QUEENSLAND TOURISM WORKFORCE CRISIS RESILIENCE & RECOVERY PROJECT

FINAL REGIONAL CONSULTATION WORKSHOPS AND NATIONAL SURVEY REPORT

QUEENSLAND TOURISM INDUSTRY COUNCIL

The Voice of Tourism

THE UNIVERSITY OF QUEENSLAND
AUSTRALIA

CREATE CHANGE

Acknowledgement of Country

QTIC acknowledges the Traditional Owners and Custodians of Country throughout Queensland. We recognise those who shared stories, welcomed guests on Country, and were stewards of the earth for millennia before us, and their continued connection to land, waterways, and culture.

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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About The University of Queensland

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EXECUTIVE SUMMARY

This report summarises the findings of the 2023 iteration of the Queensland Tourism workforce crisis resilience & recovery project, and with the previous five reports informed the Queensland Tourism Workforce Crisis Resilience & Recovery Strategy. Data supporting this report were gathered from in-region consultation workshops and a Queensland-focused but nationally distributed survey. Five in-region workshops engaged 73 participants representing key stakeholder groups across a range of tourism sectors. Since 2022, the key tourism workforce changes reported included a persistence of staff shortages however somewhat eased by the return of various migrant and holidaying visa holding cohorts. A deficit in skills from applicants was a major labour concern amongst employers, compounded by reluctance from experienced mid-tier tourism employees to return, having found secure employment in other sectors valuing their transferable skills amid COVID-19. A strong candidate's market was putting pressure on operator costs and margins. Youth draining from regional areas compromised this valuable and traditionally flexible labour cohort. Persistent structural issues were reported as housing affordability and availability which were heightened by inflationary and cost of living pressures. Transport availability in regional areas was also a concern. Continued negative perceptions of working and seeking careers in the industry persist affecting a pipeline of available and effectively trained and skilled job-ready workers. Operators were embracing a return to seasonality but recognised the challenges in attracting and retaining workers on secure conditions. An appetite for accessing underemployed cohorts was dampened by the lack of services to support them. Reflections on COVID-19 recovery policies and actions were honest and wide-ranging. Overall sentiments suggested policy over-reached on health mandates resulting in workers leaving or experiencing anxiety, and border restrictions were too harsh and lengthy impeding recovery via access to workforces and visitor markets. Supply chains have also not recovered. The treatment of international students and some ineffective active labour market policies were reported as misjudgements. JobKeeper, while acknowledged as effective overall, was unevenly accessible and distributed. Some operators are reflectively regretful of some business decisions they made, for example redundancies of key workers and investments (to house workers).

Analysis of the survey, which attracted 340 respondents, found similar and representative labour force demographics. About 28% of respondents resided in Queensland, allowing for meaningful comparisons between States. Nearly half the respondents worked in food service, a fifth in accommodation, and the remainder in a range of tourism, events, and retail sectors. The 2023 survey used similar measures to the 2021 and 2022 iterations, allowing meaningful comparisons, however, the 2023 survey was the first to be administered when there were no travel or safety restrictions. Nonetheless, results show that Employee Resilience was lower than amid-COVID-19 (2021) despite a marked uplift in 2022. Measures of 'collaboration' and 'change', to handle challenges and enable growth respectively, contributed most to this decline. A significant predictor of Employee Resilience, Learning Culture, also declined. Queensland's Employee Resilience lagged all States except Victoria and South Australia. This is concerning as Queensland's Employee Resilience was previously stronger than almost all the other States. Employee Psychological Empowerment and Employee Wellbeing remained stable, although respondents reported elevated levels of Anxiety.

Organisational Resilience was also lower than in 2022, as were measures of Organisational Change and Organisational Strategy. Again, Queensland's Organisational Resilience lagged all States except Victoria and South Australia. Findings contained in the workshops and surveys specific to the five regions (Outback, Southern Queensland Country, Whitsundays, Gold Coast and Tropical North Queensland) found while many issues were consistent, differences were discerned. These were mainly between the Gold

Coast and Tropical North Queensland who rely more heavily on international tourism, and the other regions that are currently more reliant on domestic tourism. Finally, regarding sectoral differences, there were minimal differences, however, dissimilar to 2021 and 2022 when accommodation sector employees fared better, in 2023 food service employees showed higher scores in terms of Resilience and Wellbeing. This is somewhat surprising as the data show accommodation offers the most fulltime positions (a proxy for secure work).

INTRODUCTION: QUEENSLAND TOURISM WORKFORCE CRISIS RESILIENCE & RECOVERY PROJECT

Project Overview

This project has over the past three years investigated the Queensland tourism industry's workforce. 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 was 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. As with the five reports that preceded it, this report is a companion to the Queensland Tourism Workforce Crisis Resilience & Recovery Strategy and summarises the past 12 months research findings. We are confident it provides evidence that informs the recommendations delivered in the final Strategy, and pinpoints areas in which industry, policymakers, workers, and community stakeholders can build resilience as the State gears up for the Brisbane 2032 Summer Olympic and Paralympic Games.

A word from QTIC's Chief Executive Officer

This is the sixth and final report of our collaborative project, focusing on the results obtained from the 2023 national survey. The survey was conducted through numerous channels, including our QTIC and kindred association memberships, as well as in-region consultation workshops with five of Queensland's Regional Tourism Organisations. Noteworthy findings from the survey include a comparison of employee and organisational resilience between 2021 and 2023, and a sectoral comparison of resilience.
The consultation workshops with stakeholders and operators, at various levels including employee, organisational, destination, and policy, provided valuable insights and suggestions to enhance the recovery and resilience of Queensland's tourism industry. Together, with the other reports in this series, we have the evidentiary foundation for our project's final deliverable: the Queensland Tourism Workforce Crisis Resilience and Recovery Strategy.

Brett Fraser
Chief Executive Officer
Queensland Tourism Industry Council

METHODS & AIMS

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

- An Australia-wide tourism workforce survey, and
- In-region consultation workshops.

Study 1: Tourism workforce survey

An Australia-wide survey was administered among tourism, hospitality and related sector professionals between August and September 2023. The survey at the broadest level had two 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 surveys – and identify the significant changes in these factors.

The survey was created in the survey platform, Qualtrics®. The survey contained both closed and open-ended questions, grouped into four sections: (a) organisational resilience and learning culture; (b) employee resilience empowerment and wellbeing; (c) company and job information; and (d) demographics. To quality assure the survey, we conducted 18 pilot tests of the survey with tourism employees. We used a variety of survey channels: purchased panel data (via PureProfile®), and distribution to the membership databases of Queensland Tourism Industry Council (QTIC), The Tourism Group, in-region workshop consultation participants across the life of the project, 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.

Study 2: In-region consultation workshops

Between August and September 2023, five consultation workshops were facilitated in five regions of Queensland: Outback, Southern Queensland Country, Gold Coast, the Whitsundays, and Tropical North Queensland. The main aim of these consultation workshops was to collect information about tourism workforce changes since 2022, the challenges faced by tourism organisations, the support they are looking for, and the ways stakeholders had sought to address their challenges, and a snapshot of the draft Strategy for comment. A total of 73 participants attended these workshops. Four workshops were conducted face-to-face in-region, with participants from Outback Queensland joining virtually. Each workshop lasted approximately two hours, and discussions 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 and the elicitation of key up-to-the-minute issues in the regions.

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. **Reflecting on decisions that were made (by individuals, businesses, or policymakers) in the amid/post COVID-19 period, did any have unintended/negative consequences?**
4. **How can the Strategy be improved?**

The questions were intended to extend on findings from the 2022 key findings (see the three 2022 reports), which reflected the perspectives of 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.). Questions were also informed by the results of 2022 survey analysis which indicated that improvised decision-making may have led to unexpected outcomes and maladaptive practices. Additional questions are based on the empirical evidence in the tourism workforce literature.

This report begins with the overall findings from the national tourism workforce survey and in-region workshop consultations, 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 an overall purview to regions and State stakeholders on the main themes emerging from each workshop and the survey. The companion Queensland Tourism Workforce Crisis Resilience and Recovery Strategy was published on the QTIC website in October 2023, which consolidated findings of this and the other five project reports into an accessible resource.

OVERALL SUMMARY OF IN-REGION WORKSHOP CONSULTATIONS

Five regions in Queensland participated in the in-region Tourism Workforce Workshop Consultations from August to September 2023. In total, 73 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 1). The average age of the workshop participants was 47 years old, and 67% of them were female.
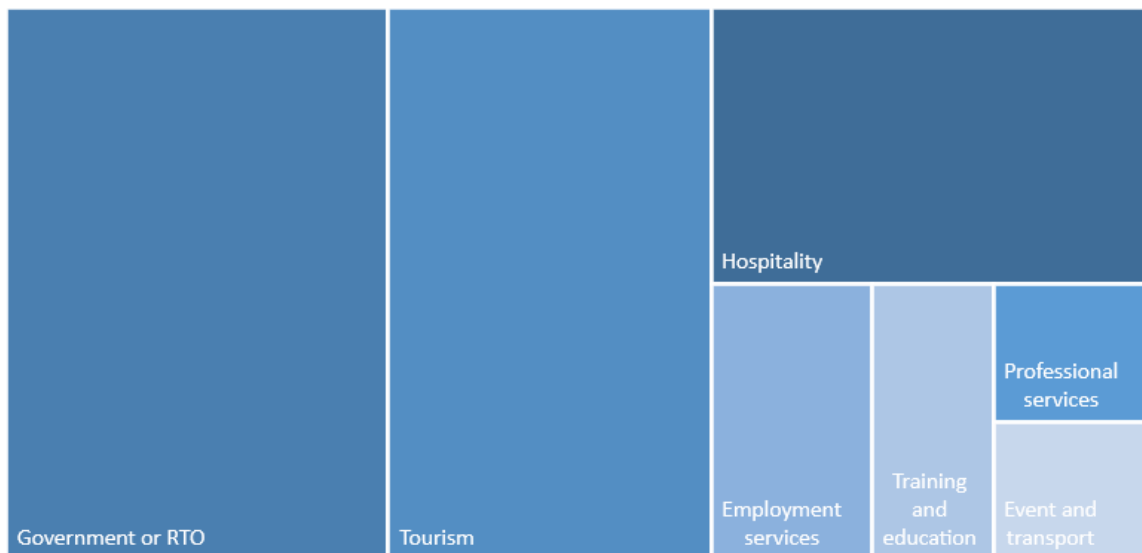

Table 1. Sample profile – sector

KEY CONSULTATION FINDINGS

FINDING #1 Tourism workforce changes

- Staff shortages continue in some regions
- While some staff have returned, there remains a shortage of adequately trained and skilled workers
- Lack of skilled workers negatively impacting service quality
- While the return of backpackers and migrants was a welcome relief for some regions, there was consensus that they were over-relied on
- Employees are more selective about where and how they want to work
- Potential employees attracted to other industries
- Some workers have increased power to negotiate higher salaries or other benefits
- Some operators attempt to retain workers through training and offering management opportunities
- However local workers who usually filled seasonal roles like housekeeping have not returned
- Retention of youth and regional drain remains an ongoing concern
- Operators face challenges retaining volunteers
- Job insecurity remains an ongoing issue
- In some cases there was more stability in workforce, with less turnover, however, turnover of casual staff was still high overall
- General unemployment rates are higher, though industry faces ongoing challenges to attract underemployed cohorts
- Some underemployed cohorts not as attracted to Queensland as previously
- Advertised positions are oversubscribed with applications, though many applicants are not suitable or withdraw during the process
- Limited opportunities for intergenerational and cultural knowledge transfer between workers as many experienced workers have not returned

FINDING #2 Ongoing structural issues

- Housing availability and affordability a perpetual issue: many businesses need to source their own properties for staff
- Cost of living increases have led to people looking for more full-time work rather than casual work
- Limited transportation is a challenge for workers in some regions
- Insecurity and lack of flexibility negatively affecting staff turnover and retention
- Enduring negative perceptions and misconceptions of the industry are an impediment to recruiting workers
- Specialist training, for example marine tourism, is sometimes not available in the region of need
- Limited educational opportunities an inhibitor to employee retention
- Industry faces challenges attracting workers from comparative industries like health and allied, disability and/or social services, and agriculture
- Retaining underemployed cohorts is difficult due to lacking support services
- Inconsistency and seasonality of the visitor market, e.g., trip cancellations, negatively impacting the workforce
- Diversification was considered important for all industries (including Tourism)
- Operators are cognisant of the need to diversify offerings
- There was recognition that destinations lacked unity – meaning they were unable to meet customer expectations
- Increased costs, like insurance premiums, inhibited human resource management investments for operators
- Some operators thought government regulations were overly restrictive
- Industrial reforms are negatively impacting operators
- Some operators believed welfare was too generous and impeded incentives to work for potential employees
- High staff turnover negatively impacted organisational resilience
- Some operators were overworked and did not consider it feasible to take leave

FINDING #3 Reflections on decision-making & the pandemic

Employees

- Enforcement of COVID related policies was traumatic for some workers – who have since left the industry
- Employee expectations on work conditions have shifted following the pandemic

Operators

- Recognition that making people redundant was sometimes a mistake – with negative consequences for remaining employees who were required to take on additional responsibilities – leading to overwork
- Affected workers have since moved on to other industries
- Allowing some workers to work from home led to inequities amongst workers
- Optimism in 2022 which was considered a contributor to organisational resilience, has since faded
- Successful operator pivots and collaborative approaches during the pandemic have led to increased organisational resilience
- Some operators streamlined their offerings to remain affordable to consumers – leading to organisational resilience
- Some participants found positive outcomes from the pandemic, allowing volunteers and staff time to rest and complete outstanding projects
- Operators have renewed appreciation for seasonality of the market
- There is a nervousness and risk aversion around staging events
- The pandemic and global supply chain issues reiterated the need to connect with local suppliers
- Some operators bought or leased "crew houses" to support employees with accommodation – with mixed results and financial legacies

Stakeholders

- COVID was a missed opportunity to institute mentoring programs and other transfer of knowledge
- Policy decisions were seen as rushed, leading to unexpected consequences
- Limited internet connectivity in regional areas made enforcement of some regulations, like QR code check-ins, difficult
- Participants were appreciative of the benefits of JobKeeper, however distribution was seen as problematic and an impediment to staff recruitment
- Other policies, like "Work in Paradise", were considered a wasted investment
- Vaccine mandates were considered polarising and limited opportunities for some workers. Subsequently, operators lost skilled staff
- Less prevalent roles, like tour guides, language guides, and AV operators, felt underrepresented and underfunded by policymakers
- The COVID-19 Pandemic Event Visa was beneficial in allowing backpackers to stay in region
- Recognition that disenfranchised groups, like international students, have been treated poorly

OVERALL SUMMARY OF TOURISM WORKFORCE NATIONAL SURVEY

SAMPLE CHARACTERISTICS

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	42	18.8
26-35 years	74	23.5
36-45 years	63	17.1
46-55 years	60	18.5
56-65 years	59	12.1
Above 65 years	30	3.5

Table 2. Sample Profile – Age

Age	Count	%
Male	139	41.5
Female	187	55.8
Prefer not to say	2	0.6

Table 3. Sample Profile – Gender

Age	Count	%
High school junior or equivalent	13	3.9
High school senior or equivalent	95	28.4
Diploma/Trade qualification	114	34
Bachelor's degree or equivalent	81	24.2
Post-graduate degree or equivalent	24	7.2
Other	2	0.6

Table 4. Sample Profile – Educational Backgrounds

Regarding nationality, most participants (73.4%) identified as Australian (n=253). The rest were a myriad of nationalities, including British (n=26), New Zealander (n=11), and others. In terms of the current residential location of respondents, the majority came from three States: Queensland, New South Wales, and Victoria.
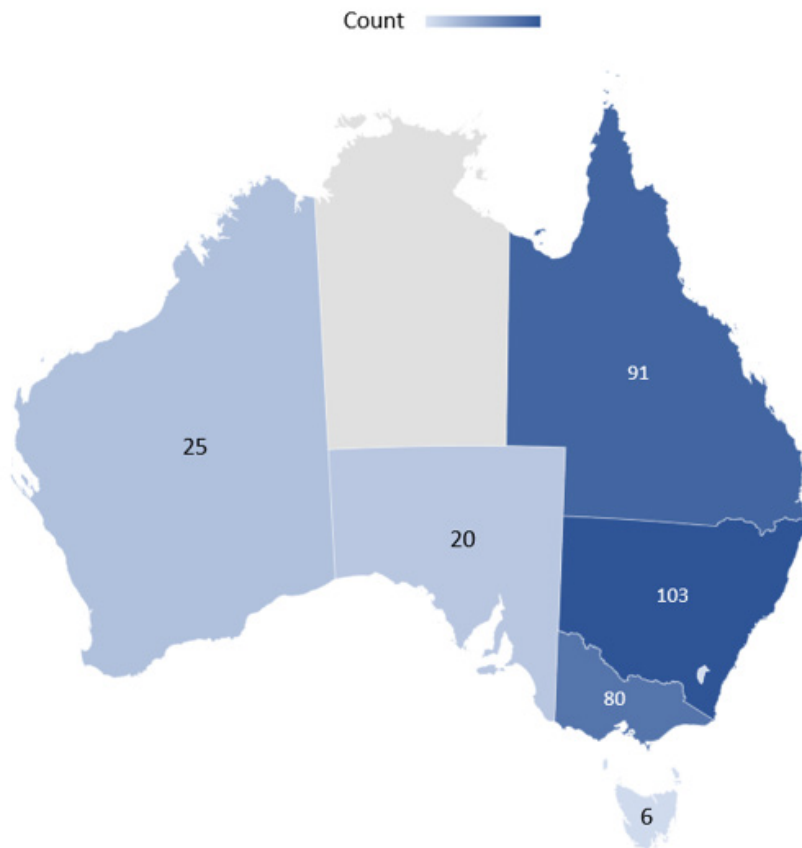
Among the 91 respondents residing in Queensland, we asked their specific region. Consistent with the population distribution, the regions that attracted the most responses are Brisbane (n=39) and Gold Coast (n=15).

Table 5. 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.
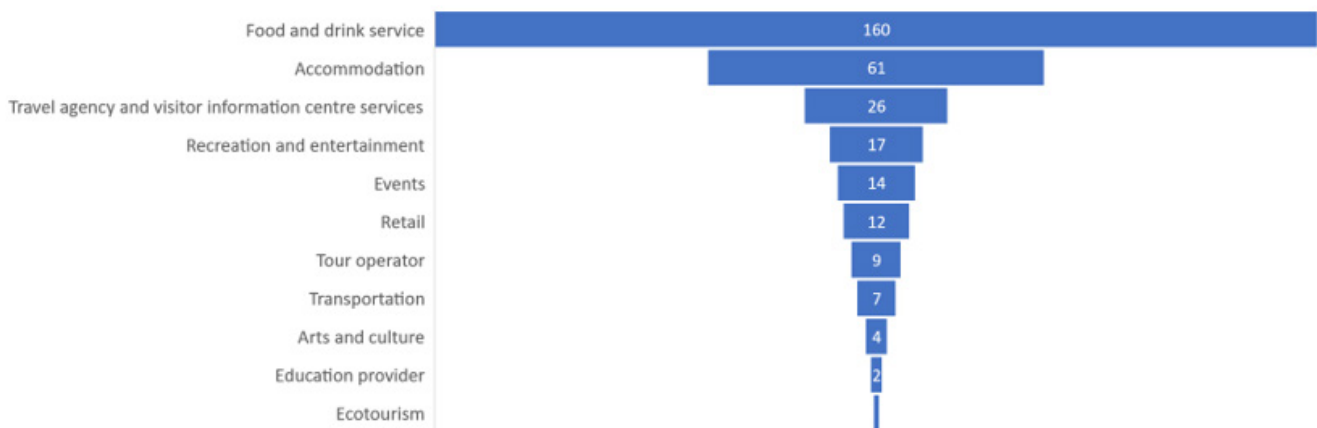
Table 6. Sample Profile – Main activities of the organisation

Regarding the size of the organisations, the results show that the industry is dominated by small-medium-sized enterprises (SMEs), with 82% of respondents working at organisations with fewer than 200 employees (see Table 7). A crosstabulation analysis shows that most business are small or medium sized (i.e. food and drink providers, 50% micro and small, 38% medium).

Organisation Size	Count	%
Sole proprietorships and partnerships without employees	8	2.4
1-4 employees (i.e., micro businesses)	24	7.2
5-19 employees (i.e., small businesses)	103	30.7
20-199 employees (i.e., medium businesses)	117	34.9
> 200 employees (i.e., large businesses)	58	17.3

Table 7. Sample Profile – Organisation size

Regarding the operating years of the organisation, 35% of the sample indicated their organisations have been operating for more than 21 years (see Table 8).

Operating years	Count	%
less than one year	5	1.5
1-2 years	15	4.5
3-4 years	33	9.9
5-10 years	76	22.7
11 to 20 years	66	19.7
21 years or more	118	35.2

Table 8. Sample Profile – Organisation operating years

Regarding the primary source of visitors, most businesses (65%) are domestic market-focused, and 33% of businesses have an even split of international and domestic visitors (see Figure 2).
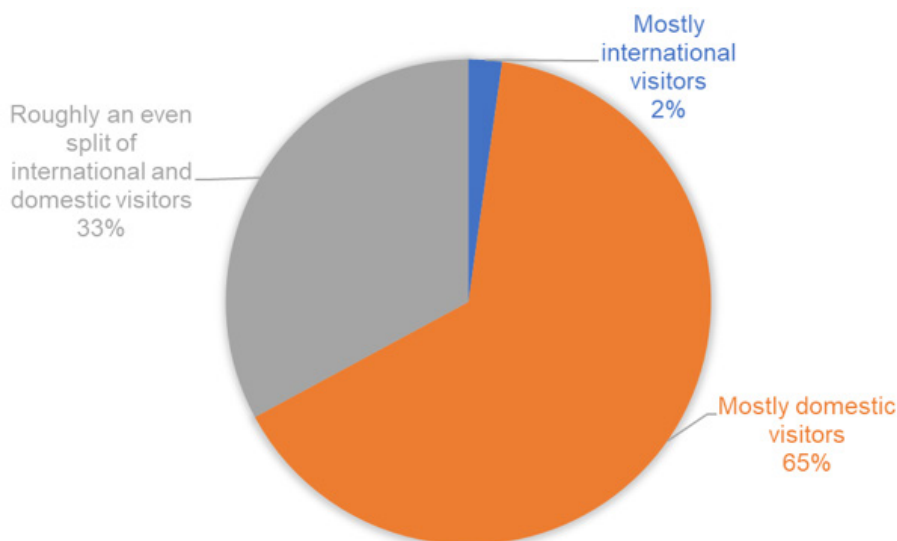
Figure 2. Sample Profile – Organisation target market

Around 32% 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 3).

Figure 3. Sample Profile – industry body

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	80	23.9
Between 3 and up to 10 years	97	29.0
Between 10 and 20 years	82	24.5
More than 20 years	72	21.5

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

Years in the Current Organisation	Count	%
Less than 3 years	152	45.4
Between 3 and up to 10 years	107	31.9
Between 10 and 20 years	44	13.1
More than 20 years	27	8.1

Table 10. Sample Profile – Years at the current organisation

While nearly half the sample was employed full-time, 45% was employed part-time, casually or under other contingent worker arrangements. The sample also included 4% of self-employed respondents, who identified as owner-operators.

Employment status	Count	%
Full-time	163	48.7
Part-time	77	23.0
Casual	66	19.7
Volunteer (Visitor Information Centre)	6	1.8
Unemployed / looking for work (other industry)	1	0.3
Unemployed / not looking for work	1	0.3
Self-employed (i.e., Owner operator)	13	3.9
Other	2	0.6

Table 11. Sample Profile – Employment status

With regards to weekly working hours, the average weekly working hours of the sample is 32 hours. Over half of respondents worked between 21-40 hours per week, while 18% worked longer hours (over 40 hours per week).

Figure 4. Sample profile - Working hours

An open-ended question asked respondents to indicate their job role and sector, and this is represented in Figure 5 below. Most respondents were managers or assistant managers; the next common job roles were customer service and kitchen hands.

Figure 5. Sample profile - Job roles

COMPARATIVE ANALYSIS OF EMPLOYEE & ORGANISATIONAL RESILIENCE: 2021 TO 2023

1. Employee resilience and contributing factors: comparison between 2021 and 2023

We performed a series of comparative analyses with the survey responses collected at three 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. During time 2 data collection (October to November 2022), most travel and safety restrictions are removed but some conditions remained in place in some jurisdictions. During time 3 data collection (August to September 2023), travel was flowing freely and there were no safety restrictions.

A comparative analysis across three time periods with regards to employee resilience, defined as actions employees choose to take to deal with work-related challenges in a crisis context, suggests that employees' self-reported resilience has a slight improvement from 2021 to 2022 (see Figure 6) but then declines below 2021 levels in 2023. A further investigation of the specific areas for improvement shows that employee capacity to manage a high workload improved from 2021 to 2022, however it declined in 2023. Improvements of work processes as well as opportunities for growth have also declined since 2022.

Figure 6. Overall employee resilience: 2021 vs 2023

Overall cooperation to address challenges has declined since 2021 (see Figure 7). For cross-state comparison, tourism workers in Queensland experience one of the lowest levels of resilience (see Figure 8).
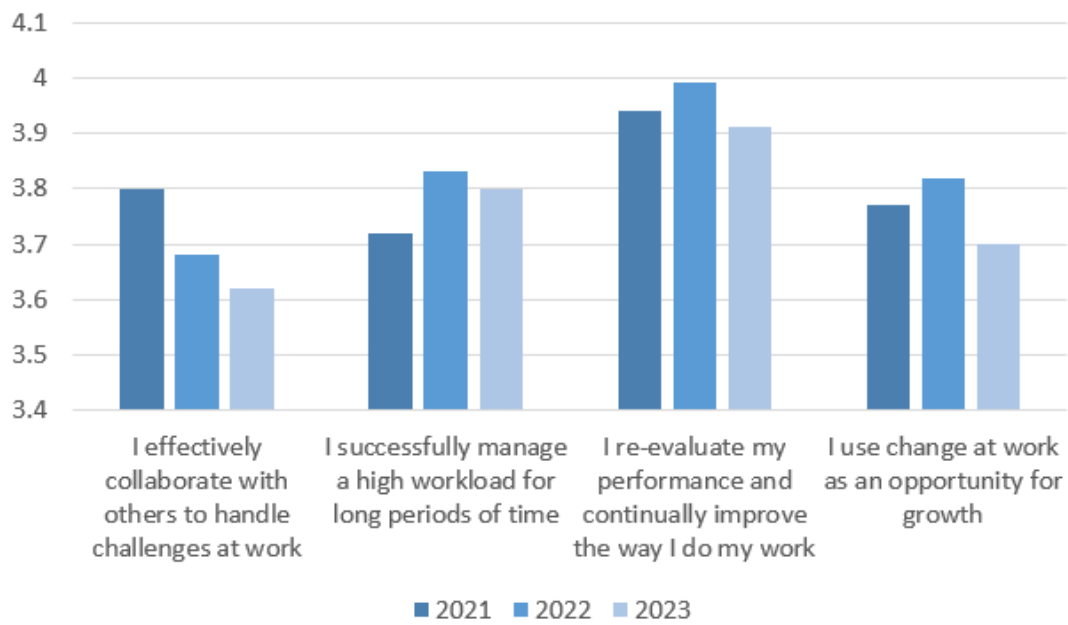
Figure 7 - Specific items of employee resilience: 2021 - 2023
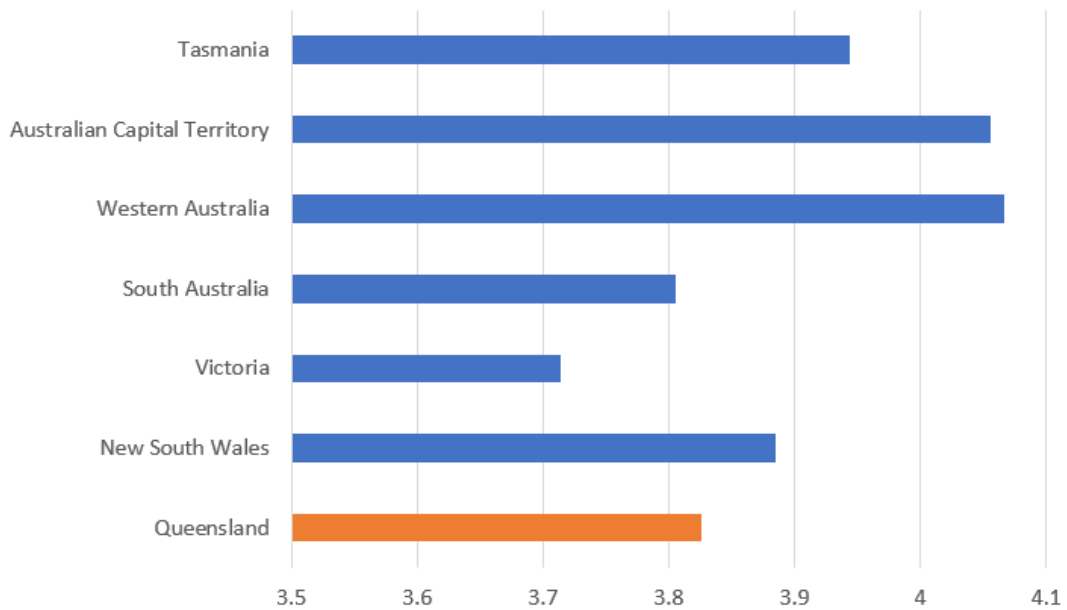
Figure 8 - Employee Resilience - State Comparison[1]

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[1] There are no survey responses from NT.

According to our previous research findings, 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)[2]. By comparing employees' experience of overall empowerment, as well as four specific dimensions, it shows that in 2022, employees experienced the highest level of empowerment across most dimensions (see Figure 9). Such positive change in empowerment is likely to explain the highest level of employee resilience in 2022 but not for 2023. Employee psychological empowerment does not change much between 2022 and 2023 however employee resilience declined. This provides evidence that other factors, beyond empowerment, are important for employee resilience.
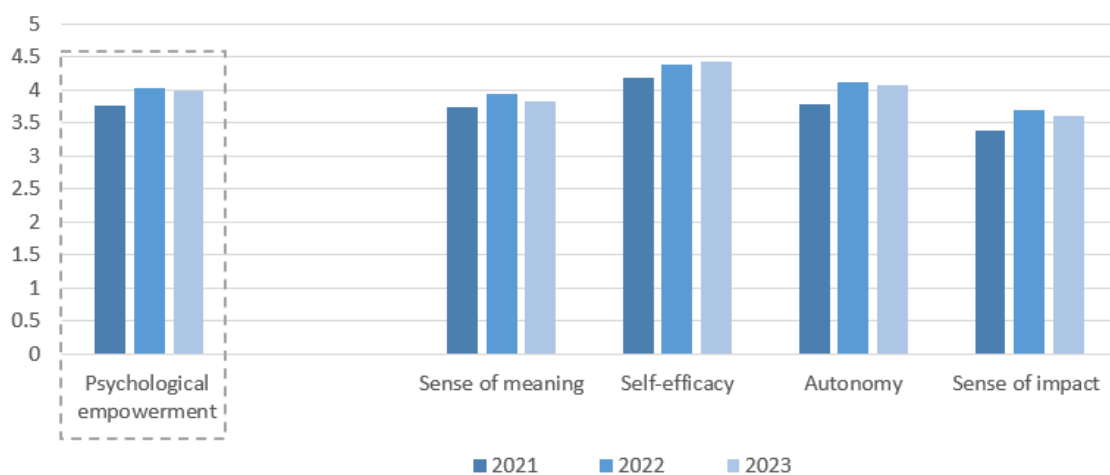
Figure 9 - Employee psychological empowerment: 2021 - 2023

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, 2022 and 2023 also indicates the highest level of employees' perceived organisational learning culture in 2022 (see Figure 10). This finding provides another possible explanation to the different levels of employee resilience in 2022 and 2023.

2 Spreitzer, G. M. (1995). Psychological empowerment in the workplace: Dimensions, measurement, and validation. Academy of Management Journal, 38(5), 1442-1465.
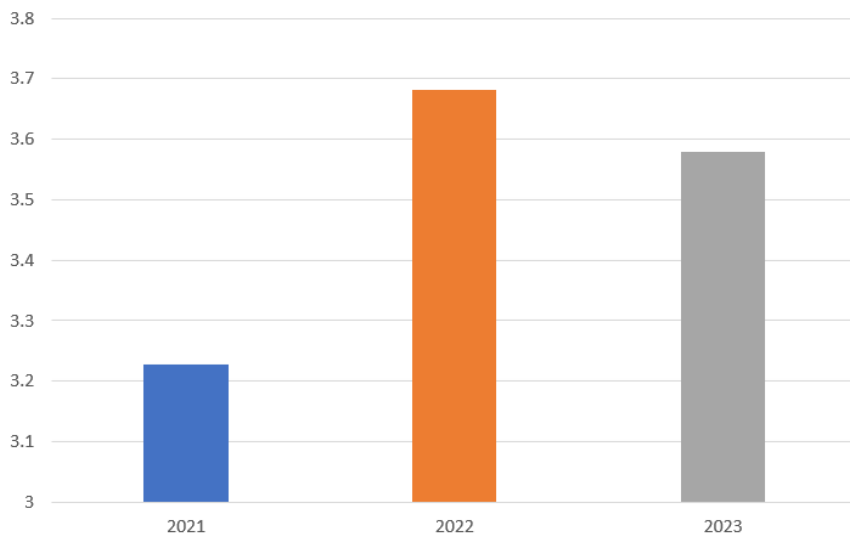
Figure 10 - Organisational learning culture: 2021 - 2023

2. Employee wellbeing 2021 to 2023

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 11).
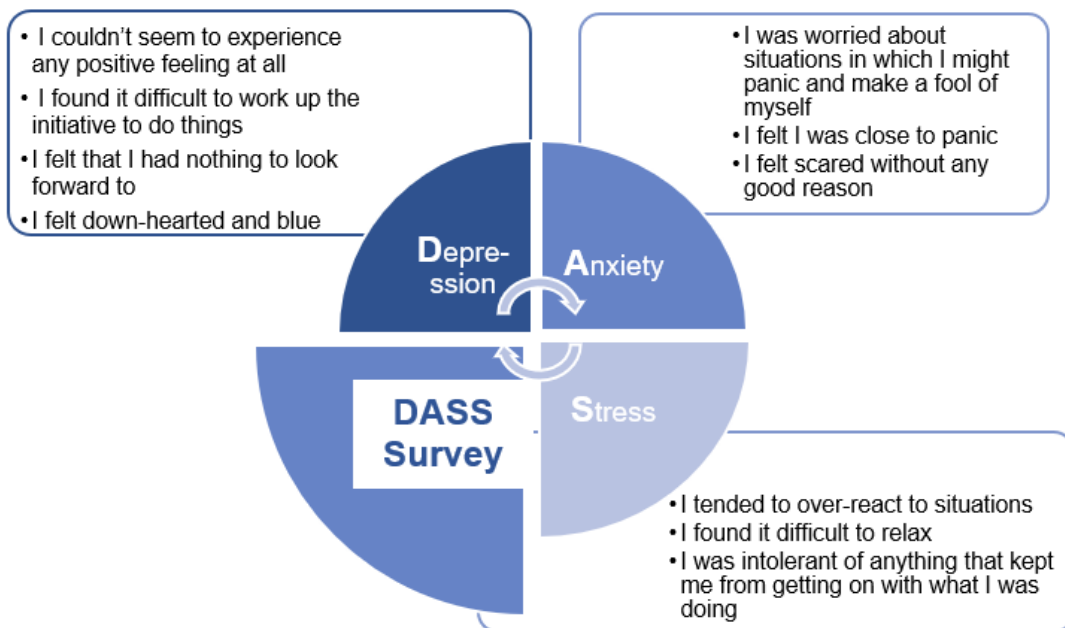
Figure 11 - DASS dimensions and items

From 2021 to 2022 and again to 2023, employee wellbeing has improved, evidenced by a decline in depression, anxiety, and stress levels (see Figure 12).
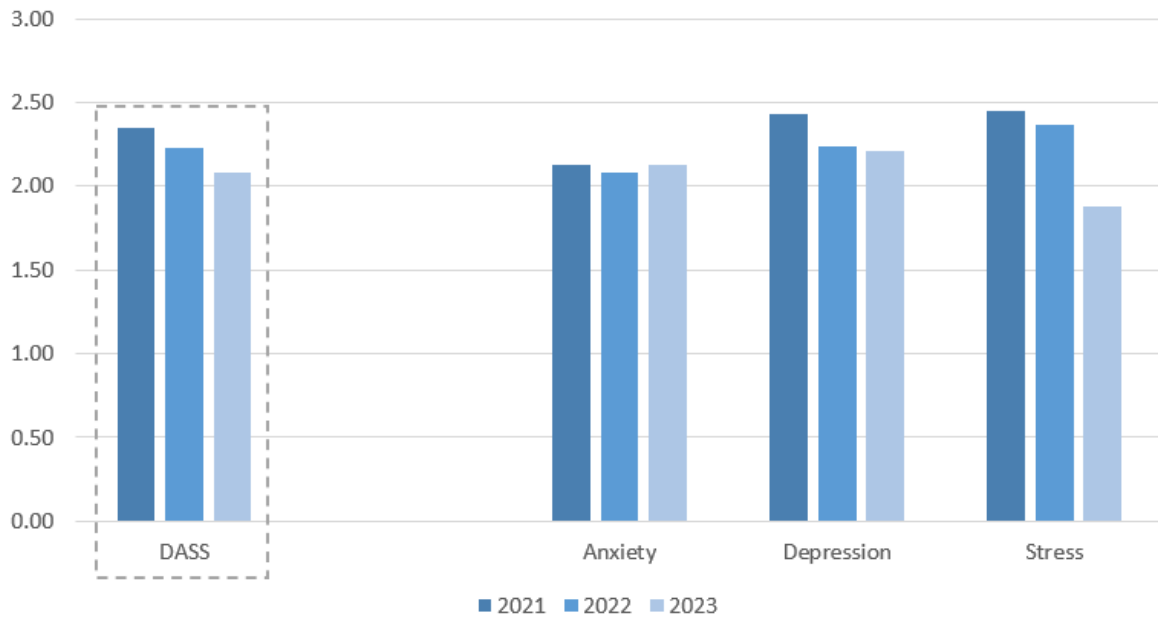
Figure 12 - Employee wellbeing-DASS: 2021 - 2023

Queensland fared comparatively well on Employee Wellbeing in relation to the other populous States, with Anxiety the only concern, which was higher only in News South Wales (see Figure 13).
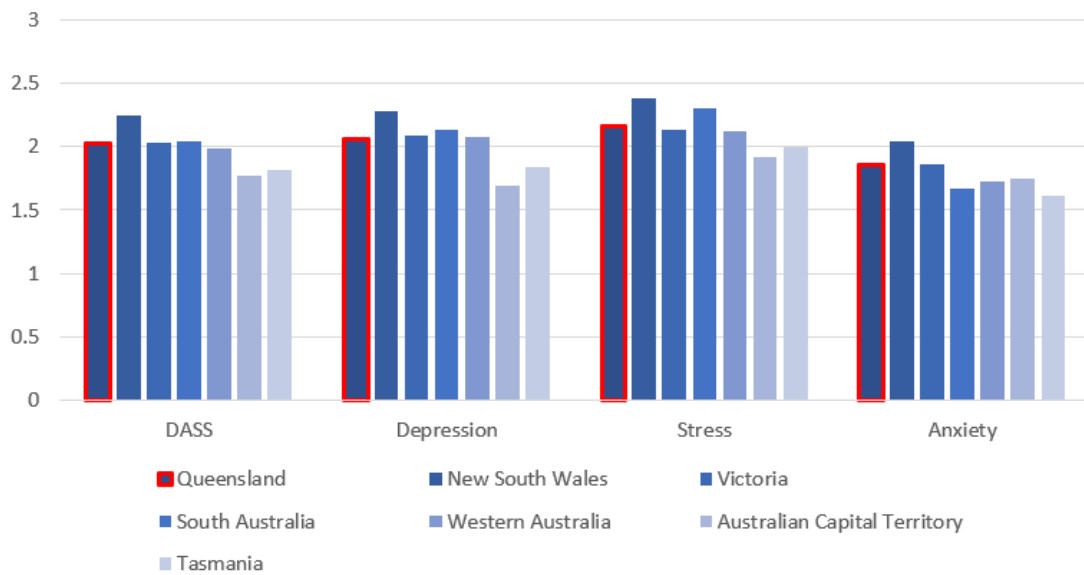
Figure 13 - Employee Wellbeing - State comparison[3]

3. Organisational resilience between 2021 and 2023

Regarding organisational resilience, consistent with the improvement in employee resilience, there is a positive change from 2021 to 2022, which declines again in 2023. The two predictors of organisational resilience (i.e., organisational change and organisational strategy) follow a similar trajectory (see Figure 14).
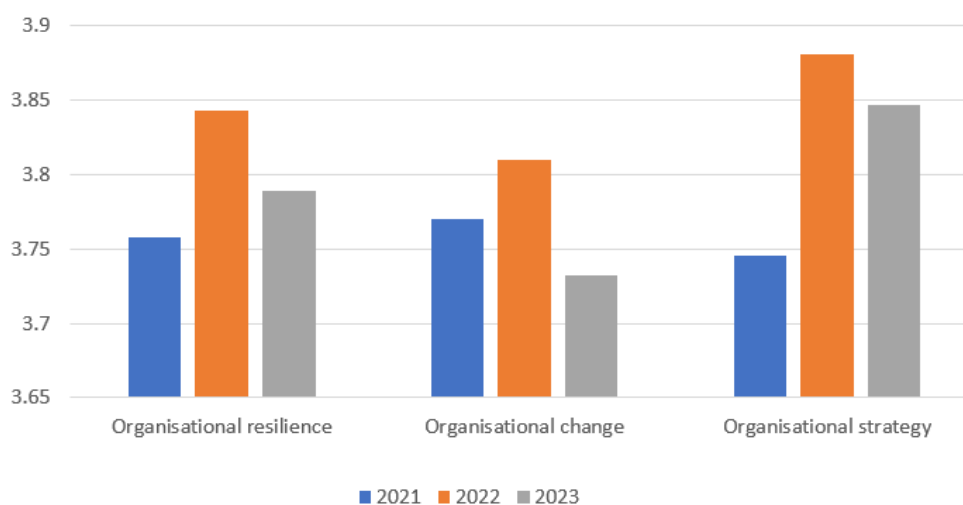
Figure 14 - Organisational Resilience and its predicators: 2021 – 2023

3 There are no survey responses from NT.

For cross-state comparison, Queensland has one of the lower levels of organisational resilience (see Figure 15).
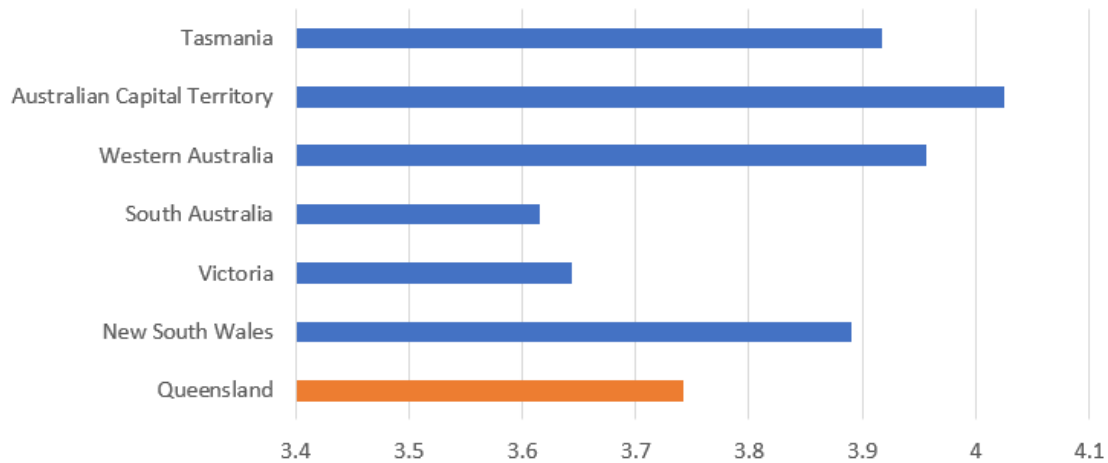
Figure 15 - Organisational Resilience - State comparison[4]

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. Tourism services comprise recreation and entertainment providers, tour operators and travel agencies, retail, and eco-tourism organisations. The survey captured data from many tourism sectors and allowed for rich inter-sector comparisons (see Figure 16). Nonetheless, in total, the survey received 87% of its responses from these three sectors.

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[4] There are no survey responses from NT.
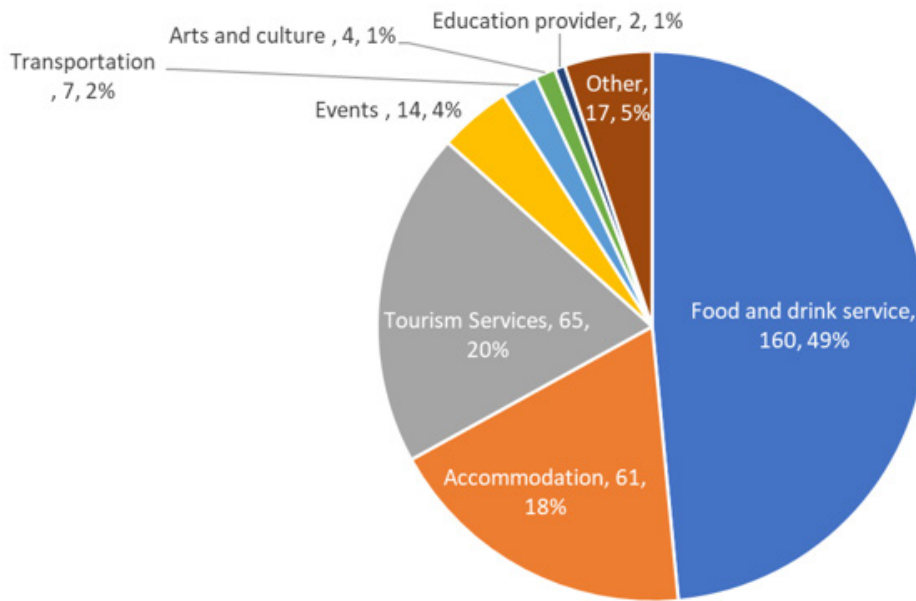
Figure 16 - Industry/Sector Summary (n, %)

Descriptive overview of three sectors

To better understand the sector characteristics, we explored gender, age, and education background distributions (see Table 12). 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 dominate all three sectors.
- Tourism service sector workers have a slightly higher level of education, with more than one third of them holding a bachelor's degree or equivalent.

	Accommodation N=61	Food and drink service N=160	Tourism service N=65	Total N=286
Age group				
18-25 years	6.7%	18.8%	9.4%	14.1%
26-35 years	25%	24.4%	18.8%	23.2%
36-45 years	25%	16.3%	20.3%	19.0%
46-55 years	25%	15.0%	20.3%	18.3%
56-65 years	11.7%	17.5%	15.6%	15.8%
Above 65 years	6.7%	8.10%	15.6%	9.5%
Gender				
Male	35.0%	43.8%	43.1%	41.8%
Female	65.0%	55.6%	53.8%	57.2%
Education				
High school junior or equivalent	10.0%	2.5%	3.1%	4.2%
High school senior or equivalent	31.7%	31.9%	21.5%	29.5%
Diploma/Trade qualification	31.7%	33.1%	36.9%	33.7%
Bachelor's degree or equivalent	16.7%	26.3%	27.7%	24.6%
Post-graduate degree or equivalent	10.0%	5.6%	9.2%	7.4%
Other	0%	0.6%	1.5%	0.7%

Table 12. Socio-demographic profile across sectors

Regarding job characteristics (see Table 13), we found that for employment status, accommodation and tourism service sectors employed proportionately more full-timers compared to the levels of contingent employment in food and drink service. Accommodation and tourism services also had more self-employed workers, like owner-operators. For tenure (years in tourism/hospitality industry), worker segments are evenly split across all experience levels. Most workers across all sectors have a relatively medium level of experience (i.e., between 3 to 10 years). In comparison, years at the current organisation are relatively short (i.e., less than 3 years).

	Accommodation N=61	Food and drink service N=160	Tourism service N=65	Total N=286
Years in tourism/hospitality industry				
Less than 3 years	21.7%	27.4%	16.9%	23.8%
Between 3 and up to 10 years	33.3%	25.5%	32.3%	28.7%
Between 10 and 20 years	21.7%	27.4%	26.2%	25.9%
More than 20 years	23.3%	19.7%	24.6%	21.6%
Years at the current organisation				
Less than 3 years	48.3%	50.3%	32.3%	45.7%
Between 3 and up to 10 years	30.0%	35%	35.4%	34.0%
Between 10 and 20 years	15.0%	9.6%	20.0%	13.1%
More than 20 years	6.7%	5.1%	12.3%	7.1%
Employment status				
Full-time	58.3%	44.4%	53.8%	49.5%
Part-time	26.7%	26.3%	15.4%	23.9%
Casual	13.3%	25.6%	13.8%	20.4%
Volunteer	-	-	9.2%	2.1%
Unemployed	-	-	1.5%	0.4%
Self-employed	1.7%	3.8%	4.6%	3.5%
Work Hours (weekly)				
Less than 20 hrs	16.7%	31.9%	24.6%	27.0%
21 to 40 hrs	61.7%	48.8%	58.5%	53.7%
41-60 hrs	18.3%	17.5%	15.4%	17.2%
Above 60 hrs	3.3%	1.9%	1.5%	2.1%

Table 13. Job characteristics profile across sectors

Regarding organisation characteristics (see Table 14), all sectors were dominated by organisations with more than 11 operating years, especially for tourism services, where most organisations have operated for more than 20 years. In terms of the size of the organisation, overall, SMEs dominated all sectors, with food and drink and tourism service sectors having more small-sized organisations and accommodation and tourism services having more medium-sized organisations.

	Accommodation N=61	Food and drink service N=160	Tourism service N=65	Total N=286
Organisation operating years				
Less than 1 year	1.8%	1.3%	0%	1.1%
1-2 years	1.8%	8.5%	0%	5.2%
3-4 years	5.3%	18.3%	1.7%	11.9%
5-10 years	26.3%	22.9%	25.4%	24.2%
11 to 20 years	35.1%	19.0%	16.9%	21.9%
20 years or more	29.8%	31.10%	55.9%	35.7%
Organisation size				
Sole proprietorships & partnerships	3.6%	1.3%	4.7%	3.5%
1 to 4	12.5%	6.5%	6.3%	9.2%
5 to 19	30.4%	41.8%	29.7%	32.0%
20 to 199	37.5%	37.9%	39.1%	38.6%
> 200	16.1%	12.4%	20.3%	16.7%

Table 14. Organisation characteristics profile across sectors

Employee and organisational resilience

A sector comparative analysis regarding employee resilience and organisational resilience (see Figure 17) showed:

- Employee resilience in tourism service (Mean = 3.89) and food and drink (Mean = 3.89) service sectors is slightly higher than employee resilience in the accommodation sector (Mean = 3.81).
- Organisational resilience in the accommodation sectors (Mean = 3.79) and food and drink service sector (Mean = 3.88) was higher than in the tourism service sector (Mean = 3.69).
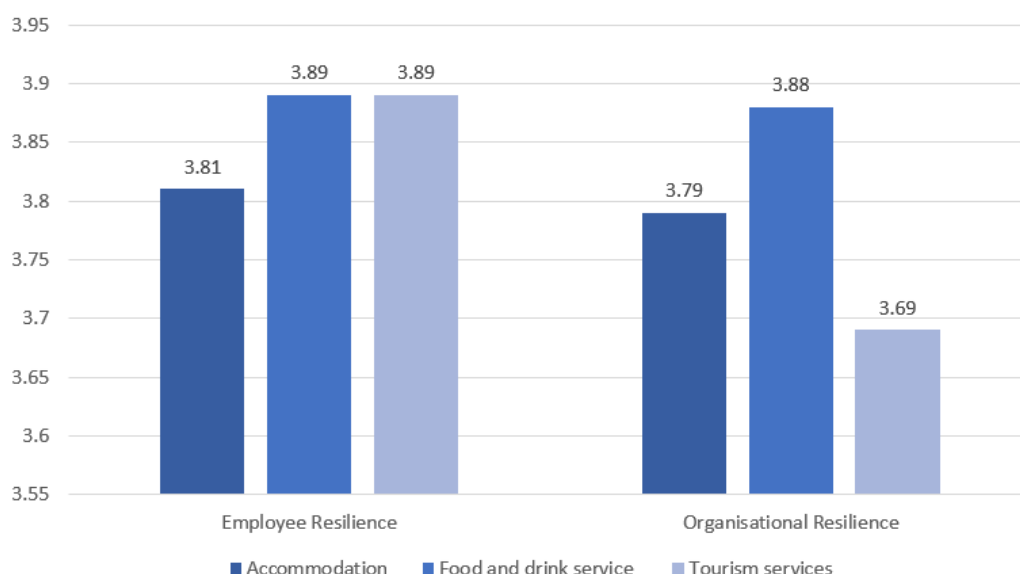
Figure 17 - Employee and organisational resilience across sectors

Employee wellbeing

The comparative analysis of employee wellbeing showed that employees in the tourism service sector experienced slightly more depression and anxiety, but less stress than the other two sectors. Overall, the well-being was worst in the tourism services sector (highest DASS).
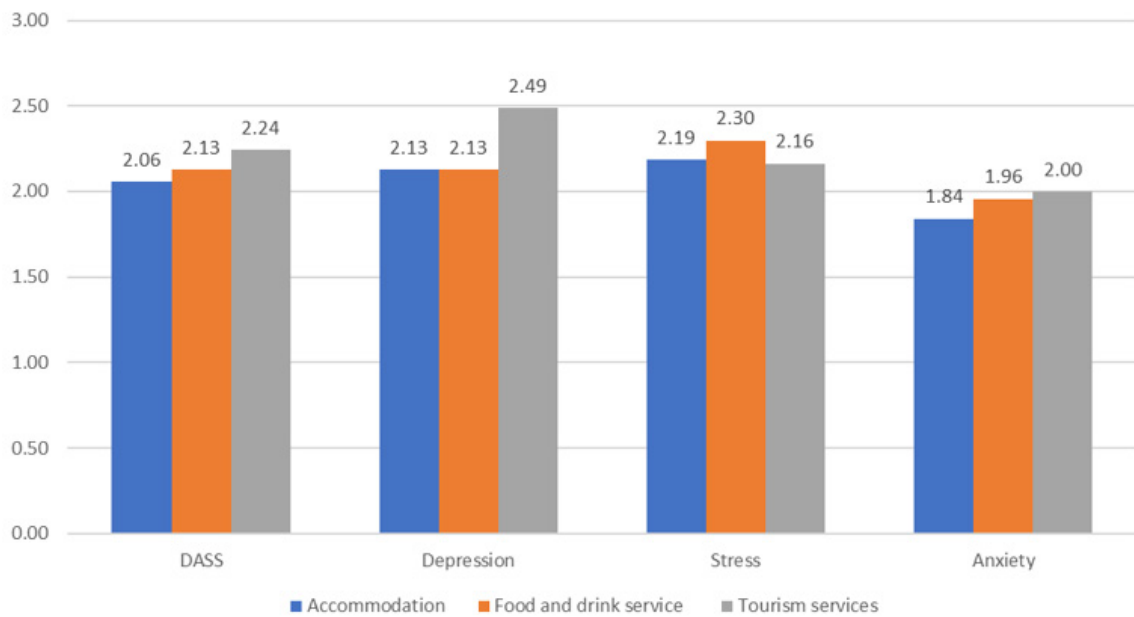
Figure 18 - Employee wellbeing across sectors

2023 TOURISM WORKFORCE REGIONAL SUMMARY

GOLD COAST REGION

On the 29th of August 2023, 16 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 three key questions.

KEY FINDING #1 Tourism workforce changes

- While staff were available, there remains a shortage of adequately experienced, trained and skilled workers
- Lack of skilled workers negatively impacting service quality
- Operators attempt to retain workers through training and offering management opportunities to foster careers
- Workers have increased power to negotiate higher salaries or other benefits
- Operators face challenges retaining volunteers
- Some underemployed cohorts not as attracted to Queensland as previously
- Limited opportunities for intergenerational knowledge transfer between workers

KEY FINDING #2 Ongoing structural issues

- Cost of living pressures, alongside housing shortages and limited availability, leading to staff retention issues
- Negative perceptions of the industry limiting attraction of workers
- Specialist training, for example marine tourism, is not always available in the region
- Industrial reforms are negatively impacting operators
- Operators are cognisant of the need to diversify offerings
- Reduced international airline capacity and increased cost of living for domestic travellers has deflated the market

KEY FINDING #3 Reflections on decision-making & the pandemic

- Some operators regret firing or standing down employees
- Vaccination mandates meant operators needed to fire some workers
- Some short-term policy decisions had unexpected consequences in the long-term
- Participants were appreciative of the benefits of JobKeeper
- Enforcement of COVID related policies was traumatic for some workers – who have since left the industry
- Optimism in 2022 which was considered a contributor to organisational resilience, has since faded
- Successful operator pivots during the pandemic have led to increased organisational resilience
- Operators have renewed appreciation for seasonality of the market

KEY FINDING #4 Survey regional highlights

- From 2021 to 2022, employee resilience and organisational resilience in the Gold Coast region showed a slight increase. In 2023, both resilience types decreased below 2021 levels.

Gold Coast Region (2021 - 2022 - 2023)
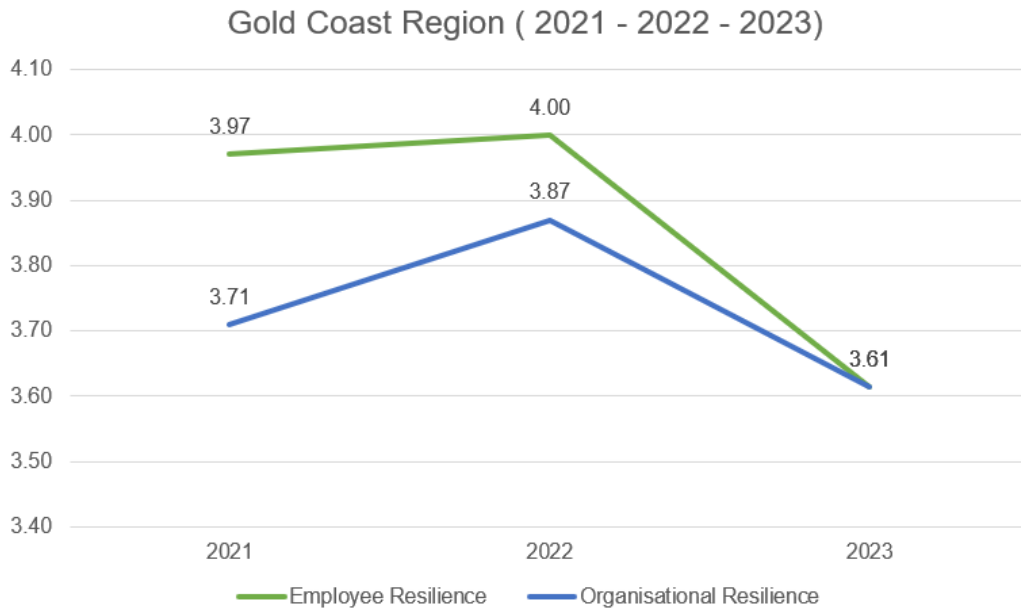
- From 2021 to 2022, employee wellbeing declined, evidenced by a significant increase in all three dimensions of the depression, anxiety, and stress scale (DASS), especially for anxiety. In 2023, employee well-being recovered beyond 2021 levels. Anxiety however remains at an all-time high.
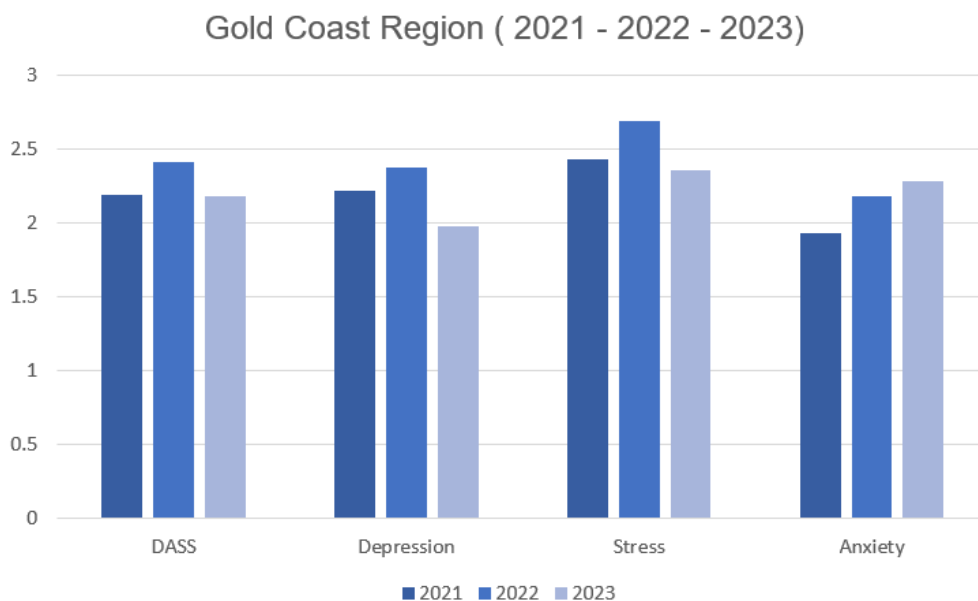
Gold Coast Region (2021 - 2022 - 2023)

- From 2021 to 2022, at the meso-level, tourism workers perceived a significant improvement in organisational learning culture (Mean = 3.72 for 2022, Mean = 3.19 for 2021); and at the micro-level, they feel more empowered (Mean = 3.91 for 2022, Mean = 3.65 for 2021). However, both factors declined in 2023. In 2023, employees feel less empowered then in 2021 (Mean = 3.53). Organisational learning has declined to a mean of 3.32.

Gold Coast Region (2021 - 2022 - 2023)
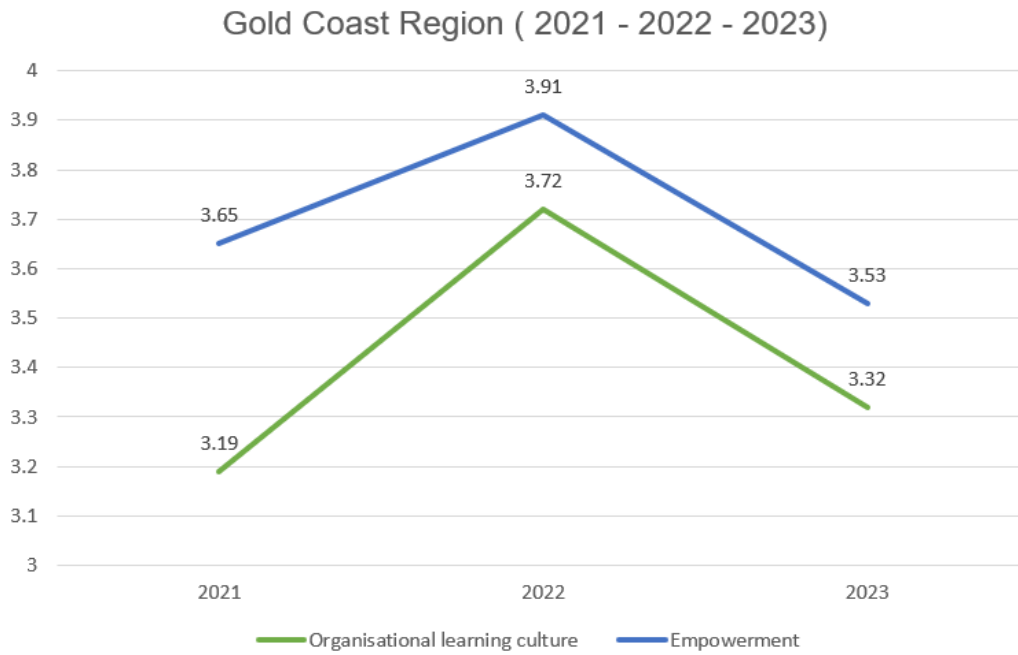
TROPICAL NORTH QUEENSLAND REGION

On the 5th of September 2023, 23 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 three key questions.

KEY FINDING #1 Tourism workforce changes

- Skill shortages continue
- Employees are more selective about where and how they want to work
- Unemployment rates are higher, though industry faces ongoing challenges to attract underemployed cohort

KEY FINDING #2 Ongoing structural issues

- Housing availability and affordability a constant issue
- Insecurity and lack of flexibility negatively affecting staff turnover and retention
- Negative perceptions and misconceptions of the industry are an impediment to recruiting workers
- Limited training opportunities, competing priorities, and lack of accountability from operators, organisations, and governments leading to employee churn
- Industry faces challenges attracting workers from comparative industries like health, disability, social services, and agriculture
- Operators see industrial reforms as complex and unnecessary

KEY FINDING #3 Reflections on decision-making & the pandemic

- Recognition that making people redundant was sometimes a mistake
- Remaining employees are required to take on additional responsibilities – leading to overwork
- Affected workers have since moved on to other industries
- Allowing some workers to work from home has led to inequities amongst workers
- COVID was a missed opportunity to institute mentoring programs and other transfer of knowledge
- Policy decisions were seen as rushed, leading to unexpected consequences
- Recognition that disenfranchised groups, like international students, have been treated poorly
- Distribution of JobKeeper was seen as problematic
- There was a belief that vaccine mandates were polarising and limited opportunities for some workers, and subsequently, operators
- Collaborative approaches were seen as advantageous - leading to organisational resilience
- Some operators simplified their offerings to remain affordable to consumers – leading to organisational resilience
- Less prevalent roles, like tour guides, language guides, and AV operators, felt underrepresented and underfunded by policymakers

KEY FINDING #4 Survey regional highlights[5]

- From 2021 to 2022, overall, employees and their organisations in the Tropical North Queensland region become more resilient. However, in 2023 resilience fell beyond 2021 levels.
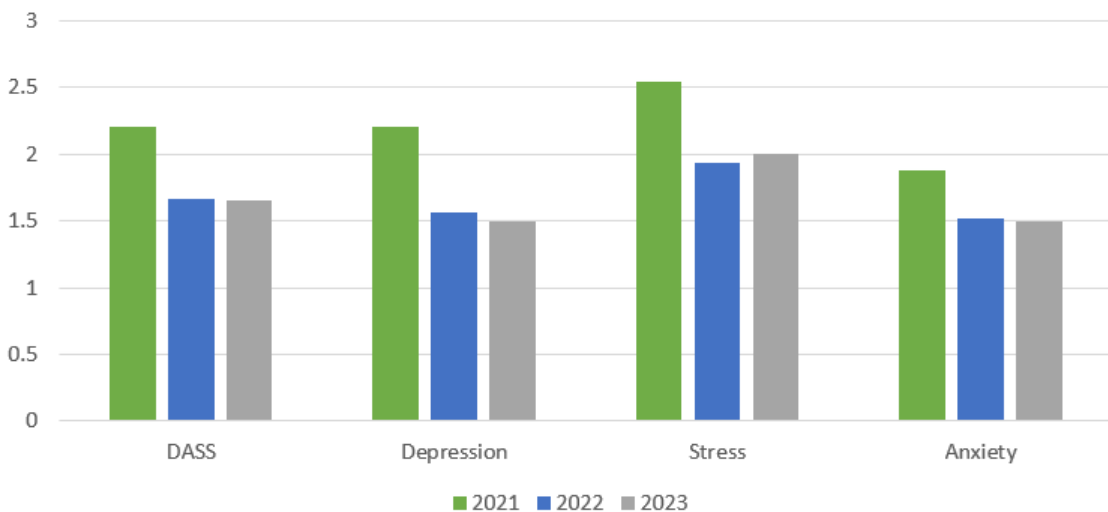
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5 Findings are only indicative due to small sample size

Tropical North Queensland Region (2021-2022-2023)
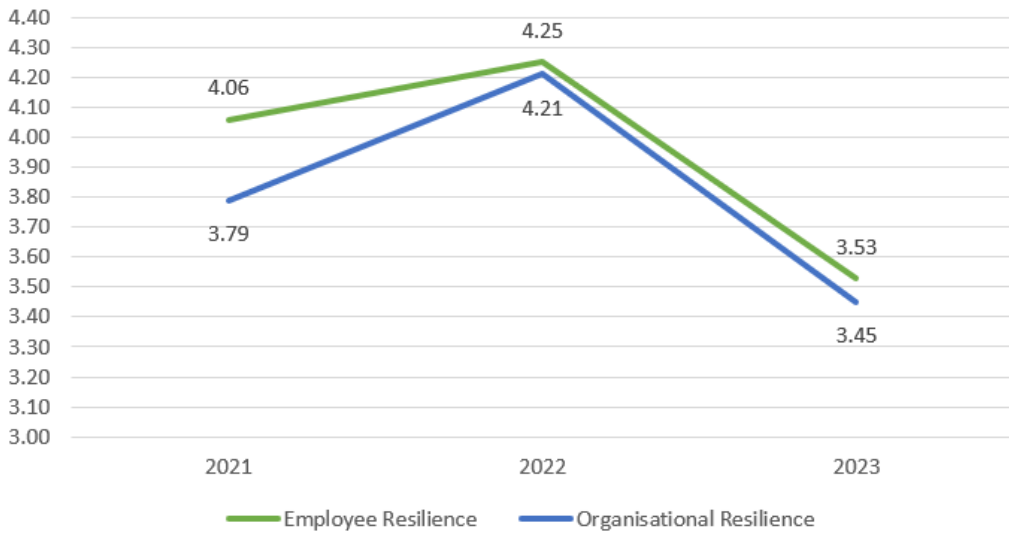
- From 2021 to 2022, employee wellbeing in this region has improved, evidenced by a reduced level in all three dimensions of DASS. Levels remained constant in 2023.

Tropical North Queensland Region (2021-2022-2023)

- Improvements have been observed in organisational learning culture at the meso-level from 2021 to 2022 (Mean = 3.23 for 2022, Mean = 3.73 for 2021) and sense of empowerment at the micro-level from 2021 to 2022 (Mean = 4.20 for 2022, Mean = 4.67 for 2021). However, in 2023 both indicators declined below 2021 levels.

Tropical North Queensland Region (2021-2022-2023)
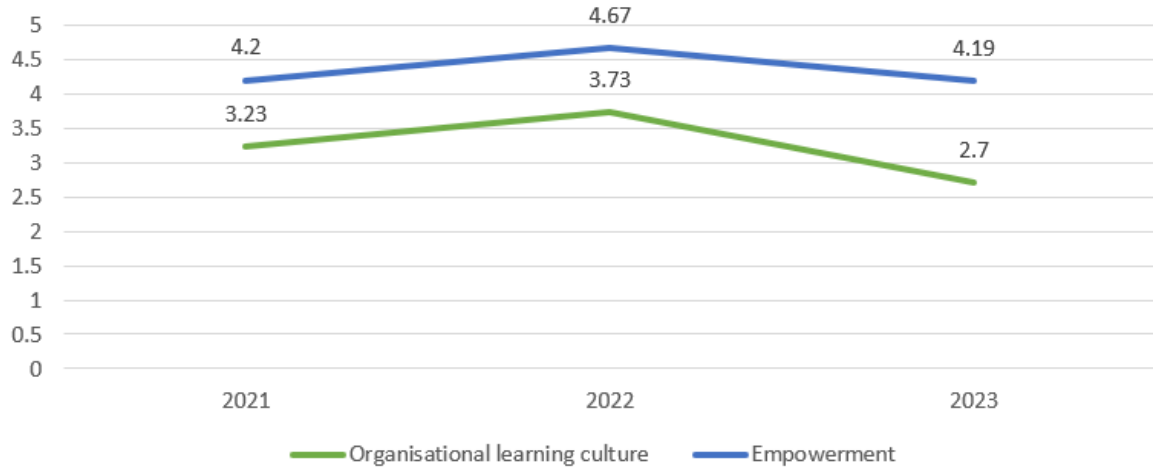
OUTBACK QUEENSLAND REGION

On the 15th of August 2023, 13 tourism employees, operators and stakeholders from the Outback Queensland region participated in an online 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 three key questions.

KEY FINDING #1 Tourism workforce changes

- Skilled labour shortage continues
- While the return of backpackers was a welcome relief, there was consensus that they were over relied on
- More experienced older couples were also working in the region
- Post-COVID, some young professions were attracted to the region as they could not find work in urban centres
- There was more stability in workforce, with less turnover
- However, turnover of casual staff was still high
- Retention of youth in-region remains an ongoing concern

KEY FINDING #2 Ongoing structural issues

- Housing availability and affordability: many businesses need to source their own properties for staff
- Travellers who are self-sufficient in caravans are easier to accommodate
- Living cost increases mean people looking for full-time work over casual
- Seasonality of tourists still causing challenges
- Diversification was considered important for all industries (including Tourism) in Outback Queensland, to promote a high quality of life for the residents

KEY FINDING #3 Reflections on decision-making & the pandemic

- Some participants found positive outcomes from the pandemic, allowing volunteers and staff time to rest and complete outstanding projects
- COVID-19 Pandemic Event Visa been beneficial in allowing backpackers to stay in region

KEY FINDING #4 Survey regional highlights[6]

- 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. In 2023, both types of resilience declined. Organisational resilience declined beyond 2021 levels.

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[6] 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.

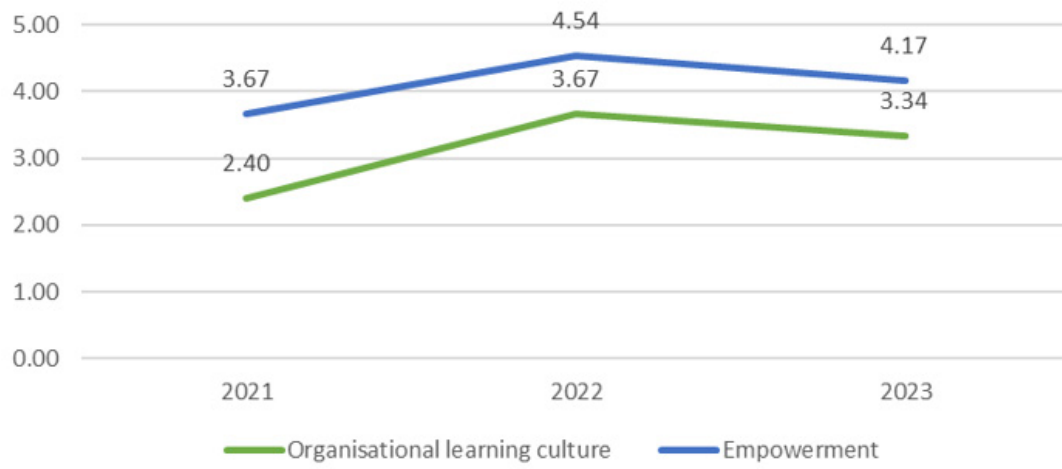Outback QLD and Southern QLD country (2021-2022-2023)
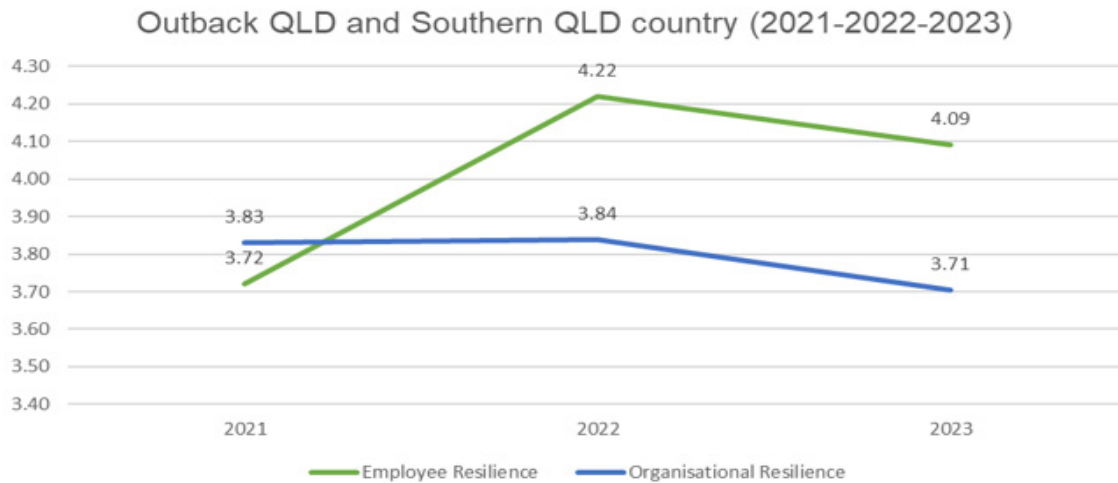
- From 2021 to 2022, employee wellbeing in this region has declined as employees feel more depressed and more anxious. In 2023, levels declined for all wellbeing indicators, apart from anxiety.
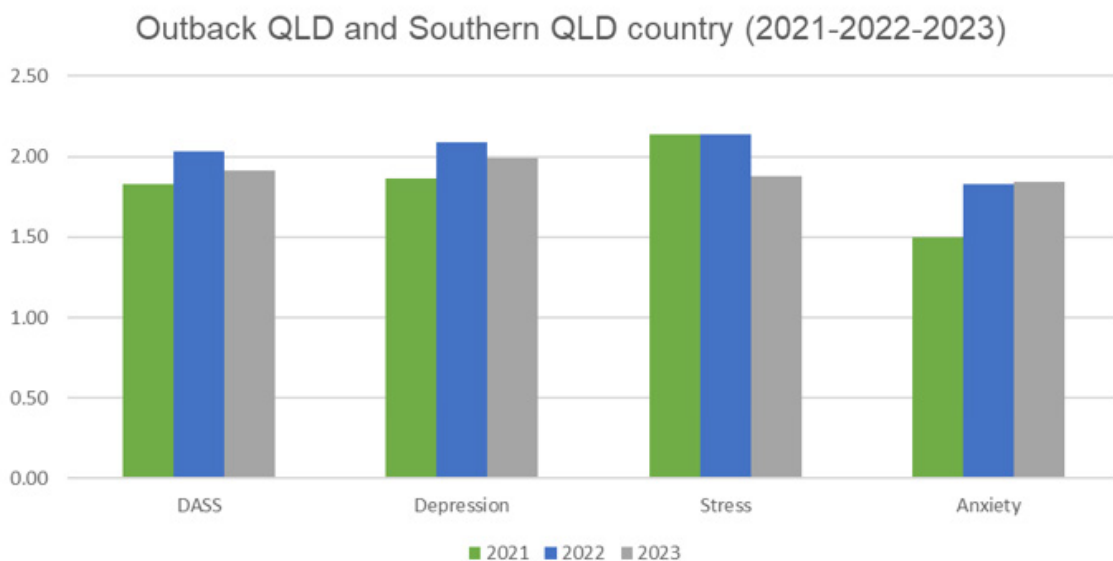
Outback QLD and Southern QLD country (2021-2022-2023)

- 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). Whilst figures declined from 2022 to 2023, they kept above 2021 levels.

Outback QLD and Southern QLD country (2021-2022-2023)

Line chart showing two series across 2021, 2022, 2023:
- Organisational learning culture (green): 2.40, 3.67, 3.34
- Empowerment (blue): 3.67, 4.54, 4.17

Legend: —— Organisational learning culture —— Empowerment

SOUTHERN QUEENSLAND COUNTRY REGION

On the 24th of August 2023, 14 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 three key questions.

KEY FINDING #1 Tourism workforce changes

- Staff shortages continue
- Lack of skilled workers negatively impacting service quality
- Employers relying on migrant visa holders like Pacific Islanders and backpackers
- Regional drain remains an issue
- Some workers attracted to other opportunities in the labour market

KEY FINDING #2 Ongoing structural issues

- Housing availability and affordability: many businesses need to source their own properties for staff
- Budget renters, displaced from larger urban centres, are occupying accommodation that usually houses migrant and contingent workers
- Limited transportation is a challenge for workers
- Attracting and retaining underemployed cohorts is difficult
- Some operators believed welfare was too generous and impeded incentives to work for potential employees
- Infrastructure and planning issues, like land use, is considered an impediment to development of sufficient accommodation
- There was a recognition that connectivity with neighbouring regions can be improved
- There was also recognition that the destination lacked unity – meaning they were unable to meet customer expectations

## KEY FINDING #3 Reflections on decision-making & the pandemic

- Enforcement of COVID regulations had long-term negative impacts on staff
- Limited internet connectivity made enforcement of some regulations, like QR code check-ins, difficult
- Some pivots by operators were considered a positive influence on organisational resilience
- Mandatory vaccinations were considered inappropriate a hindrance to staff attraction
- Employee expectations on work conditions have shifted following the pandemic
- There is a nervousness and risk aversion around staging events
- The pandemic and global supply chain issues reiterated the need to connect with local suppliers

KEY FINDING #4 Survey regional highlights[7]

- From 2021 to 2022, employee resilience in Southern Queensland Country and Outback regions improved. In comparison, there is no significant change in organisational resilience. In 2023, both types of resilience declined. Organisational resilience declined beyond 2021 levels.
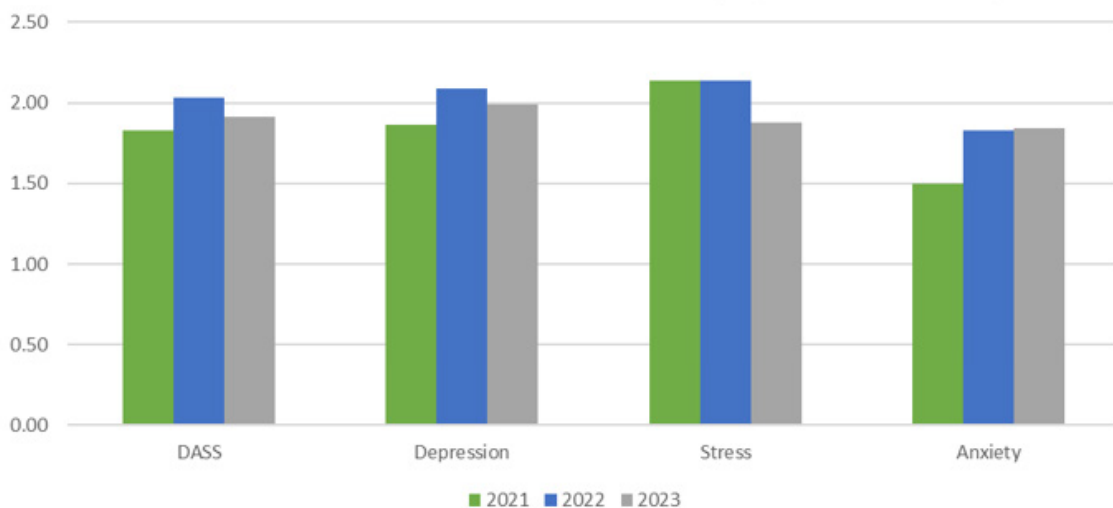
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[7] Given the small sample size for Southern Queensland Country and Outback Region in the survey, we combined these two regions for analysis to enhance meaningfulness of data.

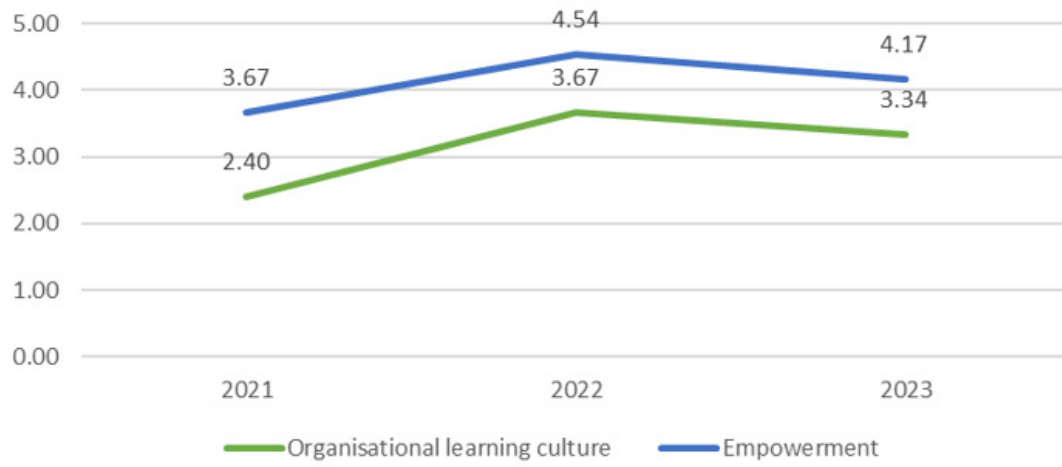Outback QLD and Southern QLD country (2021-2022-2023)
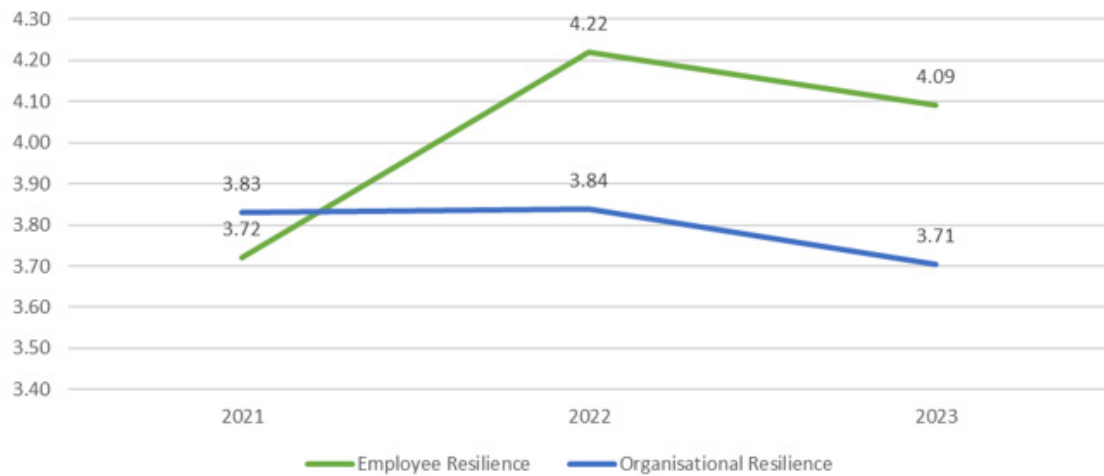
- From 2021 to 2022, employee wellbeing in this region has declined as employees feel more depressed and more stressed. In 2023, levels declined for all wellbeing indicators, apart from anxiety.

Outback QLD and Southern QLD country (2021-2022-2023)

- 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). Whilst figures declined from 2022 to 2023, they kept above 2021 levels.

Outback QLD and Southern QLD country (2021-2022-2023)

Line chart showing two series over 2021, 2022, 2023.

Organisational learning culture: 2.40 (2021), 3.67 (2022), 3.34 (2023)

Empowerment: 3.67 (2021), 4.54 (2022), 4.17 (2023)

Legend: — Organisational learning culture — Empowerment

WHITSUNDAYS REGION

On the 31st of August 2023, 7 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 three key questions.

KEY FINDING #1 Tourism workforce changes

- Job insecurity remains an ongoing issue
- Some operators were able to improve retention
- However local workers who usually filled seasonal roles like housekeeping have not returned
- Advertised positions are oversubscribed with applications, though many applicants are not suitable or disappear from the process

KEY FINDING #2 Ongoing structural issues

- Housing availability and affordability hampering attraction and retention
- Inconsistency of the visitor market, e.g., trip cancellations, negatively impacting the workforce
- Staff shortages meant some operators had to cancel trips for prospective visitors as boats were unmanageable
- Increased costs, particularly insurance premiums, challenged abilities of operators
- Some operators thought government regulations were overly restrictive
- High staff turnover negatively impacted organisational resilience
- Some operators were overworked and did not consider it appropriate to take leave

KEY FINDING #3 Reflections on decision-making & the pandemic

- Some operators bought or leased "crew houses" to support employees with accommodation – with mixed results and financial burdens
- Some operator pivots during the pandemic led to improved organisational resilience
- Vaccine mandates led to loss of skilled staff
- Some considered welfare programs, like JobKeeper, an impediment to staff recruitment
- Other policies, like "Work in Paradise" were considered ineffective

KEY FINDING #4 Survey regional highlights[7]

- In 2021 survey, we did not receive any responses from Whitsundays or its neighbouring regions. Similarly, in 2023 respondent numbers were too low to provide a meaningful cross-time comparative analysis. Instead, a regional comparison of Northern Queensland (Tropical North Queensland, Townsville, Mackay and Whitsundays) to Central Queensland (Outback and Southern Queensland) and South East Queensland Coast (Sunshine Coast and Gold Coast) provides comparative insights.
- Employee resilience levels for North Queensland are comparable to employee resilience levels on the South East Coast. Organisational resilience levels are slightly lower. Central Queensland has the highest levels of employee resilience but lowest levels of organisational resilience.
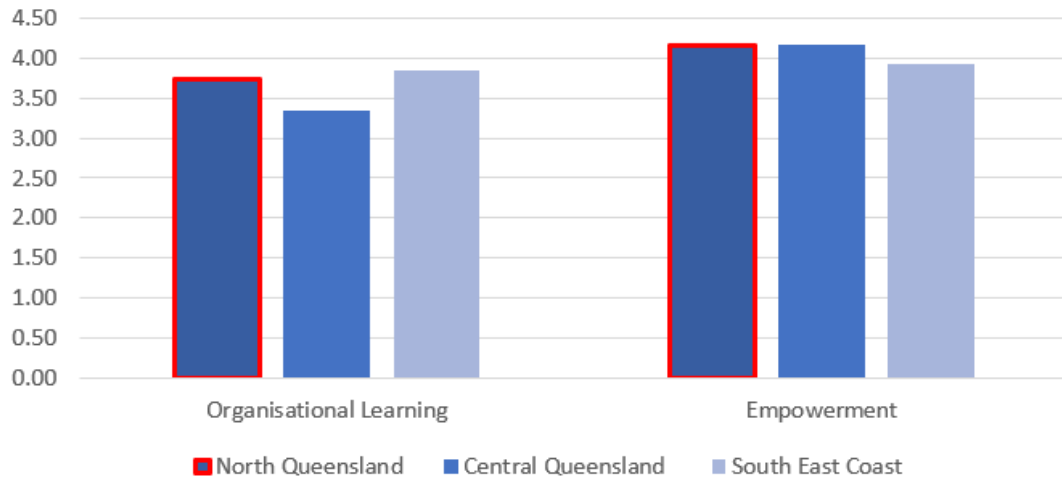
Resilience regional comparison
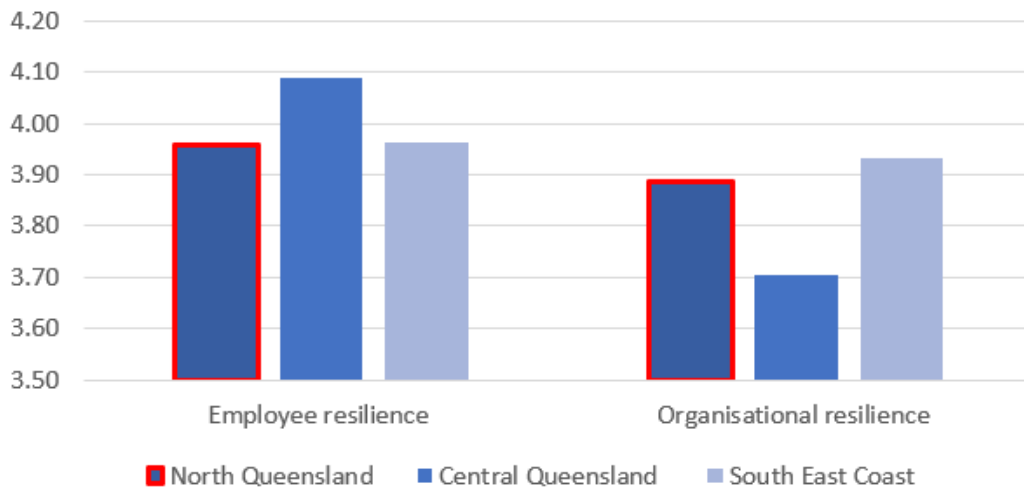
- For the most part Northern Queensland has the highest level of wellbeing as reflected in the lowest DASS, lowest levels of depression and anxiety. Stress levels are similar to Central Queensland.

Wellbeing regional comparison
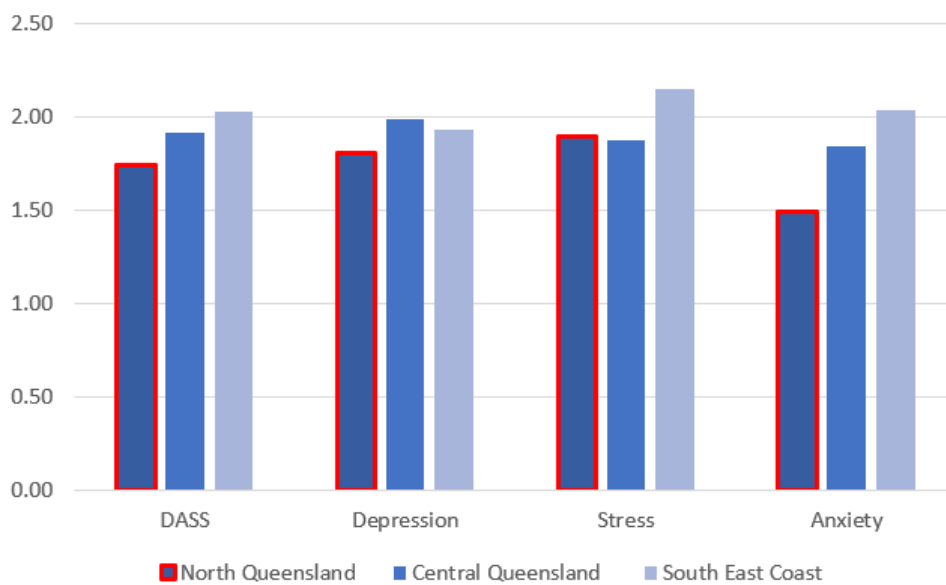
- On the micro level, employees feel most empowered in Northern Queensland. However, meso-level factors such as organisational learning are lower compared to the South East Coast.

Meso and micro level factors

Chart showing Meso and micro level factors comparing Organisational Learning and Empowerment across North Queensland, Central Queensland, and South East Coast.

Legend: North Queensland, Central Queensland, South East Coast

SUMMARY

Previous reports have culminated with a range of suggested policy and practice actions for workers, managers/operators, destinations, and policymakers. As this is the final report these suggested actions have been incorporated into the project's final output, the Queensland Tourism Workforce Resilience and Recovery Strategy, which was launched in a Webinar in October, 2023. The Strategy was designed with pull-apart accessible resource sheets for specific audiences, for example regions, of actor groups, be they workers, operators, or destinations and these can also be accessed on the above link. In parallel to the development of the six reports and the final Strategy, numerous academic-focused outputs were produced, to have the research validated in the review process by expert peers. This process continues and any further significant discoveries in our data will be shared via QTIC communications.

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Acknowledgements