



Tourism and Hospitality Workforce Survey Report

Deloitte Access Economics
South Australian Tourism Commission

August 2021

Introduction: survey and approach

TOURISM AND HOSPITALITY WORKFORCE SURVEY

Deloitte Access Economics was engaged by the South Australian Tourism Commission (SATC) to develop and field a survey of tourism and hospitality businesses in South Australia (the survey). The survey was designed to:

- Bring together **insights into workforce challenges** – including staff shortages, recruitment challenges, retention challenges, or a lack of appropriate skills – their impact, and incentives and strategies of South Australian tourism and hospitality businesses
- Provide a shared industry and government understanding and alignment of the **key workforce challenges and the extent of their impact** on the tourism and hospitality industry to enable a co-ordinated, cohesive and collaborative response
- Identify the extent to which businesses are offering incentives and/or applying **strategies to address or minimise the impact of workforce challenges**, and an understanding of the relative effectiveness of potential strategies
- Provide an industry perspective on how they believe they could best be supported by **potential government incentives, solutions or strategies** in relation to attracting and retaining skilled workers.

The survey was fielded during May and June 2021. This was a period of high volatility in South Australia and nationally due to changing restrictions in response to the ongoing COVID-19 pandemic. Survey results should be interpreted in this context.

A more detailed outline of the survey contents is available in Appendix A, while further information on the profile of eligible participants and sample sizes is included in Appendix B.

APPROACH



Australian Tourism Data Warehouse (ATDW)

The ATDW provided the baseline business and contact information for fielding the survey to self-nominated South Australian tourism and hospitality businesses.



Distribution partner workshop

The distribution partners engaged were key individuals from a targeted selection of South Australian and national entities that would build interest, confidence and involvement in the survey within their particular business communities. The distribution partners, including a range regional and sectoral specific representatives, were reputable advocates for the survey and were critical to achieving the required sampling.



Survey fielding

The survey was conducted via an online Qualtrics hosting platform. Businesses listed with the Australian Tourism Data Warehouse (ATDW) and distribution partners were emailed individual links to the survey along with a description of its purpose and privacy recognition.



Spreadsheet dashboard and headline report

This report, underpinned by detailed dashboard of the survey dataset, presents the key insights into the state of employment in the tourism and hospitality sector in South Australia.

Introduction: workforce challenges

Workforce challenges are being felt across all South Australian regions, ranked as a top 3 challenge by over two thirds of businesses in the tourism and hospitality sector.

STAFF SHORTAGES

- A majority (55%) of South Australian tourism and hospitality businesses are short of staff.
- This increases to **63%** when only **employing businesses** or those defined as 'wanting to employ'¹ are considered. This cohort is the focus for the reporting henceforth.
- **43% of businesses are restricting their operations** in some manner due to staff shortages, most typically by **reducing the frequency of experiences or services offered, or by reducing opening times.**
- Staff challenges have translated to real **reductions in revenue** with 1 in every 2 businesses reporting a loss of greater than 5%.

RECRUITMENT

- Nearly 7 in 10 hiring tourism and hospitality businesses (**68%**) surveyed are having challenges with recruitment.
- From the perspective of employers, the key barrier to recruitment is the **low level of applicants**, identified by **89%** of respondents as a significant or moderate barrier. Businesses perceived **poor attitude of applicants** as the next most important barrier (80%).
- For respondents trying to recruit, the process is often long and may be fruitless: **under half** of nearly 1,000 positions advertised in the preceding 6 months were filled at the time of the survey, with 30% of those taking **more than a month to fill.**

RETENTION

- **Over a third (37%)** of South Australian tourism and hospitality businesses surveyed reported experiencing retention challenges.
- **Unreliability of employees** was a key retention challenge identified by employers, noted as a significant or moderate barrier by **69%** of respondents. The food and beverage sub-sector cited particular issues with reliability of employees, **77%** noting it as a significant or moderate barrier.
- The next most often cited significant or moderate barrier was **job offers from businesses in other industries (64%),** especially for the attractions and tours sub-sector (72%).

SKILLS AND EXPERIENCE

- Almost **6 in 10 businesses (58%)** responded they were facing a **lack of appropriate skills, qualifications or experience.**
- Employers once again identified employee attitude as a challenge, with **74% citing 'attitude or aptitude ill-suited to role' as a significant or moderate barrier.**
- **71%** of respondents with skill barriers cited being 'unable to attract appropriately skilled workers due to **business location**' as a significant or moderate barrier. This increased to **88%** for businesses outside the metropolitan commute region.

¹ Business are considered as 'wanting to employ' if they have identified themselves as non-employing businesses (sole traders) but have indicated that they are experiencing one or more workforce challenges. The employing or wanting to employ group is referred to as the hiring group, and is the focus group for the reporting.

Survey summary

Overview of workforce challenges and their impact

Overview of workforce challenges

68% of all businesses and 77% of the hiring group reported experiencing one or more workforce challenges.

Labour force challenges are pressing and widely prevalent across the sector:

- More than two thirds of all businesses (68%) are experiencing workforce challenges.
- When looking at both employing businesses and those 'wanting to employ' (the hiring group), three quarters of businesses (77%) report they are experiencing one or more workforce challenges. Henceforth, the reporting focuses on the outcomes of the 'hiring group' of businesses.
- Across the state, 74% of respondents view staffing as one of their top three business challenges. For 27% of businesses, staffing challenges were identified as their most critical challenge.
- Considering the key workforce challenges - shortages, recruitment, retention, and skills:
 - 63% of hiring businesses identified as experiencing staff shortages
 - 68% of hiring businesses struggle with recruiting
 - 58% of hiring businesses have challenges with the level of skills, qualifications and experience of workers
 - 37% of hiring businesses face retention issues.

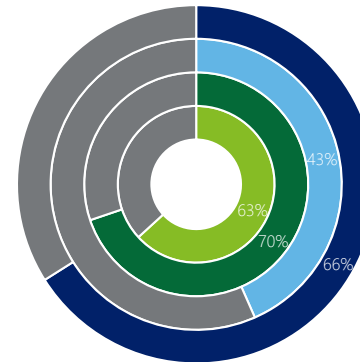
A challenge for the city and the regions:

- The profile of labour force challenges is similar for the Adelaide metropolitan region and regional South Australia (SA), though exacerbated somewhat in Adelaide. In Adelaide, skills challenges are a more prevalent issue, cited by 66% of businesses – 10 percentage points higher than the regional SA outcome. Retention challenges were also reported as more prevalent in Adelaide than regional areas.

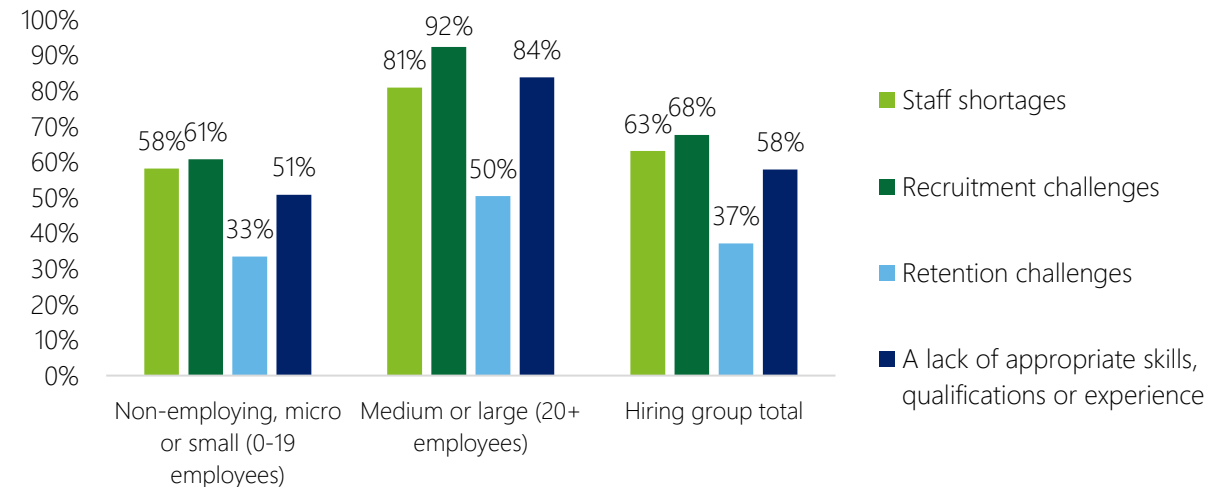
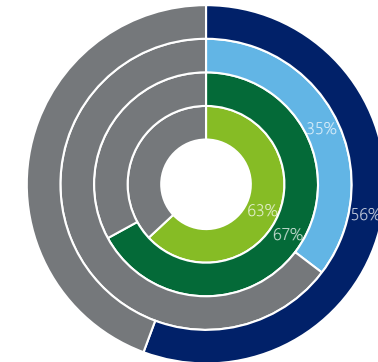
Size matters:

- While workforce issues are faced by businesses of all sizes, challenges are more prevalent in medium to large sized businesses (i.e. those with 20 or more employees). Around 9 in 10 medium to large businesses have had troubles recruiting, this is compared to 61% of micro to small businesses with recruitment challenges.

Prevalence of workforce issues
Adelaide metropolitan



Rest of South Australia



Source: Tourism and Hospitality Workforce Survey 2021

Note: non-employed in the chart above only includes those within the hiring group, wanting to employ

Overview of workforce challenges

While the extent of the challenges differs across regions, it is clear that tourism and hospitality sector workforce issues are a significant challenge to businesses across the state.

Recruitment challenges top the list across the state:

- For each region presented, recruitment challenges are the most pressing, affecting the highest share of businesses.
- Considering the share of businesses reporting workforce challenges, the Limestone Coast and Eyre Peninsula, Yorke Peninsula and Flinders Ranges and Outback regions are the two regions showing the highest prevalence of staff shortages, recruitment challenges and retention challenges. Challenges relating to skills, qualifications and experience of applicants and employees are most prevalent in the Adelaide and Adelaide Hills regions.
- A lack of applicants with appropriate skills, qualifications or experience was reported as a key challenge for the Adelaide and Adelaide Hills grouped region, outranking staff shortages. This is also true for the Riverland and Murray River, Lakes and Coorong region, though the incidence is lower.

Distance from Adelaide:

- Considering whether a tourism region is within reasonable commuting distance from Adelaide, South Australia can be broken into the 'Greater metropolitan' region (or within commuting distance) and the rest of the state. For this analysis, Adelaide, Adelaide Hills, Barossa and Fleurieu Peninsula tourism regions are considered within the Greater metropolitan region.
- Viewed in this manner, there is a marked uptick of staff shortages, recruitment challenges and retention challenges outside the broader commuting region of Greater metropolitan.
- Conversely, challenges in the level of skills, qualifications and experience of workers is equivalent in the greater metropolitan region and the rest of the state, indicating this challenge is less associated with commuting distance from Adelaide.

Share of businesses facing workforce challenges by region

Region	Staff shortages	Recruitment challenges	Retention challenges	Skills challenges
Adelaide & Adelaide Hills	56%	62%	36%	60%
Barossa & Clare Valley	56%	59%	28%	41%
Eyre Peninsula, Yorke Peninsula, & Flinders Ranges and Outback	59%	63%	39%	45%
Fleurieu Peninsula & Kangaroo Island	49%	50%	28%	45%
Limestone Coast	63%	65%	39%	54%
Riverland, and Murray River, Lakes and Coorong	47%	57%	23%	54%
Regional SA	54%	58%	30%	48%

Share of businesses facing workforce challenges by commuting distance from Adelaide

Region	Staff shortages	Recruitment challenges	Retention challenges	Skills challenges
Greater metropolitan	51%	56%	30%	51%
Rest of state	59%	62%	35%	51%

Source: Tourism and Hospitality Workforce Survey 2021.

Note: Tourism regions have been grouped due to sample size constraints.

Overview of workforce challenges

Businesses without labour challenges

Profile of businesses:

23% of businesses identified as experiencing no workforce challenges. Relative to the total profile of respondents these businesses show the following characteristics:

Sub-sectors



Food and beverage services businesses are more likely to be experiencing workforce challenges than other sub-sectors, with only 13% of businesses reporting no labour challenges. In contrast, 34% of attraction and tour businesses face no challenges.

Business size



Within the hiring group of businesses, 29% of micro and small businesses do not face any labour challenges. In comparison, only 5% of medium and large businesses face no challenges, with 95% facing at least one labour challenge.

Region



Businesses in the Fleurieu Peninsula are the most likely to report they are facing no labour challenges, with 39% of hiring businesses in the region not facing labour challenges. In contrast, Kangaroo Island and the Limestone Coast are the most likely to face at least one labour challenge.

Free text analysis of most critical challenge responses – businesses with and without labour challenges*

Respondents who said workforce issues were not their most critical challenge (but may have been in their top three challenges) were asked to describe their most critical business challenge. Among these descriptions, respondents frequently referred to COVID-19, lockdowns, interstate border closures and high uncertainty.

Among businesses who had indicated workforce challenge, staff-related concerns, such as hiring, training or paying for staff, featured prominently. For businesses without workforce challenges, cancellations and sales were more prominent.

Key challenges for businesses with at least one workforce challenge



Key challenges for businesses without workforce issues



* Note: Question posed was 'What is the most critical challenge your business is facing? This does not need to relate to staffing challenges. Please use a short phrase or description.' This was not asked if staffing challenges were ranked 'most critical challenge'. Responses above include those with and without other labour challenges identified.

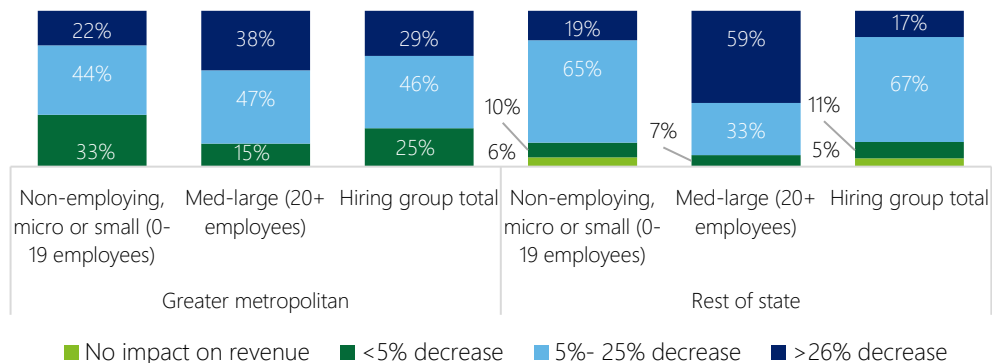
Impact of workforce challenges

43% of businesses reported they were restricting business operations as a result of workforce challenges.

Staffing challenges are translating to business disruptions

- Overall, 43% of 'employing or wanting to employ' businesses reported they were restricting business operations as a result of the workforce challenges.
- Considering the distance from Adelaide lens, businesses outside of the greater metropolitan region are more likely to have brought in restrictions in response to labour challenges, comprising just under half of the hiring group in the rest of SA (47%).
- Across the regions, reduced frequency of experiences offered is the most commonly implemented restriction, varying from 38-56% of businesses restricting their operations. This is followed by restrictions to opening hours and to opening days.
- By business employment size, micro sized businesses are least likely to be restricting their operations.
- Of the businesses restricting their operations, only a small minority report this is not affecting their bottom line: for the largest proportion of respondents, restrictions are leading to a 5-25% decrease in revenue.

Revenue impact for businesses restricting operations



Source: Tourism and Hospitality Workforce Survey 2021

Note: non-employing in the chart above only includes those within the hiring group, wanting to employ

Share of businesses restricting operations by most common restriction methods and region

Region	Restricting operations	Reduced opening days	Reduced opening hours	Reduced frequency of experiences offered
Adelaide & Adelaide Hills	39%	36%	38%	47%
Barossa & Clare Valley	48%	20%	28%	43%
Eyre Peninsula, Yorke Peninsula, & Flinders Ranges and Outback	53%	34%	51%	56%
Fleurieu Peninsula & Kangaroo Island	43%	37%	24%	39%
Limestone Coast	51%	42%	46%	42%
Riverland, and Murray River, Lakes and Coorong	18%	50%	38%	38%
Regional SA	46%	35%	34%	46%

Share of businesses facing workforce challenges by commuting distance from Adelaide

Region	Restricting operations	Reduced opening days	Reduced opening hours	Reduced frequency of experiences offered
Greater metropolitan	39%	31%	35%	41%
Rest of state	47%	37%	38%	49%

Source: Tourism and Hospitality Workforce Survey 2021

Note: Tourism regions have been grouped due to sample size constraints

Sector snapshots

Snapshots of revealed workforce challenges and sector specific outcomes

Issues snapshot: Extent, barriers and strategies

STAFF SHORTAGES AND RECRUITMENT

AVERAGE NUMBER OF ADDITIONAL WORKERS WANTED

	Small business (1-19 emp)	Med to large (20+ emp)
Full time	0.6	2.0
Part time	0.4	1.7
Casual	1.9	8.1

ADVERTISING CHANNELS



CURRENT STRATEGIES

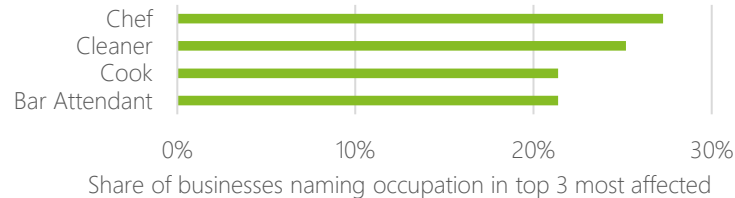
- Over 40% of businesses are using alternative or additional advertising channels to address staff shortages
- 40% of businesses have adopted specific strategies or offered incentives to improve recruitment outcomes
- The most effective strategies for recruitment reported were offering more hours, on-the-job training and higher salaries

STAFF RETENTION

PERCEIVED BARRIERS

Barrier	Extent ¹
No or limited career options	54%
Competing job offers	51%
External factors	47%
Employee not a good match or unhappy	46%

MOST AFFECTED OCCUPATIONS



CURRENT STRATEGIES

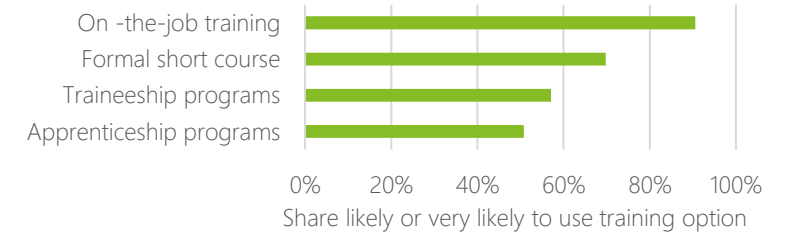
- 58% of businesses have adopted specific strategies or offered incentives to improve retention outcomes
- The most effective strategies reported were more regular hours, on-the-job training, and higher salaries
- Accommodation support strategies were cited as the least effective

SKILLS, QUALIFICATIONS AND EXPERIENCE

PERCEIVED BARRIERS

Barrier	Extent ¹
Lack of skilled workers	72%
Lack of or limited experience	51%
Lack of access or quality of training	39%

INTEREST IN EMPLOYEE TRAINING OPTIONS



CURRENT STRATEGIES

- 67% of businesses have adopted specific strategies to increase the level of skills, qualifications or experience of staff
- The most effective strategies reported were more flexible work arrangements, formalised internal training, and automation of business operations

Source: Tourism and Hospitality Workforce Survey 2021

Notes: Statistics relate to only those businesses that identified as experiencing each workforce challenge. (1) expressed as percentage of businesses reporting issue as significant or moderate barrier

Sector snapshot: Accommodation

Prevalence of workforce challenges

74% of businesses reported experiencing one or more workforce challenges

Restricting business

37% of businesses reported they were restricting business operations as a result of workforce challenges

Impact of workforce challenges

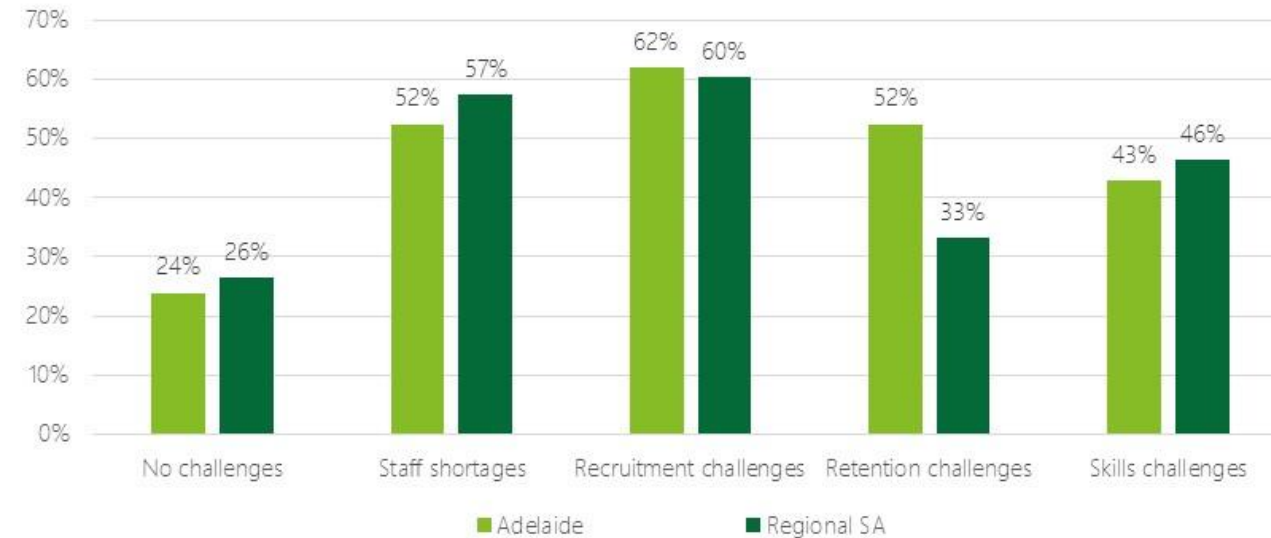
53% of businesses reported a decrease in revenue of more than 5% due to workforce challenges

Share of businesses adopting strategies or incentives

47% to improve recruitment outcomes

64% to improve retention outcomes

Share of accommodation businesses facing workforce challenges by region



Source: Tourism and Hospitality Workforce Survey 2021

BARRIERS TO RECRUITMENT

- Low level of applicants (93%)
- Attitude of applicants (79%)
- Applicants are not based locally (68%)
- Applicants are inexperienced (67%)

EFFECTIVE STRATEGIES

- Offer on the job training, higher salaries or more hours

BARRIERS TO RETENTION

- Poor employee commitment (73%)
- Leaving for personal reasons (65%)
- Job offers from businesses in other industries (56%)

EFFECTIVE STRATEGIES

- Offer job training or mentoring support, higher salaries or more regular hours

BARRIERS TO ATTRACTING SKILLS

- Attitude or aptitude ill-suited (78%)
- Business location (77%)
- Lack of sector experience (60%)

EFFECTIVE STRATEGIES

- More flexible work arrangements, formalised internal training, and automation of business operations

Source: Tourism and Hospitality Workforce Survey 2021

Notes: Share of businesses experiencing the workforce challenge, reporting issue as significant or moderate barrier

Sector snapshot: Food and beverage

Prevalence of workforce challenges

87% of businesses reported experiencing one or more workforce challenges

Restricting business

45% of businesses reported they were restricting business operations as a result of workforce challenges

Impact of workforce challenges

49% of businesses reported a decrease in revenue of more than 5% due to workforce challenges

Share of businesses adopting strategies or incentives

40% to improve recruitment outcomes

54% to improve retention outcomes

Share of food and beverage businesses facing workforce challenges by region



Source: Tourism and Hospitality Workforce Survey 2021

BARRIERS TO RECRUITMENT

- Low level of applicants (90%)
- Attitude of applicants (86%)
- Mismatched skills of applicants (83%)
- Applicants are unqualified (78%)

EFFECTIVE STRATEGIES

- Offer on the job training, higher salaries or more hours

BARRIERS TO RETENTION

- Poor employee commitment (77%)
- Job offers from businesses in other industries (70%)
- Leaving for personal reasons (67%)

EFFECTIVE STRATEGIES

- Offer job training or mentoring support, higher salaries or more regular hours

BARRIERS TO ATTRACTING SKILLS

- Attitude or aptitude ill-suited (75%)
- Business location (68%)
- Lack of sector experience (57%)

EFFECTIVE STRATEGIES

- Formalised internal training, automation of business operations, and encouragement to undertake external training

Source: Tourism and Hospitality Workforce Survey 2021

Notes: Share of businesses experiencing the workforce challenge, reporting issue as significant or moderate barrier

Sector snapshot: Tours and attractions

Prevalence of workforce challenges

66%

of businesses reported experiencing one or more workforce challenges

Restricting business

54%

of businesses reported they were restricting business operations as a result of workforce challenges

Impact of workforce challenges

49%

of businesses reported a decrease in revenue of more than 5% due to workforce challenges

Share of businesses adopting strategies or incentives

30% to improve recruitment outcomes

50% to improve retention outcomes

Share of tours and attractions businesses facing workforce challenges by region



Source: Tourism and Hospitality Workforce Survey 2021

BARRIERS TO RECRUITMENT

- Low level of applicants (85%)
- Mismatched skills of applicants (84%)
- Applicants are inexperienced (75%)
- Applicants are unqualified (66%)

EFFECTIVE STRATEGIES

- Offer on the job training, higher salaries or more hours

BARRIERS TO RETENTION

- Job offers from businesses in other industries (72%)
- Job viewed as short term option (65%)
- Expired visa (64%)

EFFECTIVE STRATEGIES

- Offer job training or mentoring support, more hours or more regular hours

BARRIERS TO ATTRACTING SKILLS

- Lack of sector experience (68%)
- Business location (65%)
- Attitude or aptitude ill-suited (62%)

EFFECTIVE STRATEGIES

- Formalised internal training, automation of business operations, and encouragement to undertake external training

Source: Tourism and Hospitality Workforce Survey 2021

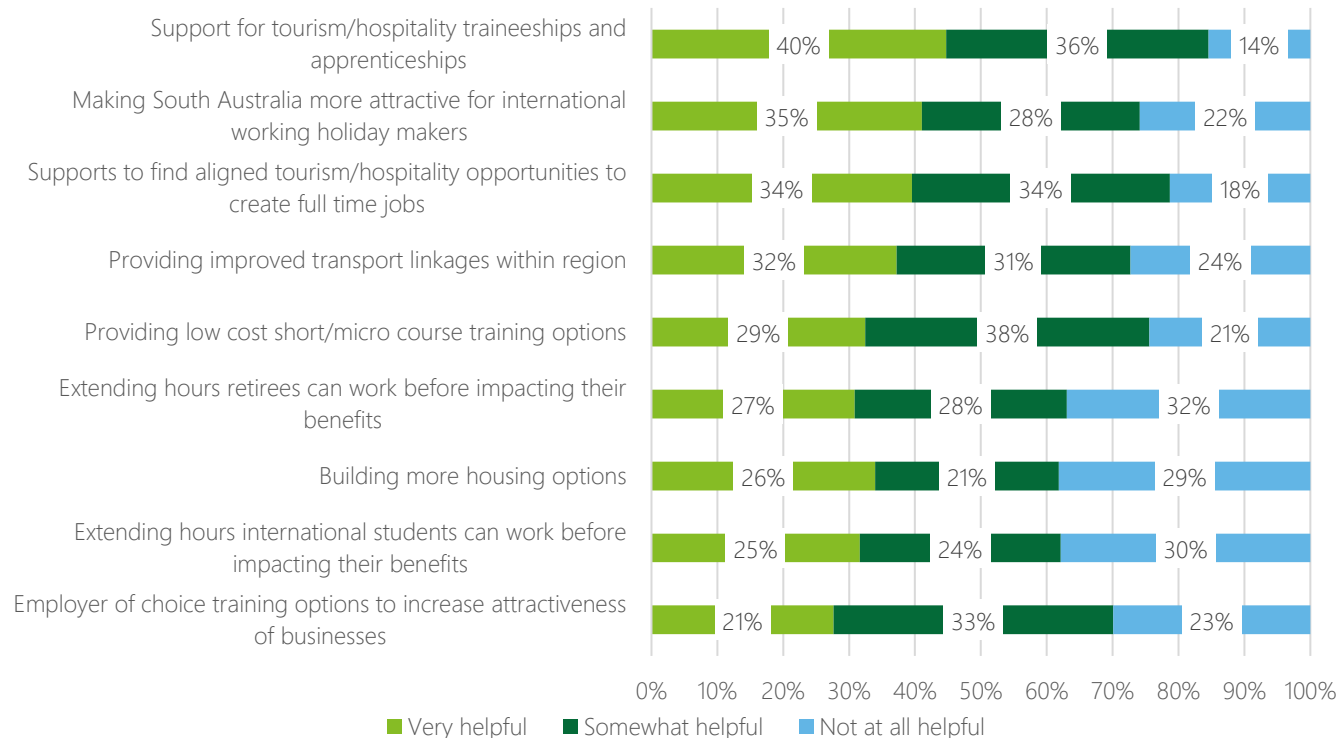
Notes: Share of businesses experiencing the workforce challenge, reporting issue as significant or moderate barrier

Snapshot: future considerations

AVERAGE ANNUAL GROWTH OUTLOOK FOR PAID EMPLOYEES

	Short term	Medium term	Long term
Small business (1-19 emp)	1.5%	1.9%	2.2%
Med to large (20+ emp)	2.5%	2.8%	2.9%

Perceived effectiveness of potential solutions or strategies



Source: Tourism and Hospitality Workforce Survey 2021
 Note: this view excludes those participants who responded 'unsure.'

HIGHEST PRIORITY SOLUTIONS AND SUPPORT

Theme 1: Accommodation (39 mentions)

"Our area currently has no vacant rentals and most hospitality businesses (that aren't into accommodation) appear to be in the same position as us. The only reason we have not built our own staff accommodation is the time frame required for council approval and then at present trying to then find a builder that has time for your build within 12 months - virtually impossible."

"The single biggest issue is the extreme shortage of suitable worker accommodation available..."

"Housing, hard to find rentals in town which is seeing people leave the region"

"More local accommodation."

Theme 2: Training (36 mentions)

"Low cost training courses"

"If I could offer apprenticeship for a less than full time role I would. (E.g. apprentice chef 25 hours per week not 38 per week)"

"Short course pricing accessible and cost effective for businesses to send staff to."

"Training in regions"

"low cost short courses for upskilling and retraining options for rural areas"

Theme 3: Tourism career perceptions (30 mentions)

"Making hospitality an attractive and appealing career choice rather than a part time consideration on the way to pursuing another profession."

"Creating incentive for people to see hospitality as a profession."

"Changing the perception of hospitality - for far too long has the hospitality industry been seen as one of the only options for drop outs, misfits, naughty kids and people who are not sure what they want to do in life."

"Marketing of the industry as a industry that you can have long term career in"

"Appropriate training and incentives to make the hospitality sector more attractive to youth so they see it as a viable career path."

Other notable themes :

"Reduce hurdles and complexity to attain visas."

"International students! Letting them back in will be the quickest way to solve current issues"

"increase childcare places and reduce cost of childcare"

"Decrease the cost of those visas for small, family owned business[es]"

"Bring in backpackers and overseas students"

"Improve cost of transport to regional areas."

"Make the regional areas more attractive to potential candidates through incentives"

"Assisting Small Businesses in regional areas to employ the young people in the communities."

Source: Tourism and Hospitality Workforce Survey 2021

Note: Other notable themes: international workers (24), visa settings (14), attractiveness of the regions (12), transport (10).

Appendices

Appendix A: Survey instrument outline

 **Survey**
 Online
 Individual links to targeted businesses and distribution partners

 **Survey timing**
 10 to 20 minutes, dependent on number of workforce challenges

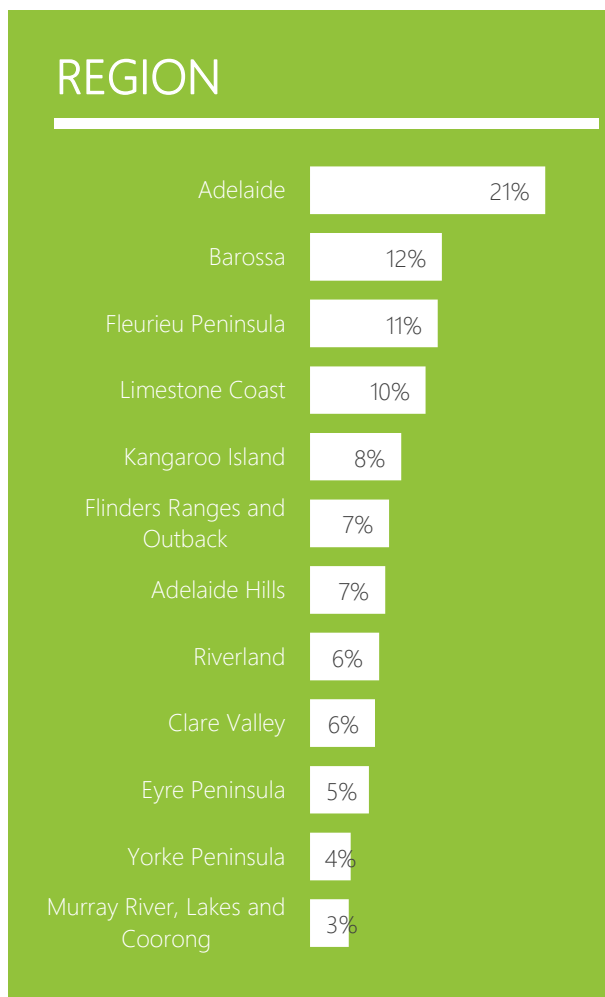
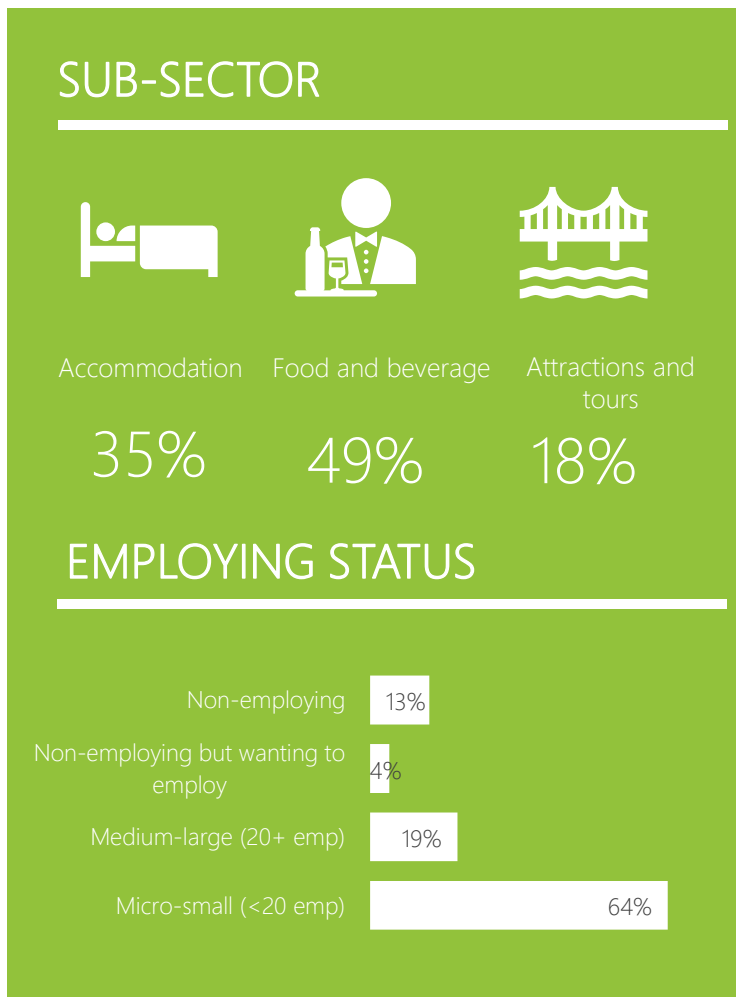
 **Fieldwork timing**
 May-June 2021

 **Sample**
 Representative sample of South Australian tourism and hospitality businesses

Survey section	Information targeted
Eligibility	<ul style="list-style-type: none"> Screening questions to ensure respondent represents a South Australian tourism and/or hospitality business
Business information	<ul style="list-style-type: none"> Profiling information such as location, business size, seasonality, and sub-sector of operations
Experience of labour force challenges	<ul style="list-style-type: none"> Identification of labour force challenges and underlying business behaviours and decisions regarding staff shortages, recruitment, retention and training
Staff shortages	<ul style="list-style-type: none"> Profile of staff shortages, including breakdown by full time, part time and casual status and practices for advertising positions and sourcing employees.
Recruitment	<ul style="list-style-type: none"> Identification of barriers to recruitment, sources of labour used, and business decisions and behaviours in relation to recruitment (e.g. advertising channels, incentives for employment, key occupations with recruitment challenges etc.)
Retention	<ul style="list-style-type: none"> Identification of barriers to staff retention, and business decisions and behaviours in relation to retention (e.g. provision of training and clear career development, incentives for employees, key occupations with retention challenges etc.)
Skills, qualifications and experience	<ul style="list-style-type: none"> Identification of perceived causes of skills shortages or development challenges, and business practices in relation to skills development or other initiatives to improve the quality of staff
Future staffing considerations	<ul style="list-style-type: none"> Considerations for future staffing, including business and/or government initiatives or supports to help address labour force challenges

Appendix B: Profile of survey participants

The Tourism and Hospitality Workforce Survey received n=556 eligible and valid responses.



Sample size summary

Tourism Research Australia (TRA) business count data reveals there were around 18,000 tourism businesses in South Australia in 2019.¹

The Australian Tourism Data Warehouse business database provided a relevant initial sample of just under 6,000 businesses that would reliably represent the aggregate targeted population. Additionally, businesses were targeted through the support of distribution partners; peak bodies, and regional and industry representatives enlisted to communicate and generate buy-in from businesses to participating in the survey.

As a result of the comprehensive coverage of the population, the resultant survey sample profile was observed to be reasonably reflective of population as represented in the ATDW database.

Based on the response rates achieved, the three major sub-sectors (accommodation, attractions and tours, and food and beverage services) may all be reported. The results for the accommodation and food and beverage services sub-sectors have a margin of error of 10%, while results for the attractions and tours sub-sector have a margin of error of 15%.

The results for all employing business sizes (as defined by employee numbers) may be reported with a 15% margin of error, with the exception of large businesses. For this reason, Deloitte has grouped medium and large businesses, and micro and small businesses for the purpose of reporting.

The results for all regions but those from Eyre Peninsula, Murray River, Lakes and Coorong and Yorke Peninsula may be reported with a 25% margin of error, with a lower margin of error of 15% achieved for the Adelaide metropolitan tourism region, and 20% for Barossa, Fleurieu Peninsula, Limestone Coast and Kangaroo Island. As sample sizes are lower within branched workforce challenges (e.g. recruitment challenges respondents only), the tourism regions are grouped to provide a robust and reliable analysis framework.

The sampling constraints above are based on a consistent (and conservative) sample proportion estimate of 0.5 across all regions.

¹ Tourism businesses in Australia: June 2014 to 2019. Available at: <https://www.tra.gov.au/data-and-research/reports/tourism-businesses-in-australia-june-2014-to-2019/tourism-businesses-in-australia-june-2014-to-2019>

Limitation of our work

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