Tourism, Travel and Hospitality Workforce Planning Update 2026

SaCSA
Service and Creative Skills Australia



About SaCSA

Service and Creative Skills Australia (SaCSA) is an industry-owned, industry-led Jobs and Skills Council funded by the Department of Employment and Workplace Relations. We offer workforce planning, guidance and advocacy for the arts, personal services, retail, tourism and hospitality industries.

Working within a tripartite approach, SaCSA is the critical link between industry stakeholders, government and unions, strengthening Australia's vocational education and training sector and delivering stronger outcomes for employers, workers, learners, trainers and educators.

As the leader in workforce development initiatives for our industries, SaCSA collaborates with industry to identify and articulate current and future employment trends and develop solutions that best serve those needs.

Acknowledgements

SaCSA extends its gratitude to the industry, union and government representatives who provided their help in formulating our Tourism, Travel & Hospitality Workforce Planning Update 2026.

We also acknowledge the Traditional Owners of the Country, including lands and waters, where we work and live.

We acknowledge the valued partnership of the Australian Government Department of Employment and Workplace Relations, whose funding supports SaCSA's role as a Jobs and Skills Council.

Disclaimer

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CEO foreword

I am pleased to present SaCSA's Tourism, Travel and Hospitality Workforce Planning Update 2026 (Workforce Plan). This report builds on our previous workforce planning and reflects a maturing evidence base about the opportunities and challenges shaping these sectors.

The outlook is one of both growth and change. Tourism and travel employment and visitor demand continue to grow, while hospitality remains one of Australia's largest employing sectors. National and state visitor economy strategies point to continued growth over the longer term, and major events such as Brisbane 2032 will create additional workforce demand and opportunities.

At the same time, employers continue to face recruitment and retention challenges, particularly in key occupations, and regional and remote areas. Businesses are also navigating rising costs and changing consumer expectations, while the pipeline of workers entering through vocational education and training (VET) remains a concern.

Technology is adding another dimension to this change. Artificial intelligence, automation and digital tools are reshaping how businesses operate and how work is performed. These technologies can support productivity and create new opportunities, but they also reinforce the importance of the distinctly human capabilities at the heart of tourism, travel and hospitality. Communication, judgement, adaptability, problem-solving, leadership and exceptional customer service will remain critical.

Against this backdrop, workforce planning cannot focus on shortages alone. We need to understand how people enter these sectors, how they develop their skills and careers, what influences whether they stay or leave, and how training and employment pathways can better respond to the changing needs of workers and employers.

SaCSA's work is increasingly focused on building this deeper understanding and translating evidence into targeted responses. Over the past year, we have examined career pathways and workforce mobility, persistent occupational shortages, perceptions of careers, connections between schools and industry, the future workforce needs of the visitor economy, and the role of training in preparing people for changing workplaces.

We are also making workforce evidence more accessible. Launched in February, SaCSA's interactive Data Dashboard brings together data from the Australian Bureau of Statistics, National Centre for Vocational Education Research, Jobs and Skills Australia and industry reports. It provides insights into the industries, occupations and qualifications within SaCSA's remit to support evidence-based decision-making by industry, educators, policymakers and researchers.

SaCSA continues to work to ensure nationally recognised training reflects contemporary industry practice. As the Jobs and Skills Council responsible for the tourism, travel and hospitality training package, we bring together industry, unions, training providers, learners and government to help ensure training products remain relevant, responsive and fit for purpose.

This Workforce Plan brings these strands of work together. It combines labour market and VET data with the experience and insights of employers, workers, unions, industry associations, education and training providers, governments and other stakeholders. This enables us to look beyond individual indicators and better understand how workforce supply, skills, participation, technology, working conditions and economic pressures interact.



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The evidence points to clear priorities: strengthening workforce supply, attraction and career pathways; ensuring skills and training keep pace with changing capability requirements; broadening workforce participation; addressing regional workforce challenges; and supporting retention, wellbeing and workforce resilience.

Building a sustainable workforce is about more than attracting new workers. It requires visible and rewarding career pathways, relevant training, supportive workplaces and broader participation, alongside the capacity for businesses and workers to adapt as these sectors evolve.

Workforce planning is therefore an ongoing process of listening, analysing, testing and responding. The evidence presented in this Workforce Plan will continue to inform SaCSA's workforce projects, training product development and industry stewardship, as well as the advice we provide to government.

I thank the employers, workers, unions, industry associations, education and training providers, government representatives and other stakeholders who continue to share their expertise and experience with us. Their contribution ensures our work remains grounded in the realities of these diverse sectors.

By working together, we can strengthen pathways into and through tourism, travel and hospitality and build the skilled, adaptable and resilient workforce needed to support their long-term growth.

Natalie Turmine
CEO

About the Workforce Planning Update

Workforce planning is a central part of SaCSA's role in understanding and responding to the workforce and skills needs of the sectors SaCSA serves. It brings together industry experience, stakeholder insights and data to build a clear picture of what is happening now, what is changing and where action can make the most difference.

This Workforce Plan builds on SaCSA's previous workforce planning work and reflects what we have learned through ongoing engagement with employers, workers, unions, industry associations, education and training providers, government and other stakeholders. Their perspectives help us and our industry leaders understand workforce challenges in context and identify practical opportunities grounded in the realities of the sector.

SaCSA combines these insights with economic, labour market and vocational education and training data to identify current and emerging trends, test what we are hearing from industry and highlight areas where further research, collaboration or action may be needed.
The Workforce Plan considers both immediate workforce pressures and the longer-term forces shaping the sector, including changing skills needs, technology, workforce participation and broader economic and policy settings.

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SaCSA's engagement across Australia

SaCSA's workforce planning is grounded in extensive and ongoing engagement with stakeholders across Australia. Over the past year, SaCSA engaged with more than 4,100 stakeholders across every state and territory, bringing together a broad range of voices, experiences and perspectives from across the industries we represent.

Our engagement reaches metropolitan, regional and remote communities and includes large, medium and small employers, workers, unions, industry associations and peak bodies, education and training providers, learners, government representatives and other Jobs and Skills Councils. SaCSA also seeks to ensure that perspectives that may be underrepresented in traditional consultation processes are heard, including First Nations and culturally and linguistically diverse communities, people with disability, people in regional and remote Australia, and other priority cohorts relevant to our industries.

Engagement takes place throughout the year and through multiple channels, including industry events, roundtables, workshops, webinars, surveys and conferences, as well as SaCSA's Strategic Workforce Advisory Groups, technical committees and project reference groups. This combination of broad engagement and more focused consultation enables SaCSA to hear directly from industry, explore issues in depth and understand how workforce experiences and challenges differ across occupations, locations, business types and workforce cohorts.

Stakeholder voices, insights and perspectives are embedded throughout SaCSA's work and have directly shaped the development of this Workforce Plan. Workforce data and research have been tested against the experiences of industry, and the workforce challenges identified in this plan have been discussed and validated through stakeholder engagement. This process helps ensure that the issues presented are not considered through data alone, but reflect the experiences, priorities and concerns of the people and organisations working across the industry.

These insights have also shaped the priorities and actions identified in this Workforce Plan, helping SaCSA focus on the areas where industry has told us action is most needed and where workforce and skills responses can have the greatest impact.



Defining the tourism, travel and hospitality workforce

Australia's tourism, travel and hospitality workforce supports both international travel and the domestic visitor economy. It spans a broad range of interconnected industries that provide goods and services to local communities and to people travelling for purposes including leisure, education, business and employment.

There is no single Australian Bureau of Statistics (ABS) industry classification or definition that captures the full tourism, travel and hospitality workforce. To estimate its size and composition, SaCSA draws on a combination of statistical frameworks and classifications.

The primary framework is the ABS Tourism Satellite Account, which measures the economic contribution of tourism to the Australian economy. This is supplemented by the Australian and New Zealand Standard Industrial Classification (ANZSIC) and ABS Labour Force Survey data. Consistent with stakeholder feedback, this approach provides a broader view of the workforce across the diverse industries that contribute to tourism, travel and hospitality.

Using this approach, the broader tourism, travel and hospitality workforce is estimated to comprise more than 1.3 million employed people. It spans a diverse range of subsectors, including travel agency and tour services; cafés, restaurants and takeaway food services; accommodation, pubs, taverns and bars; retail trade; cultural services; transport; education and training; and outdoor recreation.

For the purposes of this Workforce Plan, the analysis focuses on:

- **tourism and travel:** workers employed in travel agency and tour arrangement services, event and conference organisation, and amusement and other recreation activities
- **hospitality:** workers employed in accommodation, cafés, restaurants and takeaway food services, pubs, taverns, bars and clubs.

Other subsectors in the broader tourism, travel and hospitality workforce are addressed through SaCSA's other industry Workforce Plans or fall within the remit of other Jobs and Skills Councils. For example, parts of the travel sector, including aviation, road, rail and water transport, are covered by Industry Skills Australia.

Important data notes

Data currency

Unless otherwise stated, the data presented in this Workforce Plan reflects the latest available information as of September 2026.

2021 Census data

The 2021 Census was conducted during the COVID-19 pandemic, when employment across the tourism, travel and hospitality sectors was significantly disrupted. As a result, Census-based figures may not reflect typical workforce conditions and should be interpreted with caution, particularly when analysing workforce trends or informing decisions.

Part 1: Tourism and Travel Workforce Planning Update 2026

Executive summary

Australia's tourism and travel sector continues to grow, supported by rising visitor expenditure, increasing outbound travel and a positive longer-term outlook. Tourism workforce reached 726,300 filled jobs in the June quarter 2026,[1] while employment across SaCSA's tourism occupations is projected to grow by approximately 9.9% between May 2025 and May 2035.[2] Continued growth in domestic, international and outbound travel will increase the need for a skilled, adaptable workforce to meet industry demand and support sustainable growth.

Recruitment pressures have eased from their post-pandemic peak, but challenges remain across key occupations and locations. Tour guides and travel consultants were identified as being in shortage nationally in 2026,[3] while regional and remote employers continue to experience greater recruitment difficulties than employers in major cities.[4] Recent recruitment data also indicates continued demand for travel consultants, tour guides and conference and event organisers, despite some easing in advertised vacancies.[5]

These workforce pressures are occurring within a challenging economic environment. Rising operating costs, subdued business and consumer confidence, and cost-of-living pressures are affecting both businesses and households.[6, 7, 8] For tourism and travel businesses, particularly small and medium-sized businesses, these conditions may constrain investment, recruitment and workforce development even as the visitor economy continues to expand.[9]

The training pipeline is also weakening. Tourism and travel-related vocational education and training (VET) enrolments continued their longer-term decline in 2025, and traineeship commencements were well below historical levels.[10] Without stronger entry pathways and closer alignment between training and industry needs, future workforce growth may increasingly depend on a limited pipeline of new entrants and the capacity of employers to develop skills within the workplace.

Government policy settings are also influencing workforce supply and development. Changes to migration and visa arrangements, including higher costs and tighter working holiday maker settings, may constrain access to workers, particularly in regional areas. At the same time, reduced employer traineeship incentives and changes to eligibility from January 2027[11] may discourage investment in training and weaken entry pathways into the industry. These developments reinforce the importance of strengthening domestic workforce pipelines while maintaining effective migration pathways.

At the same time, the skills that tourism and travel businesses need are changing. Artificial intelligence , automation and digital technologies are reshaping tasks and business models, while customer expectations around service, accessibility, sustainability and culturally responsible experiences continue to evolve. Digital capability will become increasingly important, alongside communication, judgement, adaptability, problem-solving, customer service and leadership.[12] Training and workforce development will need to keep pace if businesses are to realise the benefits of technology while maintaining the human capabilities that underpin high-quality traveller experiences.

Together, the research, evidence and insights from industry stakeholders point to 4 interconnected workforce priorities for the tourism and travel sector:

- strengthen workforce supply, attraction and career pathways
- ensure skills and training keep pace with changing capability requirements
- broaden participation and address regional workforce challenges
- improve workforce retention, wellbeing and resilience.

1 Australian Bureau of Statistics (ABS), *Quarterly Tourism Labour Statistics (rounded)*, June 2026.
2 Jobs and Skills Australia (JSA), *Employment Projections May 2025 to May 2035*, 2025.
3 JSA, *Occupation Shortage List (OSL)*, 2026.
4 JSA, *Recruitment Experience and Outlook Survey (REOS)*, June Quarter 2026.
5 Lightcast, *Job Postings Analytics*, July 2026.
6 National Australia Bank (NAB), *Quarterly Business Survey*, Q2 2026.
Note: The NAB Quarterly Business Survey reported business confidence of +1 in Q2 2025 and –19 in Q2 2026, while business conditions remained at +2 over the same period. Expectations for business conditions over the following 12 months also weakened, falling from +17 in Q1 2026 to +5 in Q2 2026.
7 Westpac-Melbourne Institute, *Consumer Sentiment*, August 2026.
8 Melbourne Institute, *Survey of Consumer Inflationary and Wage Expectations*, accessed via Trading Economics, 20 August 2026.
9 Tourism Research Australia (TRA), *Tourism Forecasts for Australia*, 2025.
10 National Centre for Vocational Education Research (NCVER), VOCSTATS, *Total VET Activity, 2026; Apprentices and Trainees*, December Quarter 2025.
11 Department of Employment and Workplace Relations (DEWR), *Changes to Australian Apprenticeships Incentive System from 1 January 2027 (Factsheet)*, May 2026.
12 JSA, *Our GEN AI Transition – Skills*, 2025.



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These priorities require action across the workforce lifecycle, rather than isolated responses to individual shortages. SaCSA will continue to work with industry, government, unions and the education and training sector to strengthen the evidence base, improve career and training pathways, develop responsive training products and identify practical responses to persistent workforce challenges.

The objective is not simply to increase worker numbers. It is to build a tourism and travel workforce with the skills, pathways and resilience required to support the continued growth and transformation of Australia's visitor economy.

Explore workforce data and detailed industry, occupation and qualification insights online

SaCSA's interactive Data Dashboard brings together data from the Australian Bureau of Statistics, National Centre for Vocational Education Research, Jobs and Skills Australia and industry reports. Explore workforce trends, occupations, qualifications and skills data across SaCSA's sectors to support evidence-based workforce planning and decision-making.

Scan the QR code to explore the SaCSA Data Dashboard.

The forces shaping the tourism and travel workforce

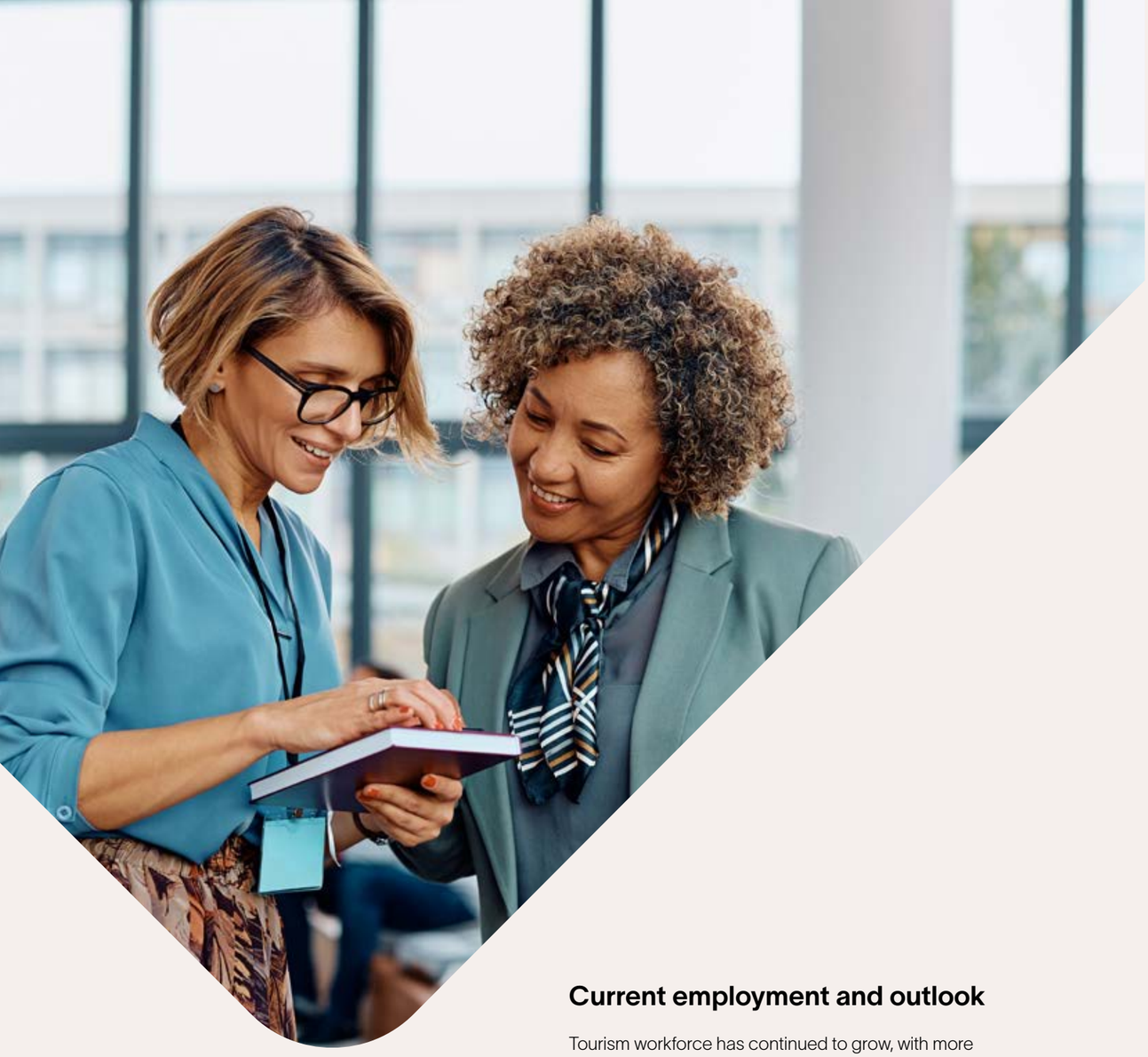
Economic and labour market conditions

The tourism and travel labour market has continued to strengthen. Employment has grown over the past year, and recruitment demand remains strong for key occupations. Recruitment pressures have eased from post-pandemic peaks but remain elevated in some occupations and locations.

At the same time, rising business costs, subdued consumer demand and weaker business confidence are creating a more challenging operating environment. These pressures may constrain employers' capacity to recruit, train and invest in their workforce, despite continued growth in the visitor economy (Table 1).

Table 1: Key labour market indicators for the tourism and travel sector

Labour market indicator	Current position	Implication
Workforce	The tourism workforce continued to grow over the year, with 726,300 tourism filled jobs in the June quarter 2026. This was an increase of 4.1% compared with June 2025, outpacing the 2.6% growth in filled jobs across the whole economy over the same period.[13]	Continued employment growth will require a strong pipeline of appropriately skilled workers to meet workforce demand, support the sector's growth and minimise the risk of workforce shortages.
Future employment growth	Employment in SaCSA's tourism and travel occupations[14] is projected to grow by approximately 9.9% over the decade to May 2035, compared with 13.3% across all occupations.[15] While this projection does not cover all tourism employment, applying the same rate of growth to tourism filled jobs would equate to approximately 69,000 additional jobs by 2035.[16]	The sector will need to attract, develop and retain a significant number of workers, while competing for labour in a growing national market.
Economic contribution	Tourism's direct economic contribution increased by 3.8% in 2024–25 to $81.1 billion, equivalent to 2.9% of the Australian economy.[17] Growth occurred across all states and territories except Western Australia.	Continued growth in tourism activity is likely to support workforce demand, reinforcing the importance of access to the skills and workers needed to sustain growth.
Labour demand	Recruitment activity has eased from its post-pandemic peak; average internet job vacancies declined by 2.6% in the year to June 2026.[18] However, Tourism Research Australia forecasts international visitor arrivals to reach 10.9 million annually by 2030, 24% above 2025 levels.[19]	Although current recruitment pressure has moderated, forecast visitor growth is likely to sustain demand for skilled workers.
Visitor economy	Annual traveller spend reached $198 billion in the year to March 2026, up 10% on the previous 12 months,[20] and is forecast to reach $233 billion by 2030.[21] Tourism Australia's Tourism 2035 strategy also sets longer-term growth targets for international tourism.[22]	Growth in visitor volumes and expenditure is expected to increase activity across the visitor economy and associated demand for workers and skills.
Outbound travel	Australian outbound travel continues to grow, with 12.8 million short-term resident returns in the year to August 2026, up 3.2% on the previous year and 13.7% above pre-pandemic levels.[23] Expenditure on overseas personal travel (excluding education-related travel) also increased by 7.4% to $68.5 billion in 2025, making it Australia's largest import category.[24]	Continued growth in outbound travel volumes and expenditure is likely to support demand for travel services and skilled workers, particularly travel consultants, travel agency managers and other occupations supporting international travel.
Policy settings	Changes to migration and visa settings, including higher visa costs and tighter working holiday maker settings, may affect the supply of migrant workers and visitors supporting tourism and travel. From January 2027, businesses with 200 or more employees will lose access to key employer traineeship incentives, except for group training organisations.[25] This may weaken traineeship pathways in the travel industry. See Policy and regulatory landscape for further detail.	These changes may constrain access to skilled workers and reduce investment in traineeships, affecting workforce development across businesses of all sizes. This reinforces the importance of strengthening domestic training pathways, supporting employers to recruit and train workers, and maintaining effective migration pathways, particularly in regional areas.

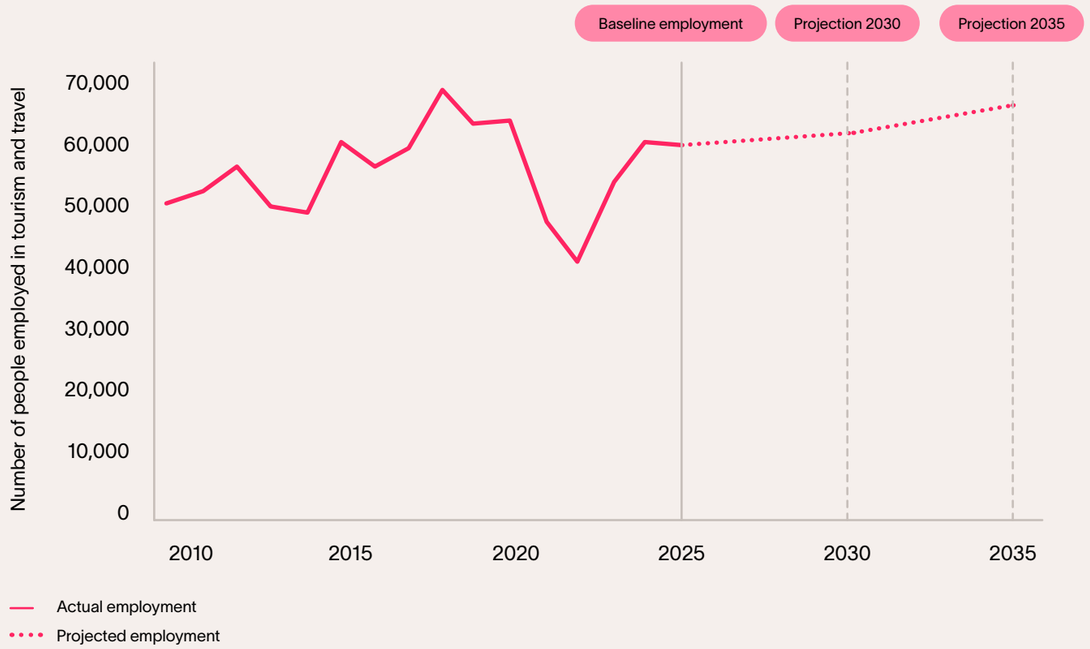


Current employment and outlook

Tourism workforce has continued to grow, with more than 726,000 direct tourism filled jobs in June 2026, 4.1% higher than a year earlier.[26, 27, 28] Across SaCSA's tourism occupations, Jobs and Skills Australia (JSA) projects employment growth of 9.9% over the decade to 2035[29] (Figure 1). Growth is expected to be strongest for conference and event organisers (12.2%), followed by gallery, museum and tour guides and tourism and travel advisers (both 9.3%).

Meeting this growth will require new entrants as well as continued investment in the existing workforce. Stronger entry pathways, training and ongoing skills development will be important to ensuring workforce supply and capability keep pace with demand.

Figure 1: Employment in tourism and travel occupations by 4-digit ANZSCO[30] classifications, May 2010 to 2035



Source: ABS, Labour Force Survey, 4-quarter averages (May 2010 – May 2026), 2026; JSA, Employment Projections (2025 to 2035), 2025.

Note: JSA's employment projections reflect historical and current demographic, macroeconomic and labour market trends. They do not explicitly account for the potential workforce impacts of future policies, strategies, initiatives or major events, including state and territory visitor economy strategies.

13 ABS, *Quarterly Tourism Labour Statistics*, June 2026.
14 SaCSA's tourism and travel occupations span travel agency managers, event managers, tour guides, tourist information officers and travel consultants.
15 JSA, *Employment Projections (May 2025 to May 2035)*, 2025.
16 Caveat: the calculation of approximately 69,000 additional jobs by 2035 is explicitly conditional on applying the projected 9.9% occupational growth rate to tourism filled jobs.
17 TRA, *State and Regional Tourism Satellite Account*, 2025.
18 JSA, *Internet Vacancy Index, ANZSCO 4-digit occupations*, 2026.
19 TRA, *Tourism Forecasts for Australia*, 2025.
20 TRA, *Australian Tourism Data Dashboard*, 2026.
21 TRA, *Tourism Forecasts for Australia*, 2025.
22 Tourism Australia, *Tourism 2035*, 2025.
23 ABS, *Overseas Arrivals and Departures, Australia*, August 2026.
24 Department of Foreign Affairs and Trade, *Australia's Top Goods and Services Trade 2025*, 2025.
25 DEWR, *Changes to Australian Apprenticeships Incentive System from 1 January 2027 (Factsheet)*, May 2026.
26 Tourism cuts across conventional industry classifications, so this measure captures the tourism-related share of employment across a broad range of industries. Tourism filled jobs include employment in accommodation; cafés, restaurants and takeaway food services; clubs, pubs, taverns and bars; passenger transport and vehicle rental; travel agency and information centre services; cultural services; sports and recreation services; retail trade; and education and training.
27 ABS, *Quarterly Tourism Labour Statistics* (Tourism filled jobs, Table 1.1), June 2026.
28 'Filled jobs' is a measure based on the number of jobs held by people employed in main jobs as well as secondary jobs.
29 JSA, *Employment Projections (May 2025 to May 2035)*, 2025.
30 Australian and New Zealand Standard Classification of Occupations (ANZSCO).

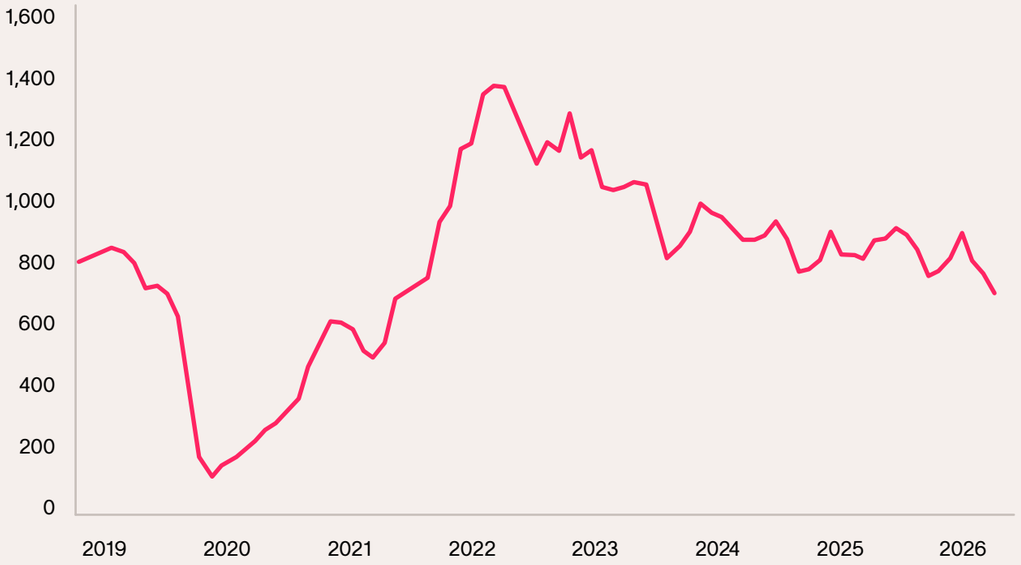
Recruitment conditions and online recruitment activity

Recruitment pressures have eased across the Australian labour market but remain significant. In the year to June 2026, 43% of employers reported difficulty recruiting staff, down from 48% a year earlier and the September 2022 peak of 72%.[31]

Recruitment pressures remain more pronounced outside major cities. In the 4 quarters to June 2026, 41% of employers in major cities reported recruitment difficulty, compared with 45% in inner regional areas and 51% in outer regional and remote areas.[32] This is particularly relevant to tourism given its geographically dispersed workforce.

Vacancies across SaCSA's tourism occupation groups have also declined from their 2022 peak (Figure 2), indicating that post-pandemic recruitment pressures have moderated.[33]

Figure 2: Internet vacancy index, SaCSA tourism and travel occupations, June 2019 to June 2026



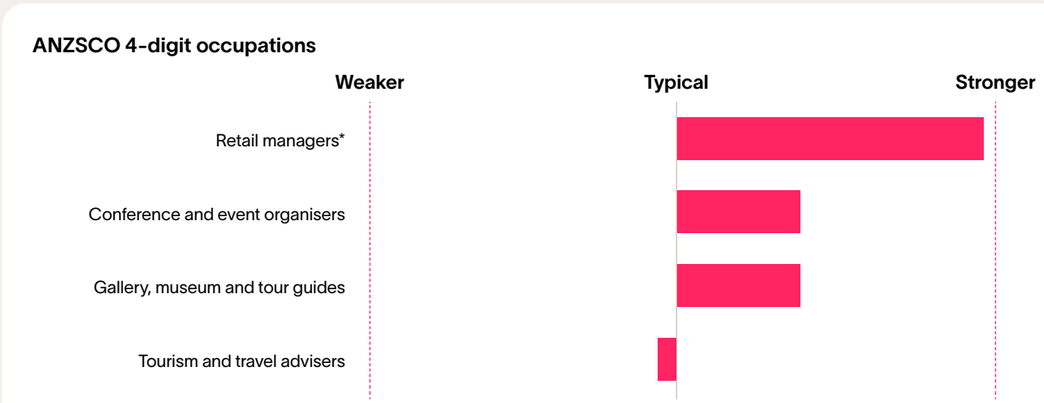
Source: JSA (2026), Internet Vacancy Index, ANZSCO 4-digit occupations.

Note: Relevant 4-digit occupations are weighted by the proportion accounted for by occupations within SaCSA's tourism and travel scope at the 6-digit level, based on the 2021 Census.

However, lower vacancy levels do not necessarily indicate weak demand. Recruitment activity for conference and event organisers, gallery, museum and tour guides, and retail managers (which includes the ANZSCO 6-digit occupation of travel agency manager) remained above 2015–2019 averages over the 12 months to February 2026 (Figure 3).[34]

More recent Lightcast data reinforces this picture of continued demand for key occupations. Over the 12 months to July 2026, job postings increased by 37.6% for travel consultants (up by around 1,600 postings), 18.3% for tour guides (2,930), and 6.3% for conference and event organisers (3,900).

Figure 3: Online recruitment activity index, tourism and travel occupations, Australia, 12 months to February 2026



Source: JSA (2026), Internet Vacancy Index, ANZSCO 4-digit occupations; ABS (2026), Labour Force, Australia, Detailed, Table EQ08.

*Internet Vacancy Index data is available at the ANZSCO 4-digit level. Travel agency managers (142116) belong to the broader retail managers occupation group (1421). Recruitment activity for retail managers is therefore contextual and should not be interpreted as a direct measure of demand for travel agency managers.

What the data means

Recruitment pressures have eased substantially from post-pandemic peaks but remain relatively tight in key occupations and locations. Regional and remote employers continue to face greater recruitment difficulty, while recent growth in job postings for travel consultants, tour guides, and conference and event organisers indicates continued demand despite the broader moderation in vacancies.

31 JSA, *Recruitment Experience and Outlook Survey (REOS)*, June Quarter 2026.

32 JSA, *Recruitment Experience and Outlook Survey (REOS)*, June Quarter 2026.

33 JSA, *Internet Vacancy Index*, June 2026.

34 SaCSA created an online recruitment activity index as a standardised measure of relative labour demand based on the ratio of online job advertisements to employment at the occupational level. Scores for the 12 months to February 2026 are benchmarked against non-overlapping annual ratios for 2017–2019 (pre-COVID period). The index measures online recruitment activity relative to employment. It does not measure total labour demand or whether an occupation is in shortage.

Occupational shortages

Recruitment pressures remain uneven across the sector; shortages persist in several tourism occupations across Australia in 2026 (Table 2).

Table 2: Occupation Shortage List (OSL), tourism and travel occupations, 2025 to 2026

OSCA[35] 6-digit occupation	Occupation title	2025	2026
161933	Travel agency manager	–	–
172231	Event manager	–	–
461632	Tour guide	AUS	AUS
461633	Tourist information officer	–	–
461831	Travel consultant	AUS	AUS

Source: JSA, Occupation Shortage List, 2025 and 2026.

Legend:

AUS indicates that the occupation was assessed as being in shortage nationally

– indicates no shortage

- Tour guides and travel consultants were again identified as occupations in national shortage in 2026, indicating persistent and widespread recruitment challenges. These ongoing shortages highlight the need for targeted workforce attraction and retention strategies, stronger training and career pathways, and continued access to skilled migration where domestic workforce supply is insufficient.
- Event managers were not assessed as being in shortage, although SaCSA stakeholders continue to report difficulty recruiting experienced and knowledgeable workers, particularly in smaller labour markets such as the Northern Territory.

35 Occupation Standard Classification for Australia (OSCA).

36 TRA, *Tourism Forecasts for Australia, Visitor Economy Outlook*, 2025.

37 National Australia Bank (NAB), *Quarterly Business Survey*, Q2 2026. Note: The NAB Quarterly Business Survey reported business confidence of +1 in Q2 2025 and –19 in Q2 2026, while business conditions remained at +2 over the same period. Expectations for business conditions over the following 12 months also weakened, falling from +17 in Q1 2026 to +5 in Q2 2026.

38 ABS, *Business Conditions and Sentiments*, June 2026.

39 Westpac-Melbourne Institute, *Consumer Sentiment*, August 2026.

40 Melbourne Institute, *Survey of Consumer Inflationary and Wage Expectations*, accessed via Trading Economics, 20 August 2026.

41 The Growth Distillery, *Adapting Not Abandoning: Beyond Borders Travel Keynote*, September 2026.

42 ABC News, *"How the war in the Middle East is pushing tourists to Asia"*, 21 June 2026.

43 International Air Transport Association (IATA), *"Willie Walsh's report on the state of the global air transport industry at IATA's 82nd AGM"*, 07 June 2026.

44 Australian Competition and Consumer Commission (ACCC), *Domestic airline competition in Australia: June 2026 report*, 2026.

45 Australasian Leisure Management, *"Regional tourism hit by fuel crisis and flight cuts"*, 16 April 2026.

Challenging economic conditions

While the economic outlook for the visitor economy is positive,[36] near-term operating conditions are more challenging. Weak business confidence, rising cost pressures and subdued household demand may limit businesses' capacity and willingness to expand their workforces, even as travel demand and employment continue to grow.

Business confidence deteriorated sharply in the June 2026 quarter, and business conditions remained subdued. Expectations for business conditions over the year ahead also weakened.[37] In June, 31% of businesses reported declining revenue, 46% reported rising operating costs and 8% had reduced their workforce in response to economic conditions.[38]

Alongside these business pressures, household cost-of-living concerns may influence consumer spending. This is particularly relevant to tourism businesses, which are predominantly small and medium-sized enterprises and are exposed to discretionary spending. Consumer sentiment fell 9.7% over the year to August 2026 and remained below its long-run average,[39] while inflation expectations were 4.9%.[40] However, travel remains a spending priority for many Australians. Research has found that 67% of travellers reduced spending on other lifestyle expenses to afford a holiday.[41] This suggests that consumers may prioritise travel by adjusting spending elsewhere, meaning weaker consumer sentiment does not necessarily translate into reduced travel demand. Nevertheless, economic pressures may influence travel choices and businesses' confidence in hiring and investment.

Global developments are adding to these domestic pressures. Conflict in the Middle East has disrupted international travel patterns, prompting some travellers to change or reroute their travel plans,[42] while higher fuel prices are increasing aviation costs.[43] In Australia, higher fuel costs and changes to air services are also affecting regional connectivity.[44] Australian Regional Tourism reported in April 2026 that bookings in some regions more than two hours from capital cities had fallen by up to 40%, with some destinations reporting very limited forward bookings from May.[45]

Together, weaker business confidence, rising operating costs, regional connectivity challenges and geopolitical uncertainty may constrain tourism businesses' capacity to invest and expand their workforces in the near term, even where travel demand remains resilient and the longer-term outlook is positive.



Tourism and travel VET update 2025[46]

Total VET activity

Tourism and travel-related VET enrolments continued their longer-term decline in 2025

2025 Enrolment profile

74% Female

64% Aged under 25

2025 Enrolments snapshot

49% in TAFE institutes, followed by 40% in private training providers, 10% in schools and 1% in universities.

55% in major cities, 25% in regional areas and 4% in remote or very remote areas, and the remainder offshore or unknown.

26% in Certificate II in Tourism, which was the most enrolled qualification.

The **average 4-year completion rate** for the 2019 and 2020 tourism and travel VET commencing cohorts was 50.6%. This was higher than the 48.3% average across all VET, but lower than the 54.5% average recorded for tourism and travel VET cohorts commencing between 2016 and 2018.

Source: SaCSA Data Dashboard, based on SaCSA analysis of NCVER VOCSTATS data (2026).

46 Includes all tourism-, travel- and events-related qualifications within the SIT – Tourism, Travel and Hospitality Training Package.

Changes in VET activity, 2024 to 2025

Total enrolments

11,630

11,940 in 2024 | **-3%**

Domestic	10,630	**-2%**
International	1,005	**-8%**

91% Domestic

9% International

Total completions

4,295

3,865 in 2024 | **+11%**

Domestic	3,915	**+13%**
International	375	**-3%**

91% Domestic

9% International

Qualifications driving the change (2024 to 2025)

Qualification	Enrolments 2024–2025	Completions 2024–2025
Certificate IV in Travel and Tourism	+140	+120
Certificate II in Tourism	+105	+115
Certificate III in Tourism	-180	+90
Diploma of Travel and Tourism Management	-165	+15

What this means

The decline was largely driven by domestic enrolments

Domestic students accounted for most of the overall decline in tourism and travel–related VET enrolments in 2025, reflecting their much larger share of the student cohort. However, international enrolments fell at a higher rate, declining by 8% compared with 2% for domestic enrolments. At the qualification level, the largest declines were in the Certificate III in Tourism and Diploma of Travel and Tourism Management, partly offset by growth in the Certificate II in Tourism and Certificate IV in Travel and Tourism. The continued decline in domestic enrolments points to a weakening local training pipeline into tourism and travel. If sustained, this could constrain the future supply of workers with relevant vocational qualifications, particularly where workforce demand remains strong.

Traineeships and VET in schools (VETiS)

Traineeship commencements remain well below historical levels

Tourism and travel traineeships, 2025

930

commencements

+12% from 2024; -75% from the peak in 2016

490

completions

+18% from 2024; -80% from the peak in 2019

Where activity was concentrated in 2025

Top qualifications	
Qualification	**Share of tourism and travel commencements**
Certificate III in Travel	58%
Certificate IV in Travel and Tourism	33%

Top occupations	
Occupation	**Share of tourism and travel commencements**
Travel consultant	58%
Tourist information officer	39%

VETiS, 2025

3,505

enrolments

+1% from 2024

1,840

completions

+12% from 2024

2025 VETiS qualification profile

Top VETiS qualifications in Tourism and Travel

Qualification	Share of tourism and travel enrolments	Share of tourism and travel completions
Certificate II in Tourism	70%	76%
Certificate III in Tourism	18%	16%
Certificate III in Events	11%	8%

Together, these qualifications accounted for **nearly all** of tourism and travel–related VETiS enrolments and completions.

School-Based Apprenticeships and Traineeships (SBATs)

30

commencements

+10 from 2024; -82% from the 2011 peak; <30 since 2019

10

completions

<20 per year since 2020

3%

share of total tourism traineeship commencements

2%

share of total tourism traineeship completions

What this means

VETiS activity improved slightly, but traineeship pathways remained well below historical levels

Tourism and travel–related traineeship activity improved in 2025; both commencements and completions increased, although commencements remained well below their 2016 peak. Overall, VET in schools activity also strengthened; however, school-based traineeship commencements and completions remained low, continuing a longer-term decline and suggesting that school-to-industry pathways remain weak and underutilised.

Overall, VETiS activity was highly concentrated in a small number of qualifications. Certificate II and Certificate III in Tourism and Certificate III in Events accounted for almost all tourism and travel–related VETiS enrolments and completions.

Together, this evidence points to limited and declining visibility of tourism qualifications and pathways in schools, potentially reducing young people's exposure to tourism and travel careers and weakening the pipeline from school into further training and employment in the sector.

Source: SaCSA Data Dashboard, based on SaCSA analysis of NCVER VOCSTATS data (2026).



Workforce impacts of technology and artificial intelligence

Artificial intelligence (AI) is a workforce issue that extends across industries and the Jobs and Skills Council (JSC) network. SaCSA is working with Future Skills Organisation (FSO) and other JSCs to contribute industry insights to national work on AI skills and workforce capability. This collaboration recognises that many of the capabilities required to work effectively with AI are transferable across sectors, while its workforce impacts will differ by industry and occupation.

In tourism and travel, these impacts are emerging through changes to how work is performed, and the evidence points more strongly to tasks changing than jobs disappearing. JSA reports that generative AI (GenAI) is more likely to augment workers than replace them, but routine tasks most susceptible to automation and adoption are still at an early and uneven stage.[47]

Technology is already supporting customer service, marketing, bookings, itinerary planning, revenue management and data analysis across tourism and travel.[48, 49] As routine tasks become easier to automate, workers are likely to focus more on complex enquiries, problem-solving, relationship management and personalised service.[50] With demand for workers remaining strong, technology may help ease workforce pressures by improving productivity, rather than substantially reducing the need for workers.

Occupations will be affected differently

The effect of AI, and particularly GenAI will vary between occupations depending on the tasks they perform. JSA's analysis shows particularly high potential for both augmentation and automation among tourism and travel advisers, reflecting the occupation's information-intensive and administrative tasks. Conference and event organisers also have high augmentation exposure, while gallery, museum and tour guides have considerably lower automation exposure (Table 3).

Table 3: GenAI exposure across key tourism and travel occupations[51]

Occupation (4-digit ANZSCO)	Augmentation exposure score	Automation exposure score	Examples of AI application
Tourism and travel advisers	75% **High** *Higher than 94% of assessed occupations*	73% **High** *Higher than 98% of assessed occupations*	AI can assist with or automate information, itinerary, booking and administrative tasks, while complex advice, problem-solving, customer service and consultative selling remain largely human-centred.
Conference and event organisers	73% **High** *Higher than 85% of assessed occupations*	53% **Medium** *Higher than 86% of assessed occupations*	AI can support planning, communications and administration, while coordination, crowd management, crisis management, commercial skills and stakeholder management remain human-centred.
Gallery, museum and tour guides	62% **Medium** *Higher than 41% of assessed occupations*	48% **Low** *Lower than 17% of assessed occupations*	AI can support information and content tasks, while visitor interaction and experience delivery remain strongly human-centred, along with judgement and emotional intelligence.

Source: SaCSA analysis of JSA, Gen AI Capacity Study Bespoke Tables 3 and 4, 2025. Scores of 70% or above are classified as high, 50–69% as medium and below 50% as low. Exposure measures the potential for tasks to be augmented or automated and does not represent the proportion of jobs expected to disappear. 'Higher/lower than x% of occupations' indicates how an occupation's GenAI exposure score compares with other occupations assessed by JSA.

High exposure therefore does not necessarily imply job displacement. Tourism and travel advisers, for example, remain in shortage despite having among the highest GenAI exposure scores of the tourism and travel occupations assessed.[52]

47 JSA, *Our Gen AI Transition: Implications for Work and Skills*, 2025.
48 Organisation for Economic Co-operation and Development (OECD), *Artificial Intelligence and Tourism: G7/OECD Policy Paper*, 2024.
49 OECD, *Tourism Trends and Policies*, 2026.
50 OECD, *Preparing the Tourism Workforce for the Digital Future, 2021; OECD, Tourism Trends and Policies*, 2024.
51 JSA, *Our Gen AI Transition: Implications for Work and Skills*, 2025.
52 JSA, *Employment Projections (2025-2035)*, 2025.

Human skills are becoming more valuable

As routine tasks become easier to automate, communication, empathy, cultural competence, creativity and judgement are likely to become more valuable.[53, 54] Workers will increasingly need to combine these capabilities with technological literacy. Globally, employers expect AI and big-data skills to be among the fastest-growing skills to 2030, alongside analytical thinking, resilience, leadership, creativity and interpersonal capabilities.[55]

This is already reflected in employer demand. Lightcast data for tourism and travel occupations within SaCSA's scope shows strong demand for communication, customer service, sales, management, planning and attention to detail, while relationship management and consultation are among the skills projected to grow most strongly over the next 2 years.[56]

Technology complements rather than replaces human service in the sector. For example, SaCSA's stakeholders in tour guiding have identified AI-enabled translation and digital tour technologies as tools that could extend access where multilingual tour guides are unavailable, easing some workforce pressures, while allowing guides to focus on interpretation, storytelling and visitor engagement.

Human involvement remains critical in certain areas. For example, in First Nations tourism, cultural knowledge may be governed by protocols about who has authority to share it and in what context.

Technology should therefore support, rather than replace, culturally authorised interpretation, with Traditional Custodian authority central to how cultural knowledge is represented and shared.[57]

Technology can also improve accessible tourism through travel planning, information, navigation and communication support.[58] Emerging evidence also shows how human-centred AI can support neurodivergent travellers, including by reducing information overload and decision fatigue during trip planning.[59] However, SaCSA's employer stakeholders emphasised that effective service still requires understanding individual accessibility needs, appropriate language and communication, and responsiveness to customer expectations. Stakeholders also identified a need to better understand how people with disability and neurodivergent people can be trained, supported and included in tourism and travel employment.

Implications for skills and training

The emerging skills challenge extends beyond teaching workers how to use AI and technology. Tourism and travel workers will need to work effectively with technology, critically assess its outputs and perform the tasks technology cannot. This will require digital and AI literacy and data capability alongside occupational expertise, communication, judgement, adaptability and customer service.[60, 61] JSA's analysis of VET pathways reinforces this trend, finding that tourism and travel related–qualifications are, on average, more exposed to augmentation by GenAI than automation (See Appendix B2).[62] Training will therefore increasingly need to integrate technology into occupational learning, rather than prepare workers for a separate category of 'AI jobs'.

Automation may also affect how workers develop occupational expertise. Routine tasks often provide entry-level workers with opportunities to build foundational knowledge, judgement and problem-solving skills through practice.[63] If activities such as basic itinerary building, booking administration and routine customer enquiries are increasingly automated, employers and training providers may need alternative ways to develop these capabilities in new workers.

Training will therefore need to balance technology adoption with opportunities to practise core occupational skills. Shorter, flexible training can support existing workers to upskill as technologies evolve, while trainers and assessors will need current knowledge of both industry practice and emerging technologies.[64]

Ensuring smaller and regional businesses are not left behind

Access to technology will also vary across the sector. Around 94% of tourism-related businesses are non-employing, micro or small businesses with fewer than 20 employees.[65] While smaller businesses can be more agile in adopting accessible, low-cost technologies, limited financial resources and access to specialist expertise can constrain more complex technology adoption.[66] Industry consultation indicates that many businesses recognise the importance of digital technologies but can face challenges identifying suitable platforms and meeting adoption costs. Regional businesses may face additional barriers, with digital inclusion lower outside capital cities[67] and AI adoption lower among regional organisations than metropolitan organisations.[68]

This creates a risk that better-resourced businesses realise productivity gains sooner, while smaller and regional operators fall behind. Accessible advice and practical assistance will be important for supporting more equitable adoption.[69, 70] This aligns with the Australian Government's national tourism strategy, which prioritises support for tourism businesses to modernise, build resilience and remain competitive, alongside strengthening digital capability, adopting emerging technologies and modernising tourism data and insights.[71]

Overall outlook

In tourism and travel, continued demand growth and the importance of customer-facing work should support employment even as roles become more technology-enabled.[72] The priority will be ensuring workers and businesses have the digital, AI and complementary human capabilities needed to respond to changing job roles, skill requirements and ways of working.[73]

SaCSA is undertaking research into how AI, automation and robotics are reshaping jobs, skills and workforce pathways across the service and creative sectors. The findings are expected to be released in late 2026.

53 OECD, *Preparing the Tourism Workforce for the Digital Future*, 2021.
54 World Economic Forum, *Future of Jobs Report 2025*, 2025.
55 World Economic Forum, *Future of Jobs Report 2025 (Skills on the Rise)*, 2025.
56 Lightcast, *Job Postings Analytics*, July 2026.
57 National Library of Australia, *Artificial Intelligence Framework*, 2025; National Library of Australia, *Indigenous Cultural and Intellectual Property: Creative Workplaces, Respectful use and sharing of ICIP*.
58 Theofanous, G., Thrassou, A. & Melanthiou, Y., *The role of technology in facilitating accessible tourism: a systematic literature review of service access for people with disabilities, Asia-Pacific Journal of Business Administration*, 2026.
59 Mauro, N., Ferrero, F., Ardissono, L. & Cena, F., *Human-centered AI for inclusive tourism: enhancing travel planning for adults with autism spectrum disorder, International Journal of Human-Computer Studies*, Vol. 208, 2026.
60 JSA, *Our Gen AI Transition: Implications for Work and Skills*, 2025.
61 OECD, *Preparing the Tourism Workforce for the Digital Future*, 2021.
62 JSA, *Our Gen AI Transition: Exposures & VET, 2025*; SaCSA analysis of program-level data.
63 OECD, *The Effects of Generative AI on Productivity, Innovation and Entrepreneurship*, 2025.
64 JSA, *Our Gen AI Transition: Implications for Work and Skills*, 2025.
65 TRA, *Tourism Businesses in Australia*, 2025.
66 Department of Industry, Science and Resources, *Australia's artificial intelligence ecosystem: growth and opportunities*, 2025.
67 Australian Digital Inclusion Index, 2025 Findings.
68 Australian Government, *National AI Plan: Spread the benefits*, 2025.
69 Australian Government, *National AI Plan*, 2025.
70 Assistant Minister for Productivity, *Competition, Charities and Treasury, Address to 'AI in practice: Turning hype into measurable SME impact'*, 2026.
71 Australian Trade and Investment Commission (Austrade), *THRIVE 2030 Action Plan to 2030*, 2026.
72 OECD, *Tourism Trends and Policies*, 2024.
73 JSA, *Our GEN AI Transition – Skills*, 2025.

Policy and regulatory landscape

Australia's tourism and travel industry is operating within an increasingly complex policy and regulatory environment. Recent developments span workforce regulation, training and apprenticeships, migration, technology, visitor economy growth, worker protections and business regulation. Together, these settings present both opportunities and pressures for tourism and travel businesses.

At the national level, policy continues to support significant growth in the visitor economy. The Australian Government's THRIVE 2030 Action Plan to 2030 retains the ambition of reaching $230 billion in visitor expenditure by 2030, including $95 billion in regional Australia.[74] The action plan also seeks to strengthen career pathways, address occupation shortages, improve labour mobility and use migration to help meet skills needs, while supporting greater adoption of digital technologies and AI.

Similar ambitions are evident across state and territory government visitor economy strategies. New South Wales, for example, is targeting $91 billion in annual visitor expenditure and estimates its visitor economy workforce will need to grow by 50% (from around 300,000 to 450,000 workers) by 2035.[75] Queensland, Tasmania and the Northern Territory are also pursuing strategies focused on increasing visitation, events, connectivity and tourism investment.[76, 77, 78, 79] Delivering this growth will require a larger and appropriately skilled workforce, including in regional areas where workforce shortages already exist.

Understanding the scale of this future workforce requirement is therefore increasingly important. SaCSA's Visitor Economy Workforce Projections Project will translate national, state and territory government tourism targets into estimates of future workforce demand, including requirements associated with seasonal peaks and major events. This will provide a nationally consistent evidence base to support workforce planning and help align skills, training and labour supply with future visitor economy growth.

Migration settings continue to influence workforce availability across tourism and travel, particularly in businesses and regions that rely on temporary migrant workers. Industry stakeholders have identified visa costs, processing times and changes to Working Holiday Maker (WHM) arrangements as factors that may influence the availability of temporary and migrant workers.

Recently announced changes to visa arrangements[80] and associated costs may influence labour supply, reinforcing the importance of understanding the sector's reliance on different workforce sources and strengthening domestic training and employment pathways.

The WHM program remains an important source of labour for tourism and travel particularly in regional areas and businesses experiencing seasonal workforce demand. Tourism and travel work remains exempt from the usual six-month limit on working for the same employer, providing flexibility for businesses to retain WHMs for longer periods.[81] Recently announced changes to WHM visa arrangements,[82] including the expanded use of ballots, may influence the availability and distribution of this workforce.

Taken together, these changes reinforce the need to strengthen domestic workforce and training pipelines, while recognising that these pipelines take time to develop. Migration and international education settings will remain an important consideration in workforce planning as the sector strengthens its domestic pipeline.

Changes to apprenticeship and traineeship policy are also influencing workforce development pathways across tourism and travel. Minimum rates for trainees covered by the National Training Wage have increased,[83] potentially making traineeships more financially attractive to prospective workers, while influencing employment costs for businesses. Changes to the Australian Apprenticeships Incentive System have also adjusted the financial support available to eligible employers and trainees. Tour guides and travel consultants remain eligible for support,[84] however, from January 2026, the maximum training support payment for eligible trainees and the maximum hiring incentive for employers were both reduced from $5,000 to $2,500.[85]

Further changes from January 2027 will target Priority Hiring Employer Incentives for businesses with 200 or more employees, except for group training organisations. Existing eligible arrangements commencing before this date will retain their current incentive rates.[86] For the travel industry, this may affect larger employers' decisions to invest in structured traineeship programs.

Businesses with fewer than 200 employees may continue to receive employer incentives, subject to eligibility requirements, including whether relevant occupations remain on the Australian Apprenticeships Priority List.[87] Stakeholder feedback highlights the role larger travel businesses play in providing structured traineeship opportunities and developing skilled workers who subsequently move into smaller businesses. This reinforces the importance of understanding how training pathways operate across businesses of different sizes and contribute to workforce development across the sector.

For tourism and travel, where traineeship activity remains well below historical levels, understanding the factors influencing employer participation and trainee commencements will be important to strengthening training pathways and supporting future workforce supply. This includes considering how financial incentives, employment conditions and employer capacity interact to influence training decisions and support a sustainable pipeline of skilled workers.

Developments in AI policy are also shaping future skills and capability requirements. The Australian Government's National AI Plan focuses on supporting AI adoption, building worker capability and ensuring that emerging technologies are used safely and responsibly.[88] For tourism and travel businesses, this reinforces the need to build digital and AI capability as technology reshapes tasks across areas such as customer service, bookings and reservations, itinerary planning, marketing and business administration.

Rather than reducing the importance of workforce development, increasing technology adoption is likely to strengthen the need for ongoing upskilling so that workers can use these tools effectively alongside the interpersonal, problem-solving and service skills that remain central to the tourism and travel sector.

SaCSA is collaborating with other Jobs and Skills Councils to provide industry-specific insights into the Future Skills Organisation's work supporting the Australian Government's National AI Plan. This collaboration will help identify emerging AI skills needs, workforce impacts and training priorities across the tourism and travel sector, ensuring that industry perspectives inform national approaches to AI capability development.

The policy and regulatory landscape presents both opportunities and challenges for the tourism and travel sector and its workforce. Government strategies are supporting visitor economy growth and creating workforce opportunities for the sector. At the same time, businesses are navigating impacts to labour and training costs, changing migration and persistent skills shortages.

Ensuring that workforce supply, training pathways and skills development keep pace with visitor economy growth will be critical to supporting a productive, resilient and sustainable tourism and travel sector.

74 Austrade, *THRIVE 2030 Action Plan to 2030*, 2026.
75 New South Wales Government, *NSW Visitor Economy Strategy 2035*, 2025.
76 Queensland Government, *Destination 2045: Delivering Queensland's Tourism Future*, 2026.
77 Tasmanian Government, *Tasmanian Access Strategy 2040*, 2026.
78 Stadiums Tasmania, *Tasmania's Major Venue Content Strategy 2025–2030*, 2025.
79 Northern Territory Government, *Visitor Economy Strategy 2032*, 2026.
80 Department of Home Affairs, *Australian Government Migration Policy Changes*, September 2026.
81 Department of Home Affairs, *Working Holiday Maker program (Exemptions to condition 8547)*, 2026.
82 Department of Home Affairs, *Working Holiday Maker program (Latest News)*, 2026.
83 Fair Work Ombudsman, *2024–2025 Annual Wage Review*, 2025.
84 DEWR, *Australian Apprenticeships Priority List from 1 January 2026*, 2025.
85 Australian Apprenticeships, *Changes to the Australian Apprenticeships Incentive System from 1 January 2026*, 2025.
86 DEWR, *Changes to Australian Apprenticeships Incentive System from 1 January 2027 (Factsheet)*, May 2026.
87 DEWR, *Changes to Australian Apprenticeships Incentive System from 1 January 2027 (Factsheet)*, May 2026.
88 Department of Industry, *Science and Resources, National AI Plan*, December 2025.

Current workforce issues and priorities

SaCSA's stakeholder consultations and workforce analysis point to a set of interconnected challenges shaping the tourism and travel workforce. Labour and skills shortages remain prominent and are closely linked to attraction and retention, unclear career pathways, access to training, demographic change, regional workforce constraints and changing skill requirements.

These challenges are occurring within a broader operating environment characterised by rising costs, changing customer expectations, technological change and expectations around sustainability and employee wellbeing. The predominance of small businesses across tourism can make adapting to these changes particularly challenging, given their more limited capacity to invest in technology, training and workforce development.

Workforce supply, attraction and career pathways

Attracting and retaining a sustainable workforce remains a significant challenge for the tourism and travel sector. SaCSA stakeholders across industry, education and peak bodies have identified limited connections between schools and industry, relatively low participation in tourism-related VETiS, and persistent perceptions of tourism as offering temporary or low-skilled work, rather than long-term career opportunities. Career pathways are often poorly understood, while expectations among new entrants may not align with the realities of tourism work, which contributes to early attrition.

The declining visibility of tourism within the school system may further weaken the future workforce pipeline. Fewer schools are offering tourism qualifications and VETiS enrolments and completions have declined over the past decade,[89] reducing opportunities for students to engage with the sector and understand its career pathways. SaCSA's engagement identified limited teacher availability, competing school priorities, limited principal-level support for tourism education, and low awareness of tourism career pathways as key barriers to delivery and uptake, even where funding for teacher training is available.[90] Research through SaCSA's Structured Approach to Industry and School Programs project will provide further evidence on how career perceptions and school-based exposure influence interest in tourism careers, and identify opportunities to strengthen entry pathways into the sector.

Similar challenges are evident in the events sector, where stakeholders have identified gaps in pathways from school and training into employment. Pathways are often non-linear and discovered by chance, reflecting the following breakdowns across the workforce pipeline: limited visibility of events careers in schools, unclear connections between qualifications and employment, and employers often valuing transferable skills and experience over formal qualifications. Practical experience is also a recurring gap; stakeholders highlight weak industry connections for some events students and limited access to structured work experience and placements.

These pipeline challenges have been compounded by the loss of experienced workers during the COVID-19 pandemic. Industry stakeholders report that, in some businesses, reduced workforce depth has accelerated the progression of less experienced staff into supervisory and management roles before they have fully developed the capabilities required for these positions. SaCSA's consultation suggests this can contribute to challenges with staff retention, workplace culture and team performance, particularly where emerging managers are also responsible for supporting and developing newer workers. This reinforces the importance of developing emerging managers and leaders alongside efforts to attract new entrants.

Demographic change is also reshaping workforce needs and opportunities. Tourism and travel advisers, for example, have experienced a marked ageing of their workforce. Between 2016 and 2021, the proportion aged 15 to 34 years fell from 44% to 26%, while the proportion aged 35 years and over increased from 56% to 74%.[91]

These trends highlight the importance of attracting people at different life and career stages. This includes new entrants beginning their careers as well as career changers who bring transferable skills, life experience and broader workplace capabilities. Diverse entry pathways can help broaden the workforce pipeline, while supporting succession planning and the transfer of industry knowledge and experience.[92]

An ageing population also presents opportunities to broaden the workforce pipeline. Tour guiding already attracts mature-aged workers[93] and people entering tourism later in their careers, who bring occupational knowledge, transferable skills and broader workplace experience. More flexible employment arrangements and accessible training pathways could support greater participation by mature-aged workers, career changers and workforce re-entrants, while diversifying the sector's sources of labour.

89 NCVER VOCSTATS, *VET in Schools*, 2026.
90 SaCSA consultation with the NSW Department of Education, May 2026.
91 ABS, *Census of Population and Housing*, 2016 and 2021.
92 JSA, *Connecting for Impact: Jobs and Skills Report*, 2025.
93 ABS, *Census of Population and Housing*, 2021.



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SaCSA's projects and activities

The following SaCSA projects and activities are designed to investigate and respond to key workforce and skills issues identified in this Workforce Plan:

- Early Career Mobility Analysis and Dashboard
- Drivers of Tour Guide Shortages Project
- Scoping Service Sector Futures – Career Journey Mapping
- Service Skills Portability Pathways (Australian Qualifications Framework (AQF) Level 2)
- Structured Industry Approach to School Programs
- Travel Consultants Career Perceptions Project
- Visitor Economy Workforce Projections Project.

Strategic opportunities for the tourism and travel sector

The following strategic opportunities highlight areas where further consideration or action could help address the workforce and skills issues identified in this Workforce Plan:

- Explore opportunities to strengthen the visibility and connectivity of career pathways, including school-to-industry connections, practical experience, career awareness and clearer pathways through education, training and employment, including in the events sector.
- Consider opportunities to broaden workforce participation and support retention, including for young people, mature-aged workers, career changers and workforce re-entrants, and to better understand the factors influencing workers to enter, remain in and progress through the sector.
- Explore opportunities to strengthen leadership capability and workforce succession, including the development and transfer of skills and knowledge across the workforce.
- Continue to strengthen the workforce evidence base to better understand workforce movements, career progression, retention and emerging workforce pressures.



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Skills, training and changing capability requirements

Employers continue to report difficulty finding workers with the right combination of technical, employability and commercial skills, particularly for entry-level roles. While attracting new entrants remains important, workforce availability does not necessarily translate into workforce readiness. Employers consulted by SaCSA identified gaps in practical skills, experience, communication, customer service, problem-solving and critical thinking, alongside concerns about whether existing qualifications are keeping pace with changing industry requirements. These challenges can be particularly pronounced in regional and remote tourism, where employers may have access to a smaller pool of workers with the skills and experience needed to perform effectively in operational roles. This highlights the importance of strengthening practical training and industry-aligned pathways to ensure new entrants are equipped to meet workplace requirements.

Stakeholders also highlighted limited events-related content within tourism and travel qualifications, which may restrict opportunities for students to develop relevant skills and progress into events-related roles. Greater integration of events content could strengthen training pathways and support workforce mobility across the interconnected tourism, travel and events industries.

Skills and capability gaps can also become more pronounced as workers progress into supervisory and management roles. The loss of experienced workers during the COVID-19 pandemic, combined with ongoing workforce pressures, has in some cases accelerated progression into these roles before workers have had sufficient opportunities to develop leadership, people management and broader business capabilities. Supporting emerging leaders and strengthening knowledge transfer from experienced workers will therefore remain important to workforce capability.

Industry engagement conducted by SaCSA indicates growing interest in more flexible and targeted training, including skill sets and micro-credentials. Traineeships, however, remain underutilised, especially among SMEs. Employers consulted by SaCSA report that smaller businesses often have limited awareness of traineeship opportunities and may lack the capacity to recruit, supervise and support trainees, while larger businesses are generally better placed to do so.

Technology is also reshaping capability requirements. As AI, automation and other digital systems take on some routine and administrative tasks, digital capability is becoming increasingly important alongside complementary human skills such as communication, judgement, cultural competence and problem-solving.

Businesses have differing capacities to adapt, and SMEs often face greater constraints than larger firms in investing in technology, implementation and workforce development. Further analysis is provided in the Workforce Impacts of Technology and Artificial Intelligence section.

Sustainability is another workforce capability issue as governments, businesses and travellers place greater emphasis on environmental impacts and sustainable tourism. THRIVE 2030 identifies supporting a more sustainable and accessible visitor economy as one of 5 national focus areas. It also prioritises helping tourism businesses modernise, build resilience and remain competitive.[94] The Australian Government's sustainable tourism guidance notes growing consumer demand for sustainable travel choices and provides practical resources to help tourism businesses adopt more sustainable practices.[95]

Together, these priorities reinforce the need for workers who can understand and communicate sustainability practices, respond to changing customer expectations and support businesses to implement more sustainable operations.

Growth and diversification in Australia's international visitor markets may also increase the importance of cultural capability across the tourism workforce. The national visitor economy strategy prioritises growing international visitation and expenditure from established and emerging inbound markets, including Southeast Asia and India.[96] This reinforces the need for businesses and workers to understand and respond to the expectations of visitors from diverse cultural backgrounds, including through culturally appropriate communication and service delivery.

Together, these shifts emphasise the need for training and workforce development to remain responsive to changing industry requirements. This includes ensuring that new entrants develop the technical, employability and commercial skills needed to enter the workforce, while providing existing workers with accessible opportunities to build digital, leadership, cultural and other capabilities as their roles and industry requirements evolve.

SaCSA's projects and activities

The following SaCSA projects and activities are designed to investigate and respond to key workforce and skills issues identified in this Workforce Plan:

- Service Skills Portability Pathways (AQF Level 2)
- Update of Travel and Tourism Qualifications.

Strategic opportunities for the tourism and travel sector

The following strategic opportunities highlight areas where further consideration or action could help address the workforce and skills issues identified in this Workforce Plan:

- Support the implementation, promotion and monitoring of updated qualifications and new skill sets, including helping learners and employers understand new progression pathways and how these products can support upskilling, reskilling and workforce retention.
- Explore opportunities to strengthen leadership and management capability, particularly for workers transitioning into supervisory and management roles.
- Support the development of workers' digital and AI capability, alongside complementary human skills such as communication, judgement, problem-solving and cultural competence.
- Explore opportunities to strengthen the alignment and flexibility of training, including responsiveness to evolving industry needs and the use of skill sets, micro-credentials and other targeted approaches to upskilling and reskilling.
- Consider opportunities to strengthen traineeship pathways by improving awareness and participation, addressing barriers to recruitment and training, and identifying ways to support larger employers to maintain successful traineeship programs following the removal of financial incentives under the Australian Apprenticeships Incentive System.
- Continue to monitor and respond to emerging workforce capability needs, including those associated with technology, sustainability, cultural awareness and customer expectations, particularly as the visitor economy becomes increasingly diverse.

94 Austrade, *THRIVE 2030 Action Plan to 2030*, 2026.
95 Austrade, *Sustainable Tourism*, accessed October 2026.
96 Austrade, *THRIVE 2030 Action Plan to 2030*, 2026.



Participation, inclusion and regional workforce challenges

Broadening workforce participation and strengthening inclusive employment and training pathways will be important to meeting future workforce needs, particularly in regional and remote areas.

Australia's population is increasingly diverse; 32% of Australia's 2025 population was born overseas, up from 28.3% a decade earlier.[97] As Australia's population and visitor markets continue to evolve, cultural capability and inclusive customer service will remain important workforce capabilities for tourism and travel. Creating workplaces and training pathways that are accessible and inclusive can also help reduce barriers to participation and support a broader workforce pipeline.

First Nations tourism remains an important area of opportunity. THRIVE 2030 identifies embedding Australia's First Nations cultural heritage within the visitor economy as a national priority.[98] There are opportunities to strengthen tourism employment pathways for First Nations peoples through appropriate training, workforce development and culturally responsive employment opportunities, while supporting First Nations tourism businesses and experiences.

Industry stakeholder feedback has identified challenges in accessing appropriately qualified trainers and assessors outside established tourism destinations, such as Uluru, particularly for First Nations tourism. This contributes to limited access to training and workforce development opportunities and creates barriers to building sustainable local workforce capability.

More broadly, stakeholders have highlighted opportunities to attract career changers and workers from diverse backgrounds, alongside the need to support workers with diverse needs, strengthen inclusive workplace practices and address generational stereotypes.

The tourism and travel sector is geographically dispersed; approximately 30% of tourism-related businesses are located in regional Australia.[99] Regional and remote tourism destinations therefore rely on access to a sustainable local workforce, as well as workers who are willing and able to relocate.

Potential workers and new entrants in regional and remote areas can face barriers including housing constraints, limited access to suitable education and training, fewer career progression opportunities and competition from industries offering higher wages. These factors can reduce the available workforce and make it more difficult for tourism businesses to attract, develop and retain skilled workers.

These challenges are consistent with findings from SaCSA's previous Workforce Plan, which highlighted persistent difficulties in attracting, retaining and upskilling workers in regional and remote tourism areas, compounded by limited access to training.[100]

Addressing these challenges requires consideration of both the experiences of workers and the needs of employers. Stronger connections between schools, training providers and employers, alongside flexible and locally accessible training and clearer career pathways, may help support workforce participation and retention in regional communities.

97 ABS, *Australia's Population by Country of Birth (June 2025)*, 2026.
98 Austrade, *THRIVE 2030 Action Plan to 2030*, 2026.
99 TRA, *Tourism Businesses*, June 2025.
100 SaCSA, *Progress in Action: Tourism, Travel and Hospitality Workforce Plan Update*, 2025.

SaCSA's projects and activities

The following SaCSA projects and activities are designed to investigate and respond to key workforce and skills issues identified in this Workforce Plan:

- Exploring the Drivers of Tour Guide Shortages
- Scoping Service Sector Futures – Career Journey Mapping
- Service Skills Portability and Pathways (AQF Level 2)
- VET Workforce Project
- Visitor Economy Workforce Projections Project.

Strategic opportunities for the tourism and travel sector

The following strategic opportunities highlight areas where further consideration or action could help address the workforce and skills issues identified in this Workforce Plan:

- Explore opportunities to broaden workforce participation and strengthen regional workforce and training pathways, including for diverse and underrepresented groups and people in regional and remote communities.
- Explore opportunities to strengthen First Nations workforce pathways, including access to appropriate training, workforce development and culturally responsive employment opportunities.
- Explore opportunities to strengthen participation and employment pathways for people with disability and people who are neurodivergent, including through accessible training, inclusive recruitment and employment practices and workplaces that recognise and support diverse needs.



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Workforce retention, wellbeing and resilience

Employment patterns and retention challenges vary across the tourism workforce. Tour guiding has a strong reliance on casual, part-time and seasonal employment, providing businesses with flexibility to respond to fluctuating visitor demand and peak periods. In travel and events, entry-level roles are more commonly full-time. These different employment patterns have implications for how businesses attract, develop and retain workers across the sector.

SaCSA's Early Career Mobility Analysis highlights the extent to which retention varies across key tourism occupations: around 41% of travel agency managers remained in the same occupation after 3 years, compared with 27% of travel consultants and 26% of tour guides.[101] This movement has implications for the retention of skills and experience, particularly in occupations where businesses already face challenges attracting and developing workers.

Broader workforce research provides further evidence of retention pressures relevant to the sector. JSA found that employers in accommodation and food services who experience regular staff replacement commonly identified competition from other job opportunities and the nature of the job as reasons for turnover. Across industries, dissatisfaction with job conditions or salary was also identified as a contributing factor.[102] Broader Australian research indicates that flexible working arrangements can support attraction and retention. Employers identified improved work-life balance, higher employee retention and greater ability to attract candidates among the benefits of flexible work.[103] These findings highlight the importance of employment conditions and workplace practices in supporting workforce attraction and retention.

The tourism and travel workforce also operates in an environment affected by changing economic and external conditions. Rising costs, natural disasters, changing visitor demand and geopolitical uncertainty can affect tourism and travel businesses, employment and workforce requirements.[104] These conditions can impact employment demand and workforce stability, as well as the capacity of businesses to invest in training, technology and workforce development.

Building workforce resilience may therefore include strengthening transferable skills, improving workforce planning and supporting businesses and workers to respond to periods of changing demand.

SaCSA's projects and activities

The following SaCSA projects and activities are designed to investigate and respond to key workforce and skills issues identified in this Workforce Plan:

- Early Career Mobility Analysis and Dashboard
- Exploring the Drivers of Tour Guide Shortages
- Travel Consultants Career Perceptions
- Visitor Economy Workforce Projections Project.

Strategic opportunities for the tourism and travel sector

The following strategic opportunities highlight areas where further consideration or action could help address the workforce and skills issues identified in this Workforce Plan:

- Explore opportunities to strengthen workforce retention and engagement, including supportive workplace culture and leadership, flexible and inclusive employment practices, and opportunities for career progression and development.
- Consider opportunities to strengthen workforce resilience and planning, including responses to seasonal demand and changing operating conditions.
- Continue to strengthen the evidence base on workforce retention and mobility to better understand workforce movements, retention drivers and emerging workforce pressures.

101 SaCSA, *Early Career Mobility Analysis*, using ABS Person Level Integrated Data Asset (PLIDA), based on 2018–19 and 2019–20 new workers in selected occupations tracked over 3 years.

102 JSA, *Employers' experiences with retention issues*, 2025.

103 Australian HR Institute, *Hybrid and Flexible Working Practices in Australian Workplaces in 2025*, 2025.

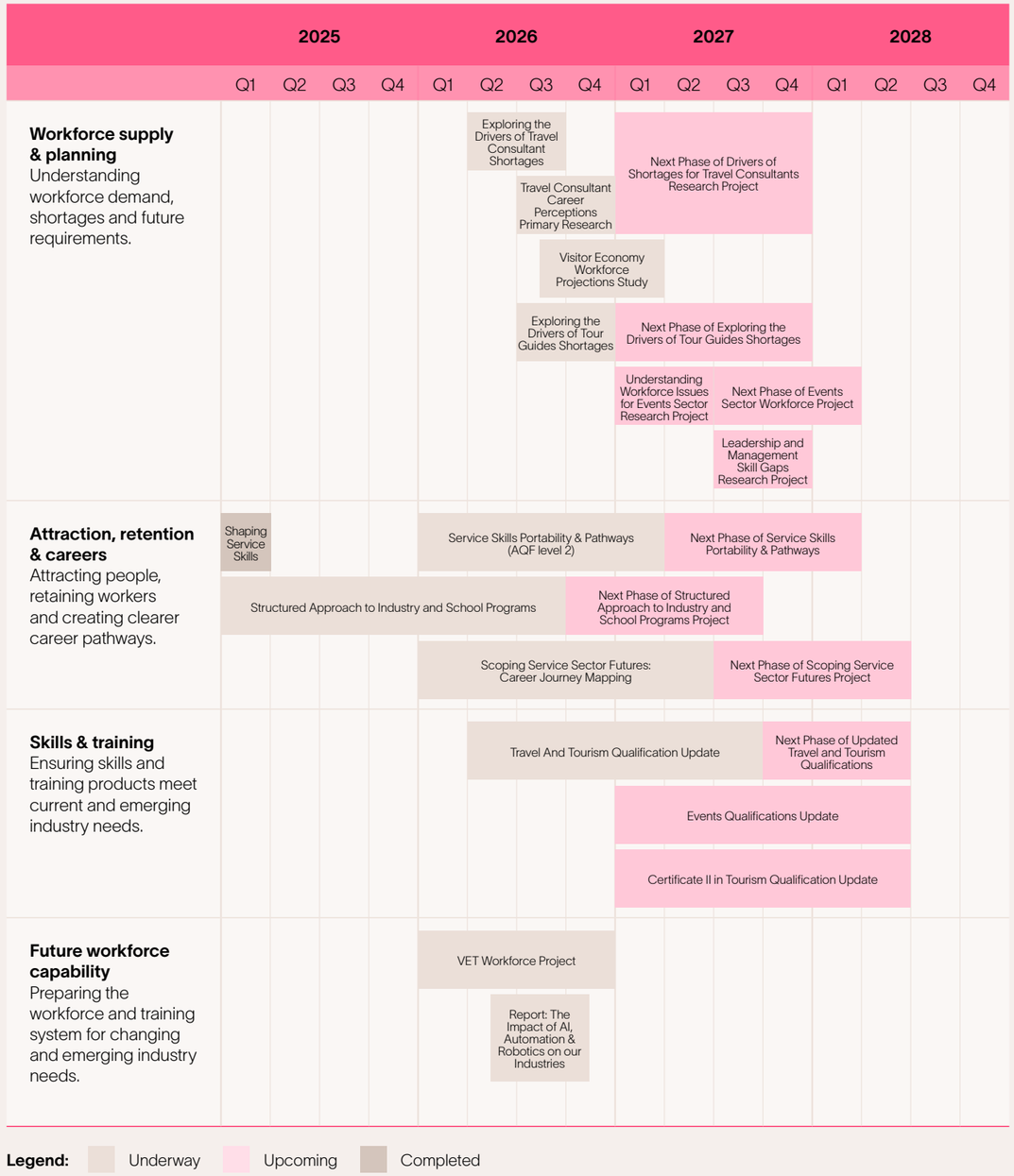
104 Austrade, *THRIVE 2030: The Re-imagined Visitor Economy Strategy*, 2023.

From evidence to action

SaCSA's Travel and Tourism Work Plan sets out how we are responding to the workforce challenges, priorities and opportunities identified through our research, data analysis and industry engagement (Figure 4). It brings together the key projects and activities underway and planned across the life of this Workforce Plan, showing how our work will contribute to addressing current workforce needs while preparing for emerging and longer-term challenges.

The Work Plan is organised around 4 areas of focus: workforce supply and planning; attraction, retention and careers; skills and training; and future workforce capability. Together, these activities demonstrate how the evidence and stakeholder insights presented throughout this Workforce Plan translate into practical action.

Figure 4: Travel and tourism work plan



SaCSA's projects and activities

The projects and activities outlined in this section provide further detail on the work SaCSA is undertaking in response to the workforce priorities and challenges identified in this Workforce Plan. They reflect our ongoing work with industry to build the evidence base, address workforce and skills needs, and support longer-term workforce development.

Projects are grouped as **active**, **planned** or **completed**, and they provide a snapshot of SaCSA's current and recent work and a short overview of the purpose and focus of each project. SaCSA's program of work will continue to evolve as projects progress, new evidence emerges and industry priorities change.

Active

Project title	Project description	Project details
Customer Aggression – Designing Learning Resources to Support Service Industries	SaCSA is designing, developing and implementing a suite of learning resources to provide Registered Training Organisations with source materials for delivering critical knowledge and skills across the service sectors. The resources support the implementation of SaCSA's newly created customer aggression units of competency and skill sets.	Click to view project details
Exploring the Drivers of Tour Guide Shortages	This research examines the factors contributing to persistent tour guide shortages in Australia, including skills and training gaps, employment conditions, workforce retention and perceptions of guiding careers. The findings will inform recommendations to strengthen attraction, training and retention, and support a more sustainable guiding workforce.	Click to view project details
Early Career Mobility Analysis	Using linked ABS data, this project tracks how people move from education and training into employment and progress through their early careers across SaCSA's sectors, including tourism and travel. The findings will address evidence gaps around career pathways, progression and retention, and will underpin SaCSA's Early Career Mobility Dashboard, an interactive dashboard that will be launched in 2026 to support career guidance, workforce planning and training initiatives.	Click to view project details
Report: The Impact of AI, Automation and Robotics on our Industries	This project explores the current and potential future impacts of AI, automation and robotics on SaCSA's industries. It will provide an understanding of the challenges and opportunities posed by technological advancements.	
Scoping Service Sector Futures – Career Journey Mapping	Mapping how workers enter, progress through and leave careers across SaCSA's service sectors, including tourism and travel, will provide a clearer picture of career journeys. The research will identify key transitions, progression and exit points, examine how qualifications support career mobility, and explore barriers and enablers affecting priority cohorts.	Click to view project details
Service Skills Portability and Pathways (AQF Level 2)	This work explores whether common entry-level skills across service industries could be recognised more consistently, reducing duplication and making it easier for learners and workers to move between sectors.	Click to view project details

Project title	Project description	Project details
Structured Approach to Industry and School Programs	Focusing on school-based industry engagement, this research examines how these experiences influence young people's perceptions of and pathways into hospitality and tourism careers. The findings will identify opportunities to strengthen school–industry connections and build a stronger domestic workforce pipeline.	Click to view project details
Travel Consultants Career Perceptions	Building on the Exploring the Drivers of Travel Consultant Shortages research, this next stage will examine how perceptions of travel consultant careers influence workforce attraction, retention and career decisions. Research with key influencers and prospective, current and former workers will identify barriers and opportunities to improve career awareness, attractiveness and retention.	Click to view project details
Update of Travel and Tourism Qualifications	The Certificate III qualifications in tourism, travel and guiding are being reviewed and updated to ensure they reflect current and emerging workforce needs. The review aims to strengthen practical, transferable and future-focused skills and create clearer pathways across travel, tourism and guiding.	Click to view project details
VET Workforce Project	As part of a national program aligned with the Australian Government's VET Workforce Blueprint, this work focuses on understanding and addressing key challenges affecting the VET workforce. Its broader aim is to support a strong, sustainable workforce of VET teachers, trainers and assessors that can meet industry skills and training needs.	Click to view project details
Visitor Economy Workforce Projections Project	This work will estimate the future workforce needed to deliver Australia's tourism growth ambitions. Tourism targets will be translated into workforce demand, accounting for workforce supply, seasonal peaks and major events to produce national, state and occupational employment projections.	

Planned

Project title	Project description
Certificate II in Tourism Qualification Update	This project will review and update the Certificate II in Tourism qualification to ensure it reflects current and emerging workforce needs. The review will aim to strengthen practical, transferable and future-focused skills and support clear and relevant pathways for learners and the workforce.
Events Qualification Update	This project will review events sector–related qualifications to ensure they reflect current and emerging workforce needs. The review will aim to strengthen practical, transferable and future-focused skills, and support clear and relevant pathways for learners and the workforce.
Leadership and Management Skills Gaps	This research will examine leadership and management capability gaps across tourism, travel and hospitality, including pathways into supervisory and management roles, and whether existing training adequately prepares workers for these responsibilities. The findings will identify opportunities to strengthen leadership capability and career progression across the sector.
Understanding Workforce Issues for the Events Sector	This research project will build a clearer understanding of the workforce issues facing Australia's events sector and provide an evidence base to inform future workforce planning and action.

Completed

Project title	Project description
Qualification Reform Project	This project reviewed qualifications in SaCSA's remit to support simpler, more flexible and purpose-led qualification design. It aimed to reduce duplication, improve skill transferability and identify qualifications that may require future reform, including those with low or no enrolments.
Unit Currency Audit	This audit reviewed qualifications across SaCSA's service industries to identify and address superseded or deleted units of competency that remained in current qualifications.

Following analysis and industry consultation, SaCSA identified suitable replacement units and updated affected qualifications to ensure training products remain current and fit for purpose.

Looking ahead in tourism and travel

Australia's visitor economy has a strong long-term growth outlook, but realising that potential will depend on workforce capacity keeping pace with demand. As traveller demand grows, tourism and travel will need more skilled workers, while continuing to manage persistent occupational and skill shortages, declining participation in VET, regional workforce constraints and challenges in attracting and retaining workers.

The scale and timing of future workforce demand reinforce the need for early and sustained planning. Tourism Australia's Tourism 2035 strategy establishes a long-term growth horizon for the visitor economy,[105] while major events will create additional workforce pressures and opportunities.

For example, the Brisbane 2032 Tourism, Hospitality and Events Workforce Roadmap 2026–2035 estimates that Queensland should plan for approximately 75,000 to 140,000 additional tourism, hospitality and events workers, supported by 40,000 to 70,000 volunteers and a separate temporary surge workforce.[106]

The Brisbane 2032 roadmap also highlights the long lead times required to develop workforce capability. Indicative development times range from 3 to 5 years for senior outdoor, adventure and nature-based roles, 5 to 8 years for hotel, accommodation and event managers, and 6 to 10 years for executive and senior chefs and production services managers.[107] These lead times demonstrate why workforce pipelines must be established well before demand peaks, rather than relying on recruitment responses once shortages emerge.

Future workforce planning must therefore be anticipatory rather than reactive. National and state tourism strategies, visitor economy forecasts and major event planning can help identify where and when workforce demand is likely to emerge. Aligning these projections with the time required to attract, train and develop workers will help the sector prepare for growth and reduce the risk of future workforce shortages.

Workforce capability will be equally important. Technology, demographic change, sustainability, accessibility and changing customer expectations will continue to reshape tourism and travel roles. Businesses will increasingly need workers who can use digital and AI-enabled tools, alongside the communication, judgement, cultural capability, leadership and customer service skills that remain central to quality travel experiences.

Government policy settings will also influence the sector's ability to meet future workforce needs. Changes to migration arrangements and employer traineeship incentives may affect access to workers and nvestment in training, reinforcing the importance of strong domestic workforce pipelines alongside effective migration pathways.

These challenges will affect employers and locations differently. While many workforce issues are shared across the sector, they can be more acute in regional and remote areas, where smaller labour markets make it harder to attract and retain workers and access training. Small businesses may also have less capacity to invest in formal training, technology adoption and workforce development. Responses will therefore need to account for differences in business size, location and workforce capacity.

SaCSA's work plan is building the evidence and practical foundations for this next phase of workforce planning. Current and planned projects are examining future visitor economy workforce demand, the drivers of tour guide shortages, perceptions of travel consultant careers, school-to-industry pathways and worker career journeys. SaCSA is also reviewing tourism and travel qualifications and exploring opportunities to improve skills portability, VET workforce capability and qualification design.

Together, this work will strengthen understanding of where workforce supply is most constrained, what influences attraction and retention, how workers move through tourism and travel careers, and how training products and pathways can respond more effectively to changing industry needs.

No single organisation or intervention can address these issues alone. Sustained collaboration between industry, governments, unions, training providers and other stakeholders will be essential to translate evidence into action and keep workforce planning responsive as the visitor economy evolves.

With national visitor economy strategies looking towards 2035 and Brisbane 2032 creating a significant nearer-term workforce milestone, the sector needs to invest in workforce development well ahead of anticipated demand. Strengthening entry and career pathways, developing the capabilities of existing workers and supporting businesses to attract and retain skilled staff will be critical to building a productive, resilient and sustainable tourism and travel workforce.

105 Tourism Australia, *Tourism 2035 Strategy*, 2025.
106 Queensland Tourism Industry Council (QTIC), *Brisbane 2032 Tourism, Hospitality and Events Workforce Roadmap 2026–2035*, 2026.
107 Queensland Tourism Industry Council (QTIC), *Brisbane 2032 Tourism, Hospitality and Events Workforce Roadmap 2026–2035*, 2026.

Part 2: Hospitality Workforce Planning Update 2026

Executive summary

Australia's hospitality workforce is entering a more stable period following the severe labour market pressures experienced after the COVID-19 pandemic. Employment has remained broadly steady, recruitment difficulty has fallen from its post-pandemic peak and overall online vacancy levels have returned closer to pre-pandemic levels.

Nevertheless, workforce pressures persist and remain uneven across the sector. Some employers continue to experience recruitment difficulty, while employment is projected to grow by around 10% over the decade to May 2035, sustaining demand for workers as the sector expands.[108, 109]

Workforce pressures are increasingly concentrated in particular occupations and locations. Cooks, chefs, senior chefs and pastrycooks continue to experience shortages, while regional employers face additional constraints in attracting experienced workers and accessing training and workforce development.[110] Stakeholders also report that housing, transport and other local conditions can make it more difficult to attract and retain workers in regional areas. Migration remains an important source of workforce supply, particularly where domestic supply is insufficient,[111] making changes in migration settings relevant to the sector's future workforce supply.

The training pipeline is also under pressure. Hospitality enrolments declined in 2025, largely due to lower international enrolments, with particularly large falls in key cookery qualifications. Domestic enrolments also declined slightly, while apprenticeship and traineeship commencements fell by 12% to their lowest level since 2006.[112] School-based hospitality VET grew over the same period, but school-based apprenticeship and traineeship (SBAT) commencements fell sharply.[113] Alongside stakeholder feedback about inconsistent school-to-industry connections, limited workplace exposure and unclear transitions into employment and further training, these trends raise concerns about the strength of pathways into employment-based hospitality training.

Hospitality continues to attract large numbers of workers. Around 198,900 people entered accommodation and food services as new entrants to employment in the year to February 2026, the second-highest number of any industry. Yet job mobility was 15.4%, more than twice the national rate, and retention varied considerably across hospitality occupations.[114] SaCSA's analysis also indicates relatively limited progression into some supervisory and management roles, reinforcing the importance of clearer career pathways and opportunities for progression. The challenge is therefore not simply attracting people into hospitality, but creating stronger pathways for them to remain, develop and progress in their careers.

Workforce capability is another pressure point. Four-year completion rates for hospitality-related qualifications have averaged around 48% across the 2016 to 2020 commencing cohorts,[115] while stakeholders continue to identify concerns about job readiness, practical capability and the alignment of training with workplace requirements.[116] Leadership and management capability also remains a concern, because lower retention reduces the pool of experienced workers available to progress, and some workers move rapidly into leadership roles before they are adequately prepared. Stakeholders reported that this can have implications for the quality of supervision and workforce retention. Smaller businesses have also identified a need for more accessible, practical and flexible leadership training, including shorter, targeted options that build specific supervisory and management capabilities.

At the same time, technology is changing how hospitality work is performed. Current evidence points more strongly to AI, automation and digital systems changing tasks and skill requirements than to widespread occupational displacement. Stakeholders continue to emphasise the importance of communication, service and other interpersonal capabilities, alongside technical and practical skills, as technology adoption increases. Training and workforce development will therefore need to support workers to use emerging technologies, while continuing to develop core occupational skills.[117]

These workforce pressures are unfolding in a challenging operating environment. Rising labour and operating costs, weaker business confidence and subdued household demand may constrain hiring, training and workforce investment in the near term, particularly for smaller businesses.[118]

108 ABS, *Labour Force, Australia, Detailed*, February 2026, 4-quarter average; Jobs and Skills Australia (JSA), *Employment Projections*, May 2025 to May 2035.
109 JSA, *Recruitment Experience and Outlook Survey*, June Quarter 2026; JSA, *Internet Vacancy Index*, 2026.
110 JSA, *Occupation Shortage List 2026*, 2026; SaCSA, stakeholder consultations with hospitality industry representatives, 2025–26.
111 ABS, *Jobs in Australia, 2022–23*, November 2025.
112 SaCSA *Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.
113 SaCSA *Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.
114 ABS, *Job mobility, February 2026*, released 31 July 2026; SaCSA, *Early Career Mobility Analysis*, using ABS Person Level Integrated Data Asset.
115 SaCSA *Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.
116 SaCSA, *Early Career Mobility Analysis*, using ABS Person Level Integrated Data Asset (PLIDA); SaCSA, *Tourism, Travel and Hospitality Workforce Plan Update 2025*, Culinary Qualifications Review.
117 DEWR, *AI and employment in Australia: Monitoring framework and evidence to date*, July 2026; JSA, *Our Gen AI Transition: Implications for Work and Skills*, August 2025.
118 NAB, *Quarterly Business Survey*, Q2 2026; ABS, *Business Conditions and Sentiments*, June 2026; RBA, *Financial Stability Review, Chapter 2: Resilience of Australian Households and Businesses, March 2026*; RBA, Box A: *Insights from liaison, Statement on Monetary Policy – May 2026*.



Against this backdrop, SaCSA has identified 3 interconnected workforce priorities for hospitality:

- Labour shortages and workforce supply: strengthen workforce pipelines and respond to persistent shortages, with particular attention to chef and cook shortages and regional workforce challenges.
- Attraction, retention and career pathways: strengthen pathways into hospitality, improve retention and create clearer opportunities for workers to progress and build longer-term careers.
- Training and workforce capability: strengthen training quality, job readiness and leadership capability, while supporting workers and training providers to respond to changing technology and skill requirements.

SaCSA's work is focused on building the evidence and practical responses needed across these priorities. Current and planned activity includes research into chef and cook shortages and development of the National Chef Workforce Action Plan; review and development of hospitality training products; research into career journeys, workforce mobility and school-to-industry pathways; and employment projections to strengthen understanding of future workforce demand. SaCSA will progress this work with industry, governments, unions, training providers and other stakeholders so that responses remain grounded in workforce needs and can adapt as those needs change.

The longer-term challenge is not simply to grow the hospitality workforce, but to build stronger pathways for people to enter, develop and pursue sustainable careers, while ensuring the sector has the skills and capability to adapt as workforce needs change.

Explore workforce data and detailed industry, occupation and qualification insights online

SaCSA's interactive Data Dashboard brings together data from the ABS, NCVER, JSA and industry reports. Explore workforce trends, occupations, qualifications and skills data across SaCSA's sectors to support evidence-based workforce planning and decision-making.

Scan the QR code to explore the SaCSA Data Dashboard.

The forces shaping the hospitality workforce

Economic and labour market conditions

The Australian hospitality workforce has continued to stabilise following the severe workforce shortages experienced after the pandemic. Employment has remained broadly stable and recruitment activity remains relatively strong, although workforce pressures remain uneven across occupations and locations. At the same time, rising labour and operating costs and subdued demand may constrain hiring in the near term. Table 4 provides a snapshot of the key economic and labour market indicators shaping current workforce conditions.

Table 4: Key economic and labour market indicators for the hospitality sector

Labour market indicator	Current position	Implication
Employment	Around 984,300 people were employed in the hospitality sector[119] in February 2026, compared with 985,800 a year earlier, a change of less than 1%.[120]	Employment has stabilised following the significant post-pandemic adjustment.
Future employment growth	Hospitality employment is projected to grow by around 10% between May 2025 and May 2035, reaching nearly 1.09 million workers. This is below projected growth of 13.3% across all industries.[121]	Although slower than projected national employment growth, this increase in employment would sustain demand for additional workers over the decade.
Economic contribution	Gross value added (GVA) for accommodation and food services increased from $64.7 billion in 2023–24 to $67.2 billion in 2024–25, maintaining a 2.6% share of total industry GVA.[122]	The sector continues to make a substantial economic contribution despite challenging operating conditions.
Labour demand	Recruitment activity remained relatively strong.[123] Average vacancies increased by 3% over the year to May 2026, compared with a 1% decline across all industries.[124] In the June quarter 2026, 62% of hospitality employers were recruiting or had recently recruited, compared with 48% nationally.[125]	Demand for workers remains relatively strong, despite broadly stable employment. Increased recruitment activity may reflect a combination of replacement demand, workforce turnover and persistent recruitment difficulty, rather than employment growth alone.
Labour costs	Award wages increased by 4.75% from 1 July 2026.[126] Around 60% of accommodation and food services employees were Award reliant in 2025, compared with 22.7% across all industries.[127] Before the Award increase, wages in accommodation and food services grew by 2.8% over the year to the June quarter 2026, compared with 3.2% across all industries.[128]	High Award reliance means hospitality businesses are disproportionately exposed to increases in minimum and Award wages.
Policy settings	Migration and international education changes may constrain hospitality's supply of migrant workers, WHMs and international students. See Policy and regulatory landscape for further detail.	Workforce pressures may increase, particularly in regional areas, reinforcing the need to strengthen domestic workforce and training pipelines.

119 The hospitality sector workforce is estimated by aggregating employment in the accommodation and food services industry division and the gambling activities industry subdivision, as defined by the Australian and New Zealand Standard Industrial Classification (ANZSIC). The full list of Hospitality occupations in SaCSA's scope is included in Appendix A.

120 ABS, *Labour Force Survey*, February Quarter 2026 (4-quarter average).

121 JSA, *Employment Projections*, May 2025 to May 2035.

122 ABS, *Australian System of National Accounts*, 2024–25, Table 5 (current prices).

123 For this analysis, the hospitality industry comprises accommodation and food services only. Gambling activities are excluded due to data unavailability.

124 ABS, *Job Vacancies*, Australia, May 2026 (4-quarter average).

125 JSA, *Recruitment Experience and Outlook Survey (REOS)*, June Quarter 2026.

126 Fair Work Commission, *Annual Wage Review 2026*, June 2026.

127 Fair Work Commission, *Statistical report – Annual Wage Review 2026*, Version 2, March 2026.

128 ABS, *Wage Price Index, Australia*, June 2026.

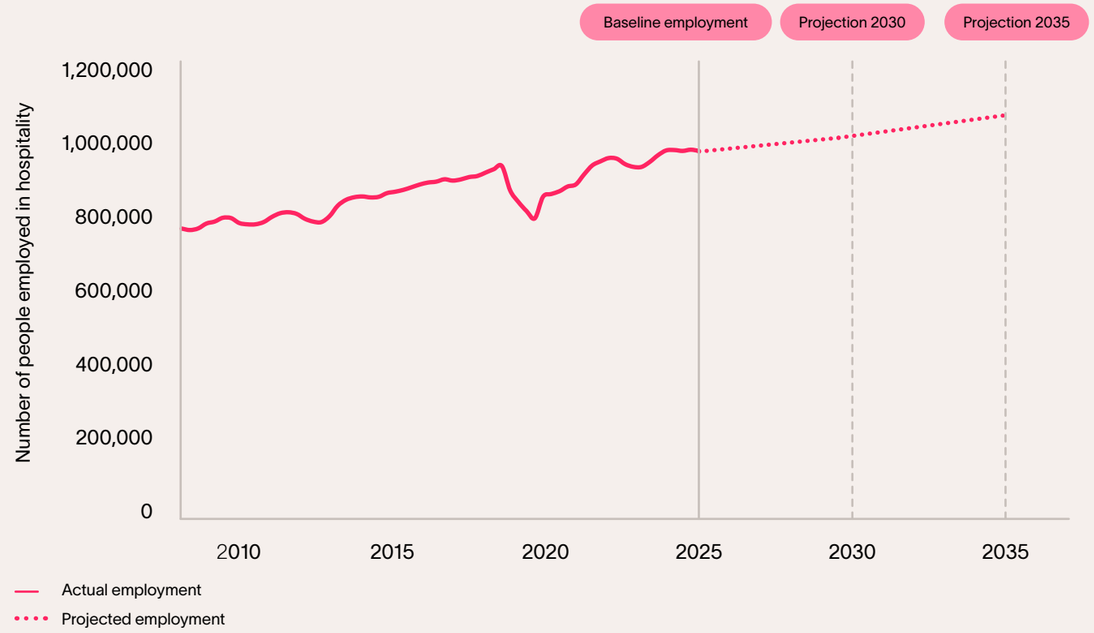


Current employment and outlook

Hospitality employment remained broadly stable over the year to February 2026, at around 984,300 workers compared with 985,800 a year earlier.[129] This suggests the workforce has stabilised following the significant disruption and labour shortages experienced after the pandemic.

Over the longer term, employment is projected to grow by around 10% between May 2025 and May 2035, reaching nearly 1.09 million workers (Figure 5).[130] While this is below the projected 13.3% increase across all industries, it still represents substantial additional workforce demand.

Figure 5: Hospitality sector employment, 2010–2035



Source: ABS, Labour Force Survey, 4-quarter averages (May 2010 – May 2026), 2026; JSA, Employment Projections (2025 to 2035), 2025.

Note: JSA's employment projections reflect historical and current demographic, macroeconomic and labour market trends. They do not explicitly account for the potential workforce impacts of future policies, strategies, initiatives or major events, including state and territory visitor economy strategies.

Source: ABS, Labour Force, Australia, Detailed, February 2026, 4-quarter average; JSA, Employment Projections, May 2025 to May 2035.

Note 1: The hospitality sector workforce is estimated by aggregating employment in the accommodation and food services industry division and the gambling activities industry subdivision, as defined by ANZSIC.

Note 2: JSA's employment projections reflect historical and current demographic, macroeconomic and labour market trends. They do not explicitly account for the potential workforce impacts of future policies, strategies, initiatives or major events, including state and territory visitor economy strategies.

Growth is also projected across several key hospitality occupations, although the scale varies. Over the decade to May 2035, employment is projected to grow by 12.5% for chefs, 11.6% for waiters, 8.8% for kitchenhands and 7.2% for café and restaurant managers.[131] These projections point to ongoing workforce requirements, even in a relatively stable employment environment.

129 ABS, *Labour Force Survey*, February Quarter 2026 (4-quarter average).
130 JSA, *Employment Projections*, May 2025 to May 2035.
131 JSA, *Employment Projections*, May 2025 to May 2035.

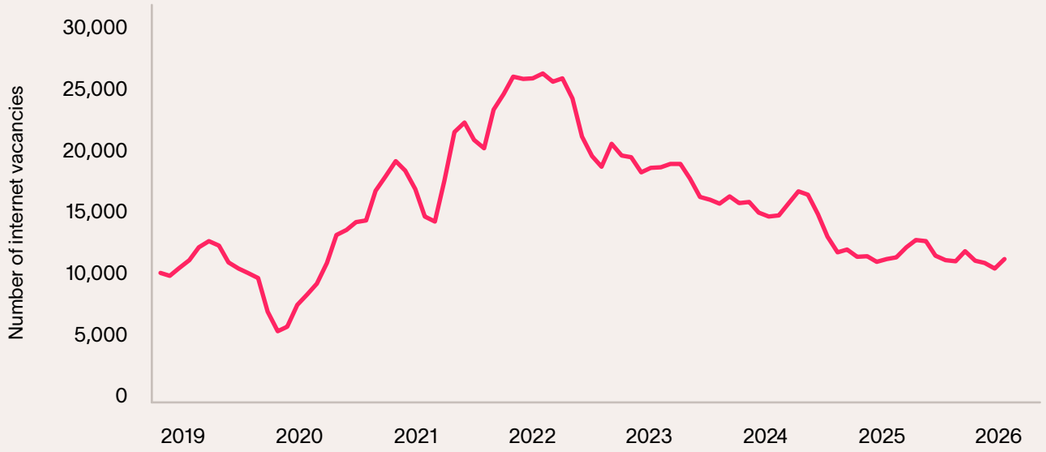
Recruitment conditions and online recruitment activity

Recruitment conditions in the hospitality sector have improved from their post-pandemic peak, although employers continue to report difficulty filling vacancies.[132] The proportion of employers reporting recruitment difficulty fell from 71% in early 2022 to 34% in March 2026. On a 4-quarter average basis, it declined from 31% in the year to June 2025 to 27% in the year to June 2026.[133] This suggests that recruitment pressures have moderated considerably, rather than disappeared.

Recruitment difficulties remain more pronounced outside major cities, indicating that the improvement in recruitment conditions has not been uniform across labour markets. In outer regional, remote and very remote Australia, 52% of employers recruiting in the June quarter 2026 reported difficulty filling vacancies.[134]

This easing in recruitment conditions is also reflected in online vacancy data. Across occupations within SaCSA's hospitality scope, the sharp increase in internet vacancies recorded through 2021 and 2022 has largely unwound. Vacancy levels by June 2026 were broadly in line with those recorded before the pandemic (Figure 6).

Figure 6: Internet vacancies across SaCSA's hospitality occupations, June 2019 to June 2026

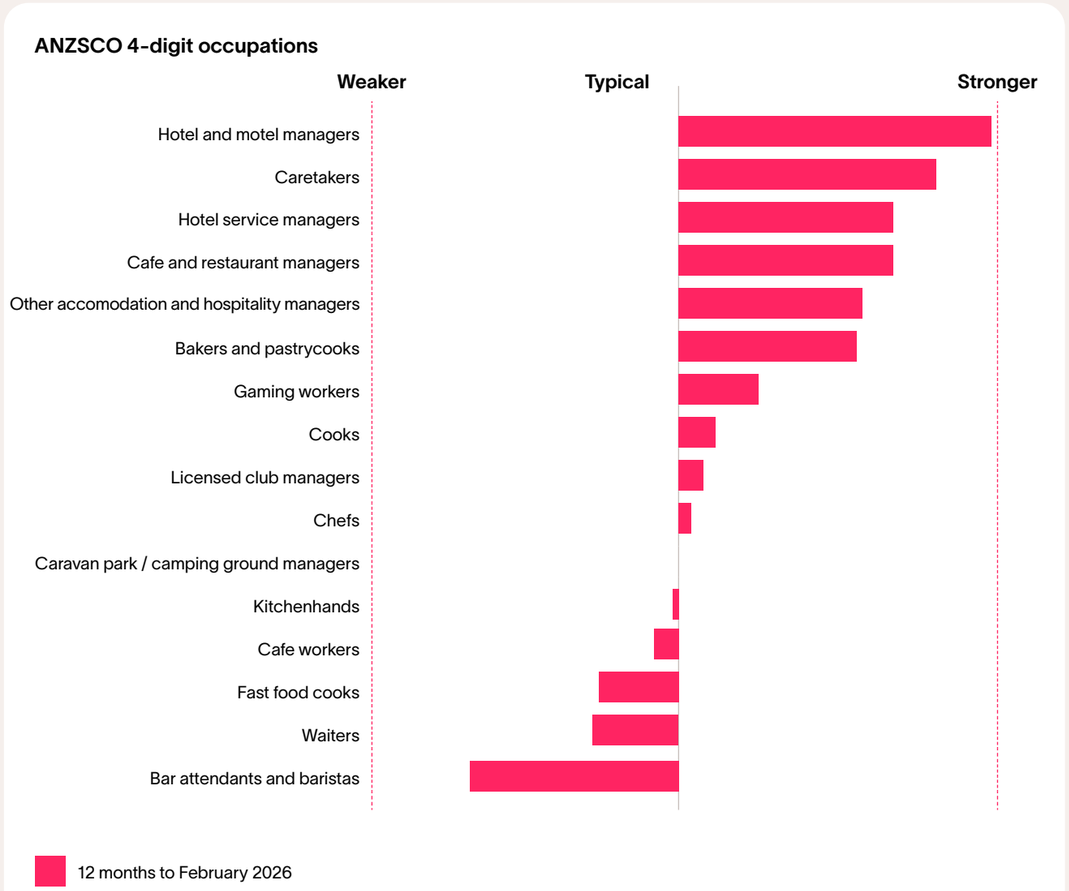


Source: JSA (2026), Internet Vacancy Index, ANZSCO135 4-digit occupations.

Note: Relevant 4-digit occupations are weighted by the proportion accounted for by occupations within SaCSA's hospitality scope at the 6-digit level, based on the 2021 Census.

However, overall vacancy levels mask considerable variation between occupations. Compared with pre-pandemic benchmarks, online recruitment activity remains relatively strong for management and some skilled roles, while demand for several customer-facing and food service occupations is weaker (Figure 7).[136]

Figure 7: Online recruitment activity index, hospitality occupations, Australia, 12 months to February 2026



Source: JSA (2026), Internet Vacancy Index, ANZSCO 4-digit occupations; ABS (2026), Labour Force, Australia, Detailed, Table EQ08.

What the data means

Recruitment conditions have eased considerably from their post-pandemic peak, and overall online vacancy levels have returned broadly to pre-pandemic levels. However, employers continue to experience difficulty filling vacancies, with pressures more pronounced outside major cities and uneven across occupations. Management and some skilled roles continue to show relatively strong recruitment activity, while several customer-facing and food service occupations are below pre-pandemic benchmarks. Overall, remaining recruitment pressures are increasingly concentrated in particular occupations and locations.

132 JSA, *Recruitment Experience and Outlook Survey (REOS)*, June Quarter 2026.
133 JSA, *Recruitment Experience and Outlook Survey (REOS)*, June Quarter 2026.
134 JSA, *Recruitment Experience and Outlook Survey (REOS)*, June Quarter 2026.
135 Australian and New Zealand Standard Classification of Occupations (ANZSCO).
136 SaCSA created an online recruitment activity index as a standardised measure of relative labour demand based on the ratio of online job advertisements to employment at the occupational level. Scores for the 12 months to February 2026 are benchmarked against non-overlapping annual ratios for 2017–2019 (pre-COVID period). The index measures online recruitment activity relative to employment. It does not measure total labour demand or whether an occupation is in shortage.

Occupational shortages

JSA's Occupation Shortage List (OSL) shows continuing workforce pressure in several skilled hospitality occupations, with senior chefs, chefs, cooks and pastrycooks assessed as being in national shortage (Table 5).

Table 5: OSL Shortage Status for hospitality occupations, 2025 to 2026

OSCA[137] 6-digit occupation	Occupation title	2025	2026
161631	Senior chef	R	AUS
321131	Chef	R	AUS
322331	Cook	AUS	AUS
322431	Pastrycook	R	AUS

Source: JSA, Occupation Shortage List, 2025 and 2026.

Note: The table includes hospitality occupations identified as being in shortage in 2025 or 2026. State and territory shortage ratings for 2025 have been excluded, as JSA no longer publishes these ratings from 2026.

Legend:

AUS indicates that the occupation was assessed as being in shortage nationally

R indicates regional shortage only

What changed from 2025 to 2026

- Shortage pressures strengthened across several skilled culinary occupations. Senior chefs, chefs and pastrycooks moved from regional shortage in 2025 to national shortage in 2026.
- Cooks remained in national shortage in 2026, continuing their national shortage classification from 2025.
- For chefs, the move from regional to national shortage is consistent with SaCSA's submission to JSA on the 2026 OSL, which recommended that chefs be reclassified as a national shortage, reflecting persistent recruitment and retention challenges, reliance on skilled migration and concerns about future workforce supply.
- Overall, the 2026 results point to continuing workforce pressures concentrated in key culinary occupations.

137 Occupation Standard Classification for Australia (OSCA).

Near-term economic conditions remain challenging

Despite the positive longer-term employment outlook, hospitality businesses continue to face weak confidence, rising costs and subdued household demand.

Business confidence deteriorated sharply in the June quarter 2026, while expectations for business conditions over the year ahead also weakened.[138] In accommodation and food services, 48% of businesses expected operating expenses to increase over the following 4 weeks, while 30% expected revenue to decline, and 57% expected it to remain unchanged.[139] Almost half expected difficulty meeting their financial commitments over the same period, while 28% had reduced their workforce in response to fuel prices or availability.[140]

These pressures are particularly relevant in a sector dominated by small operators; more than 90% of accommodation and food services businesses classified as small businesses.[141] Reserve Bank of Australia (RBA) analysis indicates that financial stress is expected to remain higher among smaller businesses, particularly in hospitality.[142]

Household conditions present a further challenge. Consumer sentiment fell 9.7% over the year to August 2026 and remained below its long-run average,[143] while consumer inflation expectations remained elevated at 4.9%.[144] RBA discussions with businesses and industry bodies indicated that some tourism and hospitality businesses exposed to discretionary spending have experienced a pullback in customer spending.[145] Together, these conditions may lead hospitality businesses to take a more cautious approach to hiring, hours and investment in the near term.

138 NAB, *Quarterly Business Survey*, Q2 2026. Note: NAB's Quarterly Business Survey reported business confidence of +1 in Q2 2025 and −19 in Q2 2026, while business conditions remained at +2 over the same period. Expectations for business conditions over the following 12 months also weakened, falling from +17 in Q1 2026 to +5 in Q2 2026.

139 ABS, *Business Conditions and Sentiments*, June 2026.

140 ABS, *Business Conditions and Sentiments*, June 2026.

141 Australian Government, The Hon Dr Anne Aly MP, Minister for Small Business, *Address to the Australian Restaurant & Cafe Association Industry Gala, Melbourne*, 31 August 2026.

142 RBA, *Financial Stability Review*, Chapter 2: Resilience of Australian Households and Businesses, March 2026.

143 Westpac-Melbourne Institute, *Consumer Sentiment*, August 2025 and August 2026.

144 Melbourne Institute, *Survey of Consumer Inflationary and Wage Expectations*, August 2026.

145 RBA, *Box A: Insights from liaison, Statement on Monetary Policy – May 2026*.



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Hospitality VET update 2025[146]

Total VET activity

Hospitality-related enrolments declined after several years of growth

2025 Enrolment profile

51% Female

63% Aged under 25

2025 Enrolments snapshot

70% were with private training providers, followed by schools (15%), TAFE institutes (12%), community education providers (2%) and universities (1%)

33% were in major cities, 16% in regional areas and 1% in remote areas, while a significant proportion were offshore.

21% were in Certificate II in Hospitality, making it the qualification with the highest enrolment.

The **average 4-year completion rate** for hospitality VET cohorts commencing in 2019 and 2020 was 49.5%, slightly above the 48.9% average for all VET cohorts commencing in the same years, and up from 47.1% for hospitality VET cohorts commencing between 2016 and 2018.

Source: SaCSA Data Dashboard, based on SaCSA analysis of NCVER VOCSTATS data, 2026.

146 Includes all hospitality-related qualifications within the SIT – Tourism, Travel and Hospitality Training Package.

Changes in VET activity, 2024 to 2025

Total enrolments

213,000

237,000 in 2024 | **-10%**

Domestic	112,000	**-2%**
International	100,000	**-18%**

53% Domestic

47% International

Total completions

91,000

97,000 in 2024 | **-6%**

Domestic	33,000	**-9%**
International	58,000	**-5%**

36% Domestic

64% International

Qualifications experiencing the largest changes

Qualification	Enrolments (percentage) 2024–2025	Completions (percentage) 2024–2025
Certificate III in Commercial Cookery	–44%	–51%
Certificate IV in Kitchen Management	–32%	–23%
Diploma of Hospitality Management	+12%	+42%
Advanced Diploma of Hospitality Management	+77%	+135%

What this means

The decline was largely driven by lower international enrolments

International enrolments fell by 18% in 2025, compared with a 2% decline in domestic enrolments. As a result, the domestic share of enrolments increased to 53%, despite domestic enrolments also declining. Lower international enrolments also contributed substantially to the declines in Certificate III in Commercial Cookery and Certificate IV in Kitchen Management.

The concentration of the decline in cookery-related qualifications is significant given continuing shortages of chefs and cooks. Domestic enrolments did not increase to offset the reduction in international enrolments. If sustained, these trends would weaken the training pipeline and constrain the future supply of workers with relevant vocational qualifications.

Apprenticeships, traineeships and VET in schools (VETiS)

School-based VET activity grew, while apprenticeship pathways weakened

Apprenticeships and traineeships, 2025

7,440
commencements

-12% from 2024; lowest since 2006

4,360
completions

-6% from 2024

Where activity was concentrated in 2025

Top qualifications	
Qualification	**Share of commencements**
Certificate III in Hospitality	50%
Certificate III in Commercial Cookery	27%

Top occupations	
Occupation	**Share of commencements**
Hospitality workers (nfd)	59%
Cooks	27%

The **average 4-year completion rate** for hospitality-related apprenticeships commencing in 2020 and 2021 was 34.9%, down from 43.8% for hospitality-related cohorts commencing between 2016 and 2019. It was also 10.5 percentage points below the 45.4% average for all apprenticeship cohorts commencing in 2020 and 2021.

VETiS, 2025

58,450

school-based VET enrolments

+10% from 2024

15,880

school-based VET completions

+7% from 2024

2025 Profile and the SBAT contrast

Leading VETiS qualifications		
Qualification	**Share of hospitality enrolments**	**Share of hospitality completions**
Certificate II in Hospitality	60%	56%
Certificate II in Cookery	23%	23%

Together, these 2 qualifications accounted for **83%** of enrolments and **79%** of completions.

School-Based Apprenticeships and Traineeships (SBATs)

1,410

commencements

-31% from 2024;
lowest since 2006

730

completions

+11% from 2024

2%

share of total VETiS enrolments

2015–2024 average:
around 6% each

5%

share of total VETiS completions

2015–2024 average:
around 6% each

What this means

School-based VET participation grew while apprenticeship and traineeship commencements declined

Hospitality VETiS enrolments increased by 10% from 2024 to 2025. Over the same period, hospitality-related apprenticeship and traineeship commencements fell by 12% to 7,440 in 2025, their lowest level since 2006. SBAT commencements fell more sharply, declining by 31% to 1,410, also their lowest level since 2006.

Although VETiS students may enter employment or further study through other pathways, declining apprenticeship and traineeship commencements mean fewer people are entering structured employment-based hospitality training, including through school-based pathways. If sustained, this could weaken an important component of the industry's skills pipeline.

Source: SaCSA Data Dashboard, based on SaCSA analysis of NCVER VOCSTATS data (2026).

Note: 'nfd' means not further defined.



Workforce impacts of technology, AI and automation

AI is a workforce issue that extends across industries and the JSC network. SaCSA is working with Future Skills Organisation (FSO) and other JSCs to contribute industry insights to national work on AI skills and workforce capability. This collaboration recognises that many of the capabilities required to work effectively with AI are transferable across sectors, while its workforce impacts will differ by industry and occupation.

In hospitality, these impacts are part of a broader shift in how technology is changing business operations and the way work is performed. AI, automation, self-service systems and other digital tools are creating opportunities to improve productivity and service delivery, while reshaping workers' tasks and the skills they need.

147 DEWR, *AI and employment in Australia: Monitoring framework and evidence to date*, July 2026.

148 National AI Centre, AI Adoption Tracker, hospitality industry data, accessed October 2026.

149 Tyro, *Australia's top hospitality innovators reveal three key trends transforming small business operations in 2025*, March 2025.

150 Boston Consulting Group, *AI-First Hotels: Faster to Build, Leaner to Operate, and Richer in Customer Experience*, March 2026; Deloitte, *The Future of Hospitality*, January 2026.

AI adoption and GenAI exposure

Recent Australian evidence suggests that AI has not yet caused widespread labour market disruption, although its longer-term impacts remain uncertain.[147] The analysis also found no disproportionate disruption among younger workers, which is particularly relevant to hospitality, given its comparatively young workforce.

AI adoption across hospitality remains uneven. The National AI Centre's AI Adoption Tracker indicates that 34.9% of Australian hospitality SMEs are adopting AI. Around 50% also agreed that AI is moving too fast, making it difficult to know when to invest.[148] However, AI is already being applied across a range of hospitality functions, including reservations, inventory forecasting, staff scheduling, pricing and other operational and customer service activities.[149, 150] SaCSA stakeholders also highlighted additional applications in crowd and queue management, predictive service planning and service personalisation, while emphasising the importance of data quality, governance and staff capability to use AI effectively.

Adoption rates show how widely AI is currently being used, but not where it has the greatest potential to change work. JSA's GenAI Capacity Study provides a different lens by assessing the potential for GenAI to augment or automate tasks across industries and occupations.[151]

At the industry level, accommodation and food services has lower GenAI exposure than the average across the 19 industries assessed, with a weighted augmentation score[152] of 58% and an automation score of 33%, compared with averages of 64% and 38% respectively. Looking at occupations and tasks provides a more detailed picture of where GenAI may reshape hospitality work.

Table 6 shows GenAI exposure across a range of hospitality occupations, including augmentation and automation scores, how each occupation compares with others assessed by JSA, and the tasks with the highest GenAI exposure. These scores indicate the potential for GenAI to augment or automate tasks within an occupation. They do not indicate the proportion of jobs likely to be displaced or the extent to which businesses will adopt GenAI. The full list of hospitality occupations and their GenAI scores is provided in Appendix B1.

Table 6: GenAI exposure across selected SaCSA hospitality occupations

Occupation (4-digit ANZSCO)	Augmentation exposure score	Automation exposure score	Tasks with highest GenAI exposure *Scores shown as augmentation / automation*
Café and restaurant managers	69% **Medium** *Higher than 62% of occupations assessed*	43% **Low** *Higher than 71% of occupations assessed*	• Maintaining records of stock levels and financial transactions: 80% / 70% • Arranging purchasing and pricing of goods according to budget: 70% / 60%
Chefs	65% **Medium** *Higher than 49% of occupations assessed*	31% **Low** *Higher than 42% of occupations assessed*	• Planning menus, estimating food and labour costs, and ordering food supplies: 80% / 50% • Explaining and enforcing hygiene regulations: 60% / 60%
Waiters	44% **Low** *Higher than 7% of occupations assessed*	28% **Low** *Higher than 35% of occupations assessed*	• Taking orders and relaying them to kitchen and bar staff: 70% / 60% • Recommending wines to complement food: 70% / 60%
Bakers and pastrycooks	54% **Medium** *Higher than 22% of occupations assessed*	23% **Very low** *Higher than 22% of occupations assessed*	• Monitoring oven temperatures and product appearance to determine baking times: 70% / 30% • Preparing pastry fillings: 70% / 30%
Kitchenhands	53% **Medium** *Higher than 19% of occupations assessed*	22% **Very low** *Higher than 19% of occupations assessed*	• Assembling and preparing ingredients for cooking, and preparing salads, savouries and sandwiches: 60% / 30% • Transferring, weighing and checking supplies and equipment: 60% / 30%

Source: SaCSA analysis of JSA, Gen AI Capacity Study Bespoke Tables 3 and 4, 2025. Scores of 70% or above are classified as high, 50–69% as medium, below 50% as low and below 25% as very low.[153] Exposure measures the potential for tasks to be augmented or automated and does not represent the proportion of jobs expected to disappear. 'Higher than x% of occupations' indicates how an occupation's GenAI exposure score compares with other occupations assessed by JSA.

Beyond GenAI: broader technology impacts

JSA's exposure measures relate specifically to GenAI and do not capture the full range of technological change affecting hospitality. Other forms of technology, including self-service systems, digital automation and robotics, can affect a different set of tasks, particularly routine or repetitive physical and administrative work.

Digital workforce management systems can automate elements of rostering, demand forecasting and award administration, thereby reducing routine administrative work for managers and supervisors.[154] SaCSA stakeholder consultations also highlighted self-service kiosks and automated check-in/check-out as examples of digital systems that are changing customer-facing processes. Stakeholders emphasised the importance of integrating these technologies with in-person service, while some also raised concerns that greater reliance on digital and self-service channels could reduce opportunities for face-to-face interaction and the development of communication and service skills.

Overall, the evidence suggests that different technologies will affect hospitality tasks in different ways. While some routine physical, transactional and administrative tasks may be automated or reduced, workers may increasingly need to operate alongside digital and automated systems and intervene where human judgement, compliance or customer interaction is required.

Skills and training implications

As digital systems, AI and automation reshape tasks across hospitality, they also have implications for how workers are prepared and upskilled. The training challenge is not only to build capability in new technologies, but also to ensure workers can apply them effectively alongside the occupational, interpersonal and judgement-based skills that remain central to hospitality work.

Stakeholders emphasised the continuing importance of interpersonal capability. Industry participants highlighted communication, conversation and service skills as central to hospitality work. Some suggested that these capabilities may become more valuable as routine tasks are increasingly automated. JSA's analysis of VET pathways suggests that hospitality qualifications are more exposed to augmentation by GenAI than to automation (See Appendix B2).[155] This reinforces the need to prepare workers to use technology as part of their work, rather than assuming technology will replace the underlying task, skill or occupation.

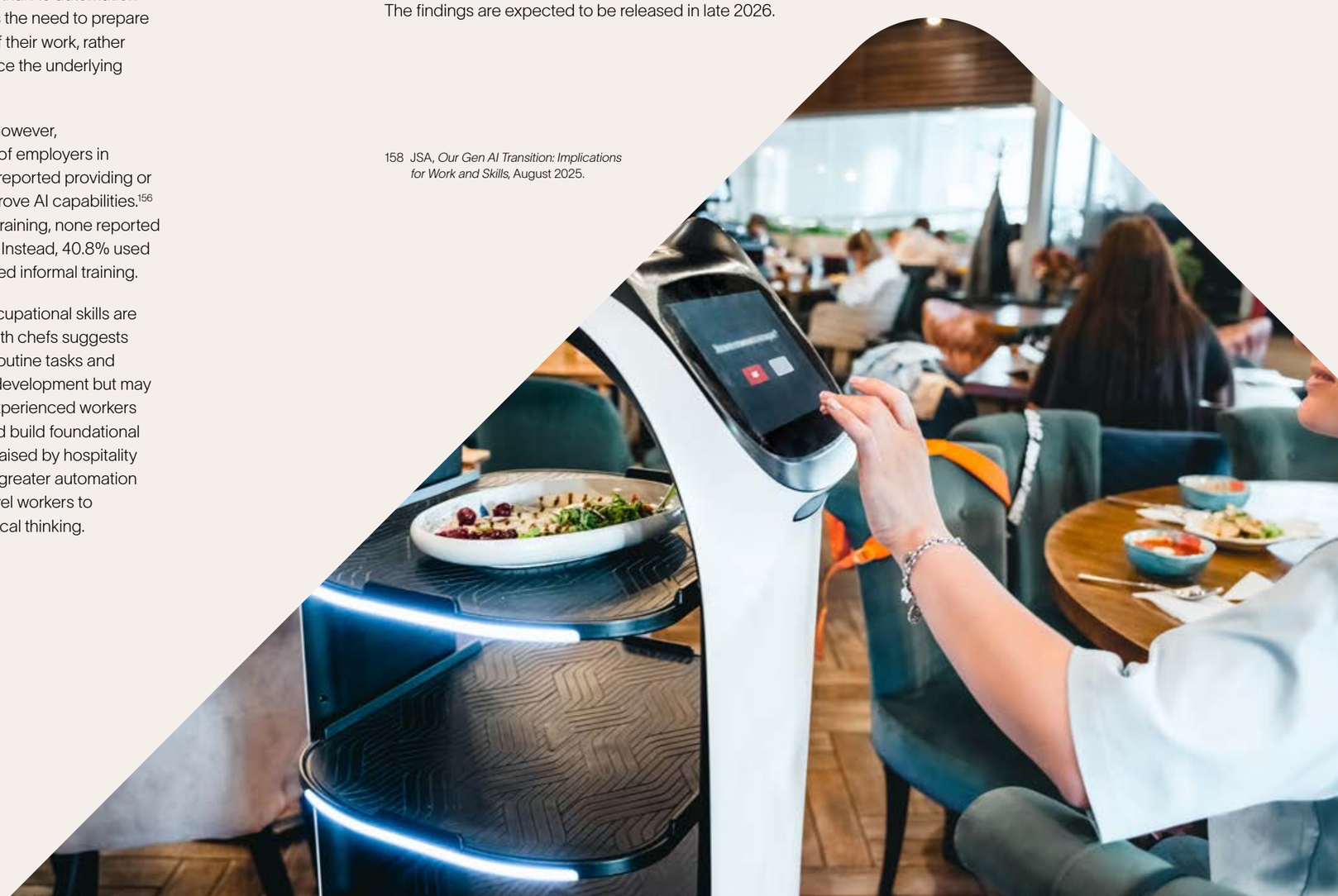
Employer training in AI capabilities, however, remains limited. In 2025, only 14.2% of employers in accommodation and food services reported providing or arranging training to maintain or improve AI capabilities.[156] Among employers that provided AI training, none reported using nationally recognised training. Instead, 40.8% used unaccredited training and 59.2% used informal training.

Technology may also affect how occupational skills are developed. International research with chefs suggests that technology can free time from routine tasks and support creativity and professional development but may also reduce opportunities for less experienced workers to practise traditional techniques and build foundational craft skills.[157] Similar concerns were raised by hospitality stakeholders about the potential for greater automation to reduce opportunities for entry-level workers to develop practical capability and critical thinking.

These findings reinforce the need for training responses that support technology adoption without weakening the development of core occupational skills. JSA also identifies a role for shorter and more flexible training to support rapid upskilling, alongside a need for trainers and assessors to maintain current knowledge of emerging technologies and industry practice.[158]

Overall, the training response is unlikely to be simply a matter of adding standalone AI skills. Workers will increasingly need to use emerging technologies, while continuing to develop the technical, interpersonal and judgement-based capabilities that underpin hospitality work.

SaCSA is undertaking research into how AI, automation and robotics are reshaping jobs, skills and workforce pathways across the service and creative sectors. The findings are expected to be released in late 2026.



151 JSA, *Our Gen AI Transition: Implications for Work and Skills*, August 2025.

152 Note: JSA industry scores are weighted by occupational composition using 2021 Census data, meaning larger occupations contribute more to the industry exposure score.

153 JSA, *Our Gen AI Transition: Implications for Work and Skills – Final Overarching Report*, 14 August 2025.

154 Deputy, *5 Key Business Benefits of the Digital Roster*, 2026.

155 JSA, *Our Gen AI Transition: Exposures & VET*, September 2025. Hospitality and all-VET averages calculated by SaCSA from JSA program-level data.

156 NCVER, *Employers' use and views of the VET system 2025: data tables*, December 2025

157 Seyitoğlu, F., Fusté-Forné, F., Yiğit, S. and Engin, S., 'The role of technology in the skills and creativity of chefs', *European Journal of Tourism Research*, January 2025.

158 JSA, *Our Gen AI Transition: Implications for Work and Skills*, August 2025.



Policy and regulatory landscape

Policy and regulatory changes continue to shape hospitality workforce supply, employment conditions, training pathways and technology adoption. During 2025–26, developments across workplace relations, training and apprenticeships, migration, international education, technology and AI policy have presented both opportunities and challenges for hospitality businesses.

Migration settings remain important to hospitality workforce supply. Industry stakeholders have identified increased visa costs, extended processing times and changes to Working Holiday Maker (WHM) arrangements as factors that may influence the availability of temporary and migrant workers. Understanding the workforce implications of these settings is particularly important given that migrant-held jobs accounted for around 38% of jobs in accommodation and food services in 2022–23, compared with around 29% across all industries.[159]

Accommodation and Food Services was the second-largest sponsor industry nationally for temporary skilled visas in the first half of 2025-26, accounting for 14.8% of all primary grants.[160] Chef was the single largest nominated occupation across Australia's temporary skilled visa program in the first half of 2025-26, with 3,280 primary visas granted, representing 9.5% of the entire program.[161]

The WHM program remains an important source of labour for hospitality, particularly in regional areas and businesses experiencing seasonal workforce demand. Tourism and hospitality work remains exempt from the usual six-month limit on working for the same employer, providing flexibility for businesses to retain WHMs for longer periods.[162] WHMs account for an estimated 3.5% of accommodation and food services jobs outside major cities, equivalent to around 24,040 jobs.[163] Understanding how changes to WHM participation affect regional and seasonal workforce availability will be important for workforce planning, alongside continued efforts to strengthen domestic training and employment pathways. International education settings may also affect the sector's labour and skills pipeline. Student visa application charges increased from 1 July 2026,[164] and the Australian Government confirmed that the national planning level for new overseas student commencements will remain at 295,000 in 2027.[165] From 2027, TAFE students will be exempt from the national planning level, while other VET providers will continue to operate within the Australian Government's managed system for international education.[166] These settings are particularly relevant to hospitality, where international students accounted for 47% of VET enrolments in 2025 and also contribute to the sector's workforce.[167] Stakeholders have raised that these changes in international enrolment patterns could affect the viability of some hospitality training provision, particularly where domestic enrolment demand is limited. Monitoring these developments will be important to understanding their implications for training availability and future workforce supply.

Taken together, these changes reinforce the need to strengthen domestic workforce and training pipelines, while recognising that these pipelines take time to develop. Migrant workers, WHMs and international students therefore remain important contributors to hospitality workforce supply, particularly where domestic supply is insufficient. Migration and international education settings will remain an important consideration in workforce planning as the sector strengthens its domestic pipeline.

159 ABS, *Jobs in Australia, 2022–23*, "Employed migrants", released 13 December 2024. Percentages calculated from ABS job counts. In this release, migrants include temporary visa holders and permanent migrants who arrived in Australia from 1 January 2000.

160 Department of Home Affairs, *Temporary resident (skilled) report 31 December 2025: Summary of key statistics and trends*, 2026.

161 Department of Home Affairs, *Temporary resident (skilled) report 31 December 2025: Summary of key statistics and trends*, 2026.

162 Department of Home Affairs, *Working Holiday Maker program (Exemptions to condition 8547)*, 2026.

163 ABS, *Jobs in Australia (2022–2023)*, 2025.

Notes and caveat: ABS Jobs in Australia data counts jobs, not individual workers. A working holiday maker may therefore be counted more than once if they held multiple jobs during the financial year.

Australian citizens have been excluded from the analysis because their visa status before gaining citizenship cannot be reliably determined.

The share of total industry jobs is an estimate. The denominator is based on the ABS Jobs in Australia 2022–23 figure that accommodation and food services accounted for 8.8% of all Australian jobs, rounded to one decimal place, as the visa analysis tables do not provide an exact industry denominator.

164 Department of Home Affairs, *Student visa (subclass 500)*, July 2026.

165 DEWR, *A managed system for international education in 2027*, July 2026.

166 DEWR, *A managed system for international education in 2027*, July 2026.

167 *SaCSA Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.

Changes to apprenticeship and training policy are also influencing workforce development pathways across hospitality. From 1 January 2026, changes to the incentive system adjusted financial support for new commencements and recommencements in eligible priority apprenticeships, including hospitality apprenticeships.[168] Further reforms from 1 January 2027 will target certain employer incentives to employers with fewer than 200 employees and group training organisations, while also changing the methodology used to determine the Australian Apprenticeships Priority List.[169] These changes highlight the importance of understanding the factors influencing employer participation and apprenticeship commencements to support sustainable training pathways and future workforce supply.

Developments in AI policy are also shaping the broader context for future workforce skills and capability requirements. The Australian Government released its National AI Plan in December 2025, setting out priorities to support AI adoption, build workforce capability and promote safe and responsible use.[170] For hospitality, these settings provide broader policy context as businesses consider how AI and automation may change tasks, skills requirements and workforce practices.

Worker safety and employment conditions have also received greater policy attention. In New South Wales, the Night Worker Action Plan 2025–2028 sets out measures relating to safety, wellbeing, transport, access to services and recognition of people working between 6pm and 6am. Accommodation and food services accounts for around 158,300 of New South Wales' night workers, making hospitality one of the major industries affected.[171] In Victoria, the government-supported Workplaces for Women: Safe Staff, Safe Venues initiative examined issues including wage theft, rostering, gender discrimination, occupational health and safety, and awareness of workplace rights in hospitality and events workplaces.[172] By addressing safety, insecurity and access to support, these initiatives may improve job quality and support workforce attraction and retention in hospitality.

Employers also continue to contend with changes to business conditions and regulations that may affect their ability to attract and retain their workforces.

The policy and regulatory landscape presents both opportunities and challenges for the hospitality sector and its workforce. Government strategies are supporting visitor economy growth and creating workforce opportunities for the hospitality sector. At the same time, businesses are navigating impacts to labour and training costs, changing migration and international education settings, and persistent skills shortages, highlighting the importance of ongoing workforce planning.

Ensuring that workforce supply, training pathways and skills development keep pace with visitor economy growth will be critical to supporting a productive, resilient and sustainable hospitality sector.

168 Australian Apprenticeships, *Changes to the Australian Apprenticeships Incentive System from 1 January*, 2025.
169 Australian Apprenticeships, *Changes to Australian Apprenticeships Incentive System from 1 January 2027*, May 2026.
170 Department of Industry, Science and Resources, *National AI Plan*, December 2025.
171 NSW Government, *NSW Night Worker Action Plan 2025–2028*, October 2025.
172 Victorian Trades Hall Council, *Our passion, our profession and our livelihood: Building secure, safe and equal hospitality*, May 2026.

Current workforce issues and priorities

SaCSA's workforce analysis and stakeholder engagement point to 3 interconnected workforce issues for hospitality: persistent labour shortages and workforce supply pressures; challenges in attracting and retaining workers and supporting career progression; and the need to strengthen training and workforce capability. These pressures are not experienced evenly; particular challenges are evident across some occupations and regional areas.

These issues are unfolding within a changing operating environment shaped by cost and demand pressures, migration and training patterns, technological change and evolving expectations around work. They influence the sector's ability not only to attract workers, but also to build capability, retain experience and sustain its workforce over time.

Labour shortages and workforce supply

Labour shortages remain a significant workforce issue for hospitality, although pressures vary across occupations and locations. In 2026, shortages persisted across key culinary occupations. Cooks, chefs, senior chefs and pastrycooks were all assessed as being in national shortage.[173]

Several interconnected factors are constraining workforce supply. The domestic training pipeline remains under pressure: domestic hospitality enrolments declined slightly in 2025, while apprenticeship and traineeship commencements fell by 12% to their lowest level since 2006.[174]

At the same time, employers continue to place a high value on experience. More than 4 in 5 accommodation and food services job postings in the 12 months to July 2026 specified prior experience, and 37% required at least 3 years.[175] Where labour supply is already limited, these expectations can further narrow the pool of suitable applicants.

Migration remains an important source of workforce supply for hospitality. In 2022–23, migrants held around 38% of jobs in the accommodation and food services industry.[176] Changes affecting access to migrant labour can therefore have significant implications for workforce availability and, where shortages cannot be readily filled through other sources, may also constrain business operations.

Competition for workers is also likely to intensify as employment grows strongly in other parts of the economy. Health care and social assistance employment is projected to grow by around 23% over the decade to 2035, compared with around 10% growth in accommodation and food services.[177] Recent research indicates that hospitality is among the industries from which workers commonly move into care roles, suggesting that continued care sector growth may intensify competition for workers.[178]

Together, these factors suggest that shortages are likely to persist. Workforce supply pressures may intensify if training and migration pipelines weaken or competition from faster-growing industries increases, while employers' strong preference for experience may continue to narrow the pool of suitable applicants.

Chef and cook workforce shortages

These broader workforce supply pressures are particularly evident in the chef and cook workforce. Current research points to a combination of workforce retention challenges, a weakening domestic training pipeline, strong demand for experienced workers and continued reliance on migration.

Recent training trends add to concerns about the future pipeline. Declines in hospitality enrolments in 2025 were concentrated in key cookery qualifications and were largely driven by lower international enrolments, while domestic enrolments did not increase to offset the reduction.[179] This is particularly significant given the continued shortage of chefs and cooks and the sector's reliance on a steady flow of new entrants.

SaCSA's Culinary Careers project is examining the drivers of persistent chef and cook shortages in greater detail, including the factors affecting workforce attraction, training, retention and supply.

Alongside this research, SaCSA is developing a National Chef Workforce Action Plan as a separate national workforce initiative. The action plan will provide a shared framework for coordinated action across industry, governments, education providers, unions and workforce partners, and will focus on strengthening attraction, training and retention across the chef workforce. It will identify priority workforce challenges, potential strategic responses and opportunities for collaborative action.

173 JSA, *Occupation Shortage List 2026*, 2026.
174 *SaCSA Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.
175 Lightcast, *Labour Insights*, job postings for accommodation and food services, July 2026.
176 ABS, *Jobs in Australia, 2022–23*, November 2025. Migrants are defined as temporary visa holders or permanent migrants who arrived in Australia since 1 January 2000.
177 JSA, *2025 Employment Projections*, 2025.
178 Matthew Maltman, *How the Care Economy is Reshaping the Labour Market*, e61 Institute Research Note No. 30, September 2025.
179 *SaCSA Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.



Regional workforce challenges

Hospitality has a substantial regional workforce; around one-third of workers in accommodation and food services are employed in regional Australia.[180] Sustaining this workforce depends on access to local workers and the ability to attract and retain workers from outside the region.

These findings are consistent with recent SaCSA stakeholder engagement, which indicates that some regional businesses continue to experience difficulty attracting experienced workers, including supervisors and other leadership roles. Stakeholders also reported continued reliance on WHMs, sponsored visa holders and international students to supplement local workforce supply. This reliance means changes in migration settings and the availability of temporary workers can have significant negative impacts on regional workforce supply.

Regional employers' ability to attract and retain workers is also shaped by local conditions, particularly where workers need to relocate. Stakeholders identified housing availability and cost, broader cost-of-living pressures and limited public transport as barriers to regional employment. Some employers reported including accommodation as part of employment packages, while others noted that rising accommodation and living costs can reduce the attractiveness of regional work, particularly for international workers. Recent Australian research found that a lack of affordable and available accommodation can make it more difficult for regional businesses to attract and retain workers.[181]

Limited access to local training and workforce development can create an additional constraint. Stakeholders reported limited access to local training in some regional areas, including gaps in commercial cookery provision, as well as barriers to professional development and shortages of qualified supervisors. Seasonal peaks and major events can further compound these pressures by increasing workforce requirements when local labour supply is already constrained.

Together, these factors mean regional workforce challenges extend beyond filling vacancies to whether workers can be attracted, trained and retained in the places where they are needed.

SaCSA's projects and activities

The following SaCSA projects and activities are designed to investigate and respond to key workforce and skills issues identified in this Workforce Plan:

- Culinary Careers: Exploring the Drivers of Chef and Cook Shortages
- National Chef Workforce Action Plan
- Visitor Economy Workforce Projections Project
- Scoping Service Sector Futures: Career Journey Mapping
- Early Career Mobility Analysis and Dashboard.

Strategic opportunities for the hospitality sector

The following strategic opportunities highlight areas where further consideration or action could help address the workforce and skills issues identified in this Workforce Plan:

- Use the National Chef Workforce Action Plan to support the identification and prioritisation of collaborative responses to persistent chef and cook shortages, drawing on SaCSA's workforce research and industry engagement across attraction, training and retention.
- Explore, with industry, government and training providers, practical responses to regional workforce constraints, particularly in areas relevant to workforce development such as access to training, workforce pathways and mobility. Evidence on broader barriers, such as housing, transport and seasonal demand, can also inform SaCSA's industry stewardship and engagement with relevant stakeholders.
- Use existing evidence on domestic workforce supply and migration to inform future workforce planning, policy advice and industry stewardship, including consideration of the complementary roles of domestic workforce development and migration in addressing persistent workforce gaps.

180 JSA, *Australian Jobs 2026*, 2026, based on ABS, Labour Force, Australia, Detailed, November 2025.

181 Tod Jones et al., *Safe and secure accommodation solutions for seasonal and vulnerable workers in regional industries*, AHURI Final Report No. 447, October 2025.

Attraction, retention and career pathways

Large numbers of workers continue to enter hospitality, but workforce mobility remains high. In the year to February 2026, around 198,900 people entered a job in accommodation and food services as new entrants to employment, the second-highest number of any industry.[182] At the same time, the industry recorded a job mobility rate of 15.4%, more than double the national rate of 7.2%.[183]

This pattern of high entry and mobility sits alongside evidence that hospitality is not always viewed as a long-term career. Recent Australian research with front-of-house hospitality workers found that hospitality work was often viewed as a temporary or 'pathway' job rather than a profession. Low wages, poor employment conditions and limited opportunities for career progression contributed to this perception.[184]

These dynamics also need to be understood in the context of hospitality's workforce profile. The accommodation and food services workforce has a median age of 26, and 61% of workers were employed part-time and 58% of employees were employed on a casual basis in August 2025.[185]

Retention pressures are also evident in key hospitality occupations. JSA's 2026 shortage-driver analysis identified a retention gap for cooks, indicating that difficulty retaining workers is contributing to shortage in this occupation group.[186] SaCSA analysis also shows that occupational retention varies considerably. The proportion of new workers remaining in the same occupation after 3 years ranged from 53% for chefs and 44% for hotel or motel managers to 29% for cooks and 27% for waiters.[187] These figures do not distinguish between movement to another hospitality occupation, movement to another industry and exit from employment.

For chefs, progression into related managerial roles also appears relatively limited. SaCSA's longitudinal analysis found that around one in 8 chefs transitioned into a related managerial role within 5 or 10 years.[188]

Together, these patterns suggest that hospitality's workforce challenge is not simply attracting people into the sector, but turning high levels of entry into sustained participation, clearer progression and longer-term careers.

School-to-industry pathways

School-based VET provides an important point of exposure to hospitality and a potential pathway into the industry. However, stakeholder feedback indicates that this does not consistently translate into employment-based pathways or longer-term industry outcomes. From 2024 to 2025, hospitality VETiS enrolments increased by 10%, while school-based apprenticeship and traineeship commencements fell by 31% to their lowest level since 2006.[189]

Stakeholder feedback indicates that pathways from school-based hospitality training into employment, apprenticeships, further study and longer-term industry participation are not always clear or consistent. Employers identified inconsistent work placement arrangements, limited school–employer engagement, insufficient practical workplace exposure and gaps in students' workplace-readiness skills.

Without clear transitions into work or further training, early exposure to hospitality may not translate into sustained industry participation or contribute fully to the domestic workforce pipeline. Strengthening connections between schools, employers and training pathways could help students gain meaningful workplace experience and identify clearer next steps into hospitality careers.

SaCSA's projects and activities

The following SaCSA projects and activities are designed to investigate and respond to key workforce and skills issues identified in this Workforce Plan:

- Structured Approach to Industry and School Programs
- Scoping Service Sector Futures: Career Journey Mapping
- Early Career Mobility Analysis and Dashboard
- Culinary Careers: Exploring the Drivers of Chef and Cook Shortages
- National Chef Workforce Action Plan.

Strategic opportunities for the hospitality sector

The following strategic opportunities highlight areas where further consideration or action could help address the workforce and skills issues identified in this Workforce Plan:

- Explore opportunities to strengthen the visibility and connections across hospitality career pathways, including school-to-industry connections, practical industry experience and clearer links between education, training and employment.
- Use emerging evidence on workforce movements and career journeys to identify opportunities to strengthen retention and longer-term participation, with a focus on the factors influencing workers to remain in, return to and move within the sector.
- Explore opportunities to support clearer progression into supervisory and management roles, including clearer career pathways and opportunities for workers to build the skills and experience required for leadership positions.

182 ABS, *Job mobility, February 2026*, released 31 July 2026.

183 ABS, *Job mobility, February 2026*, released 31 July 2026. Industry job mobility rates are classified according to the industry of the job left. Job mobility refers to changing employer or business and may involve movement within or outside the industry.

184 David Farrugia et al., "Youth and hospitality work: skills, subjectivity and affective labour", *Journal of Sociology 61*, no. 3 (2025).

185 JSA, *Accommodation and Food Services: Occupation and Industry Profiles*, 2026, based on ABS, *Labour Force Survey, 2025, 4-quarter average data*; ABS, Working arrangements, August 2025.

186 JSA, *2026 Occupation Shortage Drivers Report*, 2026.

187 SaCSA, *Early Career Mobility Analysis*, using ABS Person Level Integrated Data Asset (PLIDA), based on 2018–19 and 2019–20 new workers in selected occupations tracked over 3 years.

188 SaCSA longitudinal analysis of chefs using ABS Australian Census Longitudinal Dataset, 2011–2021.

189 *SaCSA Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.



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Training and workforce capability

Hospitality's workforce capability depends not only on participation in or completion of formal training, but also on whether people develop and apply the skills employers need, and whether they have opportunities to continue developing as their careers and workplace requirements evolve.

Formal completion nevertheless provides one indicator of training outcomes. For hospitality-related qualifications, 4-year completion rates averaged around 48% across the 2016 to 2020 commencing cohorts. Hospitality-related apprenticeships and traineeships recorded 4-year completion rates averaging around 41% across the 2017 to 2021 commencing cohorts.[190]

Completion is only one part of the challenge. The job readiness of people entering the workforce also remains a concern. Hospitality stakeholders continue to identify gaps in areas such as communication, teamwork and understanding of workplace procedures, alongside concerns about whether training provides the practical knowledge and skills expected by industry. Stakeholder engagement informing the Culinary Qualifications Review has similarly identified concerns that existing culinary qualifications do not sufficiently reflect the knowledge, skills and practical application expected of graduates.[191]

Current shortage analysis also points to pressures in the training pipeline. JSA's 2026 shortage-driver analysis identified an education and training gap for chefs and for bakers and pastrycooks.[192] JSA applies this classification where commencements, completions and the supply of qualified applicants are insufficient to meet labour market demand. This provides further evidence of pressure on education and training pathways for key culinary occupations.

The extent to which training leads to employment in related occupations also varies across qualifications. SaCSA's Early Career Mobility Analysis found that 58% of Certificate IV in Kitchen Management completers became chefs. For Certificate III in Commercial Cookery, 64% of completers entered employment as either a chef or cook. However, alignment was lower for some other qualifications, including Certificate IV in Patisserie, where 17% of completers became pastrycooks, and Certificate III in Hospitality, where 19% entered the hospitality workers occupation group.[193, 194]

Workforce capability requirements are also continuing to evolve. As outlined earlier in this Workforce Plan, digital systems, AI and automation are increasing the need for digital capability alongside communication, service, judgement and practical skills. Stakeholders have also raised concerns that greater automation could reduce some opportunities for entry-level workers to develop occupational capability through practice. Training therefore needs to prepare workers to use emerging technologies while ensuring that core occupational and interpersonal skills continue to be learned and practised.

Leadership and management capability

Leadership and management capability remains an important workforce concern. The Australian Chamber of Commerce and Industry has identified gaps in leadership, business management and human resource skills across the sector.[195] SaCSA's Early Career Mobility Analysis also points to challenges in maintaining and developing the leadership pipeline. After 3 years, 41% of new café or restaurant managers and 44% of new hotel or motel managers remained in those occupations.[196] Progression into management was also relatively uncommon: only around 1% of chefs, cooks and waiters progressed into café or restaurant manager roles over 3 years, while only 3% of hotel or motel receptionists and 4% of hotel service managers progressed into hotel or motel manager roles. The analysis did not identify a single dominant pathway into hospitality management roles.

190 *SaCSA Data Dashboard*, based on SaCSA analysis of NCVER VOCSTATS data, 2026.

191 SaCSA, *Tourism, Travel and Hospitality Workforce Plan Update 2025*, Culinary Qualifications Review, 2025.

192 JSA, *2026 Unit Group Shortage List - 4 digit ANZSCO*, 2026.

193 SaCSA, *Early Career Mobility Analysis*, using ABS Person Level Integrated Data Asset (PLIDA), based on 2016–2018 qualification completers and part-completers.

194 Note: Qualification-to-occupation mappings do not capture every relevant employment pathway. For example, Certificate III in Commercial Cookery is mapped to cook, although SaCSA's analysis found that chef was a much more common first occupation, accounting for 52% of completers compared with 12% entering as cooks.

195 Australian Chamber of Commerce and Industry, *Travel, Tourism, Hospitality, Accommodation and Events Workforce Development Strategy 2023 Report*, 2023.

196 SaCSA, *Early Career Mobility Analysis*, using ABS Person Level Integrated Data Asset (PLIDA), based on 2018–19 and 2019–20 new workers in selected occupations tracked over 3 years.

SaCSA stakeholder engagement has consistently highlighted these challenges. Stakeholders have pointed to the loss of experienced supervisors and middle managers during and following the COVID-19 pandemic, alongside ongoing retention and progression pressures that can leave fewer workers in the sector long enough to build leadership capability.

Some businesses reported that junior workers were progressing into supervisory and management roles after only 6 to 12 months, sometimes without adequate development or support. Stakeholders indicated that this can reduce productivity and contribute to retention challenges, as emerging leaders may be required to manage difficult workplace situations while also supervising, mentoring and developing less experienced staff before they have had sufficient preparation themselves.

The demands placed on hospitality leaders also extend well beyond operational expertise. Stakeholders identified people management, financial acumen, human resource capability, conflict resolution, emotional intelligence and de-escalation as increasingly important. Frontline and junior managers may also carry significant compliance and regulatory responsibilities, including food safety, workplace safety, workplace relations, licensing and responding to customer aggression.

These management responsibilities are made more complex by the psychosocial risks present across service work and the associated work health and safety obligations. Safe Work Australia's 2026 profile of sales and service workers, which includes a range of hospitality occupations, identified exposure to bullying, violence and aggression, high job demands, low job control and limited support as key workplace risks.[197]

Concerns remain that training and development pathways do not always prepare emerging leaders for these responsibilities. Access to leadership development also varies across the sector. Larger employers are generally better placed to provide structured internal programs, mentoring and capability frameworks than many smaller businesses. Smaller businesses have highlighted the need for more accessible, practical and flexible development options, including shorter, targeted training, skill sets and micro-credentials that build specific leadership capabilities without necessarily requiring a full qualification. These challenges have broader workforce implications, by influencing workplace culture, safety, retention and the quality of supervision and development available to apprentices and less experienced workers.

Overall, these factors point to a leadership pipeline challenge, rather than simply a shortage of managers. Lower retention reduces the pool of experienced workers available to progress, while rapid progression can place emerging leaders in increasingly complex roles before they have received sufficient development or support.

SaCSA's projects and activities

The following SaCSA projects and activities are designed to investigate and respond to key workforce and skills issues identified in this Workforce Plan.

- Review of Culinary Qualifications
- Culinary Skills for Aged Care Food Service
- Cooking with Care: Designing Learning Resources for Culinary Skills in Aged Care Food Service
- National Chef Workforce Action Plan
- RSA Language Review Project (completed)
- Service Skills Portability and Pathways (AQF Level 2)
- VET Workforce Project
- Customer Aggression: Designing Learning Resources to Support Service Industries
- Identifying Training Solutions Relating to Drink Spiking and Alcohol-Related Violence (completed).

Strategic opportunities for the hospitality sector

The following strategic opportunities highlight areas where further consideration or action could help address the workforce and skills issues identified in this Workforce Plan:

- Support the implementation, promotion and monitoring of updated qualifications and new skill sets, including helping learners and employers understand new progression pathways and how these products can support upskilling, reskilling and workforce retention.
- Explore opportunities to improve the alignment of training with industry needs and job readiness, including practical skill development, communication and interpersonal capability.
- Explore where training and workforce development could better support leadership and supervisory capability, including people management, mentoring and staff development, managing difficult workplace situations, and practices that support safe and respectful workplaces.
- Explore more flexible, transferable and responsive approaches to skills development, including recognition of common service sector skills and shorter or targeted forms of upskilling as workforce and technology requirements evolve.
- Explore opportunities to address barriers to training and workforce development, particularly in regional areas, and to support the capability and industry currency of trainers and assessors.

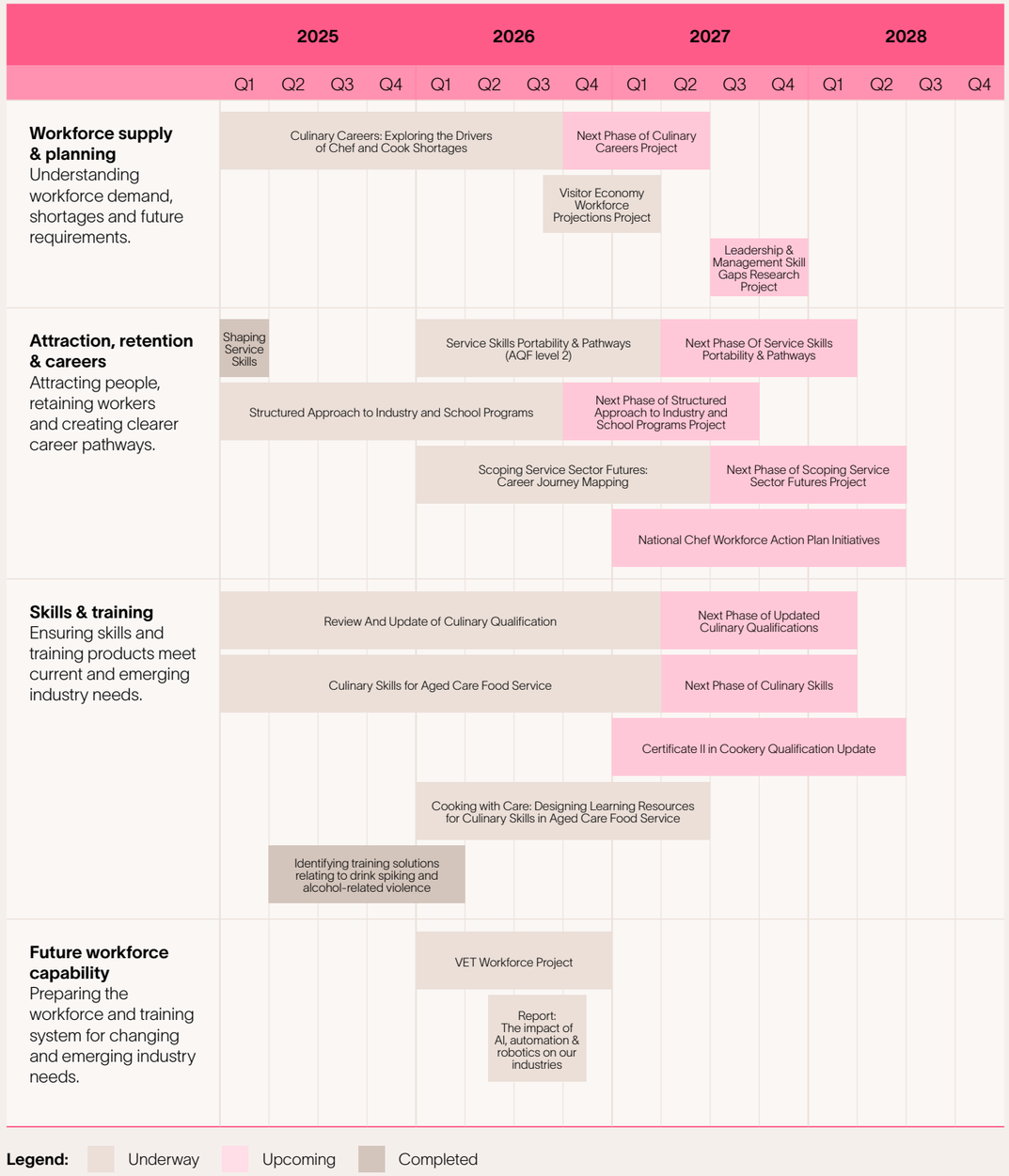
197 Safe Work Australia, *WHS Profile: Sales and Service Workers*, August 2026.

From evidence to action

SaCSA's Hospitality Work Plan sets out how we are responding to the workforce challenges, priorities and opportunities identified through our research, data analysis and industry engagement (Figure 8). It brings together the key projects and activities underway and planned across the life of this Workforce Plan, showing how our work will contribute to addressing current workforce needs, while preparing for emerging and longer-term challenges.

The Work Plan is organised around 4 areas of focus: workforce supply and planning; attraction, retention and careers; skills and training; and future workforce capability. Together, these activities demonstrate how the evidence and stakeholder insights presented throughout this Workforce Plan translate into practical action.

Figure 8: Hospitality work plan



SaCSA's projects and activities

The projects and activities below provide further detail on the work SaCSA is undertaking in response to the workforce priorities and challenges identified in this Workforce Plan. They reflect our ongoing work with industry to build the evidence base, address workforce and skills needs and support longer-term workforce development.

Projects are grouped as **active**, **planned** or **completed**, providing a snapshot of SaCSA's current and recent work and a short overview of the purpose and focus of each project. SaCSA's program of work will continue to evolve as projects progress, new evidence emerges and industry priorities change.

Active

Project title	Project description	Project details
Cooking with Care: Designing Learning Resources for Culinary Skills in Aged Care Food Service	This project is developing practical learning resources, trainer materials and assessment guidance to support the rollout of new Culinary Skills for Aged Care Food Service units of competency. The resources will help chefs and cooks develop the specialised skills needed to provide safe, nutritious and appropriate food in aged care and similar care settings.	Click to view project details
Culinary Careers: Exploring the Drivers of Chef and Cook Shortages	This research project is examining the drivers behind persistent chef and cook shortages, including labour demand, the domestic training and apprenticeship pipeline, migration, workforce retention and working conditions. The research will strengthen SaCSA's evidence base on the factors affecting chef and cook workforce supply and help inform future workforce responses.	Click to view project details
Culinary Skills for Aged Care Food Service	SaCSA is developing training products to address identified skills and knowledge gaps for hospitality workers who prepare food in aged care and related care settings.	Click to view project details
Customer Aggression: Designing Learning Resources to Support Service Industries	SaCSA is developing practical, industry-informed learning resources to support training that equips customer-facing workers, supervisors and managers to recognise and respond to customer aggression.	Click to view project details
Early Career Mobility Analysis and Dashboard	This project uses linked ABS data to track how people move from education and training into employment and progress through their early careers across SaCSA's sectors, including hospitality. The findings help address evidence gaps around career pathways, progression and retention, and underpin SaCSA's Early Career Mobility Dashboard, an interactive dashboard that will be launched in 2026 to help industry explore the findings and support career guidance, workforce planning and training initiatives.	
National Chef Workforce Action Plan	This project is developing a coordinated national framework to strengthen Australia's chef workforce. The action plan will identify priority workforce challenges and potential strategic responses, guide future initiatives and provide a shared framework for coordinated action to strengthen Australia's long-term domestic chef workforce across 3 interconnected areas: attraction, training and retention.	

Project title	Project description	Project details
Report: The Impact of AI, Automation and Robotics on our Industries	This project explores the current and potential future impacts of AI, automation and robotics on SaCSA's industries. It will provide an understanding of the challenges and opportunities posed by technological advancements.	
Review of Culinary Qualifications	SaCSA is reviewing and updating 4 Certificate III qualifications in Commercial Cookery, Catering, Patisserie and Asian Cookery to ensure they remain fit for purpose and aligned with current industry needs. The project responds to stakeholder concerns that existing qualifications do not sufficiently reflect the knowledge, skills and practical application expected of culinary graduates.	Click to view project details
Scoping Service Sector Futures: Career Journey Mapping	SaCSA is mapping how people enter, move through and progress within careers across personal services, retail, tourism and hospitality. The project uses national data and industry consultation to identify entry points, career transitions, progression pathways and points of workforce exit.	Click to view project details
Service Skills Portability and Pathways (AQF Level 2)	This project is exploring whether common entry-level skills across service industries could be recognised more consistently, to reduce duplication and make it easier for learners and workers to move between sectors.	Click to view project details
Structured Approach to Industry and School Programs	This work is examining how high school students engage with and perceive tourism and hospitality pathways. A national student survey is currently underway to explore students' awareness and perceptions of the industries; participation in school and industry programs; barriers to participation; and their experiences of existing pathways. The findings will help identify where school-to-industry connections and student exposure could be strengthened.	Click to view project details
VET Workforce Project	As part of a national program aligned with the Australian Government's VET Workforce Blueprint, this work focuses on understanding and addressing key challenges affecting the VET workforce. Its broader aim is to support a strong, sustainable workforce of VET teachers, trainers and assessors that can meet industry skills and training needs.	Click to view project details
Visitor Economy Workforce Projections Project	This project will estimate future workforce requirements across Australia's visitor economy, and translate projected tourism demand into national, state and occupational employment projections. It will also consider workforce supply, seasonal peaks and major events to identify where future workforce pressures may emerge, including across hospitality occupations.	

Planned

Project title	Project description
Certificate II in Cookery Qualification Update	This project will review and update the Certificate II in Cookery qualification to ensure it reflects current and emerging workforce needs. The review will aim to strengthen practical, transferable and future-focused skills and support clear and relevant pathways for learners and the workforce.
Leadership and Management Skills Gaps	This research will examine leadership and management capability gaps across tourism, travel and hospitality, including pathways into supervisory and management roles and whether existing training adequately prepares workers for these responsibilities. The findings will identify opportunities to strengthen leadership capability and career progression across the sector.

Completed

Project title	Project description
Identifying Training Solutions Relating to Drink Spiking and Alcohol-Related Violence	SaCSA examined the education and training needs associated with drink spiking and alcohol-related violence through a national, collaborative approach involving government, industry and workers. The project identified options for a training response that could operate across differing state and territory regulatory environments.
Qualification Reform	This project reviewed qualifications across SaCSA's sectors to support simpler, more flexible and purpose-led qualification design. The work supports efforts to reduce duplication, improve skill transferability and identify qualifications that may require future reform, including those with low or no enrolments.
RSA Language Review	SaCSA reviewed SITHFAB021 Provide Responsible Service of Alcohol to ensure its language is inclusive, fit for purpose and met legislative requirements. The project also identified best practice to inform the development of future training products.
Unit Currency Audit	This audit reviewed qualifications across SaCSA's service industries to identify and address superseded or deleted units of competency that remained in current qualifications. Following analysis and industry consultation, SaCSA identified suitable replacement units and updated affected qualifications to ensure training products remain current and fit for purpose.

Looking ahead in hospitality

Australia's hospitality sector is projected to continue growing over the coming decade, but meeting future workforce demand will require more than increasing the number of people entering the sector. The evidence in this Workforce Plan points to a broader challenge: strengthening workforce supply while improving the pathways, capability and conditions that enable people to build longer-term careers in hospitality.

The future workforce pipeline will be particularly important. Declining apprenticeship and traineeship commencements and lower enrolments in key cookery qualifications raise concerns about future supply, while stakeholders have identified weaknesses in the connections between school-based training, practical workplace experience, employment and further training. Migration will remain an important source of workforce supply where domestic supply is insufficient, although policy settings will continue to influence the availability of temporary and migrant workers.

Retention and progression will be equally important. Hospitality already attracts large numbers of workers, but high workforce mobility and uneven occupational retention limit the sector's ability to retain experience and develop its future leadership pipeline. Stakeholder feedback highlights the need for clearer career pathways and more accessible development opportunities, particularly for emerging supervisors and managers and for smaller businesses that may have less capacity to provide structured internal development.

Regional workforce pressures will require particular attention. Stakeholders report that difficulties accessing workers and training can be compounded by housing, transport, seasonal demand and limited local workforce development opportunities. These factors reinforce the need for responses that recognise the different workforce conditions facing employers across locations, rather than relying on national trends alone.

Technology will add another dimension to workforce capability. AI, automation and digital systems are expected to reshape tasks and ways of working, but current evidence suggests that hospitality will continue to depend heavily on human interaction, practical expertise and judgement. Stakeholders have emphasised the continuing importance of communication and service capability, while also raising concerns that excessive reliance on automation could reduce opportunities for less experienced workers to develop practical and interpersonal skills. Workforce and training responses will therefore need to support technology adoption without weakening the core capabilities that underpin quality hospitality work.

SaCSA will continue to translate this evidence into practical and coordinated responses through workforce research, training and career pathway development, and initiatives including the National Chef Workforce Action Plan. Sustained collaboration with industry, governments, unions, training providers and other stakeholders will be critical to ensuring these responses remain grounded in workforce needs and can adapt as those needs change.

The longer-term opportunity is to build a hospitality sector with stronger entry and progression pathways, greater capacity to retain and develop workers, and a workforce with the skills and capability to respond to changing demand, technology and operating conditions.

Appendix A

Defining the scope of the tourism, travel and hospitality sector

SaCSA's occupational scope is based on Jobs and Skills Australia (JSA) mapping, which aligns primary occupations under the Australian and New Zealand Standard Classification of Occupations (ANZSCO) with relevant industries under the Australian and New Zealand Standard Industrial Classification (ANZSIC) and SaCSA's training package remit, as defined by the Department of Employment and Workplace Relations.

Refer to Table 7 and Table 8 for occupations within SaCSA's tourism, travel and hospitality scope.

Table 7: Tourism and travel occupations in SaCSA's Scope

6-digit ANZSCO code	Occupation	Directly linked to a SIT – tourism, travel and hospitality qualification?
142116	Travel agency manager	part of broader tourism and travel sector remit
149311	Conference and event organiser	yes
451412	Tour guide	yes
451600	Tourism and travel advisers nfd	yes
451611	Tourist information officer	yes
451612	Travel consultant	yes

Table 8: Hospitality Occupations in SaCSA's Scope

6-digit ANZSCO code	Occupation	Directly linked to a SIT – tourism, travel and hospitality qualification?
141000	Accommodation and hospitality managers nfd	yes
141111	Café or restaurant manager	yes
141211	Caravan park and camping ground manager	yes
141311	Hotel or motel manager	yes
141411	Licensed club manager	yes
141900	Other accommodation and hospitality managers nfd	yes
141911	Bed and breakfast operator	yes
141912	Retirement village manager	yes
141999	Accommodation and hospitality managers nec	yes
142113	Betting agency manager	part of broader hospitality sector remit
149111	Amusement centre manager	part of broader hospitality sector remit
351112	Pastrycook	yes
351311	Chef	yes
351411	Cook	yes
431000	Hospitality workers nfd	yes
431100	Bar attendants and baristas nfd	yes
431111	Bar attendant	yes
431112	Barista	yes
431211	Café worker	yes
431311	Gaming worker	yes
431411	Hotel service manager	yes
431511	Waiter	yes
431900	Other hospitality workers nfd	yes
431911	Bar useful or busser	yes
431912	Doorperson or luggage porter	yes
431999	Hospitality workers nec	yes

Table 8 (continued)

6-digit ANZSCO code	Occupation	Directly linked to a SIT – tourism, travel and hospitality qualification?
542113	Hotel or motel receptionist	part of broader hospitality sector remit
561100	Betting clerks nfd	part of broader hospitality sector remit
561111	Betting agency counter clerk	part of broader hospitality sector remit
561112	Bookmaker's clerk	part of broader hospitality sector remit
561113	Telephone betting clerk	part of broader hospitality sector remit
561199	Betting clerks nec	part of broader hospitality sector remit
621711	Cash van salesperson	part of broader hospitality sector remit
811400	Housekeepers nfd	part of broader hospitality sector remit
811411	Commercial housekeeper	part of broader hospitality sector remit
811412	Domestic housekeeper	part of broader hospitality sector remit
811411	Commercial housekeeper	part of broader hospitality sector remit
851111	Fast food cook	yes
851200	Food trades assistants nfd	part of broader hospitality sector remit
851299	Food trades assistants nec	part of broader hospitality sector remit
851311	Kitchenhand	yes
899111	Caretaker	yes

Note 1: Nfd (not further defined) – Refers to occupation categories used when the ABS cannot precisely classify an occupation at the 6-digit level. Instead, a broader occupation group code is created. The abbreviation is similarly applied for industries where the ABS cannot precisely classify an industry at the 4-digit level.

Note 2: Nec (not elsewhere classified) – Refers to occupation categories used by the ABS for occupations that can be identified but are too small or uncommon to have their own dedicated classification. These smaller occupations are combined into a single category.

Appendix B1

GenAI exposure scores across hospitality occupations

Table 9: GenAI exposure scores across SaCSA's hospitality occupations (4-digit ANZSCO)

4-digit ANZSCO code	Occupation (4-digit ANZCO)	Augmentation exposure	Automation exposure
1491	Amusement, Fitness and Sports Centre Managers	73%	44%
1414	Licensed Club Managers	70%	42%
1419	Other Accommodation and Hospitality Managers	70%	30%
1411	Café and Restaurant Managers	69%	43%
1413	Hotel and Motel Managers	69%	46%
4314	Hotel Service Managers	69%	43%
5611	Betting Clerks	69%	71%
5421	Receptionists	67%	66%
1412	Caravan Park and Camping Ground Managers	65%	43%
3513	Chefs	65%	31%
3514	Cooks	61%	22%
6217	Street Vendors and Related Salespersons	61%	42%

Table 9 (continued)

4-digit ANZSCO code	Occupation (4-digit ANZCO)	Augmentation exposure	Automation exposure
8991	Caretakers	60%	43%
8511	Fast Food Cooks	56%	27%
4313	Gaming Workers	55%	33%
3511	Bakers and Pastrycooks	54%	23%
8513	Kitchenhands	53%	22%
4311	Bar Attendants and Baristas	49%	24%
8114	Housekeepers	49%	17%
4312	Café Workers	46%	23%
4315	Waiters	44%	28%
4319	Other Hospitality Workers	43%	29%
8512	Food Trades Assistants	40%	22%

Source: SaCSA analysis of JSA, Gen AI Capacity Study Bespoke Tables 3 and 4, 2025. Scores of 70% or above are classified as high, 50–69% as medium, below 50% as low and below 25% as very low.[198]

Note: Exposure scores measure the potential for tasks to be augmented or automated and does not represent the proportion of jobs expected to disappear.

Appendix B2

GenAI exposure scores across SIT – tourism, travel and hospitality training package qualifications

Table 10: GenAI VET exposure based on related occupations

Program ID	Program name	Augmentation exposure	Automation exposure
SIT10122	Certificate I in Tourism (Australian Indigenous Culture)	44%	28%
SIT20122	Certificate II in Tourism	58%	35%
SIT30122	Certificate III in Tourism	59%	40%
SIT30222	Certificate III in Travel	67%	53%
SIT30322	Certificate III in Guiding	63%	50%
SIT30522	Certificate III in Events	60%	41%
SIT40122	Certificate IV in Travel and Tourism	69%	57%
SIT40222	Certificate IV in Guiding	63%	45%
SIT50122	Diploma of Travel and Tourism Management	60%	41%
SIT50322	Diploma of Event Management	64%	45%
SIT60122	Advanced Diploma of Travel and Tourism Management	58%	36%
SIT60222	Advanced Diploma of Event Management	65%	49%
SIT10222	Certificate I in Hospitality	57%	34%
SIT20322	Certificate II in Hospitality	57%	34%
SIT20421	Certificate II in Cookery	58%	33%
SIT30622	Certificate III in Hospitality	57%	34%
SIT30722	Certificate III in Hospitality (Restaurant Front of House)	51%	31%
SIT30821	Certificate III in Commercial Cookery	62%	30%
SIT30921	Certificate III in Catering	58%	27%
SIT31021	Certificate III in Patisserie	58%	28%
SIT31121	Certificate III in Asian Cookery	61%	30%
SIT40422	Certificate IV in Hospitality	59%	36%
SIT40521	Certificate IV in Kitchen Management	62%	30%
SIT40721	Certificate IV in Patisserie	59%	29%
SIT40821	Certificate IV in Asian Cookery	65%	31%
SIT50422	Diploma of Hospitality Management	62%	32%
SIT60322	Advanced Diploma of Hospitality Management	61%	31%

Source: SaCSA analysis of JSA, Gen AI Capacity Study Bespoke Table 16, 2025. Scores of 70% or above are classified as high, 50–69% as medium, below 50% as low and below 25% as very low.

Note: Exposure scores measure the potential for tasks in related occupations to be augmented or automated and does not represent the proportion of jobs expected to disappear.

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