



Hospitality on the Horizon

Queensland Hospitality
Industry Environmental Scan

August 2024



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Thank you

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Project objective and scope

This environmental scan provides a comprehensive analysis of Queensland's hospitality industry, focusing on current business structures, labour market, workforce skills and emerging trends. By examining key opportunities and challenges, this project seeks to identify critical gaps and anticipate future skill requirements. Additionally, this environmental scan explores potential strategies for workforce attraction and retaining and upskilling the existing workforce.

The hospitality industry is defined as the ANZSIC class of activities listed in Table 1 which also includes the major occupations associated with the hospitality industry. While there are other occupations that work in the hospitality industry, for example, security guards, accountants and delivery drivers, this environmental scan focusses on the most significant occupations.

Table 1 | Hospitality industry scope

| ANZSIC division | ANZSIC class | ANZSCO occupation group | ANZSCO occupation |
|--|---|---|--|
| Division H Accommodation and Food Services | Subdivision 45 Food and Beverage Service: | 1 Managers | 1411 Café and restaurant managers 1414 Licensed club managers |
| | 4511 Cafes and Restaurants | 3 Technicians and Trade Workers | 3513 Chefs 3514 Cooks |
| | 4520 Pubs, Taverns and Bars | 4 Community and Personal Service Workers | 4311 Bar attendants and baristas 4312 Café workers 4314 Hotel service managers 4315 Waiters 4319 Other hospitality workers |
| | 4530 Clubs (Hospitality) | | |
| | | 8 Labourers | 8513 Kitchenhands |
| | | | |
| Division G Retail Trade | 4123 Liquor Retailing | | |
| Division R Arts and Recreation Services | 9201 Casino Operation | 4 Community and Personal Service Workers | 4313 Gaming workers (noting that occupations listed above would also work in casinos) |

This environmental scan provides a historical and point in-time reference and will serve as a foundational reference to guide any future industry consultations and workforce planning activities, ensuring the sustainable growth and development of the hospitality sector in Queensland.

Executive summary

Queensland's hospitality industry continues to recover from the significant impacts of the COVID-19 pandemic. The challenges experienced during the peak of the pandemic have reshaped the industry landscape, leading to significant labour exits from the sector and diminished interest among potential entrants domestically. Attracting and retaining a skilled workforce remains the primary and biggest ongoing challenge faced by the industry.

Accommodation and food services is the sixth largest employer in Queensland, employing almost 200,000 people, many of whom work in regional areas. There is a strong connection between the strength and buoyancy of the hospitality industry and local regional economies.

For instance, a downturn in the hospitality industry can have broader ramifications for the regional supply chain, affecting food suppliers, printers, cleaners, security and other related businesses.

Employment in the industry is primarily part-time (53.9 per cent) and is currently experiencing labour shortages, particularly in skilled positions such as chefs, cooks and to a lesser extent, managers.

The level of earnings across hospitality industry occupations is below the median earnings, potentially placing the industry at a competitive disadvantage in attracting prospective workers and retaining staff. As the Queensland unemployment level continues to be at a historical low, hospitality employers are facing strong competition for labour from other industries that provide higher remuneration.

Efforts to train and expand the domestic workforce continue but have not kept pace with demand and population growth. Consequently, the accommodation and food services industry (hospitality), has the largest share of migrants in its workforce.¹ Australian Government amendments to migration policies will refocus attention on growing the domestic workforce.

The housing crisis is also having a profound impact on attracting a skilled workforce especially into regional areas, where attracting staff is already challenging; finding suitable accommodation further complicating the task, highlighting the need for industry and regions to continually focus on 'grow your own' upskilling initiatives where possible to support locals obtain good jobs locally.

Reports of 'worker abuse', long, hard, after-hours work with 'poor pay' has also left the industry with an image problem affecting the attraction of staff.² Staff shortages have created challenges for hospitality businesses, some of whom report reducing their operating hours in peak periods or even closing due to lack of staff.³

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1. Mackey, W., Coates, B., and Sherrell, H. (2022). *Migrants in the Australian workforce: A guidebook for policy makers*. Carlton: Grattan Institute. <https://grattan.edu.au/wp-content/uploads/2022/05/Migrants-in-the-Australian-workforce.pdf>
 2. Australian Hotels Association (AHA) and Accommodation Australia (AA). (2024). *Submission to Jobs & Skills Australia on the Draft Core Skills Occupations List (CSOL)*. Sydney: Australian Hotels Association. <https://aha.org.au/wp-content/uploads/2024/06/2024-AHA-AA-Core-Skills-List-JSA.pdf>
 3. Bronotte, M. (2023). *The 7 biggest current issues in the Hospitality industry in 2023*. Australia: Torrens University Australia. <https://www.torrens.edu.au/stories/blog/hospitality/current-issues-in-the-hospitality-industry>

The rising cost of living is placing considerable strain on employers, most of whom are small businesses. Overhead costs such as rent, tax, insurance and energy bills are contributing to their financial pressures. Businesses are trying to control costs through a range of measures that include adjusting menus due to the rising price of ingredients, offering casuals fewer shifts and reducing opening hours.

Innovations such as mobile booking platforms, QR code ordering, and other digital technologies such as restaurants running orders through food delivery apps and services have been used to capitalise on these new opportunities, sustain operations with existing staff and respond to customer needs.⁴

While hospitality spending declined during the pandemic, the industry pivoted to service the home delivery market. When restrictions relaxed,

the industry bounced back but was hampered by staff shortages as people had left hospitality to seek certainty of income. Labour shortages acted as a drag on the industry and then rising inflation exacerbated challenges due to supply costs and reduced consumer's discretionary spending.

Despite the challenges, the hospitality industry continues to display its resilience and innovation and the ability to act as a cornerstone of society's social and community fabric. The outlook for Queensland shows that the hospitality industry will continue to see growth in employment and there are many and varied job options and career opportunities that can be promoted to prospective staff.⁵

This environmental scan has identified three key areas for further investigation which are detailed at the end of this report.



Undertake further labour supply research - to better understand how to improve the industry's ability to diversify the pool of potential workers.



Challenge the myths about industry - to help potential workers understand the opportunities available across the industry and promote hospitality businesses as an employer of choice.



Explore training options - to help improve the responsiveness of the training sector and products to employers' needs and ensure workers have the skills they need to prosper in the workplace.

4. Bronotte, M. (2023). *The 7 biggest current issues in the Hospitality industry in 2023*. Australia: Torrens University Australia. <https://www.torrens.edu.au/stories/blog/hospitality/current-issues-in-the-hospitality-industry>

5. Jobs Queensland. (2023). *Anticipating Future Skills Series Four*. Ipswich: Queensland Government. <https://jobsqueensland.qld.gov.au/anticipating-future-skills/>

Methodology

Jobs Queensland has conducted research using established and recognised information sources to create a profile of Queensland's hospitality industry.

This environmental scan examined workforce, labour market, business structure and education and skills data and trends over the past five years since 2019.

The data was drawn from various sources and there are some limitations. At the industry level, some data sources could not be disaggregated beyond the Accommodation and Food Services Division, which includes Subdivision 44, Accommodation and Subdivision 45, Food and Beverage Service.

To better understand the employment patterns and trends of the hospitality industry, data at the occupational level was also reviewed. Occupational data was sourced from Jobs and Skills Australia (JSA) which draws on a range of Australian Bureau of Statistics (ABS) datasets. Not all JSA data is available at the state level.

Industry challenges, identified from reports, surveys, submissions, literature and news articles inform workforce development and planning activities for the hospitality industry in Queensland.

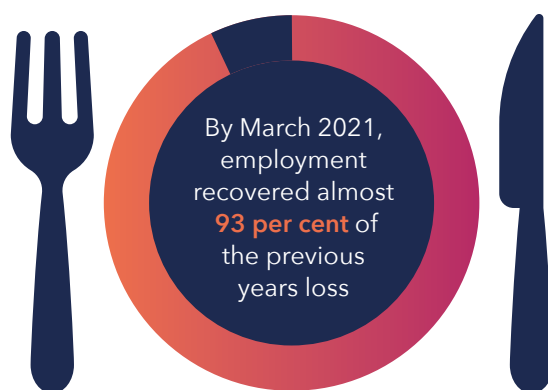
Introduction

The hospitality industry consists of a range of businesses including restaurants, pubs, clubs, taverns and bars, cafes, hotels and casinos. Although tourism and hospitality are distinct sectors, they are closely connected. Tourism drives demand for hospitality services, while the quality of hospitality offerings enhances visitor experiences. Domestic tourism has been a key driver of the industry's recovery following the COVID-19 pandemic, with Australians showing a strong appetite for domestic travel and leisure experiences.

In addition to the economic activity it generates, including through its complimentary role in supporting memorable tourism experiences, the hospitality industry is also a key contributor to the community providing hubs for social interaction and engagement. A vibrant hospitality industry is also vital to the liveability of regional Queensland acting as an important consideration for workers and their families when considering relocating for work.

Hospitality businesses play a vital role in driving activity in the Australian economy. In 2023, the annual revenue for cafes, restaurants and takeaway establishments hit almost \$64 billion in Australia.⁶ The industry not only generated substantial revenue but also provided extensive employment opportunities for a wide range of industry workers including chefs, cooks, bar attendants, baristas, waiters, café workers, kitchenhands and hotel, club and restaurant managers.

The diversity of businesses in hospitality also means there are a wide range of factors which affect everyday operations including labour supply, skills development, migration settings, workplace relations, industry licencing, compliance and input costs, including energy pricing.



6. Statista. (2024). *Annual revenue of cafes, restaurants, and takeaway food services in Australia from 2004 to 2023*. Global: Statista. <https://www.statista.com/statistics/653860/australia-cafes-restaurants-and-takeaway-food-services-turnover/>

In the past five years, since 2019, the industry has faced unprecedented challenges due to the COVID-19 pandemic. The pandemic had a major effect on the Australian hospitality industry with businesses facing multiple challenges such as lockdowns, supply chain disruptions, staff shortages and fluctuating demand. ABS figures show that accommodation and food services continued to be the most affected by job losses over the COVID-19 period.⁷ In the March 2020 quarter, accommodation and food services was the hardest hit sector with a 35 per cent drop in payroll jobs and in April 2020, overseas arrivals plummeted to just 21,000 from a record high 2.3 million in January 2020.

Staying Open: Future-Proofing Aussie Hospitality research analysed over 12 million shifts between January 2020 and October 2021, comparing them by generation, gender, state (including Queensland) and industry sector.⁸ The report found the hospitality industry had been transformed by the pandemic after experiencing an 80 per cent decrease in shift work hours in April 2020 due to nation-wide lockdowns. Generation Z (born 1996–2012) were the most affected and were forced to look for other jobs, with many not returning to the industry. Into 2021, hospitality businesses rostered 30 per cent less shift work hours compared to pre-pandemic levels of business operations, Baby Boomers (born 1946–1964) working in restaurants were the most affected. However, a boom in domestic travel in Queensland due to international travel bans, resulted in shift work in the state in 2021 exceeding pre-pandemic levels (see Appendix 1).

The effects of the pandemic were compounded due to a backdrop of global uncertainty affecting supply chains and domestic economic strain. More recently, increased inflation, combined with the rising cost of housing, has seen falls in consumer spending leading to reduced profitability and the closure of some hospitality businesses.

Staffing shortages remain the critical challenge facing the industry according to more than 80 per cent of respondents in the Jones Lang Lasalle (JLL) Hotels and Hospitality's inaugural Australian Operator Sentiment Survey. The Australian Chamber of Tourism Executive Chair John Hart was quoted in October 2023 stating that the hospitality worker shortage was Australia wide with the industry struggling in the skilled staff area, particularly cooks and chefs.⁹ Chefs are listed in the top 20 on the Australian skills shortages list.

Labour shortages do not only affect business operations. The inability to employ skilled and experienced staff can lead to reduced service standards for some consumers, which can lead to bad reviews and word-of-mouth criticism resulting in reputational damage.¹⁰ Forty per cent of diners have complained of a lack of, or poorly trained, staff.¹¹

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7. Australian Bureau of Statistics. (2021, March 16). *Weekly Payroll Jobs and Wages in Australia, Week ending 27 February 2021*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/jobs/payroll-jobs/week-ending-27-february-2021>
 8. Deputy Newsroom. (2021). *Staying Open: Future-Proofing Aussie Hospitality*. Australia: Deputy Newsroom. <https://news.deputy.com/new-report-reveals-the-pandemics-impact-on-australias-hospitality-industry-what-the-road-to-recovery-entails>
 9. Lucas, R. (2023, October 31). *Worker shortages plagues hospitality industry, 'low wages', insecure casual work cited as factors*. ABC News. Australia. <https://www.abc.net.au/news/2023-10-31/hospitality-industry-desperate-for-workers/103026688>
 10. ResDiary. (2024). *Australian Hospitality Statistics*. Glasgow: ResDiary. <https://resdiary.com/blog/2024-hospitality-industry-statistics-in-australia?region=APAC>
 11. Ibid.

At a glance



In June 2023, there were **10,836 hospitality businesses** in Queensland

87.6% were **small businesses** employing less than **20** people



Kitchenhands, bar attendants, baristas and waiters account for more than

60% of employed **hospitality workers**



More than 50% of those whose main job was in the accommodation and food services industry were located in the **Gold Coast and Sunshine Coast regions**



82.2%

The majority of hospitality businesses were **cafes and restaurants**



Skills shortages have been experienced, particularly for chefs and cooks



Weekly full-time earnings for hospitality occupations were **lower than the national median**

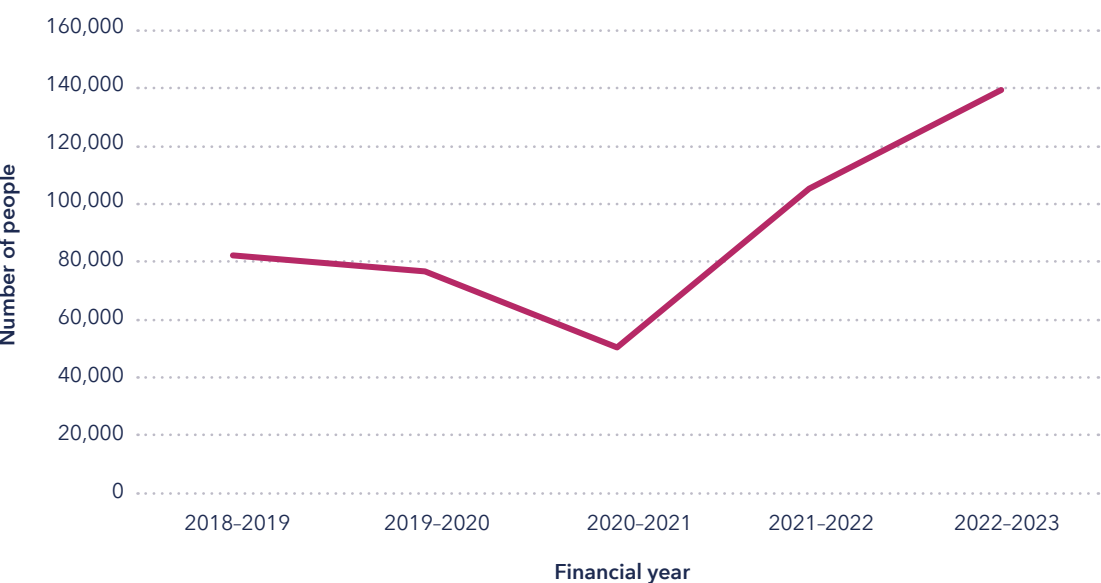
Queensland context

This section provides a snapshot of the context in which the hospitality industry is operating in Queensland.

Population growth

Each year between 2018-2019 and 2022-2023, Queensland’s population growth rate has exceeded that of Australia and the net population growth accelerated from 105,127 people in 2021-2022 to 139,479 in 2022-2023, as shown in Figure 1.¹²

Figure 1 | Net population growth, Queensland, 2018-2019 to 2022-2023



Source: Australian Bureau of Statistics. (2024, 21 March). *National, state and territory population, Table 2 Population growth and growth rate*. Canberra: Australian Government.

In December 2023, the major contributor to population growth in Queensland was net overseas migration, as shown in Figure 2.¹³ The Queensland Government anticipates population growth to increase to 2.5 per cent in 2023-2024 reflecting

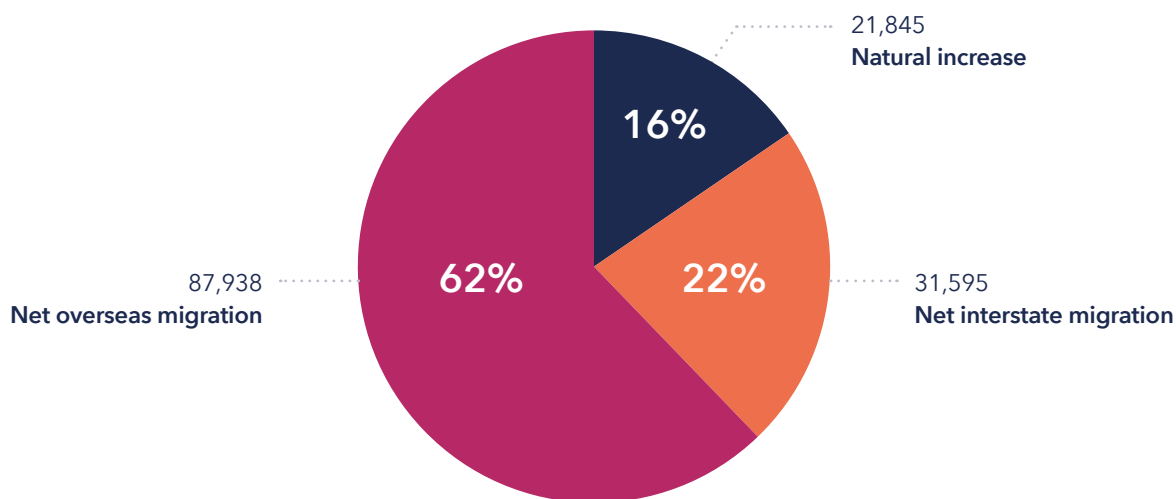
the elevated levels of net overseas migration. Growth is then projected to slow to 1.5 per cent in both 2024-2025 and 2025-2026 as net overseas migration normalises.¹⁴

12. Australian Bureau of Statistics. (2024, 21 March). *National, state and territory population, Table 2 Population growth and growth rate*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/people/population/national-state-and-territory-population/sep-2023>

13. Australian Bureau of Statistics. (2024, 13 June). *National, state and territory population*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/people/population/national-state-and-territory-population/latest-release>

14. The State of Queensland (Queensland Treasury). (2024). *Queensland Budget 2024-25, Economic and Fiscal Overview*. Brisbane: Queensland Government. <https://budget.qld.gov.au/overview/economic-and-fiscal-overview/#:~:text=Following%20growth%20of%202.3%20per%20growth%20in%20public%20infrastructure%20investment>

Figure 2 | Components of annual population growth, Queensland, year ending December 2023



Source: Australian Bureau of Statistics. (2024, 13 June). *National, state and territory population*. Canberra: Australian Government.

Economic activity

Following growth of 2.3 per cent in 2022-2023, Queensland's overall economic growth is forecast to strengthen to 3 per cent in both 2023-2024 and 2024-2025.¹⁵ Household budgets continue to be constrained by higher mortgage rates and other cost-of-living pressures, which have resulted in slower consumption growth in 2023-2024.¹⁶ Growth in consumption is expected to recover to around pre-pandemic averages in 2025-2026.¹⁷

Global geopolitical tensions remain a key risk to the state's economic outlook.¹⁹ However, with expectations that most central banks are close to the peak in the interest rate cycle, concerns over a hard landing for the international and national economies have eased.²⁰ Global supply chain disruptions have generally settled, but labour supply shortages continue to present a challenge for the industry.²¹

Queensland continues to enjoy **exceptionally strong labour market conditions**. In April 2024, Queensland had recorded the largest employment growth of any state or territory in Australia since March 2020 of **366,900 people**.¹⁸

15. The State of Queensland (Queensland Treasury). (2024). *Queensland Budget 2024-25, Economic and Fiscal Overview*. Brisbane: Queensland Government. <https://budget.qld.gov.au/overview/economic-and-fiscal-overview/#:~:text=Following%20growth%20of%202.3%20per,growth%20in%20public%20infrastructure%20investment>

16. Ibid.

17. Ibid.

18. Ibid.

19. Ibid.

20. Ibid.

21. Ibid.

Queensland hospitality industry

This section describes the businesses that make up the hospitality industry in Queensland, their employment profile and the modes of work.

Business profile

The hospitality industry in Queensland is characterised by a mix of national and international hotel chains, regional hotel groups and independent operators. The state has a thriving food and beverage scene with a diverse range of restaurants, cafes, clubs, taverns and bars.

In June 2023,
the hospitality industry was composed of ²²



8909 cafes and restaurants
which made up
82.2%
of all hospitality businesses
(10,836 in total)



Pubs, taverns and
bars made up
10.1%
of hospitality businesses



Clubs made up
6.6% of hospitality
businesses



Liquor retailing
1% of hospitality
businesses

22. Australian Bureau of Statistics. (2023, August 22). *Counts of Australian Businesses, including Entries and Exits July 2019–June 2023*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits/latest-release>

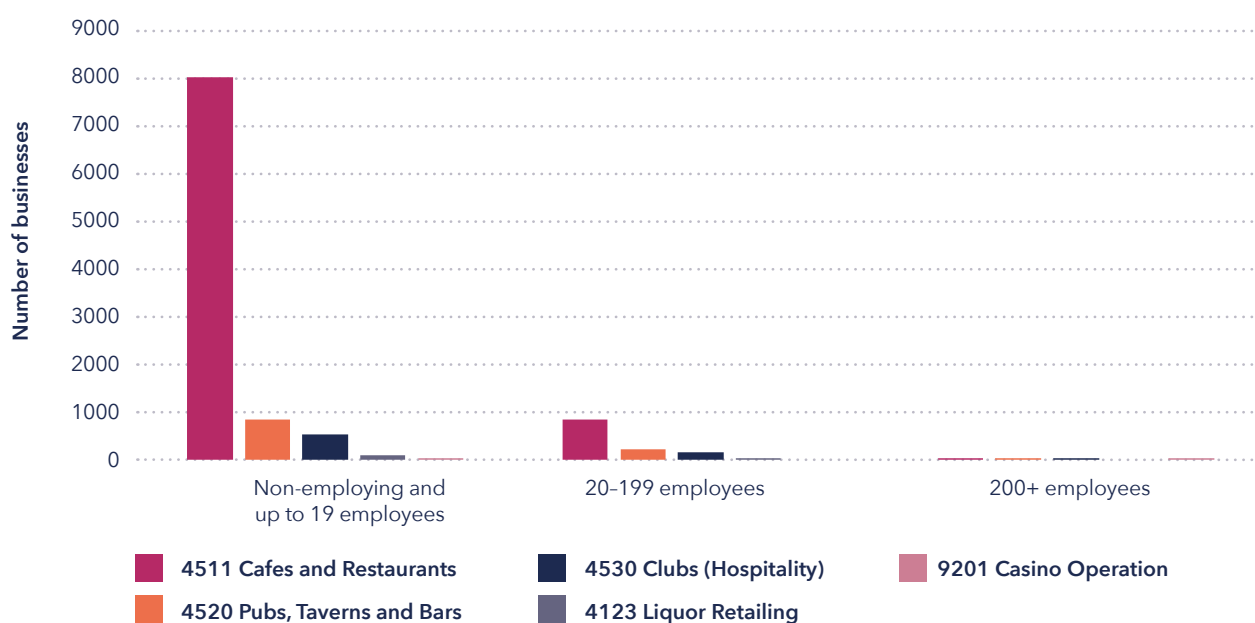


The vast majority of hospitality businesses were small businesses employing less than 20 people (87.6 per cent or 9497).

Only 12 per cent of businesses were classed as medium size (employing between 20 and 199 employees) and 0.4 per cent were classed as large size (employing 200 or more employees). These large businesses were casinos, located in Cairns, Townsville, the Gold Coast and Brisbane.

The number of businesses by business size and ANZSIC class is shown in Figure 3.

Figure 3 | Business numbers by size and ANZSIC class, Queensland, June 2023

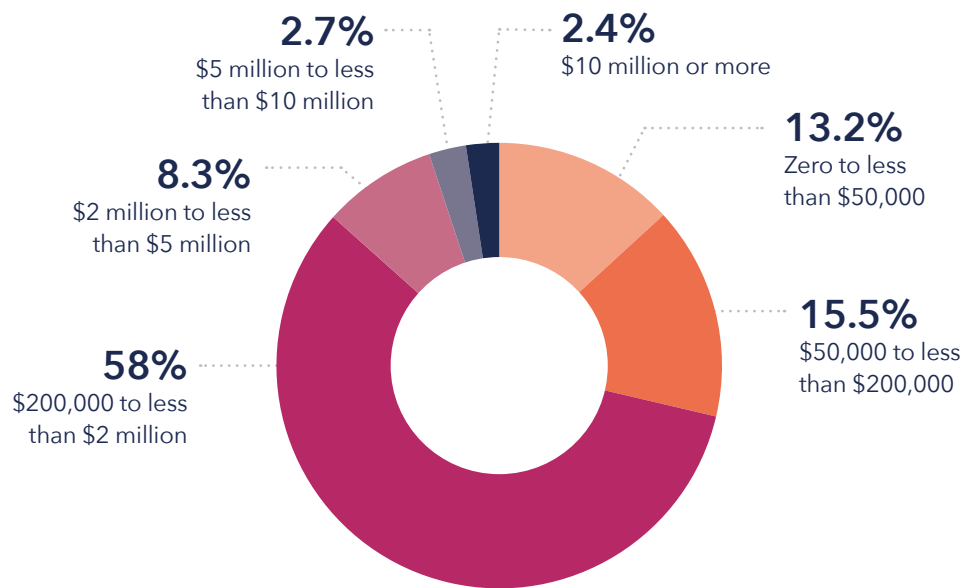


Source: Australian Bureau of Statistics. (2023, August 22). *Counts of Australian Businesses, including Entries and Exits July 2019-June 2023*. Canberra: Australian Government.

Business turnover

Almost 60 per cent of Queensland hospitality businesses had an annual turnover of between \$200,000 and \$2 million as at June 2023, and of these, 87.6 per cent were cafes and restaurants, as shown in Figure 4.²³

Figure 4 | Hospitality-related business turnover, Queensland, June 2023



Source: Australian Bureau of Statistics. (2023, August 22). *Counts of Australian Businesses, including Entries and Exits July 2019–June 2023*. Canberra: Australian Government.

Note: rounding can result in slightly lower or higher figures

Table 2 | Business turnover by ANZSIC class, Queensland, June 2023

| ANZSIC class | Zero to less than \$50,000 | \$50,000 to less than \$200k | \$200,000 to less than \$2 million | \$2 million to less than \$5 million | \$5 million to less than \$10 million | \$10 million or more |
|-------------------------------------|----------------------------|------------------------------|------------------------------------|--------------------------------------|---------------------------------------|----------------------|
| 4511 Cafes and Restaurants | 1165 | 1405 | 5502 | 646 | 134 | 57 |
| 4520 Pubs, Taverns and Bars | 174 | 127 | 436 | 154 | 97 | 107 |
| 4530 Clubs (Hospitality) | 62 | 127 | 310 | 88 | 51 | 79 |
| 4123 Liquor Retailing | 27 | 21 | 33 | 13 | 6 | 9 |
| 9201 Casino Operation ²⁴ | | | | | | 3 |
| Total | 1428 | 1680 | 6281 | 901 | 288 | 255 |

Source: Australian Bureau of Statistics. (2023, August 22). *Counts of Australian Businesses, including Entries and Exits July 2019–June 2023*. Canberra: Australian Government.

23. Australian Bureau of Statistics. (2023, August 22). *Counts of Australian Businesses, including Entries and Exits July 2019–June 2023*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits/latest-release>

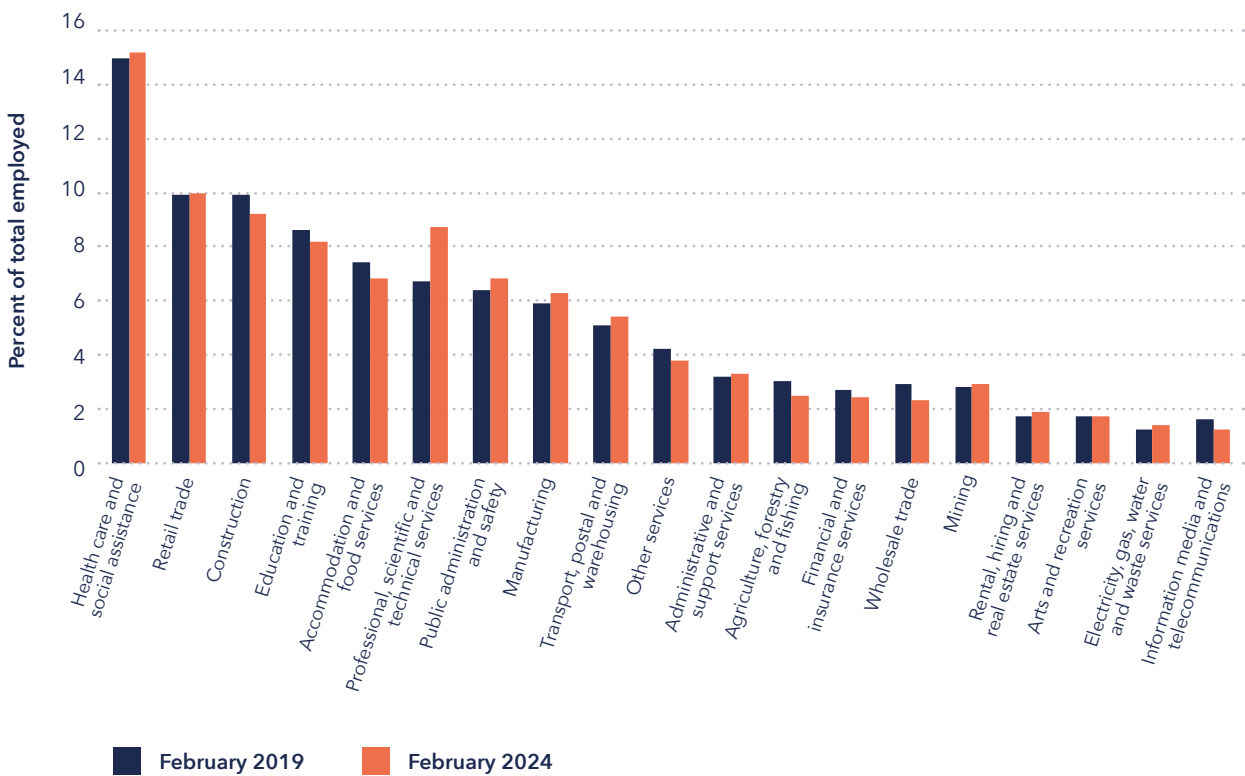
24. The turnover for three casino operations was unspecified.

Employment profile

As at February 2024, the accommodation and food services industry employed 199,100 people in Queensland, making it the sixth largest employing industry. This data relates to workers whose main job is in hospitality and it is likely that many more people work in the sector with second jobs to supplement their primary income.

While the industry employed 7.4 per cent of the state’s workforce in 2019, this has fallen to 6.8 per cent, as shown in Figure 5.²⁵

Figure 5 | Proportion of total employment by industry, Queensland, February 2019 and February 2024

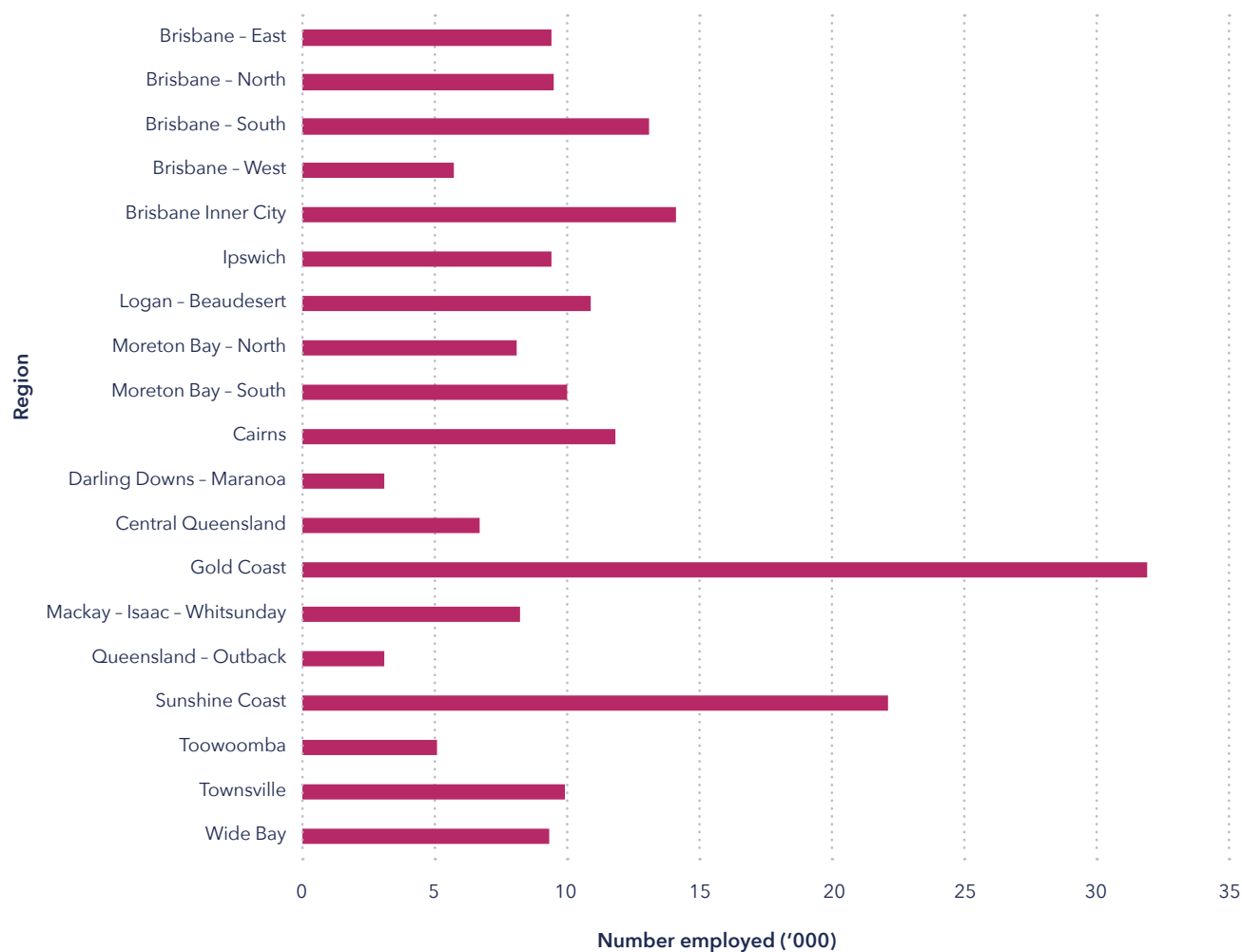


Source: Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed, Table 05. Employed persons by State, Territory and Industry division of main job (ANZSIC)*. Canberra: Australian Government.

25. Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed, Table 05. Employed persons by State, Territory and Industry division of main job (ANZSIC)*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release>

More than half of those Queenslanders employed, whose main job is in the industry, work in the Gold Coast (31,900) and Sunshine Coast (22,100), as shown in Figure 6.²⁶

Figure 6 | Employed total ('000), Accommodation and Food Services (ANZSIC), by SA4, Queensland, May 2024



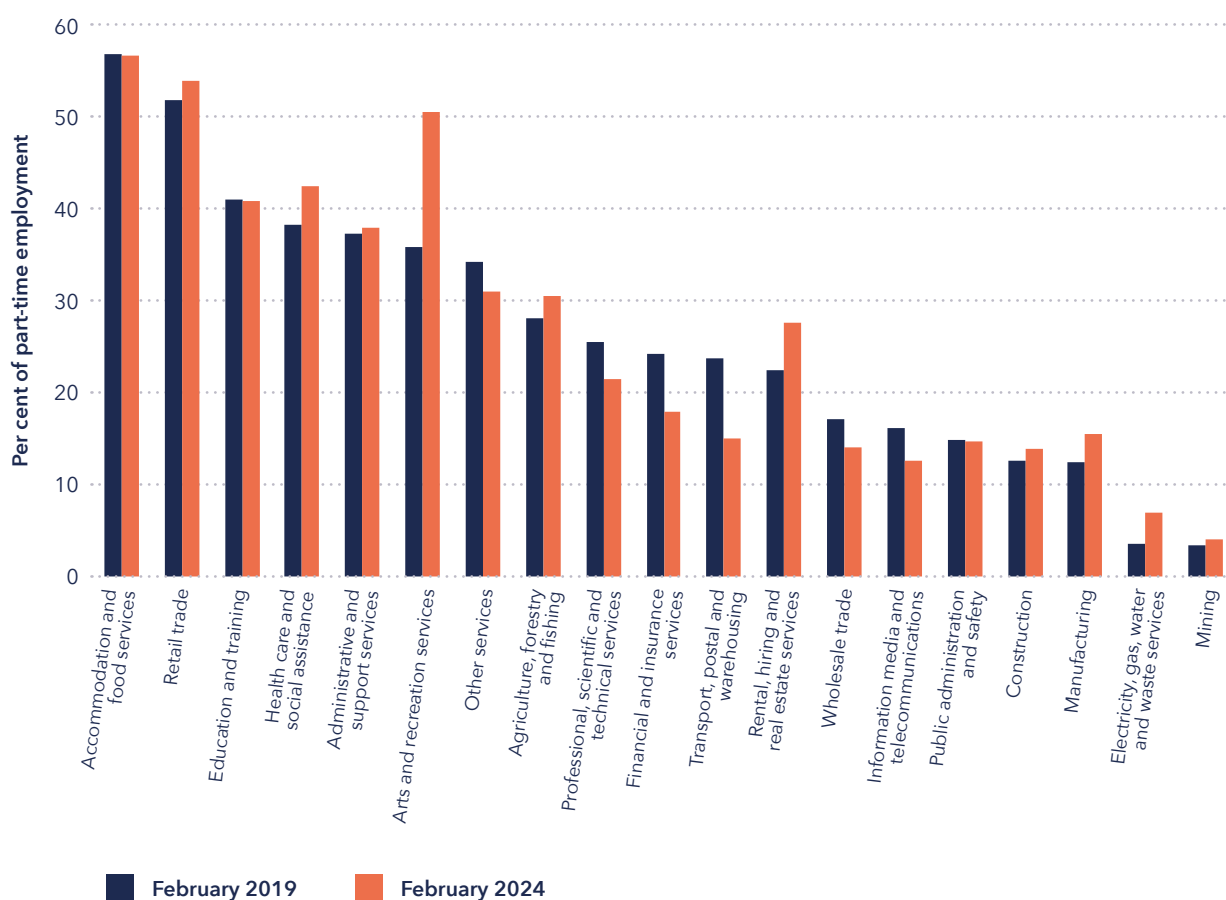
Source: Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed. RQ1 – Employed persons by industry division of main job (ANZSIC), Labour market region (ASGS) and Sex, Annual averages of the preceding four quarters, Year to August 1999 onwards, (Pivot Table)*. Canberra: Australian Government.

26. Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed. RQ1– Employed persons by industry division of main job (ANZSIC), Labour market region (ASGS) and Sex, Annual averages of the preceding four quarters, Year to August 1999 onwards, (Pivot Table)*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release>

Modes of work

The accommodation and food services industry had the highest proportion of part-time workers (53.9 per cent) of all the industries in Queensland.²⁷ This high level of part-time employment has been a constant characteristic of the industry over the past five years, as shown in Figure 7.

Figure 7 | Proportion of part-time employment by industry, Queensland, February 2019 and February 2024



Source: Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed, Table 05. Employed persons by State, Territory and Industry division of main job (ANZSIC)*. Canberra: Australian Government.

27. Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed, Table 05. Employed persons by State, Territory and Industry division of main job (ANZSIC)*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release>

Most regions had a greater proportion of people employed part-time in the industry. Mackay-Issac-Whitsunday, Townsville and Cairns were the exception and the Darling Downs-Maranoa and Outback Queensland regions also had higher levels of full-time employment, as shown in Figure 8.²⁸

All five of these regions are outside of South East Queensland which may indicate employee demand for full-time work may be higher in the regions and that employers are able to offer the work full-time.

Figure 8 | Proportion employed, Accommodation and Food Services (ANZSIC), full-time and part-time, by SA4, Queensland, May 2024



Source: Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed. RQ1 - Employed persons by industry division of main job (ANZSIC), Labour market region (ASGS) and Sex, Annual averages of the preceding four quarters, Year to August 1999 onwards, (Pivot Table)*. Canberra: Australian Government.

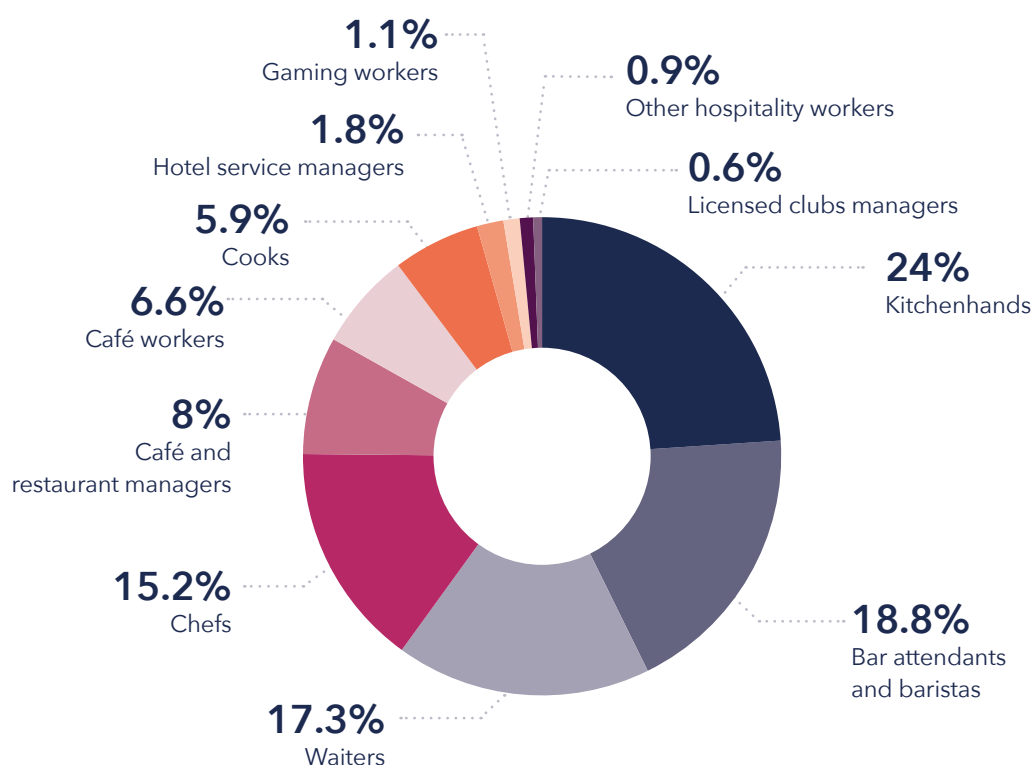
28. Australian Bureau of Statistics. (n.d.). *Labour Force, Australia, Detailed. RQ1 - Employed persons by industry division of main job (ANZSIC), Labour market region (ASGS) and Sex, Annual averages of the preceding four quarters, Year to August 1999 onwards, (Pivot Table)*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/labour/employment-and-unemployment/labour-force-australia-detailed/latest-release>

Queensland hospitality workforce

Within the hospitality industry, there are a number of key occupations ranging from managers; trades such as chefs and cooks; personal service workers such as waiters, bar staff, casino workers, café and restaurant staff; and labourers such as kitchenhands. Detailed occupational information is provided in Appendix 2.

Figure 9 shows the proportion of workers employed in hospitality industry occupations in Queensland in 2024. The largest occupations were kitchenhands (33,503), bar attendants and baristas (26,246), and waiters (24,130) which are all relatively unskilled roles. The largest skilled occupations are chefs (21,314), followed by café and restaurant managers (11,151).²⁹

Figure 9 | Proportion of hospitality workers by occupation, Queensland, February 2024



Source: Jobs and Skills Australia. (n.d.) *Labour Market Insights, Occupations*. Canberra: Australian Government.

Note: rounding can result in slightly lower or higher figures

Nationally, across these larger occupation groupings, annual employment growth to the year ending February 2024 has been mixed with the workforce growing substantially for bar attendants and baristas, chefs, café workers and kitchenhands while the number of waiters, café and restaurant managers and cooks has declined.³⁰

29. Jobs and Skills Australia. (n.d.) *Labour Market Insights, Occupations*. Canberra: Australian Government.
<https://www.jobsandskills.gov.au/data/labour-market-insights/occupations>

30. Ibid.

Migrant labour

The hospitality industry is heavily reliant on migrant workers to meet labour needs. Research conducted by the Grattan Institute in 2022 found that the accommodation and food services industry had the largest share of migrants in its workforce.

This research also found that temporary migrant workers are most likely to be international students (8 per cent of the workforce), New Zealanders (3 per cent), temporary skilled workers (2 per cent), working holiday makers (2 per cent), permanent migrants working in hospitality from the family program (5 per cent), the employer-nominated skilled program (4 per cent), and the skilled independent (points) program (3 per cent).³¹

Migrants in the hospitality industry work in similar occupations to incumbents (those born in Australia or who arrived prior to 2000). Waiters, kitchenhands, bar attendants and café and restaurant managers make up some of the top occupations for both migrants and incumbents.

However, temporary and permanent migrants make up almost half of all chefs and cooks in Australia. Cooks and chefs have been sponsored extensively by employers over the past decade for both permanent and temporary skilled visas.

In 2022-2023, Queensland received 18,039 of the 142,344 places delivered in the skill stream of the permanent migration program, which was an almost 33 per cent increase on pre-COVID-19 places (13,588 places in 2018-2019) which shows the reliance on skilled migrants.³²

Chefs coming to Queensland, at 2841 places, was the fourth largest occupation in terms of numbers of skilled permanent migrants.³³ The majority of the chefs, 1103 places, came via the employer-sponsored category of visas, with the regional category the next highest at 983 places.³⁴ In the same year, cooks were granted 852 places in the skill stream including 529 places in the regional categories.³⁵



40 per cent of workers in the accommodation and food services industry were born overseas



17 per cent of workers hold temporary visas



14 per cent of workers have permanent visas

31. Mackey, W., Coates, B., and Sherrell, H. (2022). *Migrants in the Australian workforce: A guidebook for policy makers*. Carlton: Grattan Institute. <https://grattan.edu.au/wp-content/uploads/2022/05/Migrants-in-the-Australian-workforce.pdf>

32. Department of Home Affairs. (n.d.) *2022-23 Migration Program Report*. Canberra: Australian Government. <https://www.homeaffairs.gov.au/research-and-stats/files/report-migration-program-2022-23.pdf>

33. Ibid.

34. Ibid.

35. Ibid.



Average age



In 2023, most workers in hospitality were younger than the median age of all Australian workers of 39 years. On average, waiters, bar attendants and baristas, kitchenhands and café workers were in their early twenties, indicating that this is a popular job for young people who are likely to have lower skill levels and potentially starting their careers. Managers, chefs and cooks were, on average, older but were still younger than the median age of workers across all occupations in Australia.³⁶

Employment by gender



In 2023, 48 per cent of all Australian workers were female. Again, employment across the hospitality occupations in Australia showed a different pattern, with female workers dominating all occupations except for chefs (38 per cent females) and gaming workers (26 per cent females). The hospitality occupations in Australia with the highest female employment rates were café workers (78 per cent female) and waiters (75 per cent female), which were the occupations with the highest rates of part-time employment and the youngest workforce.³⁷



Earnings

In Australia, the median full-time earnings across hospitality occupations in 2023 was less than the national median full-time earnings of \$1697, as shown in Figure 10. The highest wages were paid to gaming workers (\$1468 per week) and chefs (\$1330 per week). Data was not available for licensed club managers, and it is likely that their wages would be higher than the national average.³⁸

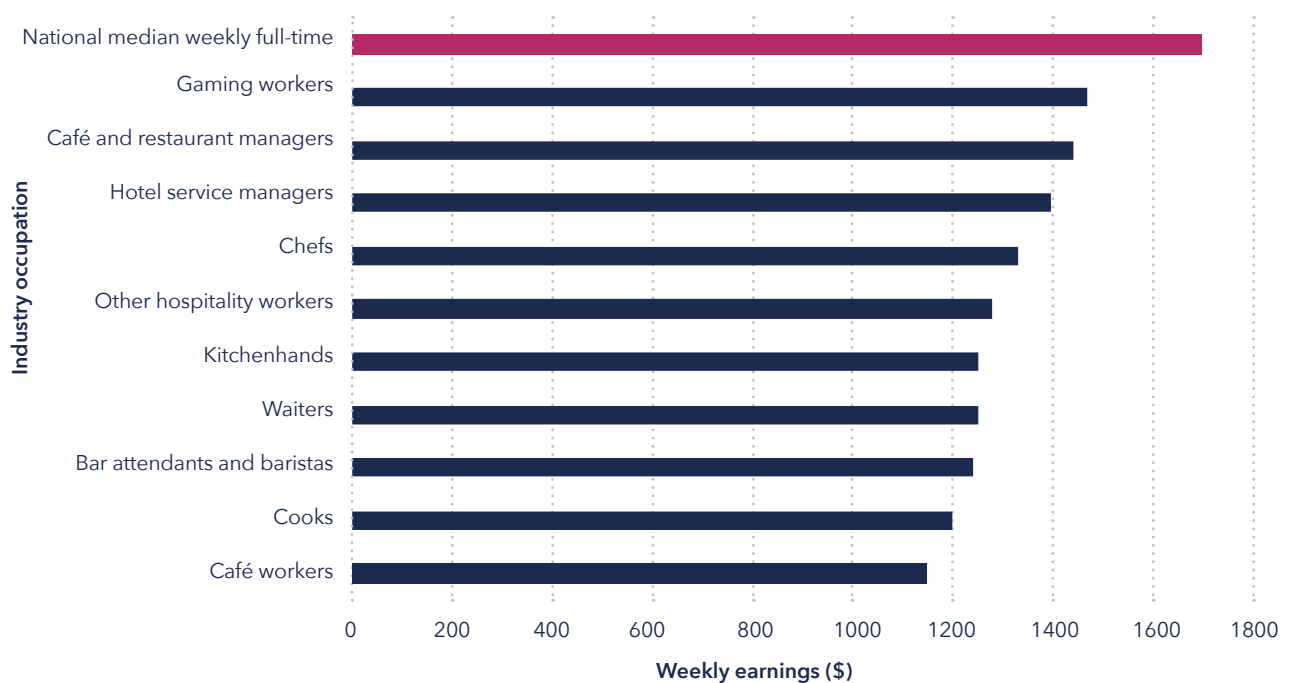
36. Jobs and Skills Australia. (n.d.) *Labour Market Insights, Occupations*. Canberra: Australian Government.
<https://www.jobsandskills.gov.au/data/labour-market-insights/occupations>

37. Ibid.

38. Ibid.



Figure 10 | Median weekly full-time earnings by hospitality occupation compared to the national median, Australia, May 2023



Source: Jobs and Skills Australia. (n.d.) *Labour Market Insights, Occupations*. Canberra: Australian Government.



Employment outlook³⁹

Industry outlook: Employment in the hospitality industry is expected to grow by 8 per cent (16,104 new jobs) by 2025-2026. A substantial portion (10.3 per cent) of these employees will be working within the cafes, restaurants and takeaway food services industry. Clubs (hospitality) is expected to decrease their employment numbers by 9.3 per cent.

It is expected that accommodation and food services will have the biggest increase in number of employed of 8.6 per cent, while arts and recreation services and retail trade will increase by 4.4 per cent and 4.2 per cent respectively.

Occupation outlook: Sales assistants (general) is the largest occupation in the industry and is expected to increase by 8.4 per cent (28,029 employed), this is followed closely by waiters at 5.8 per cent (27,545 employed) and kitchenhands at 11.4 per cent (26,384 employed).

While the following occupations within the hospitality industry are not the largest employers, they are predicted to have significant increases over the next two years.

| Occupation | Employment | Change per cent |
|--|------------|-----------------|
| Bar attendants and baristas | 22,456 | 11.6% |
| Chefs | 18,691 | 17.5% |
| Fast food cooks | 13,680 | 9.5% |
| Café workers | 7402 | 14% |
| Delivery drivers | 3527 | 14% |
| Hotel service managers | 1084 | 34.8% |
| Advertising, public relations and sales managers | 1054 | 17.3% |

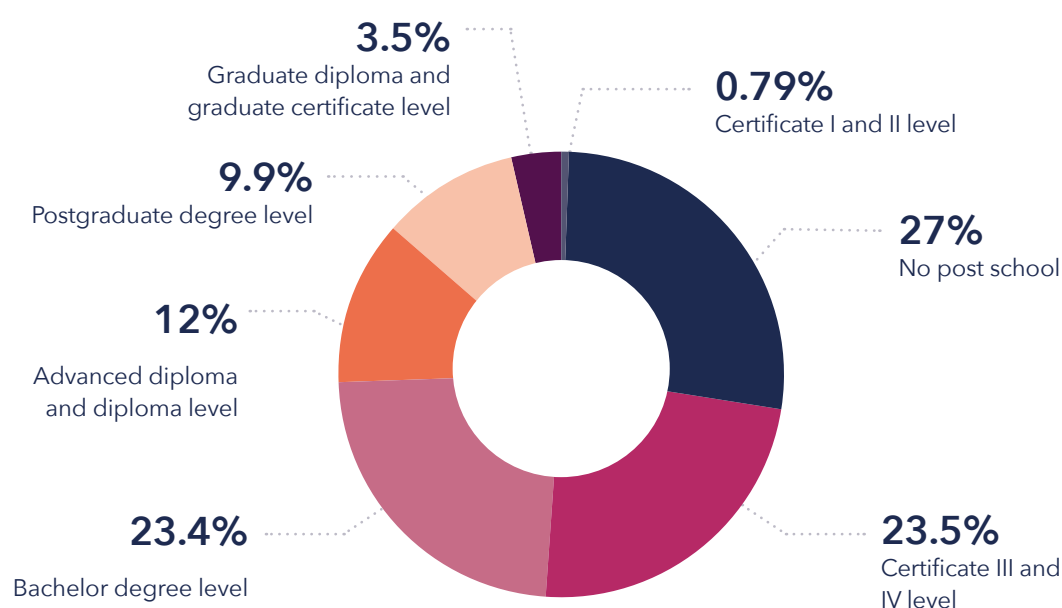
39. Jobs Queensland (2024). *Anticipating Future Skills Series, Data portal*. Ipswich: Jobs Queensland.
<https://jobsqueensland.qld.gov.au/anticipating-future-skills/>

Training pathways

Hospitality is one of the most varied industries offering multiple career paths. It is a broad study area with many course options which include higher education degree courses focussing on management fields of study, as shown in Figure 11. Vocational training courses focus on trade skills

development for roles such as chefs and cooks, including through the use of apprenticeships and traineeships which provide the opportunity to work directly in the field and earn money while learning from industry professionals, along with lower-level qualifications which provide work skills.

Figure 11 | Selected occupation by qualification level, Queensland hospitality industry, 2025-2026



Source: Jobs Queensland. (2024). *Anticipating Future Skills Series, Data portal*. Ipswich: Jobs Queensland.



Higher education

Queensland universities offer a range of hospitality-related higher education qualifications including Bachelor of International Tourism and Hotel Management (Griffith University), Bachelor and Master of Tourism, Hotel and Event Management (University of Queensland) and Bachelor of Hospitality Management (CQUniversity).

According to the latest available Commonwealth Department of Education data, no Queensland students commenced in Food, Hospitality and Personal Services courses between 2018 and 2022. Nationally, commencements have fallen from 2012 in 2018 to 203 in 2022.⁴⁰

40. Department of Education. (2024). *Higher Education Statistics, Student Data*. Canberra: Australian Government. <https://www.education.gov.au/higher-education-statistics/student-data>



Vocational education and training

This section is an analysis of hospitality-related VET program enrolments for Queensland from 2019 to 2022, which includes the Certificate I to IV in Hospitality, Certificate III in Events, Certificate II in Kitchen Operations, Certificate III and IV in Commercial Cookery and Certificate IV in Kitchen Management.

Some occupations require workers to hold specific VET credentials. These requirements are usually put in place by the Australian Government, or state and territory government authorities. While a VET credential itself may be sufficient for industry recognition, it could also be a mandatory prerequisite for gaining an operator's or practitioner's licence. In the main, hospitality occupations are not licensed, although some roles require workers to hold certificates, for example, Responsible Service of Alcohol certificates. The lack of formal licensing for many hospitality roles means that participation in VET courses is not mandatory and is often done for the purposes of skill development.

National Centre for Vocational Education Research (NCVER) data from 2019 to 2022 indicates steady enrolments in hospitality-related programs, with a temporary increase in 2021 (see Table 3). When compared to population growth, however, there was a relative decrease in enrolments. The programs with the highest enrolments annually were the Certificate II and Certificate III in Hospitality.

Females were more likely to be enrolled in hospitality (front of house) and events-related programs while more males enrolled in commercial cookery programs (see Appendix 3, Table A, for details).

Table 3 | Hospitality-related program enrolments, Queensland, 2019 to 2022

| Program name | 2019 | 2020 | 2021 | 2022 |
|--|---------------|---------------|---------------|---------------|
| All programs | 34,280 | 34,265 | 36,500 | 34,205 |
| Certificate I in Hospitality | 2325 | 2035 | 2220 | 1440 |
| Certificate II in Hospitality | 8975 | 9030 | 9610 | 8705 |
| Certificate II in Kitchen Operations | 1705 | 2050 | 2355 | 1970 |
| Certificate III in Events | 305 | 565 | 335 | 165 |
| Certificate III in Hospitality | 12,915 | 10,875 | 10,745 | 10,685 |
| Certificate III in Hospitality (Restaurant Front of House) | 5 | 5 | 10 | 50 |
| Certificate III in Commercial Cookery | 3465 | 3670 | 4100 | 3830 |
| Certificate IV in Hospitality | 1405 | 1800 | 2315 | 2315 |
| Certificate IV in Commercial Cookery | 3180 | 4080 | 4805 | 4695 |

Source: National Centre for Vocational Education Research, 2024. *VOCSTATS database*. Adelaide: National Centre for Vocational Education.

The majority of annual enrolments were domestic students, with the exception of the Certificate IV in Commercial Cookery. For this program international students composed more than 75 per cent of annual enrolments (see Table 4). International student enrolments were also high for the Certificate III in Commercial Cookery. Both programs lead to occupations that are eligible for skilled visas in Australia.

The Certificate III in Hospitality had the next highest number of international student enrolments.

Table 4 | Hospitality-related program enrolments, student international status, Queensland, 2019 to 2022⁴¹

| Program name | International status | 2019 | 2020 | 2021 | 2022 |
|---------------------------------------|------------------------|--------|--------|--------|--------|
| Certificate IV in Commercial Cookery | International students | 2665 | 3180 | 3765 | 3555 |
| | Domestic students | 515 | 900 | 1040 | 1145 |
| Certificate III in Commercial Cookery | International students | 1015 | 1635 | 1750 | 1515 |
| | Domestic students | 2450 | 2035 | 2350 | 2340 |
| Certificate III in Hospitality | International students | 985 | 830 | 435 | 365 |
| | Domestic students | 11,930 | 10,045 | 10,310 | 10,350 |

Source: National Centre for Vocational Education Research, 2024. VOCSTATS database. Adelaide: National Centre for Vocational Education.



Age

Hospitality-related programs have consistently attracted young people to training in the three years since 2019 to 2022 (see Table 5). The majority of those enrolments from 2019 to 2022 were young people aged 15–19. More than 80 per cent of enrolments each year were for those aged 29 and under.

Table 5 | Hospitality-related program enrolments, age, Queensland, 2019 to 2022

| Age group | 2019 | 2020 | 2021 | 2022 |
|--------------------|--------|--------|--------|--------|
| 14 years and under | 75 | 85 | 120 | 125 |
| 15 to 19 years | 20,085 | 19,560 | 20,260 | 18,990 |
| 20 to 24 years | 5370 | 5400 | 5510 | 5190 |
| 25 to 29 years | 3295 | 3530 | 3915 | 3775 |
| 30 to 39 years | 3175 | 3280 | 3995 | 3760 |
| 40 to 49 years | 1335 | 1355 | 1565 | 1385 |
| 50 to 59 years | 755 | 840 | 885 | 730 |
| 60 to 64 years | 145 | 165 | 185 | 160 |
| 65 years and over | 35 | 45 | 55 | 75 |

Source: National Centre for Vocational Education Research, 2024. VOCSTATS database. Adelaide: National Centre for Vocational Education.

41. Programs with the most international student enrolments have been included in this table.

Table 6 shows the programs that had the most enrolments for age groups between 15 and 29 years. Young people aged 15 to 19 years were more likely to enroll in a hospitality certificate than in a commercial cookery program. From the age of 20, commercial cookery enrolments increased. While there is no research available on the motivation for young people to enroll in these programs, the time commitment required for higher level qualifications such as the Certificate III or IV in Commercial Cookery is likely to be a factor. A full breakdown of program enrolments by age is provided at Appendix 3, Table B.

Table 6 | Hospitality-related program enrolments, age, Queensland, 2019 to 2022

| Age group | 2019 | 2020 | 2021 | 2022 |
|---------------------------------------|------|------|------|------|
| 15 to 19 years | | | | |
| Certificate I in Hospitality | 2050 | 1770 | 1890 | 1105 |
| Certificate II in Hospitality | 7845 | 8335 | 8690 | 8105 |
| Certificate II in Kitchen Operations | 1365 | 1755 | 1865 | 1615 |
| Certificate III in Hospitality | 7400 | 6110 | 6540 | 6835 |
| Certificate III in Commercial Cookery | 840 | 755 | 745 | 765 |
| 20 to 24 years | | | | |
| Certificate II in Hospitality | 345 | 230 | 180 | 145 |
| Certificate III in Hospitality | 2355 | 1990 | 1830 | 1700 |
| Certificate III in Commercial Cookery | 1125 | 1170 | 1215 | 1075 |
| Certificate IV in Hospitality | 380 | 475 | 650 | 670 |
| Certificate IV in Commercial Cookery | 965 | 1360 | 1455 | 1325 |
| 25 to 29 years | | | | |
| Certificate II in Hospitality | 190 | 120 | 160 | 100 |
| Certificate III in Hospitality | 1045 | 845 | 645 | 620 |
| Certificate III in Commercial Cookery | 720 | 870 | 980 | 925 |
| Certificate IV in Hospitality | 215 | 285 | 405 | 370 |
| Certificate IV in Commercial Cookery | 990 | 1310 | 1590 | 1600 |

Source: National Centre for Vocational Education Research, 2024. VOCSTATS database. Adelaide: National Centre for Vocational Education.



School

The Gateway to Industry Schools program (GISP) is a key initiative of the Queensland Government that builds partnerships between schools and industry and provides opportunities for industry and the education sector to work together to deliver outcomes for students, local communities and businesses.⁴² Students learn about career opportunities through a blend of school, vocational and academic studies targeted to industry needs. Students and teachers also receive direct support in the form of access to industry connections, training, professional development, work experience and educational opportunities.

The Tourism and Hospitality GISP project has focused on developing skills related to commercial cookery, wine and beverages, hospitality and tourism and successfully increased participation numbers over the past four years (see Table 7).

The Queensland Tourism Industry Council, through its Regional Tourism Careers Roadshow, is showcasing the exciting opportunities in the tourism and hospitality industry to secondary students. The all-day Roadshow events feature activities facilitated by local industry professionals, including mixology and cooking classes, guided tours of local tourism businesses and discussions with industry leaders.

With the introduction of the Queensland Certificate of Education (QCE), schools across the state have broadened their VET offering for students. Hospitality is no exception. There were more than 15,000 enrolments by school students in a hospitality-related program annually between 2019 and 2022 (see Table 8).

Between 2019 and 2022, enrolments at school in the Certificate III in Commercial Cookery averaged 256 per annum. In comparison 15 to 19 year old enrolments in the Certificate III in Commercial Cookery over the same period of time averaged 776 per annum. This suggests there may be more interest than opportunities for students at school to pursue training towards a chosen career as a chef and/or difficulties in combining this course with the requirements of completing a QCE.

Table 7 | Hospitality-related program enrolments, age, Queensland, 2019 to 2022

| Annual Performance Summary | 2019 | 2020 | 2021 | 2022 |
|--|------|------|------|------|
| Total number of schools participating | 62 | 69 | 75 | 95 |
| Total number of students participating | 759 | 1606 | 2060 | 3059 |
| Total number of teachers participating | n/a | n/a | 282 | 458 |
| Total number of industry partners participating | 38 | 53 | 65 | 73 |
| Total number of First Nations students (counted in the total number of students) | n/a | n/a | 102 | 336 |

Source: Department of Employment, Small Business and Training. (2024). *Gateway to Industry Schools program*. Brisbane: Queensland Government.

42. Department of Employment, Small Business and Training. (2024). *Gateway to Industry Schools program*. Brisbane: Queensland Government. <https://desbt.qld.gov.au/training/employers/gateway-schools>



Table 8 | Hospitality-related program enrolments, at school, Queensland, 2019 to 2022

| Program | 2019 | 2020 | 2021 | 2022 |
|---------------------------------------|---------------|---------------|---------------|---------------|
| All programs | 15,085 | 15,750 | 16,615 | 15,120 |
| Certificate I in Hospitality | 1955 | 1650 | 1785 | 995 |
| Certificate II in Hospitality | 7150 | 7840 | 8000 | 7215 |
| Certificate II in Kitchen Operations | 1270 | 1660 | 1780 | 1525 |
| Certificate III in Events | 170 | 425 | 225 | 85 |
| Certificate III in Hospitality | 4260 | 3915 | 4500 | 4940 |
| Certificate III in Commercial Cookery | 250 | 215 | 265 | 295 |
| Certificate IV in Hospitality | 10 | 10 | 20 | 30 |
| Certificate IV in Commercial Cookery | 20 | 35 | 40 | 35 |

Source: National Centre for Vocational Education Research, 2024. *VOCSTATS database*. Adelaide: National Centre for Vocational Education Research.



Apprentices/trainees

The number of hospitality-related enrolments of apprentices and trainees undertaking off-the-job training in Queensland has remained steady from 2019 to 2022 (see Table 9).

This is largely due to the number of enrolments in the Certificate III in Hospitality having increased by 16 per cent. However, over this same period the enrolments for the Certificate III in Commercial Cookery have decreased by 10 per cent, as shown in Figure 12.

Industry's view is that the most important apprenticeship in hospitality is for cooks and chefs, where training is dominated by the Certificate III in Commercial Cookery.⁴³ This downward trend is expected to continue and has contributed to the skills shortages now experienced for these occupations.

Initiatives such as the Commercial Cookery Pilot program, offered by the Queensland Tourism Industry Council and TAFE Queensland, provide an intensive apprentice training model combined with an employer matching program. This approach significantly shortens the apprenticeship completion time for students who aim to become apprentice chefs. Industry feedback on success of the program, whilst well intentioned, is largely mixed.

Table 9 | Hospitality-related program enrolments, apprentices and trainees undertaking off-the-job training, total, Queensland, 2019 to 2022

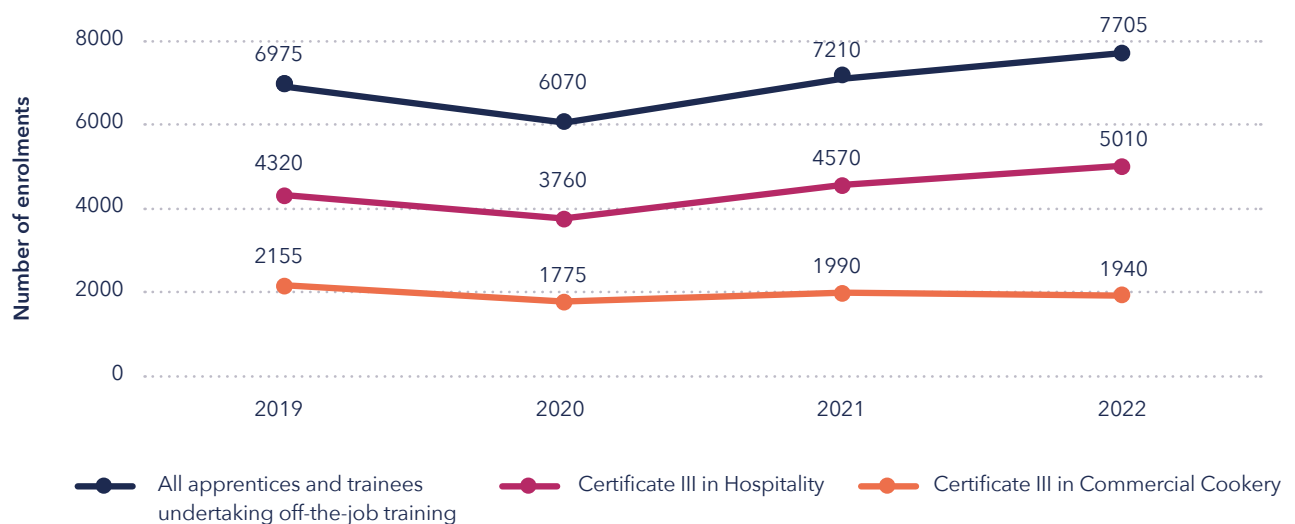
| Program | 2019 | 2020 | 2021 | 2022 |
|---------------------------------------|-------------|-------------|-------------|-------------|
| All programs | 6975 | 6070 | 7210 | 7705 |
| Certificate I in Hospitality | 275 | 260 | 250 | 290 |
| Certificate II in Hospitality | 80 | 50 | 50 | 45 |
| Certificate II in Kitchen Operations | 50 | 35 | 40 | 40 |
| Certificate III in Events | - | - | - | 10 |
| Certificate III in Hospitality | 4320 | 3760 | 4570 | 5010 |
| Certificate III in Commercial Cookery | 2155 | 1775 | 1990 | 1940 |
| Certificate IV in Hospitality | 85 | 185 | 300 | 310 |
| Certificate IV in Commercial Cookery | 10 | 5 | 10 | 60 |

Source: National Centre for Vocational Education Research, 2024. VOCSTATS database. Adelaide: National Centre for Vocational Research.

43. Australian Hotels Association (AHA) and Accommodation Australia (AA). (2024). *Submission to Jobs & Skills Australia on the Draft Core Skills Occupations List (CSOL)*. Sydney: Australian Hotels Association. <https://aha.org.au/wp-content/uploads/2024/06/2024-AHA-AA-Core-Skills-List-JSA.pdf>



Figure 12 | Hospitality-related program enrolments, apprentices and trainees undertaking off-the-job training, Queensland, 2019 to 2022

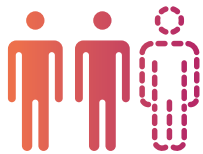


Source: National Centre for Vocational Education Research, 2024. VOCSTATS database. Adelaide: National Centre for Vocational Education.

Findings

Challenges

This section sets out the key challenges facing the industry by drawing on the analysis of the industry in the previous sections.



Critical workforce shortages

In 2024, the hospitality industry faced labour shortages across a range of occupations. According to JSA, the occupations showing the highest number of vacancies in Queensland in 2024 were waiters, chefs, bar attendants and baristas, cooks, and café and restaurant managers.⁴⁴

Staffing shortages were identified by the *JLL Hotel Operator Sentiment Survey Australia* as the most critical challenge facing the hospitality industry, with 80 per cent of respondents highlighting this issue.⁴⁵ Torrens University Australia research also stated ongoing staffing shortages as the primary issue facing the hospitality industry.⁴⁶

According to Jobs Queensland Anticipating Future Skills Series, employment in Queensland is projected to increase by 7.6 per cent, or 206,983 persons, between 2021–2022 and 2025–2026. More than 70 per cent of all new jobs will be in five industries including accommodation and food services. By 2025–2026, accommodation and food services is projected to have 20,088 new jobs.⁴⁷

The hospitality industry will be under pressure to fill these new jobs as Queensland continues to enjoy exceptionally strong labour market conditions and low unemployment. The state's unemployment rate averaged 3.7 per cent in 2022–2023, its lowest year-average unemployment rate since ABS monthly data began in 1978.⁴⁸

As tightness in the labour market continues to unwind gradually, the unemployment rate is expected to edge slightly higher over the medium term but remain low by historical standards.

44. Jobs and Skills Australia. (2024). *Jobs and Skills Atlas*. Canberra: Australian Government. <https://www.jobsandskills.gov.au/data/jobs-and-skills-atlas>

45. JLL IP, 2022, *Hotels and Hospitality, JLL Hotel Operator Sentiment Survey 2022, Australia*. <https://hotelmarketplace.co/wp-content/uploads/jll-hotel-operator-sentiment-survey-hoss-2022.pdf>

46. Bronotte, M. (2023). *The 7 biggest current issues in the Hospitality industry in 2023*. Australia: Torrens University Australia. <https://www.torrens.edu.au/stories/blog/hospitality/current-issues-in-the-hospitality-industry>

47. Jobs Queensland. (2023). *Anticipating Future Skills Series Four*. Ipswich: Queensland Government. <https://jobsqueensland.qld.gov.au/anticipating-future-skills/>

48. The State of Queensland (Queensland Treasury), *2024–25 Queensland Budget, Budget Strategy and Outlook, Budget Paper No.2*, page 4. Queensland Government, Brisbane. https://budget.qld.gov.au/files/Budget_2024-25_BP2_Strategy_Outlook.pdf



Future labour supply

Labour market conditions resulted in strong wages growth in 2023–2024 and Queensland's Wage Price Index is expected to continue to grow solidly, with ongoing real wage growth expected across the medium term.⁴⁹ The hospitality industry will need to maintain wage parity to remain competitive with other industries in a tight labour market.

In addition to facing strong competition from other industries for labour and higher wage expectations from workers, the hospitality industry will be impacted by a smaller pool of workers across skilled and low skilled occupations.



Domestic workers

The overall level of training activity in hospitality VET training courses remained static between 2019 and 2022 and did not keep pace with industry needs. The lack of growth in training activity will result in a diminished pool of skilled hospitality workers.

Of note is the decline in the number of apprentices and trainees undertaking off-the-job training in the key Certificate III in Commercial Cookery. The Australian Hotels Association (AHA) and Accommodation Australia (AA) submission similarly found that cooking apprentices in training in 2023 had dropped below pre-COVID-19 levels.⁵⁰

The age group with the highest rates of participation in VET hospitality courses is 15 to 19 year-olds, the vast majority of who will be school students undertaking VET courses to count towards their QCE. Almost 60 per cent of these enrolments were in lower-level Certificate I and Certificate II courses, which are likely to be easier to combine with school study. These courses provide an important opportunity for young people to gain relevant industry skills and may provide an opportunity to transition them into the industry.

Industry is of the view that if not for VET hospitality qualifications remaining a popular choice for school students across Australia, the falls in training numbers would be even greater, and not many of these students currently progress beyond school to a career in hospitality.⁵¹

In Queensland it is not clear how many school students studying hospitality go on to work in the industry making it difficult to determine whether this activity provides a meaningful contribution to the supply of workers. Further research into the destinations of these students could help inform the industry about the career choices of these young people and potentially tap into an additional pipeline of workers.

While there has been strong growth in enrolments in the Certificate III and Certificate IV in Commercial Cookery, much of this growth has been by international students many of whom would be motivated to study in Australia by the opportunity to undertake post-study work (this is further explored below).

49. The State of Queensland (Queensland Treasury), *2024-25 Queensland Budget, Budget Strategy and Outlook, Budget Paper No.2*, page 4. Queensland Government, Brisbane. https://budget.qld.gov.au/files/Budget_2024-25_BP2_Strategy_Outlook.pdf

50. Australian Hotels Association (AHA) and Accommodation Australia (AA). (2024). *Submission to Jobs & Skills Australia on the Draft Core Skills Occupations List (CSOL)*. Sydney: Australian Hotels Association. <https://aha.org.au/wp-content/uploads/2024/06/2024-AHA-AA-Core-Skills-List-JSA.pdf>

51. Ibid.



Migrant workers

Australia's population grew strongly in recent years, fuelled by unexpected highs in net overseas migration in 2022–2023 and 2023–2024 as the country opened its borders. This growth is expected to moderate in line with a significant tightening of the Australian Government's overseas migration program associated with the implementation of the Migration Strategy.

As a result of recent changes implemented by the Australian Government, tighter eligibility rules will result in decreases in international students and temporary skilled visa holders.

The Australian Government has tightened the eligibility criteria for international students and is introducing caps on international student numbers. As noted earlier, the hospitality industry is heavily reliant on international students, who are allowed under their visa conditions to work up to 48 hours per fortnight, to fill a range of lower skilled roles. A reduction in their numbers will further constrain the pool of available workers.

The Australian Government is also making significant changes to the skilled visa program. From 1 July 2024, skilled visa applicants are required to earn at least \$73,150 annually which is a significant increase from the previous threshold of \$53,900 that applied from 2013 to 2023. The threshold, known as the Temporary Skilled Migrant Income Threshold (TSMIT) was lifted to act as a more accurate indicator of skilled work and ensure it was not depressing the wages of migrant and local workers. The TSMIT will be indexed each year to ensure it maintains its real value and continues to reflect the wages of skilled workers.

The Migration Strategy also includes a new approach to determining the list of occupations eligible for both permanent and temporary skilled visas. Under the current visa arrangements, chefs, cooks and café and restaurant managers are eligible for the broadest range of skills visas, while hotel service managers and licensed club managers are eligible for regional skills visas. These arrangements are, however, currently under review with a new Core Skills Occupations List (CSOL) of eligible occupations being developed by JSA.

It is not certain that key hospitality occupations, such as cooks, chefs, hotel managers, hotel service managers and restaurant managers, will be included in the CSOL and the removal of these skilled visas would have a significant impact on the supply of workers from overseas.

It could also have a significant impact on the appetite of international students to enrol in the Certificate III and IV in Commercial Cookery programs as the ability to move to post-study work visas is likely to be an important consideration for these students.

In advising on the CSOL, JSA has been tasked with considering a broader range of factors to inform the decision as to whether to include occupations on the CSOL, including whether migration is an appropriate path to address the identified shortages, considering how well migrants do in the labour market upon arrival, reliance on sponsored skilled visa holders relative to employment size and vacancy data, the likelihood of domestic supply for those occupations and the market salary for occupations.

52. Australian Hotels Association (AHA) and Accommodation Australia (AA). (2024). *Submission to Jobs & Skills Australia on the Draft Core Skills Occupations List (CSOL)*. Sydney: Australian Hotels Association. <https://aha.org.au/wp-content/uploads/2024/06/2024-AHA-AA-Core-Skills-List-JSA.pdf>

Industry is calling for appropriate transitional arrangements to be implemented by government until such time as more reliable data can properly ascertain the likely employment and migrant economic outcomes from the new system.⁵²

Industry is also concerned that the single list CSOL approach will not allow for sufficient consideration of regional and state/territory variations, including variations in wage rates and cost of living. This may result in local skills shortages not being met, even if the occupation in that region meets the other criteria that would assess the occupation as being suitable for migration sponsorship.⁵³

The interplay between the training and migration systems is complex and the full implications of changes in these settings can be difficult to determine. For skilled occupations, for example chefs, cooks and managers, skill formation is a lengthy process and it will be important that investment to grow the domestic workforce is made ahead of reducing the supply of migrant workers.

Impact of staff shortages on existing staff

A shortage of skilled staff, particularly chefs and cooks, presents a significant challenge, a lack of qualified employees places additional pressure on those currently employed. A joint survey conducted in December 2023 by the Auckland University of Technology and the University of Queensland, *The Mental Health and Wellbeing of Chefs in Commercial Kitchens: An Australasian Study* found:⁵⁴



67% of chefs work more than **38 hours** a week and a fifth of chefs work between **52-61 hours** a week



A quarter of chefs don't receive their **legally required breaks**



15-20% of chefs reported **financial/economic hardship**



2/3 reported **working while sick**

53. Australian Hotels Association (AHA) and Accommodation Australia (AA). (2024). *Submission to Jobs & Skills Australia on the Draft Core Skills Occupations List (CSOL)*. Sydney: Australian Hotels Association. <https://aha.org.au/wp-content/uploads/2024/06/2024-AHA-AA-Core-Skills-List-JSA.pdf>

54. Robinson, R.N.S., Brenner, M., Mooney, S.K., Doan, T., Steffens, N. and Lodge, J. (2023). *The Mental Health and Wellbeing of Chefs in Commercial Kitchens: An Australasian Study*. New Zealand and Brisbane: Auckland University of Technology and University of Queensland. <https://openrepository.aut.ac.nz/server/api/core/bitstreams/95a6635b-a664-4e5d-8b9a-6f9e7b0d8cb3/content>

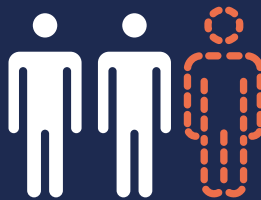
The study found chefs experiencing burnout were more likely to engage in negative work behaviours. Staff shortages can have severe impacts on businesses. According to JSA data as cited by ResDiary, employers noted the following impacts of staff shortages:⁵⁵

65% of employers found that their existing staff are impacted by **working overtime or long hours**



This has associated negative effects in the form of **stress and tiredness**

Not having enough staff members can result in **inferior customer experiences**



28% of employers noted a **negative impact** on productivity, revenue or demand



8% of employers noted that staff shortages **impacted their business reputation**

The impact of staff shortages is compounded by the reduction in formally trained staff. The industry is labour-intensive and is at risk of losing the benefits to productivity of having access to a formally trained workforce. The responsibility of training staff falls on the employer and existing workers to train new staff, and this training is almost always on-the-job non accredited training.

55. ResDiary. (2024). *5 Ways Restaurants Can Adapt to Hospitality Staff Shortages*. Glasgow: ResDiary. <https://resdiary.com/blog/hospitality-staff-shortage-australia-new-zealand>

Barriers to attraction and retention of staff

Solving the problem of staff shortages will require wages to be competitive with other industries. It will also require the industry to improve working conditions that have been made worse by staff shortages.



Industry culture

A 2022 University of Queensland survey of hospitality employees working in Australia, *Serving up a Fair Go? Surfacing cultural issues in hospitality employment*, found an industry culture which was disrespectful and neglectful of the rights of many workers and contrary to the spirit of hospitality.⁵⁶ Seventy per cent of respondents reported physical and mental abuse, with 42 per cent saying the abuse was from managers and supervisors. Sixty per cent had experienced some form of bullying or harassment and 50 per cent of the surveyed hospitality employees did not receive the breaks to which they were entitled.⁵⁷ The survey also found misalignment with the five Fair Work Principles: contracts, pay, working conditions, management and representation.

The authors state they validated the findings by cross-checking decades of research on hospitality conditions. The lead author, Associate Professor Richard N.S. Robinson (a chef prior to entering academia) is part of an international group involved with equivalent surveys conducted in Ireland, Scotland, Norway, Greece and New Zealand with similar results.⁵⁸

The survey noted that retention issues are only made worse when staff are required to work longer hours and become more stressed. This also has a knock-on effect impacting businesses.

Research into the causes of skill shortages commissioned by JSA has found that the most likely driver of these skill shortages for chefs and cooks is a retention gap. Retention gap shortages are where there are below average rates of retention, potentially reinforced by low numbers of new applicants per vacancy. There have been many reports about some of the negative aspects of the occupations of cooks' and chefs' impact on retention rates from underpayment, wage theft and poor working conditions to bullying and harassment and high rates of mental health issues.

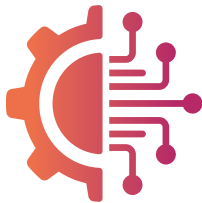
56. Robinson, R.N.S., Oren, O. and Riordan, T. (2022). *Serving up a Fair Go? Surfacing cultural issues in hospitality employment*. Brisbane: University of Queensland. <https://business.uq.edu.au/files/82074/Fair-Go-Surfacing-cultural-issues-hospitality-employment.pdf>

57. Ibid.

58. Dennis, J. (2022, September 14). Survey of hospitality workers shows abuse, other struggles still rampant in industry. *ABC News*. Australia. <https://www.abc.net.au/news/2022-09-14/queensland-hospitality-workers-wage-theft-abuse/101434958>; Robinson, R.N.S., Oren, O. and Riordan, T. (2022). *Serving up a Fair Go? Surfacing cultural issues in hospitality employment*. Brisbane: University of Queensland. <https://business.uq.edu.au/files/82074/Fair-Go-Surfacing-cultural-issues-hospitality-employment.pdf>



Opportunities



Transformative technology

The hospitality industry in Queensland is beginning to embrace transformative technological, driven largely by the rise of delivery apps and the introduction of robotics. Delivery apps such as Uber Eats, Deliveroo and Door Dash have enabled the hospitality industry to reach a broader audience through delivery and takeaway services as consumers adjusted their spending and social habits during lockdowns and restrictions. This shift has not only increased competition but also spurred innovation and menu offerings. Meanwhile, robotics are being introduced to streamline service, reduce labour costs and enhance customer experiences. Robots can take orders, deliver food and engage in basic interactions, addressing challenges such as labour shortages and rising wages. By automating repetitive tasks, staff can focus on the more complex aspects of service, potentially improving overall efficiency and customer satisfaction.

Fully automated restaurants, with minimal human intervention and advanced robotics for meal preparation and service, offer a glimpse into the future of dining. While still in their infancy, these establishments demonstrate how technology can create highly efficient, consistent and scalable dining experiences. The integration of these technologies will have profound implications for the workforce in the hospitality industry. Automation and digital solutions may reduce the demand for certain job roles while creating new opportunities in tech management, maintenance and customer service. The industry must invest in workforce development and training programs to equip employees with the necessary skills to thrive in this technologically advanced environment. Embracing innovation and supporting workforce adaptation will be crucial to ensuring a prosperous and sustainable future for Queensland's hospitality sector.



Workforce strategies

The research shows that attraction and retention of the workforce, particularly skilled labour such as chefs and cooks, is critical. Workforce strategies including targeting relevant segments of the labour market, particularly those that are underrepresented, ensuring fair work conditions including hours of work, providing proper breaks, supporting staff and being cognizant of worker wellbeing, and upskilling existing staff, are all highlighted as relevant opportunities.

The Auckland University of Technology and University of Queensland joint study into the mental health and wellbeing of chefs found team identification, which it also described as belonging to a 'community of chefs', was lower than expected in a survey of 300 chefs. It found 'turnover was lower when perceived supervisory support was high'. This underscores the importance of positive management at the team level. Team identification was also significantly and positively related to organisational citizenship.⁵⁹ The study states that this suggests a correlation between positive supervision, individual wellbeing and organisational behaviours.⁶⁰

Australian Chamber of Tourism executive chair John Hart told ABC news in October 2023 'Trials of a four-day working week, employing more retirees and foreign workers, automated technologies such as robotic waiters have been flagged as potential solutions to worker shortages across Australia.'⁶¹ Mr Hart said that grey nomads, and working holiday makers were part of the workforce solution, but ultimately Australia needed to train more homegrown apprentice chefs and front of house staff.

Similarly, ResDiary offered five ways restaurants can adapt to hospitality staff shortages: sponsor overseas workers, use automation, use efficient rostering, optimise job ads and invest in the current team.⁶²

A local example of using automated technologies and investing in current staff is Priestley's Gourmet Delights recently opened artificially intelligent robot powered factory in Acacia Ridge on Brisbane's southside. The company received a \$2.5 million Made in Queensland grant for equipment to allow sweets previously made in New Zealand to be made in Queensland at its factory run by both humans and robots.⁶³ The Chief Executive Officer said workers were learning to input data relating to the operation of the manufacturing business. However, certain manual jobs such as taste-testing and quality control would still be done by humans. The wholesaler currently supplies Queensland cafes and restaurants and has projected growth with expansion into the retail sector, forecasting an additional 56 staff throughout the business by 2026.⁶⁴

59. Robinson, R.N.S., Brenner, M., Mooney, S.K., Doan, T., Steffens, N. and Lodge, J. (2023). *The Mental Health and Wellbeing of Chefs in Commercial Kitchens: An Australasian Study*. New Zealand and Brisbane: Auckland University of Technology and University of Queensland. <https://openrepository.aut.ac.nz/server/api/core/bitstreams/95a6635b-a664-4e5d-8b9a-6f9e7b0d8cb3/content>

60. Ibid.

61. Lucas, R. (2023, October 31). Worker shortages plagues hospitality industry, 'low wages', insecure casual work cited as factors. *ABC News*. Australia. <https://www.abc.net.au/news/2023-10-31/hospitality-industry-desperate-for-workers/103026688>

62. ResDiary. (2024). *5 Ways Restaurants Can Adapt to Hospitality Staff Shortages*. Glasgow: ResDiary. <https://resdiary.com/blog/hospitality-staff-shortage-australia-new-zealand>

63. Minister for Regional Development and Manufacturing and Minister for Water, The Honourable Glenn Butcher. (2024, May 28). *New Priestley's Gourmet Delights SMART factory opens in Acacia Ridge*. Brisbane: Queensland Government. <https://statements.qld.gov.au/statements/100406>

64. Ibid.



2032 Olympic and Paralympic Games

The 2032 Olympic and Paralympic Games in Brisbane present a unique opportunity to elevate Queensland's hospitality industry. With the influx of athletes, officials, media personnel and spectators, the demand for high-quality accommodation, dining and entertainment services will skyrocket. Skilled workers such as chefs, waitstaff, hotel managers and event coordinators will be essential to ensuring a seamless and memorable experience for all visitors. The increased demand will provide a substantial economic boost, creating new employment opportunities and reducing unemployment rates, while attracting hospitality professionals from across Australia and internationally, enhancing the diversity and expertise of Queensland's workforce.

To meet the demand for skilled hospitality workers, significant investment in training and development programs will be essential. Partnerships between government, industry and educational institutions will help prepare the workforce for the challenges and opportunities presented by the games through apprenticeships, vocational training and upskilling programs. The legacy of the 2032 Olympics will extend beyond the event, with improved facilities and enhanced workforce capabilities positioning Queensland to host future international events and attract major tourism investments. This transformative opportunity will drive economic growth and create lasting employment and development opportunities, ensuring that the benefits of hosting the games extend well into the future.



Enabling infrastructure

The expansion of infrastructure across Queensland will have a significant impact on the hospitality industry. Improvements in public transport, including expanded bus and rail networks, will simplify travel for tourists within the state. Enhanced airports and increased flight connectivity will facilitate easier access to Queensland for both international and domestic visitors. Improved road networks and the construction of new highways will improve accessibility to key tourist destinations. Additionally, investments in digital infrastructure, such as high-speed internet and smart city technologies, will enhance the overall visitor experience and support the growth of the hospitality sector. These advancements will not only attract more visitors but are also likely to encourage longer stays and higher spending, driving sustained growth in the Queensland hospitality industry.

The Queen's Wharf Brisbane development is set to transform South-East Queensland's hospitality industry. This billion-dollar integrated resort is poised to become a landmark destination, featuring luxury hotels, restaurants, bars and entertainment facilities. Scheduled to open in August 2024, Queen's Wharf is projected to attract millions of visitors annually, significantly boosting the local hospitality sector.

This development will create thousands of jobs in the hospitality sector and elevate Brisbane's status as a premier tourist destination. The influx of visitors and the enhanced infrastructure will stimulate further growth and investment in the industry, benefiting local businesses and the broader economy. Additionally, the development of supporting infrastructure, such as improved public transport links and pedestrian pathways, will ensure seamless access to the resort, further bolstering growth. Queen's Wharf Brisbane exemplifies the potential for large-scale projects to drive substantial benefits for the industry.



Government support

Government is working to support the industry both directly and indirectly. The Australian Government is delivering indirect support through the *2023-2024 Energy Bill Relief Fund* to eligible households.⁶⁵

To support its *Thrive 2030 Strategy*, the Australian Government has committed to develop a Visitor Economy Workforce and Skills strategy in response to ongoing workforce pressures exacerbated by the COVID-19 pandemic.⁶⁶ The strategy is to strengthen the visitor economy's workforce, drawing on research to better understand the gaps, barriers and future needs of the visitor economy workforce, and related initiatives being implemented by state and territory governments.

The Queensland Government has expanded on this indirect support through its 2024-2025 Cost of Living package announced as part of the 2024-2025 Queensland Budget.⁶⁷ From 1 July 2024, all Queensland households will receive \$1000 credit on their electricity account. This relief is an expansion of the \$550 Cost of Living Rebate.

The Queensland Government is extending the 50 per cent payroll tax rebate for wages paid to apprentices and trainees for 12 months until 30 June 2025. In addition to apprentice and trainee wages generally being exempt from payroll tax, this rebate provides additional support for businesses supporting youth employment and businesses which employ trainees and apprentices, including those in the hospitality industry.⁶⁸

On top of the financial and non-financial support delivered by the Australian Government, such as the Australian Apprenticeships Incentive Scheme, the Queensland Government has also released the Apprenticeships Info app, a free mobile phone app providing instant answers to apprenticeship questions, with further links to important contacts and services. The app compliments Queensland's Apprenticeships Info helpline, which fields concerns and complaints and offers end-to-end support and advice, tailored to the apprentice's situation and location.⁶⁹

Queensland Government strategies and actions to directly support and benefit the hospitality industry included in *Good People. Good Jobs: Queensland Workforce Strategy 2022-2032*; *Good Jobs, Great Training: Queensland Skills Strategy 2024-2028*; and *Queensland Small Business Strategy 2024-27* are shown in Table 10.



65. Department of Climate Change, Energy, the Environment and Water. (2024). *Energy Bill Relief Fund 2024-25*. Canberra: Australian Government. <https://www.energy.gov.au/energy-bill-relief-fund>

66. Australian Trade and Investment Commission. (2023). *Thrive 2030 revised: The Re-imagined Visitor Economy*. Canberra: Australian Government. <https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy>

67. Queensland Savers. (2024). *Queensland Cost of Living Action*. Brisbane: Queensland Government. <https://www.queenslandsavers.qld.gov.au/>

68. The State of Queensland (Queensland Treasury). (2024). *2024-25 Queensland Budget, Budget Strategy and Outlook, Budget Paper No. 2*. Brisbane: Queensland Government. https://budget.qld.gov.au/files/Budget_2024-25_BP2_Strategy_Outlook.pdf

69. Department of Employment and Workplace Relations. (2024). *Strategic Review of the Australian Apprenticeships Incentive Scheme - Background Paper*. Canberra: Australian Government. <https://www.dewr.gov.au/australian-apprenticeships/resources/strategic-review-australian-apprenticeships-incentive-system-background-paper>

Table 10 | Queensland Government strategies and actions to leverage for the hospitality industry

Good People. Good Jobs: Queensland Workforce Strategy (QWS) 2022-2032⁷⁰

The QWS will deliver innovative and practical solutions to ensure Queensland has a ready workforce to support growth, strengthen communities and keep Queensland at the forefront of new economic opportunities such as Brisbane 2032 Olympic and Paralympic Games.

Actions

- Development of regional action plans to expand and assist school-based apprenticeships and traineeships.
- GISP expanded with the creation of a School to Work Transitions program.
- Industry-based Workforce Advisors who work directly with employers to help them to address workforce challenges and diversify their workforces.
- Regional School Industry Partnership managers in education regions to strengthen school-industry partnerships and support school to work transitions.
- Extension of the Micro-Credentialing Pilot Program to provide increased access to industry-supported short courses (*Micro-credentials support is also an action of the QSS*).

Good Jobs, Great Training: Queensland Skills Strategy (QSS) 2024-2028⁷¹

The QSS sets out a 10-year vision for a strong Queensland workforce focusing on building a workforce to support the state's growth.

Actions

- Deliver more Fee-Free TAFE.
- Open new funding rounds for industry-led skills solutions, such as micro-credentials.

Queensland Small Business Strategy (QSBS) 2024-27⁷²

Over three years, the QSBS will deliver 20 actions across four focus areas to help small business grow and thrive. Actions within the focus areas address common themes and issues raised by small business stakeholders during consultation.

ABS definition of small business: businesses employing fewer than 20 employees – more than 97 per cent of all businesses in Queensland are small businesses. The majority of hospitality employers (87.6 per cent) are small businesses.

Focus areas

1. Lowering costs for small business.
2. Boosting opportunities for small business.
3. Building business resilience, capability and workforce.
4. Growing diversity.

This is also consistent with Jobs Queensland's Enhancing workforce participation and diversity for small to medium-sized enterprises phased research project.⁷³

70. Queensland Government. (2022). *Good People. Good Jobs: Queensland Workforce Strategy 2022-2032*. Brisbane: Queensland Government. https://www.publications.qld.gov.au/ckan-publications-attachments-prod/resources/ff453627-3e2a-4dc5-96c5-a3e7bdf963fa/final-queensland-workforce-strategy_2022-2032.pdf?ETag=01bfdc37789b9d96bf8baeda54b32273
71. Queensland Government. (2024). *Good Jobs, Great Training: Queensland Skills Strategy 2024-2028*. Brisbane: Queensland Government. https://www.publications.qld.gov.au/ckan-publications-attachments-prod/resources/4937e752-7207-4def-82d8-7fdc340b09bf/qvet-summary_master-2024_digital.pdf?ETag=5b529e067a05433d8cd30cb33827f061
72. Department of Employment, Small Business and Training. (2024). *Queensland Small Business Strategy 2024-2027*. Brisbane: Queensland Government. <https://www.publications.qld.gov.au/ckan-publications-attachments-prod/resources/32b59273-9deb-4430-a635-ce9f2f4f61f4/qsbs-strat-doc-2024-digital.pdf?ETag=e452953e3778d71065899154429fa60e>
73. Jobs Queensland. (2023). *Enhancing workforce participation and diversity for small to medium-sized enterprises (SMEs)*. Ipswich: Queensland Government. <https://jobsqueensland.qld.gov.au/all-projects/enhancing-workforce-participation-and-diversity-for-smes>

Considerations for further investigation

This environmental scan has identified three key areas for further investigation:



Undertake further labour supply research – to better understand how to improve the industry's ability to diversify the pool of potential workers.



Challenge the myths about industry – to help potential workers understand the opportunities available across the industry and promote hospitality businesses as an employer of choice.



Explore training options – to help improve the responsiveness of the training sector and products to employers' needs and ensure workers have the skills they need to prosper in the workplace.



1. Undertake labour supply research

Labour supply research would help the hospitality industry better understand how to improve its ability to diversify the pool of potential workers. This work could be done in collaboration with the Jobs and Skills Council for the hospitality industry, Service and Creative Skills – Australia, and could draw on existing information and data that may be held by departments to form a complete picture, filling in the gaps with this new research.

There is a range of demographics (including women, First Nations people, migrant and refugee communities, people with disability, young people and mature workers) that are employed in the hospitality industry with many and varied personal circumstances. It should be noted that research on First Nations peoples and people with disability in the hospitality workforce is limited.

Targeted recruitment efforts, informed by a deeper understanding of the barriers to employment in the industry, can help attract a broader range of potential workers, including those who have been previously underrepresented. This approach aligns with the QWS goals for enhancing workforce participation and building a more diverse workforce.

The labour supply research will help employers understand the drivers for a diverse workforce to come into the industry. For example, some 15,000 school students are enrolled in hospitality industry related courses each year, so it's important to understand more about this group in order to motivate them to use their skills in the industry.

Once the labour supply research has been completed, it would be useful to see what role technology* could play in assisting worker attraction. This could include investigating the development of a hospitality jobs app to help match hospitality workers and their skills with vacancies. This would be additional to established platforms such as SEEK and LinkedIn as it would have a hospitality specific focus. It would be important to investigate how this app or new technology could interface with existing technology including online job boards created by Regional Job Committees.

Once developed, the app or technology enabled connector could be advertised via direct marketing through membership databases of hospitality organisations and amplified through social media campaigns. Social media posts should be targeted and placed on the relevant platforms that are used most by the segmented labour demographic.

**Technology is transforming the hospitality industry with QR codes for menus, robots taking food orders, online bookings, the rise of delivery apps such as Uber Eats, chatbots or virtual assistants to respond to customer questions or feedback, virtual reality, the internet of things (IoT) and Augmented Reality (AI) already in use. Identifying how the technology is working now (pros and cons) and where the next uses of technology are likely to be, will become important to inform and aid the industry in how to continue to be innovative in this space.*



2. Challenge the myths about industry

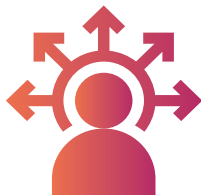
Addressing the industry's image issues is crucial for attracting potential workers. To effectively challenge misconceptions, it is important to use targeted marketing materials and myth-busting strategies. Building on labour supply research, these materials will help clarify the diverse opportunities within the hospitality industry and also promote hospitality businesses as an employer of choice. Social media strategies can enhance job ads and support a sustained, targeted campaign through the state and in regional areas.

Tailoring positive messages for different demographics and groups can highlight the industry's benefits:

- Young people: promote the hospitality industry as a vibrant career choice that offers social interaction and valuable transferable skills.
- Career changers: emphasise the industry's flexibility and reduced responsibility compared to other fields.
- Women with children: highlight the availability of flexible work schedules.
- Women in culinary roles: showcase the creative opportunities within the industry.
- Grey nomads: offer the appeal of earning extra income while engaging with local communities.
- Working holiday visa holders: promote lifestyle benefits and the chance to explore Queensland while working.
- International students: promote flexible rosters that accommodate study schedules.
- People seeking second jobs: highlight the availability of casual and part-time positions with flexible hours.

To address common myths and attract workers, consider these key points:

- Work hours: clarify that the industry offers flexible working hours, not just long or irregular shifts.
- Role diversity: highlight the range of positions available, including back-of-house, finance, managerial and maintenance roles, beyond just front-of house.
- Career advancement: emphasise that hospitality careers offer opportunities for growth and promotion.
- Employer of choice: emphasise that hospitality businesses create a positive workplace culture, value their staff and their wellbeing, have zero tolerance for workplace bullying and harassment including by customers.



3. Explore training options

Help improve the responsiveness of the training sector and products (such as short courses and micro-credentials) to employers' needs, and ensure students have the skills they need to prosper in the workplace.

Micro-credentials could be designed to upskill existing staff helping to address the reported drop in skill levels and what KPMG calls 'low level skills matching'.⁷⁴

They could also support individuals re-entering the workforce due to cost-of-living pressures and support participants in gaining the confidence needed to re-skill and pursue employment in the hospitality industry.

A suite of micro-credentials could be developed to meet industry needs. For example, short eLearning modules designed to encourage completion could be co-developed on:

- customer service
- team-building and management skills
- financial skills – budgeting, running an effective and profitable kitchen.

It is important to focus on growing a domestic labour supply. The industry is calling for more support for training and apprenticeships in hospitality.⁷⁵ Industry consultation in the AHA and AA submission revealed that the most common reasons for students giving up training were lack of parental, school or teacher support. Training was also hampered due to trainers leaving for higher pay in the hospitality industry. Individuals from Generations Z (born 1996–2012) and Alpha (born 2010–2025) considered four years of training too long.⁷⁶

The Australian Government is currently reviewing the Australian Apprenticeship Incentive System to explore ways to better support individuals in starting and completing apprenticeships and traineeships. This review aims to provide valuable insights into the necessary support to boost the completion rates of apprenticeships and traineeships in the hospitality industry.

Despite some industry feedback, there is a notable lack of information on how effectively hospitality training translates into jobs, especially for 15 to 19 year-olds. Addressing this gap with concrete evidence is essential, as these young individuals represent a vital addition to the labour force.

In collaboration with GISP, research can be undertaken to identify successful training models currently being utilised in schools. Sharing these best practices with other schools can help promote and expand school-based apprenticeships, particularly in the Certificate III in Commercial Cookery, encouraging more enrolments and higher completion rates among students.

74. KPMG. (2024). *Australian labour market in detail*. Australia: KPMG. <https://assets.kpmg.com/content/dam/kpmg/au/pdf/2024/australian-labour-market-in-detail-june-2024.pdf>

75. Australian Hotels Association (AHA) and Accommodation Australia (AA). (2024). *Submission to Jobs & Skills Australia on the Draft Core Skills Occupations List (CSOL)*. Sydney: Australian Hotels Association. <https://aha.org.au/wp-content/uploads/2024/06/2024-AHA-AA-Core-Skills-List-JSA.pdf>

76. Ibid.

Conclusion

The hospitality industry offers many positives, including a variety of roles, diverse locations, on-the-job training and opportunities for advancement. However, addressing certain challenges can further enhance workforce attraction and retention. Wage levels and working conditions have been identified as areas for improvement, which could help more individuals complete their studies and pursue careers in this vibrant field.

Over the past five years, the hospitality industry has demonstrated resilience despite facing a series of challenges due to the COVID-19 pandemic, labour and skills shortages, cost of living pressures and inflation. Many businesses have successfully pivoted and leveraged technology to innovate, driving the industry through a dynamic period of transition.

The industry is primarily composed of small businesses and is characterised by a high level of casual employment and staff turnover.⁷⁷ Regional areas face additional staffing challenges due to housing shortages. To further attract potential staff, the industry must address its reputation by improving perceptions of pay, working conditions and workplace culture.⁷⁸ By doing so, hospitality can enhance its appeal to job seekers and compete more effectively with other industries.

Despite competition for a limited pool of workers, there are significant opportunities to attract and retain talent. Implementing targeted strategies to support training enrolments and completions, especially in key skilled positions such as cooks and chefs, will help the industry grow its workforce. By focusing on these strategies, the hospitality industry can continue to thrive and offer rewarding career paths for many.

There are numerous opportunities to attract and retain workers and successfully transition those enrolled in training into the workforce. By implementing a series of targeted strategies, the hospitality industry can continue to grow and flourish, enhancing its appeal and ensuring a steady pipeline of skilled professionals ready to contribute to its success.

77. Australian Bureau of Statistics. (2023, August 22). *Counts of Australian Businesses, including Entries and Exits July 2019–June 2023*. Canberra: Australian Government. <https://www.abs.gov.au/statistics/economy/business-indicators/counts-australian-businesses-including-entries-and-exits/latest-release>

78. Robinson, R.N.S., Oren, O. and Riordan, T. (2022). *Serving up a Fair Go? Surfacing cultural issues in hospitality employment*. Brisbane: University of Queensland. <https://business.uq.edu.au/files/82074/Fair-Go-Surfacing-cultural-issues-hospitality-employment.pdf>

Appendices

Appendix 1 - Effects of the pandemic on hospitality

Table A | Impact of COVID-19 on the hospitality industry, Queensland and Australia⁷⁹

| Hospitality sectors | Workforce snapshot Gen Z (Born 1996–2012), Millennials (Born 1981– 1995), Gen X (Born 1965– 1980), Baby Boomers (Born 1946–1964) | Most affected generation/ relative shift work decline | Key effects by sector (Australia) | Queensland effect |
|------------------------------------|---|--|--|--|
| Pubs and Bars | 48% Millennials 29% Gen Z 17% Gen X 6% Baby Boomers 56% Men 44% Women | Gen Z -4.3% | 2020 shift work declined >90% (worst hit) Vulnerability highlighted as dependent on music and entertainment, on-site patronage and expenditure on drinks. Alcohol regulations and competition from take-away liquor stores dampened their ability to pivot to opportunities in take-away alcohol. | Boom in domestic travel in Queensland due to international travel bans and excess savings from households saw shift work employment exceed pre-pandemic levels. |
| Cafes and Coffee Shops | 47% Millennials 39% Gen Z 11% Gen X 3% Baby Boomers 57% Women 43% Men | Gen Z -4.0% | 2020 shift work declined >40% Resilience highlighted with some thriving. Combination of relocation of remote workers to neighbourhood suburbs and excess domestic savings supported growth. | Operating well above pre-pandemic levels as at October 2021 in Queensland due to less lockdowns. |
| Fast Food and Chain Restaurants | 49% Gen Z 42% Millennials 8% Gen X 1% Baby Boomers 50% Women 50% Men | Baby Boomers -6.7% | 2020 shift work declined >60% Resilience highlighted; sector has arguably thrived compared to the rest of its hospitality peers. | By October 2021 operating well above pre-pandemic employment levels with Queensland on top (118% increase) compared with other States and Territories. |
| Sit Down Restaurants | 55% Millennials 34% Gen Z 10% Gen X 1% Baby Boomers 58% Men 42% Women | Baby Boomers -5.3% | 2020 shift work declined <80% Resilience highlighted due to combination of opportunities from remote workers in neighbourhood suburbs and excess domestic savings. | By October 2021 operating well above pre-pandemic employment levels with Queensland (226% increase) on top compared with other States and Territories. |

Source: Deputy. (2021). *Staying Open: Future-Proofing Aussie Hospitality*. Australia: Deputy Newsroom.

79. Deputy. (2021). *Staying Open: Future-Proofing Aussie Hospitality*. Australia: Deputy Newsroom. <https://news.deputy.com/new-report-reveals-the-pandemics-impact-on-australias-hospitality-industry-what-the-road-to-recovery-entails>

Appendix 2 - Characteristics of hospitality occupations

Table A | Characteristics of hospitality occupations

| Occupation ANZSCO | Number of workers Median wage (Aus) ⁸⁰ | Median wage (Aus) ⁸¹ | Average age (Aus) ⁸² | Part-time share (Aus) ⁸³ | Female share (Aus) ⁸⁴ | Annual employment growth (Aus) ⁸⁵ | Current vacancies ⁸⁶ | Future demand (Qld) ⁸⁷ | Skilled visa eligibility ⁸⁸ |
|-----------------------------------|--|---------------------------------|---------------------------------|-------------------------------------|----------------------------------|--|---------------------------------|---|--|
| Café and restaurant managers 1411 | 11,151 Qld 63,000 Aus | \$1441 \$37 per hour | 41 | 24% | 56% | -900 | 228 Qld 895 Aus | At economy wide average | Eight visas |
| Licensed club managers 1414 | 817 Qld 7100 Aus | N/A N/A | 39 | 6% | 56% | 100 | N/A | At economy wide average. No shortages. | Two visas (regional) |
| Chefs 3513 | 21,314 Qld 121,100 Aus | \$1330 \$34 per hour | 35 | 19% | 28% | 4500 | 650 Qld 2777 Aus | At economy wide average. Shortage. | All visas |
| Cooks 3514 | 8232 Qld 39,200 Aus | \$1198 \$31 per hour | 35 | 53% | 59% | -200 | 323 Qld 1553 Aus | At economy wide average. Shortage. | All visas |
| Bar attendants and baristas 4311 | 26,246 Qld 119,300 Aus | \$1240 \$33 per hour | 23 | 65% | 56% | 5300 | 391 Qld 1833 Aus | Above economy wide average. | No |
| Café workers 4312 | 9209 Qld 36,400 Aus | \$1148 \$30 per hour | 23 | 79% | 78% | 1900 | 82 Qld 445 Aus | Not available. | No |
| Gaming workers 4313 | 1487 Qld 5900 Aus | \$1468 \$39 per hour | 34 | 27% | 26% | 0 | N/A | Above economy wide average. No shortages. | No |
| Hotel service managers 4314 | 2465 Qld 9300 Aus | \$1394 \$33 per hour | 36 | 28% | 64% | 500 | N/A | At economy wide average. No shortages. | Two visas (regional) |
| Waiters 4315 | 24,130 Qld 127,000 Aus | \$1249 \$31 per hour | 20 | 81% | 75% | -3000 | 819 Qld 3986 Aus | Above economy wide average. Regional shortage. | No |
| Other hospitality workers 4319 | 1250 Qld 7100 Aus | \$1277 \$34 per hour | 22 | 63% | 58% | 300 | N/A | Not available. | No |
| Kitchenhands 8513 | 33,503 Qld 148,900 Aus | \$1250 \$31 per hour | 21 | 80% | 53% | 1700 | 279 Qld 1314 Aus | Not available. | No |

80. Jobs and Skills Australia. (2024). Data. Labour Market Insights. *Occupations*. Canberra: Australian Government. <https://www.jobsandskills.gov.au/data/labour-market-insights/occupations>

81. Ibid.

82. Ibid.

83. Ibid.

84. Ibid.

85. Ibid.

86. Jobs and Skills Australia. (2024). *Jobs and Skills Atlas*. Canberra: Australian Government. <https://www.jobsandskills.gov.au/data/jobs-and-skills-atlas>

87. Jobs and Skills Australia. (2023). *Skills Priority List*. Canberra: Australian Government. <https://www.jobsandskills.gov.au/data/skills-shortages-analysis/skills-priority-list?code=211111>

88. Department of Home Affairs. (2023). *Immigration and Citizenship, Skilled Occupation List*. Canberra: Australian Government. <https://immi.homeaffairs.gov.au/visas/working-in-australia/skill-occupation-list#>

Appendix 3 - Queensland VET enrolments, 2019-2022

Table A | Hospitality-related program enrolments, by gender, Queensland, 2019 to 2022⁸⁹

| Program name | Gender ⁹⁰ | 2019 | 2020 | 2021 | 2022 |
|---|----------------------|------|------|------|------|
| Certificate I in Hospitality | Males | 795 | 785 | 830 | 520 |
| | Females | 1530 | 1250 | 1390 | 915 |
| Certificate II in Hospitality | Males | 3185 | 3175 | 3415 | 3055 |
| | Females | 5710 | 5965 | 6140 | 5630 |
| Certificate II in Kitchen Operations | Males | 830 | 885 | 1105 | 915 |
| | Females | 870 | 1160 | 1235 | 1040 |
| Certificate III in Events | Males | 45 | 65 | 35 | 25 |
| | Females | 260 | 495 | 300 | 135 |
| Certificate III in Hospitality | Males | 4730 | 4050 | 4105 | 4210 |
| | Females | 8100 | 6740 | 6595 | 6445 |
| Certificate III in Hospitality (Restaurant Front of House) | Males | 5 | - | 5 | 20 |
| | Females | - | - | 5 | 30 |
| Certificate III in Commercial Cookery | Males | 2205 | 2220 | 2485 | 2275 |
| | Females | 1245 | 1430 | 1595 | 1555 |
| Certificate IV in Hospitality | Males | 465 | 535 | 765 | 835 |
| | Females | 910 | 1255 | 1540 | 1475 |
| Certificate IV in Commercial Cookery | Males | 1800 | 2230 | 2560 | 2515 |
| | Females | 1305 | 1760 | 2125 | 2115 |
| Certificate IV in Kitchen Management | Males | - | - | - | 125 |
| | Females | - | - | - | 90 |

Source: National Centre for Vocational Education Research, 2024. *VOCSTATS database*. Adelaide: National Centre for Vocational Education.

89. National Centre for Vocational Education Research. 2024. *VOCSTATS database*. Adelaide: National Centre for Vocational Education Research. <https://www.ncver.edu.au/research-and-statistics/data>

90. Does not include gender other and gender not known.

Table B | Hospitality-related program enrolments, age, Queensland, 2019 to 2022⁹¹

| Program name | 2019 | 2020 | 2021 | 2022 |
|--|---------------|---------------|---------------|---------------|
| 14 years and under | | | | |
| Program total | 75 | 85 | 120 | 125 |
| Certificate I in Hospitality | 15 | 20 | 30 | 5 |
| Certificate II in Hospitality | 15 | 20 | 10 | 20 |
| Certificate II in Kitchen Operations | 5 | 5 | 10 | 5 |
| Certificate III in Hospitality | 45 | 35 | 70 | 95 |
| Certificate III in Commercial Cookery | - | - | 5 | - |
| 15 to 19 years | | | | |
| Program total | 20,085 | 19,560 | 20,260 | 18,990 |
| Certificate I in Hospitality | 2050 | 1770 | 1890 | 1105 |
| Certificate II in Hospitality | 7845 | 8335 | 8690 | 8105 |
| Certificate II in Kitchen Operations | 1365 | 1755 | 1865 | 1615 |
| Certificate III in Events | 200 | 455 | 250 | 100 |
| Certificate III in Hospitality | 7400 | 6110 | 6540 | 6835 |
| Certificate III in Hospitality (Restaurant Front of House) | - | - | 5 | 10 |
| Certificate III in Commercial Cookery | 840 | 755 | 745 | 765 |
| Certificate IV in Hospitality | 175 | 155 | 180 | 305 |
| Certificate IV in Commercial Cookery | 215 | 225 | 100 | 130 |
| Certificate IV in Kitchen Management | - | - | - | 25 |
| 20 to 24 years | | | | |
| Program total | 5370 | 5400 | 5510 | 5190 |
| Certificate I in Hospitality | 95 | 90 | 80 | 80 |
| Certificate II in Hospitality | 345 | 230 | 180 | 145 |
| Certificate II in Kitchen Operations | 70 | 55 | 75 | 50 |
| Certificate III in Events | 35 | 35 | 20 | 25 |
| Certificate III in Hospitality | 2355 | 1990 | 1830 | 1700 |
| Certificate III in Hospitality (Restaurant Front of House) | - | - | - | 10 |
| Certificate III in Commercial Cookery | 1125 | 1170 | 1215 | 1075 |
| Certificate IV in Hospitality | 380 | 475 | 650 | 670 |
| Certificate IV in Commercial Cookery | 965 | 1360 | 1455 | 1325 |
| Certificate IV in Kitchen Management | - | - | - | 105 |
| 25 to 29 years | | | | |
| Program total | 3295 | 3530 | 3915 | 3775 |
| Certificate I in Hospitality | 50 | 35 | 30 | 45 |
| Certificate II in Hospitality | 190 | 120 | 160 | 100 |
| Certificate II in Kitchen Operations | 55 | 40 | 80 | 45 |

91. National Centre for Vocational Education Research. 2024. *VOCSTATS database*. Adelaide: National Centre for Vocational Education Research. <https://www.ncver.edu.au/research-and-statistics/data>

| Program name | 2019 | 2020 | 2021 | 2022 |
|--|------|------|------|------|
| Certificate III in Events | 30 | 25 | 25 | 10 |
| Certificate III in Hospitality | 1045 | 845 | 645 | 620 |
| Certificate III in Hospitality (Restaurant Front of House) | - | - | 5 | 10 |
| Certificate III in Commercial Cookery | 720 | 870 | 980 | 925 |
| Certificate IV in Hospitality | 215 | 285 | 405 | 370 |
| Certificate IV in Commercial Cookery | 990 | 1310 | 1590 | 1600 |
| Certificate IV in Kitchen Management | - | - | - | 45 |

30 to 39 years

| | | | | |
|--|-------------|-------------|-------------|-------------|
| Program total | 3175 | 3280 | 3995 | 3760 |
| Certificate I in Hospitality | 60 | 45 | 85 | 75 |
| Certificate II in Hospitality | 290 | 215 | 260 | 195 |
| Certificate II in Kitchen Operations | 90 | 80 | 140 | 110 |
| Certificate III in Events | 25 | 30 | 20 | 15 |
| Certificate III in Hospitality | 1000 | 845 | 750 | 685 |
| Certificate III in Hospitality (Restaurant Front of House) | - | - | - | 10 |
| Certificate III in Commercial Cookery | 540 | 680 | 845 | 780 |
| Certificate IV in Hospitality | 305 | 380 | 460 | 430 |
| Certificate IV in Commercial Cookery | 870 | 1010 | 1435 | 1425 |
| Certificate IV in Kitchen Management | - | - | - | 40 |

40 to 49 years

| | | | | |
|---------------------------------------|-------------|-------------|-------------|-------------|
| Program total | 1335 | 1355 | 1565 | 1385 |
| Certificate I in Hospitality | 45 | 45 | 65 | 75 |
| Certificate II in Hospitality | 170 | 145 | 185 | 125 |
| Certificate II in Kitchen Operations | 65 | 60 | 115 | 85 |
| Certificate III in Events | 10 | 10 | 15 | 5 |
| Certificate III in Hospitality | 595 | 560 | 475 | 420 |
| Certificate III in Commercial Cookery | 150 | 130 | 205 | 195 |
| Certificate IV in Hospitality | 195 | 275 | 340 | 300 |
| Certificate IV in Commercial Cookery | 110 | 130 | 165 | 175 |
| Certificate IV in Kitchen Management | - | - | - | 5 |

50 to 59 years

| | | | | |
|--------------------------------------|------------|------------|------------|------------|
| Program total | 755 | 840 | 885 | 730 |
| Certificate I in Hospitality | 20 | 25 | 35 | 40 |
| Certificate II in Hospitality | 95 | 90 | 105 | 70 |
| Certificate II in Kitchen Operations | 45 | 50 | 60 | 55 |
| Certificate III in Events | 5 | 10 | 5 | 5 |

Table B | Hospitality-related program enrolments, age, Queensland, 2019 to 2022 (continued)

| Program name | 2019 | 2020 | 2021 | 2022 |
|--|------------|------------|------------|------------|
| Certificate III in Hospitality | 380 | 390 | 315 | 250 |
| Certificate III in Hospitality (Restaurant Front of House) | - | - | - | 5 |
| Certificate III in Commercial Cookery | 75 | 60 | 95 | 85 |
| Certificate IV in Hospitality | 110 | 180 | 225 | 195 |
| Certificate IV in Commercial Cookery | 20 | 40 | 45 | 30 |
| 60 to 64 years | | | | |
| Program total | 145 | 165 | 185 | 160 |
| Certificate I in Hospitality | 5 | 5 | 5 | 10 |
| Certificate II in Hospitality | 15 | 15 | 15 | 15 |
| Certificate II in Kitchen Operations | 10 | 5 | 5 | 5 |
| Certificate III in Events | - | 5 | - | - |
| Certificate III in Hospitality | 75 | 85 | 100 | 70 |
| Certificate III in Commercial Cookery | 10 | 5 | 10 | 15 |
| Certificate IV in Hospitality | 20 | 35 | 40 | 40 |
| Certificate IV in Commercial Cookery | 10 | 10 | 5 | 5 |
| 65 years and over | | | | |
| Program total | 35 | 45 | 55 | 75 |
| Certificate I in Hospitality | - | - | - | 5 |
| Certificate II in Hospitality | 5 | 5 | 5 | 10 |
| Certificate II in Kitchen Operations | 5 | - | - | 10 |
| Certificate III in Hospitality | 15 | 20 | 30 | 35 |
| Certificate III in Commercial Cookery | 5 | - | 5 | 5 |
| Certificate IV in Hospitality | 5 | 15 | 15 | 10 |
| Certificate IV in Commercial Cookery | - | - | 5 | - |

Source: National Centre for Vocational Education Research, 2024. VOCSTATS database. Adelaide: National Centre for Vocational Education.



