

# Competency Standard

<b>UNIT TITLE:</b> CONSTRUCT AND APPLY TOURISM PRODUCT RESEARCH		<b>NOMINAL HOURS:</b> 100
<b>UNIT NUMBER:</b> D2.TCS.CL5.04		
<b>UNIT DESCRIPTOR:</b> This unit deals with skills and knowledge required to construct and apply tourism product research.		
<b>ELEMENTS AND PERFORMANCE CRITERIA</b>	<b>UNIT VARIABLE AND ASSESSMENT GUIDE</b>	
<p><b>Element 1: Define the need for <i>tourism product research</i></b></p> <p><b>1.1</b> Explain the <i>context</i> within which the product research needs to occur</p> <p><b>1.2</b> Identify the <i>tourism product</i> to be researched</p> <p><b>1.3</b> Identify the <i>objectives of the research</i></p> <p><b>1.4</b> Identify the <i>research data that needs to be obtained</i></p> <p><b>Element 2: Develop the research to be undertaken</b></p> <p><b>2.1</b> Decide the <i>primary data that needs to be obtained</i></p> <p><b>2.2</b> Select the <i>research methods</i> to be applied</p> <p><b>2.3</b> <i>Develop the survey instruments</i></p> <p><b>2.4</b> Identify the need for <i>external professional assistance</i></p>	<p><b>Unit Variables</b></p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to all industry sectors that are involved in, or anticipate involvement with, researching tourism products for presentation to existing or potential clients or target markets within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> <li>1. Travel Agencies</li> <li>2. Tour Operation</li> </ol> <p><i>Tourism product research</i> may apply to:</p> <ul style="list-style-type: none"> <li>• General industry-wide research to determine products worthy of commercial interest</li> <li>• Research targeted at one or more identified products to determine their market place performance and ongoing viability</li> </ul> <p><i>Context</i> may be related to:</p> <ul style="list-style-type: none"> <li>• Internal and external variable factors, as determined by a situational analysis identifying strengths, weaknesses, opportunities and threats</li> </ul>	

<p><b>2.5</b> Identify the <i>sample size</i> to be researched</p> <p><b>Element 3: Conduct the tourism product research</b></p> <p><b>3.1</b> <i>Apply the identified research methods and survey instruments</i></p> <p><b>3.2</b> <i>Record the research results</i></p> <p><b>3.3</b> <i>Monitor the effectiveness of the research</i></p> <p><b>3.4</b> <i>Take action to capture research data identified as absent</i></p> <p><b>3.5</b> <i>Monitor the topic of the research</i></p> <p><b>3.6</b> <i>Follow-up on issues raised during the research process</i></p> <p><b>Element 4: Interpret the research results</b></p> <p><b>4.1</b> <i>Ensure all identified research activities have been completed as planned</i></p> <p><b>4.2</b> <i>Analyse the data that has been captured</i></p> <p><b>4.3</b> <i>Integrate primary and secondary research findings</i></p> <p><b>4.4</b> <i>Prepare a written report</i></p> <p><b>4.5</b> <i>Obtain direction on action to be taken</i></p> <p><b>Element 5: Apply product research knowledge</b></p> <p><b>5.1</b> <i>Identify tourism products to be developed or promoted</i></p> <p><b>5.2</b> <i>Plan a relevant campaign</i></p>	<ul style="list-style-type: none"> <li>• Determining and obtaining existing data both qualitative and quantitative that exists to support decision making, including internal information such as sales, bookings, complaints, customer feedback and information from external sources, such as industry research reports from peak tourism bodies and government agencies</li> <li>• Past and predicted patterns of trade, including emerging trends, sales, bookings, profit, numbers/volume, destinations, preferences for inclusions, preferred carriers and package types</li> <li>• Past promotional activities engaged in by the organisations, including identifying products involved, costs and evaluations undertaken</li> <li>• Goals and objectives of the organisation as set out in business plans and other strategic operational documents</li> <li>• Marketing strategies of the organisation, including growth, expansion, stability, entry into new markets and re-positioning the business in the market place</li> <li>• Involving relevant others in the process, including partners, head office, peak bodies and government agencies</li> <li>• Identifying and analysing the existing marketing mix factors, that is, price, product, place and promotion that apply to organisational products and target markets</li> <li>• Company ethos, including social responsibility, adherence to sustainable practices, compliance with legislated and responsible non-mandatory codes</li> <li>• <i>Tourism product</i> has a broad interpretation and may include:</li> <li>• Products, services and/or packages, including products for domestic and international markets and in-bound and out-bound travellers</li> <li>• Specific products for an identified customer or market, such as attractions, venues, destinations, inclusions, activities and service standards</li> <li>• Generic products for market segments or target markets.</li> </ul> <p><i>Objectives of the research</i> may be related to:</p> <ul style="list-style-type: none"> <li>• Gathering data</li> </ul>
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<p><b>5.3</b> Produce resources to support implementation</p> <p><b>5.4</b> Implement the plan(s) as prepared</p> <p><b>5.5</b> Monitor implementation of the plan(s)</p> <p><b>5.6</b> Take remedial action, where required</p> <p><b>5.7</b> Evaluate the initiative</p>	<ul style="list-style-type: none"> <li>• Comparing alternatives</li> <li>• Assessing the market place</li> <li>• Predicting trends</li> <li>• Identifying the specific tourism products that provide viable and attractive experiences and value-for-money to individual target markets</li> <li>• Making a product-related decision, including adding a new product, modifying an existing product, continuing with a product or removing a product from the range</li> <li>• Understanding factors affecting the customer buying decision.</li> </ul> <p><i>Research data that needs to be obtained</i> should include:</p> <ul style="list-style-type: none"> <li>• Qualitative and quantitative data</li> <li>• Primary research data</li> <li>• Market intelligence factors, including macro and micro trends, political factors, safety and security issues, environmental issues, trends and anticipated consequences.</li> </ul> <p><i>Primary data that needs to be obtained</i> must relate to:</p> <ul style="list-style-type: none"> <li>• The objectives of the research</li> <li>• Filling in the information gaps that exist in the existing secondary research data</li> <li>• Providing sufficient, accurate and reliable information on which to make a decision</li> <li>• Identifying motivational factors that influence customer buying behaviour</li> <li>• Identifying specific tourism activities, products and experiences that underpin reasons to travel</li> <li>• Identifying barriers to travel and other conditions that may adversely affect uptake of a product</li> <li>• Identifying psychometric factors that apply to the respondents.</li> </ul>
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*Research methods* may include:

- Desktop research, including research of internet websites
- Personal observation, including the use of observation checklists
- Postal surveys
- Interviews, including face-to-face focus groups and one-on-one interviews that are fully structured and align with the identified objectives of the research
- Telephone surveys
- Questionnaires
- Suggestion boxes
- Soliciting feedback
- Using stimuli to elicit responses, including broad experience evaluations, product experience research and specific activities evaluations.

*Develop the survey instruments* may include:

- Preparing the questions to be asked during interviews
- Preparing questionnaires
- Preparing checklists for personal observation activities
- Addressing the attitudes, interests and opinions of the respondents (AIO analysis)
- Trailing the survey instruments
- Revising survey instruments on the basis of the trials and the information captured.

*External professional assistance* may include:

- Market research companies with experience and expertise in the travel and tourism industries
- Overseas handling agents
- Industry peak bodies that provide fee-for-service assistance.

*Sample size must include sufficient research respondents to enable a valid and reliable database of information to be assembled and may relate to:*

- Specifying the market segment and target market profile
- Determining the responses required for each
- Ensuring the sample reflects the profile/demographic characteristics of the market segment and target market
- Determining the sampling method to be applied, such as random or non-random sampling.

*Apply the identified research methods and survey instruments may include:*

- Involving external personnel with research experience relevant to the industry or the specific product under consideration
- Ensuring the identified research methodology is applied as intended
- Ensuring the survey instruments are applied as prepared
- Ensuring the required sample size is surveyed
- Providing necessary financial, physical and human resources to support the effective implementation of the research.

*Record the research results may include:*

- Classifying the data into classifications and categories that will enable its useful interpretation, analysis and use
- Ensuring accuracy in the recording and transposing processes
- Filing the raw research material for future reference
- Tracking the number of respondents from each of the required respondent categories
- Ensuring security, privacy and confidentiality of the data.

*Monitor the effectiveness of the research* may include:

- Conducting ongoing activities to identify whether or not the survey instruments and research methodologies being used are capturing the information needed for decision making purposes, including identifying data not being captured, or in insufficient quantities to be reliable
- Checking that the people applying the survey instruments are applying them correctly, including following-up on issues raised by the respondents
- Checking that budgetary limitations are being observed, where applicable
- Ensuring that the required deadline for finishing the research process remains viable
- Liaising with data gathering personnel to identify issues arising, including effective resolution of those issues as they relate to the research process.

*Take action to capture research data identified as absent* may include:

- Re-drafting questions and questionnaires
- Starting the research process again and deleting all data already gathered
- Increasing the sample size
- Extending timelines
- Providing supplementary resources, including time as necessary to ensure reliable and comprehensive data can be captured
- Involving external organisations
- Re-formulating the research objectives.

*Monitor the topic of the research* may include:

- Identifying the ongoing market position and/or performance of the product that is at the centre of the research

- Determining if changes in the product, environment and/or performance warrant changes to the research, including identifying new or amended topics for research, changes to sample sizes, alterations to target markets and/or market segments, alterations to questions and survey instruments and revisiting of data already gathered
- Determining whether the research project should be suspended or cancelled.

*Follow-up on issues raised* may include:

- Re-interviewing individuals or groups
- Seeking clarification on matters raised
- Redesigning the survey instrument and/or questions to accommodate legitimate additional issues raised by respondents.

*Ensure all identified research activities have been completed* may include:

- Checking data that has been received
- Speaking with relevant staff
- Verifying operational plans/checklists against work completed.

*Analyse the data* may include:

- Classifying, grouping and categorising data
- Identifying trends
- Quantifying data
- Undertaking calculations to use as research statistics, including totals, ratios, percentages and other statistical analysis techniques
- Drawing conclusions from the data supported by verifiable evidence from the research
- Making recommendations based on the data.

*Integrate primary and secondary research* may include:

- Ensuring existing and new data is considered
- Covering qualitative information and quantitative data.

*Written report* may include:

- Identifying objectives for the research
- Timelines and costs involved
- Samples of data captured as part of the process
- Names of those involved
- Tables and charts
- Supporting notes and explanations
- Making a personal presentation of the report
- Results of the review and analysis
- Recommendations
- Distributing the report
- Gaining feedback on the report.

*Obtain direction on action to be taken* may include:

- Identifying the use to be made of the research material
- Gaining official authorisation for action
- Obtaining necessary resources to support the implementation of the approved course(s) of action
- Identifying limitations and parameters that apply to the planning and implementation phases of the identified initiative
- Identifying further research that needs to be undertaken before a business decision can be taken, where appropriate.

*Tourism products to be developed* may include:

- Individual products or areas deemed valid or viable as a result of debate about and analysis of relevant research data
- Individual products or areas approved by management.

*Plan a relevant campaign* may include:

- Preparing written plans, including tasks/activities, timelines, responsibilities, resources required/available and milestones
- Identifying a theme or focus
- Identifying or confirming the target market and market segments
- Resourcing the initiative
- Developing monitoring and evaluation activities.

*Resources to support implementation* may include:

- Brochures
- Marketing materials
- Advertising
- Sales materials
- Sales team
- Training
- Public relations
- Point of sale material.

*Implement the plan(s)* may include:

- Following plans as written
- Developing an appropriate implementation team

- Ensuring promised resources are provided
- Assisting personnel in discharging their responsibilities
- Negotiating and mentoring
- Approving actions
- Authorising payments
- Overseeing activities and providing managerial and supervisory expertise.

*Monitor implementation* may include:

- Conducting regular meetings and debriefing sessions with relevant personnel
- Checking documentation related to the initiative
- Meeting with external providers to check on progress
- Evaluating progress against budget, timelines and specified other criteria
- Informing management of actual progress compared to projections.

*Take remedial action* may include:

- Revising plans
- Revising resources allocation
- Changing the composition of the implementation team, including internal/external team members
- Changing allocation of duties, tasks and responsibilities
- Altering timelines.

*Evaluate the initiative* may include:

- Tracking performance of the project/initiative against expectations and projections, including cost and sales related issues as well as customer levels of response and satisfaction
- Identifying, capturing and analysing new market data generated by the initiative
- Identifying lessons that can be applied to other projects and initiatives within the organisation
- Determining the ongoing future of the project/initiative, including identifying location in the product life cycle, return on investment and potential for re-framing the initiative into another product.

#### **Assessment Guide**

The following skills and knowledge must be assessed as part of this unit:

- Enterprise policies and procedures in regard to research and development including company ethos, corporate responsibility, values and business goals and direction
- Principles of tourism product research including the ability to plan and apply market research activities
- Ability to capture, classify, analyse and interpret research data
- Ability to draw conclusions and make recommendations from information and research data
- Ability to produce written reports reflecting the qualitative and quantitative findings of objective primary and secondary research data
- Ability to lead and manage the activities of a research and development team
- General knowledge of the travel and tourism industry with an in-depth knowledge of the area under consideration
- Ability to use management and supervisory skills including communication, negotiation, support, coaching and leadership.

**Linkages To Other Units**

- Access and retrieve computer-based data
- Develop and update local knowledge
- Develop a marketing strategy and coordinate sales activities
- Develop and implement a business plan
- Develop new products and services
- Gather and present product information
- Maintain a paper-based filing and retrieval system
- Manage and implement small projects
- Develop and supervise operational approaches
- Lead and manage people
- Manage the effective use of human resources
- Provide professional support to business colleagues
- Develop and update tourism industry knowledge
- Source and package tourism products and services
- Source and provide destination information and advice
- Maintain contacts with handling agents
- Monitor tourism operations
- Coordinate production of brochures and marketing materials
- Create, implement and evaluate strategic product initiatives
- Develop, manage and evaluate local marketing strategies
- Plan and implement sales activities

- Develop and manage business strategies
- Manage and monitor innovative tourism programs and projects
- Source and present information
- Lead and manage a development team.

### **Critical Aspects of Assessment**

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to research and development including company ethos, corporate responsibility, values and business goals and direction
- Demonstrated ability to undertake tourism product research on a nominated product within a given context, including the prescription of research objectives and produce a comprehensive, contemporary and accurate written report that analyses the research data and provides viable recommendations for action to enable the attainment of the stated objectives.

### **Context of Assessment**

This unit may be assessed on or off the job:

- Assessment should include practical demonstration of tourism product research either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility.

### **Resource Implications**

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

### **Assessment Methods**

The following methods may be used to assess competency for this unit:

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Analysis of a portfolio of evidence generated by the candidate including research data, drafts, reports, feedback obtained, raw research material and plans
- Role plays demonstrating research/interviewing skills, conducting staff briefings and presenting the findings of research
- Third party reports completed by a supervisor
- Project and assignment work.

### **Key Competencies in this Unit**

*Level 1 = competence to undertake tasks effectively*

*Level 2 = competence to manage tasks*

*Level 3 = competence to use concepts for evaluating*

<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, organising and analysing information	3	Evaluate research information and data
Communicating ideas and information	2	Explain the research objectives to research staff
Planning and organising activities	3	Schedule research activities; prepare implementation plans
Working with others and in teams	2	Manage a research and development team

	Using mathematical ideas and techniques	2	Calculate data obtained during the research process
	Solving problems	3	Find additional data to ensure gaps in information are addressed
	Using technology	2	Use the internet for research; use software programs to capture and manipulate research data