

Australia's Kitchen Talent Review

The food industry's reset and rebuild:
Lessons learned from the pandemic and priorities
for fostering the next generation of culinary talent.

November 2021



A SEAT AT THE TABLE



Morten Belling

Managing Director
Menulog ANZ

Welcome to this report investigating the state of play in Australia's food services industry, reviewing the impact of the pandemic and gaps among our homegrown kitchen talent requiring concentrated attention. With the support of Lonergan Research, we surveyed more than 500 owners and managers of food services venues and businesses across the nation for their thoughts on the difficulties faced, specific skills gaps and hopes for the future of the industry to ensure its growth and prosperity.

Menulog partners with more than 36,000 restaurants across Australia and New Zealand, and we feel proud of our role in enabling many businesses to stay connected to their communities throughout the COVID crisis. While we all have felt so isolated for so long, our grasp of the value of local businesses and local jobs has grown deeper than ever. Being able to play a role in keeping restaurants cooking throughout the pandemic has made us incredibly proud and we're thankful to all of our valued customers that continued to use the Menulog service in support of their local hospitality community.

We saw such a huge increase in the need for delivery services from restaurants and other businesses throughout the pandemic that we too had to continue to innovate in ways we could support. In the initial stages, we rapidly increased internal resources to be able to onboard and service new partners seeking delivery services to continue to operate, while introducing commission relief packages in both Australia and New Zealand. We educated our customers on new safety initiatives, including contact-free delivery and incentivised them through millions of dollars in marketing investment to continue to order from local businesses.

We expanded our programs to recognise and reward partners in one of the toughest periods the hospitality industry has seen, revamping our 'Local Legend' partner benefit program and our annual restaurant awards, and also expanded this support to partners outside of hospitality, including a new partnership with OzHarvest. This saw us commit more than \$100,000 towards its food relief efforts in line with orders via Local Legend restaurants.

As Australia's only homegrown on-demand food delivery business, we are committed to giving back to the industry and supporting its resilience and growth. Our mission is to ensure Menulog plays a strong role as an enabler for great food experiences across Australia. Part of that mission is promoting and encouraging the next generation of kitchen talent, so I hope we can continue to raise the profile of programs like the National Indigenous Culinary Institute to see the growth of indigenous chefs in Australia's elite kitchens, and to nurture new leaders that inspire others to follow in their footsteps. We invested an initial \$100,000 in NICI in 2021 which is assisting NICI improve internal operations and the infrastructure around its programs, along with strengthening its existing NSW and VIC programs, while expanding into South-East QLD. We are continuing to work with NICI on its expansion, and will use the size and scale of our Menulog partner network to help place indigenous chefs into employment and support our partners with potential employees, in a critical time for the industry.

We look forward to the next year as venues across the nation adapt to our 'new normal', and look forward to this research report sparking conversation around a fruitful path forward for restaurateurs, culinary professionals and food lovers everywhere.

CREATING PATHWAYS FOR MORE CULINARY CAREERS IN AUSTRALIA



Nathan Lovett

CEO
National Indigenous Culinary Institute

The hospitality sector is at a critical crossroads as it seeks to bounce back from the disruption of the pandemic. At a time when the industry is experiencing a widespread skills shortage, it's the perfect time to review how we can better facilitate local talent into the sector.

The food services sector presents excellent career opportunities, with chef training delivering a range of professional skills spanning creativity, effective communications, resilience and leadership. A culinary career should be appealing to more Australians, and a key ingredient for driving interest in the sector is creating pathways for our youth and regional communities to enter into the industry and be well supported and mentored.

At NICI, we are dedicated to creating pathways for aspiring indigenous chefs to undergo apprenticeship training in Australia's highly regarded restaurants. Our program has created pathways over the past 10 years for Aboriginal and Torres Strait Islander people to gain meaningful, guaranteed, ongoing employment with our partners and reaching Executive Chef, Head Chef and Sous Chef positions. The hospitality sector requires greater homegrown talent in our kitchens, and engaging those part of our indigenous, marginalised or remote communities – with a passion or interest in cooking – is one critical avenue in helping solve our skills crisis, bolster our food sector's future, as well as create greater employment opportunities for all. There are roles we can all play – spanning private education, industry and government – in getting our youth inspired by the career path and building the next generation of homegrown culinary talent more broadly.



Wes Lambert

CEO
Restaurant & Catering Industry Association of Australia

The world has been through a one in a hundred-year challenge and our industry has been one of the hardest hit by the crisis. Many businesses did not make it, while those that did will be managing the fallout well into 2022 and beyond. It's a testament to the hardworking teams at restaurants, cafés, catering services and takeaways all across Australia that they have maintained their love for an industry that isn't just about food. It's about shared moments and community, and the joy great food can bring when you get together with friends and family.

Restaurant & Catering Industry Association of Australia is a proud partner of this survey. I hope the insights create a moment for us to pause and think about the way we have responded to this crisis, and most importantly, triggers us to move forward with a sense of purpose for the future of every food service professional and those who want to enter into this great industry in the years ahead. Setting the best conditions for success for every owner and every apprentice should be our greatest priority.

A special thank you to all Australians who have kept on supporting local restaurants while the curtains were closed. By using an app and ordering local cuisine for delivery or pick up, you played a vital role in keeping the industry alive. It's exciting to be getting back together at the table and hearing laughter and conversation float across our venues once again.

INTRODUCTION

As the Australian food services industry rebuilds, lessons of the past year will play a vital role in protecting the sector in the future. Many initiatives helped keep hospitality businesses afloat during the pandemic, and now the industry seeks focused, collaborative attention on building the nation's kitchen talent. That's the verdict of over 500 food services industry leaders, who are ready to get our restaurants, cafés, catering firms and takeaways back on their feet for the long-term.

In a research report on the impacts of the pandemic on the industry, food services industry owners and managers (FIOMs) from across the country shared their insights on job losses, venue closures, the future of careers in the industry, reliance on international culinary talent and the role delivery services played in keeping kitchens running. The industry also shared its thoughts on promoting pathways for indigenous chefs and the creative and inspiring reasons why they recommend the industry as a career.

The research report reveals that

half of all Australian FIOMs surveyed had to permanently close at least one venue during the pandemic, with more than one quarter closing two or more. On average, 2.2 staff were lost from these businesses per each key position in the kitchen – chef, cook and apprentice. Approximately nine in ten (89%) said food delivery services have helped keep their businesses afloat through the crisis.

A total 91% of industry leaders surveyed say there has been an over-reliance on international chefs to run Australian kitchens, with 59% believing there is a shortage of local chefs nationally. An extraordinary 99% see great benefits from the reliability and long-term commitment local culinary staff bring to their businesses, and 67% would like to see greater support for career pathways for local trainees and apprentices.

The research also reveals a great passion for the industry remains at the heart of these businesses, with 96% continuing to recommend a career in the food services industry. A total 95% of surveyed FIOMs believe the industry would benefit from skilled programs like the NICI, which creates opportunities for indigenous talent in Australia's top restaurants, as the sector seeks to reset and rebuild post the pandemic.

91%
say there has been an over-reliance on international chefs in Australian kitchens

49%
believe there is a shortage of local chefs

50%
had to close at least one venue

89%
say food delivery services helped keep their businesses alive

ABOUT THE RESEARCH

This industry research was conducted amongst 541 Australian restaurant, café, and catering business owners and managers. The survey was distributed throughout Australia including both capital city and non-capital city areas. The survey was conducted online between 24 September and 18 October 2021 with participants drawn from members of a permission-based panel and the member database of R&CA. The research was commissioned by Menulog and conducted by Lonergan Research in accordance with the ISO 20252 standard.



STAFF AND VENUES FEEL THE BITE

The troubles for all storefront industries have been well documented over the course of the pandemic but hearing the direct impact on food industry owners and managers (FIOM) we surveyed across the country remains a difficult story to hear – yet there are positive signs behind the numbers.

Two-thirds of FIOMs surveyed had to let go of local (66%) and international chefs (68%) during the pandemic.

On average, FIOMs had to let go of at least two kitchen staff at every level – this included chefs, culinary professionals yet to be chef qualified, as well as chef apprentices and trainees. While one-third of venues lost three or more kitchen staff per each of these positions. Conversely, almost three-in-ten FIOMs were able to maintain existing staffing levels through the past 18 months.



Restaurants were the most likely to have laid off a local chef with over three quarters (78%) needing to let go at least one, while takeaways were the most resilient but still seeing over half (52%) of all those surveyed reducing kitchen staff.

Beyond staff levels, half (50%) of FIOMs surveyed had to close at least one venue with over one quarter (29%) closing two or more. Even in the states that were not as deeply impacted by lockdowns, the lack of tourism movement may have contributed to closures. In the Northern Territory and Tasmania, three out of five FIOMs surveyed needed to close a venue.

Across types of venues, takeaways were the most resilient of the fixed venue FIOMs with just one-third (34%) needing to permanently close a location, while cafés were the hardest hit (62%), followed by restaurants (53%) and club/pubs (46%).



LOCAL AND INTERNATIONAL CULINARY TALENT – RESETTING THE SCALES

As we carefully re-emerge from the impacts on the industry, there are important lessons to be learned in better nurturing local talent in the kitchen and reducing a reliance on international chefs bolstering the numbers in Australian food services.

Half (49%) of FIOMs surveyed believe their business has felt a shortage of local culinary professionals, while 59% see a shortage for the industry at a national level.

Victorian FIOMs were the most likely to say they felt there is a shortage (60%) with South Australia the least likely at 35% seeing a shortage.

An overwhelming

91% of FIOMs surveyed believe Australian reliance on international chefs has left the industry exposed during the pandemic,

and the related border closures. 19-in-20 (95%) owners and managers who were themselves still chefs saw this as a problem for the local industry.

At the same time, 98% of FIOMs surveyed believe there are benefits to having international chefs on staff. Four out of five (81%) owners and managers who had no culinary training of their own believed that international chefs brought new ideas to their kitchens. One in two FIOMs felt international chefs bring greater experience, though this was a view held more strongly in capital city respondents (57%) than regional areas (33%).

Almost all (99%) see specific benefits to having local staff – seeing reliability (56%), longevity with the business (56%), and knowing local tastes (55%) as the biggest reasons for hiring local. The vast majority (80%) of FIOMs would like at least 60% of their staff to be locally trained.

FUELING APPETITE FOR CULINARY CAREER PATHS

So the question the industry is grappling with remains – what are the problems getting in the way of growing local staff levels?

As professionals, FIOs certainly believe in the career path.

Almost all (96%) of those surveyed recommend a career as a chef, with creativity (47%) and getting to see people enjoy your creations (46%) as the top factors in pursuing this career.

While 41% of FIOs see the opportunity to become your own boss as a good reason to become a chef.

One in two (50%) FIOs suggest there's a bigger opportunity for industry and government in helping Australia's hospitality sector thrive for the long-term, now moving beyond the short-term fixes necessary amid the pandemic. It is important to note that following the survey period for respondents (24 September – 18 October 2021), the NSW Government has announced¹ 3000 free training places across courses at TAFE NSW and other registered training providers, including safe food handling and cooking courses, among other beverage services programs. This initiative adds to the

existing Smart and Skilled reform² which offers government-subsidised courses for skills in demand, including commercial cookery.

Interestingly, another perceived reason for the culinary skills shortage is the reputation of long and unsocial hours (43%). Female FIOs felt most strongly about the reputation of unsocial hours (55%) compared to 38% of male FIOs.

One in two (51%) FIOs see education and training as critical for helping to overcome the shortage. An overwhelming 96% of FIOs surveyed agree that building career pathways for local, homegrown chefs is important to the future of the industry, with uniform agreement across all food service sectors and regions.

As part of the Australian Government's response to COVID-19, it is providing free or low-fee training courses across the nation through an extension of its JobTrainer Fund³ by a further 163,000 places. Covering various identified skills, from health, aged and disability care through to IT and trades training where professional cooking courses are included. This is in addition to the Boosting Apprenticeship Commencements program⁴, which supports more than 170,000 new apprentices and trainees. With these incentives available, it's important the food services sector capitalises and works to ensure a fair portion of these programs' recipients undergo culinary skills training.

- 1 NSW Government, [Free hospitality training caters for skills gap](#), 31 October 2021
- 2 NSW Government, [Smart and Skilled](#)
- 3 Australian Government, Skills Reform, [JobTrainer Fund](#)
- 4 Australian Government, Budget 2021-22, [Creating jobs and rebuilding our economy](#)

ABOUT NICI

NICI offers training and experience to aspiring indigenous chefs. Originally designed by Neil Perry, Guillaume Brahimi, Michael McMahon, Jill Dupleix, Terry Durack and Barry McDonald, NICI's program combines industry qualification with unique on-the-job training opportunities. With over 70 chefs employed through partner restaurants, the program aims to produce a group of chefs trained in Australia's top restaurants who will become role models and leaders for future indigenous trainees.

NURTURING OPPORTUNITY FOR INDIGENOUS CULINARY TALENT

As part of the efforts to grow local opportunities comes an extremely valuable opportunity to develop indigenous talent in Australia's professional kitchens. Through organisations like the NICI, pathways are being nurtured into some of the finest kitchens in the country.

Looking closely at initiatives like NICI, 69% of FIOs surveyed were aware of this program prior to contact, with 30% knowing exactly what NICI is and 13% having had one of their trainees on staff.

Beyond direct awareness and engagement, 94% of FIOs surveyed feel their business would benefit from skilled programs like this, and 95% agreed the whole industry benefits. Nine out of ten (91%) support greater investment into NICI and other skilled programs.

The most recent Australian Government data¹ shows that between 2007-08 and 2018-19, the overall employment rate for indigenous Australians dropped from 54% to 49%. In 2020, the National Agreement on Closing the Gap was developed, targeting that by 2031, the proportion of indigenous youth in employment, education or training should reach 67% (up from 57%). It also targets 62% employment among 25-64 year old indigenous Australians (up from 51%).



It's also outlined that food services and accommodation is the fifth most common industry of employment for working age Indigenous Australians at 8.5%, with healthcare, construction, public administration and retail trade the leading sectors respectively. Therefore there is ample opportunity for the representation of indigenous Australians in the country's professional kitchens, to grow.

"I'm glad to see that close to a third of the industry's owners and managers are aware of NICI, yet there's much opportunity for this figure to grow and for many more restaurants to embrace aspiring indigenous chefs. It's important we create pathways for our indigenous communities to enter into a culinary career with equal opportunity and close mentorship."

NATHAN LOVETT, NICI CEO

1 Australian Government, Australian Institute of Health and Welfare, Indigenous Employment, 16 September 2021

FEEDING A STRONGER FUTURE

Even the food services businesses that have survived the pandemic have been operating in a reactive mode throughout the crisis, making it difficult to take steps to look to the future and plan for what's next. And finding extra funds to invest in their businesses will be a struggle for some time to come.

Nine in ten (90%) FIOs say international border closures have had a significant impact on their ability to attract and retain chefs, and the same percentage are confident that as borders reopen international chefs will return.

A significant 92% of FIOs surveyed would like to see investment in chef apprenticeships and traineeships to drive greater interest in the career path, with more than half of these respondents pointing to greater support that helps drive completion of training. This indicates the industry, government and education providers all have key roles to play in not only driving interest in culinary careers, but ensuring trainees are supported, fully complete their training and are successfully facilitated into employment.

DELIVERING A LIFELINE IN A CRISIS

With closures and limits on dining capacity a major feature of the past 18 months, finding other ways to keep the kitchens running has been essential to the survival of the sector through this time. And across the industry, FIOs recognise the benefits of delivery services in keeping businesses from closing during the pandemic.

Nine in ten (89%) of FIOs surveyed say delivery services have helped keep their business afloat since the start of the pandemic, with 97% saying it has now become a key part of the food services industry.

Almost all (96%) of FIOs feel that it would be good if delivery services that have benefitted from lockdowns gave back to the industry.

This year, Menulog committed significant investments and tailored programs to both NICI, helping to extend its training program, as well as OzHarvest, in support of its food relief efforts. In 2020, Menulog also halved commissions on pick up orders across its restaurant partners nationally and did the same in NZ this year, helping incentivise consumers to support their favourite local restaurants while in lockdowns. The business worked closely with the R&CA to help advocate for restaurants and the broader hospitality industry during its most difficult time, developing new ways to help keep businesses operating and hospitality staff in jobs.



Survival has been at the heart of the food services industry throughout the pandemic, and unfortunately not every business has made it. However, the past year has also proven the economic and social importance of restaurants, cafés, and takeaways in our lives. These are key venues where milestones are celebrated and communities come together, as well as important sources of income and livelihoods. It's now time to reflect and act through building a pipeline of local culinary talent, and future-proofing the industry for many years to come.

investing in the development of Australia's courier workforce, trialling an employee courier model, which aims to create greater security and entitlements for couriers, whilst maintaining the flexibility we know is so important. This trial is a very important first step in gaining meaningful learning and insight to help inform the next phase of Menulog's plan, which is to successfully apply for a new

PREPARING A WAY FORWARD

The industry recognises the value provided by delivery services in keeping the stoves running in kitchens across the country. When the people couldn't come to the chef's table, delivery has made it possible to take the chef's creations direct to the people. In just one year¹, Menulog experienced a 42% growth in its regional restaurant partners, with the on-demand delivery provider rapidly onboarding restaurants so they could keep the lights on during lockdowns.

And it's also been important for delivery services to continually innovate, improve and help food businesses in providing an excellent customer experience during the pandemic. That's why Menulog has created more than 500 new roles in NSW over the next 12 months, bringing its entire Customer Service department in house. Its restaurant partners and their customers will benefit from even greater support and rapid progression of their enquiries. They also require growing support in managing on-demand deliveries, and Menulog is

modern industry award that is fit for purpose for the on-demand food delivery industry. The industry craves greater support to help it get back on its feet, and to build better pathways for local kitchen talent, so we can develop the next generation of creativity and leadership without needing to rely on overseas staff to run Australian restaurants.

With clear recognition from owners and managers that programs like NICI can also bring more indigenous talent to the fore, it's a great time to reflect on how the industry can use this rebuilding phase to promote and encourage the food services industry as a place where creativity and inspiration can flourish, and to ensure it is a career path accessible to all, for the long-term.

There is an opportunity for all leaders and organisations that have influence in the food services sector to help enact positive change - from the industry's partners, education providers to government and current culinary professionals. If all of these parties collaborate and work together in unison with the R&CA, the future of Australia's culinary talent will be a force to be reckoned with.

¹ Menulog data, June 2020-June 2021

NICI GRADUATE STORIES

Nurturing an aspiring chef's career through NICI

Malarie Webster joined the NICI through a recruitment agency and completed the group's first Skills for Success program. This led her to working in high profile restaurants such as Café Sopra, Green Dream and Fratelli Fresh.

Malarie had a difficult life growing up and carried trauma into her adulthood. The NICI provided her with mentoring, cultural support and also professional counselling services to help her successfully complete a chef apprenticeship.

Soon after becoming a qualified chef, Malarie moved to the Mudgee area where she had experience working at Mudgee RSL, Di Lusso Estate, Wirrakirri Café and finally Pipeclay Pumphouse, of which she works today.

Malarie has gone on to complete her Diploma in Hospitality Management and also a Certificate in Business Administration, continuing her education journey as she continues to grow and develop as a chef.

During May 2021, Malarie was Chef in Residence for the Djinida Ngardak Culinary Careers Camp, teaching 20 indigenous students from around NSW for a week-long program, and leading the Gala Dinner's catering with the students. She has a love for teaching and is hoping to one day transition to becoming a commercial cookery educator at TAFE.

Malarie credits her time with the NICI as "lifesaving" and would not be in the position she is today without the organisation's support as well as its Alumni program initiatives.

The Bourke brothers undergo NICI apprenticeship at Rockpool Bar and Grill

Luke and Sam Bourke made the transition into the National Indigenous Culinary Institute (NICI) after finishing school in Year 12. Their school's Aboriginal Education Officer in Penrith NSW told them about the NICI program and the opportunities that it provides.

Prior to hearing about the NICI, both Luke and Sam had exposure to work in the hospitality industry through family members who had also followed hospitality pathways, including their older sister who was a qualified chef. However, they had not been exposed to the types of restaurants and the level of the industry that the NICI program partners with, so it was a unique opportunity for them to become qualified chefs through training in one of the country's leading restaurants - Rockpool Bar and Grill, Sydney.

During their NICI program, both Luke and Sam displayed a high level of skill and focus, determined to learn and were dedicated to the process of developing their skill sets. NICI's program manager worked closely with Rockpool's chef leads Neil Perry and Corey Costello, as Luke and Sam juggled their kitchen training with external studies.

After travelling from Penrith to the city for a year, the NICI helped Luke and Sam move closer to work by providing rental assistance so that they could rent their first house together and achieve a greater work-life balance. Eventually when their budgets allowed, the brothers transitioned to covering their rent on their own and moved towards homeownership later in life.

During their time at Rockpool Bar and Grill and as part of completing the NICI program, Luke and Sam have been involved in a large number of specialty events. This includes cooking as part of the team for the Macquarie Group Foundation's 30th Year Anniversary, leading NICI's 2019 trip to Ireland for the Taste of Cork Food Festival, as well as creating the NICI cultural cooking experience for people to learn how to cook at home with corporate partners Google, Pinterest, Breville, Star, Menulog, NRMA, and Hostplus.

Today, Luke is a Sous Chef at Rockpool Bar and Grill Sydney, and Sam is a Sous Chef at Margaret Sydney.

About the organisations involved



The NICI is an industry inspired and initiated program of national significance to create highly skilled indigenous chefs.

NICI offers elite training and experience for aspiring indigenous chefs who will be trained and mentored by Australia's top chefs at host restaurants from Rockpool Bar and Grill, Catalina, Aria, The European, Movida, The Dolphin Hotel, Iceberg's Dining Room and more in Sydney and Melbourne.

Originally designed by Neil Perry, Guillaume Brahimi, Michael McMahon, Jill Dupleix, Terry Durack and Barry McDonald, NICI's program combines unique on-the-job training with a contemporary industry designed qualification. Its trainee chef program aims to produce a group of chefs trained in Australia's top restaurants who will be role models and leaders for up-and-coming indigenous trainees.



Menulog is an app-based food delivery service offering a diverse range of restaurants and cuisines across the country. Menulog connects over four million active customers with more than 36,000 local restaurants, servicing more than 93 per cent of the addressable population. Born in Australia more than 15 years ago, Menulog is now part of Just Eat Takeaway.com, a leading global online food delivery marketplace.



R&CA is the peak industry body representing over 47,000 cafes, restaurants and catering businesses across Australia. The members of R&CA are owners and operators of restaurants, cafes, coffee shops, catering companies, takeaway businesses, and function centres.

R&CA was established in 1922 by café operators as a way of sharing information, saving money and talking to the government. R&CA also celebrates the achievements of operators through its Awards for Excellence program.

