

YOUNG VOICES IN TOURISM

YOUNG PEOPLE'S PERSPECTIVE OF THE AUSTRALIAN TOURISM INDUSTRY



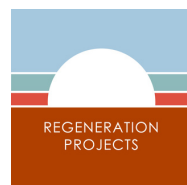
Photo courtesy of Tourism Greater Geelong & the Bellarine

A Collaboration - Young Tourism Network X Regeneration Projects

Edited by: Monash Sustainable Tourism Association

June 2021

YOUNG
TOURISM
NETWORK



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ACKNOWLEDGEMENT

We acknowledge the Land and Sea Country that is the backbone of Australia's tourism industry.

We acknowledge the diverse First Nations communities who are an inseparable part of these regions, and the keepers of living cultural connections through Elders past, present and emerging. We also acknowledge the many paths of migration of Australia's young tourism professionals and the shared path we now walk together towards a more sustainable and thriving future for All.



Photo by Rob Burnett, courtesy of the wukalina Walk

EXECUTIVE SUMMARY



KEY FINDINGS

28%

Believe young people are fairly treated in tourism in Australia.

74%

Felt that young people experienced similar or poorer outcomes than other tourism workers in 2020

26%

Believe young people have a strong voice in Australian tourism.



More young people are likely to dissuade someone from working in the tourism industry rather than recommend someone work in the industry.

94%

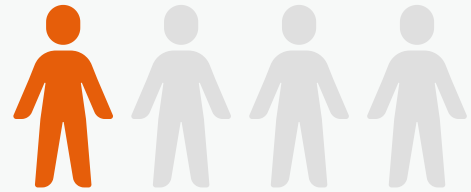
Say working for an ethical company is very or extremely important

44%

Believe that the industry is doing well in regard to reconciliation with First Nations Australians

55%

Believe that Australia's tourism industry was responding well in regard to diversity & inclusion



1 in 4

Think the Australian tourism industry is addressing climate change

9/10



Rating of the importance of sustainability in terms of tourism

6.7/10



Rating of how Australia is perceived as a sustainable tourism destination

98%

Regard growth opportunities and career progression as very or extremely important

SUSTAINABLE

Overwhelmingly the one word used to describe respondents' vision for tourism in Australia

Survey Sample size n=175

INTRODUCTION



INTRODUCTION

Young Tourism Voices Coming Together at a Pivotal Time

In 2019 the Victorian Government launched a Regional Tourism Review to find new ways to support tourism in regional Victoria, enhance private investment and create more jobs.

In response, a group of young tourism industry leaders came together to lead a submission to the Review on behalf of the young people of the Victorian tourism industry. A roundtable of students and young professionals from across the industry was formed. This group compiled and submitted a formal response to the Regional Tourism Review to ensure the needs of young people in the industry were represented.

In 2020, during the global pandemic and off the back of the roundtable for the Regional Tourism Review, these same young tourism industry leaders came together regularly to connect and share through what was called the 'Young Tourism Leaders Discussion Group'. This group included professionals from across Australia and provided support and connection by allowing space for sharing challenges, ideas and initiatives. These regular meetings highlighted that a snapshot of the views of young tourism professionals would be especially vital in industry recovery, enabling improvement and reimagining.

Now, in 2021, as we pause and set our course for a reimagined visitor economy, it's vital that the 'Future' (i.e. young professionals) is shaping the conversations about the Future. This report provides insights that will be presented to leaders at both a state and federal level to highlight the issues facing young people in tourism and how the industry can be more inclusive of young people in the decision-making process. This report has been led by the Young Tourism Network and Regeneration Projects, with input and collaboration with the Monash Sustainable Tourism Association and the Young Tourism Leaders Discussion Group. Further, we extend a sincere thank you to the industry mentors and leaders who were consulted throughout the process and offered their support.



Some of the participants from the 2019 Regional Tourism Review Young Professionals Roundtable

BACKGROUND

YOUNG PEOPLE ARE THE FOUNDATION OF AUSTRALIA'S VISITOR ECONOMY

Across Australia, the accommodation and food services industry is suffering from a 30-35% shortfall in staff due to the lack of international workers. Wes Lambert, CEO of the Restaurant and Catering Association in April said, “This has put [the hospitality and accommodation industry] in the perfect storm of not having enough semi-skilled and skilled hospitality workers to fill the overwhelming job vacancies that are approaching 100,000.” Largely, these workforces is dependent upon young people beginning their careers in tourism, hospitality and events.

Recent (March 2021) labour force figures highlight that those aged 16 to 24 have largely missed out on the rebound with the number of jobs still down 2.0% (39,700 jobs) compared to March 2020. This contrasts with jobs growth of 1.0% (114,000) across the rest of the labour market.

Over the coming years, Australia will need to deliver a world-class tourism experience to attract international travellers when borders reopen and persuade Australians to spend their time and money in Australia rather than in far-flung countries that offer superior experiences. For Australia to deliver a world-class tourism product, a well-trained, purpose-driven and capable workforce is required, which is why young Australians' needs and ideas need to be heard.

Young Australians in the tourism industry need to be retained and valued, with a renewed recognition of why young people choose to work where they work. Young people across all industries are increasingly choosing to work in industries where their values are represented in the place where they work. Research supports this internationally; in 2019, a study from KornFerry indicated that 63% of millennials (workers under 35) believe the primary purpose of businesses should be improving society instead of generating profit.

Research from the 2018 Deloitte's Millennial Survey highlights that “Australia's youth are pessimistic about the future and are discontented with businesses which are driven solely by profit and growth”. The 2020 iteration of this report, formed with input from 27,500 millennials worldwide, indicates that despite the immediate challenges of COVID-19 and individual hardships, the largest source of anxiety remains societal challenges. For example, 30% of Gen Z and Millennial respondents indicated climate change as their top concern for 2020.

This data highlights the framing scenario for this pilot study into the sentiments of young people in Australia's tourism industry. In summary, it looks to answer the question ‘how do young people feel about the tourism industry in Australia?’ The findings of this pilot study highlight a considerable risk to the future capabilities of the tourism workforce in Australia, with results indicating that young people are somewhat disillusioned with the industry and that the values of young people and the tourism industry appear to be increasingly distant.

A first of its kind, this research indicates a clear need for policymakers and businesses to further investigate why attracting and retaining young people in tourism is proving difficult. This research is designed to highlight one of the possible causes for this issue and prompt deeper discussion and engagement with young people working and looking to work in the Australian tourism industry.

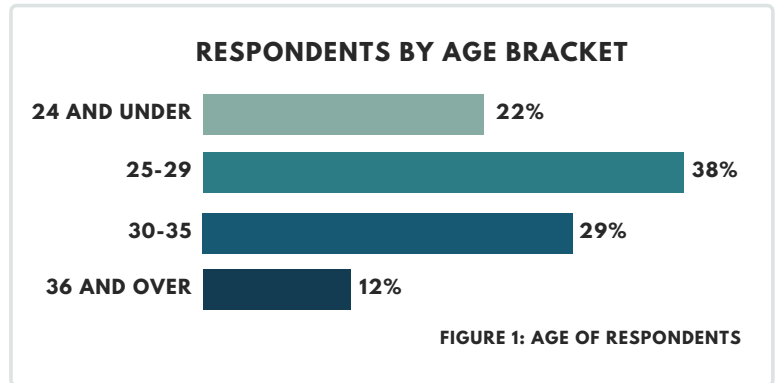
INSIGHTS



ABOUT THE SURVEY GROUP

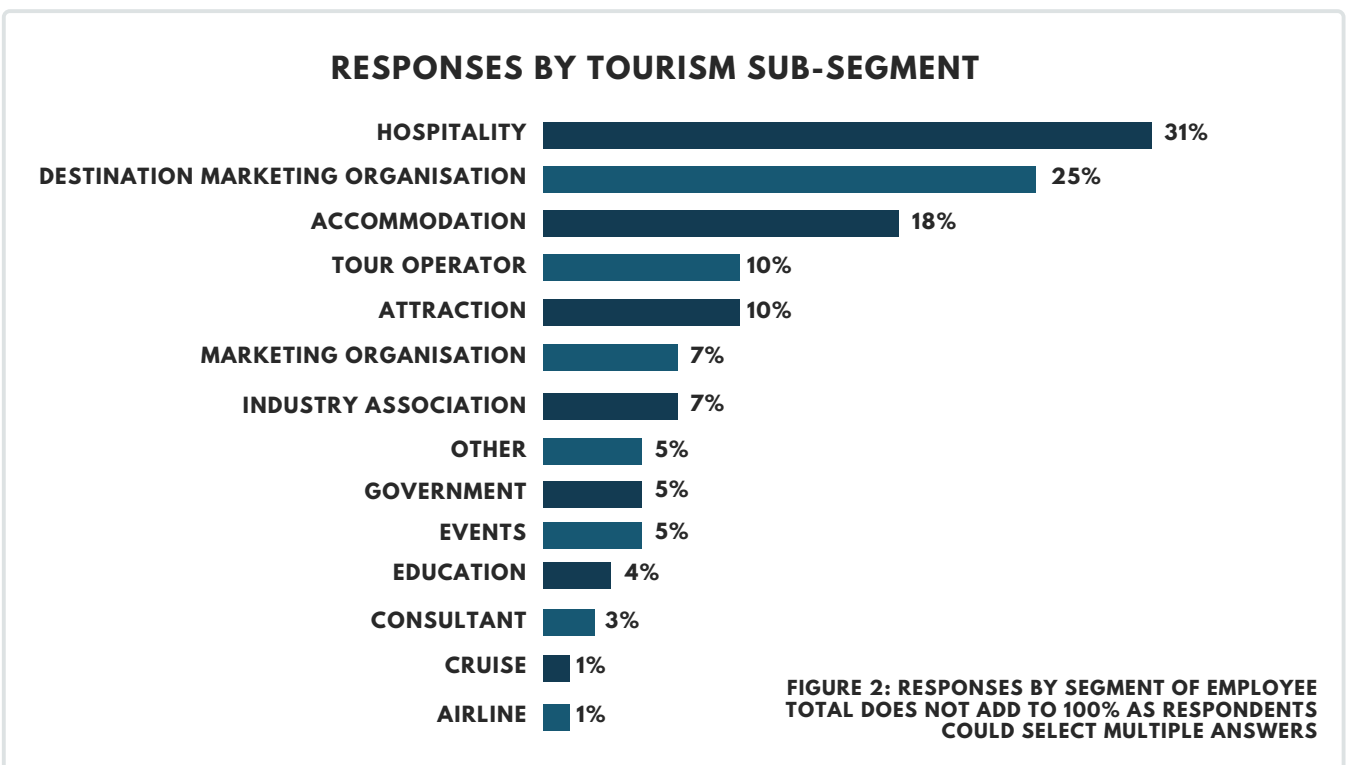
This pilot research was collected from responses by 175 individuals in the tourism industry between March 26th and April 29th 2021. March was pivotal for young people in tourism, with the end of JobKeeper on March 31st forecast to substantially impact tourism and hospitality workers.

The survey distribution focused on networks predominately comprising young professionals such as the Young Tourism Network, Young Australian Tourism Export Council, and various student organisations from institutions focusing on tourism and the visitor economy. The average age of respondents was 28 years old, with 89% of respondents being 35 years old or younger.



The majority (62%) of responses were located in Victoria, which is a limitation for a National perspective. However, it strengthens the analysis for Victoria. Three-quarters (75% of respondents) indicated that they were currently working in the tourism industry, while 18% were looking for work in the tourism industry. The remaining 7% indicated they were studying and not looking for work currently in the tourism sector.

31% of respondents worked in the hospitality sector, while a quarter worked in Destination Marketing. In addition, 15% of respondents selected more than one option, indicating a trend in the visitor economy that many young people work across multiple roles. A total of 75% of respondents indicated that they currently worked in the tourism sector, while the remaining bracket indicated they were either studying or looking for work in the tourism sector. Interestingly, 70% of respondents had studied or were currently studying a tourism-related discipline, with the remaining 30% not having studied tourism or a related field previously.



SECTION ONE

WHAT WAS IT LIKE TO BE A YOUNG PROFESSIONAL OR STUDENT IN TOURISM IN 2020?

A core part of this survey was designed to try and understand how it felt to be a young person working in the tumultuous period of 2020 and what their perspective and sentiment was for the coming period.

FOR YOUR PERSONAL WORK CIRCUMSTANCES, DO YOU THINK 2021 WILL BE BETTER OR WORSE THAN 2020?

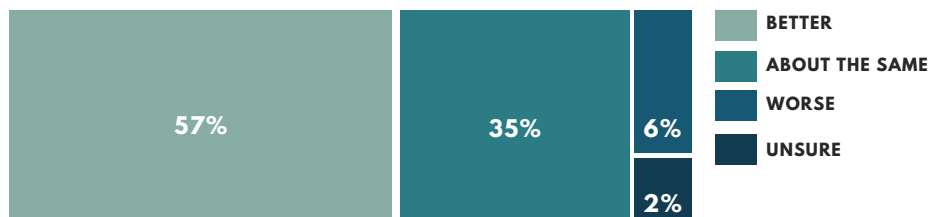


FIGURE 3: CAREER PERSPECTIVE ON 2021 VS 2020

Encouragingly, most respondents appear to feel that 2021 will be a better year than 2020, with 57% of respondents agreeing with this. Furthermore, regarding job security in the current environment, a third (32%) of respondents were 'extremely confident' in their job security, while an additional 43% indicated they were very confident. On the other hand, a total of 15% reported feeling either not very or not at all confident in their job security.

A quarter of respondents reported feeling extremely valued as tourism, hospitality, and event professionals, while 37% reported feeling highly valued. However, concerningly 1-in-6 respondents felt not very or not at all valued in their profession, with this rising to nearly 1-in-4 for respondents aged 24 years or younger (24%).

“ Tour Operator Worker Age 30

“For the amount of professional development I have completed and continue to do to maintain a professional point of view to then be working alongside someone with no experience or qualifications is quite disheartening. It was a minimum requirement to have these skills and quals now it's just fill positions and take people outside.”

“ Events Worker Age 20

“I feel as though working in an industry so volatile to the restrictions of COVID-19 has devalued staff, especially those on a casual basis”

Respondents, in general, felt that during 2020, young people working in tourism experienced poorer outcomes than other workers in the tourism sector. A telling 38% of respondents indicated this, while only 6% said that young people experienced better outcomes than others. 36% of the sample said that young people experienced similar outcomes to other workers (See Figure 4).

Young people are more likely to be in casual or entry-level positions of work in the tourism industry. During 2020, the negatives of these circumstances became clear, with these positions most likely to experience reduced hours or be made redundant owing to their lack of permanency.

WHEN YOU REFLECT ON 2020, HOW DO YOU THINK YOUNG PEOPLE WORKING IN TOURISM FARED IN TERMS OF THEIR TREATMENT?

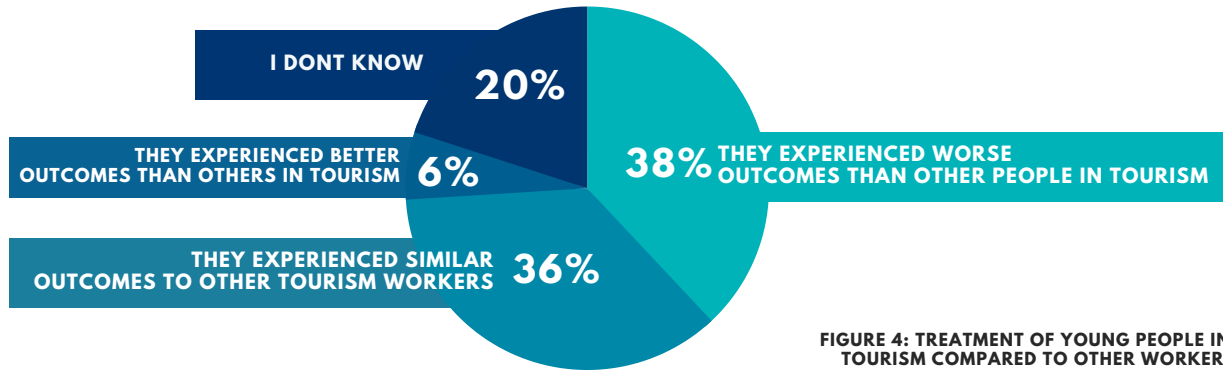


FIGURE 4: TREATMENT OF YOUNG PEOPLE IN TOURISM COMPARED TO OTHER WORKERS

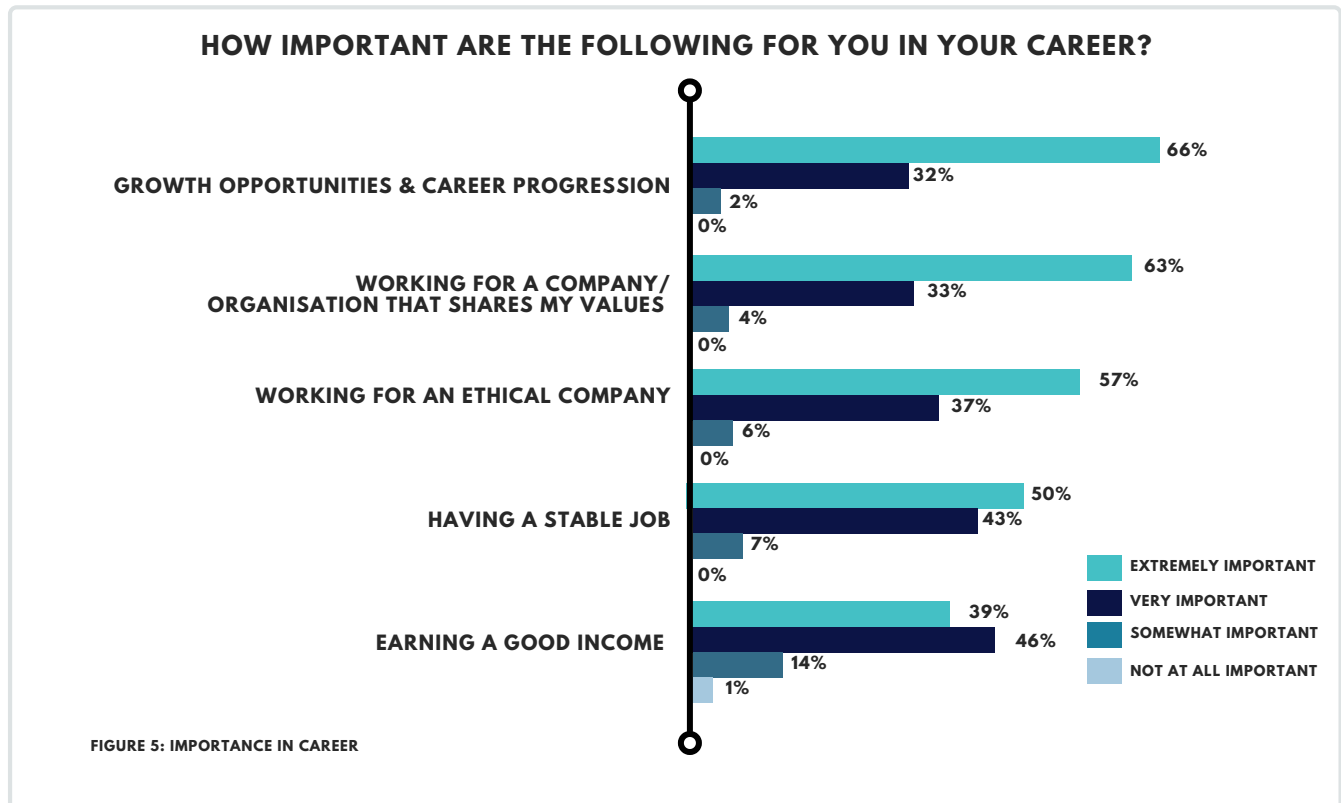


SECTION TWO

WHAT DO YOUNG PEOPLE VALUE IN THE TOURISM INDUSTRY?

Growth opportunities and careers progress was regarded as Very or Extremely important by 98% of respondents while working for an organisation that shares the values of young people was deemed important by 96% of respondents.

Working for an ethical company was Very or Extremely important for 94% of respondents. While earning a good income was still regarded as important, it was the least important aspect of the five options presented.



Several other themes emerged through qualitative responses in this section. Firstly, personal growth, including career development and growth within an organisation, was a common response. One respondent expressed importance in “diversity in career growth such as the ability to pivot, move sideways and gain skills from experiences that are outside of your day-to-day tasks”. Similarly, many respondents noted training, education and upskilling as important to career development.

WHEN RESPONDENTS WERE ASKED: IS THERE ANYTHING ELSE IMPORTANT TO YOU FOR CAREER DEVELOPMENT?

“ Consultant
Age 34

“Feeling part of an industry that leads on important issues like Climate Action and Reconciliation”

“ Student
Age 27

“Employ technology to increase efficiency of the operation in a company or organisation”

“ Events Professional
Age 26

“Direct managers that are progressive, communicate openly and are continuously supportive”

Secondly, mentorship within the industry and thirdly a sense of having a network and community were also highlighted as important to career development for respondents.

Having adequate support and a cohesive team and management were also mentioned repeatedly by respondents as important to their career development. One respondent noted that the key to their successful development would be “direct managers that are progressive, communicate openly and are continuously supportive”. Additionally, some respondents stated that work-life balance and time flexibility are important to them.



30%

THINK THEY WILL NEED TO STUDY MORE TO PROGRESS IN THEIR TOURISM CAREER

67%

FEEL THEIR TOURISM RELATED COURSE IS PREPARING OR HAS PREPARED THEM TO WORK IN THE TOURISM SECTOR

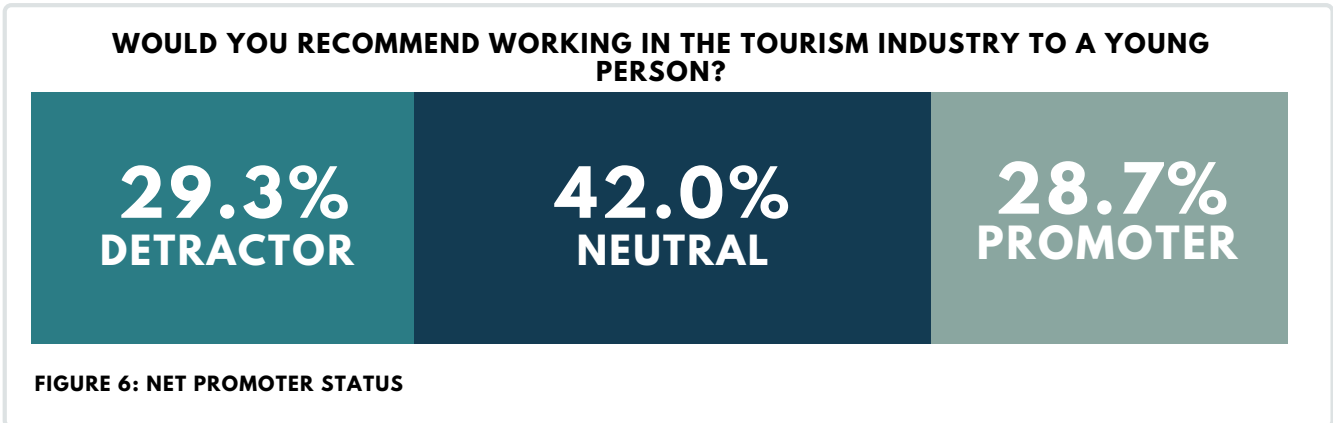
35%

ARE NOT SURE IF THEY NEED TO STUDY MORE TO PROGRESS IN THEIR TOURISM CAREER

SECTION THREE

HOW DO YOUNG PEOPLE VIEW THE TOURISM INDUSTRY AND WHY?

Respondents were asked if they would recommend working in the tourism industry to a young person, with responses coded using the Net Promoter Score framework, a standard practise to determine the likelihood of determining how likely an individual is to recommend an experience.



This score is based on a rating of 0-10 where a respondent is classed as one of the following in answer to the question: *Would you recommend working in the Tourism Industry to a young person?*

Each respondent, based on their answer is given the following status:

- **Promoters** are typically loyal and enthusiastic.
- **Neutrals** are satisfied with the career but would not advocate for it publicly.
- **Detractors** are unhappy workers who are unlikely to stay in the industry and may even discourage others from joining the industry.

The above chart highlights that 28.7% of respondents would recommend a young person work in the tourism industry, while 29.3% of respondents would be more likely to dissuade someone from working in the tourism sector. This is a telling finding that needs to be rectified.

This highlights the need to ensure people working in tourism themselves feel valued, appreciated and listened to as this will correlate to more people becoming advocates for working in the sector which will assist in attracting more people in to the industry, and retaining existing workers.



Post- GraduateStudent

“Hyper-focused on the numbers and the money that the visitors bring”



Post- GraduateStudent

“The industry seems to talk about people as cogs in a business machine”



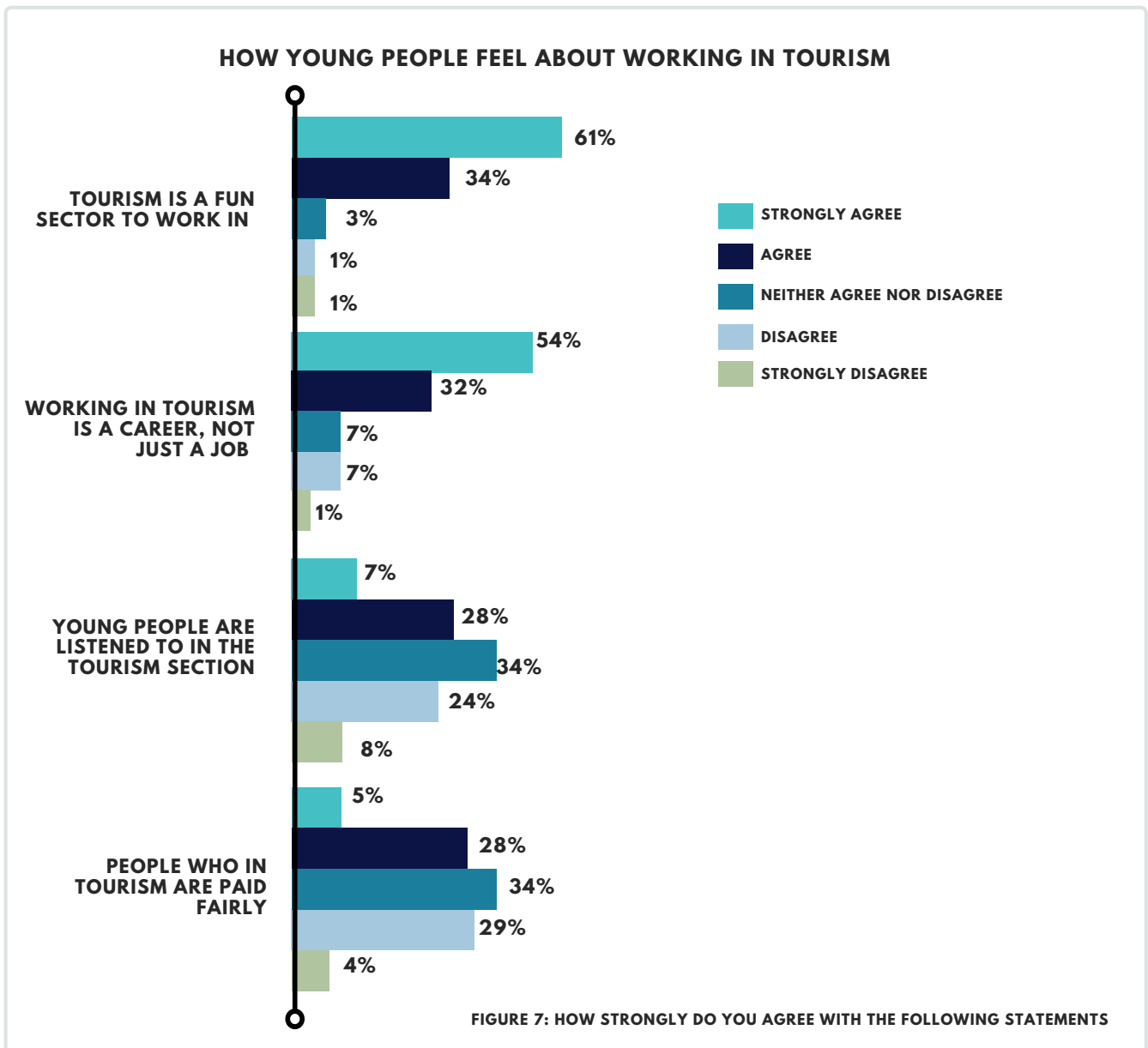
Post- GraduateStudent

“Have a balanced leadership team with all ages and sexes in decision making roles”

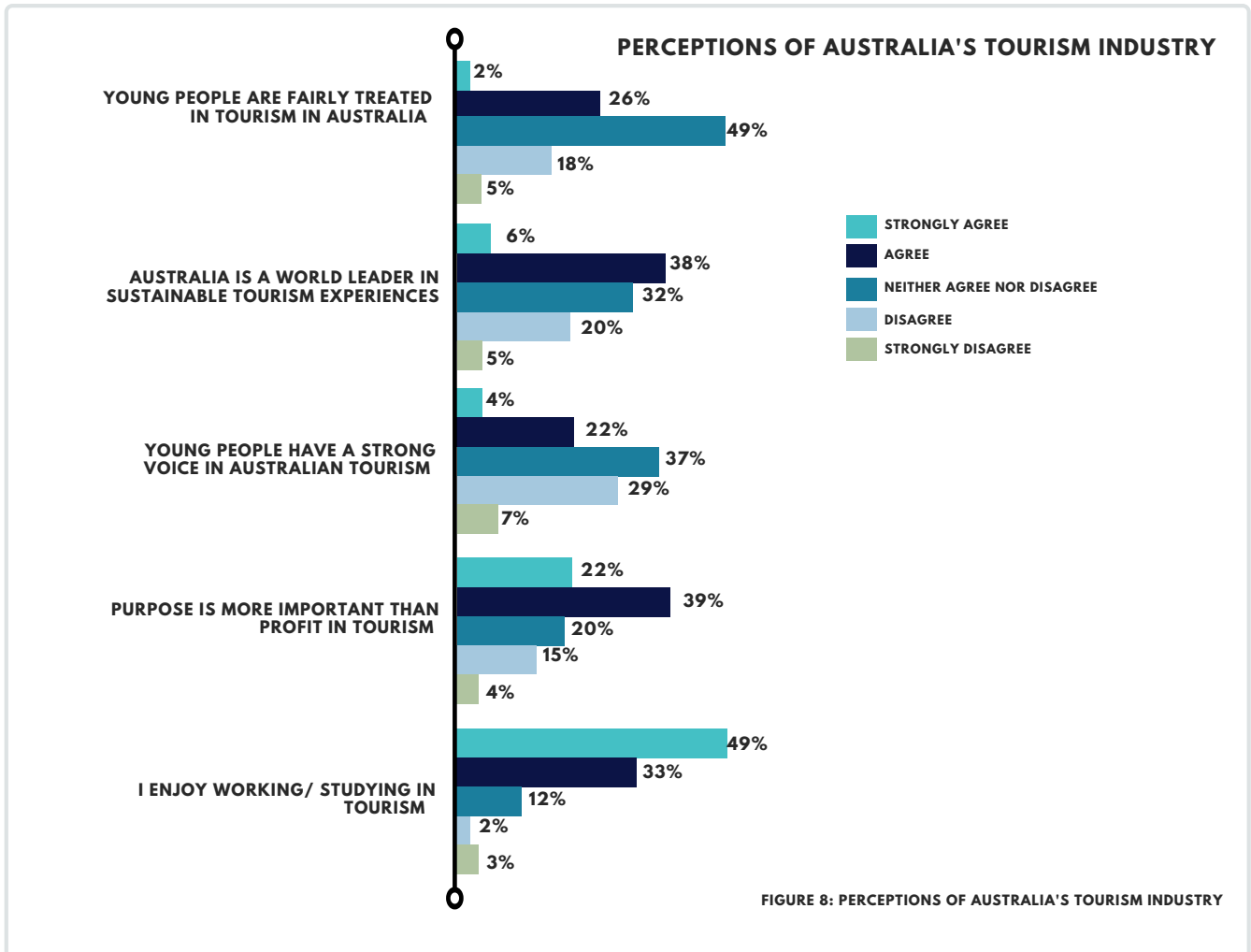
What are the reasons for this?

To assess the potential reasons for respondents' general tepidness with working in the tourism industry, a series of follow-up questions were answered, which is presented in figure 6 above. The results highlight that the vast majority (95%) of respondents believe the tourism industry is a fun sector to work in. Similarly, 86% agree that working in tourism is a career, not just a job.

However, a lukewarm response was received regarding the pay of tourism professionals, with the split of a third each-way responding to whether tourism workers were paid fairly. Similarly, only 32% of respondents said that young people in tourism were listened to, while 35% disagreed with this sentiment.



Key Finding: While tourism is still perceived as a ‘fun’ industry to work in, this may not be enough to entice young people to stay or enter the industry as the industry is perceived as a serious career rather than a temporary job by most (85%) of respondents.



The above questions highlight young people’s perception of tourism in Australia and demonstrate once again that young people do not feel fairly treated, with only 28% of respondents indicating they thought they were. This is further strengthened with the finding that only 26% of respondents believing that young people had a strong voice in Australian tourism.

Looking at questions around sustainability highlights that only 6% of respondents thought that Australia was a world leader in sustainable tourism, while 61% of people believe that purpose is more important than profit in tourism. Again, tourism shone through as an enjoyable sector to work in, with 82% of respondents agreeing to this. However, the industry and businesses within the sector need to ask the question; is this enough to persuade young people to stay in or enter the tourism workforce?



— “

"Sustainability means doing less harm to the local environment, community and cultures. But it's not enough. We should be aiming for regenerative tourism that creates flourishing destinations"

- Young Professional from Survey Feedback

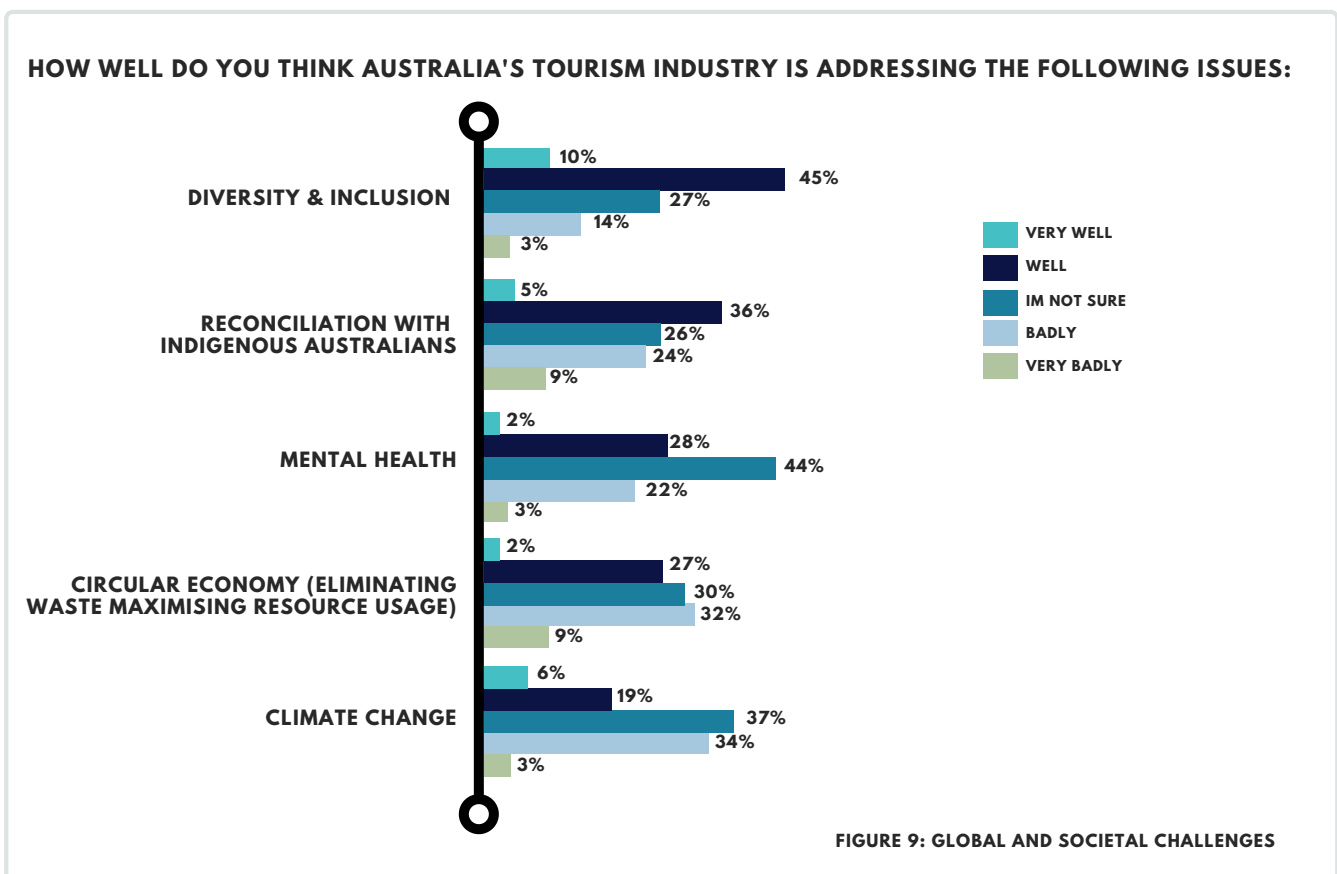
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SECTION FOUR

GLOBAL AND SOCIETAL ISSUES

Looking deeper into some perceptions of how Australia's tourism industry is dealing with global and societal issues revealed that the majority of respondents in tourism tended to think the tourism industry could do more in the face of climate change, and issues relating to the circular economy. However, most respondents thought that Australia's tourism industry was doing Well or Very Well in regard to diversity & inclusions (55%) and 41% said that the tourism industry were doing well in regard to reconciliation with Indigenous Australians.

Mental health was relatively evenly split, with 30% of respondents thinking the industry was responding to this challenge, while 25% disagreed.



The above highlights that many young people in tourism believe that the industry could do more to help play its part in global challenges. To explore this deeper, a series of questions regarding sustainability was asked about how they, as individuals and their workplace & the broader tourism industry, understood sustainability and how it was being applied in their view.

SECTION FIVE

HOW IMPORTANT IS SUSTAINABILITY FOR YOUNG PEOPLE?

In line with previous studies that identify purpose beyond profit being a strong motivator for young people, respondents identified sustainability as a very important part of their personal lives. For the purposes of this study, 'Sustainability' was deliberately kept broad but it's assumed to include equal consideration of people, place, planet and profit. (Young professionals also commonly refer to sustainability as a triple-bottom-line approach to business).

Unprompted, respondents indicated that their 'one-word vision' for tourism in Australia was, overwhelmingly, sustainable. This was a free text entry; however, 'sustainable' or 'sustainability' received nearly a quarter of all responses (24%). The next highest single word was 'inclusive' with 6% of responses.



FIGURE 10: "PLEASE WRITE ONE WORD THAT DESCRIBES YOUR VISION FOR TOURISM IN AUSTRALIA"

Sustainability was a clearly important part of respondents' personal lives, with the average of 8.6 out of 10. Similarly, sustainability was rated a 9/10 in terms of importance in the industry context. There was a clear discrepancy amongst the perception of Australia as a sustainable tourism destination, however, with Australia being rated only 6.7 out of 10.

IMPORTANCE OF SUSTAINABILITY

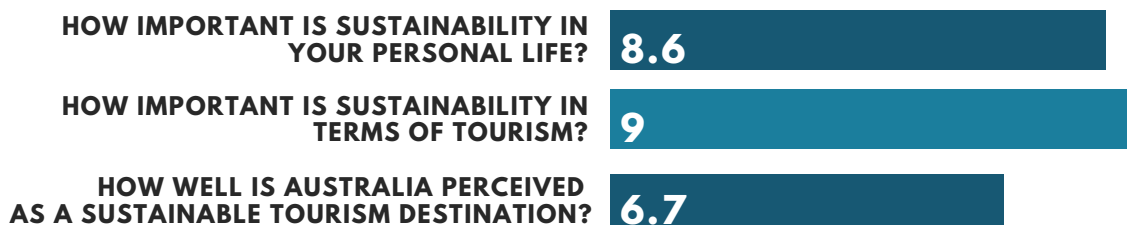


FIGURE 11: SUSTAINABILITY & TOURISM

Further to this was the finding that only 54% of respondents believed that their organisations took a sustainable approach to tourism. This indicates another fracture between the relationship of young people working in the tourism industry and the broader tourism sector.

Not negatively impacting travel destinations, the world's resources are currently finite so we need to make sure any developments do not have negative impacts otherwise we'll run out of planet to travel to, and to live on

Operating with integrity, building back in to degraded landscapes and leaving things not just as you found them, but better off

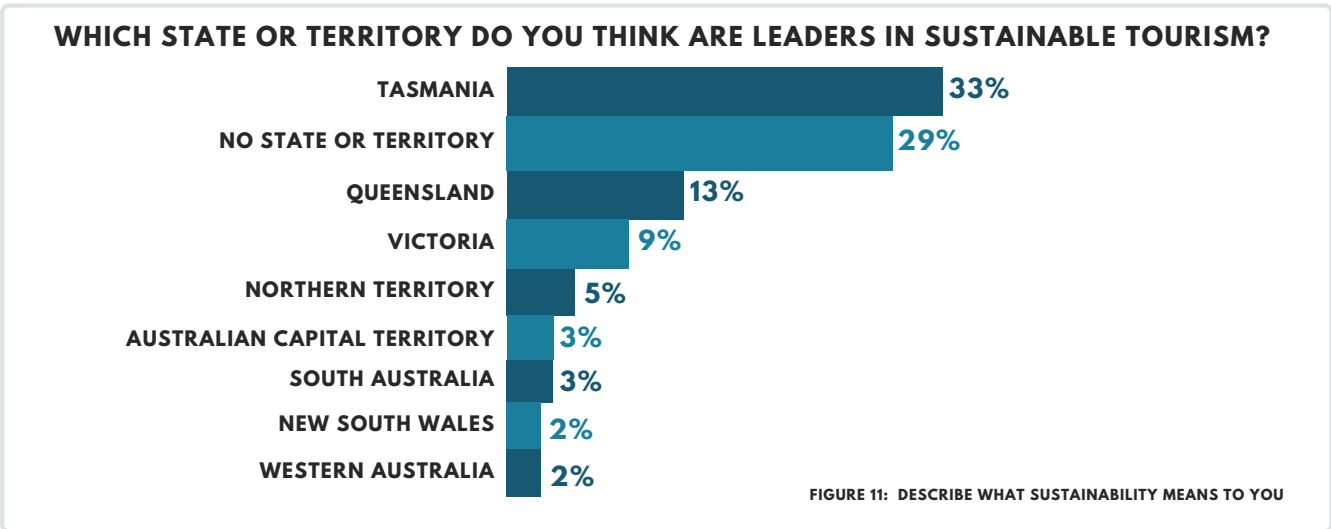
Mother Earth and human beings are happy and in harmony

Actively engaging with and supporting First Nations People to participate in decision-making and operation of tourism ventures, management of their heritage landscapes, and in any case, ensuring that they experience benefit

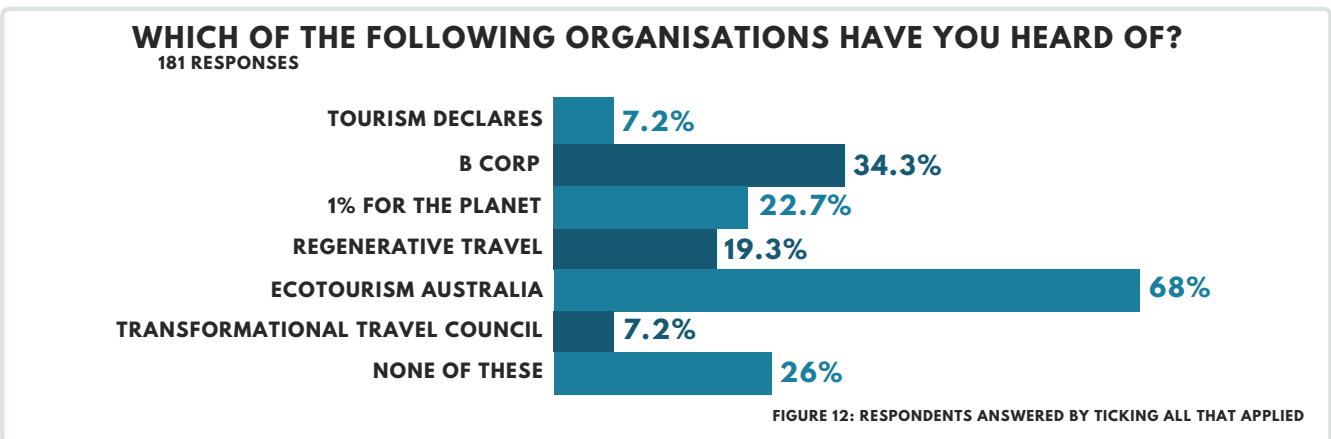
I'm all for sustainability but some aspects of it have been commercialised with lack of true effects or effort to make a difference

Photo courtesy of Echidna Walkabout and Tourism Greater Geelong & the Bellarine

Looking at a state perspective, Tasmania was regarded as being the leader in sustainable tourism by a third of all respondents. However, 29% said that 'no state or territory' was regarded as a leader when asked about this.



In terms of organisations that operate in the sustainability space from an accreditation perspective, the most well-known was Ecotourism Australia, with 68% of respondents having heard of this organisation. Second to this was B Corp (34%) and 1% for the Planet (23%). Slightly more than a quarter (26%) of respondents had not heard of any of these organisations.



Following up on this, the vast majority (92%) of respondents agree that businesses in the tourism industry need assistance to become more sustainable. With the following suggestions being the most popular from survey respondents:

- #1 A list of recommended tools, accreditations and services (79.2% of respondents)
- #2 A national sustainable tourism resource hub (77% of respondents)
- #3 Industry research on best practise/issues and opportunities (74.2% of respondents)

This highlights a path forward for accreditations and industry associations that work across this area as a way to demonstrate that their certifications are worth more than the paper they are written on and actually contribute towards helping a business become more sustainable.

Tourism Australia's new strategic pillars of 'Sustainability' and 'Indigenous Tourism' are waymakers in this direction, but these must also be accompanied by genuine cultural shifts within businesses and organisations which positively impact strategy, performance measurement, operational capabilities and customer experience.

ACTIONS



RECOMMENDED ACTIONS

These actions will strengthen the security of the Australian tourism workforce, increase engagement with young professionals and provide a solid foundation for the industry's regeneration post-COVID

INDUSTRY LEVEL

- **Representation:** Find ways to give voice to young tourism professionals and structurally embed youth within strategic decision-making processes at all levels of the industry.
- **Values:** An industry-wide refocus toward sustainability and purpose over profit accordant with the expectations of young people to reposition Australia as a leader in sustainable tourism.
- **Intergenerational Collaboration:** To accelerate the transition to a more sustainable tourism industry, we need to embrace the strengths and skills of young professionals.

OPERATOR LEVEL

- **Career Development:** Australian tourism operators should invest in their young professionals' career development and growth to attract and retain talent. This involves clear pathways for training, education, upskilling and mentorship, with support from Government and local training providers.
- **Purpose:** Operators will strengthen their attractiveness as an employer of choice if they demonstrate their values and alignment to sustainability with transparency. For example, with integrated annual reporting.

GOVERNMENT LEVEL

- **Industry Linkages:** Students need to be provided with more opportunities to enter the tourism sector, especially through internships and industry placements. This needs to be accompanied by work experience opportunities with reputable tourism organisations to better equip them with the skills necessary to have a long and successful career.
- **Knowledge-Sharing:** Establish a national sustainable tourism resource hub to demonstrate best-practice examples for destinations at national, state and regional scales as well as individual operators and professionals.