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HMAA The peak body for the Australian **Accommodation** Industry

1 February 2007

The Committee Secretary
The Joint Standing Committee on Migration
Parliament House
CANBERRA ACT 2600

By e-mail: jscm@aph.gov.au

Dear Sir/Madam

INQUIRY INTO TEMPORARY BUSINESS VISAS

It is my pleasure, on behalf of the Hotel Motel and Accommodation Association (HMAA), to present this submission on behalf of the Australian Accommodation Industry.

HMAA is the peak national body for the Australian Accommodation Industry, representing a range of accommodation establishments including 5, 4 and 3 star hotels, resorts, motels, motor inns, serviced and holiday apartments, bed and breakfasts, guesthouses, backpackers and time share establishments, combining a membership base of over 2,000 properties and 60,000 guest rooms.

HMAA looks forward to the opportunity to further discuss these matters over the course of this Inquiry and to present to the Committee in session.

Please do not hesitate to contact me should you require any further information.

Yours sincerely

P. Olah

Peter Olah
National Affairs Manager

Hotel Motel & Accommodation Association

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The Hotel, Motel and Accommodation Association

JOINT STANDING COMMITTEE ON MIGRATION

INQUIRY INTO TEMPORARY BUSINESS VISAS

A SUBMISSION BY THE
HOTEL MOTEL AND ACCOMMODATION ASSOCIATION
ON BEHALF OF
THE AUSTRALIAN ACCOMMODATION SECTOR

1 February 2007

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A SUBMISSION BY HMAA ON BEHALF OF THE AUSTRALIAN ACCOMMODATION SECTOR

EXECUTIVE SUMMARY

The Hotel Motel and Accommodation Association (HMAA) appreciates the opportunity to provide this submission to this Inquiry of the Joint Standing Committee on Migration (the Committee).

HMAA is the peak body for the Australian accommodation industry, representing 5, 4 and 3 star hotels, resorts, motels, motor inns, serviced and holiday apartments, bed and breakfasts, guesthouses, backpackers and time share establishments nationally.

This submission addresses the tourism services industry, with a specific focus on the tourism accommodation sector. The positions taken by HMAA are informed by data from a number of public and private sector sources, as well as information from HMAA members.

This data shows that:

- Australia's accommodation businesses are labour intensive;
- accommodation industry employers are experiencing significant difficulties in recruiting and retaining appropriate staff; and
- these problems are striking across the full range of jobs within the industry, whether they be skilled, semi skilled or unskilled.

HMAA believes that addressing these especially complex problems will require a large number of policy and political decisions. The issues (and HMAA's recommendations for potential solutions) fall into several areas including better understanding the problem; capturing the entire domestic labour market; maximising productivity and efficiency; making the industry a more attractive career option; and a focus on industry-based training, education and development.

However, HMAA firmly believes that these approaches must be complemented by a strategy of aggressively competing for overseas sources of skills and labour. It is in this area that this submission primarily focuses.

HMAA looks forward to the opportunity of addressing the Committee regarding the direct and increasing impact of the skills and labour shortage upon the accommodation sector, and of assisting this Inquiry to arrive at commonsense and achievable recommendations for addressing the issue.

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HMAA AND ITS MEMBERSHIP

The Hotel Motel and Accommodation Association is the peak national body for the Australian accommodation industry.

HMAA represents a range of accommodation establishments including 5, 4 and 3 star hotels, resorts, motels, motor inns, serviced and holiday apartments, bed and breakfasts, guesthouses, backpackers and time share establishments, combining a membership base of over 2,000 properties and 60,000 guest rooms.

HMAA is the only organisation representing this full range of accommodation types and interests nationally, and in rural, regional and metropolitan Australia as well as the major cities. HMAA offers a range of services and opportunities which assist accommodation properties and corporate businesses in their day-to-day activities.

HMAA was formed to represent the interests of registered accommodation operators within the Tourism and Hospitality Industry and is registered as an Industrial Organisation of Employers.

HMAA'S UNDERSTANDING OF THE CONTEXT OF THIS INQUIRY

HMAA understands that this Inquiry has been established to consider eligibility requirements and monitoring, enforcement and reporting arrangements for temporary business visas, with particular reference to:

- the adequacy of the current eligibility requirements (including English language proficiency) and the effectiveness of monitoring, enforcement and reporting arrangements for temporary business visas, particularly Temporary Business (Long Stay) 457 visas and Labour Agreements; and;
- areas where procedures can be improved.

HMAA's sectoral interests reside in the tourism accommodation sector, and this submission therefore has a key focus on accommodation. It should be noted that all references to "accommodation" in this document should be taken as referring to short-stay accommodation.

It is with this understanding that HMAA makes this submission on behalf of its members and the accommodation industry across Australia. This submission outlines key concerns of HMAA members and the accommodation sector and makes recommendations for consideration by the Committee, where appropriate. HMAA looks forward to detailing these approaches to the Committee in session.

HMAA'S SOURCES AND USE OF DATA

This HMAA submission has been informed by data and information from a number of public sector, private sector and industry sources, including:

- the Australian Bureau of Statistics;
- Tourism Australia, including Tourism Research Australia;
- the Department of Industry, Tourism and Resources;
- the Sustainable Tourism CRC;
- various state and territory Tourism Commissions;
- The National Tourism Alliance;
- various state and territory Tourism Industry Councils and Alliances;
- EconTech; and
- Manpower Services (Australia) White Paper: *Confronting the Coming Talent Crunch: What's Next?*

HMAA anticipates that the Committee will have ready access to these sources and therefore, for the sake of brevity and readability, has elected not to quote from all this data extensively through this submission. HMAA is of course ready to provide such data supporting its positions if and when required by the Committee.

Additionally, HMAA has utilised information from a number of internal sources including:

- the 2006 Annual Survey of HMAA Membership;
- other HMAA Member and Industry surveys; and
- documentary and anecdotal information from HMAA members and others in the accommodation industry.

Again, HMAA is prepared to provide this information if required by the Committee.

THE TOURISM INDUSTRY: A SNAPSHOT

Tourism is worth $75 billion annually to Australia; it earns Australia more than $18 billion in exports (adding nearly $8 billion to GDP). Importantly, over 75% of the tourism industry is accounted for by domestic tourism. Clearly, a healthy domestic tourism sector is the key underpinning for a sustainable export tourism product.

Tourism is different to most industries: it is highly labour intensive; it requires the input of many service providers into a single "product" to the end consumer; it is dominated by a significant number of small businesses; tourism competes against all other discretionary expenditures for the "hearts and minds" and expenditure of the consumer; it operates in a complex environment requiring significant compliance skills and costs.

Accommodation accounts for approximately 10% of the tourism industry, making it a $7 billion+ industry in its own right. Accommodation is clearly a vital and integral part of the tourism market. Indeed, accommodation and travel are the two unavoidable components of tourism.

Tourism is more labour intensive than most industries, providing over 550,000 direct jobs and nearly 400,000 indirect jobs, including 13,500 new jobs in the last financial year. Tourism is the point of entry for many entrants to the job market and provides significant numbers of jobs in regional communities as well as capitals cities and tourist centres. Accommodation accounts for approximately 100,000 direct jobs in the sector.

The Australian economy has performed strongly in recent times, especially in resource-rich states positively impacted by the global boom in demand for minerals. This has led to fears of a "two-speed" economy with more traditional states, regions and industries lagging, while those exposed to the resources boom show unprecedented strength. It is the position of HMAA that, in the context of a two-speed economy, much of the tourism industry is stuck in the slow lane.

Local consumers have reduced discretionary spending due to high fuel prices and rising interest rates. Additionally, research from Tourism Research Australia suggests that tourism is losing its share of this spend to other expenditures: travel's "share of wallet" has declined from over 16% to just over 13% in the last eight years[1].

In an environment of national (and global) labour and skills shortages, the combination of these factors impacts on the capacity of tourism businesses to attract and retain appropriate staff at all levels: professional, trades, semi-skilled and unskilled. In an industry which places the capacity of its people at the core of the services delivered to its customers, this combination of negative factors is potentially disastrous.

[1] Tourism Research Australia, Per Capita and Nights Per Trip 1985-2005

THE LABOUR SHORTAGE IN THE TOURISM INDUSTRY

The tourism industry is being impacted by a national shortage of (and a consequently increased competition for) labour, as well as a shortage in the supply of staff with industry-specific skills.

Indeed, the most immediate operational issue facing many businesses in the accommodation sector is the difficulty in attracting and retaining appropriate staff. This problem occurs not simply for skilled occupations in limited supply; increasingly, the problem is striking across the full range of positions required in an accommodation business, including semi and unskilled jobs.

It is vital to consider the broader market context in which these problems are growing: the Australian workforce is ageing, with fewer new entrants replace the retiring Baby Boomers. It is projected that the Australian workforce will grow by less than 125,000 in the ten years of the 2020s, significantly lower than the growth rate in each year in recent decades.

The tourism industry has a quite transient workforce, a large proportion of casual staff and "hot spots" of high staff turnover. Increasingly, tourism is seen by many as a "job of entry" to the workforce, rather than a career. Combined with the preponderance of SME's in the industry, and relatively low profit margins, the capacity of the industry to compete for scarce human resources is under real threat.

HMAA is concerned that the debate in this area continues to focus on the skills shortage which is a single (albeit very important) component of the broader problem of a general shortage of labour in many areas of Australia, especially those impacted by the resources boom. This is not to underestimate the vital importance of achieving appropriate training standards and delivery mechanisms for both employees and employers.

It is also of concern to HMAA that the political and policy debate in this area seems to be informed by perceptions driven through three decades of unemployment. HMAA's position is that a more appropriate policy analogy in the current (and coming) circumstance is that of post-World War II Australia, requiring significant inputs of labour - skilled, semi and unskilled - over many years to maintain economic growth.

For many workers, tourism is the "job of entry" into the workforce and therefore, in an environment where new workers are an increasingly scarce resource, tourism is likely to be amongst the most drastically impacted sectors should this issue not be properly addressed.

This is an especially complex problem requiring a number of policy and legislative settings to appropriately address it.

GENERAL INDUSTRY DATA

The current Tourism Satellite Account[2] data shows that whilst tourism directly employed 550,100 people in 2004/05 (5.6% of total employment), the tourism share of total employment fell from 5.9% in 1997/98. The following table shows the number of people employed in each tourism industry sector annually from 1997/98 to 2004/05:

Table 1: People Employed in Tourism

(thousands)	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05
Travel Agency and tour operator services	24.9	25.5	23.9	23.8	23.6	22.0	22.2	27.4
Road transport and motor vehicle hiring	24.1	24.2	23.8	24.5	25.3	25.0	26.2	24.5
Air and water transport	31.0	32.1	34.1	37.8	36.5	33.7	33.4	33.1
Accommodation	**84.4**	**84.2**	**90.3**	**95.6**	**92.8**	**97.3**	**94.2**	**96.2**
Cafes and Restaurants	45.3	46.4	49.0	56.1	54.9	52.8	50.7	51.0
Clubs, pubs, taverns and bars	26.8	26.7	27.4	27.6	26.3	24.2	25.7	29.0
Rail transport	4.0	4.0	3.6	4.1	3.5	3.9	4.2	3.8
Manufacturing	42.2	42.2	44.5	45.8	44.5	45.8	43.4	44.2
Retail trade	141.0	140.2	137.8	133.1	134.4	140.4	140.5	142.6
Casinos and other gambling services	2.5	2.0	2.0	2.0	1.9	1.7	1.8	1.6
Libraries, museums and arts	8.2	8.9	8.5	10.5	10.3	10.3	9.6	10.9
Other entertainment services	14.2	14.5	15.0	14.1	15.4	16.5	16.5	17.1
Education	17.8	19.3	20.7	22.9	23.9	24.6	25.8	24.8
Total for the tourism sectors above	466.5	470.4	480.7	497.8	493.3	499.3	494.2	506.4

[2] Tourism Satellite Account 2004/05

Other industries	42.4	42.5	44.0	39.9	40.5	41.5	42.4	43.7
Total tourism employed persons	508.8	512.9	524.7	537.7	533.7	540.7	536.6	550.1
Total employed persons	8574.6	8638.4	8886.6	9074.3	9207.4	9441.4	9528.0	9743.6
Tourism share of total employment	5.9%	5.9%	5.9%	5.9%	5.8%	5.7%	5.7%	5.6%

Source: Tourism Satellite Account 2004/05

Clearly, the accommodation workforce is considerable, consistent and important. Excluding retail, it is the largest workforce in the tourism industry.

Australian Bureau of Statistics data[3] shows that:

- there are over 5,600 accommodation businesses operating nearly 6,400 accommodation locations around Australia;
- the most common accommodation type is motels with roughly 2,400 locations (nearly 38% of total locations)
- caravan parks have over 1,200 locations and serviced apartments nearly 600 locations;
- licensed hotels have over 500 locations;
- income generated by accommodation businesses is over $8 billion at an average of over $1.4 million per business and an average gross profit margin of 9.7 per cent;
- accommodation businesses with over 50 employees make up only 5.4% of all businesses but generate over half of all income;
- labour costs are the biggest business expense with an average labour cost per employee of $28,800; and
- New South Wales has 32.8 per cent of all accommodation businesses along with the highest share of income and employment, followed by Queensland (25.5%) and Victoria (22.5%).

[3] ABS 8635.0 June 2004

The following table shows ABS/DEWR trend data for the growth of specific tourism and hospitality occupations from 2001 to 2006:

Table 2: Employment Growth in Tourism and Hospitality Occupations

Occupation	Employment May 2006	Growth 2001-2006	
	Thousands	thousands	% pa
Kitchenhands	103.3	2.7	0.5
Waiters	99.4	8.3	1.8
Bar Attendants	54.6	-0.7	-0.2
Chefs	53.9	9.8	4.1
Restaurant/Catering Managers	50.7	-2.2	-0.8
Cooks	35.5	-8.6	-4.2
Taxi Drivers/Chauffeurs	34.6	0.7	0.4
Bus and Tram Drivers	29.3	1.9	1.3
Fitness Instructors/Outdoor Guides	29.3	15.8	16.8
Travel Agents/Tour Guides	25.7	-1.4	-1.0
Hotel/Motel Managers	**21.8**	**-1.6**	**-1.4**
Ticket Sellers/Transport Conductors	16.1	0.7	0.9
Flight/Travel Attendants	12.3	1.4	2.4
Gaming Workers	10.4	4.1	10.5
Other Hospitality/Accommodation Managers	**8.4**	**-1.2**	**-2.6**
Club Managers (Licensed)	6.1	-0.6	-1.9
Ushers, Porters and Doorpersons	6.0	-2.7	-7.2
Hotel Service Supervisors	4.1	-1.1	-4.7
Caravan Park/Camping Ground Managers	4.1	0.2	0.8

Source: ABS Labour Force Survey (DEWR trend data)

As with much of the available tourism workforce data, this information is skewed towards skilled and professional occupations. However, if these figures are accepted, there has been a decline in the two key supervisory/managerial occupational categories in accommodation (shown above in bold), whilst the previous table shows an overall growth in employment in the sector. If both sets of data are accepted as accurate, this reflects growth in employment in accommodation occupations which fall below the "skilled radar".

In a recent Victorian survey[4] 51% of Accommodation, Cafe and Restaurant businesses surveyed reported problems in attracting skilled staff and 59 per cent reported problems in attracting experienced staff.

[4] VECCI Skills Survey 2006

HMAA'S SURVEY DATA

HMAA recently (May/June 2006) undertook a major survey of its membership across Australia. The survey participants included owners, operators, managers and investors in every state and territory of Australia, in CBD, suburban, rural and regional locations, and in every type of accommodation business. The survey captured data about the individual respondent, their business, their operating environment and market, and their attitudes and beliefs. The responding sample was large and statistically valid.

A key question posed in the survey was "which specific issues have caused problems/concerns for your business in the last 12 months?" Respondents were given a large number of options, including a free text option for issues not mentioned, and allowed to mark as many issues as applied to their circumstance. The most cited issue was "fuel prices"; "staff recruitment and/or retention" was the second most cited concern across the industry, mentioned by 37% of respondents.

Importantly, this issue also rated as the second most important issue across all states and territories, and all types of accommodation businesses. Whilst it was cited by a higher percentage of respondents in areas with significant transience in the tourism workforce (for example, Tropical North Queensland) and areas impacted by the resources boom (for example, Western Australia), the issue is clearly a major one nationally.

A more recent survey was conducted by HMAA as a prelude to launching a trial Employer Demand Demonstration Project (EDDP), with the Department of Employment and Workplace Relations (DEWR) in Tropical North Queensland. This survey, conducted across all accommodation businesses in the region in August 2006, showed the real impacts of the labour shortage in a region with an economy dominated by tourism.

Some of the key results from this survey are shown below:

Table 3: HMAA/DEWR Tropical North Queensland Survey of Labour Market Issues

Have you had difficulties in recruiting staff over the last 12 months?	
Yes	82%
No	18%
Don't know	0%
Do you have a high turnover of staff (above 20% in the last 12 months)?	
Yes	47%
No	53%
Don't know	0%

For which positions have you had difficulties in recruiting staff? (tick all that apply)	
Administration staff	5%
Chefs/cooks	41%
Food and beverage staff	41%
Kitchen hands	5%
Maintenance staff	11%
Reception staff	5%
Room attendants	52%
Supervisory staff/managers	11%
Have not had staff recruitment difficulties	5%
Other	5%
For which positions have you had difficulties in retaining staff? (tick all that apply)	
Administration staff	0%
Chefs/cooks	17%
Food and beverage staff	29%
Kitchen hands	5%
Maintenance staff	5%
Reception staff	11%
Room attendants	41%
Supervisory staff/managers	5%
Have not had staff retention difficulties	23%
Other	5%
Which of the following have caused problems in recruiting/retaining staff? (tick all that apply)	
Lack of applicants	70%
Lack of experience	52%
Lack of formal training	29%
Location	29%
Poor customer service skills	17%
Poor people skills	11%
Staff not motivated to work	52%

Wages and conditions offered	5%
Have not had staff recruitment/retention difficulties	5%
Other	17%
Do you currently have job vacancies?	
Yes	41%
No	59%
If you have job vacancies, in which positions do you have vacancies? (tick all that apply)	
Administration staff	0%
Chefs/cooks	28%
Food and beverage staff	42%
Kitchen hands	0%
Maintenance staff	28%
Reception staff	28%
Room attendants	57%
Supervisory staff/managers	28%
Other	14%

Whilst this survey had both a limited sample size and geographic coverage (and therefore would not be statistically valid across the broader Australian Accommodation Industry), it does show three trends very clearly:

- accommodation sector employers are experiencing significant difficulties in recruiting and retaining appropriate staff;
- an unusually high percentage of these employers have current vacancies; and
- these problems are striking across the full range of jobs within the industry, whether they be skilled, semi-skilled or unskilled (in fact, the largest problem for this sample appears to be in the lowly skilled "room attendant" category). This reality is at odds with the persistent focus on a "skills shortage", rather than a broader "labour shortage".

NON-MIGRATION SOLUTIONS TO THE LABOUR SHORTAGE

HMAA has made a submission to the current Inquiry by the House of Representatives Standing Committee on Employment, Workplace Relations and Workforce Participation into workforce challenges in the Australian tourism sector, and asks that this submission be read in conjunction with that made to the House Committee.

In that submission, HMAA argued that the evident and growing skills and labour shortage will most severely impact tourism and other labour intensive service industries with little capacity to compete on pay against booming resource-based industries. The submission further argued that a complex and difficult problem such as this needed to be addressed on a number of fronts and through a significant commitment across numerous areas of policy, Government administration, and industry practice.

Amongst the area specifically considered were:

- the lack of timely, publicly funded and broadly available operational data in the accommodation sector, and the lack of data covering many tourism industry occupations;
- the need to structure Welfare to Work and other programmes in a way which maximises their relevance to employers, and ensures the fullest possible capture of local human resources as a vital and necessary component of a properly structured response to the labour shortage issue;
- the fact that in an environment of increasing demand for a static or diminishing pool of skills and labour, the maximising of productivity from each employee, and the achievement of the highest standards of workplace efficiency, are vital to profitability and sustainability in service industries which have both a large and mobile workforce and narrow profit margins;
- the need for a strategic approach to improving the perception of the tourism industry as an employer and an industry in which to build a career; and
- the need to focus on increasing the link between tourism industry employers and training organisations., whilst also considering opportunities to improve the capacity and knowledge of tourism industry managers and employers.

However, HMAA's submission to the House Committee Inquiry also argued that these approaches must be complemented by a strategy of proactively and aggressively competing for overseas sources of skills and labour. HMAA believes that it is in this context which any review of Business Visa programmes should be considered.

MIGRATION SOLUTIONS TO THE LABOUR SHORTAGE

All these workforce challenges for the tourism industry, and the broader Australian economy, occur within a global context marked by ageing populations in virtually all advanced economies, together with increasing competition between these economies for people with scarce, globally portable skills. There are clear markers that the range of skills becoming the subject of this global market is widening, and spreading to semi skilled and even unskilled labour.

HMAA believes that much valuable work has been undertaken in recent times by the Department of Immigration and Multicultural Affairs to simplify and liberalise the processes for accessing overseas staff with the required skills (such as changes to Working Holiday visa requirements). However, it is still difficult and costly for SME's across the tourism industry to access the skilled staff they require, and more needs to be done. Areas which warrant specific consideration include:

- the Migration Occupations in Demand List (MODL) remains quite unresponsive to market and industry needs. It is also highly inflexible with a focus on traditional trades, and by its very structure unable to accommodate the flexible job requirements which are at the core of the tourism industry;

- students and working holidaymakers are an important source of labour across tourism: however, the 20 hour work per week limit makes it difficult for both students and employers to maximise this benefit and should be reviewed;

- it is wasteful to require graduating tertiary students to return home immediately, especially in cases where the completion of their studies, together with experience and knowledge gained through work placement, makes them most effective as an employee. Consideration should be given to offering students with the required skills the opportunity to apply locally for permanent residency and to seek longer working visas; and

- 457 (employer sponsored) visas are utilised by many tourism employers, but are limited by the salary threshold which is unrealistic for many tourism jobs. This threshold should either be generally reviewed or set at different levels for different industries.

However, even with the successful implementation of the initiatives outlined above, the data suggests that Australia's workforce gap will be too great to meet utilising only local sources of labour. Therefore, consideration must be given to how Australia will enter the global market for semi skilled and unskilled labour.

Within the Asia-Pacific Region, major nations such as Japan, the USA and Canada have begun competing in this market. They will be joined by most of the industrialised nations of Asia in the next 10-15 years. Australia must compete globally, but must make it a priority to be a dominant player within the labour market in our own region. In these emerging regional and global markets for skills and labour, first mover advantage will be critical.

As mentioned above, HMAA holds significant concerns that the political debate in this area is constrained by perceptions driven through three decades of unemployment. HMAA's position is that a more appropriate policy analogy in the current situation is that of post-World War II Australia, requiring significant inputs of labour over many years to maintain economic growth. In less than thirty years following the Second World War, Australia encouraged more than 3.5 million (generally lowly skilled) migrants to come here. The hard work and ambition of these people became the bedrock of the nation's remarkable growth and strength over two generations.

HMAA firmly believes that this track record of success can be a pointer to future success. A regionally based programme, offering semi skilled and unskilled workers from the Pacific island nations and selected Asian nations (and then more broadly from target regions in Europe, the Americas and elsewhere) the opportunity to enter and work in Australia for several years, acquire skills and qualifications, pay taxes, and eventually to repatriate their skills and accumulated capital to their home nation would appear to benefit all parties.

Australia gains the workers needed to continue our economic growth and protect our standard of living; Australian employers get access to the staff they need to stay in business and grow without the bureaucratic need for direct sponsorship; the worker and their home country gain skills, qualifications and capital which will build their quality of life and that of their entire community.

Recommendations:

1. That the Inquiry consider changes to the Migration Occupations in Demand List (MODL) to promote market responsiveness and flexibility.
2. That the Inquiry consider whether the 20 hour work per week limit for overseas students should be increased.
3. That the Inquiry consider whether appropriately experienced graduating overseas students should be offered the opportunity to apply locally for permanent residency and to seek longer working visas.
4. That the Inquiry consider options for industry specific wage thresholds for 457 visas.
5. That the Inquiry consider the legislative and administrative requirements, programme structure and design, promotion and funding of an Asia-Pacific region focussed, medium-term visa programme for semi skilled and unskilled labour.
6. That the Inquiry consider methods and structures for a campaign to educate the Australian community about the looming labour and skills shortage, its potential negative impacts, and the requirement for a suite of solutions to address the problem.