

DESTINATION PHILLIP ISLAND



Destination Phillip Island
Phillip Island and San Remo Visitor Economy Workforce Plan
December 2022

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Executive Summary

A scenic coastal landscape featuring a wooden boardwalk leading up a grassy cliffside towards the ocean. Two people are walking on the boardwalk. The sky is blue with scattered clouds.

1. Executive Summary

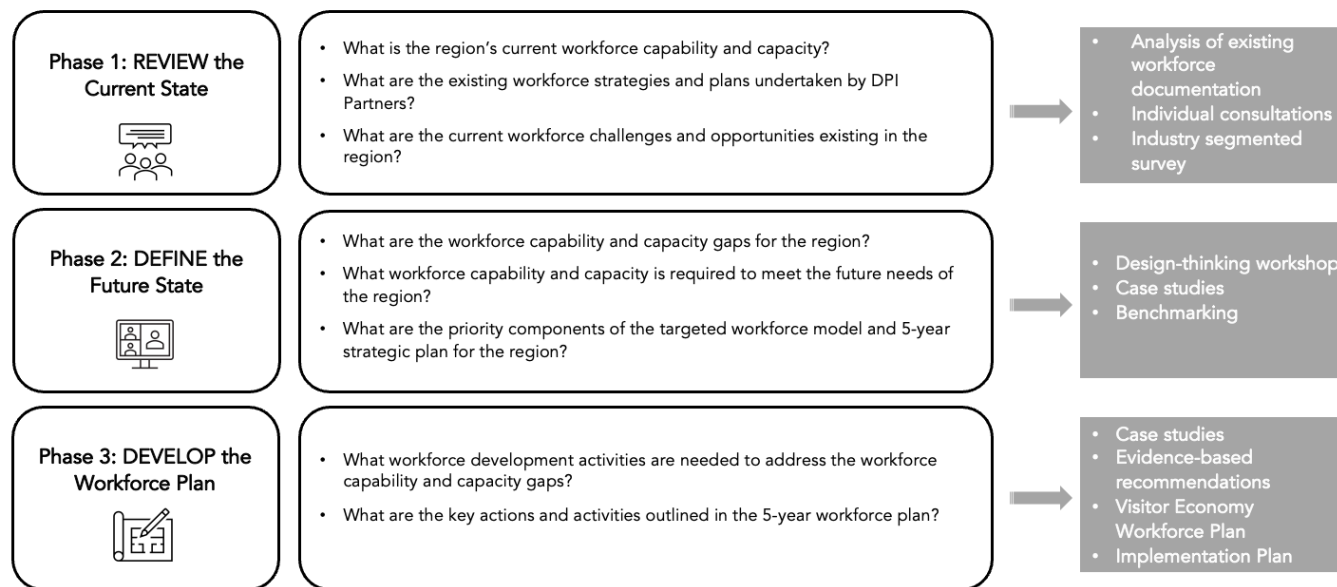
Destination Phillip Island is required to design a workforce strategy to attract and retain a workforce whose capabilities meet the needs of an evolving Phillip Island and San Remo visitor economy, whilst maximising the opportunities of their changing community economy

Background & Challenge

Destination Phillip Island Regional Tourism Board is the peak tourism organisation for the Bass Coast region. Destination Phillip Island (DPI) partners with several hundred local businesses to promote the development of sustainable tourism, supporting infrastructure and services.

In partnership with the Department of Jobs, Precincts & Regions - this workforce plan has been funded to support the region's visitor economy workforce. The Tourism Events and Strategy Reform branch are striving to support regions across Victoria to establish workforce plans to grow and support the Visitor Economy. The COVID-19 pandemic, changes in international relationships, knock-on effects affecting national trade and domestic household disposable income has resulted in a significant reduction in Victoria's Visitor Economy. As a result of both organic and inorganic changes impacting Phillip Island, their tourism industry is requiring a targeted Workforce Plan for the Bass Coast region in order to stimulate and meet the needs of the fast-changing visitor economy.

Project Methodology



1. Executive Summary

The Current State Analysis involves capturing relevant inputs from survey results and consultation findings to define prioritised challenges for the visitor economy in the Phillip Island and San Remo region, following the in-depth analysis

Current State Analysis



WORKFORCE ATTRACTION

- Having to carry staff throughout the year during off peak in order to secure staff for peak periods. There is difficulty attracting peak period surge workforce, having to tailor job design and hours to maximise attraction impact.
- There is difficulty attracting local workforce due to high demand of jobs and increasing house price in the region. There is a lack of applicants who are fit to the job role meeting the skills required.
- Having to increase remuneration and employee benefits in order to attract quality skilled applicants. There is an increased competition with remote work employers from Melbourne.



WORKFORCE RECRUITMENT

- There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff.
- There is difficulty matching the skills required for the role with a decreasing number of eligible labour force within the region. There is an increasing number of applicants who have no intention of working.
- There is difficulty recruiting peak period surge workforce due to low availability of rentals for the region. Having to utilise employee database to recruit an ex-employee for the peak season.






WORKFORCE RETENTION

- There is an increasing number of staff retired due to ageing population of the region. Having to increase remuneration and employee benefits in order to retain quality skilled workforce. There is a growing need for organisations to carry all staff throughout the non-peak season to ensure staff in the peak season.
- There is a high turnover rate for casual workforce due to the young age demographic and low availability of long-term rental. Having to develop career progression programs in order to retain staff. Having to carry all staff throughout the non-peak season to ensure staff in the peak season.
- There is a strong competition for skilled staff between local providers and remote work employers from Melbourne. Having to tailor job design and develop career progression programs in order to retain quality skilled workforce. Having to provide short-term accommodation to retain staff.

1. Executive Summary

The Current State Analysis involves capturing relevant inputs from survey results and consultation findings to define prioritised challenges for the visitor economy in the Phillip Island and San Remo region, following the in-depth analysis

Current State Analysis

 SKILLS & TRAINING	 MIGRATION	 HOUSING
<ul style="list-style-type: none">• There are skills deficiencies and inadequate training options due to lack of education providers in the region.• Staff are disengaged and less motivated to complete online delivery of education and training.• Lack of engagement and impact for career progression trainings due to older age demographic of labour workforce.• There are skills deficiencies and inadequate training options due to lack of education providers in the region. Past trainings focused on qualifications rather than skills.	<ul style="list-style-type: none">• There is a high demand for recruiting international workers in Hospitality & Tourism services.• Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation).	<ul style="list-style-type: none">• The prevalence of short-term accommodation increased the competition for private rental market, making it difficult for staff to find permanent accommodations.• Increasing rents in the region made it difficult for accommodation providers to attract and retain staff due to low availability of long-term rentals.

1. Executive Summary

The Future State Analysis involves a detailed evaluation of emerging challenges and opportunities that exist in visitor economy industries, namely Accommodation, Attraction, and Food & Beverage

Future State Analysis



ACCOMMODATION

- Workforce supply and workforce quality issues in the Phillip Island and San Remo region are likely for the foreseeable future.
- New developments in the region and strong competition for labour in the accommodation sector will present significant workforce challenges.
- The projected demand for visitors will continue to drive government and industry leaders to undertake new developments to expand accommodation sector in the region.
- Perceived working conditions of the tourism sector will continue presenting workforce challenges for the industry providers.



ATTRACTION

- The opening of larger developments and competition for labour in the region will present.
- The growth of labour supply and skills & training will be impacted by the lack of uniform and coordinated career plans and pathways for attraction and recreational industry.
- Larger businesses in the industry will require a different workforce profile with more skilled workers to deliver managerial type of work.
- Perceived working conditions of the tourism sector will continue presenting workforce challenges for the industry providers.



FOOD & BEVERAGE

- The opening of larger developments and competition for labour in the region will present workforce challenges.
- Existing visa policies and requirements will continue to present significant constraints for local small businesses to sponsor international workers.
- With an increasing focus on sustainability and climate change, younger generation of workers and consumers will continue to support business practices and workforce that aligns with these values.

1. Executive Summary

The Future State Analysis utilises a detailed evaluation of the visitor economy's future state against the six priority areas from NMC Regional Workforce Development Model

Future State Analysis



WORKFORCE ATTRACTION

- The opening of larger developments and competition for labour in the region will present workforce opportunities and challenges.
- Tourism industry will continue to experience difficulties recruiting peak season workforce to facilitate the increasing demand for labour.
- The visitor economy is expected to generate significant number of employment in the region, increasing the demand for Hospitality and Tourism workforce.



WORKFORCE RECRUITMENT

- The opening of larger developments and competition for labour in the region will present workforce opportunities and challenges.
- Tourism industry will continue to experience difficulties recruiting peak season workforce to facilitate the increasing demand for labour.
- The visitor economy is expected to generate significant number of employment in the region, increasing the demand for Hospitality and Tourism workforce.



WORKFORCE RETENTION

- The ageing population will impose significant workforce challenges, retaining skilled workforce in the tourism industry.
- Younger workforce will be less likely to remain in the tourism industry with the lack of career progression programs and perceived working conditions of Hospitality and Tourism roles.
- With an increasing focus on sustainability and climate change, younger generation of workers and consumers will continue to support business practices and workforce that aligns with these values.

1. Executive Summary

The Future State Analysis utilises a detailed evaluation of the visitor economy's future state against the six priority areas from NMC Regional Workforce Development Model

Future State Analysis



SKILLS & TRAINING

- Staff are disengaged and less motivated to complete online delivery of education and training.
- Lack of engagement and impact for career progression trainings due to older age demographic of labour workforce.
- There are skills deficiencies and inadequate training options due to lack of education providers in the region. Past trainings focused on qualifications rather than skills.



MIGRATION

- There is a high demand for recruiting international workers in Hospitality & Tourism services.
- Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation).



HOUSING

- The prevalence of short-term accommodation increased the competition for private rental market, making it difficult for staff to find permanent accommodations.
- Increasing rents in the region made it difficult for accommodation providers to attract and retain staff due to low availability of long-term rentals.

1. Executive Summary

The Future State Analysis involves the development of five-year goals broken into specific actions to address and mitigate existing workforce challenges for the future state of the visitor economy in the Phillip Island and San Remo region

Workforce Goals

Unique Value Proposition	Create a unique value proposition for the tourism sector for the Phillip Island and San Remo region to attract, recruit and retain staff.
Centralised Workforce System	Develop a centralised workforce system to be utilised collaboratively across the Phillip Island and San Remo tourism sector to promote, recruit and retain workforce.
Local Community	Engage with the local Phillip Island and San Remo community and promote tourism employment and careers.
Sustainable Workforce Environment	Develop a sustainable workforce environment to meet the fast-changing demands of the Phillip Island and San Remo tourism sector.

Workforce Actions

- Create a membership system for the tourism sector providers in the Phillip Island and San Remo region.
- Create a coordinated recruitment platform for the region, allowing industry providers to attract and recruit candidates that match the skills required.
- Develop a marketing and communications strategy to promote the Phillip Island and San Remo region as a lifestyle destination.
- Turning casual jobs in the Phillip Island and San Remo region into careers in the Hospitality and Tourism industry.
- Centralise education providers for skills and training in the region, aligning the purpose of training with a selection of providers.
- Engage with local community groups through partnerships with sport clubs, local schools, social media groups.
- Engage with the elderly and retired communities in the region for workforce attraction and recruitment.
- Advocate for accessible public transport within the region to create better transport opportunities for employees.
- Advocate for short-term accommodation for Hospitality and Tourism workforce to attract, recruit and retain workforce.

1. Executive Summary

The evaluation of the future state goals enables Destination Phillip Island to prioritise actions and activities that are pivotal in reaching future state in line with the fast-changing demands of the visitor economy and thereby, supporting industry partners in the region

Strategic Actions	Attraction	Recruitment	Retention	Skills & Training	Migration	Housing
1. Create a membership system for the tourism sector providers in the Phillip Island and San Remo region.						
2. Create a coordinated recruitment platform for the region, allowing industry providers to attract and recruit candidates that match the skills required.						
3. Develop a marketing and communications strategy to promote the Phillip Island and San Remo region as a lifestyle destination.						
4. Turning casual jobs in the Phillip Island and San Remo region into careers in Hospitality and Tourism industry.						
5. Centralise education providers for skills and training in the region, aligning the purpose of training with a selection of providers.						

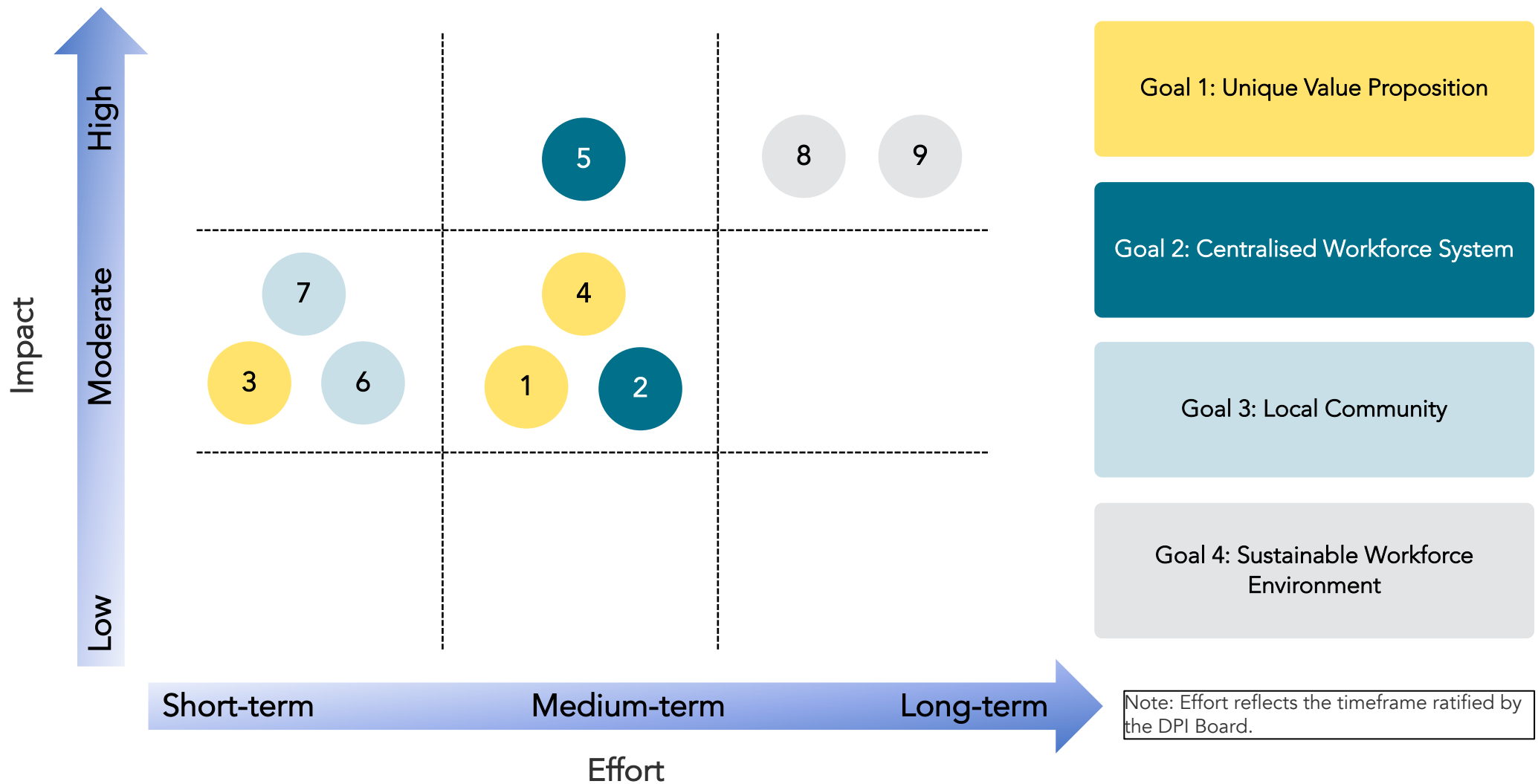
1. Executive Summary

The evaluation of the future state goals enables Destination Phillip Island to prioritise actions and activities that are pivotal in reaching future state in line with the fast-changing demands of the visitor economy and thereby, supporting industry partners in the region

Strategic Actions	Attraction	Recruitment	Retention	Skills & Training	Migration	Housing
6. Engage with local community groups through partnerships with sport clubs, local schools, social media groups.						
7. Engage with the elderly and retired communities from the region for workforce attraction and recruitment.						
8. Advocate for an accessible public transport within the region to create better transport opportunities for employees.						
9. Advocate for a short-term accommodation for Hospitality and Tourism workforce to attract, recruit and retain workforce.						

1. Executive Summary

The proposed workforce initiatives are presented with a high-level assessment of impact and effort matrix. This assessment identifies actions that are suited for immediate consideration to better support the visitor economy workforce in the region



Situation & Challenge

stars 



2.1 Background

How can Destination Phillip Island design a workforce strategy to attract and retain a workforce whose capabilities meet the needs of an evolving Phillip Island and San Remo visitor economy, whilst maximising the opportunities of their changing community economy?



Background

Destination Phillip Island Regional Tourism Board is the peak tourism organisation for the Bass Coast region. As of December 2019, the Phillip Island/Bass Coast region attracted over 2.6 million visitors annually, growing at 8% each year. Destination Phillip Island (DPI) partners with several hundred local businesses to promote the development of sustainable tourism, supporting infrastructure and services.

Led by a skills-based Board, DPI is focused on the development and growth of the tourism industry in the region, strategic tourism development and advocacy for the region through various operations that include regional marketing, identification of investment/infrastructure opportunities and product development. Additionally, to ensure alignment of the strategic direction of the tourism industry for the entire Phillip Island region, the organisation facilitates communication with key partners such as Local Government, Visit Victoria, Tourism Australia and other relevant bodies. In partnership with the Department of Jobs, Precincts & Regions - this workforce plan has been funded to support the region's visitor economy workforce. The Tourism Events and Strategy Reform branch are striving to support regions across Victoria to establish workforce plans to grow and support the Visitor Economy.

The COVID-19 pandemic, changes in international relationships, knock-on effects affecting national trade and domestic household disposable income has resulted in a significant reduction in Victoria's Visitor Economy. This exhibited flow-on effects to the levels and expenditure of tourism in the Bass Coast Region.



Pictured: the Phillip Island and San Remo region Map

2.1 Background (contd.)

How can Destination Phillip Island design a workforce strategy to attract and retain a workforce whose capabilities meet the needs of an evolving Phillip Island and San Remo visitor economy, whilst maximising the opportunities of their changing community economy?



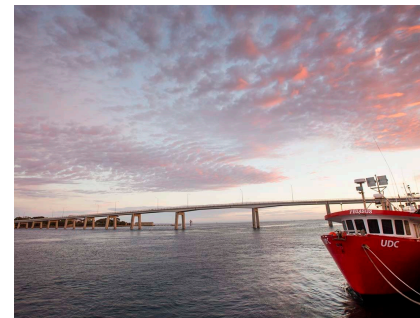
Phillip Island & San Remo

Across a 101 square kilometre region and only a 90 min drive from Metropolitan Melbourne, Phillip Island is famous for its 'Penguin Parade', the legendary Australian Motorcycle Grand Prix and the region's natural beauty.

Phillip Island is part of the homelands of the Yallock Bulluk people of the Bunurong/Boonwurring clan for many thousands of years before white exploration of the area began.

This Island sanctuary of abundant wildlife, breathtaking coastlines, picturesque Western Port and a rugged surf coast has attracted residents and visitors alike.

The tourism industry started with the opening of its first hotel, the Isle of Wight, in 1870 and nearby Phillip Island Hotel soon after. The first regular ferry service began in 1878 making access much easier for visitors. Motor racing, both car and bike, began in 1928 with the circuit around the Island's dirt roads. The Australian Grand Prix for cars was held for a number of years and major reconstruction work was done to the track and its buildings to stage the 1989 Motorcycle Grand Prix and it has operated continuously since then. The present San Remo bridge was opened in 1969, allowing increased development for regional tourism in Phillip Island and neighbouring Bass Coast townships.



Pictured: Key Attractions in the Phillip Island and San Remo region

2.2 Challenge

How can Destination Phillip Island design a workforce strategy to attract and retain a workforce whose capabilities meet the needs of an evolving Phillip Island and San Remo visitor economy, whilst maximising the opportunities of their changing community economy?



Challenge

As a result of both organic and inorganic changes impacting Phillip Island, their tourism industry is requiring a targeted Workforce Plan for the Bass Coast region in order to stimulate and meet the needs of the fast-changing visitor economy. DPI's workforce delivery model is especially important, given that they are the leading tourism organisation for the Bass Coast region.

With the impact of the pandemic and current external challenges facing Phillip Island, the visitor economy is experiencing increased pressure to adapt and deliver through a new delivery model; a challenge that continually evolves post pandemic. The visitor economy and demographic is changing as a result of regional partnerships and new investment opportunities, which include the development of hot springs, new infrastructure, evolving off-season demand and cruise ships.

Across their **workforce**, Phillip Island is experiencing region-specific challenges, including:

- An aging population, who do not participate in the labour economy
- Difficulty in matching skill-based roles required with skills available in the region's workforce
- Significant increase of house prices in the region
- Lack of availability of affordable and rental housing in the region
- Distance and availability to nearby regions where there is available housing
- Lack of access to childcare services



Pictured: Phillip Island Tourism Conference September 2022

2.3 Purpose & Outcome

How can Destination Phillip Island design a workforce strategy to attract and retain a workforce whose capabilities meet the needs of an evolving Phillip Island and San Remo visitor economy, whilst maximising the opportunities of their changing community economy?



Purpose

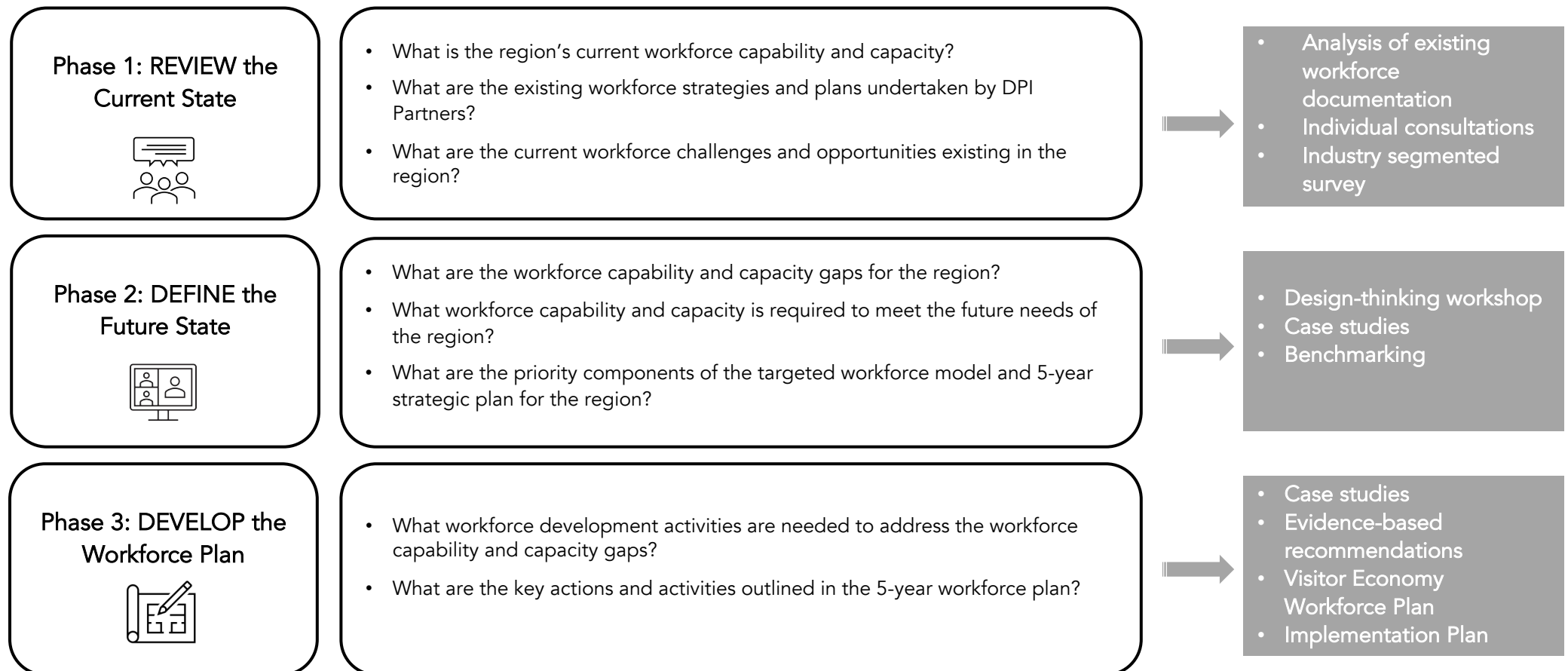
The intended output of this initiative is to design a targeted workforce strategy and 5-year action plan to meet the demands of a fast changing and growing visitor economy of the Phillip Island and San Remo region.

By identifying and analysing the challenges and opportunities for workforce attraction and retention in Phillip Island and San Remo, the strategic plan will provide achievable actions for the short, medium and long-term, ensuring the 5-year workforce plan reflects the needs of the Phillip Island and San Remo community.



2.4 Project Approach

NMC undertook a three-phased approach to review, define and develop a visitor economy workforce plan for the Phillip Island and San Remo region



2.5 Project Priority Areas

By prioritising six focus areas for the workforce development, comprehensive analysis and forecasting can be made as critical input into the tourism workforce capability and capacity design for the Phillip Island and San Remo region






NMC identified six workforce development priority areas for a comprehensive analysis. Note, NMC assumes an overlap between the six priority areas, with some lenses weighing higher on their level of significance.

2.6 Industry Segmentation

Segmenting the Phillip Island and San Remo visitor economy industry by sector and size of the organisations enables targeted analysis and solution design to increase the potential impact of the Workforce Strategy

Industry Segmentation

In order to facilitate targeted analysis and solution design, the project has identified Accommodation, Attraction, and Food & Beverage as the primary sectors in the tourism sector. Each segment can be further categorised as small, medium, and large sized organisations to understand the industry environment, current and future workforce plans.

	 ACCOMMODATION	 ATTRACTION	 FOOD & BEVERAGE
LARGE	<ul style="list-style-type: none"> Hotels, guest houses, bed and breakfast, caravan parks and any other type of accommodation service provider that employs minimum of 100 staff and generates over \$1 million revenue on annual basis 	<ul style="list-style-type: none"> National parks, theme parks, entertainment centres and any other type of attraction service provider that employs minimum of 100 staff and generates over \$1 million revenue on annual basis 	<ul style="list-style-type: none"> Restaurants, cafés, pubs, taverns and any other food & beverage service provider that employs minimum of 100 staff and generates over \$1 million revenue on annual basis
MEDIUM	<ul style="list-style-type: none"> Hotels, guest houses, bed and breakfast, caravan parks and any other type of accommodation service provider that employs maximum of 50 staff and generates maximum of \$500,000 revenue on annual basis 	<ul style="list-style-type: none"> National parks, theme parks, entertainment centres and any other type of attraction service provider that employs maximum of 50 staff and generates maximum of \$500,000 revenue on annual basis 	<ul style="list-style-type: none"> Restaurants, cafés, pubs, taverns and any other food & beverage service provider that employs maximum of 50 staff and generates maximum of \$500,000 revenue on annual basis
SMALL	<ul style="list-style-type: none"> Hotels, guest houses, bed and breakfast, caravan parks and any other type of accommodation service provider that employs maximum of 20 staff and generates maximum of \$200,000 revenue on annual basis 	<ul style="list-style-type: none"> National parks, theme parks, entertainment centres and any other type of attraction service provider that employs maximum of 20 staff and generates maximum of \$200,000 revenue on annual basis 	<ul style="list-style-type: none"> Restaurants, cafés, pubs, taverns and any other food & beverage service provider that employs maximum of 20 staff and generates maximum of \$200,000 revenue on annual basis

2.7 Project Methodology

Utilising extensive consultation and data analysis across each of the priority areas and segmented industries, the nature of the workforce opportunities and challenges in Phillip Island and San Remo is identified through NMC Methodology outlined below

Phase 1



REVIEW the current state

Commenced with the development of a **Project Plan** including a **Stakeholder Engagement Plan**. Undergo analysis of existing workforce documentation including the **NOUS report, Remplan, mandates, Visitor Economy Reform Plans and Reviews, policies, impacting standards** and associated **legislation**, and **Board papers** and **minutes**.

An assessment of the **current mix of Workforce skills and expertise** and of the changing demographic undertaken, with a detailed analysis of the **key strengths and weaknesses**.

1 on 1 consultations conducted with Board members and stakeholders.

Insights collated to generate a current state assessment, an **evaluation** of the current state workforce environment. This **highlighted opportunities, gaps**, and where **activities** are required for **uplift to stimulate and meet the increasing demands of the visitor economy**.

	ACCOMMODATION	ATTRACTION	FOOD & BEVERAGE
LARGE	• Have a very high proportion of high quality accommodation in the region of Phillip Island	• Have a strong, consistent and well-developed attraction portfolio	• Have a strong and well-developed food and beverage portfolio
MEDIUM	• Have a strong and well-developed food and beverage portfolio	• Have a strong and well-developed attraction portfolio	• Have a strong and well-developed food and beverage portfolio
SMALL	• Have a strong and well-developed food and beverage portfolio	• Have a strong and well-developed attraction portfolio	• Have a strong and well-developed food and beverage portfolio

Phase 2



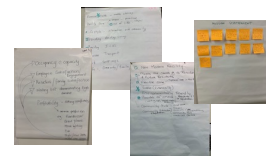
DEFINE the future state

This phase collaboratively **designed a purpose-fit future state Visitor Economy Workforce model** for the **Phillip Island and San Remo regions**.

Further on-ground research will be conducted to **develop case studies** to inform future state design.

A **design thinking workshop** session will take place to **replay** key current state insights, and facilitate innovative **collaboration and ideation**. **Guiding principles** to influence the future state design and **critical components** of the **5 year action plan** will be established.

Benchmarking, industry standards and impacting legislation, reform plan and reviews will be incorporated into the design. **Further on-ground research** will be conducted to **develop evidence-based recommendations**.



Phase 3



DEVELOP the Workforce Plan

Final drafts of **Destination Phillip Island's Visitor Economy Workforce Plan** will be **presented to the board and feedback incorporated**. This details **key reporting mechanisms** and **associated KPI's**, with the inclusion of developed **case studies** and **evidence-based recommendations**.

A final **Workforce Strategy report** with a **5 year Action Plan** with **short and long term priority actions** will be provided and include **recommendations for key regional partnerships, funding opportunities and structured upskilling plan** as well as a recommended **implementation plan** and high-level timeline. This includes a **final report** along with a **PowerPoint presentation** to internal stakeholders.





About the region



3.1 Geography

Located 120 kilometres south-east of Melbourne, Phillip Island is a scenic island part of the Bass Coast Shire, surrounded by neighbouring islands and beaches

Geography

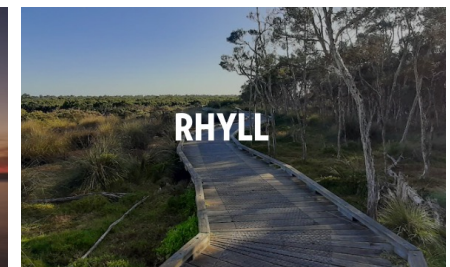
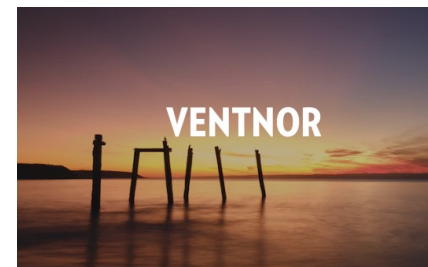
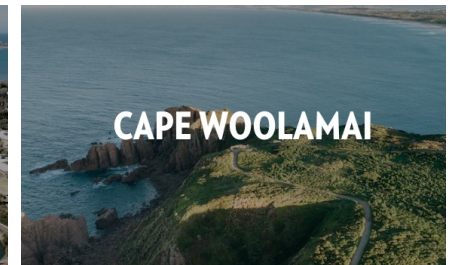
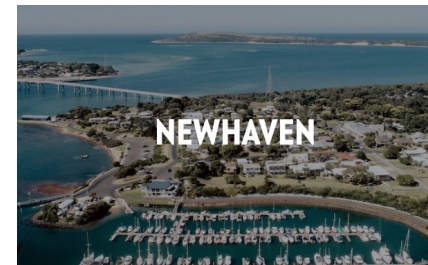
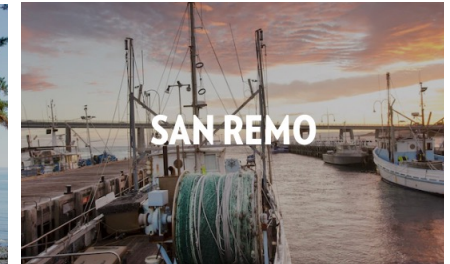
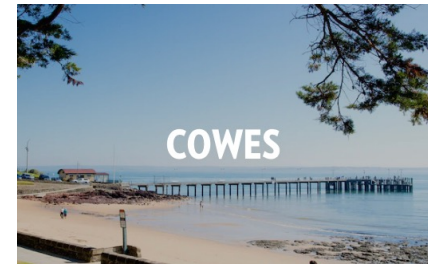
Phillip Island is a scenic island located in Victoria, Australia **120 kilometres** south-east of Melbourne and attracts millions of tourists all year around. The island is part of the **Bass Coast Shire**, and neighbouring islands include Churchill and French Island.

The island's proximity to Melbourne makes the overall climate pattern relatively similar, however, the weather is generally a bit cooler compared to Melbourne. July is the coldest month with average temperatures of 13 degrees while February records high temperatures averaging around 25 degrees Celsius.

To get from Melbourne to Phillip Island by car takes approximately 2 hours, driving through Phillip Island Road (B420) to San Remo over the bridge. Public transport options include VLine buses, departing Melbourne daily from Southern Cross Station, which take approximately 2.5 to 3 hours.

The main townships in the Phillip Island and San Remo region are Cowes, Newhaven, Cape Woolamai, Ventnor, Rhyll and San Remo. From San Remo to Cowes, it is approximately 16.5 km, taking almost 15-20 min to reach depending on the traffic.

Main townships

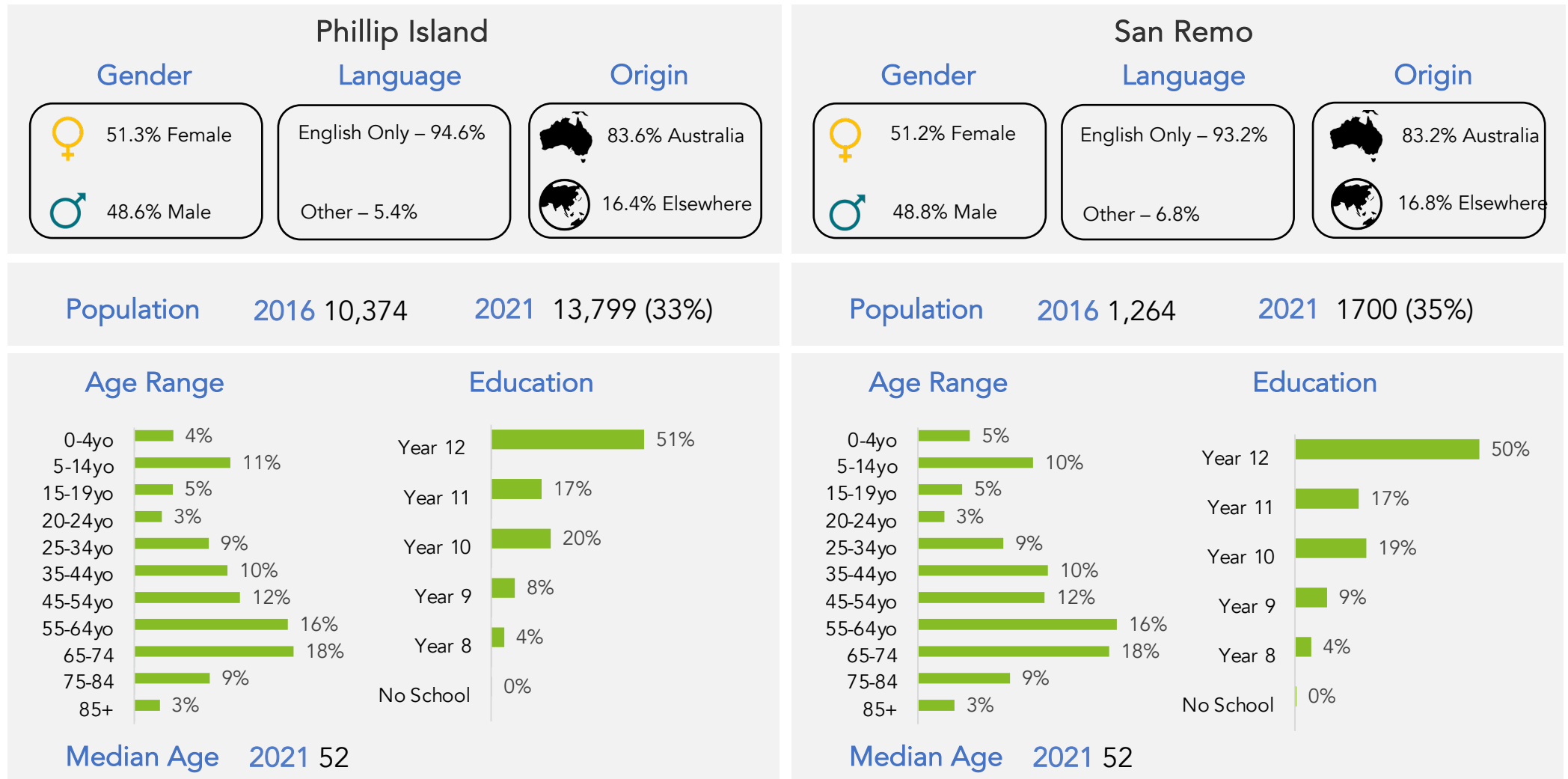




3.2 Population & Demographic Data

Census Data (2021) highlights a 33% and 35% growth of population in the Phillip Island and San Remo region respectively, exceeding the census target for population

Extrapolation from the Census Data (2021) depicts the demographic and population data across the Phillip Island and San Remo region.



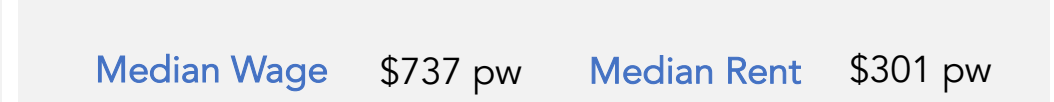
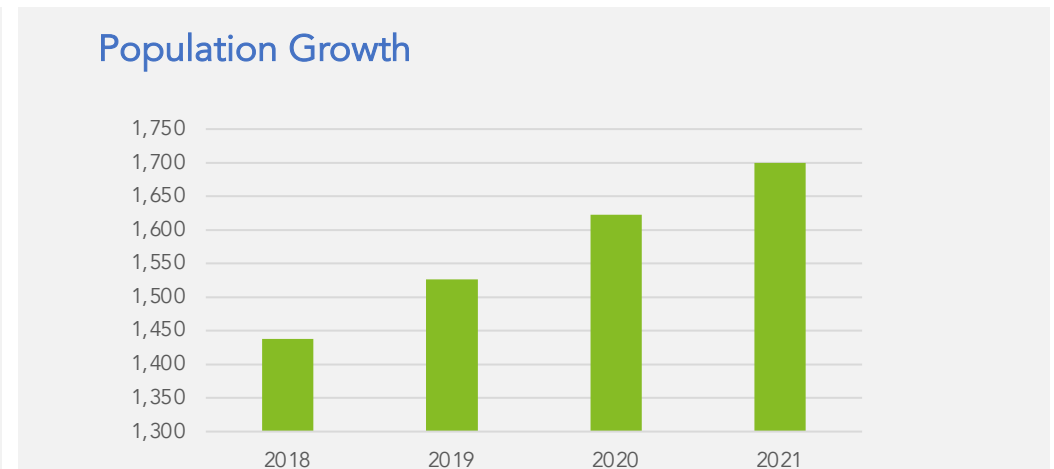
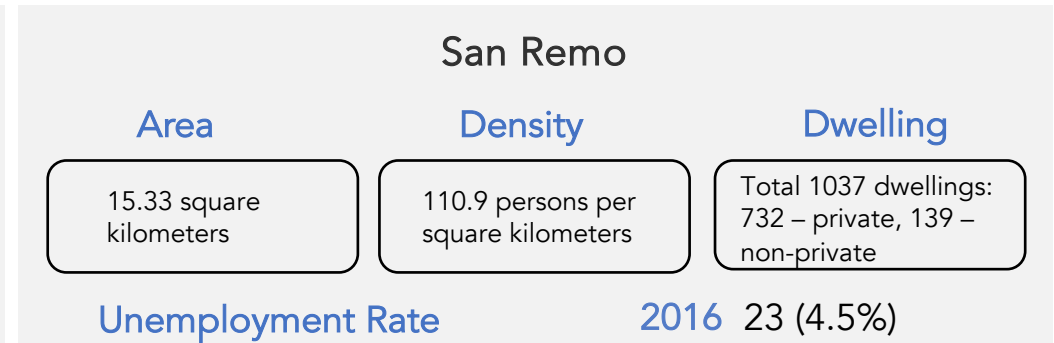
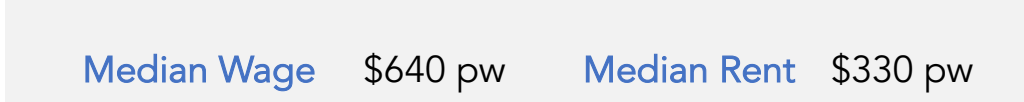
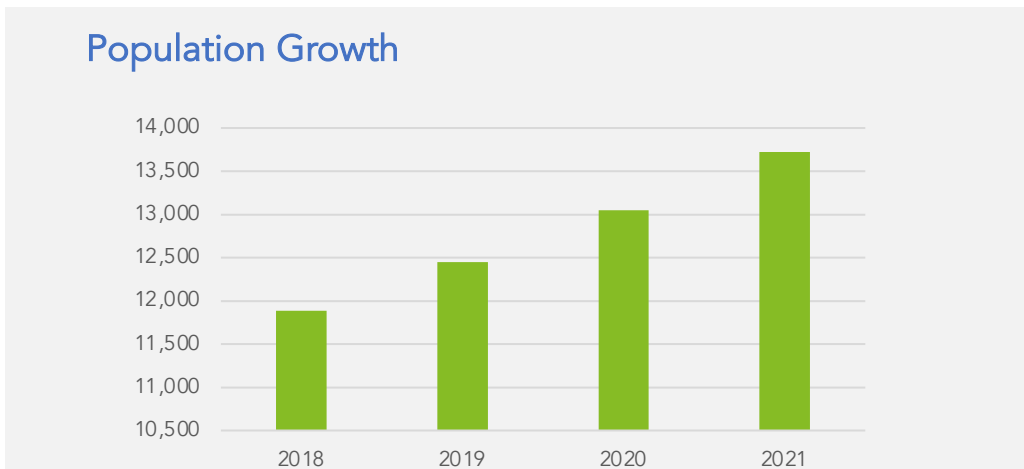
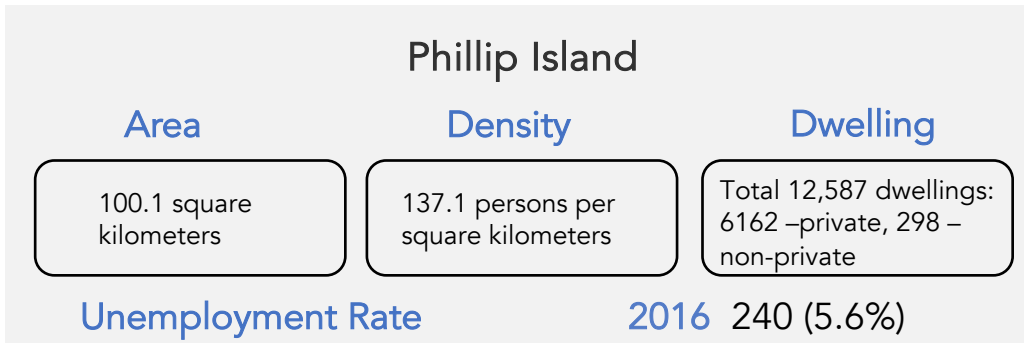
Australian Bureau of Statistics, Census Community Profiles, Phillip Island and San Remo (2021)



3.2 Population & Demographic Data (contd.)

Census Data (2021) highlights the exponential growth of population in the Phillip Island and San Remo region over the past 4 years, exceeding the census target

Extrapolation from the Census Data (2021) depicts the demographic and population data across the Phillip Island and San Remo region.



Australian Bureau of Statistics, Census Community Profiles, Phillip Island and San Remo (2021)



3.3 Infrastructure

The unparalleled population growth of the Phillip Island and San Remo region is placing increased pressure on all critical infrastructure and services, including accommodation, education and transport services

Hard Infrastructure

Popular roads in Phillip Island and San Remo do not exhibit the capability to sufficiently meet the high traffic requirements present at tourism peak seasons.



Walking Trails

The Phillip Island and San Remo regions have a plethora of popular walking trails along the coastline and a growing number of shared paths across the island.



Transport

Popular roads in Phillip Island and San Remo do not exhibit the capability to sufficiently meet the high traffic requirements present at tourism peak seasons.

The private motor vehicle is the predominate method of transport in the region with public transport options (buses) having limited frequency. A limited service passenger ferry from Cowes to Stony Point offers connections on the railway line to Frankston.

The paved Phillip Island Bike Path runs alongside Phillip Island Road from Newhaven all the way to the main town centre in Cowes.



3.3 Infrastructure (contd.)

The unparalleled population growth of the Phillip Island and San Remo regions is placing increased pressure on all critical infrastructure and services, including accommodation, education and transport services

Accommodation

There are significant challenges present in housing the tourism workforce, especially for longer visits in the Phillip Island and San Remo regions. This is due to planning overlays, escalating prices and low availability, all contributing to the difficulty in meeting the growing demand.

Furthermore, it is difficult to rent in the regions due to significantly low availability.

This is exacerbated by the rising trend of owners increasingly choosing to list their houses on Airbnb as opposed to providing them for rent, leading to challenges in obtaining long-term rentals and attracting new visitors who wish to stay for longer durations.



Health Facilities

Health services, including emergency services, are limited in Cowes.

Wonthaggi is the closest town providing a suite of health and emergency services at Wonthaggi Hospital; however, the range remains limited.

The recognised regional health service is located at Latrobe Regional Health, 2 hours from Cowes. There is only one bus service a day facilitating this trip. 40% of residents travel outside the region for their health needs.



Tourism Funding

The Regional Tourism Investment Fund and Enabling Tourism Fund are a major component of the Victorian government's Visitor Recovery and Reform Plan to aid the recovery of the state's tourism sector after the impacts of the first years of the pandemic, as well as enabling growth into the future.

In 2022 several significant Phillip Island tourism projects were awarded funding through the Regional Tourism Infrastructure and Enabling Tourism Funds. These included the Penguin Parade, the Phillip Island Hot Springs expansion of stage 2 and the Rhyll Brewery.





3.3 Infrastructure - Housing

The price of land in Cowes and greater Phillip Island will likely continue to increase over time due to increasing demand and limited supply, exacerbated by existing settlement boundaries, resulting in a growing trend of building multiple story buildings where possible

A comprehensive view of the current Cowes, Phillip Island property market was undertaken to understand pricing and uncover market trends. A view of settlement boundaries and planning scheme zones and overlays guides potential new developments.

Land Prices & Trends

- **Land prices are increasing**, there is no available new land and getting council approval is extremely difficult for re-zoning¹
- The Cowes median house price has seen 59% growth in the past 5 years to \$830,000²

Settlement Boundaries

- Cowes has stringent settlement boundaries, and it is very difficult and costly to successfully challenge the boundaries to build
- The settlement boundaries are unlikely to change³

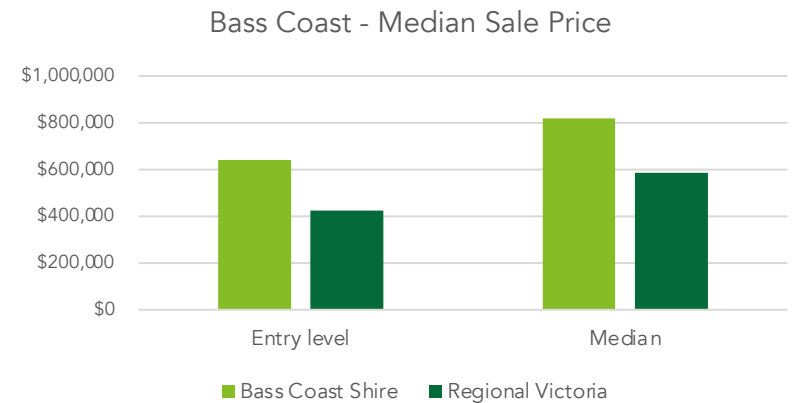
Height of Dwellings

- Dependent on the specific zoning title, typically land closer to the shoreline has height restrictions preventing building above 1-storey or 2-storeys, however 3-storeys is possible further from the shoreline
- In Cowes, the building landscape is changing, with a recent spike in developments exceeding 1 & 2 -storeys. This is likely to continue.

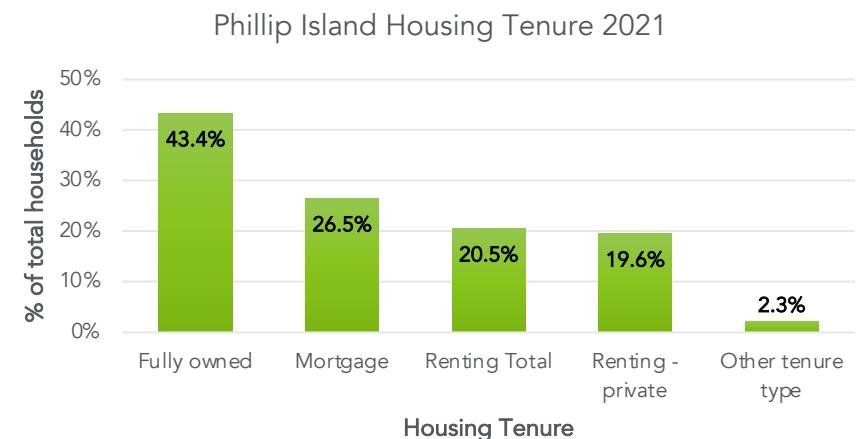
Note

1. Insight obtained as per meeting with Greg Price (Alex Scott Real Estate)
2. Source: Reiv.com.au: <https://reiv.com.au/market-insights/suburb/cowes>
3. Insight obtained as per meeting with Jodi Kennedy, Bass Coast Shire Council (Appendix C)
4. Source: Census Data (2021), Australian Bureau Statistics

Bass Coast - Median Sale Price (house)²



Housing Tenure⁴





3.4 Infrastructure - Rental

Despite the strong growth of total households and rentals, followed by 33% and 35% population growth in the Phillip Island and San Remo region, the proportion of households who rent has decreased by a small percentage from 2016 to 2021

A comprehensive view of the current Phillip Island and San Remo rental property market was undertaken to understand statistical growth and uncover trends of rental market. Extrapolation from the Census Data (2021) depicts the rental and total households' data across the Phillip Island and San Remo region.

The Growth of Total Households

- The **total households** in Phillip Island and San Remo have increased by an additional 1623 and 184 households respectively, with approximately **35.7%** and **33.9% growth**, followed by 33% and 35% increase in population in the last 5 years from 2016 to 2021, respectively¹.

The Growth of Total Rentals

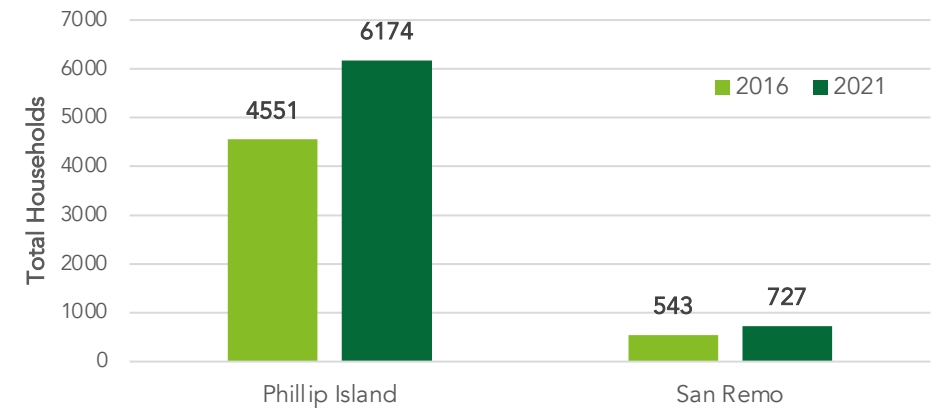
- The total rentals in Phillip Island have grown by 25.7% with additional 248 rentals in the region from 2016 to 2021¹.
- The total rentals in San Remo also followed the same trend, increasing from 141 to 159 rentals with 12.8% growth in the last 5 years from 2016 to 2021¹.

Housing Tenure

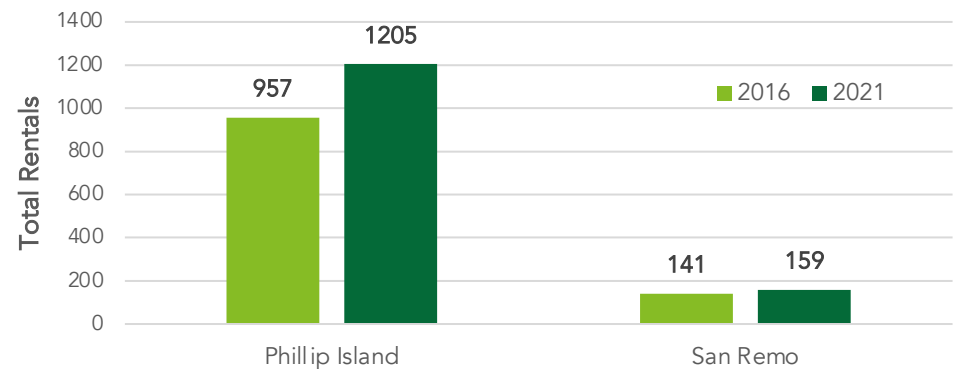
- Despite the strong growth of total households and total rentals in the Phillip Island and San Remo region, the proportion of households who rent has experienced a contrasting trend.
- The proportion of households who are renters in Phillip Island has decreased from **21% in 2016 to 19.5% in 2021**¹.
- The proportion of households who are renters in San Remo also has seen a decline from **26% in 2016 to 21.9% in 2021**¹.

Note 1. Source: Census Data (2021), Australian Bureau Statistics

Total Households in Phillip Island and San Remo



Total Rentals in Phillip Island and San Remo



Tourism





4.1 Tourism: Overview

The visitor economy in the Phillip Island and San Remo region has seen massive growth with increasing Gross Value Added and Gross Regional Product for the region

Tourism Overview

Phillip Island is one of the major tourist destinations in Victoria, offering unique wildlife experiences including the Penguin Parade, beaches, nature walks and whale watching. The region has seen massive growth in its visitor economy with fast growing Gross Regional Product. The major attractions on the island includes:

- **Phillip Island Nature Parks** manages the Penguin Parade, Churchill Island, Antarctic Journey, and Koala Conservation Reserve.
- **Phillip Island Grand Prix** circuit hosts major events, such as the Motorcycle Grand Prix and World Superbike Championships and a host of events throughout the year. Tourism activities include the include 750m Go Kart track and History of Motorsport display.
- **Phillip Island Chocolate Factory** offers tours of the chocolate making with interactive machines, fascinating facts and retail shop and café.
- **Wildlife Coast Cruises** provides seal and whale watching cruises, Cape Woolamai and bay cruises.

The peak season for tourism in Phillip Island and San Remo is between January and March. During the summer holidays, there is a high demand for accommodation, attractions and eateries.

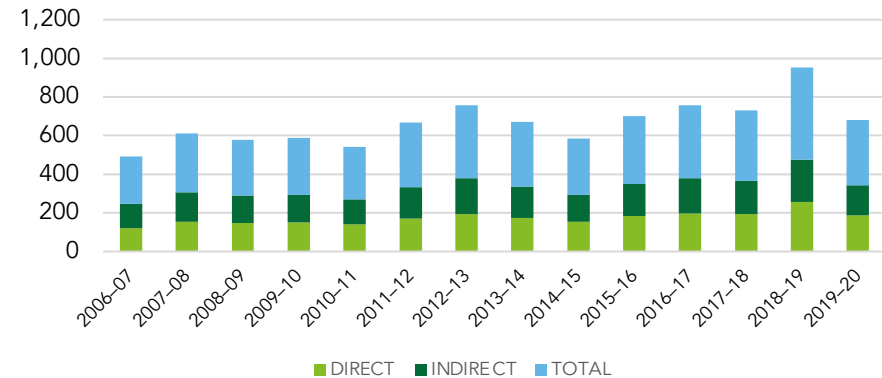
The mid-peak season is during school holidays (i.e., April, July, September). Visitors are less likely to visit Phillip Island and San Remo in August, being the off-season.

Source: Austrade, Tourism Research Australia, Phillip Island and San Remo (2019-20).

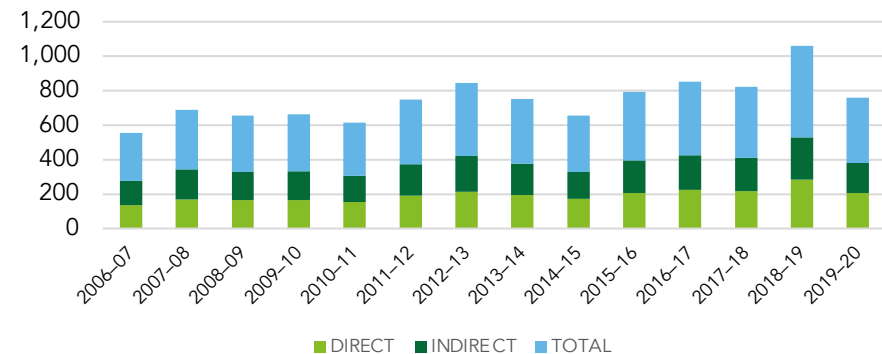
Tourism Data

Extrapolation from the Tourism Research Data (Austrade), 2019-20, depicts the visitor economy data on tourism across the Phillip Island and San Remo region.

Gross Value Added in Phillip Island



Gross Regional Product in Phillip Island





4.2 Tourism: Statistics

The Tourism Research Data from Austrade (2019-20) highlights the significant growth of tourism consumption and employment in Phillip Island over the last 10 years

Summary

Extrapolation from the Tourism Research Data from Austrade (2019-20) depicts the visitor economy data on tourism across the Phillip Island and San Remo region.

The tourism industry in the Phillip Island and San Remo region has seen tremendous growth over the last decade, contributing approximately **\$900 million** to the economy in the **pre-COVID** period from 2018-2019. Out of all products, accommodation and hospitality were the main contributors to the tourism consumption, according to the 2019-2020 data on Phillip Island and San Remo.

Despite the natural decline of the tourism industry in the Phillip Island and San Remo region, following a world-wide pandemic that resulted in **16% drop** in total expenditure by tourism in **2019-2020**, the visitor economy is gradually bouncing back to its pre-COVID state with a growing demand from domestic visitors.

Recent statistics on Victorian Tourism 2022 has shown that total expenditure by domestic visitors in Phillip Island region has surpassed its pre-COVID levels with **31% annual growth** from **2021-2022**.

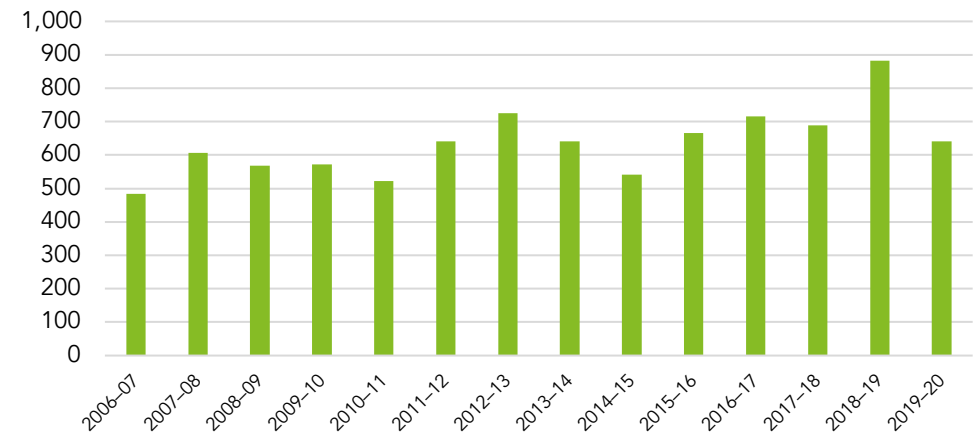
Key Attractions

Phillip Island Nature Parks has seen a major reduction in number of visitors (745,641 to 317,589) during 2020-21 period as a result of COVID-19 pandemic.

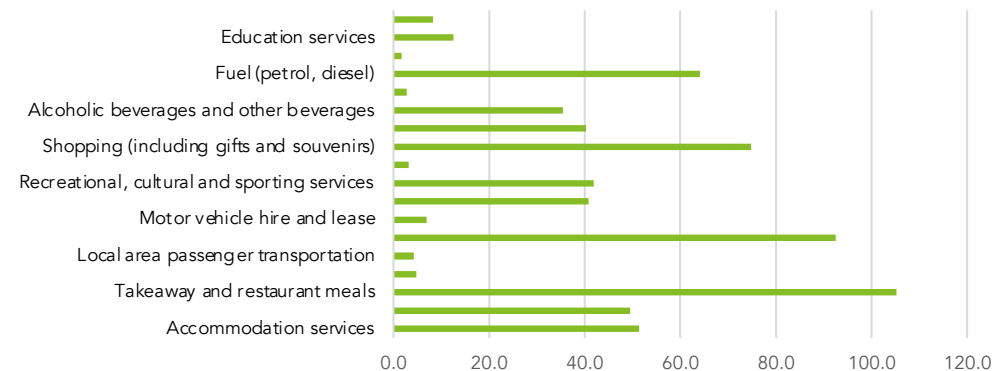
Source: Austrade, Tourism Research Australia, Phillip Island and San Remo (2019-20).

Phillip Island and San Remo Visitor Economy Workforce Plan

Tourism Consumption in Phillip Island \$m



2019-20 Tourism Consumption in Phillip Island \$m by Products





4.3 Tourism: Growth

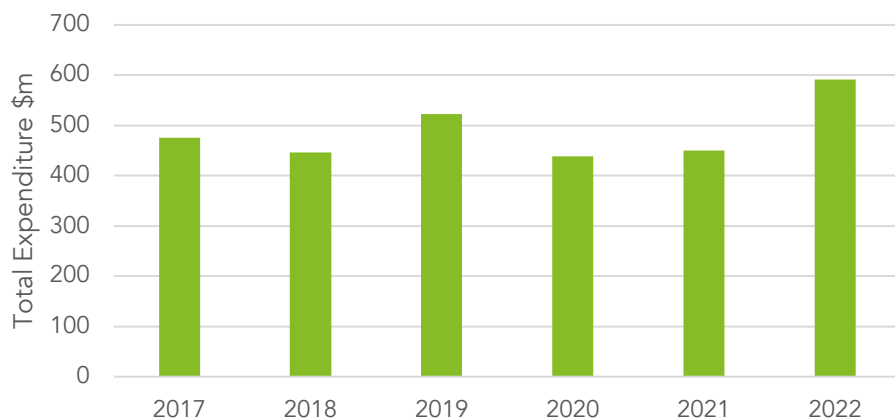
Despite its main contribution to the regional economy in the Phillip Island and San Remo region, tourism has seen significant decline during 2020-21 as a result of COVID-19, however domestic demand is driving the 2022 increase

Overview

Tourism is a critical industry for Phillip Island. Prior to the COVID-19 pandemic, visitor economy represented almost 30% of the region's economy, generating employment of approximately 37% of the total the Phillip Island and San Remo region's employment in 2019-20. Due to COVID-19 disruptions, total domestic visitors had seen 45% decline in 2020-21 from 2,595,000 to 1,421,000 as result of border closures and COVID safe measurements.

With the international border re-opening and the return of major events, such as the Motorcycle Grand Prix, the visitor economy in the Phillip Island and San Remo region is rebounding with increased number of domestic travellers staying longer and spending more. Total domestic expenditure has surpassed its pre-COVID levels with almost \$600m of contribution to the visitor economy by domestic travellers in 2022.

Phillip Island Domestic Tourism Expenditure



Source: Austrade, Tourism Research Australia, Phillip Island and San Remo (2019-20).

Case Studies

1

New Planned Project

Phillip Island Hot Springs

With the opening of the new Phillip Island Hot Springs, it is predicted to attract more travellers to the region during winter (June to September) which is usually off-peak for most accommodation, attraction, and food & beverage service providers in the Phillip Island and San Remo region, whilst generating 200-300 additional jobs in the first year of operation.

2

Tourism Growth

The North Pier Hotel & Isle of Wight Hotel

Located in the central township of Cowes, the North Pier Hotel is situated on a North facing beach overlooking Western Port Bay. Since its renovation and new furnishings in 2017, the North Pier Hotel accommodates up to 70 rooms for travellers. The planned development of the Isle of Wight site, in Cowes, will deliver significant food and beverage and accommodation growth.

3

New Planned Market

Cruise Ships

After the easing of COVID-19 policies, Phillip Island is welcoming cruise ships again, with tenders arriving at the Rhyll Jetty area. The re-commencement of cruise ships is estimated to attract approximately 15,000 travellers into the region annually, generating \$2.5 million of economic impact.



4.4 Tourism: COVID-19 Impact

The pandemic resulted in significant disruption to the visiting economy in the Phillip Island and San Remo region, as evident by tourism data, lack of events held and workforce challenges

A comprehensive view of COVID-19's impact on the tourism sector in Phillip Island and San Remo was undertaken to better understand the challenges that were brought, and the opportunities available post pandemic.

Tourist Population

- Domestic overnight and daytrip visits to the region dropped by 46% in the year ending December 2020 compared to the previous year, and international overnight visits decreased a whopping 73%.
- The drop in the visitor population can be explained by a plethora of COVID-19 restrictions including, lockdowns and closed international borders, as well as strong stay-at-home advice.

Events

- Many events previously popular and successful in attracting large numbers of tourists have been cancelled as a result of the pandemic.
- This includes the cancellation of Superbike World Championship 2021 and delayed the event in 2022. The Australian Motorcycle Grand Prix 2020 and 2021.
- These major events provide significant economic input through direct and indirect employment of local trades, suppliers and workforce to deliver the event.

Workforce

- 1,100 less persons were employed in the tourism industry for the region in 2020 compared to the previous year, translating to a 19% drop in direct employment.
- This has seen a change in the nature of the jobs that were available during this period due to the mandatory requirement of all non-essential workers to stay at home. This significantly impacted the accommodation, attraction, and food and beverage industries.

Phillip Island's tourism industry was heavily impacted by cancellation of events, such as Australian Grand Prix 2020 and 2021, and the Australian Motorcycle Grand Prix 2020



Phillip Island's major attractions were negatively impacted by COVID-19 restrictions and lockdowns.



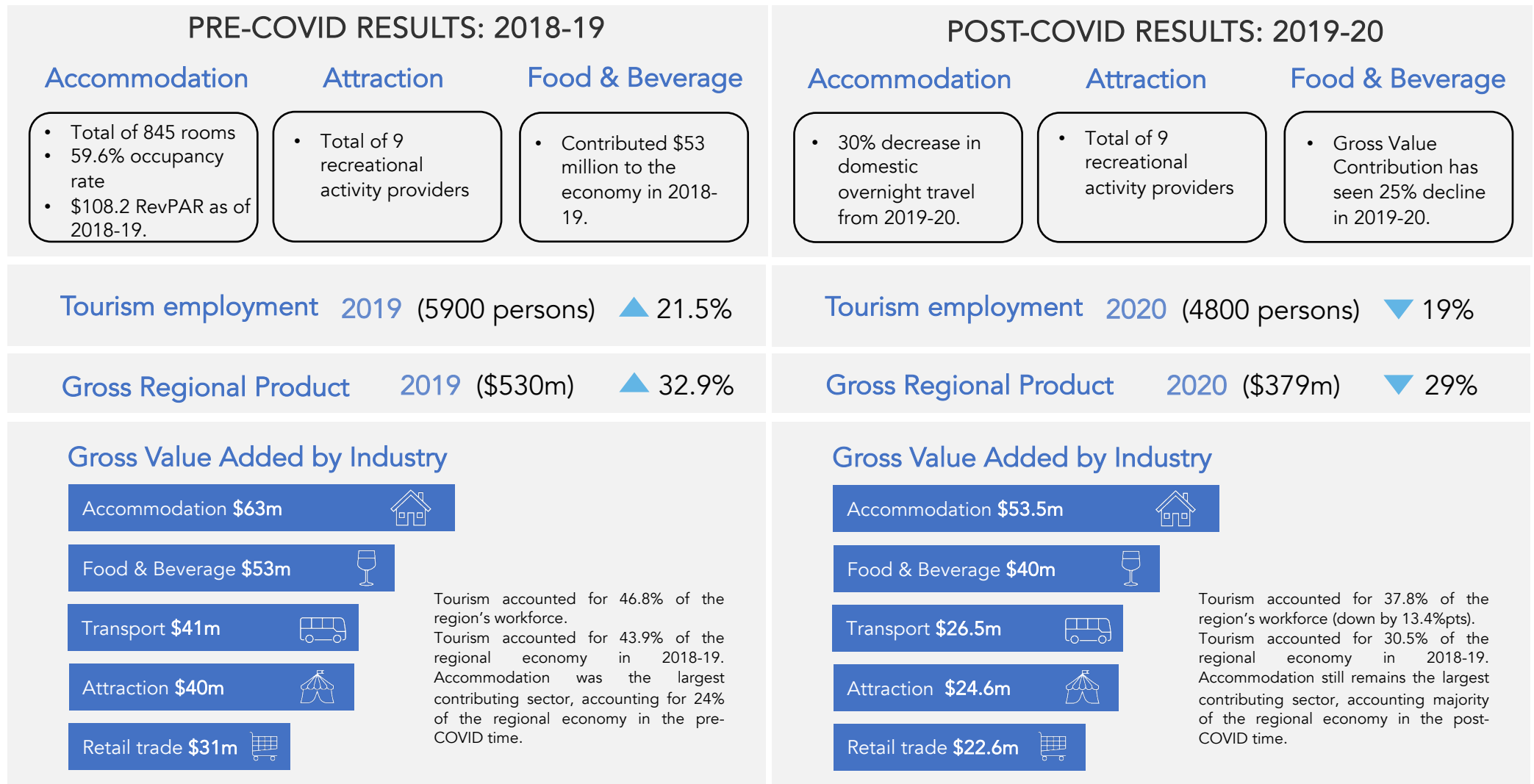
Note 1. Source: Victoria State Government, Jobs, Precincts and Regions, "Regional Tourism Summary" report



4.4 Tourism: COVID-19 Impact

Regional Tourism Summary highlights 19% decline in tourism employment and 29% decrease in Gross Regional Product of visitor economy in the Phillip Island and San Remo region

Extrapolation from Regional Tourism Summary 2018-19, 2019-20 depicts the visitor economy data on pre- and post-COVID-19 tourism across the Phillip Island and San Remo region.



Source: Regional Tourism Summary, 2018-19 & 2019-20.

Phillip Island and San Remo Visitor Economy Workforce Plan

4.5 Tourism: COVID-19 Impact (Contd.)

The pandemic resulted in significant disruption to the visiting economy sector in the Phillip Island and San Remo regions, as evident by tourism data, lack of events held and workforce challenges

Support was provided by the Australian and Victorian Government to help combat the impact of the pandemic on the visiting economy industry.

Regional Travel Voucher

- Throughout 2020-21, a Melbourne Travel Voucher Scheme was introduced, offering 40,000 vouchers for \$200 for travel in greater Melbourne, and an additional 10,000 vouchers to support travel in regional Victoria.¹

Regional Tourism Accommodation Support Program

- This was introduced to provide targeted support for regional accommodation providers over the period July to September 2020 that were impacted by stay at home and state border restrictions.

Broader economy wide support

- During 2020, the Victorian Government focused on delivering a range of economy wide supports, such as three rounds of the Business Support Fund, that complemented the Commonwealth Government's broad supports, including JobKeeper. This included some relief for accommodation and food services businesses and travel agency and tour arrangement services.

Tourism Post Lockdowns

- The majority of visitors in Phillip Island are international visitors, comprising up to 70% of the total visitors at Phillip Island Nature Parks in 2019.
- In Victoria, travelling restrictions were first lifted for those living in the state, then slowly eased for those travelling from interstate and finally international travel restrictions were lifted. This has translated to a slower recovery for Phillip Island and San Remo visitor economy compared to other areas of regional Victoria.

Incentives

- A \$87.5 million Outdoor Eating and Entertainment Package was introduced to support hospitality businesses prepare for reopening post covid-19 restrictions across Victoria.

Support was provided by the government to help stimulate the visitor economy post Covid-19 lockdowns



Note 1. Source: Victoria State Government, Jobs, Precincts and Regions, "The Impact of the COVID-19 pandemic on the tourism and events sectors" report



4.6 Tourism: Workforce





The common workforce challenges for the Phillip Island and San Remo region are identified through data sources from DJPR, Bass Coast Shire Council, Regional Workforce Research, and 2021 Census Data

Workforce Challenges for the Region

The common workforce challenges for the Phillip Island and San Remo region were identified through data analysis (i.e., 2021 Census Data, Regional Tourism Summary, Deakin research findings) and consultations with representatives from Department Job Precinct, and Regions, Bass Coast Shire Council.

- There is a high demand for skilled labour force in the region
- There is an increasing ageing workforce
- There is a seasonality of demand for labour identified, August being the low season
- There is a growing interest for industry attractiveness as a career
- There is an increasing focus towards staff training, career development pathways and programs
- There is a high reliance on locally-based workers due to its geographically isolated location
- There is a high reliance on part-time and casual labour as tourism is the main contributor for the economy
- There is an increasing difficulty attracting labour to the region due to its isolated location
- There is a strong competition from other industries for labour (i.e., construction offers higher salary)
- There is a high need for access to worker accommodation due to its unavailability of rentals
- Regional industry providers often need to retain staff all year around to secure surge workforce
- There is an increasing number of applicants who have no intention of working
- There are insufficient events during off season

Sources

	Department of Job Precinct, Regions	Engaged with key representatives from DJPR, Tourism & Events and utilised data presented during Phillip Island Tourism Conference
	Bass Coast Shire Council	Engaged with key stakeholders from Bass Coast Shire Council to discuss general demographic challenges and opportunities
	Deakin Research	Utilised preliminary findings from NMC's Regional Workforce Research in partnership with Deakin University
	Desktop Analysis	Utilised Australian Bureau Statistics' data on tourism and 2021 Census Data





4.6 Tourism: Workforce (contd.)

The pandemic resulted in significant disruption to the visiting economy sector in the Phillip Island and San Remo regions, as evident by tourism data, lack of events held and workforce challenges

Support was provided by the Australian and Victorian Government to help combat the impact of the pandemic on the visiting economy industry.

Workforce Supply for the Region

- In 2018-19, tourism comprised on average 11.6 per cent of total (direct and indirect) employment and 9.4 per cent of GRP in regional Victoria. This is in comparison to tourism related jobs in Melbourne in the same period, comprising 5.9 per cent of total (direct and indirect) jobs and 5.1 per cent of Gross Regional Product (GRP) for the Melbourne region.¹
- In 2018-19, tourism accounted for 47 per cent in the Phillip Island region, highlighting the importance of a strong visitor economy to stimulate employment in the region.¹

Record Unemployment in Australia

- The number of jobs has been steadily increasing year on year since 2017 for Phillip Island pre-COVID with the total number of jobs in the region increasing from 8,050 in 2017 to 8,377 in 2018 to 8,582 in 2019 for the year ended 30 June.
- However, a decline in employment, particularly in the visitor economy industry was seen post-covid. Whilst in 2018-19, 5,900 people were employed in the tourism sector both directly and indirectly in the region, in 2019-20 only 4,800 people were employed, resulting in a 19% drop year on year.

Visitor Economy Workforce Competitors

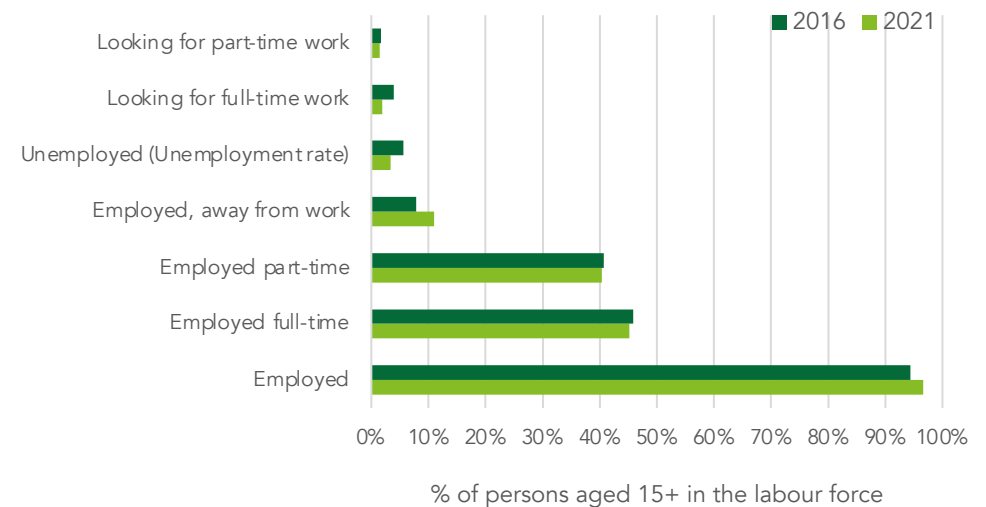
- The tourism sector workforce is constrained by competing employment demand across various other industries in the Phillip Island and San Remo industries, including the aged care, engineering, and construction industries, as well as recent demand for remote working optionality.
- The Census Data (2021) has highlighted the 3.2% increase in number of employees who are working in remote environments in Phillip Island region from 2016-2021².

Note 1. Source: Victoria State Government, Jobs, Precincts and Regions, "The Impact of the COVID-19 pandemic on the tourism and events sectors" report
 2. Source: Census Data (2021), Australian Bureau of Statistics, Employment Status in Phillip Island

Employment Status in Phillip Island

- The size of Phillip Island's labour force in 2021 was 5,724 of which 2,314 were employed part-time and 2,585 were full-time workers².
- In 2016-21, there has been 2.2% growth in number of employed people whilst the number unemployed showed a decrease of 2.2% in the Phillip Island region.
- In the same period, the number of employed people who are away from work (i.e., remote workers) showed an increase of 3.2%².

Phillip Island Employment Status, 2016-21





4.6 Tourism: Workforce (contd.)

The pandemic resulted in significant disruption to the visiting economy sector in the Phillip Island and San Remo regions, as evident by tourism data, lack of events held and workforce challenges

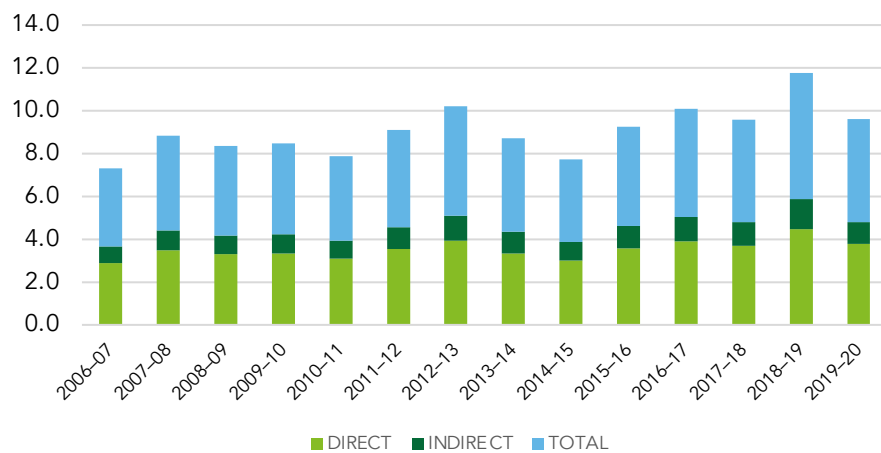
Tourism Employment

Tourism is a key economic driver in the Phillip Island and San Remo region, generating employment to approximately 5,900 people and accounting for 46.8% of the region's employment (both direct and indirect jobs) in 2018-19.

Heavily affected by the closure of international and state borders post COVID-19, Phillip Island had experienced a dramatic drop in the number of employment generated by the tourism industry in 2019-20.

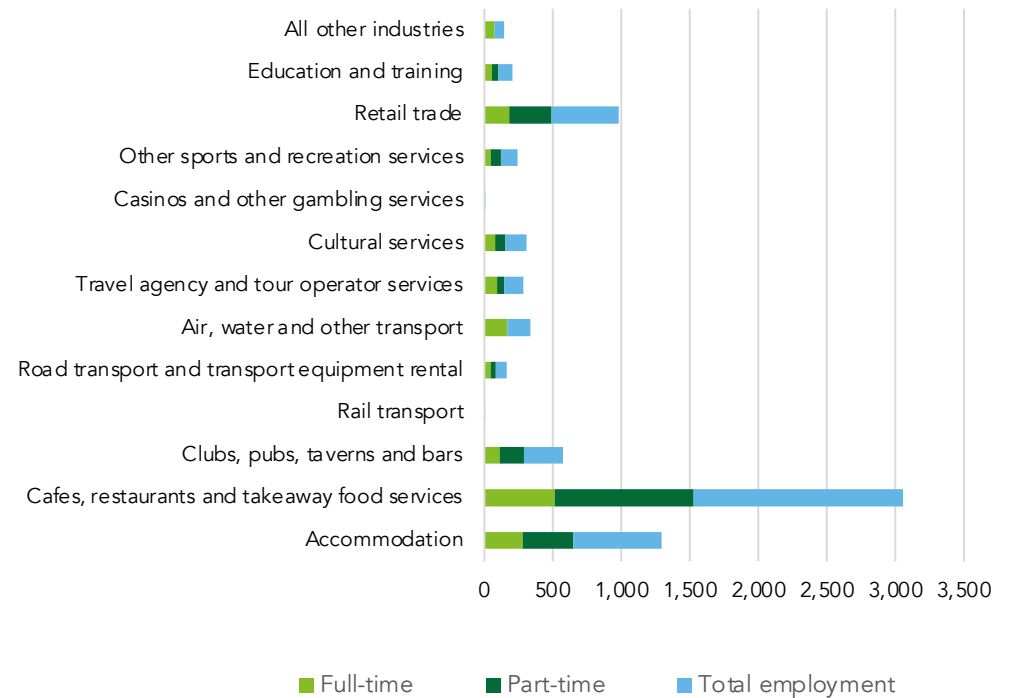
In 2019-20, the main contributors to the region's total employment were Food & Beverage, Accommodation, Retail and Recreation & Attraction sectors. In the same period, majority of the jobs in above mentioned sectors were offered on a part-time basis.

Tourism Employment in Phillip Island '000



Employment in the Phillip Island Region by Industry Sub-Groups

2019-20 Employment in Phillip Island by Industries



Note 1. Source: Victoria State Government, Jobs, Precincts and Regions, "The Impact of the COVID-19 pandemic on the tourism and events sectors" report



4.7 Tourism: Forecast

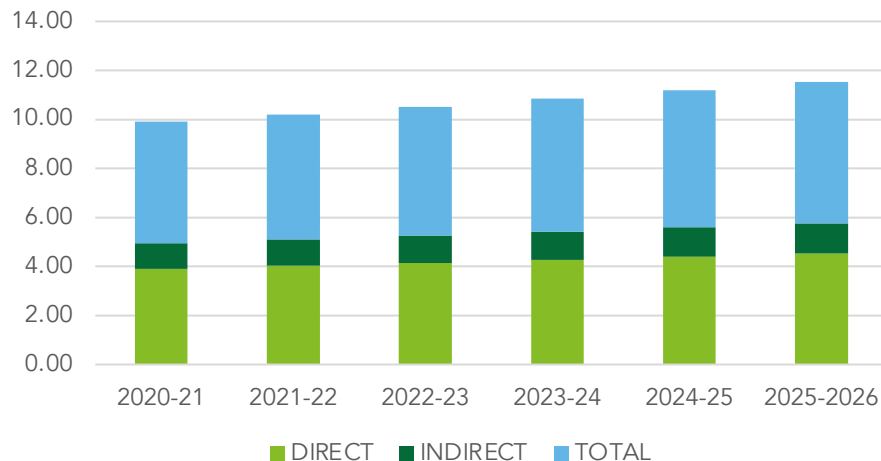
The visitor economy in Phillip Island and San Remo region is expected to soar again with the increasing number of both international and domestic visitors, generating a greater consumption in the region

Tourism Employment Forecast

Tourism employment in the Phillip Island and San Remo region is predicted to rise drastically with the opening of new Phillip Island Hot Springs and Isle of Wight re-development which requires an immediate staff levels of over 400 in the first year of operation. The demand for hospitality and accommodation workforce is forecasted to surge with an increasing competition within the region as well as a low accessibility of permanent rentals in Phillip Island and San Remo.

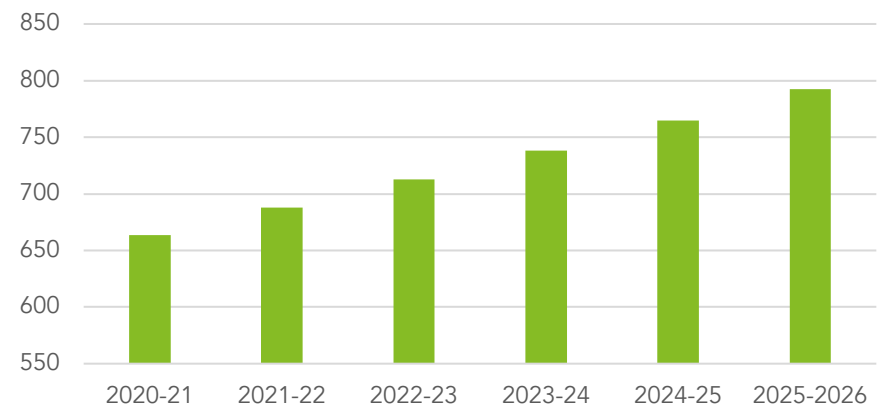
Tourism sectors (i.e., accommodation, attraction and food & beverage) are still expected to dominate the main employment stream in Phillip Island and San Remo. With the return of major events, such as MotoGP and Superbike World Championship in 2023, as well as the increasing return of domestic and international visitation to Victoria, the tourism industry is expected to grow.

Tourism Employment Forecast '000

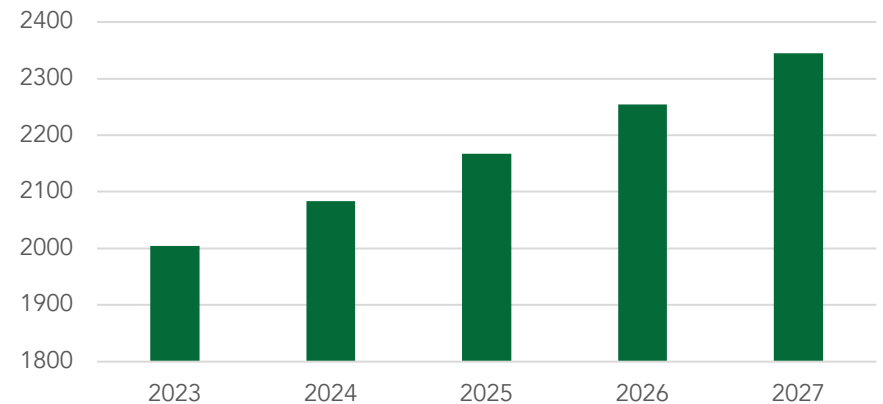


Tourism Visitors & Consumption Forecast

Tourism Consumption Forecast \$m



Domestic Visitors Forecast



Note 1. NMC Forecasting Model for Phillip Island and San Remo region's visitor economy
Phillip Island and San Remo Visitor Economy Workforce Plan



4.8 Tourism: Regional Education

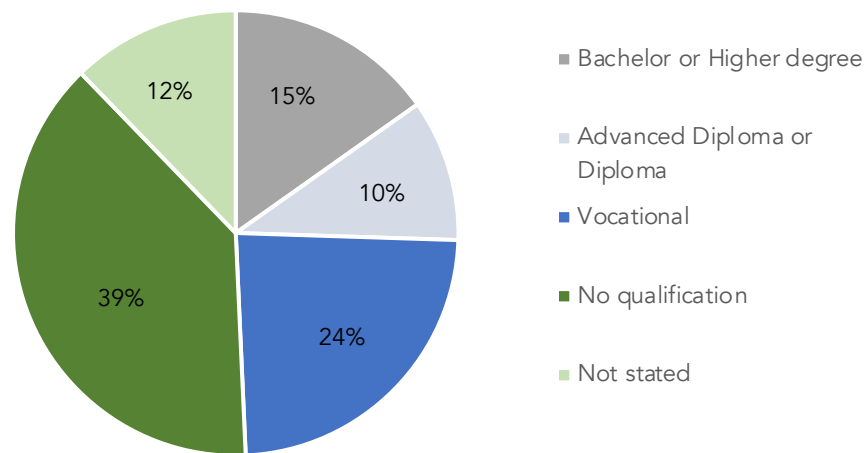
Phillip Island and San Remo tourism providers are using education and training as a workforce retention strategy, however, there are challenges associated with providing traineeships for the region

Education and Training

There is a growing trend for turning casual jobs into a career in Hospitality & Tourism in the Phillip Island and San Remo region. Tourism industry providers have been utilising education and training opportunities as a workforce strategy to retain staff for a longer period.

There is limited access to tertiary education in the Phillip Island and San Remo region due to its isolated geographical location and long distances. The closest higher education facility, Chisholm TAFE, is a 1-hour drive from Phillip Island to its Wonthaggi campus.

Highest Qualification Achieved



Australian Bureau of Statistics, Census Community Profiles, Phillip Island and San Remo (2021)

Challenges

Local employers and industry-specific committees in the region often provide external training for their employees; however, staff members often feel a lack of engagement and motivation due to online delivery of education and training.

There is no organisational alignment between employer organisations and selected education providers. Employers often choose training programs based on previous relationships with the education provider. This further demonstrates a greater gap in training facilities, as some education providers may not fully facilitate the sufficient environment for learning and education.

Government Fund & Support

- **Regional Hospitality Program** provides 240 trainees with 12 months of employment in regional organisations while completing Certificate III in Hospitality & Tourism.
- **Accommodation Jobs** creates 320 roles in Hospitality & Tourism with \$5.6 million fund from the state government.
- **Hospitality Workers Pool Project** generates \$6.6 million funding from the state government to create a pool of 500 job ready workers in Accommodation, Food & Beverage services with required skills training and education.
- **Department of Education & Training** provides traineeships in Hospitality as part of its **Free TAFE Scheme**.

Current State



5.1 Current State: Methodology

The Current State Methodology involves capturing relevant inputs from survey results and consultation findings, and an analysis of the challenges, to define prioritised challenges for the visitor economy in the Phillip Island and San Remo region

Purpose

A comprehensive current state analysis was undertaken to identify workforce capability and capacity of visitor economy in the Phillip Island and San Remo region.

The **key workforce challenges** that are pertinent to Phillip Island San Remo communities are identified and its analysis is administered on quantitative (i.e., industry targeted **survey**) and qualitative elements (i.e., **one-on-one consultations** and **design-thinking workshop results**) which include the data capture of segmented industry information, and discussion and collaboration with key stakeholders from the region to provide a clear understanding of emerging workforce challenges for the region.

The current state analysis utilises an **Analysis Framework** against the six priority areas of Regional Workforce Development Model. The evaluation of the current workforce challenges across segmented industries (i.e., **Accommodation, Attraction, and Food & Beverage**) enables the stakeholders to **prioritise challenges** based on workshop findings and tailor actions that will generate the maximum impact in Phillip Island and San Remo communities.



Methodology

	Survey	Design and analyse quantitative <u>data</u> and <u>observations</u> through targeted industry survey to extract valuable insights about workforce capability and capacity of the region
	Consultations	Engage with key stakeholders to identify current state and emerging workforce challenges and opportunities for the region
	Workshop	Conduct current-state workshop based on principles of design-thinking to discuss visitor economy's workforce challenges and prototype solution that are pertinent for the region
	Findings	Assess the level of priority for the regional workforce challenges based on the findings from design-thinking workshop

Photos from Stakeholder Consultations





5.1 Current State: Methodology (contd.)

The current state analysis involved capturing relevant input from survey results and consultation findings for visitor economy in the Phillip Island and San Remo region

Survey Process

In conjunction with the consultation, stakeholders were required to complete a short survey to identify and understand specific challenges and opportunities for workforce attraction and retention in the Accommodation, Attraction, and Food & Beverage sectors in the Phillip Island and San Remo region.

For evidence-based purposes, stakeholders were required to provide their organisation’s general demographic information (i.e., staff profile & workforce strategies) which validates the workforce capability and capacity that were selected in the survey and discussed throughout the consultation process.

In addition, the survey was utilised to provide a standardised and guided format for the consultations conducted. These were either completed prior to the consultation or throughout the consultation.

Consultation Process

Destination Phillip Island Tourism Board (DPI) provided NMC with a *shortlist of 47 key stakeholders* consist of local Accommodation, Attraction, and Food & Beverage service providers in the Phillip Island and San Remo region. NMC reached out to each stakeholder via email (with follow-ups as required) which distributed a survey in addition to co-ordination of a suitable time for a one-on-one 45 min. consultation. As part of the consultation process, key stakeholders were asked to discuss their organisation’s workforce challenges and identify key focus areas for potential improvement and opportunities. The engaged stakeholders also shared any support and help that they wish to receive in order to achieve a more sustainable workforce outcome in the future state.



NMC Consultation/Interview Guide





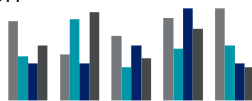
5.1 Current State: Methodology (contd.)

The current state analysis involved the survey findings from 12 organisations, and consultations with 11 pertinent stakeholders in the Phillip Island and San Remo region



Quantitative Survey Participants

- Phillip Island Nature Parks – Large Attraction
- Anchor Belle Holiday Park – Small Accommodation
- Waves Apartments – Medium Accommodation
- Pino’s Trattoria – Small Food & Beverage
- Ingenia Holidays Phillip Island – Large Accommodation
- The Island Accommodation – Medium Accommodation
- Hotel Phillip Island – Small Food & Beverage
- Phillip Island Grand Prix Circuit – Large Attraction
- Saltwater Phillip Island – Large Food & Beverage
- Bassine Specialty Cheeses – Small Food & Beverage
- North Pier Hotel – Large Accommodation & Food & Beverage
- Phillip Island Chocolate Factory – Large Attraction



Qualitative Consultations

- San Remo Hotel Motel – Small Food & Beverage
- Silverwater Resort – Large Accommodation
- Phillip Island Grand Prix Circuit – Large Attraction
- Phillip Island Nature Park – Large Attraction
- North Pier Hotel – Large Accommodation
- Anchor Belle Holiday Park – Small Accommodation
- Phillip Island Chocolate Factory – Large Attraction
- Wildlife Coast Cruises – Large Attraction
- San Remo Fisherman's Co-Op – Small Food & Beverage
- Phillip Island Apartments – Large Accommodation
- A Maze’N Things – Medium Attraction

Note: Consultations were undertaken both virtually and in-person from 16th of September until 21st of September.





5.1 Current State: Methodology (contd.)

The current state methodology also involves engagement with key stakeholders and a 3-hour workshop with pertinent industry providers and Steering Committee members to identify and prioritise key workforce challenges of visitor economy in the Phillip Island and San Remo region



Current State Workshop

The current state workshop has two key aims:

- (a) To align all key stakeholders (attendees) on the current state analysis based on obtained quantitative and qualitative data. This is to achieve consensus and agreement on the emerging challenges of visitor economy workforce in the Phillip Island and San Remo region.
- (b) To prioritise key challenges and prototype a solution for emerging workforce challenges based on the segmentation of tourism industries in the Phillip Island and San Remo region.

The workshop outcomes and outputs provide a prioritised challenges of visitor economy workforce and tailored strategies and actions for each segments of industry providers in the Phillip Island and San Remo region.

Workshop Details

Venue: Ramada Resort, Phillip Island

Date: 19th October 2022

Time: 9:30am – 12:30pm

Attendees:

Kim Storey	General Manager
Catherine Basterfield	DPI Board Chair
Peta Wittig	Phillip Island Nature Parks
Michelle Stewart	Phillip Island Nature Parks
Taylah Fox	A' Maze N Things
Paul Mannix	San Remo Fisherman's Co-Op



5.2 Current State: Findings

The Current State Analysis involves the survey findings from 12 pertinent stakeholders in the Phillip Island and San Remo region



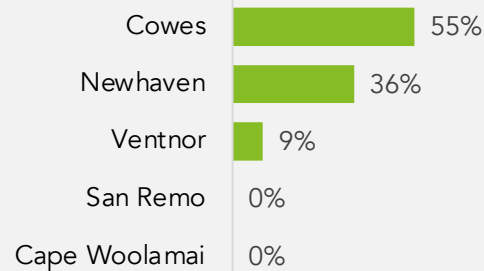
Survey Participants

- Phillip Island Nature Parks
- Anchor Belle Holiday Park
- Waves Apartment
- Pino's Trattoria
- Ingenia Holidays Phillip Island
- The Island Accommodation
- Hotel Phillip Island
- Phillip Island Grand Prix Circuit
- Saltwater Phillip Island
- Bassine Specialty Cheeses
- North Pier Hotel
- Phillip Island Chocolate Factory



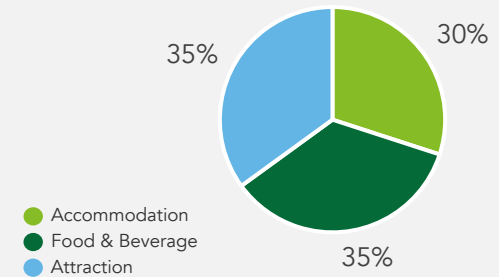
Region & Township

In which region/township does your organisation primarily operate?



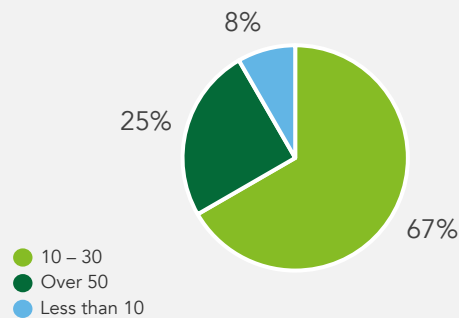
Industry/Sectors

What type of services does your organisation provide?



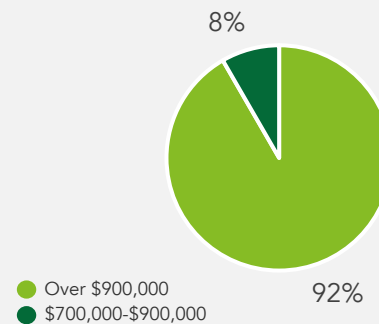
Staff Levels

How many staff does your organisation employ? (including FTE, PTE and casual)



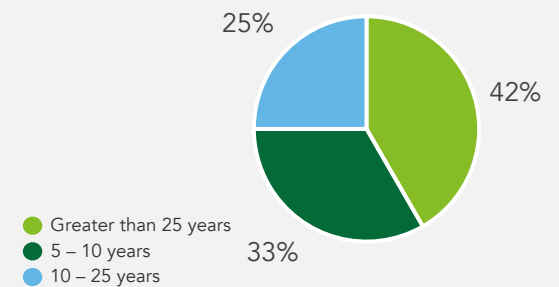
Annual Revenue

What is the approximate annual revenue of your organisation?



Organisation History

How long has the organisation been in operation?





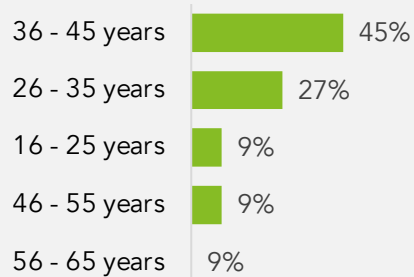
5.2 Current State: Findings (contd.)

The Current State Analysis involves the survey findings from 12 pertinent stakeholders in the Phillip Island and San Remo region



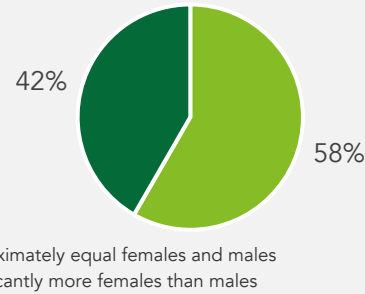
Age Demographic

What is the average age of your employees?



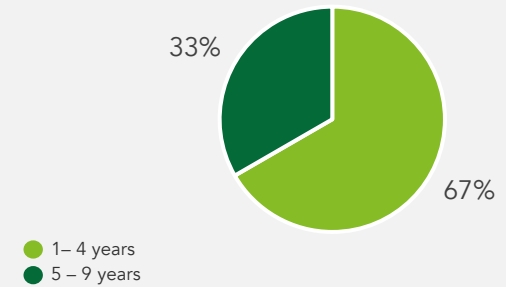
Gender Ratio

What is the gender ratio in your organisations?



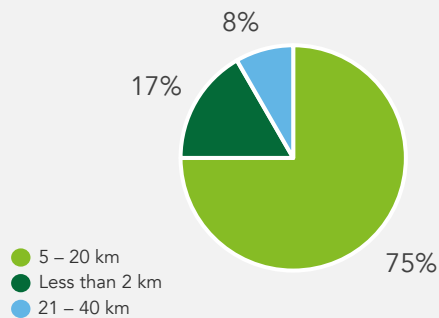
Employee Tenure

How long on average do your employees stay within the organisation?



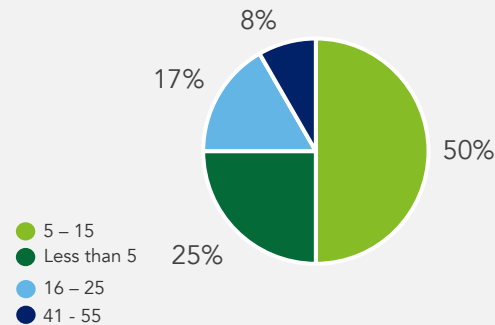
Employee Residence

What is the average distance of your employees' residence to the organisation?



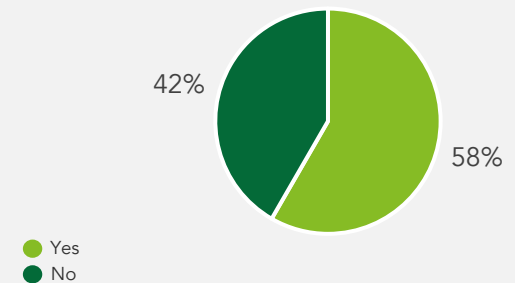
Staff Recruitment

What is the total number of hires at your organisation (in the last 12 months)?



Re-location

Have any of your new talent relocated for their role at your organisation?





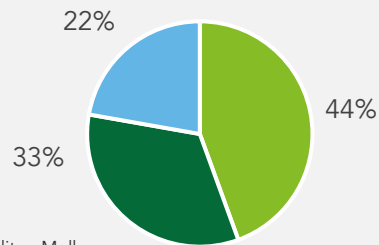
5.2 Current State: Findings (contd.)

The Current State Analysis involves the survey findings from 12 pertinent stakeholders in the Phillip Island and San Remo region



Relocation

Select options where your new talent has relocated from

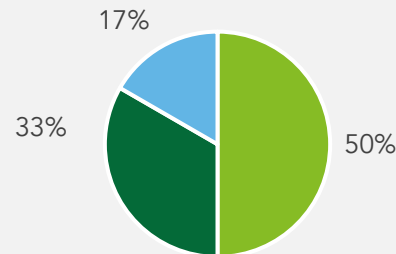


- Metropolitan Melbourne
- Interstate
- Overseas/International



Staff Attraction

How many re-advertisements required to fill out an open position(s)?

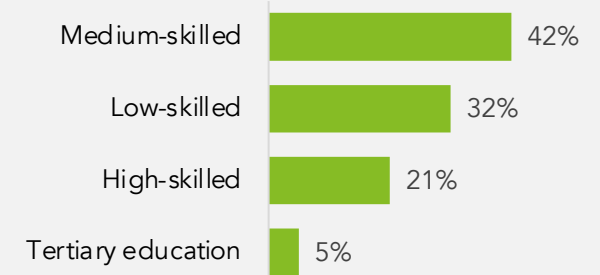


- 1 - 3
- 4 - 10
- 10 - 20



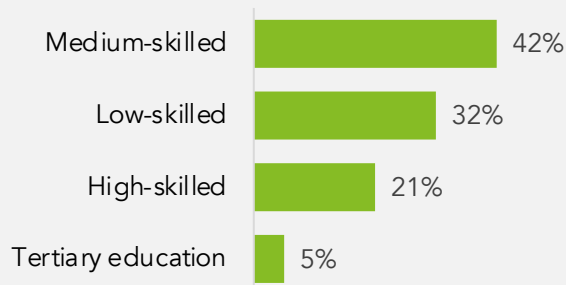
Employee Skills

What level of skills have you attracted in the last 12 months?



Employee Skills

What level of skills is your organisation experiencing difficulty attracting?



5.3 Current State: Case Studies

The North Pier Hotel has been selected as a case study with unique insights in the Current State Analysis of the Visitor Economy Workforce in the Phillip Island and San Remo region

1

Visitor Economy Workforce Strategy & Plan

The North Pier Hotel

Overview

The North Pier Hotel is a large-sized accommodation and food & beverage service provider in the central township of Cowes, Phillip Island. Facing one of the Victoria's only North coastline, Western Port Bay, the North Pier Hotel differentiates their service by its short distance to the main beach. The Hotel provides up to 70 rooms for travellers whilst accommodating 15 houses for staff members who are having difficulty finding a place in the region.

Workforce attraction has always been a problem for the Hotel; however, the lack of skilled labour has become severe after COVID-19 disruptions. Currently, the organisation is understaffed and always looking for new staff, especially for the peak/surge season. The Hotel utilises referral strategies and word of mouth methods in order to attract new talent and offers in-house training upon commencement. Online recruitment agencies, such as SEEK have shown poor effectiveness, attracting applicants with no intention of taking the role.

Current Strategies & Potential Solutions Identified

The North Pier Hotel accommodates their staff members by providing up to 15 houses for short-term rentals. Although the staff accommodation helps the organisation to retain skilled labour, there is a larger risk of running a deficit which could lead to unsustainable outcomes in the long-term.



5.3 Current State: Case Studies (contd.)

The North Pier Hotel has been selected as a case study with unique insights in the Current State Analysis of the Visitor Economy Workforce in the Phillip Island and San Remo region

2

Visitor Economy Workforce Strategy & Plan

Phillip Island Nature Parks

Overview

Phillip Island Nature Parks is a large sized conservation not for profit organisation that operates ecotourism experiences on Phillip Island. Revenue raised through their attraction services is invested in vital research, environment and education programs.

Regardless of the reduced number of visitors, the Nature Parks requires same capacity of staff all year around. Previously employed fixed-term contractors, however, now majority of staff are employed under permanent part-time position due to recent change in job design. The organisation relies heavily on skilled labour workforce and hence, there are less demand for young casual employees within the organisation.

Current Strategies & Potential Solutions Identified

Due to its well-known reputation in the community, the Nature Parks hasn't had trouble attracting talent however, the number of quality applicants has decreased in the last 24 months. With the rise of flexible work arrangements, the organisation is now facing major competition with remote work employers in Melbourne and other major cities.



5.3 Current State: Case Studies (contd.)

The San Remo Hotel Motel has been selected as a case study with unique insights in the Current State Analysis of the Visitor Economy Workforce in the Phillip Island and San Remo region

3

Visitor Economy Workforce Strategy & Plan

San Remo Hotel Motel

Overview

San Remo Hotel Motel is a small sized accommodation and food & beverage service provider located in San Remo, Victoria. Recently selected as the 2022 Winner of Best Casual Dining and Best Pub Bar Regional, San Remo Hotel Motel provides its visitor with gourmet cuisine restaurant in their San Remo Hotel Bistro and short accommodation in their three-star rated six motel units.

As an outlier in the community, the Hotel Motel has been very successful in attracting and retaining both skilled and casual workforce without any advertisements or announcements. The management utilises strong community engagement and integration, having close relationships with the local football and netball teams. By building a long-lasting connection with its staff, the Hotel Motel doesn't experience any difficulty recruiting employees for the peak season.

Current Strategies & Potential Solutions Identified

The Hotel Motel utilises its internal staff member database and often contacts previous casual employees for the peak season since the average age of staff is relatively young. Additionally, the Hotel Motel shares its casual staff with other service providers in the region (i.e., Silverwater Resort) through its strong partnership and engagement with the Phillip Island and San Remo communities.





5.3 Current State: Case Studies (contd.)

Peninsula Hot Springs and Sovereign Hill have been selected as external case studies with unique insights into the Visitor Economy Workforce in regional Victoria

4

Peninsula Hot Springs

Overview

Peninsula Hot Springs is an award-winning natural hot springs and day spa destination on the Mornington Peninsula, just 90 minutes from Melbourne. With an increasing demand for both international and domestic visitors, Peninsula Hot Springs employs over 300 staff all year around to facilitate their services. However, the previous workforce strategies of utilising recruitment platforms such as SEEK and Indeed have shown poor efficiency as a result of COVID-19 disruptions.

Current Strategies & Potential Solutions Identified

The Peninsula Hot Springs incorporated community engagement as a new strategy to attract, recruit and retain staff coming out of COVID-19. They built multiple partnerships with education providers, local sports clubs, smaller recruitment groups, social media groups (i.e., local FB groups). The organisation is exploring the future growth of international workers in Tourism services.



5

Sovereign Hill

Overview

Sovereign Hill is an open-air museum in Golden Point, a suburb of Ballarat in Victoria, Australia. Sovereign Hill depicts Ballarat's first ten years after the discovery of gold in 1851. Since its opening in 1970, it has become a nationally acclaimed tourist attraction. Despite its strong reputation in the region, Sovereign Hill had experienced a significant decrease in the number of applications after COVID-19.

Current Strategies & Potential Solutions Identified

Sovereign Hill utilised community engagement whilst partnering with tertiary education providers, offering internships, traineeships and apprenticeships to Arts, Music and Drama students. The organisation also facilitated staff requests on changing casual roles into permanent part-time to ensure stability and security of job.





5.4 Current State: In-Depth Analysis

The in-depth analysis of the current state utilises six priority areas for Regional Workforce Development and industry segmentation as anchors to define the key workforce challenges for the region

Detailed Analysis

The current state analysis utilises an in-depth analysis for a review of visitor economy workforce challenges against the six priority areas of the NMC Operating Model and industry segmentation (see below).

The detailed analysis ensures a comprehensive evaluation of the current workforce challenges across segmented industries (i.e., **Accommodation, Attraction** and **Food & Beverage**). A discussion of each element and objective is provided, based on the quantitative and qualitative evidence gathered throughout the project. A detailed analysis enables the stakeholders to **identify challenges** based on workshop findings, and tailor actions that will generate maximum impact in the Phillip Island and San Remo communities.

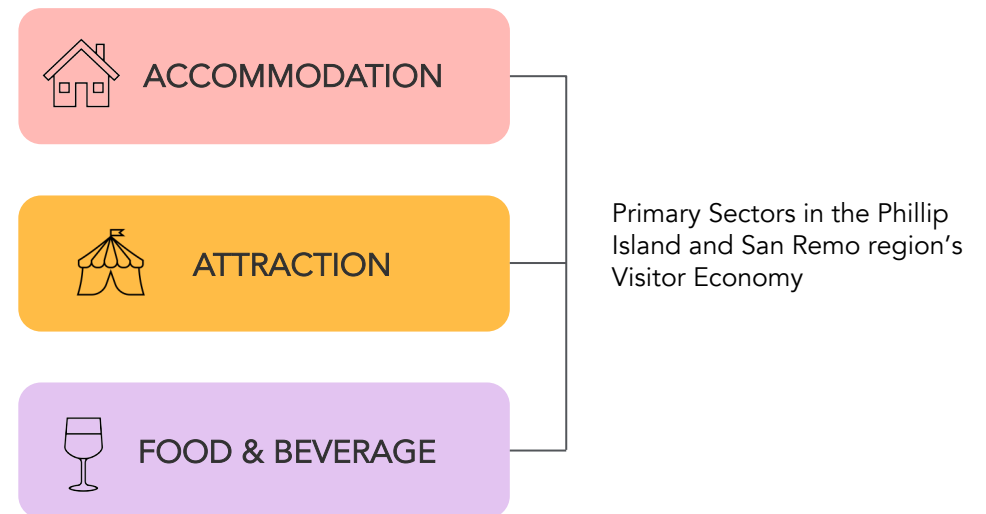
Elements

Based on the NMC Regional Workforce Development Model, the six elements of the Analysis Assessment include:

- | | | | |
|---|-------------|---|-------------------|
| 1 | Attraction | 4 | Skills & Training |
| 2 | Recruitment | 5 | Migration |
| 3 | Retention | 6 | Housing |

Methodology

The in-depth analysis of the current state challenges were identified and evaluated across the six elements of the NMC Regional Development Model by the industry segmentation. The project has identified Accommodation, Attraction, and Food & Beverage as the primary sectors in the tourism sector. Each segment can be further categorised as small, medium, and large sized organisations to understand the industry environment and current state challenges.





5.4.1 Current State: Workforce Attraction

The resultant Current State Analysis of Workforce Attraction for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis



Workforce Attraction



ACCOMMODATION



ATTRACTION



FOOD & BEVERAGE

LARGE

- Having to carry staff throughout the year during off peak in order to secure staff for peak periods. There is a decreasing number of quality applicants due to higher demand of workforce.
- Having to increase remuneration and employee benefits in order to attract quality skilled applicants. There is an increased competition with remote work employers from Melbourne.
- Having to carry staff throughout the year during off peak in order to secure staff for peak periods. There is difficulty attracting peak period surge workforce, having to tailor job design and hours to maximise attraction impact.

MEDIUM




- There is difficulty attracting local workforce due to high demand of jobs and increasing house price in the region. There is a lack of applicants who are fit to the job role meeting the skills required.
- There is difficulty attracting skilled workforce due to high demand of jobs and increased competition with other service providers from the region.
- There is difficulty attracting local workforce due to high demand of jobs and increasing house price in the region. There is a lack of applicants who are fit to the job role meeting the skills required.

SMALL

- There is difficulty attracting local workforce due to high demand of jobs and increasing house price in the region. There is a lack of applicants who are fit to the job role meeting the skills required.
- There is difficulty attracting skilled workforce due to high demand of jobs and increased competition with other service providers from the region.
- There is difficulty attracting local workforce due to high demand of jobs and increasing house price in the region. There is a lack of applicants who are fit to the job role meeting the skills required.

5.4.2 Current State: Workforce Recruitment

The resultant Current State Analysis of Workforce Recruitment for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis

Workforce Recruitment			
	 ACCOMMODATION	 ATTRACTION	 FOOD & BEVERAGE
LARGE	<ul style="list-style-type: none"> There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff. 	<ul style="list-style-type: none"> There is difficulty matching the skills required for the role with a decreasing number of eligible labour force within the region. There is an increasing number of applicants who have no intention of working. 	<ul style="list-style-type: none"> There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff.
MEDIUM	<ul style="list-style-type: none"> There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff. 	<ul style="list-style-type: none"> There is difficulty matching the skills required for the role with a decreasing number of eligible labour force within the region. There is an increasing number of applicants who have no intention of working. 	<ul style="list-style-type: none"> There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff.
SMALL	<ul style="list-style-type: none"> There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff. 	<ul style="list-style-type: none"> There is difficulty matching the skills required for the role with a decreasing number of eligible labour force within the region. There is an increasing number of applicants who have no intention of working. 	<ul style="list-style-type: none"> There is difficulty recruiting peak period surge workforce due to low availability of rentals for the region. Having to utilise employee database to recruit an ex-employee for the peak season.

5.4.3 Current State: Workforce Retention

The resultant Current State Analysis of Workforce Retention for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis



Workforce Retention



ACCOMMODATION



ATTRACTION



FOOD & BEVERAGE

LARGE

- There is a strong competition for skilled staff between local providers and remote work employers from Melbourne. Having to tailor job design and develop career progression programs in order to retain quality skilled workforce. Having to provide short-term accommodation to retain staff.
- There is an increasing number of staff retired due to ageing population of the region. Having to increase remuneration and employee benefits in order to retain quality skilled workforce. There is a growing need for organisations to carry all staff throughout the non-peak season to ensure staff in the peak season.
- There is a high turnover rate for casual workforce due to the young age demographic and low availability of long-term rental. Having to develop career progression programs in order to retain staff. Having to carry all staff throughout the non-peak season to ensure staff in the peak season.

MEDIUM

- There is a strong competition for skilled and casual workforce between local providers. Having to tailor job design and develop career progression programs in order to retain quality skilled workforce. Having to provide short-term accommodation to retain staff.
- Having to tailor job design and offer rotation of different roles in order to retain quality workforce. There is a growing need for organisations to carry all staff throughout the non-peak season to ensure staff in the peak season.
- There is a high turnover rate for casual workforce due to the young age demographic and low availability of long-term rental. Having to develop career progression programs in order to retain staff. Having to carry all staff throughout the non-peak season to ensure staff in the peak season.

SMALL

- There is a strong competition for casual workforce between local tourism providers. Having to focus on culture, and employee benefits in order to retain quality workforce.
- Having to tailor job design and offer rotation of different roles in order to retain quality workforce. There is a growing need for organisations to carry all staff throughout the non-peak season to ensure staff in the peak season.
- There is a high turnover rate for casual workforce due to the young age demographic and low availability of long-term rental. Having to develop career progression programs in order to retain staff. Having to carry all staff throughout the non-peak season to ensure staff in the peak season.



5.4.4 Current State: Skills & Training

The resultant Current State Analysis of Skills & Training for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis



Skills & Training



ACCOMMODATION



ATTRACTION



FOOD & BEVERAGE

LARGE

- There are skills deficiencies and inadequate training options due to lack of education providers in the region
- Lack of engagement and impact for career progression trainings due to older age demographic of labour workforce.
- There are skills deficiencies and inadequate training options due to lack of education providers in the region. Past trainings focused on qualifications rather than skills.

MEDIUM




- There are skills deficiencies and inadequate training options due to lack of education providers in the region
- Lack of engagement and impact for career progression trainings due to older age demographic of labour workforce.
- There are skills deficiencies and inadequate training options due to lack of education providers in the region. Past trainings focused on qualifications rather than skills.

SMALL

- Staff are disengaged and less motivated to complete online delivery of education and training.
- Staff are disengaged and less motivated to complete online delivery of education and training.
- Staff are disengaged and less motivated to complete online delivery of education and training.




5.4.5 Current State: Migration

The resultant Current State Analysis of Migration for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis

Migration			
	 ACCOMMODATION	 ATTRACTION	 FOOD & BEVERAGE
LARGE	<ul style="list-style-type: none"> There is a high demand for recruiting international workers in Hospitality & Tourism services. 	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation). 	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation).
MEDIUM	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation). 	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation). 	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation).
SMALL	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation). 	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation). 	<ul style="list-style-type: none"> Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation).

5.4.6 Current State: Housing

The resultant Current State Analysis of Housing for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis

Housing			
	 ACCOMMODATION	 ATTRACTION	 FOOD & BEVERAGE
LARGE	<ul style="list-style-type: none"> The prevalence of short-term accommodation and increasing rents in the region made it challenging for accommodation providers to provide accommodation for its seasonal and permanent staff. 	<ul style="list-style-type: none"> The prevalence of short-term accommodation and increasing rents in the region made it difficult for attraction providers to attract and retain staff due to low availability of long-term rentals 	<ul style="list-style-type: none"> The prevalence of short-term accommodation and increasing rents in the region made it difficult for food & beverage providers to attract and retain staff due to low availability of long-term rentals
MEDIUM	<ul style="list-style-type: none"> The prevalence of short-term accommodation increased the competition for private rental market, making it difficult for staff to find permanent accommodations. 	<ul style="list-style-type: none"> The prevalence of short-term accommodation increased the competition for private rental market, making it difficult for staff to find permanent accommodations. 	<ul style="list-style-type: none"> The prevalence of short-term accommodation increased the competition for private rental market, making it difficult for staff to find permanent accommodations.
SMALL	<ul style="list-style-type: none"> Increasing rents in the region made it difficult for accommodation providers to attract and retain staff due to low availability of long-term rentals 	<ul style="list-style-type: none"> Increasing rents in the region made it difficult for attraction providers to attract and retain staff due to low availability of long-term rentals 	<ul style="list-style-type: none"> Increasing rents in the region made it difficult for food & beverage providers to attract and retain staff due to low availability of long-term rentals



5.5 Current State: Summary

The resultant current state analysis of Housing for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis



WORKFORCE ATTRACTION

- Having to carry staff throughout the year during off peak in order to secure staff for peak periods. There is difficulty attracting peak period surge workforce, having to tailor job design and hours to maximise attraction impact.
- There is difficulty attracting local workforce due to high demand of jobs and increasing house price in the region. There is a lack of applicants who are fit to the job role meeting the skills required.
- Having to increase remuneration and employee benefits in order to attract quality skilled applicants. There is an increased competition with remote work employers from Melbourne.



WORKFORCE RECRUITMENT

- There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff.
- There is difficulty matching the skills required for the role with a decreasing number of eligible labour force within the region. There is an increasing number of applicants who have no intention of working.
- There is difficulty recruiting peak period surge workforce due to low availability of rentals for the region. Having to utilise employee database to recruit an ex-employee for the peak season.



WORKFORCE RETENTION

- There is an increasing number of staff retired due to ageing population of the region. Having to increase remuneration and employee benefits in order to retain quality skilled workforce. There is a growing need for organisations to carry all staff throughout the non-peak season to ensure staff in the peak season.
- There is a high turnover rate for casual workforce due to the young age demographic and low availability of long-term rental. Having to develop career progression programs in order to retain staff. Having to carry all staff throughout the non-peak season to ensure staff in the peak season.
- There is a strong competition for skilled staff between local providers and remote work employers from Melbourne. Having to tailor job design and develop career progression programs in order to retain quality skilled workforce. Having to provide short-term accommodation to retain staff.

Note: prioritisation of key challenges to be completed after the current state workshop.



5.5 Current State: Summary

The resultant current state analysis of Housing for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis



SKILLS & TRAINING



MIGRATION



HOUSING

- There are skills deficiencies and inadequate training options due to lack of education providers in the region.
- Staff are disengaged and less motivated to complete online delivery of education and training.
- Lack of engagement and impact for career progression trainings due to older age demographic of labour workforce.
- There are skills deficiencies and inadequate training options due to lack of education providers in the region. Past trainings focused on qualifications rather than skills.

- There is a high demand for recruiting international workers in Hospitality & Tourism services.
- Lack of ability and capacity to attract and recruit international workers for accommodation services due to requirements for skilled migration visa (i.e., skilled occupations list and size of the organisation).

- The prevalence of short-term accommodation increased the competition for private rental market, making it difficult for staff to find permanent accommodations.
- Increasing rents in the region made it difficult for accommodation providers to attract and retain staff due to low availability of long-term rentals.

Note: prioritisation of key challenges to be completed after the current state workshop.

Future State



6.1 Future State: Methodology

The Future State Methodology involves the development of workforce goals and objectives with prioritised actions against the six priority areas and tourism industry segmentations

Purpose

A comprehensive future state analysis was undertaken to identify workforce goals and strategic actions to address emerging challenges that tourism industries are facing in the Phillip Island and San Remo region.

The future state analysis utilises valuable inputs from the design-thinking workshop and virtual discussions held as part of this project. By evaluating the trends and challenges of the current state against the six key areas of the NMC Workforce Model, workforce actions and activities were defined in each layer of the tourism industry segmentation by the industry leaders during the workshop and virtual discussions.

As part of the Define Future State Phase, a detailed analysis was undertaken at two stages. An overview of the future state was analysed by tourism sectors, enabling a comprehensive evaluation of emerging industry challenges and trends for Accommodation, Attraction and Food & Beverage industries in the Phillip Island and San Remo region. Further evaluation was conducted against the six priority areas of the NMC Workforce Model to enable clearly defined workforce solutions in line with the fast-growing demands of the visitor economy in the Phillip Island and San Remo region.

The extensive evaluation of the proposed solutions enables the Destination Phillip Island Tourism Board (DPI) to prioritise actions and activities that are pivotal in aligning with the fast-changing demands of the visitor economy as outlined in the 5-year Workforce Plan for next steps.

Methodology



DESIGN-THINKING WORKSHOP

Conducted a design-thinking workshop with key industry partners from the region to prioritise emerging workforce challenges and co-design potential solutions collaboratively



VIRTUAL DISCUSSION

Undertaken virtual discussions with all industry partners from the region to discuss and prioritise proposed actions and activities to reach the desired level of future visitor economy

Outcomes



TOURISM INDUSTRY

Evaluated the emerging challenges and trends for Accommodation, Attraction, Food & Beverage industries in the region to clearly define the Future State in line with its demands



SIX PRIORITY AREAS

Evaluated the Future State against six priority areas of the NMC Workforce Model to identify the Future State of the visitor economy in the Phillip Island and San Remo region.



WORKFORCE ACTIONS

Prioritising actions and activities that are pivotal in addressing the future state challenges, meeting the demands of the visitor economy and thereby, supporting industry partners in the region

6.2 Future State By Sector: Methodology

The future state methodology involves the development of workforce goals and objectives with prioritised actions against the industry segmentation

Methodology

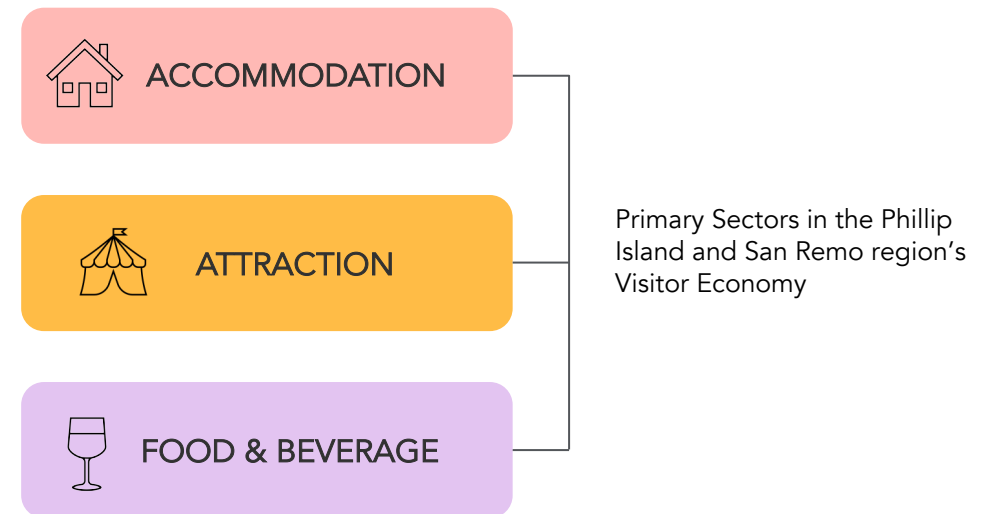
The future state analysis utilises a detailed evaluation of emerging challenges and opportunities that exist in visitor economy industries, namely Accommodation, Attraction, and Food & Beverage.

A comprehensive investigative analysis was undertaken to identify gaps in the visitor economy workforce challenges and gain better understanding of industry trends and their future implications on Accommodation, Attraction, and Food & Beverage sectors in the region.

The key workforce capabilities and capacities that are pertinent to visitor economy communities for the future state in Phillip Island and San Remo are identified and their analysis is administered as qualitative (i.e., one-on-one consultations, design-thinking workshop results) and quantitative elements (i.e., existing artefacts, NMC forecasting models).

The analysis involves the segmentation of visitor economy industries and identification of future workforce capabilities and capacities, enabling stakeholders to co-design strategic actions and activities that will address existing problems in the Phillip Island and San Remo region.

Tourism Industry Segmentation



6.2.1 Future State: Accommodation

The resultant future state analysis of the Accommodation industry for the visitor economy in the Phillip Island and San Remo region



ACCOMMODATION

Matters raised in consultations:

- Tourism will start to become a career rather than a casual job as more industry partners provide career progression and development opportunities for staff.
- Employees in the industry will increase by 200-300 by July 2023 with the opening of Phillip Island Hot Springs in the region.
- Both quantity and quality of accommodation workforce will remain a challenge for the industry providers in the Phillip Island and San Remo region.
- Increasing house prices and low availability of permanent rentals will continue to impose a significant constraint in attracting and recruiting employees outside the region.
- Tourism will continue growth consistently in the Phillip Island and San Remo region with new developments, such as Phillip Island Hot Springs, Isle of Wight and 85 Thompson Avenue.
- The opening of Phillip Island Hot Springs will impose significant workforce challenges as it will create a strong competition between other accommodation providers.

- Workforce supply and workforce quality issues in the Phillip Island and San Remo region are likely for the foreseeable future.
- New developments in the region and strong competition for labour in the accommodation sector will present significant workforce challenges.

Sector forces/trends:

- The historic Isle of Wight will be re-developed by MODA and commence further development of design and construction in early 2024. The new development of the historic site is estimated to grow the number of visitors to the region significantly in the next 5 years.
- The development of 85 Thompson, Cowes will be a new four-storey hotel with residential apartments and a mix of retail space. The development will attract more visitors to the region, increasing the demand for labour force.
- Perceived poor working conditions will continue to be widely identified within the tourism industries. Workforce attraction, recruitment and retention will remain as significant challenges for the tourism sector in the Phillip Island and San Remo region.

- The projected demand for visitors will continue to drive government and industry leaders to undertake new developments to expand accommodation sector in the region.
- Perceived working conditions of the tourism sector will continue presenting workforce challenges for the industry providers.

6.2.2 Future State: Attraction

The resultant future state analysis of Attraction for the Visitor Economy in the Phillip Island and San Remo region



ATTRACTION

Matters raised in consultations:

- There will be a high demand for tourism labour with a growing competition from remote employers in Metropolitan Melbourne.
- Labour demand and supply will be affected by the ageing population and their reluctance to general training and apprenticeship models.
- Workforce supply and quality issues will continue to rise in the Phillip Island and San Remo region with a lack of education providers who offer training and apprenticeship in the attraction and recreational industry.
- Attraction and recruitment of younger generation employees will continue to be a challenge for the tourism sector providers with a lack of clear direction and pathway for the attraction and recreational industry.
- The opening of Phillip Island Hot Springs will impose significant workforce challenges for the small to medium sized attraction providers with staff attraction and recruitment, because the Hot Springs offers a strong value proposition of reputation and branding of an employer.

- The opening of larger developments and competition for labour in the region will present workforce challenges.
- The growth of labour supply and skills & training will be impacted by the lack of uniform and coordinated career plans and pathways for attraction and recreational industry.

Sector forces/trends:

- The recreational industry and large businesses within the industry will continue seeking more managerial type and middle-level leadership positions. There will be a greater need for larger service providers within the industry to attract skilled labour force.
- There will be a significant shift in workforce strategies, as past methods have shown poor efficiency in attracting and recruiting staff post COVID-19.
- Perceived poor working conditions will continue to be widely identified within the tourism industry. Workforce attraction, recruitment and retention will remain as significant challenges for the tourism sector in the Phillip Island and San Remo region.

- Larger businesses in the industry will require a different workforce profile with more skilled workers to deliver managerial type of work.
- Perceived working conditions of the tourism sector will continue presenting workforce challenges for the industry providers.

6.2.3 Future State: Food & Beverage

The resultant future state analysis of Food & Beverage industry for the Visitor Economy in the Phillip Island and San Remo region.



FOOD & BEVERAGE

Matters raised in consultations:

- The opening of Phillip Island Hot Springs will impose significant workforce challenges for the small to medium sized industry providers with staff attraction and recruitment as the Hot Springs offers a strong value proposition of reputation and branding of an employer.
- Labour will continue to come from local Phillip Island and San Remo or neighbouring areas (i.e., Grantville, Wonthaggi, Leongatha). Casual workforce will be less likely to travel long distances to work.
- The increasing house price and low availability of long-term rentals will remain a significant challenge and roadblock for visitor economy industries to attract and recruit workers outside the region (i.e., overseas, interstate, regional Victoria).
- Existing visa policies and requirements will continue to present significant constraints for local small businesses to sponsor international workers.

- The opening of larger developments and competition for labour in the region will present workforce challenges.
- Existing visa policies and requirements will continue to present significant constraints for local small businesses to sponsor international workers.

Sector forces/trends:

- Sustainability, ethics and environmental issues will become increasingly important to younger generation of workers and consumers. They will be attracted to an offer that aligns with these values, and a workforce that has the skills to support and promote these values to consumers.
- Perceived poor working conditions will continue to be widely identified within the tourism industry. Workforce attraction, recruitment and retention will remain as significant challenges for the tourism sector in the Phillip Island and San Remo region.
- The rise of digital technology (i.e., robot waiters, virtual menu, and online payment) will continue creating opportunities for businesses to ease casual workforce shortages by replacing staff. However, there will be a strong resistance from the older generations of customers.

- With an increasing focus on sustainability and climate change, younger generation of workers and consumers will continue to support business practices and workforce that aligns with these values.

6.2.4 Future State By Sector: Summary

The resultant future state analysis of Accommodation, Attraction, Food & Beverage industries for the Visitor Economy in the Phillip Island and San Remo region



ACCOMMODATION

- Workforce supply and workforce quality issues in the Phillip Island and San Remo region are likely for the foreseeable future.
- New developments in the region and strong competition for labour in the accommodation sector will present significant workforce challenges.
- The projected demand for visitors will continue to drive government and industry leaders to undertake new developments to expand accommodation sector in the region.
- Perceived poor working conditions of the tourism sector will continue presenting workforce challenges for the industry providers.



ATTRACTION

- The opening of larger developments and competition for labour in the region will present.
- The growth of labour supply and skills & training will be impacted by the lack of uniform and coordinated career plans and pathways for attraction and recreational industry.
- Larger businesses in the industry will require a different workforce profile with more skilled workers to deliver managerial type of work.
- Perceived poor working conditions of the tourism sector will continue presenting workforce challenges for the industry providers.



FOOD & BEVERAGE

- The opening of larger developments and competition for labour in the region will present workforce challenges.
- Existing visa policies and requirements will continue to present significant constraints for local small businesses to sponsor international workers.
- With an increasing focus on sustainability and climate change, younger generation of workers and consumers will continue to support business practices and workforce that aligns with these values.

6.3 Future State By Priority Areas: Methodology

The resultant future state analysis of Workforce Attraction for the Visitor Economy in the Phillip Island and San Remo region, following in-depth analysis

Methodology

The future state analysis utilises a detailed evaluation of the visitor economy's future state against the six priority areas from NMC Regional Workforce Development Model.

A comprehensive investigative analysis was undertaken to identify gaps in the visitor economy workforce challenges and gain better understanding of industry trends and their future implications on the six priority areas of Regional Workforce Development, namely Attraction, Recruitment, Retention, Skills & Training, Migration, and Housing.

The key workforce capabilities and capacities that are pertinent to visitor economy communities for the future state in Phillip Island and San Remo are identified and their analysis is administered on qualitative (i.e., one-on-one consultations, design-thinking workshop results) and quantitative elements (i.e., existing artefacts, NMC forecasting models).

The analysis involves the NMC Regional Workforce Development Model and identification of future workforce capabilities and capacities, enabling stakeholders to co-design strategic actions and activities that will address existing problems for each priority area in the Phillip Island and San Remo region.

Elements

Based on the NMC Regional Workforce Development Model, the six elements of the In-Depth Analysis include:

- | | | | |
|---|-------------|---|-------------------|
| 1 | Attraction | 4 | Skills & Training |
| 2 | Recruitment | 5 | Migration |
| 3 | Retention | 6 | Housing |



6.3.1 Future State: Workforce Attraction

The resultant future state analysis of Workforce Attraction for the Visitor Economy in the Phillip Island and San Remo region



Workforce Attraction

Matters raised in consultations:

- It is estimated that at least 200-300 staff will be required immediately in the first year of operation upon the opening of Phillip Island Hot Springs in June/July 2023.
- The opening of Phillip Island Hot Springs will impose significant workforce challenges for the small to medium sized industry providers with staff attraction and recruitment as the Hot Springs offers a strong value proposition of reputation and branding of an employer.
- With an increasing demand for the surge workforce during the peak season, there will be a shift in workforce strategies to attract quality staff.
- Labour will continue to come from local Phillip Island and San Remo or neighbouring areas (i.e., Grantville, Wonthaggi, Leongatha). Casual workforce will be less likely to travel long distances to work.

- The opening of larger developments and competition for labour in the region will present workforce opportunities and challenges.
- To meet the increasing demand for casual workforce, industry partners will have to utilise alternative workforce strategies to attract local employees.

Sector forces/trends:

- The visitor economy industries in the Phillip Island and San Remo region will continue to experience significant expansion and diversification.
- Accommodation, Attraction, and Food & Beverage industries will continue to experience sustained growth and gradual number of visitors post pandemic.
- The tourism industry in the region will continue to attract more domestic visitors than international visitors.
- The tourism industry will experience a shift in its strategies to attract and accommodate domestic visitors.
- Sustainability, ethics and environmental issues will become increasingly important to younger generation of workers and consumers. They will be attracted to an offer that aligns with these values, and a workforce that has the skills to support and promote these values to consumers.

- With an increasing focus on sustainability and climate change, younger generation of workers and consumers will continue to support business practices and workforce that aligns with these values.

6.3.2 Future State: Workforce Recruitment

The resultant future state analysis of Workforce Recruitment for the Visitor Economy in the Phillip Island and San Remo region



Workforce Recruitment

Matters raised in consultations:

- It is estimated that at least 200-300 staff will be required immediately in the first year of operation upon the opening of Phillip Island Hot Springs in June/July 2023.
- The opening of Phillip Island Hot Springs will impose significant workforce challenges for the small to medium sized industry providers with staff attraction and recruitment as the Hot Springs offers a strong value proposition of reputation and branding of an employer.
- With an increasing demand for the surge workforce during the peak season, there will be a shift in workforce strategies to attract quality staff.
- Labour will continue to come from local Phillip Island and San Remo or neighbouring areas (i.e., Grantville, Wonthaggi, Leongatha). Casual workforce will be less likely to travel long distances to work.

- The opening of larger developments and competition for labour in the region will present workforce opportunities and challenges.
- Tourism industry will continue to experience difficulties recruiting peak season workforce to facilitate the increasing demand for labour.

Sector forces/trends:

- The visitor economy industries in the Phillip Island and San Remo region will continue to experience significant expansion and diversification.
- Accommodation, Attraction, and Food & Beverage industries will continue to experience sustained growth and gradual number of visitors post pandemic.
- The tourism industry in the region will continue to attract more domestic visitors than international visitors.
- The tourism industry will experience a shift in its strategies to attract and accommodate domestic visitors.
- The visitor economy is expected to generate over 500,000 employment in the Phillip Island and San Remo region with the prediction of 15% growth in 2022-23 compared to pre-COVID times.

- The visitor economy is expected to generate significant number of employment in the region, increasing the demand for Hospitality and Tourism workforce.

6.3.3 Future State: Workforce Retention

The resultant future state analysis of Workforce Retention for the Visitor Economy in the Phillip Island and San Remo region



Workforce Retention

Matters raised in consultations:

- Workforce retention will remain a significant challenge for the tourism industry with the poor working conditions, such as long hours.
- Tourism industry providers will require additional workforce to cover absence of others in order to facilitate the job flexibility.
- There will be an increasing number of staff retired due to the ageing population of the region. It will present significant workforce challenges for the industry to retain skilled workforce.
- Younger workforce will be less likely to remain in the tourism industry with the lack of career progression programs offered in Hospitality and Tourism.

- The ageing population will impose significant workforce challenges, retaining skilled workforce in the tourism industry.
- Younger workforce will be less likely to remain in the tourism industry with the lack of career progression programs and perceived poor working conditions of Hospitality and Tourism roles.

Sector forces/trends:

- Sustainability, ethics and environmental issues will become increasingly important to younger generation of workers and consumers. They will be attracted to an offer that aligns with these values, and a workforce that has the skills to support and promote these values to consumers.
- Poor working conditions will continue to be widely identified within the tourism industries. Workforce attraction, recruitment and retention will remain as significant challenges for the tourism sector in the Phillip Island and San Remo region.
- Due to the increasing number of residents relocated from Metropolitan Melbourne during COVID times, there will be strong competition for skilled labour force between local industry providers and remote work employers in major cities.

- With an increasing focus on sustainability and climate change, younger generation of workers and consumers will continue to support business practices and workforce that aligns with these values.

6.3.4 Future State: Skills & Training

The resultant future state analysis of Skills & Training for the Visitor Economy in the Phillip Island and San Remo region.



Skills & Training

Matters raised in consultations:

- Tourism service providers will continue to experience challenges retaining skilled workforce with the lack of career progression and development programs.
- With the lack of centralised education providers, it will be difficult to achieve an alignment between the purpose of training and selection of providers.
- Traditional traineeship and apprenticeship programs will remain less enticing to the ageing workforce.
- Online traineeship and apprenticeship programs will continue to present challenges attracting tourism workforce.

- Labour supply, skills and training will continue to present significant workforce challenges for the tourism sector providers attracting, recruiting and retaining skilled workforce.
- Traditional education and traineeship programs will remain less enticing to the tourism workforce, and it will present challenges to achieve successful workforce retention.

Sector forces/trends:

- The State Government of Victoria will continue to provide significant support for tourism industries by enabling over 500 regional traineeship and apprenticeship opportunities for hospitality and tourism workers to gain relevant skills and training whilst working at regional service providers.
- Perceived poor working conditions will continue to be widely identified within the tourism industries. Workforce attraction, recruitment and retention will remain as significant challenges for the tourism sector in the Phillip Island and San Remo region.

- The projected growth in the visitor economy will continue to drive government and industry to undertake Hospitality and Tourism education and training support to address the increasing demand for tourism service roles.

6.3.5 Future State: Migration

The resultant future state analysis of Migration for the Visitor Economy in the Phillip Island and San Remo region



Migration

Matters raised in consultations:

- Tourism industry will be less reliant on backpackers and international students for the peak season workforce compared to the pre-COVID times. However, businesses will continue to struggle to bounce back from the labour shortage.
- Smaller businesses in the tourism industry will continue to struggle sponsoring international cooks and chefs due to the specific requirements and restrictions of the skilled migrant visa policies.
- Increasing house prices and low availability of permanent rentals in the region will continue to present major challenges and roadblocks to attract, recruit, and retain international workforce in the Phillip Island and San Remo region.

- The low affordability and availability of accommodation and strict requirements for the skilled migration visa will remain to be the main constraints for local businesses to attract, recruit and retain workforce from overseas.

Sector forces/trends:

- Recent expansion to the skilled migration occupations list with new additions of chefs and cooks in the Workforce Skilled Pathways Program will present greater opportunities for businesses to recruit migrants with relevant skills.
- The State Government of Victoria will continue to advocate for the expansion of skilled occupants list to include more tourism related occupations, including hospitality managers.
- The State Government of Victoria will continue to advocate significantly for federal government to reduce visa costs and increase the number of visas allocated to Victoria to support and promote skilled migrants for the tourism workforce.

- The projected growth in the visitor economy will continue to drive government and industry to advocate significantly for the expansion of skilled occupations list to attract and recruit international workforce for the tourism industry.

6.3.6 Future State: Housing

The resultant future state analysis of Housing for the Visitor Economy in the Phillip Island and San Remo region



Housing

Matters raised in consultations:

- Limited supply and the rising popularity of short-term rental accommodation (i.e., Airbnb) will continue to decrease availability and affordability of rental properties in the region.
- Increasing house prices and low availability of permanent rentals will remain a significant challenge for tourism sectors to attract, recruit and retain staff.
- Tourism industry partners will continue to face significant difficulties providing housing and short-term accommodation for staff as part of their workforce strategy.
- Local businesses who currently provide short-term accommodation will start to experience financial sustainability issues with the significant growth of house prices in the Phillip Island and San Remo region.

- Housing affordability and availability driven by the increasing number of Airbnb will remain a significant challenge for businesses across all tourism regions to attract, recruit and retain workforce.
- Decreasing availability and affordability of rental properties will continue to present challenges in housing and infrastructure expansion.

Sector forces/trends:

- Housing prices in the Phillip Island and San Remo region are expected to rise gradually.
- The opening of new developments will present greater challenges for tourism workforce to find permanent rental properties with an increasing demand for labour force in the Phillip Island and San Remo region.
- As a lifestyle destination and coastal town, the Phillip Island and San Remo region will continue to face a growing demand for short-term rentals, decreasing the availability and affordability of permanent rental properties.

- House prices in the Phillip Island and San Remo region will continue to grow continuously, worsening the availability of rental accommodation in the future.

6.3.7 Future State By Priority Areas: Summary

The resultant future state analysis of Six Priority Areas for the visitor the Phillip Island and San Remo region



WORKFORCE ATTRACTION

- The opening of larger developments and competition for labour in the region will present workforce opportunities and challenges.
- Tourism industry will continue to experience difficulties recruiting peak season workforce to facilitate the increasing demand for labour.
- The visitor economy is expected to generate significant number of employment in the region, increasing the demand for Hospitality and Tourism workforce.



WORKFORCE RECRUITMENT

- The opening of larger developments and competition for labour in the region will present workforce opportunities and challenges.
- Tourism industry will continue to experience difficulties recruiting peak season workforce to facilitate the increasing demand for labour.
- The visitor economy is expected to generate significant number of employment in the region, increasing the demand for Hospitality and Tourism workforce.



WORKFORCE RETENTION

- The ageing population will impose significant workforce challenges, retaining skilled workforce in the tourism industry.
- Younger workforce will be less likely to remain in the tourism industry with the lack of career progression programs and poor working conditions of Hospitality and Tourism roles.
- With an increasing focus on sustainability and climate change, younger generation of workers and consumers will continue to support business practices and workforce that aligns with these values.

6.3.7 Future State By Priority Areas: Summary (contd.)

The resultant future state analysis of Six Priority Areas for the visitor the Phillip Island and San Remo region



SKILLS & TRAINING

- Labour supply, skills and training will continue to present significant workforce challenges for tourism sector providers attracting, recruiting and retaining skilled workforce.
- Traditional education and traineeship programs will remain less enticing to the tourism workforce, and it will present challenges to achieve successful workforce retention.
- The projected growth in the visitor economy will continue to drive government and industry to undertake Hospitality and Tourism education and training support to address the increasing demand for tourism service roles.



MIGRATION

- The low affordability and availability of accommodation and strict requirements for the skilled migration visa will remain to be the main constraints for local businesses to attract, recruit and retain workforce from overseas.
- The projected growth in the visitor economy will continue to drive government and industry to advocate significantly for the expansion of skilled occupations list to attract and recruit international workforce for the tourism industry.



HOUSING

- Housing affordability and availability driven by the increasing number of Airbnb will remain a significant challenge for businesses across all tourism regions to attract, recruit and retain workforce.
- Decreasing availability and affordability of rental properties will continue to present challenges in housing and infrastructure expansion.
- House prices in the Phillip Island and San Remo region will continue to grow continuously, worsening the availability of rental accommodation in the future.

6.4 Future State: Goals

The resultant workforce actions and activities for the future state of visitor economy in the Phillip Island and San Remo region

Purpose

A comprehensive future state analysis was undertaken to identify five-year goals to address and mitigate existing workforce challenges for the future state of the visitor economy in the Phillip Island and San Remo region.

The evaluation of the future state goals enables Destination Phillip Island to prioritise actions and activities that are pivotal in reaching future state in line with the fast-changing demands of the visitor economy and thereby, supporting industry partners in the region.



Workforce Goals

Unique Value Proposition

Create a unique value proposition for the tourism sector for the Phillip Island and San Remo region to attract, recruit and retain staff.

Centralised Workforce System

Develop a centralised workforce system to be utilised collaboratively across the Phillip Island and San Remo tourism sector to promote, recruit and retain workforce.

Local Community

Engage with the local Phillip Island and San Remo community and promote tourism employment and careers.

Sustainable Workforce Environment

Develop a sustainable workforce environment to meet the fast-changing demands of the Phillip Island and San Remo tourism sector.

6.5 Future State: Actions

The resultant workforce actions and activities for the future state of visitor economy in the Phillip Island and San Remo region against the eight key elements.

Purpose

As part of the future state analysis, five-year goals were broken into implementable actions and initiatives to address workforce challenges that the visitor economy is facing in the Phillip Island and San Remo region.

The proposed actions represent specific, step-by-step activities on how to complete a certain workforce goal. The actions can be related to multiple goals as the identified initiatives address overlapping forms of workforce challenges against the six priority areas (i.e., Attraction, Recruitment, Retention, Skills & Training, Migration, and Housing).

The actions were identified, initiated and revised based on discussions with key stakeholders during the design-thinking workshop and virtual discussions.



Workforce Actions

Mapped Goal

Create a membership system for the tourism sector providers in the Phillip Island and San Remo region.	Unique Value Proposition
Create a coordinated recruitment platform for the region, allowing industry providers to attract and recruit candidates that match the skills required.	Centralised Workforce System
Develop a marketing and communications strategy to promote the Phillip Island and San Remo region as a lifestyle destination.	Unique Value Proposition
Turning casual jobs in the Phillip Island and San Remo region into careers in the Hospitality and Tourism industry.	Unique Value Proposition
Centralise education providers for skills and training in the region, aligning the purpose of training with a selection of providers.	Centralised Workforce System
Engage with local community groups through partnerships with sport clubs, local schools, social media groups.	Local Community
Engage with the elderly and retired communities in the region for workforce attraction and recruitment.	Local Community
Advocate for accessible public transport within the region to create better transport opportunities for employees.	Sustainable Workforce Environment
Advocate for short-term accommodation for Hospitality and Tourism workforce to attract, recruit and retain workforce.	Sustainable Workforce Environment

6.5.1 Future State: Actions Methodology

The resultant workforce actions and activities for the future state of the visitor economy in the Phillip Island and San Remo region against the eight key elements

Purpose

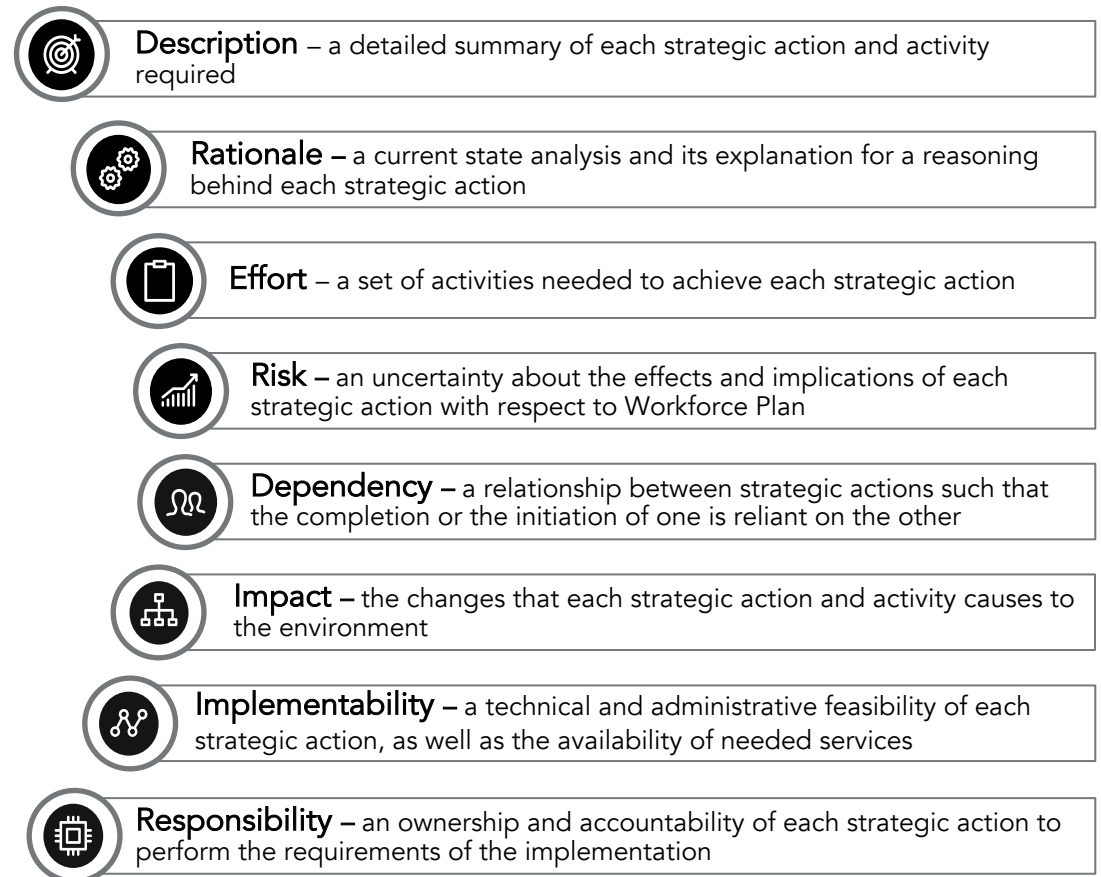
A comprehensive future state analysis was undertaken to identify workforce actions and activities for the future state of the visitor economy in the Phillip Island and San Remo region.

The future state actions utilise the eight key elements that consist of Description, Rationale, Effort, Risk, Dependency, Impact, Implementability, and Responsibility. By evaluating the workforce actions against the eight key elements of the methodology, the workforce goals of the visitor economy is defined in each layers by key industry partners and stakeholders within region during the design-thinking workshop and virtual discussion.

The proposed workforce development initiatives are presented with a high-level assessment of impact and effort. Three categories have been used in relation to implementation effort:

- **Low effort:** implementable in the next 6-12 months;
- **Medium effort:** implementable in the next 2-3 years;
- **High effort:** implementable in 3+ years

Methodology



6.5.2 Future State: Action 1

Action 1 - Create a membership system for Hospitality & Tourism industry providers in the region by offering a benefit card or package to incentivise the partnerships between the local service providers.

GOAL

Unique Value Proposition

PRIORITY AREA(S)



ACTIVITY

- Form a partnership with tourism industry providers within the region.
- Create a membership-based system with benefits or discounts attached that incentivise the partnerships between local service providers.
- Ensure the membership system is renewed each year.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the medium term with some complexities, requiring a **medium effort**.
- The initiative can be implemented in the **next 2-3 years**.

RATIONALE

- The current state analysis have shown that perceived poor working conditions were attached to the tourism industry with its long and unsociable hours.
- In order to make tourism more appealing to workers, it is inherent to create unique value proposition to attract, recruit, and retain employees.

RISK

- There are risks of capital requirements, human capital, project length and continuous marketing to attract partners to participate in the initiative.
- Due to its strong dependency on industry partners, there is a risk of not achieving sufficient number of registrations for the partnership.
- This could negatively affect the feasibility of the membership system.

DEPENDENCY

- There is a dependency on Destination Phillip Island (DPI) to develop and organise the membership system.
- There is a dependency on industry partners to sign-up and join the partnership.
- There is a dependency on industry partners and local community to actively promote it through various marketing streams
- There is a dependency on industry partners to renew their membership on an annual basis

IMPACT

- The membership system will serve as a marketing tool for local industry providers to make Hospitality and Tourism sectors more appealing for employees.
- By offering exclusive discounts and packages, local businesses in Accommodation, Attraction, Food and Beverage sectors are able to provide unique value proposition to its employees, offsetting the downsides of the industry (i.e., long hours, working on the weekend etc).
- The initiative will bring new opportunities for businesses to form a partnership, creating business synergies.
- The initiative will generate **moderate impact** in the Phillip Island and San Remo region.

6.5.2 Future State: Action 1

Action 1 - Create a membership system for Hospitality & Tourism industry providers in the region by offering a benefit card or package to incentivise the partnerships between the local service providers.

GOAL

Unique Value Proposition

PRIORITY AREA(S)



IMPLEMENTABILITY

- The initiative will require a partnership between many local industry providers which might bring some complexities in terms of implementation plan.
- To implement the initiative, it may require a funding support from governmental agencies.

RESPONSIBILITY

- The initiative will be implemented by the Destination Phillip Island (DPI) in collaboration with tourism service providers from the region.
- Destination Phillip Island (DPI) will need to appoint a position who is in charge of this initiative, monitoring and reviewing updates on the membership system, liaising with both employees and employers.

6.5.3 Future State: Action 2

Action 2 - Create a coordinated recruitment platform for the region, allowing industry providers to attract and recruit candidates that match the skills required.

GOAL

Centralised
Workforce
System

PRIORITY
AREA(S)



ACTIVITY

- Utilise currently existing platform (e.g., job board website) to enable job seekers to search for jobs that matches the right skillset.
- Marketing and communications strategy is required to promote the use of the recruitment platform.
- Allowing QR codes for job boards to allow easy access and effective distribution.
- Tourism Geelong, Bellarine and Grampians have launched a centralised platform, "Tourism Jobs Bank 2.0" with an aim of creating a job board and connect right candidates with local providers in the region.

RATIONALE

- The current state analysis have shown that there is a low efficiency of existing recruitment platforms (e.g., SEEK, Indeed, local recruitment agencies) identified in the region.
- There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the medium term with some complexities, requiring a **medium effort**.
- The initiative can be implemented in the **next 2-3 years**.

RISK

- There are risks of capital requirements, human capital, project length and continuous marketing to attract partners to participate in the initiative.
- Without a regular monitoring and review, the recruitment platform could produce a confusion and stress between employers and employees (e.g., not updating already filled in roles).

6.5.3 Future State: Action 2

Action 2 - Create a coordinated recruitment platform for the region, allowing industry providers to attract and recruit candidates that match the skills required.

GOAL

Centralised
Workforce
System

PRIORITY
AREA(S)



DEPENDENCY

- There is a dependency on currently existing platforms or job boards and its efficiency.
- There is a dependency on Destination Phillip Island (DPI) to select appropriate website or tool as the recruitment platform and appoint an individual or team to take a control of the initiative.

IMPACT

- The initiative will serve as a central location for businesses to post job advertisements and employees to find a role that matches their skillset.
- By centralising job advertisements, this will enable potential employees to easily find available jobs within the region.
- The initiative will optimise the efficiency of individual recruitment strategies of local industry providers as well as minimising the gap in skills required.
- The initiative will generate **moderate impact** in the Phillip Island and San Remo region.

IMPLEMENTABILITY

- The initiative will require a partnership between many local industry providers which might bring some complexities in terms of implementation plan.
- To implement the initiative, it may require a funding support from governmental agencies.

RESPONSIBILITY

- The initiative will be implemented by the Destination Phillip Island (DPI) with the support from the State Government of Victoria.
- Destination Phillip Island (DPI) will need to appoint a position who is in charge of this initiative, monitoring and reviewing updates on the job board, liaising with both employees and employers.

6.5.4 Future State: Action 3

Action 3 - Develop a marketing and communications strategy to promote the Phillip Island and San Remo region as a lifestyle destination

GOAL

Unique Value Proposition

PRIORITY AREA(S)



ACTIVITY

- Create a marketing video or content utilising staff testimonials to advertise the Phillip Island and San Remo region as a lifestyle destination to attract workers from overseas, interstate and other areas of regional Victoria.
- Bairnsdale Regional Health created a marketing videos using staff testimonials and attract and recruit labour outside the region.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the short term with low complexities, requiring a **low effort**.
- The initiative can be implemented in the next 6-12 months.

RATIONALE

- Perceived poor working conditions are widely identified within the tourism industries. There is an increasing need for industry partners to offer higher remuneration and unique value proposition to offset the long and unsociable hours (i.e., working on weekends and public holidays).

RISK

- Housing remains a significant challenge for new employees relocating from overseas, interstate and other areas of regional Victoria attracted to the lifestyle aspect of the region.
- This could negatively impact the workforce retention for the visitor economy in the Phillip Island and San Remo region.

DEPENDENCY

- There is a dependency on Destination Phillip Island (DPI) to organise a video content maker and select industry partners to provide staff testimonials.
- There is a dependency on Hospitality and Tourism employees to contribute to the marketing and communications campaign, providing staff testimonials and story-telling.

IMPACT

- The initiative will serve as a marketing tool for all industry providers promoting the Phillip Island and San Remo region as a lifestyle destination, offering unique value propositions to employees.
- The initiative will generate **moderate impact** in the Phillip Island and San Remo region.

IMPLEMENTABILITY

- The initiative can be implemented individually by industry leaders with a low effort required.

RESPONSIBILITY

- The initiative will be implemented by tourism industry partners with some support from Destination Phillip Island (DPI).

6.5.5 Future State: Action 4

Action 4 - Turning casual jobs in the Phillip Island and San Remo region into careers in the Hospitality and Tourism industry.

GOAL

Unique Value Proposition

PRIORITY AREA(S)



ACTIVITY	<ul style="list-style-type: none"> • Create uniform career progression plans for Hospitality and Tourism roles in the visitor economy industries. • Promote and advertise Hospitality and Tourism roles as a career with clear pathway, and skills and training plan. • Improve non-working conditions, such as job variety, feedback and rewards system, flexible work options, career development and empowerment. • Align career development with changing industry needs by offering opportunities that align to staff agility, work-life balance and sustainability. 	EFFORT	<ul style="list-style-type: none"> • The initiative can potentially be implemented (or expanded/promoted) in the short term with low complexities, requiring a low effort. • The initiative can be implemented in the next 6-12 months.
RATIONALE	<ul style="list-style-type: none"> • Younger workforce will be less likely to remain in the tourism industry with the lack of career progression programs and perceived poor working conditions of Hospitality and Tourism roles. 	RISK	<ul style="list-style-type: none"> • Housing remains a significant challenge for new employees relocating from overseas, interstate and other areas of regional Victoria attracted to the lifestyle aspect of the region. • This could negative impact the workforce retention for the visitor economy in the Phillip Island and San Remo region.
DEPENDENCY	<ul style="list-style-type: none"> • There is a dependency on Hospitality and Tourism industry partners to engage with education providers and industry associations to develop a plan and activities to promote Hospitality and Tourism jobs as a career. • There is a dependency on Destination Phillip Island (DPI) to facilitate collaborations between tourism industry partners and education providers to align their career development and progression plans. 	IMPACT	<ul style="list-style-type: none"> • The initiative will serve as a marketing tool for all industry providers promoting Hospitality and Tourism jobs as a career, offering unique value propositions to employees in the region. • The initiative will generate moderate impact in the Phillip Island and San Remo region.
IMPLEMENTABILITY	<ul style="list-style-type: none"> • The initiative can be implemented collaboratively by industry leaders, education providers and industry associations with a medium effort required. 	RESPONSIBILITY	<ul style="list-style-type: none"> • The initiative will be implemented by tourism industry partners with some support from Destination Phillip Island (DPI).

6.5.6 Future State: Action 5

Action 5 - Centralise education providers for skills and training in the region, aligning the purpose of training with a selection of providers

GOAL

Centralised
Workforce
System

PRIORITY
AREA(S)



ACTIVITY

- Undertake audit for required skills and training in the tourism services (Accommodation, Attraction, Food & Beverage).
- Create a requirement for education, skills and training providers to propose their offerings with proposed plans through an official tender.
- Create a centralised plan for skills and training to achieve clearly defined career progression plans to allow consistent training and education for Hospitality and Tourism sectors.
- Improve the quality of education and training through broad use of accreditations from education providers, assuring good training standards across the tourism industry.

RATIONALE

- The current state analysis have shown that there are skills deficiencies and inadequate training options due to lack of education providers in the region.
- Key industry partners have shared that past trainings focused on qualifications rather than skills.
- There is no centralised career plans for Hospitality and Tourism roles, and businesses often select education providers based on previous relationship rather than the benefits or program they offer for the region.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the medium term with some complexities, requiring a **medium effort**.
- The initiative can be implemented in the **next 2-3 years**.

RISK

- There are risks of capital requirements, human capital, project length and continuous effort to engage with partners and education providers to participate in the initiative.
- There will be high costs to these negotiations, small and medium sized enterprises (SMEs) may not afford to participate in the discussions.

6.5.6 Future State: Action 5

Action 5 - Centralise education providers for skills and training in the region, aligning the purpose of training with a selection of providers

GOAL

Centralised
Workforce
System

PRIORITY
AREA(S)



DEPENDENCY

- There is a dependency on Destination Phillip Island (DPI) to liaise with industry partners and education providers to discuss a uniform career plan for Hospitality and Tourism sector roles.
- There is a dependency on currently existing programs, curriculum and accreditations requirements.

IMPACT

- The initiative will enable all industry providers to follow a uniform career progression plan, so that employees will have an opportunity to progress their careers with clearly defined pathways.
- This will increase the transparency of tourism industries in terms of opportunities and career plans.
- The centralised education plan and system will further enable industry partners to select education providers on the basis of the program efficiency rather than qualifications.
- The initiative will generate **high impact** in the Phillip Island and San Remo region.

IMPLEMENTABILITY

- The initiative will require a partnership between industry providers as well as education providers which might bring some complexities in terms of implementation plan.
- To implement the initiative, it may require a funding support from governmental agencies.
- Given the high costs, it would be valuable if industry associations and Destination Phillip Island Tourism (DPI) took lead in the discussions and implementation of the plan.

RESPONSIBILITY

- The initiative will be implemented by the Destination Phillip Island (DPI) in collaboration with education providers from the region.
- Destination Phillip Island (DPI) will need to appoint a position who is in charge of this initiative, monitoring and reviewing education training, liaising with both employees and employers.

6.5.7 Future State: Action 6

Action 6 - Engage with local community groups through partnerships with sport clubs, local schools, social media groups for workforce attraction and recruitment.

GOAL

Local
Community

PRIORITY
AREA(S)



ACTIVITY

- Create a marketing strategy with the use of various social media platforms to engage with different generations of employees (i.e., Facebook, Instagram, TikTok, Twitter etc).
- Develop a partnership and working relationship with local community groups and societies (e.g., local football club, netball club, basketball club) to attract and recruit younger demographic of local employees for the casual roles during the peak season.

RATIONALE

- The current state analysis have shown that there is a low efficiency of existing recruitment platforms (e.g., SEEK, Indeed, local recruitment agencies) identified in the region.
- There is difficulty recruiting casual workforce due to increasing number of applicants who have no intention of taking the role. Having to filter through unfit applicants in order to recruit staff.

DEPENDENCY

- There is a dependency on industry partners to form a partnership with local community groups.

IMPLEMENTABILITY

- The initiative will require a partnership between industry providers and local community groups which might bring low complexities in terms of implementation plan.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the short term with low complexities, requiring a **low effort**.
- The initiative can be implemented in the next 6-12 months.

RISK

- There are risks of capital requirements, human capital, project length and continuous marketing to attract partners to participate in the initiative.

IMPACT

- The initiative will serve as a workforce attraction tool for all industry providers in the Phillip Island and San Remo region to attract a local workforce.
- By forming a long-lasting relationship with local communities, tourism industry providers can benefit from a workforce strategy to recruit and retain skilled workforce.
- The initiative will generate **moderate impact** in the Phillip Island and San Remo region.

RESPONSIBILITY

- The initiative will be implemented by individual industry partners in the Phillip Island and San Remo region.

6.5.8 Future State: Action 7

Action 7 - Engage with the mature age workforce and retired communities from the region for workforce attraction and recruitment.

GOAL

Local
Community

PRIORITY
AREA(S)



ACTIVITY

- Utilise the mature age workforce and retired communities from the region to attract and recruit casual and surge workforce.
- Advocate changes for the pension law to make employment more attractive for retirees.

RATIONALE

- There is an increasing ageing population in the Phillip Island and San Remo region.
- Since most retirees are locals from the region, there is no housing difficulty.
- Most retirees often look for a casual job that offers flexibility and higher rate.

DEPENDENCY

- There is a dependency on industry partners to form a partnership with the retired community.

IMPLEMENTABILITY

- The initiative will require a partnership between industry providers and local community groups which might bring low complexities in terms of implementation plan.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the short term with low complexities, requiring a **low effort**.
- The initiative can be implemented in the next 6-12 months.

RISK

- There are risks of increased exposure to Operational Health & Safety (OHS) incidents.
- There is a cap on how much retirees can earn whilst receiving pension payments.
- There is a potential conflict in work culture with the age gap of employees

IMPACT

- The initiative will serve as a workforce attraction tool for all industry providers in the Phillip Island and San Remo region to attract a local workforce.
- By forming a long-lasting relationship with local communities, tourism industry providers can benefit from a workforce strategy to recruit and retain experienced workforce.
- The initiative will generate **moderate impact** in the Phillip Island and San Remo region.

RESPONSIBILITY

- The initiative will be implemented by individual industry partners in the Phillip Island and San Remo region.

6.5.9 Future State: Action 8

Action 8 - Advocate for an accessible public transport within the region to create better transport opportunities for employees.

GOAL

Sustainable
Workforce
Environment

PRIORITY
AREA(S)



ACTIVITY

- Actively advocate for the Council and other authorities to create accessible public transport in the Phillip Island and San Remo region.
- Provide continuous support for initiatives and projects proposed and implemented (i.e., On-demand Transport Service Plan) by Bass Coast Shire Council.
- Industry partners to invest in public transport options and improvements (i.e., dedicated lane in peak) between Phillip Island and Wonthaggi to facilitate more accessible commute for tourism employees.

RATIONALE

- Majority of the Hospitality and Tourism sector employees come from local and neighbouring areas.
- The low accessibility to public transport imposes a significant challenge for workforce attraction, recruitment, and retention.

DEPENDENCY

- There is a dependency on the development and implementation of On-demand Transport Service Design and Implementation Plan as published in November 2022. Advocacy and engagement with State Government is required.

IMPLEMENTABILITY

- The initiative will require a significant investment from State Government and collaboration with Bass Coast Shire Council which might bring high complexities in terms of implementation plan.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the long term with high complexities, requiring a **high effort**.
- The initiative can be implemented in the **3+ years**.

RISK

- There are risks of capital requirements, human capital, project length and continuous marketing to collaborate with Bass Coast Shire Council.

IMPACT

- The initiative will serve as a workforce attraction, recruitment and retention tool for all industry providers in the Phillip Island and San Remo region.
- By creating an easier access to public transport, employees are more inclined to seek employment in the Phillip Island and San Remo region from other neighbouring areas.
- The initiative will generate **high impact** in the Phillip Island and San Remo region.

RESPONSIBILITY

- The initiative will be implemented by tourism industry partners with some support from Destination Phillip Island (DPI).

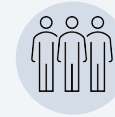
6.5.10 Future State: Action 9

Action 9 - Advocate for short-term accommodation for Hospitality and Tourism workforce to attract, recruit and retain workforce.

GOAL

Sustainable
Workforce
Environment

PRIORITY
AREA(S)



ACTIVITY

- Actively advocate for the State Government, Bass Coast Shire Council and other investors to provide a short-term accommodation for Hospitality and Tourism workforce.
- Provide continuous support for initiatives and projects proposed and implemented to provide workers' accommodation.

EFFORT

- The initiative can potentially be implemented (or expanded/promoted) in the long term with high complexities, requiring a **high effort**.
- The initiative can be implemented in the **3+ years**.

RATIONALE

- Limited supply and the rising popularity of short-term rental accommodation (i.e., Airbnb) has caused decreasing availability and affordability of rental properties in the region.
- House prices in the Phillip Island and San Remo region will continue to grow, worsening the availability of rental accommodation in the future.

RISK

- There are risks of capital requirements, human capital, project length and continuous marketing to attract investors and advocates to participate in the initiative.

DEPENDENCY

- There is a dependency on Bass Coast Shire Council, State Government and other authorities to identify, initiate and implement projects that provide workers' accommodation for Hospitality and Tourism workforce in the Phillip Island and San Remo region.

IMPACT

- The initiative will serve as a workforce attraction, recruitment and retention tool for all industry providers in the Phillip Island and San Remo region.
- By providing greater accessibility and availability to accommodation, tourism industry will have less difficulty attracting, recruiting and retaining skilled workforce.
- The initiative will generate **high impact** in the Phillip Island and San Remo region.

IMPLEMENTABILITY

- The initiative will require a collaboration with Bass Coast Shire Council, State Government and other investors which might bring high complexities in terms of implementation plan.

RESPONSIBILITY

- The initiative will be implemented by Bass Coast Shire Council, State Government and other investors.
- Destination Phillip Island will continue to provide support to achieve the initiative.

6.6 Future State: Actions Summary

The resultant future state analysis of workforce actions and activities required to address emerging challenges and opportunities of the visitor economy in the Phillip Island and San Remo region

Strategic Actions	Attraction	Recruitment	Retention	Skills & Training	Migration	Housing
1. Create a membership system for the tourism sector providers in the Phillip Island and San Remo region.						
2. Create a coordinated recruitment platform for the region, allowing industry providers to attract and recruit candidates that match the skills required.						
3. Develop a marketing and communications strategy to promote the Phillip Island and San Remo region as a lifestyle destination.						
4. Turning casual jobs in the Phillip Island and San Remo region into careers in Hospitality and Tourism industry.						
5. Centralise education providers for skills and training in the region, aligning the purpose of training with a selection of providers.						

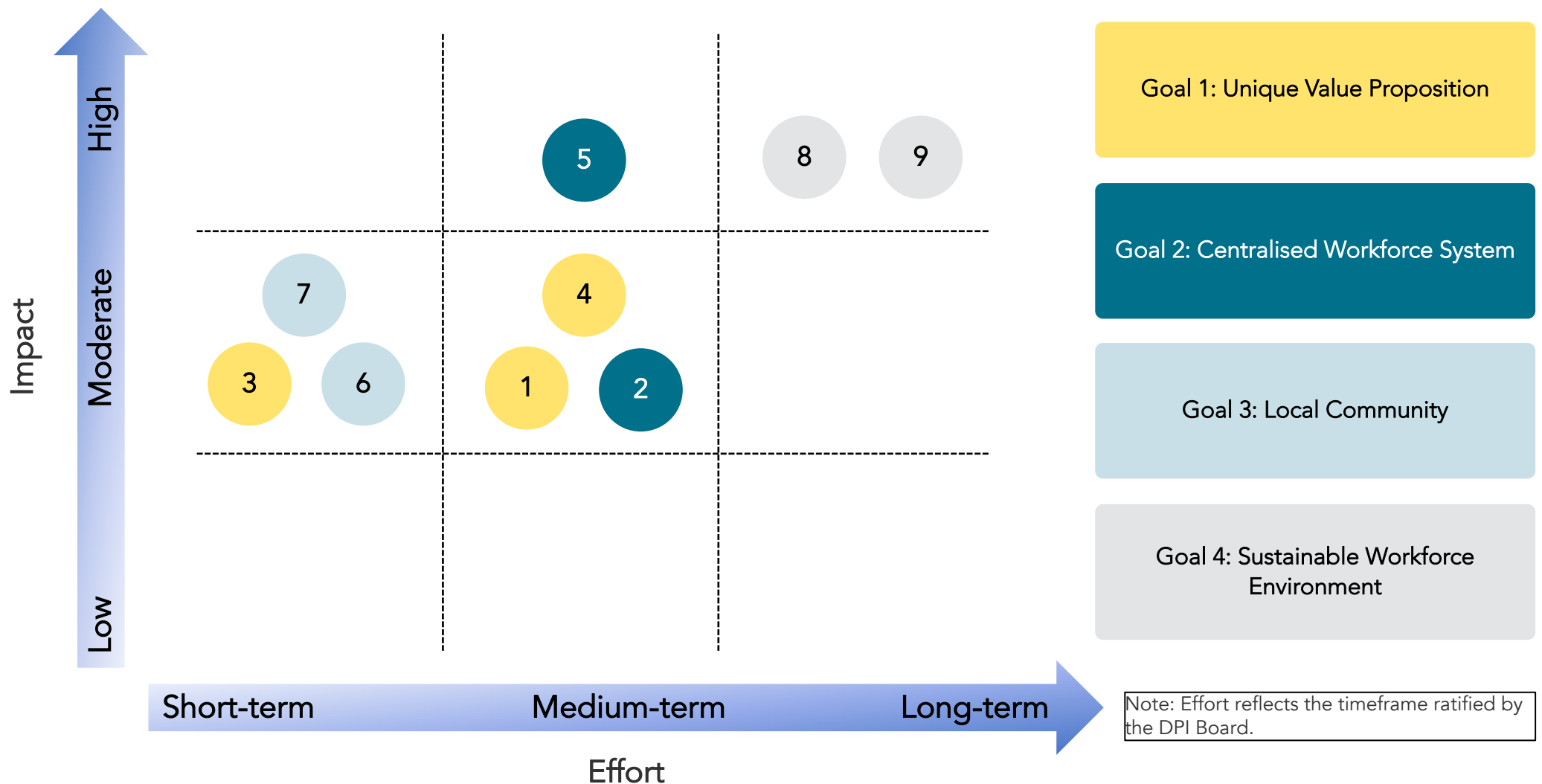
6.6 Future State: Actions Summary (contd.)

The resultant future state analysis of workforce actions and activities required to address emerging challenges and opportunities of the visitor economy in the Phillip Island and San Remo region

Strategic Actions	Attraction	Recruitment	Retention	Skills & Training	Migration	Housing
6. Engage with local community groups through partnerships with sport clubs, local schools, social media groups.						
7. Engage with the elderly and retired communities from the region for workforce attraction and recruitment.						
8. Advocate for an accessible public transport within the region to create better transport opportunities for employees.						
9. Advocate for a short-term accommodation for Hospitality and Tourism workforce to attract, recruit and retain workforce.						

6.7 Future State: Implementation Matrix

The proposed workforce initiatives are presented with a high-level assessment of impact and effort matrix. This assessment identifies actions that are suited for immediate consideration to better support the visitor economy workforce in the region



Appendices

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Appendix A: Consultation Notes

Individual consultations were undertaken as part of the project

DATE

Name: Kimberley Brown
Organisation: The North Pier Hotel

20/09/2022

Consultation Notes:

- Always desperate for staff, having to retain staff all year around to keep surge workforce
- Utilises 15 houses for staff accommodation, facing more challenges as rent prices surge and Airbnb providers increase
- Utilises job redesign and offers rotation between different roles in order to give maximum training and experience for its employees as a retention strategy

DATE

Name: Adam Glass
Organisation: Silverwater Resort

21/09/2022

Consultation Notes:

- Experienced decreasing number of applicants, but still attract both permanent and seasonal workforce
- Utilises shared services of casual workforce with local food & beverage providers in the region
- Utilises employee database to recruit previous employees to recruit seasonal, surge workforce
- Engaged the local community through sponsorship of local sports clubs

DATE

Name: Taylah Fox
Organisation: A Maze N Things

16/09/2022

Consultation Notes:

- Lack of quality applicants as a result of COVID disruptions
- Increasing number of "time wasters" – applicants with no intention of working
- The age demographic of staff is between 15–18-year-olds
- Strong engagement and partnership with local schools (i.e., newsletter, school counsellors)
- Changes in ownership and management due to merge with Holidays Park
- Offers limited accommodation for staff

DATE

Name: John Dickie
Organisation: Wildlife Boat Cruises

20/09/2022

Consultation Notes:

- Lack of training facilities for maritime qualifications around the region
- Lack of internal training for skilled maritime workers
- Difficulty attracting and recruiting skilled workforce due to high demands from other regional areas in Victoria
- Utilises shared services with other cruise operators from other regions during off season
- Utilises local community network and connection (i.e., FB Groups) to arrange accommodation for staff
- Increasing number of "time wasters" from recruitment platforms

Appendix A: Consultation Notes

Individual consultations were undertaken as part of the project

DATE

Name: Amy & Brad

Organisation: Anchor Belle Holidays Park

20/09/2022

Consultation Notes:

- Staff attraction and recruitment is mainly through word of mouth and referrals
- Utilises local community groups for expression of interests
- Increasing number of “time wasters” on SEEK and local recruitment agencies
- Use of poaching strategies to recruit staff within other accommodation providers in the region
- Need to provide career progression and employee benefits (i.e., remuneration package) to retain staff

DATE

Name: Daniel Mock

Organisation: San Remo Hotel Motel

20/09/2022

Consultation Notes:

- No advertising undertaken for staff attraction or recruitment
- All staff are recruited through word of mouth or internal referrals
- Utilises community engagement through multiple affiliations with local sports clubs and local schools
- No staff accommodation issue since most staff are locals
- Sponsors chefs and chefs on Skilled Migrants Visa 457 organically without any advertisements
- Strong focus on training and upskilling existing staff through education and qualifications (partnership with Holmesglen)

DATE

Name: Kally Van Venrooy

Organisation: Phillip Island Grand Prix Circuit

20/09/2022

Consultation Notes:

- Lack of sustainable workforce model
- High success in attracting and recruiting short-term workforce
- Increasing number of “time-wasters”, and often need to filter through applicants to find quality workforce
- No difficulty attracting casual workforce due to high branding and reputation of the organisation

DATE

Name: Panny Letchumanan

Organisation: Phillip Island Chocolate Factory

20/09/2022

Consultation Notes:

- Utilises local recruitment agency to attract and recruit staff
- Offers variety of in-house trainings as well as frequent rotation of jobs to keep staff engaged
- Factory production requires minimal efforts from staff, and hence only need for customer facing roles
- Lack of efficiency and engagement from external educational trainings

Appendix A: Consultation Notes

Individual consultations were undertaken as part of the project

DATE

Name: Sally & Chris

Organisation: Phillip Island Towers

16/09/2022

Consultation Notes:

- There is a low attrition rate due to higher success of retaining majority of staff
- No changes noticed as a result of COVID-19
- Staff attraction and recruitment is mainly through word of mouth and referral network
- No additional advertisements are necessary to attract workers
- Offers work flexibility and remuneration benefits to retain staff

DATE

Name: Peta Wittig

Organisation: Phillip island Nature Parks

21/03/2022

Consultation Notes:

- Having to carry staff throughout COVID-19 to retain surge workforce
- Major change in job design (i.e., fixed-term contractors to permanent part-time)
- Stronger competition for casual and permanent workforce with local tourism providers and remote work employers from Melbourne
- Offering work flexibility and hybrid working arrangements to retain staff
- Increased investments in educational training programs to provide career progression opportunities to staff

DATE

Name: Mirerva Holmes

Organisation: Department of Jobs Precinct & Regions

06/10/2022

Consultation Notes:

- Regional Victoria provides 240 trainees with 12 months of employment with regional business while completing Cert III in Hospitality & Tourism
- \$5.6 million government funding on Accommodation Jobs Program, creating 320 new roles in Hospitality & Tourism services
- \$6.6 million state government funding on Hospitality Workers Pool Project, creating a pool of 500 additional qualified staff in Hospitality

DATE

Name: Sara Quon

Organisation: Sovereign Hill

05/10/2022

Consultation Notes:

- Experienced more staff request on changing casual roles into permanent part-time to ensure stability and security of job
- Utilises community engagement whilst partnering with tertiary education providers, offering internships, traineeships and apprenticeships to Arts, Music and Drama students
- There are decreasing number of quality applicants as a result of COVID-10 disruptions
- Having to lower threshold of required skills to accept candidates
- More focus on "grow your own" workforce

Appendix A: Consultation Notes

Individual consultations were undertaken as part of the project

DATE

Name: Paul Mannix

Organisation: San Remo Fisherman's Co-Op

21/09/2022

Consultation Notes:

- Inability to fully utilise migration pathway to attract quality chefs and cooks from overseas due to requirements for skilled migration 457 visa
- Difficulty attracting quality applicants with the right skillset (i.e., fishermen)
- Increasing number of "time-wasters" on government funded recruitment platforms, such as Jobs Active and Workforce Australia
- Utilises local newspapers and community engagement to attract and recruit local staff

DATE

Name: Anita Cox

Organisation: Peninsula Hot Springs

04/10/2022

Consultation Notes:

- Need to attract at least 200-250 staff for the first year of operation in Phillip Island Hot Springs
- Exploring different options for staff accommodation
- Incorporated community engagement as a new strategy to attract, recruit and retain staff coming out of COVID-19
- Built partnerships with education providers, local sports clubs, smaller recruitment groups, social media groups (i.e., local FB groups)
- Not being able to attract international staff in low-skilled roles due to requirements for skilled occupations list

DATE

Name: Shannan Little

Organisation: Bass Coast Shire Council

04/10/2022

Consultation Notes:

- The Council is working on initiatives to provide sufficient support for young parents
- Sharing casual workforce across different industries and providers could bring complications and complexities around demand for staff (i.e., most providers would request staff during same peak season)

DATE

Name: Adam McDonald

Organisation: Intercontinental Hotel Sorrento

13/10/2022

Consultation Notes:

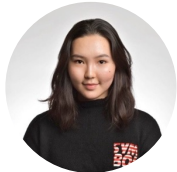
- The hotel doesn't experience trouble attracting, recruiting staff
- Small to medium sized food & beverage providers are struggling to attract, recruit, and retain staff due to low availability of accommodation
- The consortium, including Intercontinental Hotel are exploring options to utilise previously purchased aged-care facility as a staff accommodation

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