Construct and apply tourism product research

D2.TCS.CL5.04

Assessor Manual

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Assessor Manual

Project Base

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit
b) The strengths of participants
c) The number of participants in the class
d) Time required to complete assessments
e) Time dedicated to assessment
f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing Checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

Prior to the assessment I have:	Tick (✓)	Remarks
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:
    a) *Using the 'X' method of assessment*
    b) *At 'X' location*
    c) *You will have 'X time period' for this assessment*
  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

- I will give you feedback at the end of the assessment
- Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the ‘Pass Competent’ or ‘Not Yet Competent’ decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency standard

<table>
<tr><td>UNIT TITLE: CONSTRUCT AND APPLY TOURISM PRODUCT RESEARCH</td><td>NOMINAL HOURS: 100</td></tr>
<tr><td colspan="2">UNIT NUMBER: D2.TCS.CL5.04</td></tr>
<tr><td colspan="2">UNIT DESCRIPTOR: This unit deals with skills and knowledge required to construct and apply tourism product research.</td></tr>
<tr><td>ELEMENTS AND PERFORMANCE CRITERIA</td><td>UNIT VARIABLE AND ASSESSMENT GUIDE</td></tr>
<tr><td>Element 1: Define the need for tourism product research
1.1 Explain the context within which the product research needs to occur
1.2 Identify the tourism product to be researched
1.3 Identify the objectives of the research
1.4 Identify the research data that needs to be obtained
Element 2: Develop the research to be undertaken
2.1 Decide the primary data that needs to be obtained
2.2 Select the research methods to be applied
2.3 Develop the survey instruments
2.4 Identify the need for external professional assistance</td><td>Unit Variables
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.
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:
1. Travel Agencies
2. Tour Operation
Tourism product research may apply to:
• General industry-wide research to determine products worthy of commercial interest
• Research targeted at one or more identified products to determine their market place performance and ongoing viability
Context may be related to:
• Internal and external variable factors, as determined by a situational analysis identifying strengths, weaknesses, opportunities and threats</td></tr>
</table>

2.5 Identify the *sample size* to be researched **Element 3: Conduct the tourism product research** **3.1** *Apply the identified research methods and survey instruments* **3.2** *Record the research results* **3.3** *Monitor the effectiveness of the research* **3.4** *Take action to capture research data identified as absent* **3.5** *Monitor the topic of the research* **3.6** *Follow-up on issues raised* during the research process **Element 4: Interpret the research results** **4.1** *Ensure all identified research activities have been completed* as planned **4.2** *Analyse the data* that has been captured **4.3** *Integrate primary and secondary research* findings **4.4** Prepare a *written report* **4.5** *Obtain direction on action to be taken* **Element 5: Apply product research knowledge** **5.1** Identify *tourism products to be developed* or promoted **5.2** *Plan a relevant campaign*	• 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 • Past and predicted patterns of trade, including emerging trends, sales, bookings, profit, numbers/volume, destinations, preferences for inclusions, preferred carriers and package types • Past promotional activities engaged in by the organisations, including identifying products involved, costs and evaluations undertaken • Goals and objectives of the organisation as set out in business plans and other strategic operational documents • Marketing strategies of the organisation, including growth, expansion, stability, entry into new markets and re-positioning the business in the market place • Involving relevant others in the process, including partners, head office, peak bodies and government agencies • Identifying and analysing the existing marketing mix factors, that is, price, product, place and promotion that apply to organisational products and target markets • Company ethos, including social responsibility, adherence to sustainable practices, compliance with legislated and responsible non-mandatory codes • *Tourism product* has a broad interpretation and may include: • Products, services and/or packages, including products for domestic and international markets and in-bound and out-bound travellers • Specific products for an identified customer or market, such as attractions, venues, destinations, inclusions, activities and service standards • Generic products for market segments or target markets. *Objectives of the research* may be related to: • Gathering data

5.3 Produce *resources to support implementation* **5.4** *Implement the plan(s)* as prepared **5.5** *Monitor implementation* of the plan(s) **5.6** *Take remedial action*, where required **5.7** *Evaluate the initiative*	• Comparing alternatives • Assessing the market place • Predicting trends • Identifying the specific tourism products that provide viable and attractive experiences and value-for-money to individual target markets • 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 • Understanding factors affecting the customer buying decision. *Research data that needs to be obtained* should include: • Qualitative and quantitative data • Primary research data • Market intelligence factors, including macro and micro trends, political factors, safety and security issues, environmental issues, trends and anticipated consequences. *Primary data that needs to be obtained* must relate to: • The objectives of the research • Filling in the information gaps that exist in the existing secondary research data • Providing sufficient, accurate and reliable information on which to make a decision • Identifying motivational factors that influence customer buying behaviour • Identifying specific tourism activities, products and experiences that underpin reasons to travel • Identifying barriers to travel and other conditions that may adversely affect uptake of a product • Identifying psychometric factors that apply to the respondents.

	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*

Key Competencies	Level	Examples
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

Oral questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Construct and apply tourism product research D2.TCS.CL5.04
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. Explain the context within which product research needs to occur.	❑	❑
2. How would you identify the tourism product to be researched?	❑	❑

Questions	Response	
	PC	NYC
3. Explain how you would identify the objectives of the research.	❑	❑
4. Explain what research data needs to be obtained.	❑	❑
5. Explain what primary data would need to be obtained.	❑	❑

Questions	Response	
	PC	NYC
6. Explain what research methods could be applied.	❑	❑
7. What survey instruments could be utilised when conducting research?	❑	❑
8. Why might there be a need for external assistance when conducting research?	❑	❑

Questions	Response	
	PC	NYC
9. How would you identify an appropriate sample size to be surveyed?	❑	❑
10. Identify some of the activities involved in applying the research plan.	❑	❑
11. Explain how you would record the results of the research.	❑	❑

Questions	Response	
	PC	NYC
12. What steps might you take when monitoring the effectiveness of the research?	❑	❑
13. What action might you take to capture absent research data?	❑	❑
14. Explain how you would monitor the topic of research.	❑	❑

Questions	Response	
	PC	NYC
15. What action might you take to follow up on any issues raised during the research relating to data collected?	❑	❑
16. Explain how you will ensure all research activities have been completed as planned.	❑	❑
17. What is the purpose of analysing the data obtained as a result of the research?	❑	❑

Questions	Response	
	PC	NYC
18. What activities might be conducted in order to integrate the primary and secondary research findings?	❑	❑
19. What needs to be considered when preparing the written report?	❑	❑
20. You need to obtain direction on the action to be taken regarding research outcomes, findings and recommendations. What process would you follow?	❑	❑

Questions	Response	
	PC	NYC
21. Identify what types of tourism products or services could be considered for development or promotion.	❑	❑
22. Explain why it would be necessary to plan and develop a whole campaign to introduce a new product or service across and organisation.	❑	❑
23. Explain how the right resources might impact the success or failure of new products or services.	❑	❑

Questions	Response	
	PC	NYC
24. You are about to implement the plan for a new product or service on which you have conducted research. Explain how you will prepare relevant staff and the importance of such preparation.	❑	❑
25. How would you monitor the implementation of the plan (as in Q 24)?	❑	❑
26. Why might you need to take remedial action once implementation of the plan is underway?	❑	❑

Questions	Response	
	PC	NYC
27. Explain the importance of evaluating the initiative as a whole.	❑	❑

Written questions

Construct and apply tourism product research – D2.TCS.CL5.04

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. Identify three common reasons for sourcing information.

   ____

   ____

   ____

   ____

2. Identify all topics listed in trainee manual that need to be considered when researching external influences.

   ____

   ____

   ____

   ____

3. List three points that may assist when determining research questions asked.

   ____

   ____

   ____

   ____

4. Give a brief definition of the following types of data:

   Primary ______________________________

   ____

   ____

   Secondary______________________________

   ____

   ____

   Qualitative______________________________

   ____

   Quantitative______________________________

   ____

   ____

5. List three points which primary and secondary data must relate to.

   ____

   ____

   ____

   ____

6. Identify five of the many research methods available.

   ____

   ____

   ____

   ____

   ____

7. Give three aspects of a survey instrument you might want to check.

   ____

   ____

   ____

   ____

8. Give three reasons you might seek external assistance when conducting research.

9. Identifying ideal sample size for tourism research may relate to what key points? (Provide three)

10. People involved in a research activity must have an understanding of what is expected of them. This may include what in particular? Provide three answers.

11. How might a business record and store research results?

12. Why is it important to monitor the research plan and its effectiveness?

13. What is meant by ‘absent research data’?

14. When monitoring the topic of research what may be included for consideration?

15. Provide three reasons you might be required to obtain additional information when conducting research.

16. What three methods could be included to ensure completion of research activities?

17. What is the process of data analysis?

18. After the analysis of research data, what possible topics for recommendation may be included? (Provide three answers)

19. List all content that should be included when preparing a written report (as per Trainee Manual).

20. Provide three reasons you might need to obtain direction on any action to be taken after completing research.

21. List three areas new tourism products or services might be developed or promoted.

22. Give three activities that may be included when planning a new campaign for promoting a new tourism product or service.

23. What four categories of resources may be included to support implementation of a new tourism product or resource?

24. Give three reasons you should ensure there is a full staff meeting before implementing a new plan.

25. List three benefits for monitoring the progress of implementation of new products or services.

26. Identify three types of remedial action you could consider if required.

27. Why is it necessary to formally evaluate the new product or service?

Answers to written questions

Construct and apply tourism product research – D2.TCS.CL5.04

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. Identify three common reasons for sourcing information.

Any of the following:

- To demonstrate the professionalism of the business and your individual level of professionalism and expertise
- To answer routine questions that customers and guests expect you to be able to answer
- Providing information regarding products and services to customers and agents
- Provide specific product advice to all types of customer
- Selling tourism products to the customer
- Quote specific individual tourism product prices
- Booking and coordinating a supplier service for the customer
- Comparing information offered from different suppliers
- Evaluating products and services, including suppliers, providers, destinations, offers and carriers
- Updating databases and information inventories and files
- Reviewing customer information on identified target markets or target demographics
- Maintaining currency with industry offerings, trends and initiatives
- Complying with relevant legislation, industry codes of practice, industry benchmarks and best practice standards
- Developing new or revised products and services
- Identifying, evaluating and determining costs, prices, schedules, commissions, discounts, rebates, bonuses and other industry/supplier issues.

2. Identify all topics listed in trainee manual that need to be considered when researching external influences.

- Economic
- Social
- Technological
- Legal
- Environments.

3. List three points that may assist when determining research questions asked.

Any of the following:

- Geographic and locational factors
- Demographic factors
- Psychological factors
- Purchasing methods
- Products and services
- Price
- Advertising
- Benefit segmentation
- The market
- The competition.

4. Give a brief definition of the following types of data.

Primary

This is new, first-hand, freshly generated data that you generate from original research to help form the basis of marketing decision-making.

Secondary

Getting together all the data that already exists on the topic in question. This data isn’t therefore newly generated, but merely a consolidation of existing facts.

Qualitative

Qualitative data is also known as ‘soft’ data.

Qualitative research does not look at numbers but tries to find out the reasoning behind certain actions, procedures, activities or ways of thought.

Quantitative

Quantitative information is also known as ‘hard data’.

Quantitative research is market research, based on structured, closed-ended questionnaires, which aims to gather responses that can be summarised in numbers.

5. List three points which primary and secondary data must relate to.

Any of the following:

- The objectives of the research
- Providing sufficient, accurate and reliable information on which to make a decision
- Identifying motivational factors that influence customer buying behaviour
- Identifying specific tourism activities, products and experiences that underpin reasons to travel
- Identifying barriers to travel and other conditions that may adversely affect uptake of a product
- Identifying psychometric factors that apply to the respondents.

6. Identify five of the many research methods available.

Any of the following:

- Conduct a SWOT Analysis
- Conduct desktop research
- Conduct personal surveys
- Conduct mail surveys
- Experimentation
- Observation
- Reviewing past records and previous business plans
- Reading print materials
- Participating in industry associations
- Establishing industry networks
- Reviewing government publications
- Collecting and reviewing statistics
- Performing competitive analysis
- Conducting focus group sessions
- Interviewing customers
- Distributing comment cards
- Conducting customer surveys
- Reviewing logged feedback
- Talking to and analysing suppliers
- Reviewing marketing intermediaries
- Reviewing business legal structure
- Conducting service audits
- Assessing public perception of the business
- Reviewing your various ‘publics’.

7. Give three aspects of a survey instrument you might want to check.

Any of the following:

- Do they do what you expected them to do?
- Do they elicit the information you are seeking?
- Are they easy to use?
- Is there enough space to write responses?
- Should the wording be changed to make the questions clearer?
- Were you using industry terms that people couldn't understand?

8. Give three reasons you might seek external assistance when conducting research.

Any of the following:

- To provide expertise in conducting research
- To access research systems
- To gather information that makes up part of the data to be collected
- For acquisition of specialised information
- To interpret existing information gathered
- Provide findings and recommendations
- To clarify concerns or answer any questions.

9. Identifying ideal sample size for tourism research may relate to what key points? (Provide three)

Any of the following:

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

10. People involved in a research activity must have an understanding of what is expected of them. This may include what in particular? (Provide three answers)

Any of the following:

- Objectives of the research project
- Methods of data collection to use
- Timeframes for collecting data
- Budget associated with project
- Communication of findings.

11. How might a business record and store research results?

- Manual filing systems
- Computerised systems
- Combination of the above.

12. Why is it important to monitor the research plan and its effectiveness?

To ensure that is stays on track, either in terms of purpose, timing or budget, to name a few parameters.

13. What is meant by 'absent research data'?

Insufficient data being collected.

14. When monitoring the topic of research what may be included for consideration?

- Identifying the ongoing market position or performance of the product that is at the centre of the research
- Determining if changes in the product, environment or performance warrant changes to the research
- Determining whether the research project should be suspended or cancelled.

15. Provide three reasons you might be required to obtain additional information when conducting research.

Any of the following:

- Request by management
- Direct questions from potential customers or staff
- Questions from potential customers or management
- Points raised by staff requiring clarification
- Additional information regarding a topic which is not detailed in existing materials
- New trends, regulations or industry issues.

16. What three methods could be included to ensure completion of research activities?

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

17. What is the process of data analysis?

Analysis of data is a process of inspecting, cleaning, transforming, and modelling data with the goal of highlighting useful information, suggesting conclusions, and supporting decision making.

It is essential that the information extracted is reliable, accurate and suitable.

18. After the analysis of research data, what possible topics for recommendation may be included? (Provide three answers)

Any of the following:

- Suggestions as to what to do to leverage on identified strengths
- Recommendation to address identified weaknesses
- Strategies for addressing identified opportunities and threats
- Recommendations for changing the organisational structure of the business
- Recommendations to enable greater compliance
- Recommendations to address future activity.

19. List all content that should be included when preparing a written report as per Trainee manual.

- Title Page
- Table of Contents
- Executive Summary
- Purpose of the Report
- Background Information
- Overall Evaluation Goals
- Methodology
- Interpretations and Conclusions
- Recommendations
- Appendices.

20. Provide three reasons you might need to obtain direction on any action to be taken after completing research.

Any of the following:

- 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.

21. List three areas new tourism products or services might be developed or promoted.

Any of the following:

- Accommodation
- Transfers
- Transportation – rail, ferry, car and van hire
- Special events
- Travel Insurance
- Meetings, conventions, incentives, exhibitions
- Visa services
- Merchandise.

22. Give three activities that may be included when planning a new campaign for promoting a new tourism product or service.

Any of the following:

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

23. What four categories of resources may be included to support implementation of a new tourism product or resource?

- Physical resources
- Human resources
- Financial resources
- Intellectual property.

24. Give three reasons you should ensure there is a full staff meeting before implementing a new plan.

To ensure staff:

- Understanding new products and services
- Understand their role in providing or promoting new products and services
- Understand any promotions.

25. List three benefits for monitoring the progress of implementation of new products or services.

Any of the following:

- The success of new products and services can be evaluated
- Any required changes can be identified and actions in a timely manner
- Things are more likely to happen as planned
- Management and staff actually know what's going on in the business
- Success of marketing initiatives can be evaluated
- Service and product are consistent over time
- Work operations fit with work and organisation goals
- Staff feel supported and involved
- Customer needs are met.

26. Identify three types of remedial action you could consider if required.

Any of the following:

- Revising plans
- Remove the product or service if it is not successful
- Reduce or expand the product or service range
- Amend product or service inclusions
- Revising resources allocation
- Increasing staff numbers
- Changing the composition of the implementation team, including internal or external team members
- Changing allocation of duties, tasks and responsibilities
- Providing training to staff to improve service provision
- Altering timelines
- Change or enhance the promotional message
- Establishing additional or revised pre-programmed decisions to address shortcomings or problems
- Buying new equipment, or more equipment or different equipment
- Making changes to establishment policies and standard operating procedures (SOPs)
- Changing operating times
- Changing layout of the product or organisation itself
- Organise more information for customers
- Change prices to meet customer demands whilst still meeting financial expectations.

27. Why is it necessary to formally evaluate the new product or service?

- To analyse and assess the success and operational effectiveness
- To ensure it meets the requirements for the targets and more importantly target customers
- The basic requirement when analysing the success of new products and services is its ability to reach its desired objectives of performance standards.

Observation checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Construct and apply tourism product research D2.TCS.CL5.04
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Define the need for tourism product research b) Develop the research to be undertaken c) Conduct the tourism product research d) Interpret the research results e) Apply product research knowledge 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Define the need for tourism product research		
Explain the context within which the product research needs to occur	❑	❑
Identify the tourism product to be researched	❑	❑
Identify the objectives of the research	❑	❑
Identify the research data that needs to be obtained	❑	❑

Did the candidate	Yes	No
Element 2: Develop the research to be undertaken		
Decide the primary data that needs to be obtained	❑	❑
Select the research methods to be applied	❑	❑
Develop the survey instruments	❑	❑
Identify the need for external professional assistance	❑	❑
Identify the sample size to be researched	❑	❑
Element 3: Conduct the tourism product research		
Apply the identified research methods and survey instruments	❑	❑
Record the research results	❑	❑
Monitor the effectiveness of the research	❑	❑
Take action to capture research data identified as absent	❑	❑
Monitor the topic of the research	❑	❑
Follow-up on issues raised during the research process	❑	❑
Element 4: Interpret the research results		
Ensure all identified research activities have been completed as planned	❑	❑
Analyse the data that has been captured	❑	❑
Integrate primary and secondary research findings	❑	❑
Prepare a written report	❑	❑
Obtain direction on action to be taken	❑	❑

Did the candidate	Yes	No
Element 5: Apply product research knowledge		
Identify tourism products to be developed or promoted	❑	❑
Plan a relevant campaign	❑	❑
Produce resources to support implementation	❑	❑
Implement the plan(s) as prepared	❑	❑
Monitor implementation of the plan(s)	❑	❑
Take remedial action, where required	❑	❑
Evaluate the initiative	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no:**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Construct and apply tourism product research D2.TCS.CL5.04		
The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence. Please answer these questions as a record of their performance while working with you. Thank you for your time.			

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 1: Define the need for tourism product research			
Able to explain the context within which the product research needs to occur	❑	❑	❑
Able to identify the tourism product to be researched	❑	❑	❑
Able to identify the objectives of the research	❑	❑	❑
Able to identify the research data that needs to be obtained	❑	❑	❑
Element 2: Develop the research to be undertaken			
Decides the primary data that needs to be obtained	❑	❑	❑
Selects the research methods to be applied	❑	❑	❑
Develops the survey instruments	❑	❑	❑
Identifies the need for external professional assistance	❑	❑	❑
Identifies the sample size to be researched	❑	❑	❑

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	Yes	No	Not sure
Element 3: Conduct the tourism product research			
Applies the identified research methods and survey instruments	❑	❑	❑
Records the research results	❑	❑	❑
Monitors the effectiveness of the research	❑	❑	❑
Takes action to capture research data identified as absent	❑	❑	❑
Monitors the topic of the research	❑	❑	❑
Follows-up on issues raised during the research process	❑	❑	❑
Element 4: Interpret the research results			
Ensures all identified research activities have been completed as planned	❑	❑	❑
Analyses the data that has been captured	❑	❑	❑
Integrates primary and secondary research findings	❑	❑	❑
Prepares a written report	❑	❑	❑
Obtains direction on action to be taken	❑	❑	❑
Element 5: Apply product research knowledge			
Identifies tourism products to be developed or promoted	❑	❑	❑
Plans a relevant campaign	❑	❑	❑
Produces resources to support implementation	❑	❑	❑
Implements the plan(s) as prepared	❑	❑	❑
Monitors implementation of the plan(s)	❑	❑	❑
Takes remedial action, where required	❑	❑	❑
Evaluates the initiative	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency recording sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Construct and apply tourism product research	D2.TCS.CL5.04
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Define the need for tourism product research						
Explain the context within which the product research needs to occur						
Identify the tourism product to be researched						
Identify the objectives of the research						
Identify the research data that needs to be obtained						
Element 2: Develop the research to be undertaken						
Decide the primary data that needs to be obtained						
Select the research methods to be applied						
Develop the survey instruments						
Identify the need for external professional assistance						
Identify the sample size to be researched						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 3: Conduct the tourism product research						
Apply the identified research methods and survey instruments						
Record the research results						
Monitor the effectiveness of the research						
Take action to capture research data identified as absent						
Monitor the topic of the research						
Follow-up on issues raised during the research process						
Element 4: Interpret the research results						
Ensure all identified research activities have been completed as planned						
Analyse the data that has been captured						
Integrate primary and secondary research findings						
Prepare a written report						
Obtain direction on action to be taken						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 5: Apply product research knowledge						
Identify tourism products to be developed or promoted						
Plan a relevant campaign						
Produce resources to support implementation						
Implement the plan(s) as prepared						
Monitor implementation of the plan(s)						
Take remedial action, where required						
Evaluate the initiative						

Candidate signature:		**Date:**	
Assessor signature:		**Date:**	

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