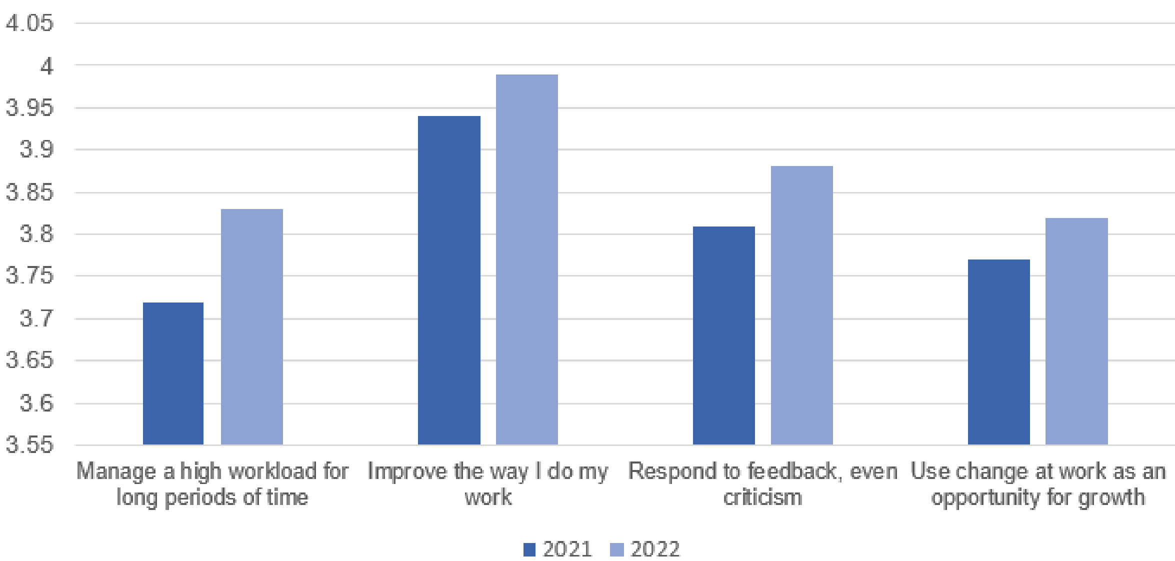


Figure 22. Specific items of employee resilience: 2021 vs 2022

According to our research findings from the 2021 survey, at the micro-level psychological empowerment has been identified as an important factor contributing to employee resilience. Psychological empowerment is the manifestation of internal motivation with respect to four dimensions: sense of meaning, self-efficacy, autonomy, and sense of impact (Spreitzer, 1995) . By comparing employees' experience of overall empowerment, as well as four specific dimensions, it shows that in 2022, employees experience a higher level of empowerment across all four dimensions (see Figure 23). Such positive change in empowerment is likely to contribute to an increase in employee resilience.

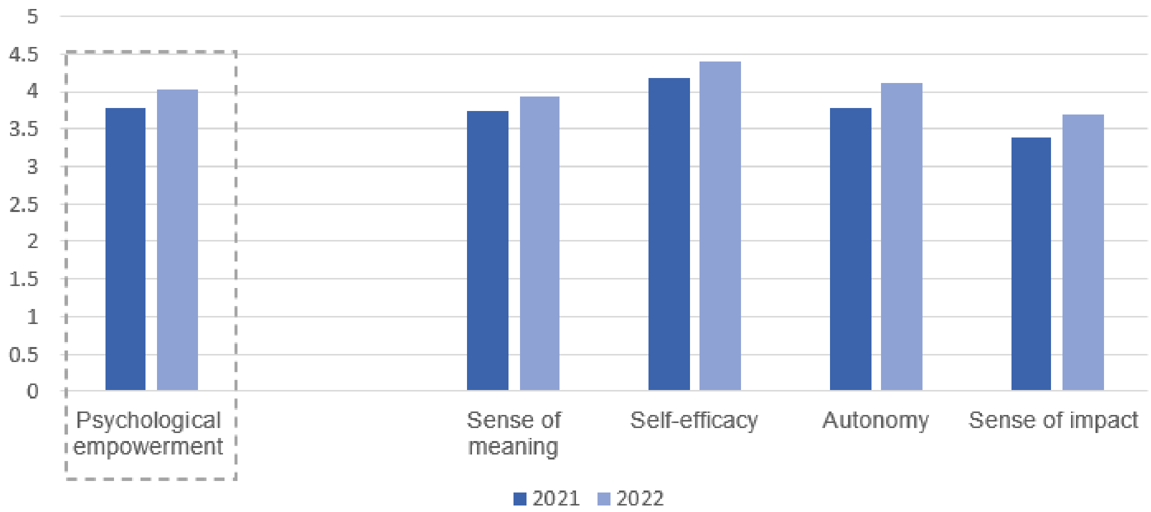


Figure 23. Employee psychological empowerment: 2021 vs 2022

At the meso-level, another contributing factor to employee resilience identified in 2021 survey was organisational learning culture, defined as an organisation's ability to create learning opportunities and encourage team learning and idea-sharing. The comparative analysis of organisational learning culture between 2021 and 2022 also indicates an evident increase in employees' perceived organisational learning culture (see Figure 24). This finding provides another possible explanation to the change in employee resilience.

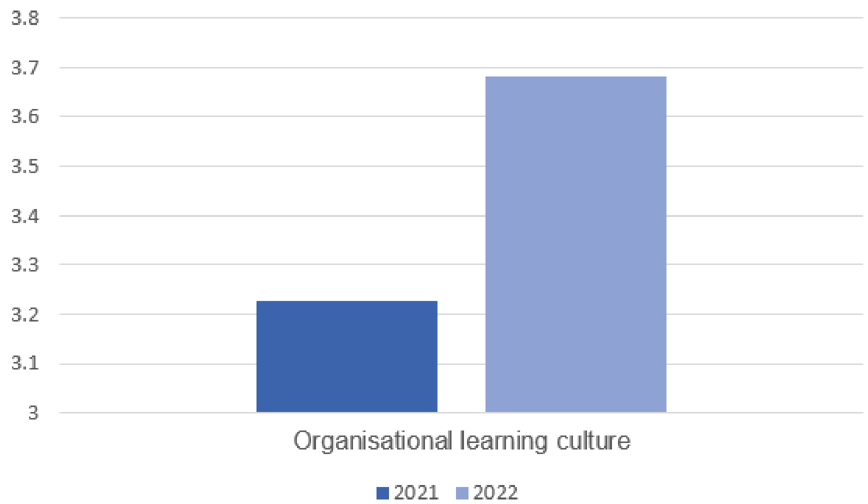


Figure 24. Organisational learning culture: 2021 vs 2022

2. Employee wellbeing between 2021 and 2022

In addition to employee resilience, our study examined employee wellbeing, as it emerged as a significant issue during COVID-19. To capture wellbeing we administered an abbreviated Depression, Anxiety and Stress Survey (DASS), which is commonly used by General Practitioners in local practice (see Figure 25). From 2021 to 2022, employee wellbeing has improved, evidenced by a decline in depression, anxiety and stress levels (see Figure 26). In terms of cross-state comparison, tourism workers in Queensland have a relatively high level of wellbeing (see Figure 27).

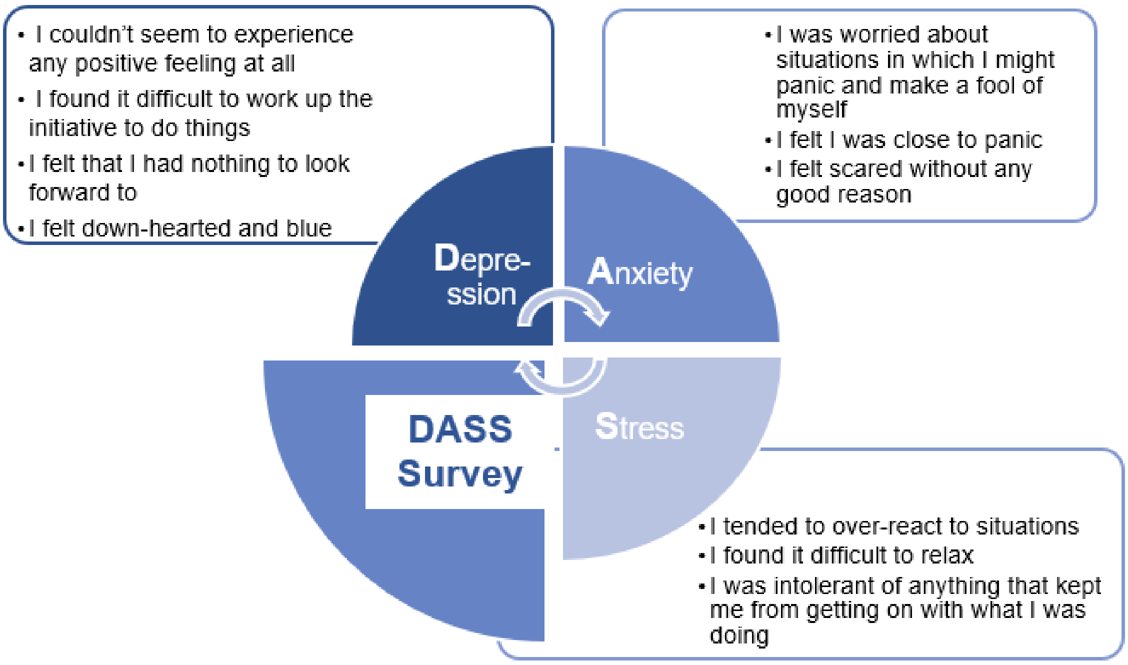


Figure 25. DASS dimensions and items

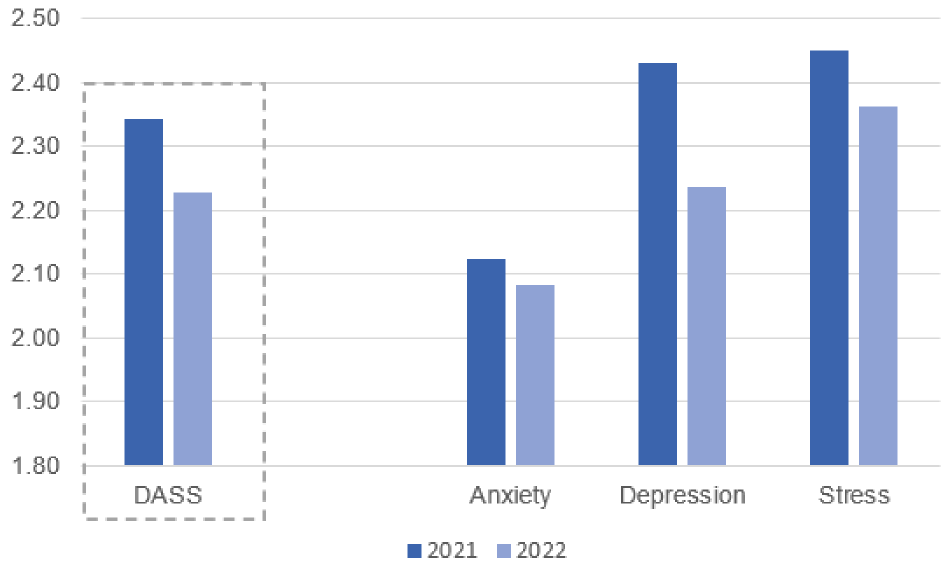


Figure 26. Employee wellbeing-DASS: 2021 vs 2022

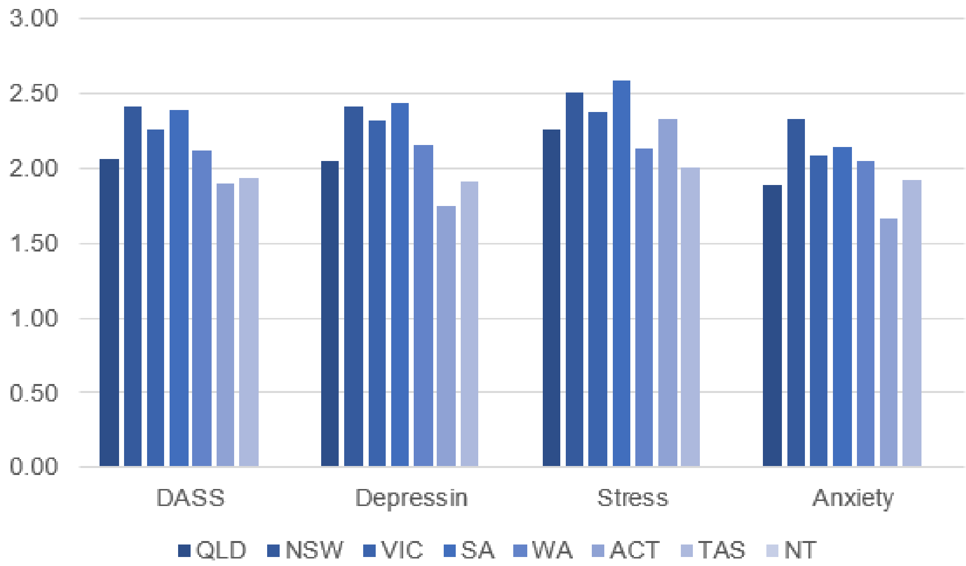


Figure 27. Employee wellbeing State comparison

Notes: There is no survey responses from NT.

3. Organisational resilience between 2021 and 2022

With regard to organisational resilience, consistent with the improvement in employee resilience, there is a positive change in organisational resilience from 2021 to 2022, as well as in two predictors of organisational resilience (i.e., organisational change and organisational strategy)(see Figure 28). For cross-state comparison, Queensland has the highest level of organisational resilience (see Figure 29).

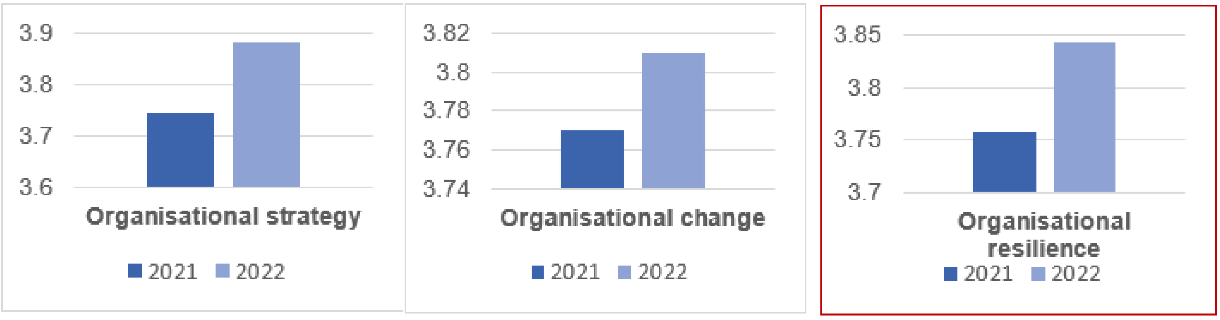


Figure 28. Organisational resilience and its predicators: 2021 vs 2022

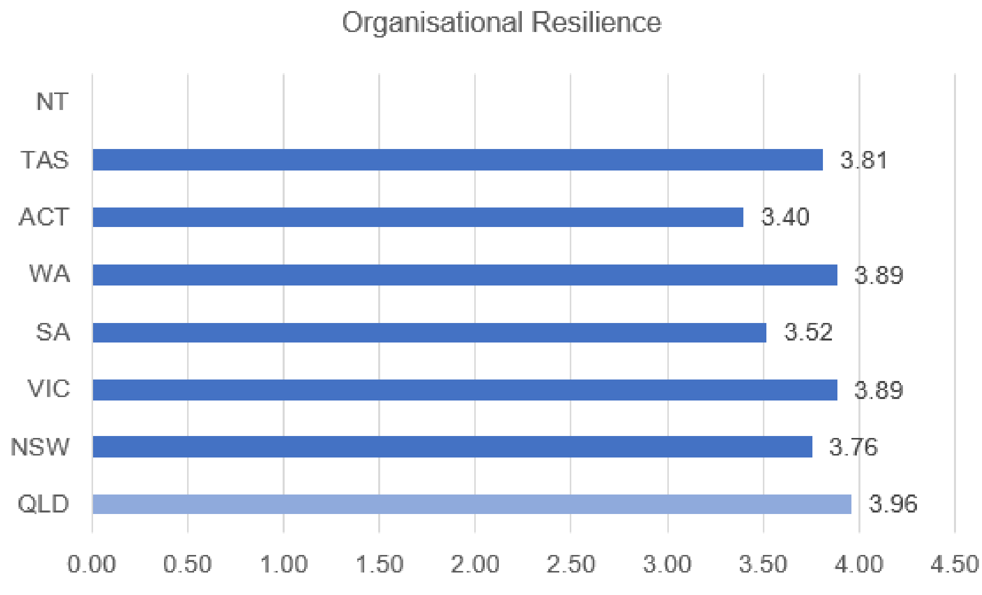


Figure 29. Organisational resilience State comparison

Notes: There is no survey responses from NT.

SECTOR COMPARATIVE ANALYSIS

Another key focus of this project was to investigate the resilience of three specific tourism sectors, accommodation, food service and tourism service. As of 2021, the survey captured data from many tourism sectors and so allowed for rich inter-sector comparisons (see Figure 30). Nonetheless, in total, the survey received 77% of its responses from these three sectors.

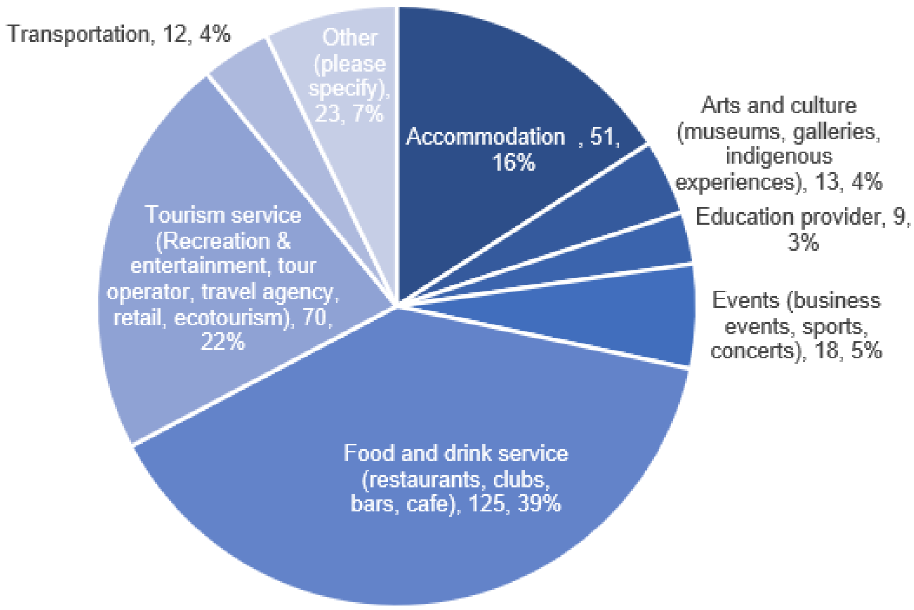


Figure 30. Industry/Sector Summary (n, %)

1. Descriptive overview of three sectors

To better understand the sector characteristics, we explored gender, age, and education background distributions (see Table 13). The key observations are:

- The food and drink service sector was characterised by relatively younger workers, while accommodation has the highest cohort in the 46-55 age group, which are likely mature supervisors/managers.
- Women heavily dominated all three sectors.
- Tourism service sector workers have a relatively higher level of education, with more than one third of them holding a bachelor's degree or equivalent.

	Accommodation N=51	Food and drink service N=125	Tourism service N=70	Total N=246
Age group				
18-25 years	10.2%	28.0%	21.4%	22.5%
26-35 years	24.5%	28.0%	25.7%	26.6%
36-45 years	18.4%	14.4%	22.9%	17.6%
46-55 years	32.7%	16.0%	14.3%	18.9%
56-65 years	10.2%	10.4%	14.3%	11.5%
Above 65 years	4.1%	3.2%	1.4%	2.9%
Gender				
Male	25.5%	30.4%	29.0%	29.0%
Female	70.6%	69.6%	71.0%	70.2%
Education				
High school junior or equivalent	7.8%	4.8%	4.3%	5.3%
High school senior or equivalent	25.5%	35.2%	21.4%	29.3%
Diploma/Trade qualification	27.5%	33.6%	20.0%	28.5%
Bachelor's degree or equivalent	19.6%	19.2%	37.1%	24.4%
Post-graduate degree or equivalent	9.8%	6.4%	17.1%	10.2%
Other	9.8%	0.8%	-	2.4%

Table 13. Socio-demographic profile across sectors

	Accommodation N=51	Food and drink service N=125	Tourism service N=70	Total N=246
Years in tourism/hospitality industry				
Less than 3 years	21.6%	15.2%	27.1%	19.9%
Between 3 and up to 10 years	31.4%	43.2%	25.7%	35.8%
Between 10 and 20 years	21.6%	23.2%	22.9%	22.8%
More than 20 years	25.5%	18.4%	24.3%	21.5%
Years at the current organisation				
Less than 3 years	43.1%	47.2%	41.4%	44.7%
Between 3 and up to 10 years	37.3%	38.4%	30.0%	35.8%
Between 10 and 20 years	13.7%	9.6%	15.7%	12.2%
More than 20 years	5.9%	4.8%	12.9%	7.3%
Employment status				
Full-time	52.9%	32.0%	50.0%	41.5%
Part-time	25.5%	31.2%	21.4%	27.2%
Casual	13.7%	33.6%	20.0%	25.6%
Volunteer	-	0.8%	-	0.4%
Unemployed	-	-	2.9%	0.8%
Self-employed	7.8%	2.4%	5.7%	4.5%
Work Hours (weekly)				
Less than 20 hrs	23.5%	32.3%	23.5%	28.0%
21 to 40 hrs	51.0%	56.5%	69.1%	58.8%
41-60 hrs	19.6%	10.5%	4.4%	10.7%
Above 60 hrs	5.9%	0.8%	2.9%	2.5%

Table 14. Job characteristics profile across sectors

	Accommodation N=51	Food and drink service N=125	Tourism service N=70	Total N=246
Organisation operating years				
1-2 years	0.0%	1.8%	1.5%	1.3%
3-4 years	6.8%	5.3%	9.0%	6.7%
5-10 years	4.5%	15.0%	7.5%	10.7%
11 to 20 years	20.5%	31.0%	14.9%	24.1%
20 years or more	27.3%	19.5%	23.9%	22.3%
Organisation size	**40.9%**	**27.4%**	**43.3%**	**34.8%**
Sole proprietorships & partnerships	8.3%	0.9%	4.7%	3.5%
1 to 4	10.4%	10.3%	6.3%	9.2%
5 to 19	20.8%	37.9%	29.7%	32.0%
20 to 199	35.4%	39.7%	39.1%	38.6%
> 200	25.0%	11.2%	20.3%	16.7%

Table 15. Organisation characteristics profile across sectors

2. Employee and organisational resilience

A sector comparative analysis regarding employee resilience and organisational resilience (see Figure 31) showed:

- Employee resilience in tourism service (Mean = 3.83) and food and drink (Mean = 3.87) service sectors is significantly lower than employee resilience in the accommodation sector.
- Organisational resilience in the accommodation sectors (Mean = 3.93) was also significantly higher than tourism service sector (Mean = 3.77) and food and drink service sector (Mean = 3. 74).

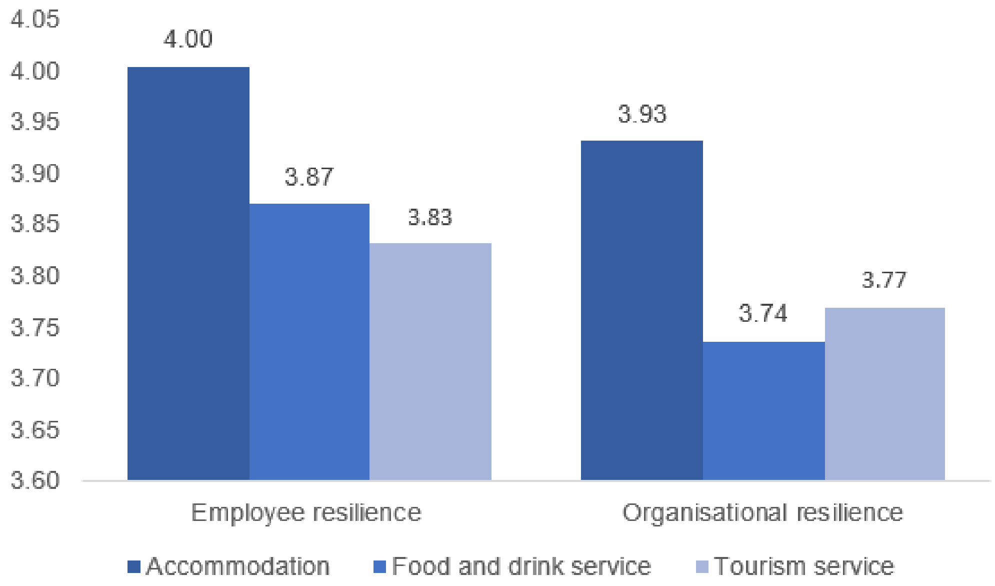


Figure 31. Employee and organisational resilience across sectors

3. Employee wellbeing

The comparative analysis of employee wellbeing showed that employees in the tourism service sector experienced more distress, anxiety, and stress.

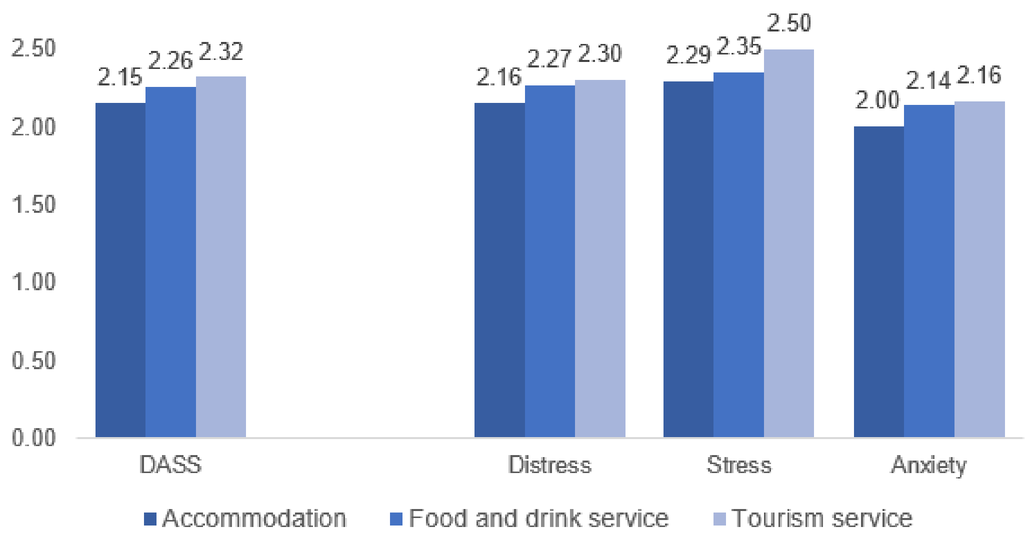


Figure 32. Employee wellbeing across sectors

2022 TOURISM WORKFORCE WORKSHOP CONSULTATION SUMMARY NOTES

GOLD COAST REGION

On the 7th of September 2022, 10 tourism employees, operators and stakeholders from the Gold Coast region participated in a Tourism Workforce Workshop Consultation as part of the Advance Queensland funded "Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan" Project. This Summary Note shares a synopsis of discussions in relation to the above-mentioned seven key questions.

KEY FINDING #1 Tourism workforce changes and structural issues

- Not many changes. COVID-19 just amplified the existing issues
- More external pressures like the cost of living, housing affordability and rental
- Moving from redundancies and lack of work phase to lack of workers and burnout phase
- Lack of international students and holiday working visa labour market
- Youth market:
  - People don't view tourism and hospitality as a rewarding and exciting career path -> need training, school or college and university education, to 'excite' young people and told them tourism jobs could be a career
  - Parents' negative perceptions toward the industry influences young people's career choices
  - They have more options/passions to follow
- Industry image and positioning /brand management
- Growing investment in skill/job training programs versus decreasing enrolment in these programs
- Pay expectations at the apprenticeship, "Pay shopping".

KEY FINDING #2 Tourism workforce resilience

- At the micro-level, emotional intelligence is incredibly important for line managers, who range from the young to mature and more experienced.
- Leaders should have skills to allow the team to feel seen and heard
- Need a mature workforce with the time, energy, and skills
- A large amount of the supervisors in the tourism business are relatively young (i.e, the 20s). They lack the capacity to coach or mentor senior workers.
- Resilience is infinite, with long-term implications (Cumulative crises)
- Organisation's resilience is tightly linked to the resilience of individuals
- How to balance the tension between bottoms lines and resources is challenging for tourism organisations
- Building a learning culture can be a cost to business
- Volunteers are under-utilised, given their potential to contribute to the tourism workforce. Their maturity, education levels, richness of experiences, willingness to give their time, and high-level psychological wellbeing are significant assets in times of crisis
- Volunteers/mature-age workers who are happy to give their time and who have much are under-utilised

KEY FINDING #3 Covid-relate procedures and support impact on workers

- Self-generated social or financial support was least valued by employees
- Employees value external sources more

KEY FINDING #4 'Great Resignation' in tourism

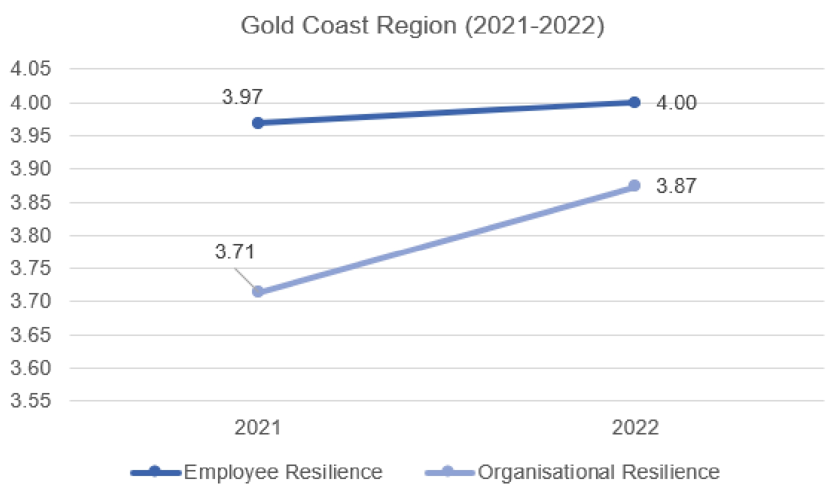
- Recognition of the tough position faced by owner-operators
- Leadership is an important factor that influences turnover
- Tourism cannot compete on pay but should focus on culturally what it can offer to potential employees
- Need to think out of the box and be more adaptive
- Lack of flexibility within the supply chain
- People are in silos and can't reinvent
- A lot of tourism workers have gone to Online platforms, where people choose their shifts
- Tourism industry brand need to be revitalised
- The language being used when talking about hospitality tends to be a negative connotation; people don't advocate for the industry
- Many other workforce choices available
- Limited pool of people: Competition from other industry sectors (e.g., aged care, manufacturing)
- Tourism is not perceived to be an exciting career
- Young leader program: People have a fixed perception of how tourism works (e.g., someone working in a restaurant or hotel to greet others). But, in fact, tourism is a unique industry where people with diverse roles and skills (accounting, graphic design, marketing, HR) can work in tourism
- School education and parents' influence

KEY FINDING #5 Government's role in supporting tourism

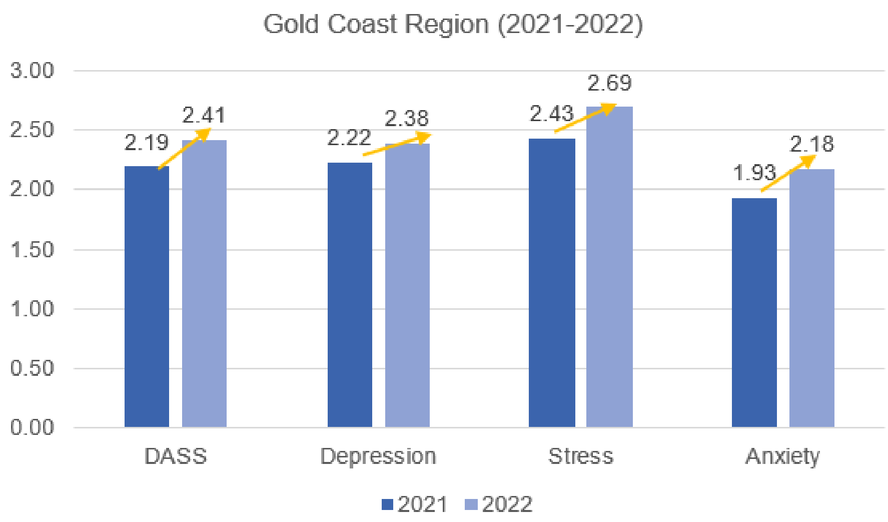
- Cash flow support: Tax cuts on small businesses, payroll, tax cuts
- Incentives that businesses can offer learning and development to people without impacting the bottom line
- Supports/funding on mature age programs: attracting mature-aged workers to hospitality and tourism (Baby boomers constitute a massive cohort
- Education about ageism
- Supports/funding towards cultural training
- Treated with dignity, mature aged workers
- Programs to engage young people (allow young people with tourism industry experience teach buddy up with other young people)
- Customised training: Training programs/policies are not tailored to the hospitality/tourism industry

KEY FINDING #6 Survey regional highlights

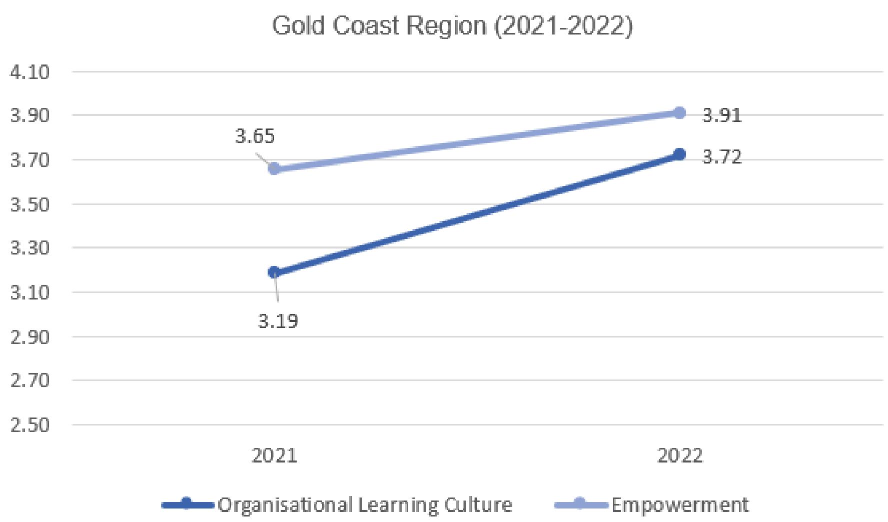
- From 2021 to 2022, employee resilience and organisational resilience in the Gold Coast region showed a slight increase.



- From 2021 to 2022, employee wellbeing declined, evidenced by a significant increase in all three dimensions of the depression, anxiety and stress scale (DASS), especially for anxiety



- On a positive note, from 2021 to 2022, at the meso-level, tourism workers perceived a significant improvement in organisational learning culture (Mean = 3.72 for 2022, Mean = 3.18 for 2021); and at the micro-level, they feel more empowered (Mean = 3.91 for 2022, Mean = 3.65 for 2021).



TROPICAL NORTH QUEENSLAND REGION

On the 14th of September 2022, 12 tourism employees, operators and stakeholders from the Tropical North Queensland region participated in a Tourism Workforce Workshop Consultation, as part of the Advance Queensland funded "Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan" Project. This Summary Note shares a synopsis of discussions in relation to the above-mentioned seven key questions.

KEY FINDING #1 Tourism workforce changes and structural issues

- Paradox faced by small businesses: employees demand higher salaries, shorter hours, and flexible work arrangements versus cashflow issues of employers, resulting in serious understaffed issue
- Barriers for people entering the tourism and hospitality industry: Seasonality issue - people moving into industries that were better suited to full-time or part-time employment
- The housing shortage, putting extra pressure on employers; and the housing issue is not attributable to a single reason, but a number of compounding factors (e.g., increasing divorce rates, younger people living in their own properties)
- Technological disruptors: Airbnb's long-term impact on the rental market. On the other hand, for Airbnb business owners, the costs have skyrocketed -> Australia lags in terms of regulating the platform economy
- Taxation issue: people who take a second job get charged a higher tax rate.
- International workers: delays in visa processing
- Industry image: e.g., a government job versus a job in hospitality
- Difficulties in enticing students to enter the tourism industry: no clear pathway, and work conditions are not desirable
- Sector differences: between small business and large business. Large businesses are more likely to provide the opportunity for structured careers
- Some government support programs address the immediate shortage, not focusing on the long term development of careers

2 We added Townsville as a neighbouring region to enhance the meaningfulness of the survey data

KEY FINDING #2 Tourism workforce resilience

- Macro-level factors: Cross-sector competition for resources
- Ageism issue (i.e., discrimination against aged people): Less motivated to employ seniors (age above 50) as the wage subsidies targeted more towards employing youth -> better marketing campaigns to create awareness among small businesses owners of the wage subsidies that are available to employ seniors

KEY FINDING #3 Covid-related procedures and support impact on workers

- From an HR perspective: be more mindful of the health and wellbeing of employees
- Shift from a self-resilient focus to providing more workplace resources to employees
- Teamwork and support from co-workers represents a potential strength in the industry, especially for family businesses; it is crucial to keep staff involved in creating a family-like atmosphere, and a team approach helps retain and build the resilience of an employer
- Solution: To keep staff and build resilience, employers can create an environment that promotes teamwork and achieving a common goal

KEY FINDING #4 'Great Resignation' in tourism

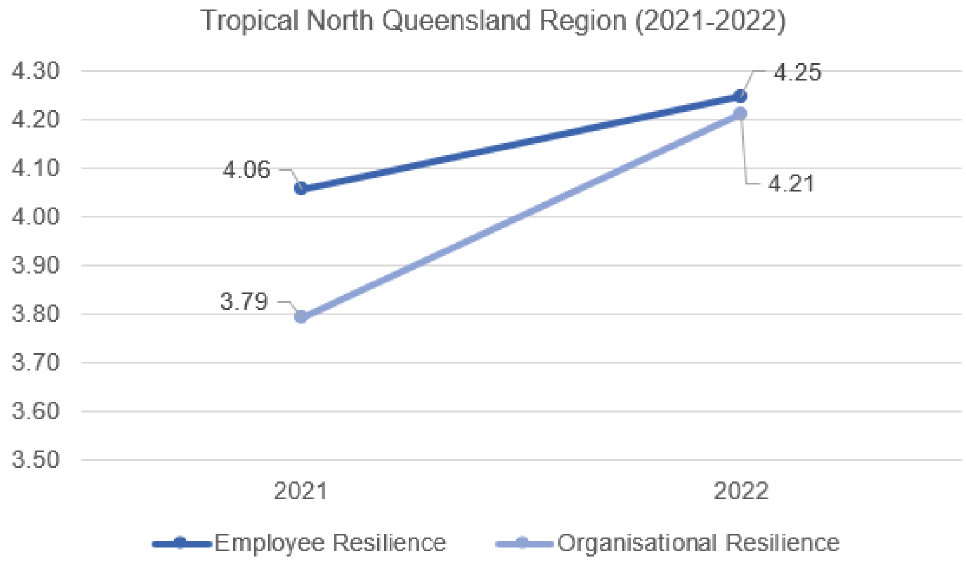
- From an HR perspective: be more mindful of the health and wellbeing of employees
- Shift from a self-resilient focus to providing more workplace resources to employees
- Teamwork and support from co-workers represents a potential strength in the industry, especially for family businesses; it is crucial to keep staff involved in creating a family-like atmosphere, and a team approach helps retain and build the resilience of an employer
- Solution:
  - Creating development programs to support the employers for the unemployed that are in the remote communities as well as local communities
  - Promoting the industry
  - Coopetition, not competition. Employers collaborate

KEY FINDING #5 Government's role in supporting tourism

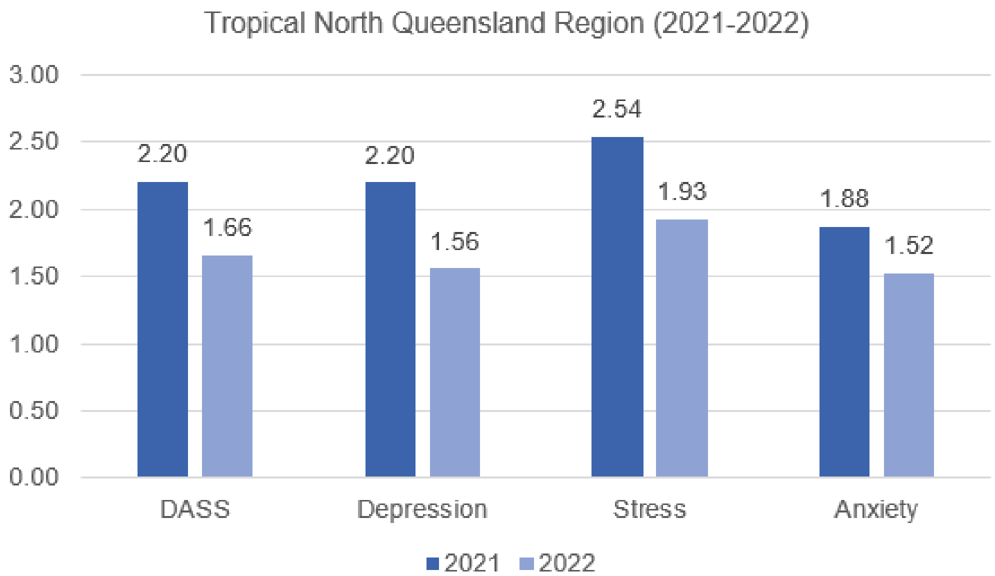
- Call for a multiple government agencies approach
- Linking international students directly with employers
- Offer business support, such as the Workforce Strategy engagement
- Make the support more accessible to small businesses
- The pre-COVID approach won't work in the recovery period; the government needs to be more adaptive

KEY FINDING #6 Survey regional highlights

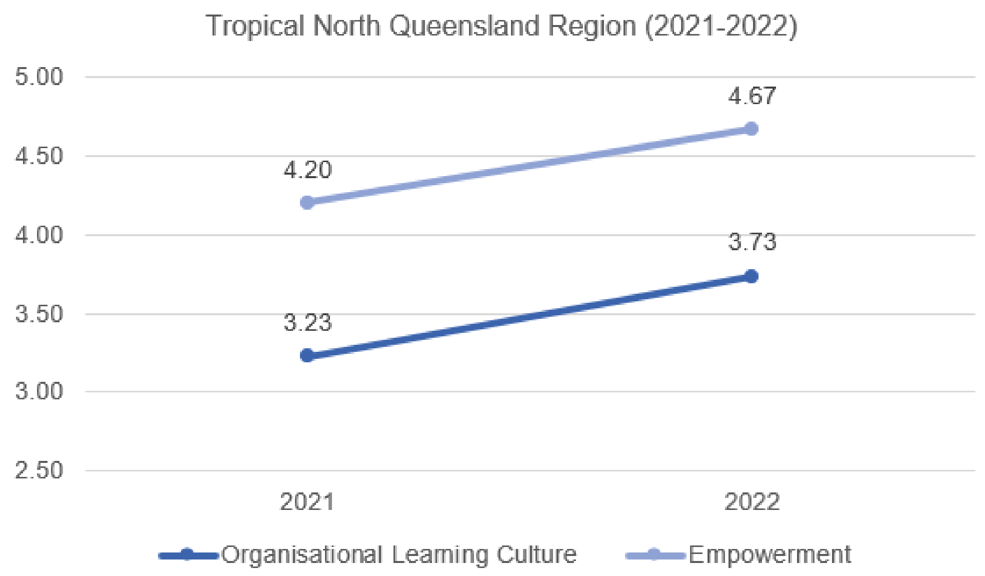
- From 2021 to 2022, overall, employees and their organisations in the Tropical North Queensland region become more resilient.



- From 2021 to 2022, employee wellbeing in this region has improved, evidenced by a reduced level in all three dimensions of DASS.



- Improvements have also been observed in organisational learning culture at the meso-level (Mean = 3.23 for 2022, Mean = 3.73 for 2021) and sense of empowerment at the micro-level (Mean = 4.20 for 2022, Mean = 4.67 for 2021).



OUTBACK QUEENSLAND REGION

On the 6th of October 2022, 6 tourism employees, operators and stakeholders from the Outback Queensland region participated in a Tourism Workforce Workshop Consultation, as part of the Advance Queensland funded "[Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan]" Project. This Summary Note shares a synopsis of discussions in relation to the above-mentioned seven key questions.

KEY FINDING #1 Tourism workforce changes and structural issues

- Skilled labour shortage
- Border closure impact (cannot open business during the peak season)
- Regional-specific challenge: gaps in services. Employees cannot get timely mental health assistance. (e.g., have limited access to mental health or wellbeing professionals (can't talk to them in person). Sometimes need to wait a couple of months to get a counsellor or psychologist)
- Nearby ongoing support is too expensive, and pressure to meet bottom-line
- Difficulties in engaging young people to get into the tourism and hospitality industry
- Lack of investment in the regions
  - Solution: engaging with high schools, educating young people about the potential career paths within tourism, changing people's perception of the industry
- Housing affordability: many empty properties are not rentable
- Regional populations are declining
- Demand for training versus the lack of resources for training
  - Solution: Business to collaborate together, promoting Indigenous tourism

KEY FINDING #2 Tourism workforce resilience

- Volunteers and their resilience under-estimated
- Macro-level: The importance of supporting small business: providing jobs and supporting communities

KEY FINDING #3 Covid-related procedures and support impact on workers

- Staff loss due to vaccination
- Employees were nervous about getting COVID and losing work
- COVID-procedures, such as isolation, amplify the short-staffed issues
- The mandate from state and federal governments are not accommodating to the situation in regions -> causing frustration to workers and employers

KEY FINDING #4 'Great Resignation' in tourism

- More job choices available, people following passions
- Lack of promotion
- Lack of training opportunities
- Inflation -> push people to move to high-paid and more secure jobs
- People are not available to multi-task (Most tourism businesses are SMEs, which requires employees to multi-task) -> burnout

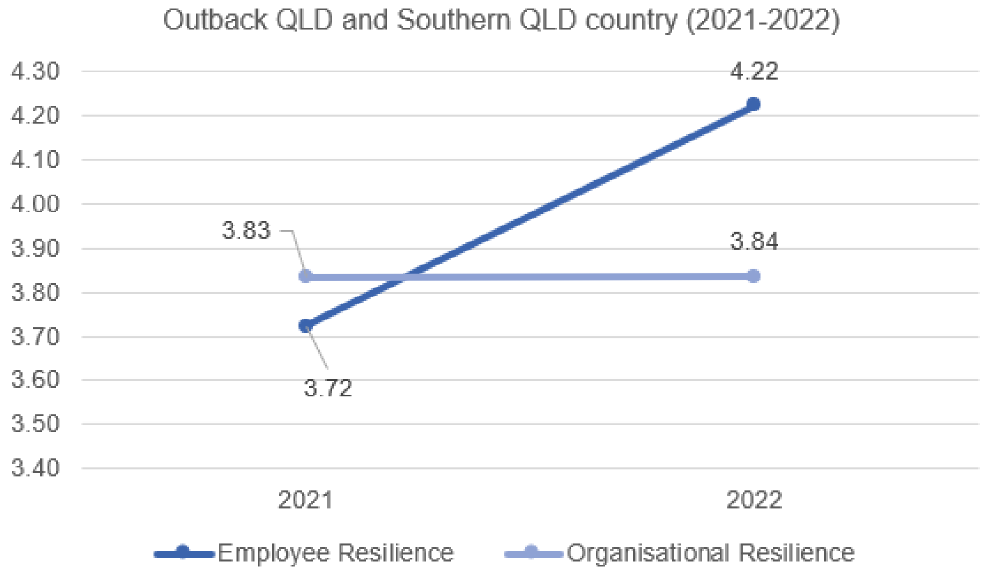
KEY FINDING #5 Government's role in supporting tourism

- Calls for consistency in communication from the government, and less ambiguity
- More support for promoting indigenous products
- More support for promoting a variety of experiences
- A generational framework not only working in its election cycle
- Government needs to diversity its support programs, going beyond funding for tourism nfrastructure, more funding in education, providing career pathways and opportunities and the attractiveness of the industry to a domestic market
- Other support: tax breaks, grant funding, immigration (e.g., four years of sponsorship is a huge commitment for both employer and employee)
- Opportunities for social enterprises

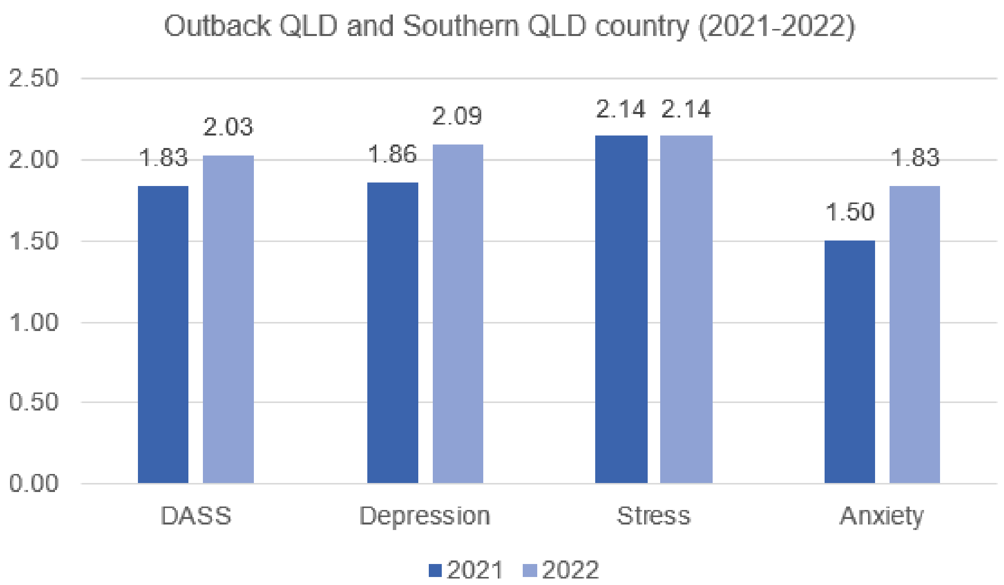
KEY FINDING #6 Survey regional highlights

- From 2021 to 2022, employee resilience in Outback and Southern Queensland Country regions has improved. In comparison, there is no significant change in organisational resilience.

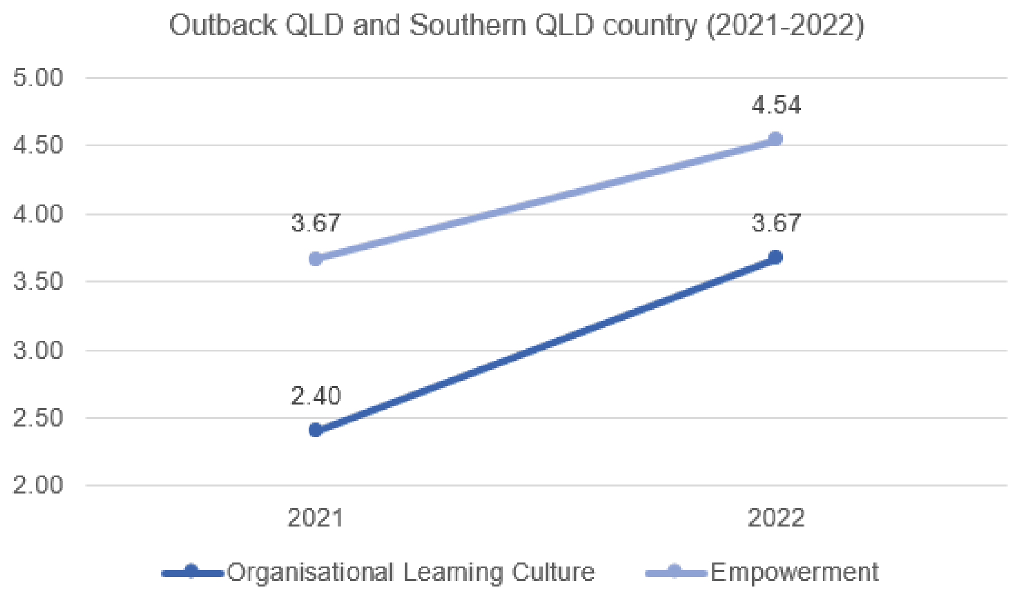
[3] Given the small sample size for Outback and Southern Queensland Country Region in the survey, we combined these two regions for analysis to enhance meaningfulness of data.



- From 2021 to 2022, employee wellbeing in this region has declined as employees feel more depressed and more anxious.



- On a positive note, from 2021 to 2022, at the meso-level tourism workers perceived a significant improvement in the organisational learning culture (Mean = 3.72 for 2022, Mean = 3.18 for 2021); at the micro-level, they feel more empowered (Mean = 3.91 for 2022, Mean = 3.65 for 2021).



SOUTHERN QUEENSLAND COUNTRY REGION

On the 11th of October 2022, 19 tourism employees, operators and stakeholders from the Southern Queensland Country region participated in a Tourism Workforce Workshop Consultation, as part of the Advance Queensland funded "Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan" Project. This Summary Note shares a synopsis of discussions in relation to the above-mentioned seven key questions.

KEY FINDING #1 Tourism workforce changes and structural issues

- Housing affordability and shortage of rentals
  - energy sector drives rents up
  - People retiring and coming to the neighbourhood
- Housing issue leads to labour shortages due to the lack of accommodation
- Tension between seasonality and needs for full-time permanent employment as opposed to casual contingent employment
  - Solution: Working collaboratively with local real estate agents to solve housing and rental issues; working closely with the community; outreach through education
- Tension between seasonality and needs for full-time permanent employment as opposed to casual contingent employment
- Rental affordability is compounded by seasonality issue:
  - Growing needs for full-time permanent employment as opposed to casual contingent employment
  - Seasonality -> causal employment -> tourism hospitality is not a career path for young people
- Training is not well-valued by the industry
- Support vacuum for some vulnerable young people who are being contingently employed, estranged from the family, not eligible for job keeper
- Disconnect between mediatised perceptions of the industry and reality

KEY FINDING #2 Tourism workforce resilience

- Training is important for businesses to grow and adapt
- The value attached to training is contingent upon the learning culture in the organisation
- The difference in training capacities between large organisations and small organisations
- Organisations should make good use of support to facilitate training
- It is important for organisations to learn, be flexible and adapt
- Challenge: organisations lack succession planning for volunteers
- Organisations may need to adapt to formalise the volunteer aspect of business, including procedures and policies to address the volunteer workforce

KEY FINDING #3 Covid-related procedures and support impact on workers

- COVID-related safety procedures (e.g., wearing a mask) is a physical manifestation of the unsafe environment -> increase employees' anxiety levels
- Some mandates also create tension and demotivate employees in terms of the intrinsic reward of serving people by reading clients' facial expressions
- Mask-wearing also trigger for lack of trust (mask-wearing was seen as something that would make you more trustworthy
- Resource availability is essential, and getting people to access resources is also important

KEY FINDING #4 'Great Resignation' in tourism

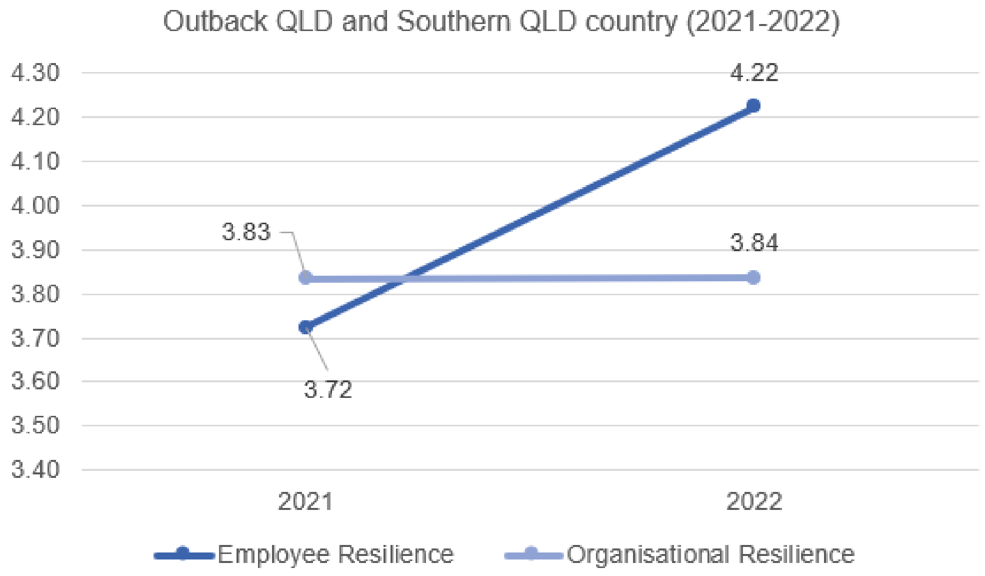
- Move to high-paid jobs
- Burnout
- Lack of positive feedback
- Work conditions: aggressive customers
- A change in sentiment due to COVID or working from home impact on the workplace (people are reluctant to come back to the office after working remotely)
- Power paradigm issue: There is a different attitude to younger people than what there is toward older people, e.g., senior workers feel disrespected in the workplace.
- The changing demographics of the labour market: a greater ageing workforce with fewer young people coming through
- Owner-operators are under greater stress in terms of work-life balance
- Labour market dynamics: current economic downturn and increased cost of living negatively affecting employment
    - Solution: Community and school engagement - involve young people and their parents to get a better understanding of tourism and hospitality career path

KEY FINDING #5 Government's role in supporting tourism

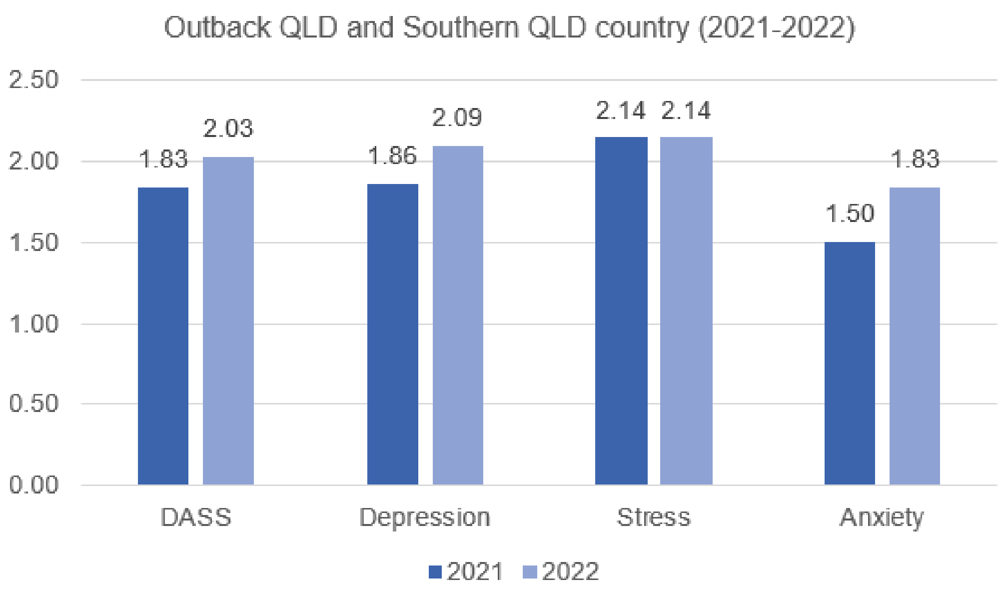
- Support to small businesses on succession plans
- Help to build connectivity to the workplace
- Long-term focus: the opportunities from the Olympics; help tourism fit into the 10-year legacy
- Support for a school-based traineeship

KEY FINDING #6 Survey regional highlights

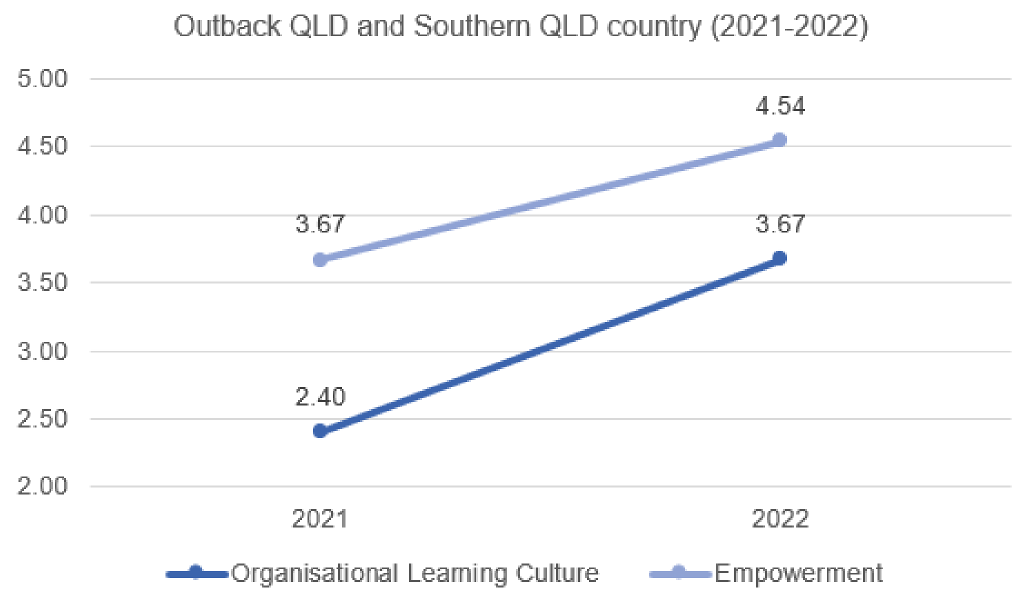
- From 2021 to 2022, employee resilience in Outback and Southern Queensland Country regions has improved. In comparison, there is no significant change in organisational resilience.



- From 2021 to 2022, employee wellbeing in this region has declined as employees feel more depressed and more anxious.



- On a positive note, from 2021 to 2022, at the meso-level tourism workers perceived a significant improvement in the organisational learning culture (Mean = 3.72 for 2022, Mean = 3.18 for 2021); at the micro-level, they feel more empowered (Mean = 3.91 for 2022, Mean = 3.65 for 2021).



WHITSUNDAYS REGION

On the 13th of October 2022, 8 tourism employees, operators and stakeholders from the Whitsundays region participated in a Tourism Workforce Workshop Consultation, as part of the Advance Queensland funded "Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan" Project. This Summary Note shares a synopsis of discussions in relation to the above-mentioned seven key questions.

KEY FINDING #1 Tourism workforce changes and structural issues

- Labour shortages
  - Rely on backpackers who are short-term
  - Employee loyalty is gone
  - People move to cities for more oppotunities
  - The accommodation situation is worsening
- Growing labour costs, together with the labour shortage, push businesses to reduce hours, resulting in more tensions with local communities (e.g., meeting the demands of the guests' expectations and looking after locals)
- Lack of clear career path
- Good change: greater importance is attached to mental health and work-life balance
- Lack of voice: Tourism is not recognised as an industry
- Seasonality and diverging needs from employees regarding full-time employment versus casual employment. Some employees look for full-time while others look for the flexibility
- Immigration process issue: skilled international workers have gone through a long process and high costs
- A silver lining: from an operator perspective, they become better, more responsible operations

KEY FINDING #2 Tourism workforce resilience

- Challenge: how to get reactive employees proactively to be resilient
- Macro-level:
  - Solution: From a tourism perspective, after JobKeeper, the government's support for tourism businesses disappeared
  - Development of new tourism experiences and infrastructure should work together with supporting local businesses

KEY FINDING #3 Covid-related procedures and support impact on workers

- COVID-related mandate indirectly contributes to the labour loss in tourism (e.g., big staff loss on 17th of December)
- COVID has brought changes in leadership: managers have become more empathetic, and changes in HR management: being more supportive and flexible

KEY FINDING #4 'Great Resignation' in tourism

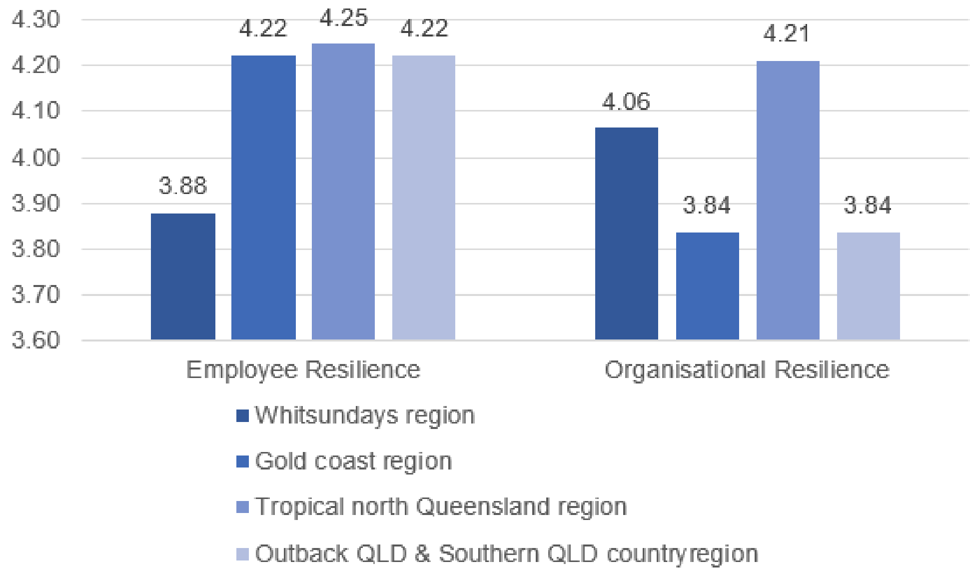
- Chasing passions: left tourism to become influencers or photographers, which has more flexibility
- Working for industry rather than in the industry (e.g., starting up a web design company
- Re-study grants during COVID has enabled some people to move to different industries (e.g., they took a beautician course and opened their own business)
- But there are also people who return to tourism after working in a different industry
- COVID highlighted the insecurity of hospitality and tourism employment
- Young get money from the government and decide to leave a low-budget lifestyle
- Regional drain: people move to big capital cities
- Domestic market face competition from low-cost destinations

KEY FINDING #5 Government's role in supporting tourism

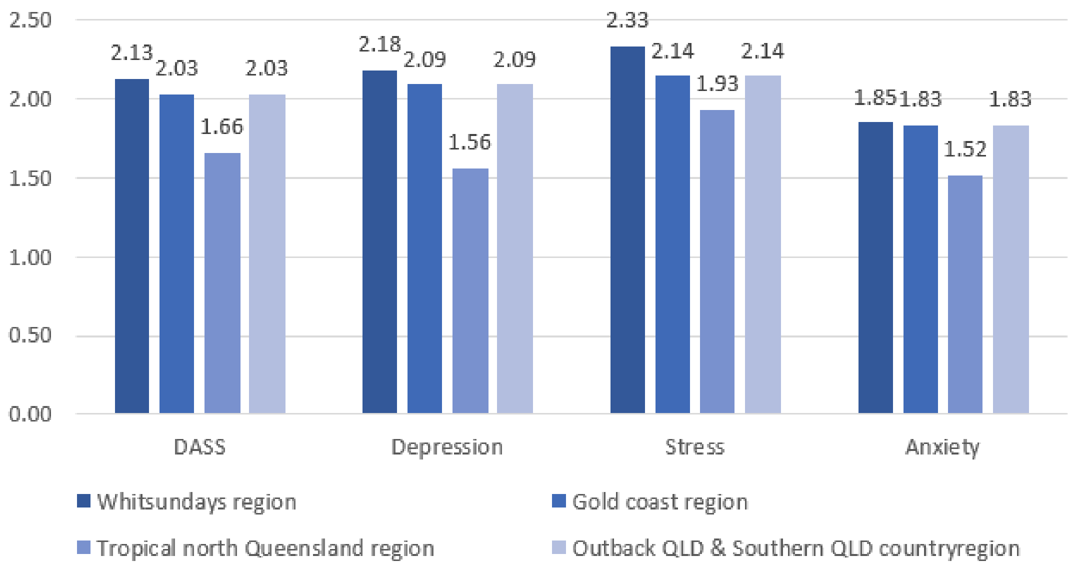
- Government support in the development of infrastructure (e.g., mountain bike trails) and local businesses
- Support for 2032 Olympics-related tourism experience, and grow the tourism ecosystem
- Federal or State support in regard to the structure of loan grants, low-interest loans to support small businesses
- Increase traineeship programs
- Make traineeship programs more accessible to employees and employers (e.g., the burden of administration has kept small businesses away from accessing government support programs)
- Remove barriers to getting the support that is needed for transitioning from one role to another
- Immigration: high costs of the sponsorship and financial burden on businesses
- Support training in small businesses

KEY FINDING #6 Survey regional highlights

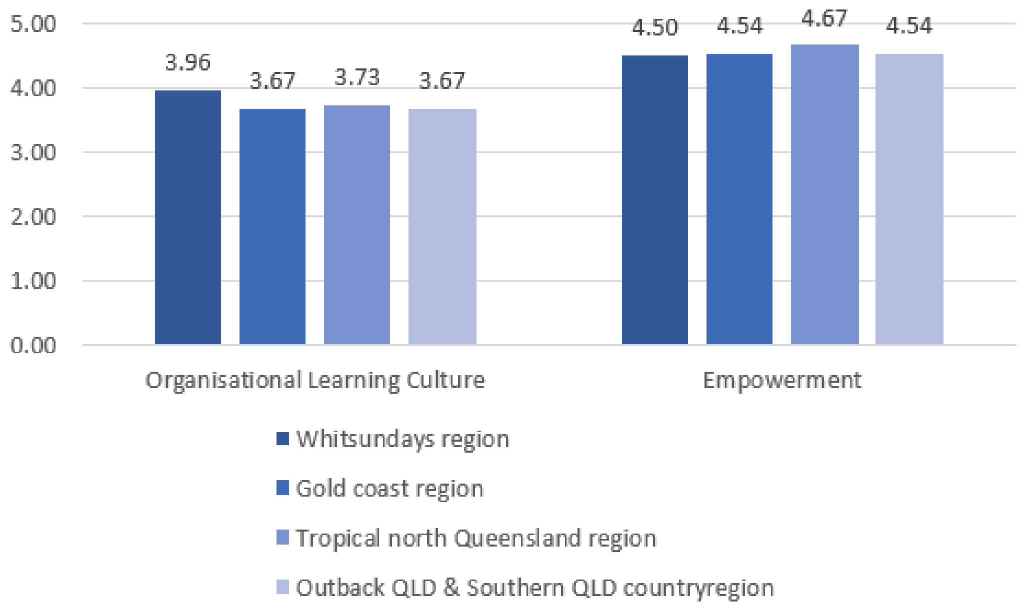
In 2021 survey, we did not receive any responses from Whitsundays or its neighbouring regions. Therefore, cross-time comparative analysis is not available. Instead, we conducted a comparative analysis by comparing Whitsundays with other regions (i.e., Gold Coast region, Tropical North Queensland region, and Outback Queensland and Southern Queensland Country region). The results showed that across these regions, Whitsundays has the lowest level of employee resilience as measured in 2022. In comparison, organisational resilience is relatively high.



- Regarding employee wellbeing, tourism workers in the Whitsundays region report a lower level of wellbeing in comparison to other regions.



- There is no significant difference in empowerment between Whitsundays region and other regions. Tourism workers reported relatively higher levels of organisational learning culture in this region.



BEST POLICY & MANAGEMENT PRACTICES FOR WORKFORCE RESILIENCE

MANAGERIAL PRACTICES

- Find ways to enhance job security (e.g., contracts)
- Promote collegial, supportive workplaces
- Dignify workers with positive workplace practices
- Invest in leaders and supervisors' managerial practices
- Provide succession planning for employees
- Attract long-term unemployed and other marginalised groups
- Invest in attracting a more mature workforce
- Formalise and incentivise volunteer conditions
- Resilience be considered a boundless characteristic (crises are cumulative)

DESTINATION SUPPORT STRATEGIES

- Foster greater in-region stakeholder and business-to-business collaboration
- Promote co-opetition and greater whole-of-community engagement
- Arrest region to city drain by offering incentives to stay
- Revitalise tourism employer/employee brand
- Focus on culture and vibe of industry, not pay
- Target key influencers (e.g., parents, career advisors)
- Agitate for more cohesive whole-of-industry advocacy

POLICY SUPPORTS

- Greater investment in traineeships (including school-based), accessibility, retention - and cutting administrative burden for organisations
- Develop other business learning and development supports that do not negatively impact bottom line
- Better promote awareness of business supports (e.g., wage subsidies) to operators
- Develop resources to support succession planning initiatives
- Develop incentives to attract mature age (including self-funded pensioners)
- Additional policy supports needed to retain aged workers (e.g., counter ageism)
- Overcome barriers to SMEs lack awareness of, and access to, resources
- Incentivise and support social enterprises
- Improve (mediatised) industry image to attract workers to careers, supported by accessible education and training
- State and Federal government loan/low interest rate initiatives for SMEs and more tax breaks
- Policy to focus on long-term solutions
- Dispense with electoral cycle policy and embrace a long-term generational policy framework
- Inconsistency in messaging between three levels of government a continued issue – adopt a whole-of-government approach
- Urgency in 2032 Brisbane Olympics/Paralympics preparedness required

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