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QUEENSLAND TOURISM WORKFORCE CRISIS RESILIENCE & RECOVERY PROJECT NATIONAL SURVEY REPORT

DATE November 26, 2021

PREPARED BY

The Queensland Tourism Industry Council
in partnership with The University of Queensland

Cite report as:

Robinson, R.N.S. & Jiang, Y. (2021). Queensland Tourism Workforce Crisis Resilience & Recovery
Project: National Survey Report, Queensland Tourism Industry Council: Brisbane.



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EXECUTIVE SUMMARY

This report is the second major output from a Queensland Government Advance Queensland Industry Research Fellowship funded project, to develop a [Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan](#). The first report, also publicly available on project partner, Queensland Tourism Industry Council's website, summarised findings from 15 consultation workshops conducted throughout regional Queensland. That first report identified a range of threats to Queensland's tourism workforce, including job security and well-being. It also identified resilience levels bottomed out during the first half of 2020 but showed steady improvement throughout 2021. The study found that communication, support, and leadership were key elements required to enhance resilience, and were required equally at the policy, organisational and individual levels. This report summarises the findings of a survey designed principally to better understand factors contributing to employee and organisational resilience. The survey also collected data on tourism's labour force characteristics and responses to various policy and organisational interventions and incentives.

The survey at the broadest level had two main aims. The first aim was to collect descriptive information about the tourism workforce's characteristics, responses to COVID-19 and various policy interventions and incentives, and market adaptability. The second aim was to test a conceptual model, to discover what factors contributed to employee and organisational resilience building. In analysis, we extended aim two to examine some of the descriptive factors in combination with the resilience results. A particular focus of the survey was to understand whether various tourism industry sectors, and five RTOs of interest in Queensland (Gold Coast, Whitsundays, Tropical North Queensland, Southern Queensland Country, and Outback Queensland), differed in their resilience levels. The survey was administered across several channels and received over 1,500 responses Australia-wide. Discarding incomplete surveys and those that failed attention checkers 1015 responses were retained for analysis. Nearly 46% of responses were from Queensland residents. Nearly 47% of respondents were employed fulltime, the median age of respondents was about 46 years of age, and more women (65.4%) than men responded to the survey. Otherwise, the representativeness of the sample approximated that of the general tourism workforce.

Market adaptation, given the disruption of international markets, was the next focus of the study. The sample reported that pre-COVID, 57.1% were reliant on international markets. However, 63.7% of businesses reported they could fully adapt to a domestic market and 22.1% could partially adapt. Regionally, Tropical North Queensland and Gold Coast most indicated less capacity to adapt to domestic markets, and Outback and Southern Queensland Country stated strong adaptability – relative to responses.

The survey sought responses to the take-up of various government initiatives and active labour market policies (ALMPs). While JobKeeper (46.5%) and JobSeeker (28.8%) were highly subscribed, there was a low take-up and/or awareness of a range of other supports. This was equally true of market incentives. Respondents ranked the reopening of borders (65.7%) and vaccination programs (65.3%) as the most helpful government interventions.

In terms of resilience, women were significantly more resilient than men, and JobKeeper positively impacted resilience. Tourism workers either out of work or not looking for work reported significantly less resilience than all other worker classifications (e.g., volunteers, unemployed but looking, casual etc). When comparing Queensland to the other States, employee resilience for Queensland respondents was significantly higher than employee resilience in New South Wales, Victoria, and South Australia. Similarly, organisational resilience for Queenslanders was significantly higher than that in New South Wales, Victoria, and South Australia and the Australian Capital Territory.

In terms of sector differences, our three sectors of interest were accommodation, food service and retail. Retail had the highest proportion of contingent employees (i.e., zero contract, casual, part-time). Retail also had the lowest take-up of JobKeeper and probably consequently had the lowest employee resilience. On the other hand, accommodation had the highest organisational resilience of the three sectors.

Regarding regional differences within Queensland, only Whitsundays had more rather than less JobKeeper take-ups, compared to the other four regions of interest. Regarding resilience, Tropical North Queensland employee resilience was significantly higher than other regions. Southern Queensland Country's organisational resilience was significantly higher than other regions, as was Tropical North Queensland and Outback Queensland.

The findings of this report point to potential actions for employees and their well-being, to organisational arrangements, and policy reforms with a particular focus on sector and regional differences. Key highlights for policy include a renewed investment in careers, skills, training, and development, which will likely trickle through into organisational resilience via a positive 'learning culture'. Acknowledge that strengthening policy actions in non-work domains (e.g., affordable housing, access to in-destination transport and community and family supports) enhances workforce resilience. Universal ALMPs and Market Incentives have high-level cut-through, while bespoke policies targeting at-risk cohorts (e.g., the unemployed/those not looking for work), regions (e.g., Outback for labour shortages, Tropical North Queensland, and Gold Coast for market incentives) and sectors (e.g., retail workers) can be effective.

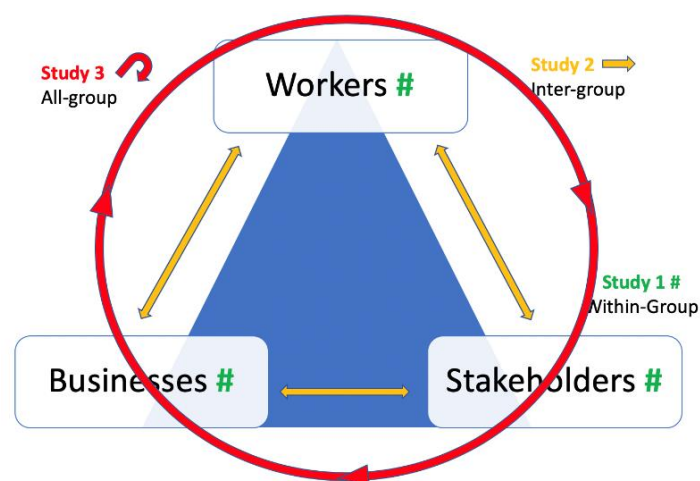
Organisations can embrace the industry's complexity as numerous solutions are possible – for collaboration and adaptability. Organisations with positive learning, change and strategic cultures have the highest resilience. Businesses that provide workers agency enhance employees' organisational commitment. Creating sustainable employment is the key to worker retention and conversely, unsustainable employment leads to worker leakage to other sectors.

For employees being unemployed, AND giving up on seeking work, negatively impacts resilience. Accessing ALMP incentives – programs like JobKeeper – significantly positively impacts individual resilience. Employees should also seek out and access mental health and well-being supports and consider the affordances of employment in larger and mature organisations.

PROJECT OVERVIEW

COVID-19 and its impacts has been significantly disruptive on Queensland's tourism industry. Aside from the demand-side impacts, COVID-19 has also presented acute workforce challenges. Funded by the Queensland Government's Advance Queensland scheme, this project seeks to find strategies for recovery and resilience through a program of research including extensive consultation with industry groups (employees, operators/senior managers, and stakeholders), sectors (retail, accommodation, and food service) and regions. The ultimate goal is to support a staged recovery from the COVID-19 pandemic impacts and to develop workforce resilience and recovery strategies to weather future external shocks via a [Queensland Tourism Workforce Strategy V2: A crisis resilience and recovery plan](#). The project is led by Dr Richard Robinson, of The University of Queensland, in partnership with Queensland Tourism Industry Council (QTIC). The project is supported by Dr Yawei Jiang, a Post-doctoral Research Fellow.

Overall, the project is conceptualised around a 'resolution approach' (see Model 1). This approach assumes that the tourism workforce is comprised of three equally important groups: workers (employees), businesses (operators/managers) and stakeholders. Each of these groups have different perspectives and differing interests, but a Tourism Recovery Strategy will require a resolution approach, whereby the interests and needs of all groups are considered and at times concessions made, for the betterment of the recovery and resilience of the Queensland Tourism Industry holistically.



Model 1 Resolution approach framework

In the first year of the project, on which this report is based, there were two key deliverables. Firstly, a total of 15 consultation workshops were conducted, three in each of five RTO regions: Gold Coast, Whitsundays, Tropical North Queensland, Southern Queensland Country and Outback Queensland. The first three regions lead Queensland's tourism employment contribution (14.7%, 34.3%, and 20.8%, respectively). Outback and Southern Queensland

Country lag comparatively but depend highly on tourism for community benefits and are well-positioned to capture renewed domestic demand (e.g., self-drive markets) when restrictions ease. And in each region one each with employees, operators/senior managers, and stakeholders, that is people that work on rather than in tourism – peak bodies, educators and trainers, council, infrastructure representatives etc. The findings of this phase of the study are detailed in Report 1.

Secondly, an Australia wide survey, sampling across all tourism groups, aimed to understand the characteristics of the workforce, self-reportage on various resilience and resilience-related factors, and finally to consider these resilience and resilience-related factors as a function of the workforce characteristics, three key sectors (accommodation, food service and retail) and explore regional differences. This report focuses on the findings from this survey.

A WORD FROM QTIC'S CHIEF EXECUTIVE

As we rebuild our visitor economy during the COVID recovery phase, it is more apparent than ever that our next big challenge will indeed be managing our labour and skill shortages. Shocks to our labour markets are nothing new but COVID has created a disruption on an unprecedented scale and depth that is challenging our abilities to find practical solutions. There is no single remedy for what has developed into a national and indeed global crisis.

Tourism operators from around the nation are faced with near insurmountable problems in keeping their businesses operating at capacity, with many positions vacant or sufficiently skilled staff in short supply.

This piece of applied research provides valuable insight into the dynamics at work and identifies relevant pressure points where action can be taken. The solutions will have to be found at the policy level and on the shop floor and anywhere in between. Armed with the right knowledge we will stand a much better chance of helping our industry through this and any future crisis.

METHODS & AIMS

In year one of the project there were two data collection deliverables, both designed to better understand the impacts of, resilience to, and recovery from, the COVID-19 pandemic on different tourism groups – and in different regions. This report summarises the second stage of data collection, which involved the administration of an online survey. The survey at the broadest level had two main aims. The first aim was to collect descriptive information about the tourism workforce’s characteristics, responses to COVID-19 and various policy interventions and incentives, and market adaptability. The second aim was to test a conceptual model (see Figure 1), to discover what factors contributed to employee and organisational resilience building. In analysis, we extended aim two to examine some of the descriptive factors in combination with the resilience results. A particular focus of the survey was to understand whether various tourism industry sectors, and five RTOs of interest in Queensland, differed in their resilience levels.

A questionnaire was designed that included a) questions designed to capture the responses to the first descriptive aims of the project and b) questions, using established scales and measures from the scientific literature, to capture responses to the second aim – to test the resilience pathway model (see Figure 1). Finally, we also added an open-ended question allowing respondents to add additional comments, and we also present these in this report.

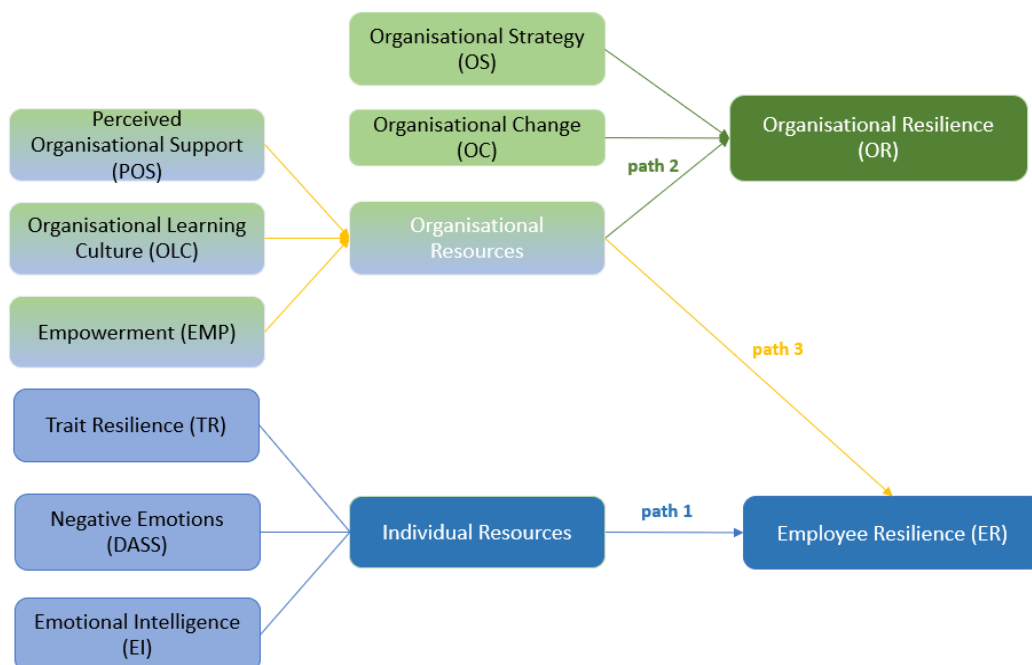


Figure 1 Tourism Employee and Organisation Resilience Model

The model proposed three pathways, each of which posed a question:

- Pathway 1: What individual resources contribute to employee resilience building?
- Pathway 2: What organisational resources and strategies/changes contribute to organisational resilience building, and
- Pathway 3: What organisational resources contribute to employee resilience building?

The survey was created in the survey platform, Qualtrics®, which enabled both online administration and for responses to be automatically stored and formatted for ease of analysis. To quality assure the survey we conducted 10 pre-tests with survey design and statistical experts and 68 pilot tests of survey with tourism employees. We used a variety of survey channels (see Table 1): purchased panel data (via PureProfile¹), and the membership databases of Queensland Tourism Industry Council (QTIC), The Tourism Group, workshop consultation participants from our first study, our university networks (to tap into the student labour market), the Queensland Government's Young Tourism Leaders network and the Queensland Club industry. This approach yielded responses from across Queensland, but also other States, which proved useful in comparative analyses of Queensland's workforce context as compared to that in the rest of Australia. Over 1500 responses ($n=1558$) were received across Australia. After data cleansing a total of 1015 valid responses were retained for analysis. We begin this report by summarising the characteristics of the sample, and comment on its representativeness of the tourism labour market generally.

Survey channels	Returned Survey	Valid Responses
Purchased Panel Data	813	656
Queensland Tourism Industry Council	328	135
The Tourism Group	253	152
Focus Group Participants	47	24
University Students	40	13
Young Tourism Leaders	10	5
Clubs Industry	67	30
Total	1558	1015

Table 1. Survey channels and collected samples

¹ PureProfile is a market research company that also provides data to researchers, according to specific criteria. We specified respondents that worked in the tourism industry, either at the time of the survey, or up until January 2019.

SAMPLE CHARACTERISTICS

Nearly half of all responses were from Queensland residents (45.8% or $n=464$), 26.6% were from New South Wales ($n=269$), and 14.4% from Victoria ($n=146$). Only 13.3% of responses in the sample were received from the other three States and two Territories, combined (see Figure 2).

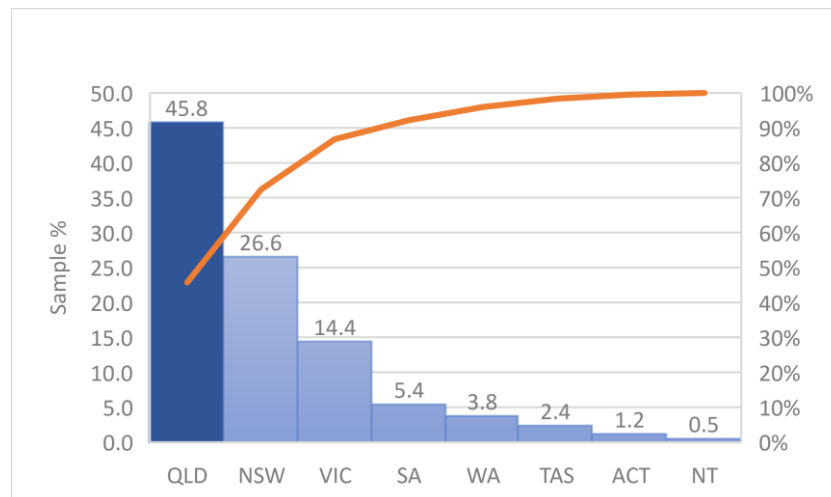


Figure 2 Sample Distribution by States & Territories (%)

The median age of respondents was about 46 years of age. Age group distribution was shown in Figure 3.

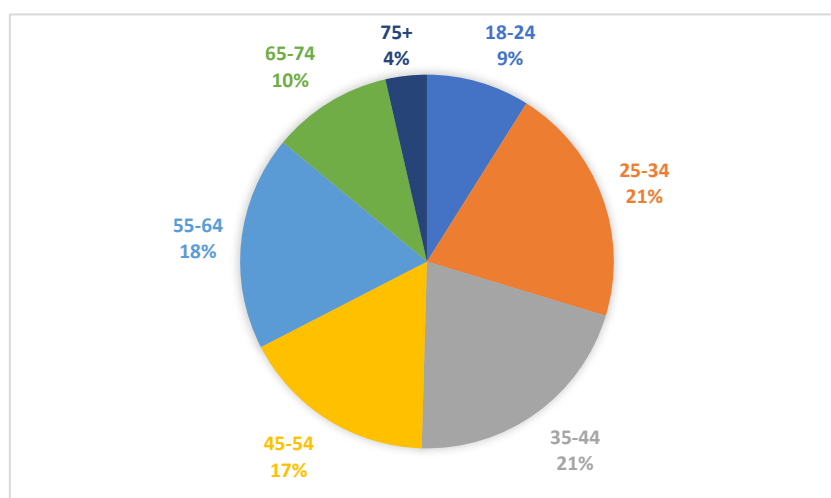


Figure 3 Sample Distribution by Age (%)

In terms of employment status (see Figure 4), the sample shows an over-representation of full-time workers ($n=472$, 46.5%) and volunteers ($n=106$, 10.5%), and likely an under-representation of part-time ($n=166$, 16.4%), casual ($n=193$, 19.0%), and zero contract ($n=6$, 0.6%) workers. Given the COVID-19 context we also captured data for unemployed workers ($n=41$, 4.1%).

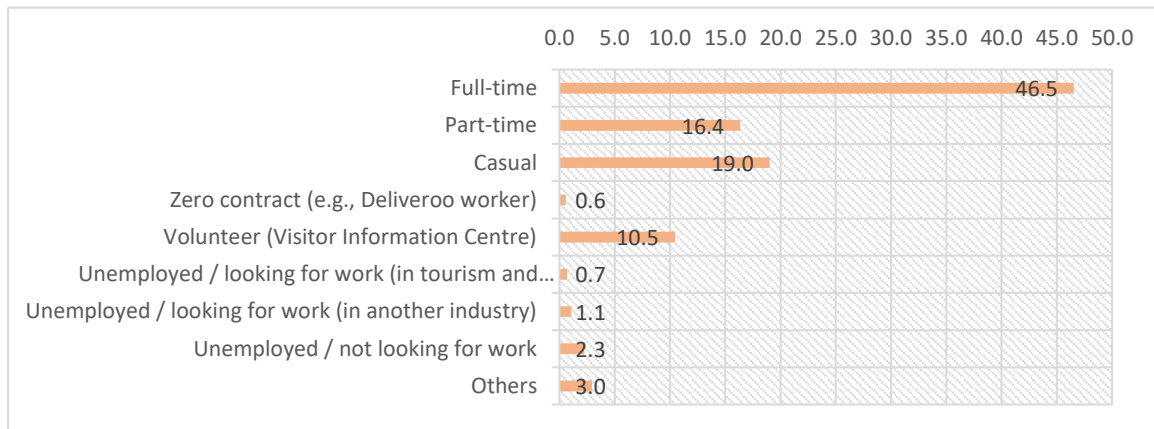


Figure 4 Employment Status of Sample (%)

FINDINGS

1. AIM 1

1.1 OVERALL DESCRIPTIVE ANALYSIS OUTCOMES

We began analysis by conducting several crosstabulations. When **employment status and age** were compared (see Figure 5) it showed:

- Full-time workers ($n=472$) are dominated by middle-aged groups (35-54, $n=235$, 49.8%), with just over a quarter of younger-aged persons (18-34, $n=134$, 28.4%)
- Part-time workers ($n=166$) and casual workers ($n=193$) show a more flattened distribution with slightly younger-aged groups (18-34, i.e., 36.1% for part-time and 43.5% for casual).
- Volunteer workers ($n=106$) are dominated by senior aged groups (above 55, $n=97$, 91.5%).

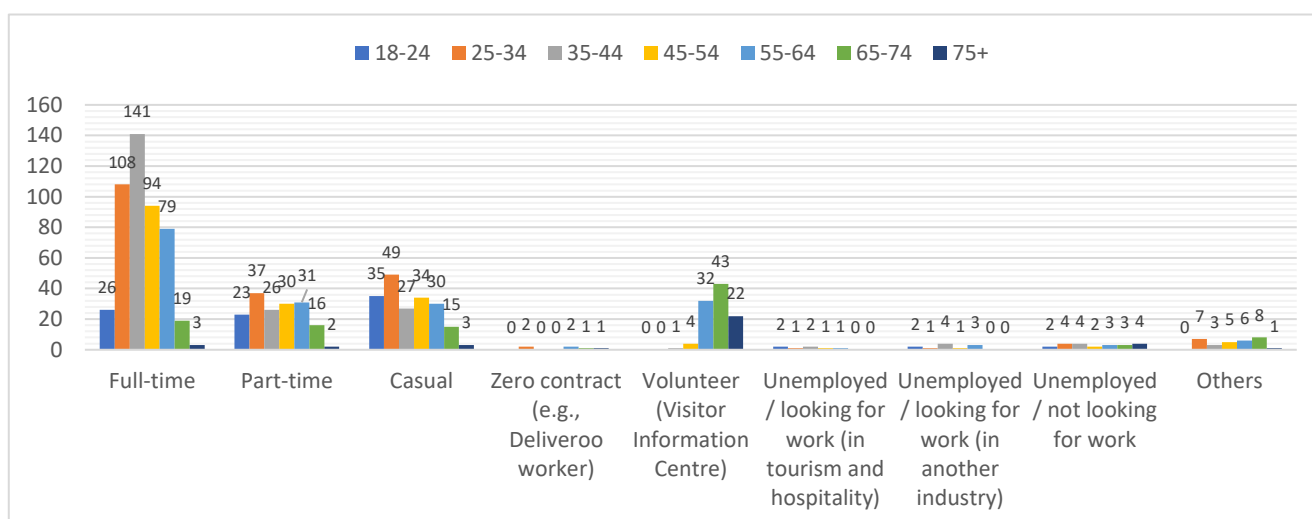


Figure 5 Employment Status vs Age Group (N)

These results are likely an artefact of the sample and not representative of the tourism workforce, although patterns such as middle-aged persons holding full-time positions more frequently and contingent workers (part-time and casual) being younger certainly reflect general tourism workforce characteristics.

Cross-tabulating **employment status with gender** (see Figure 6) showed:

- Women worker proportions are over 75% (much higher than men) in contingent employment - part-time (75.2%), casual (77.2%), and volunteer (76.7%) jobs.
- In full-time jobs, women workers only account for 54.4%, which is much lower than the sample rate (65.4%)

These gendered employment status ratios are reflective of the tourism workforce, and research amid-COVID-19 has also demonstrated that women, along with youth and the lowly educated, are more at risk of losing regular work.

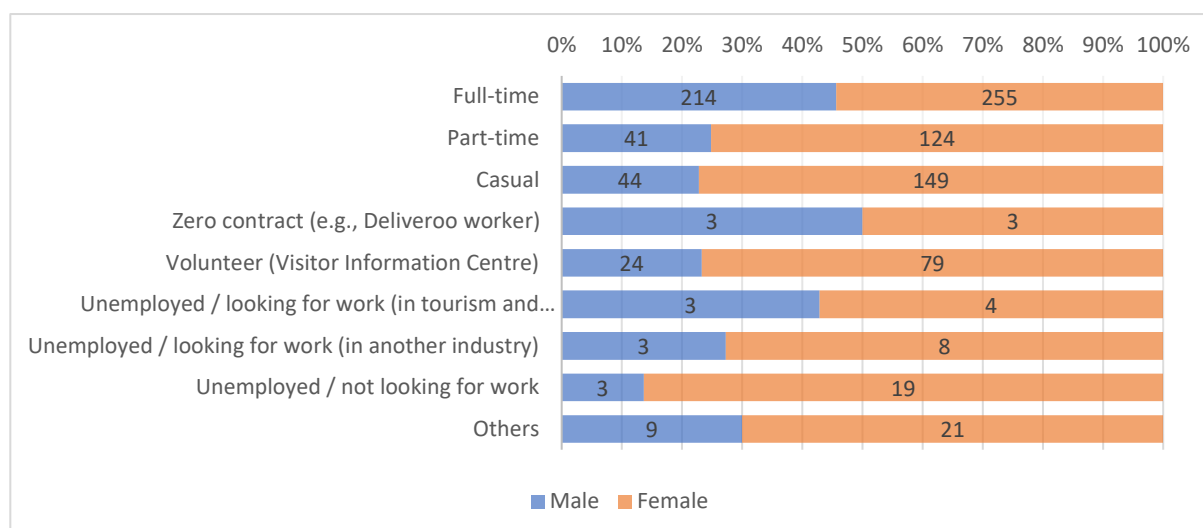


Figure 6 Employment Status vs Gender (N)

When cross-tabulating **occupation with gender** (see Figure 7) the results show:

- More men are employed in senior roles (51.3%) and executive roles (59.7%) in the tourism and hospitality industry, compared to the average sample percentage (34%) in the sample
- Women workers perform more roles as frontline workers (74.0%) and volunteers (74.7%)
- Interestingly, more women started their own businesses in the tourism and hospitality industry

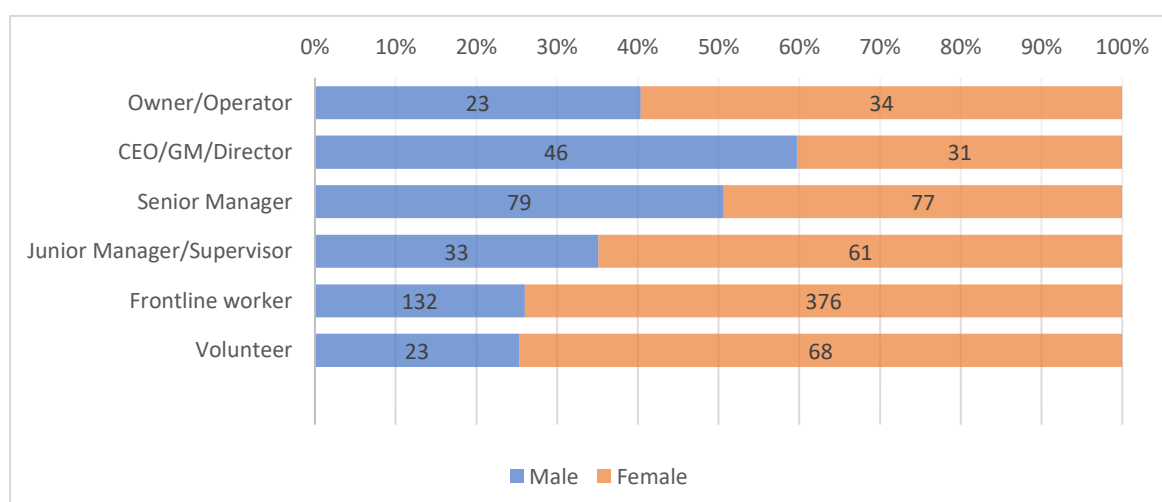


Figure 7 Occupation vs Gender (N)

Again, these findings accord with general tourism workforce characteristics in terms of gender representation in more senior roles.

1.2 MARKET ADAPTATION

In our study we were deeply interested in adaptation, as it is a key characteristic associated with resilience.

We first considered **how businesses' target markets were indicative of market adaptation** (see Figure 8), and found that:

- 57.1% of tourism businesses ($n=578$) in the sample had their target markets dominated by international visitors prior to COVID-19, and 29.8% of businesses ($n=302$) have an even split of international and domestic visitors as their target market. Only 8.5% of respondents said they relied mostly on international visitors prior to COVID-19 ($n=86$).
- Most tourism businesses stated they can either fully adapt (63.7%) or partially adapt (22.1%) to a purely domestic market in COVID-19.
- Of the international visitor-reliant businesses, only 21.0% stated they **cannot** adapt to a purely domestic market in the amid-COVID-19 environment.
- This inadaptability number is 10.8% for businesses that had an even target market split of international and domestic visitors prior to COVID-19.

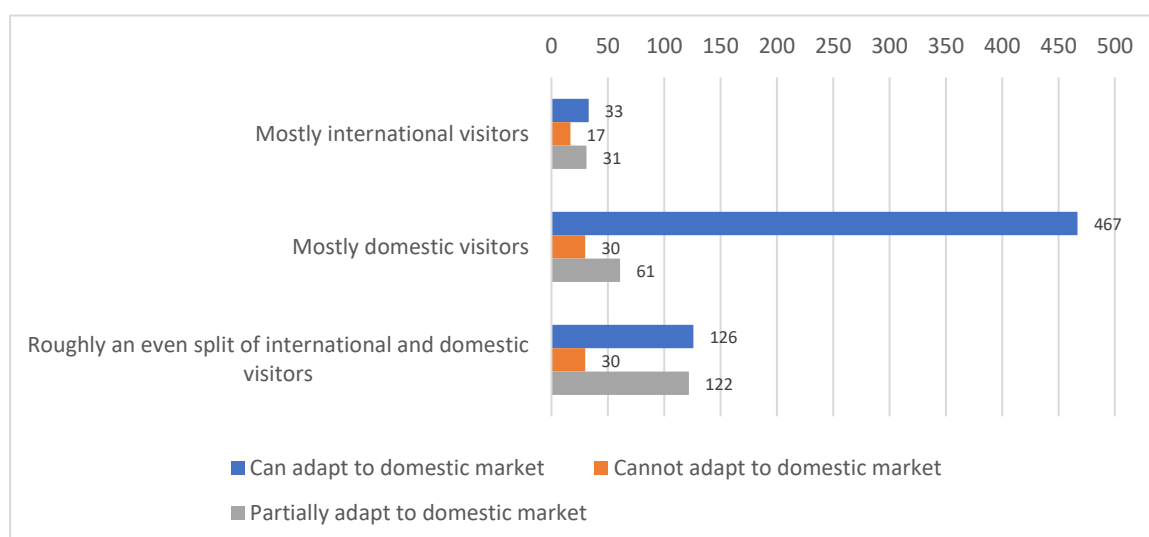


Figure 8 Current Market and Adaptation in COVID-19 (N)

We also undertook a comparative analysis of the **three sectors of interest (accommodation, food service and retail) regarding market adaptation** (see Figure 9). We found that:

- Proportionately, accommodation relied somewhat on the international market and food service on the domestic market.
- All three sectors seemed reasonably agile in terms of adaptability fully, or partially, to a domestic market during the amid-COVID period.
- Accommodation and food service showed some stated inability to pivot to domestic.

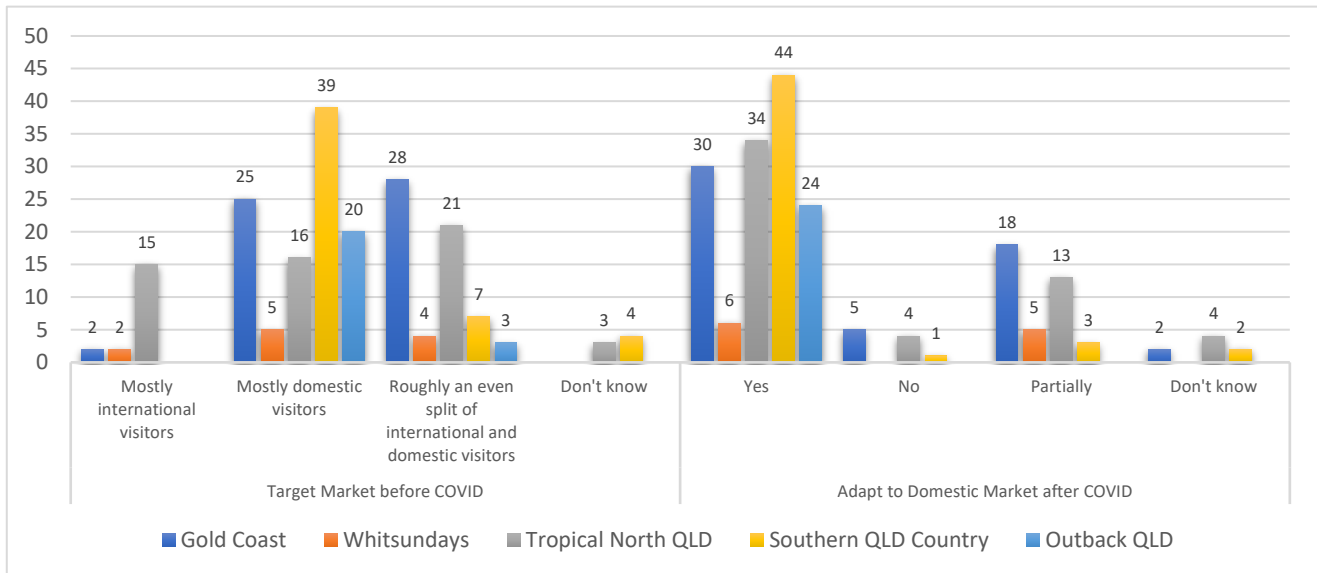


Figure 9 Market Adaptation – N (Five RTO Regions)

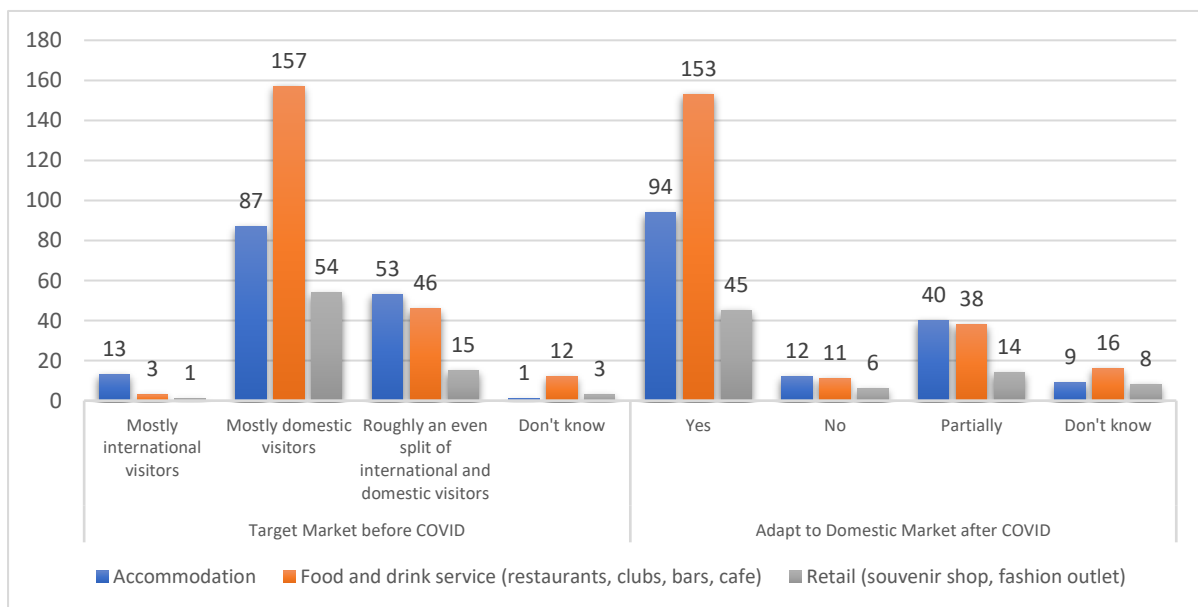


Figure 10 Market Adaptation - N (Three Sectors Comparison)

We also considered whether **market adaptation varied across the five regions of interest**: Gold Coast, Whitsundays, Tropical North Queensland, Southern Queensland Country and Outback.

- The findings reflect, as might be expected (see Figure 10), that the two regions of Tropical North Queensland and Gold Coast most reliant on inbound markets, indicated less capacity to adapt to domestic markets, relative to responses.
- Alternatively, Outback Queensland and Southern Queensland Country, traditionally reliant on domestic markets, stated strong adaptability, again relative to responses.²

1.3 INTERVENTION IMPACTS FINDINGS

1.3.1 Employment Related Interventions

Across 2020 and 2021 a range of **active labour market policies (ALMPs)**, mostly initiated by the Australian Government, were administered as interventions (with supporting funds and/or resources). We asked respondents to comment on whether these were helpful or not, and whether they were aware of the policies and/or if they were relevant (see Figure 11). We found that:

- Among the employment related interventions, 46.5% agreed that ***JobKeeper payments*** were helpful ($n=472$), and 28.8% agreed that ***Jobseeker supplements*** were helpful ($n=292$). No other ALMP scored above 20% in terms of helpfulness although it should be noted some, for example the Boost Apprentice Commencements Scheme, might only appeal to specific sectors and businesses.
- Alternatively, 38.2% and 54.3% of respondents reported that ***JobKeeper payments*** and ***Jobseeker supplements*** were either irrelevant or they were not aware of these programs.
- Moreover, on average two thirds of the sample reported that all the other ALMPs were either irrelevant or were not aware of

Although these ALMPs, with the possible exception of ***JobKeeper payments*** which was highly publicised and accessible, these findings could be of interest to policy makers regarding the appropriateness, and awareness, of ALMPs during times of crisis relative to target populations.

1.3.2 Business Support/Market Incentives Related Interventions and Others

We also sought to further understand the tourism industry, and workforce's, take-up and awareness of a range of other **supply and demand side policy interventions** (see Figure 12).

- Among business support interventions, the most useful intervention was the ***Boosting Cash Flow (tax-free) for businesses*** scheme (25.6% rated useful), followed by the ***Business Events Grants Program*** (17.9% rated useful), the ***Queensland Small Business Digital Grants Program*** (16.3% rated useful), and the ***SME Recovery Loan Scheme*** (15.3% rated useful).

² Whitsundays had too low response rates to draw any inferences

- Among market incentives, the most useful intervention, as perceived by the respondents, was the **ANZ/NZ Travel Bubble** (37% rated useful), followed by the COVID-19 **Consumer Travel Support Program** (25.1% rated useful) and the **Queensland Holiday Dollars Travel Voucher Scheme** (25.1% rated useful).
- All things considered, the most useful interventions the sample reported that assisted COVID recovery was **Borders Reopening** (65.7% rated useful) and the **Vaccination Program** (65.3% rated useful).
- Besides the reported helpfulness of the **Borders Reopening** policy and the **Vaccination Program**, on average over two thirds of the sample reported that the various schemes and programs were either irrelevant or they were not aware of these programs.

Again, these findings could be of interest to policy makers and industry stakeholder groups regarding the appropriateness, and awareness, of a range of policies and supply side interventions during times of crisis, relative to target populations.³

³ It should be noted some schemes, for example the Queensland Small Business Digital Grants Program, and the Victorian support package would be relevant, or known, to limited number of the survey respondents.

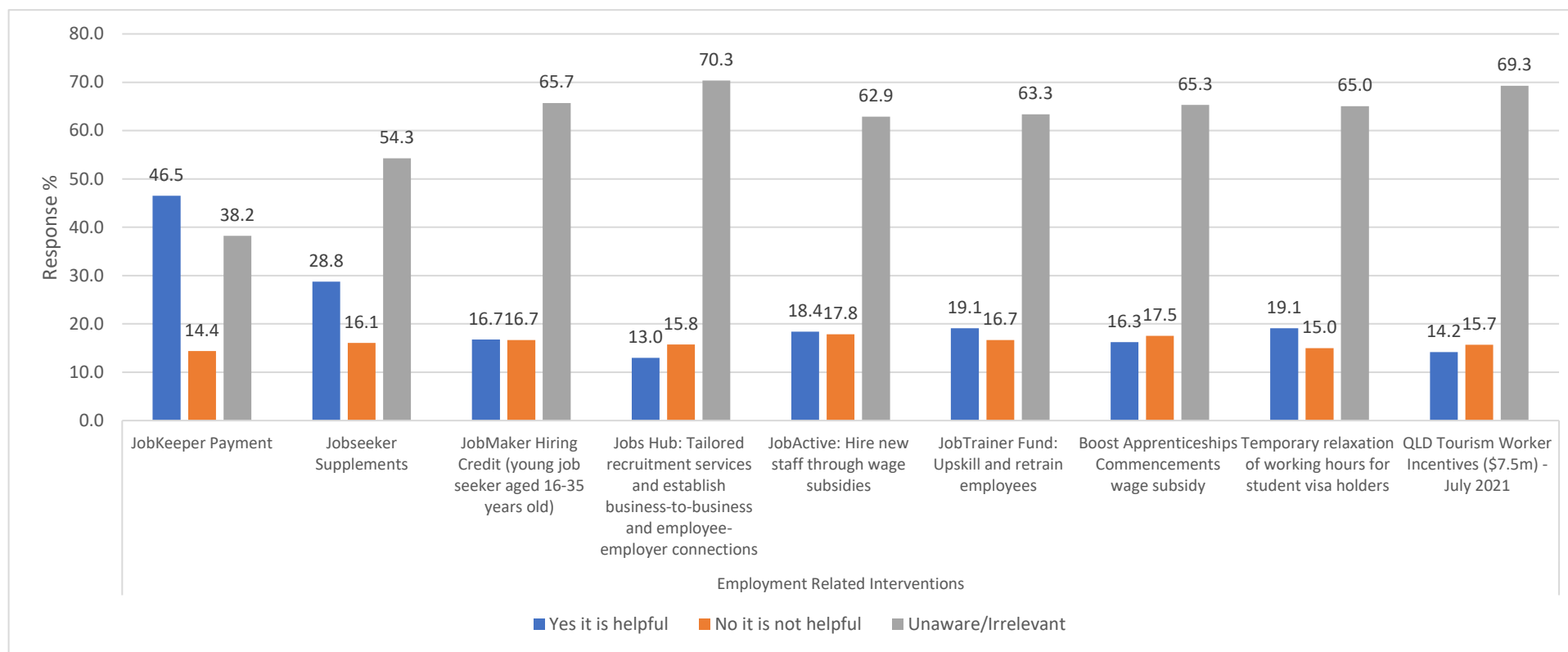


Figure 11 Usefulness of Employment Related Interventions (%)

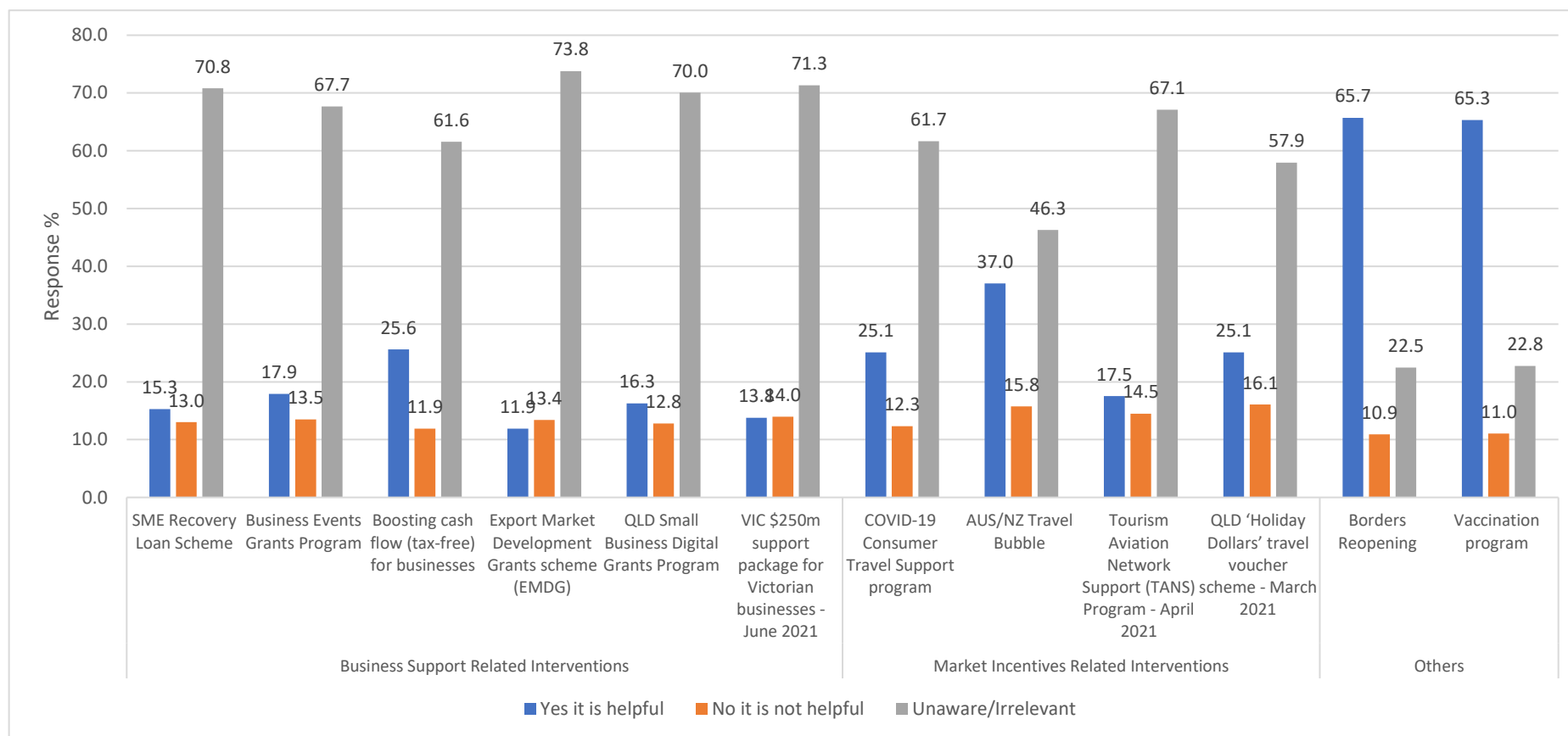


Figure 12 Usefulness of Business Support/Market Incentives and Other Interventions (%)

2. AIM 2

2.1 CONCEPTUAL MODEL TESTING

2.1.1 Correlation Analysis

The second major aim of the survey was to test several scientific measures of resilience, and proposed predictors of resilience, to better understand what factors contribute to both employee and organisational resilience building. ***This section is quite technical. Readers may prefer to move straight to section 2.2,*** which reports on the applied findings based on this technical reporting.

The model proposed three pathways (see Figure 1), each of which posed a question:

- Pathway 1: What individual resources contribute to employee resilience building?
- Pathway 2: What organisational resources and strategies/changes contribute to organisational resilience building, and
- Pathway 3: What organisational resources contribute to employee resilience building?

Initially, we looked at the correlations between factors, or variables. These show ***relationships*** between factors, but do not indicate causality. The results (see appendices) showed that:

- Path 1 (Individual level, see appendices, Table 2) correlation results indicate that employee resilience was ***positively related*** to trait resilience and emotional intelligence.
- Contrarily, employee resilience was ***negatively related*** to depression/anxiety/stress (DASS).
- Trait resilience had a ***moderate negative correlation*** with DASS, and a ***moderate positive relationship*** with emotional intelligence.
- The results showed that emotional intelligence and trait resilience had a ***higher coefficient*** with employee resilience and DASS, while the direct relationship was ***relatively weak*** between employee resilience and DASS.

These results confirm relationships between the key resilience, and resilience-related, variables as would be expected from the scientific literature, and provides confidence for the other analyses we report later in this report.

- Path 2 (organisational resilience) (see appendices, Table 3) had a ***strong possible correlation*** with organisational strategy and organisational change.
- Organisational resilience also had a ***moderate positive association*** with organisational learning culture, perceived organisational support, and employee empowerment.
- Organisational learning culture also had a ***strong positive relationship*** with perceived organisational support.

These results again confirm relationships that would be expected according to the scientific

literature. However, the results suggest organisational resilience could be enhanced by stronger organisational strategy and organisational change.

These results also indicate that organisational resilience could be future enhanced by improved by a good learning culture, strong organisational support and by empowering employees.

- Path 3 (organisational-individual level) (see appendices, Table 4) employee resilience had ***positive relationships*** with different types of organisational resources: organisational learning culture, perceived organisational support, and employee empowerment.

These results suggest that various organisational resources are related to employee resilience (see summary results updated in Figure 1-2 below).

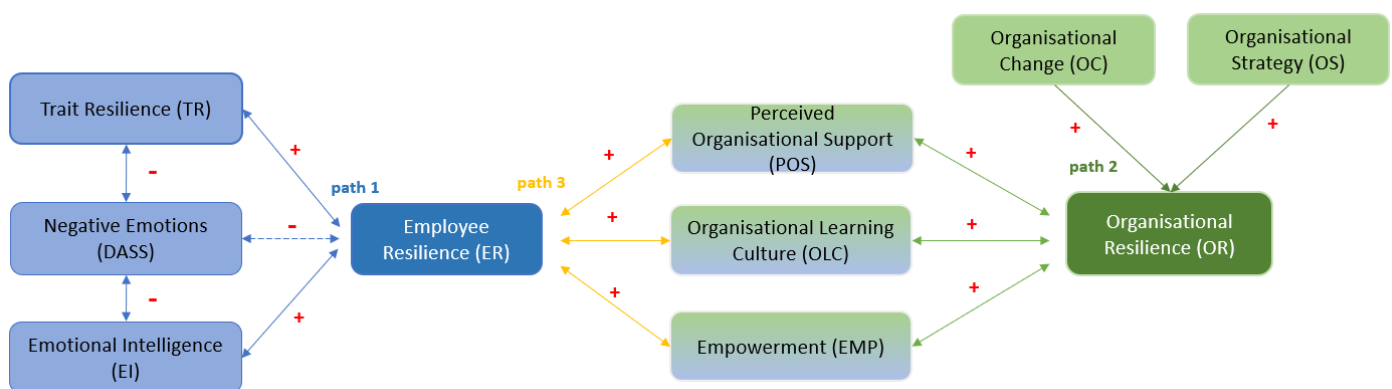


Figure 1-2 Tourism Employee and Organisation Resilience Model (Summary Results)

2.1.2 Regression Analysis

Building on the correlations analyses which showed **relationships** between key resilience and resilience-related factors, we then conducted regression analyses. Regression analyses demonstrate the **impact** of one variable on another.

- For Path 1, individual resources that contribute to employee resilience building, a simple linear regression was used to test if trait resilience, DASS, and emotional intelligence significantly impacted employee resilience. The overall regression was **statistically significant**. Specifically, emotional intelligence and trait resilience **significantly impacted** employee resilience. DASS had a **relatively weak influence** on employee resilience.
- Regarding path 2, organisational resources and organisational strategy/change that contribute to organisational resilience building, a simple linear regression was used to see if organisational learning culture, organisational strategy, and organisational change significantly impacted organisational resilience. The overall regression was **statistically significant**. Specifically, organisational strategy and organisational change **significantly impacted** organisational resilience. However, organisational learning culture had a **relatively weak influence** on organisational resilience.
- For path 3, organisational resources that contribute to employee resilience building, again simple linear regression was used to see if organisational learning culture, perceived organisational support, and empowerment significantly impacted employee resilience. The overall regression was **statistically significant**. Specifically, empowerment and organisational learning culture **significantly impacted** employee resilience. Perceived organisational support had a **relatively weak influence** on employee resilience.

In summary, the regression analyses suggest that 1) emotional intelligence and trait resilience build employee resilience, 2) organisational resources and organisational strategy/change contribute to organisational resilience building, but that learning culture somewhat lagged in the sample, and 3) organisational learning culture, perceived organisational support, and empowerment significantly impacted employee resilience building, however, employee resilience could be enhanced by stronger organisational support amongst the sample.

2.2 EMPLOYEE & ORGANISATIONAL RESILIENCE ANALYSIS

This section considers the resilience and resilience-related factors, tested in the results of section 2.1, against a range of other survey items.

We found significant **gender differences** in terms of resilience.

- The mean (M) female employee resilience is ***significantly higher*** than that of male employees' resilience (see Figure 13).

This result could inform support strategies for organisations in readiness for, or during, crises.

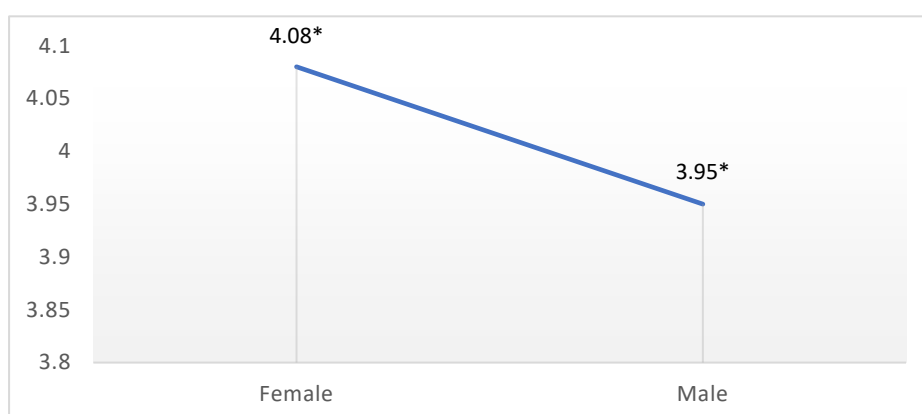


Figure 13 Employee Resilience Level vs Gender (Mean)

JobKeeper was the key active labour market policy intervention during COVID-19.

- There was a ***significantly higher*** employee resilience for respondents with JobKeeper payments than people without JobKeeper payments (see Figure 14).

This underscores the broader value of JobKeeper because given employee resilience is an individual level trait the increased resilience spills over into other life domains, for example family and community.

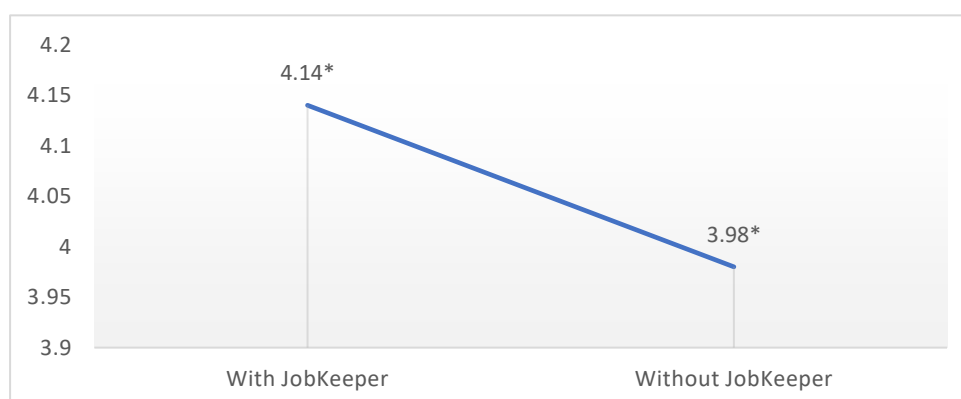


Figure 14 Employee Resilience Level vs JobKeeper Access (Mean)

We also tested for the effects of **employment status** on employee resilience (see Figure 15). We found that:

- employee resilience of respondents who were unemployed and/or not look for work is **significantly lower** than for respondents who have contracts either full-time, part-time casual or zero contract (e.g., Deliveroo workers). The mean response for all other employment status were higher than the unemployed and/or not look for work category.

This suggests any form of employment is better than none for individual resilience.

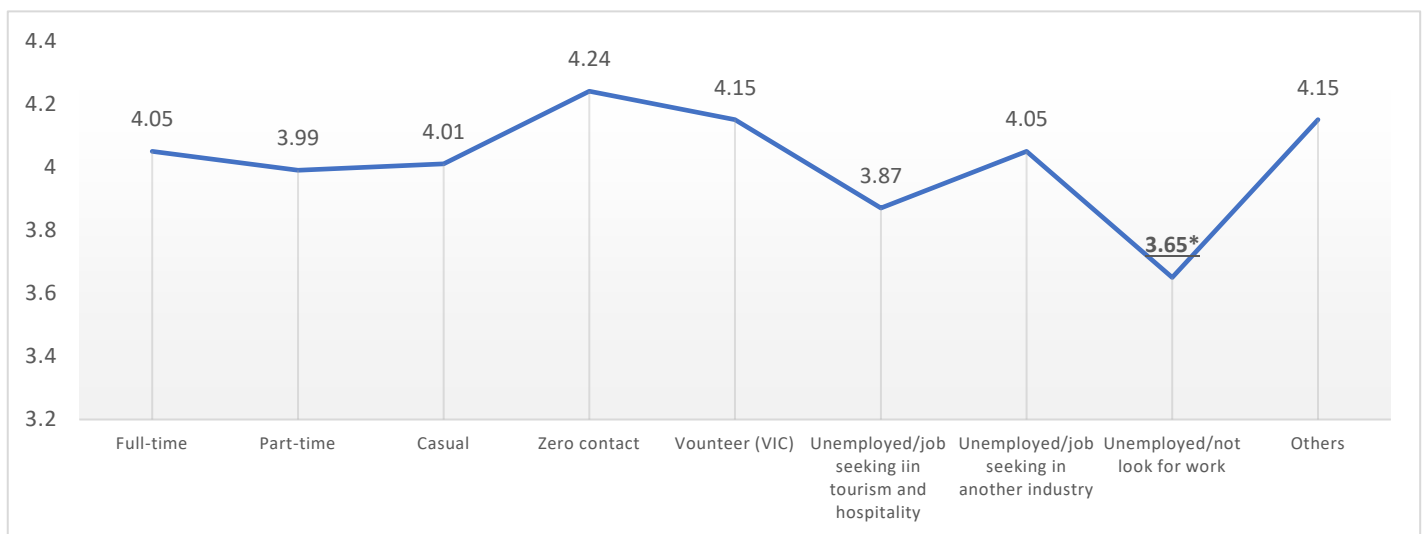


Figure 15 Employee Resilience Level vs Employment Status (Mean)

Our analysis also considered how **employee resilience and organisational resilience** compared **between States**. We fund that Queensland fared very well.

- Employee resilience (see green bars in Figure 16) for Queensland respondents was **significantly higher** than employee resilience in New South Wales, Victoria, and South Australia.
- Similarly, organisational resilience (see orange line in Figure 16) for Queenslanders was **significantly higher** than organisational resilience in New South Wales, Victoria, and South Australia and the Australian Capital Territory.

These results are likely explained by the shorter periods of lockdown Queenslanders experienced in contrast to the main southern States, despite extended border closures.

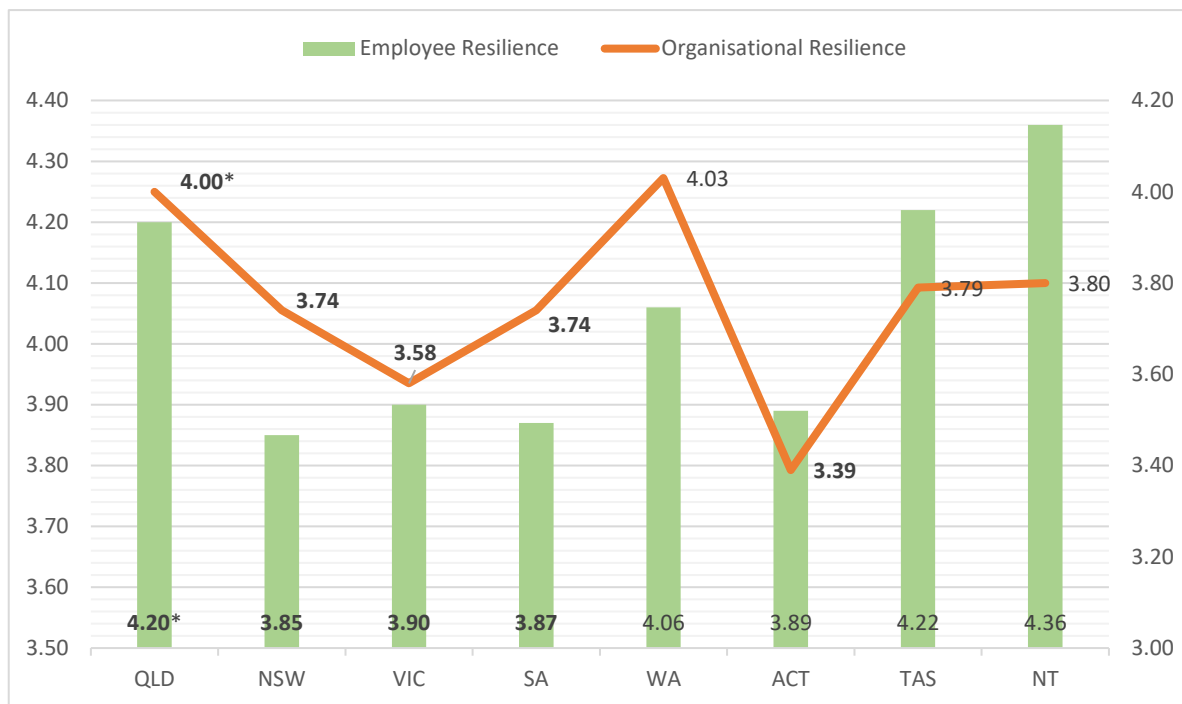


Figure 16 State Comparison – Mean (ER and OR)

These analyses were repeated, for employee resilience and organisational resilience, as a **factor of organisational size** (see Figure 17).

- There were ***no significant*** differences for employee resilience/organisational resilience for organisations in different sizes.
- Overall, however, medium organisations had the lowest employee resilience and organisational resilience; while large organisations had the highest employee resilience and organisational resilience, in our sample.

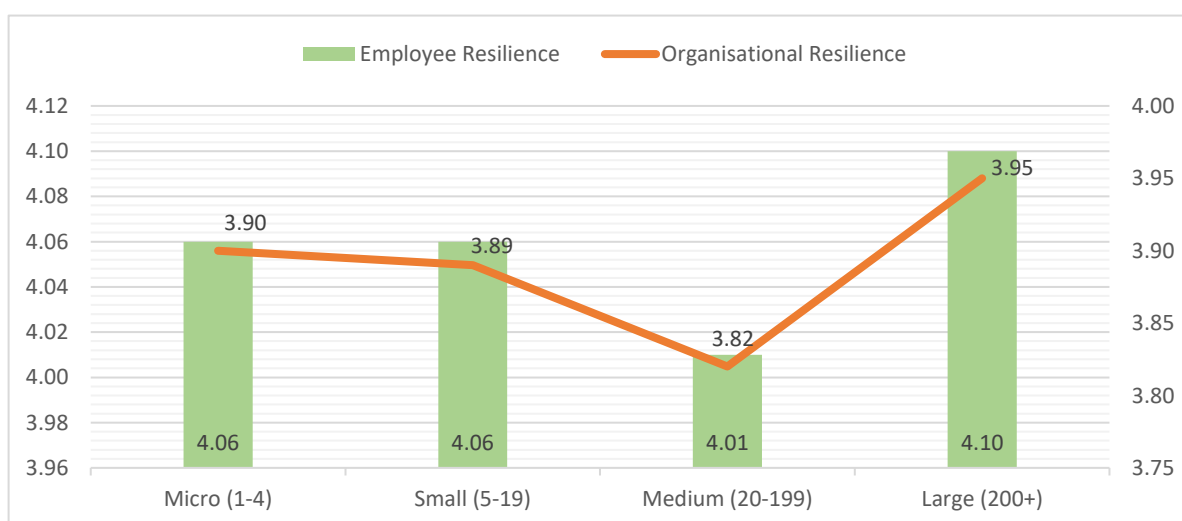


Figure 17 Organisational Size Comparison – Mean (ER and OR)

While the size of the business didn't seem to significantly affect employee resilience and organisational resilience, the **age of the business** seemed to matter (see Figure 18). We found that:

- Organisations operating less than one year and between 5-10 years, had lower employee resilience than organisations operating between 11-20 years, and over 20 years, but the significance was only marginal.
- There was ***no significant difference*** in organisational resilience for organisations of different ages (operating years).

This result could inform targeted business support in future crises.

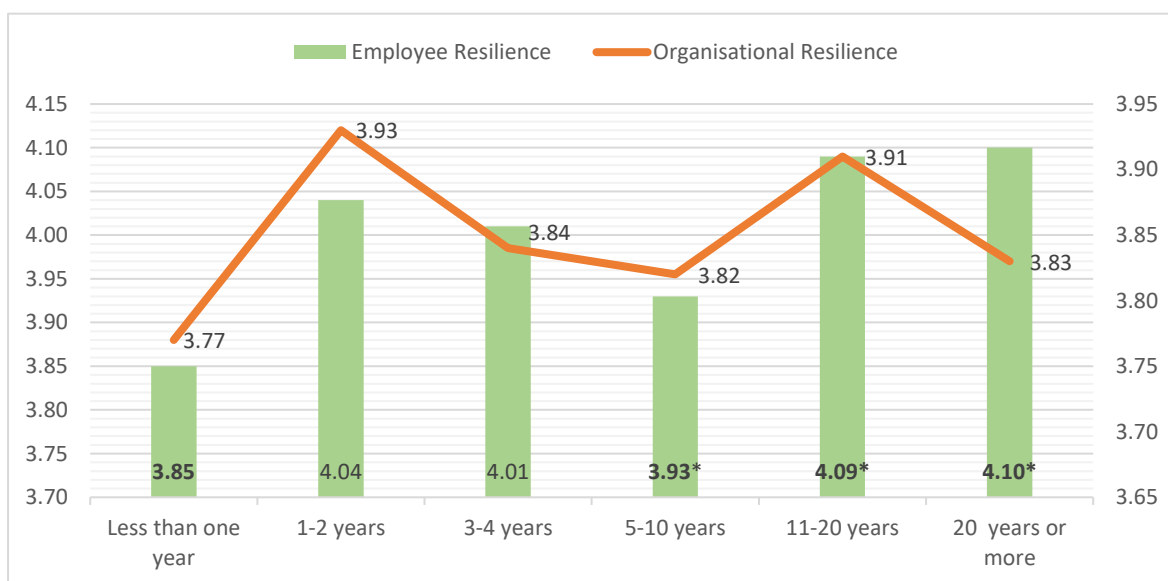


Figure 18 Organisational Age Comparison – Mean (ER and OR)

3. SECTOR DIFFERENCES (THREE SECTORS)

A key focus of this project was to investigate the resilience of three specific tourism sectors, accommodation, food service and retail. Our survey captured data from many tourism sectors and so allowed for rich inter-sector comparisons (see Figure 19). Nonetheless, in total the survey received 43% of its responses from these three sectors.

- Accommodation ($n=155$, 15%), food (and drink) service ($n=218$, 21%) and retail ($n=73$, 7%).

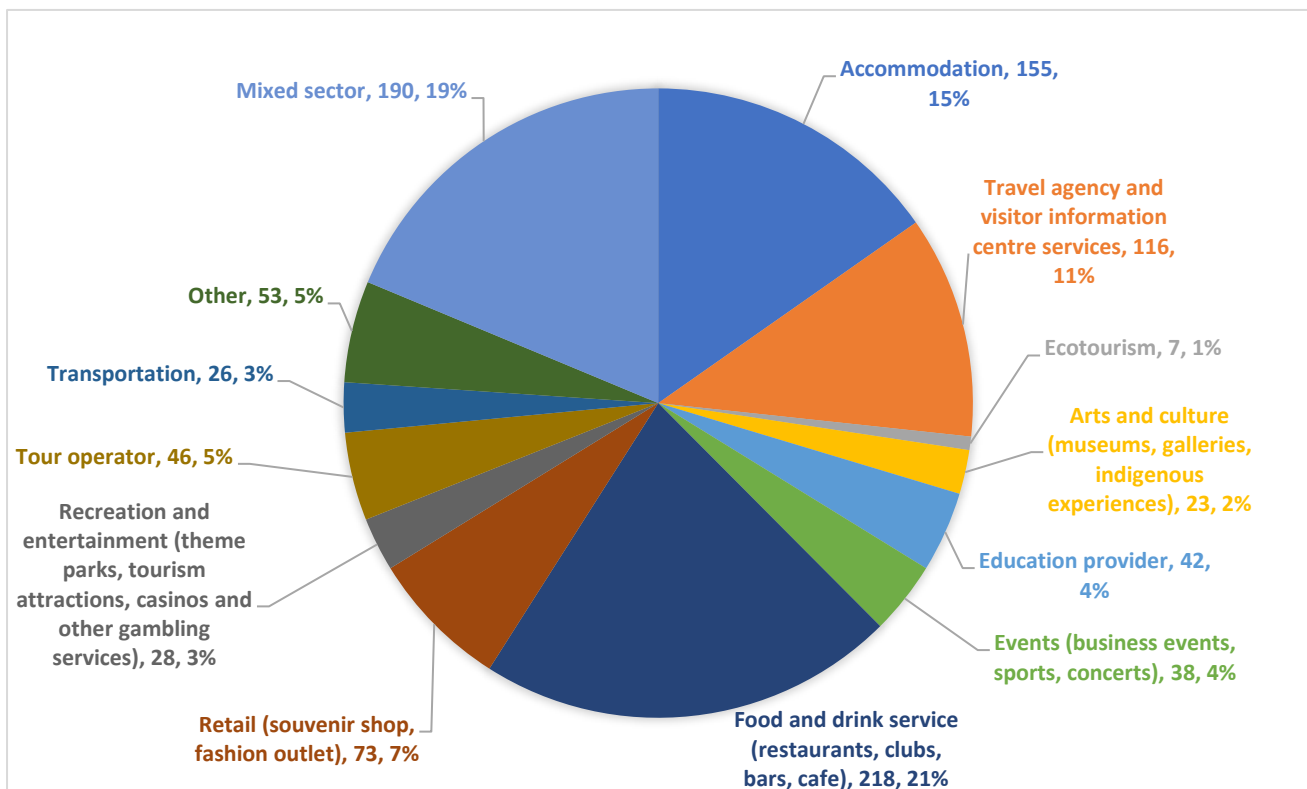


Figure 19 Industry/Sector Summary (n, %)

3.1 DESCRIPTIVE OVERVIEW OF THREE SECTORS

To better understand the sector characteristics, we explored **gender and age distributions** (see Figure 20). We found that:

- Women heavily dominated in accommodation and food service, but the workforce was of equal gender distribution in retail. In terms of employees' age there were marked differences:
- Accommodation was characterised by a classic U-curve, perhaps suggesting a quantum of younger workers at line-level and of mature supervisors/managers.
- Food service shows a classic bell curve, with the highest cohort of workers in the 25-34 age group, as would be expected.
- Contrarily, retail shows a skew towards younger workers and may explain subsequent results regarding inter-sector resilience levels.

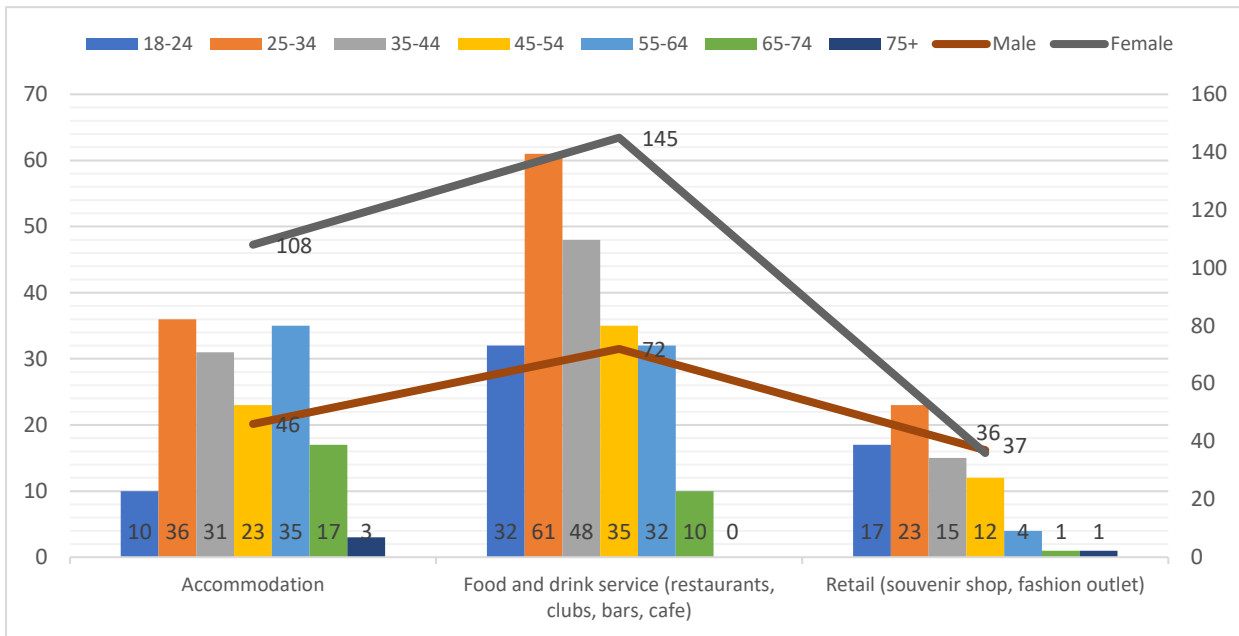


Figure 20 Age and Gender Distribution - N (Three Sectors)

For employment status (see Figure 21), accommodation employed proportionately more full-timers compared to the levels of contingent employment in food service and retail. Food service also had more unemployed workers than the other sectors.

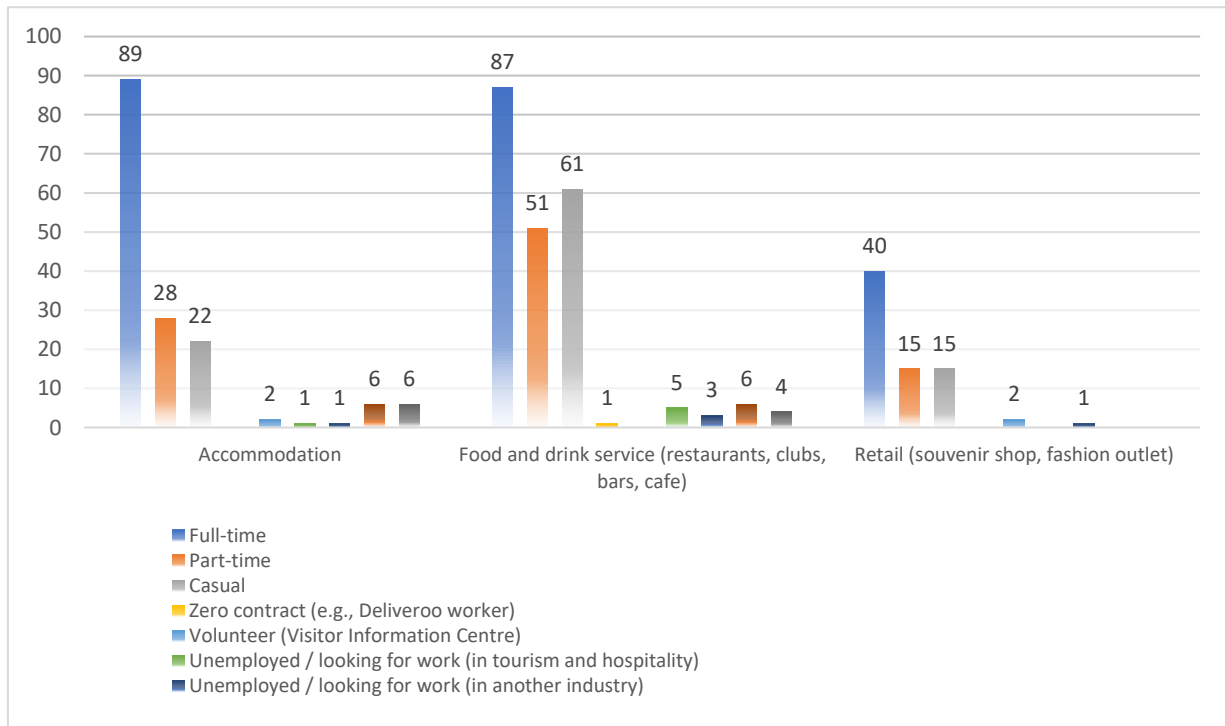


Figure 21 Employment Status - N (Three Sectors)

A comparison between the sectors in terms of accessing **JobKeeper** was conducted (see Figure 22). The results showed that:

- More respondents across all sectors did not access JobKeeper.
- The highest levels of not accessing take-up were in food service and retail, and likely a result of higher levels of contingent employment than accommodation (see Figure 21)

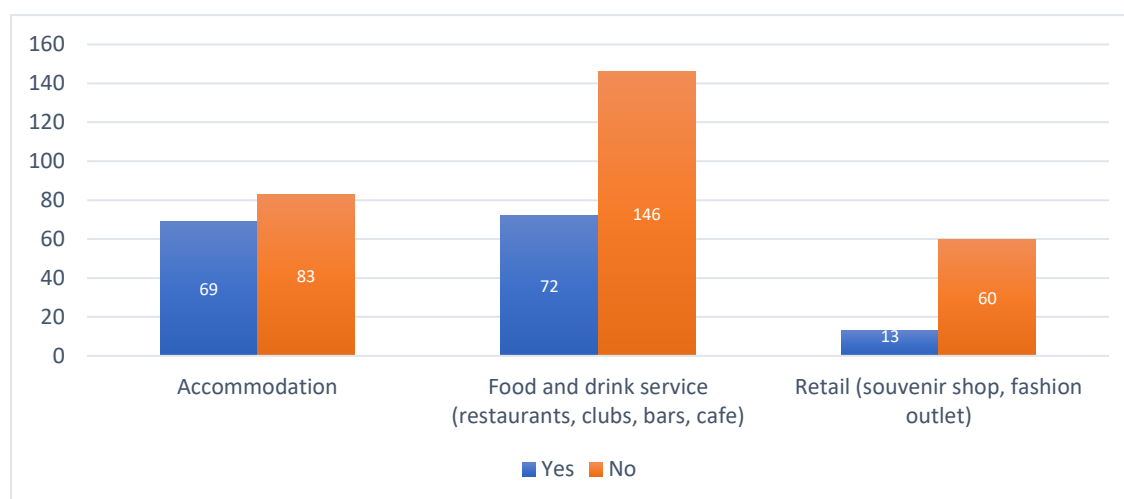


Figure 22 Access to JobKeeper – N (Three Sectors)

3.2 EMPLOYEE AND ORGANISATIONAL RESILIENCE (THREE SECTORS)

Returning to the focal point of this project, resilience, we conducted a sector comparison regarding employee resilience and organisational resilience (see Figure 23). The results showed:

- Employee resilience in the retail sector ($M=3.67$) is **significantly lower** than employee resilience in the accommodation and the food service sector.
- Among all sectors, the tour operator sector and travel agency and visitor information centre (VIC) sector had the highest employee resilience, although not statistically significant.
- On the other hand, organisational resilience in the accommodation sector ($M=3.94$) was **significantly higher** than organisational resilience in the retail and food service sectors.
- Among all sectors, the tour operator, transportation sector, ecotourism sector and travel agency and VIC sectors had the highest organisational resilience.

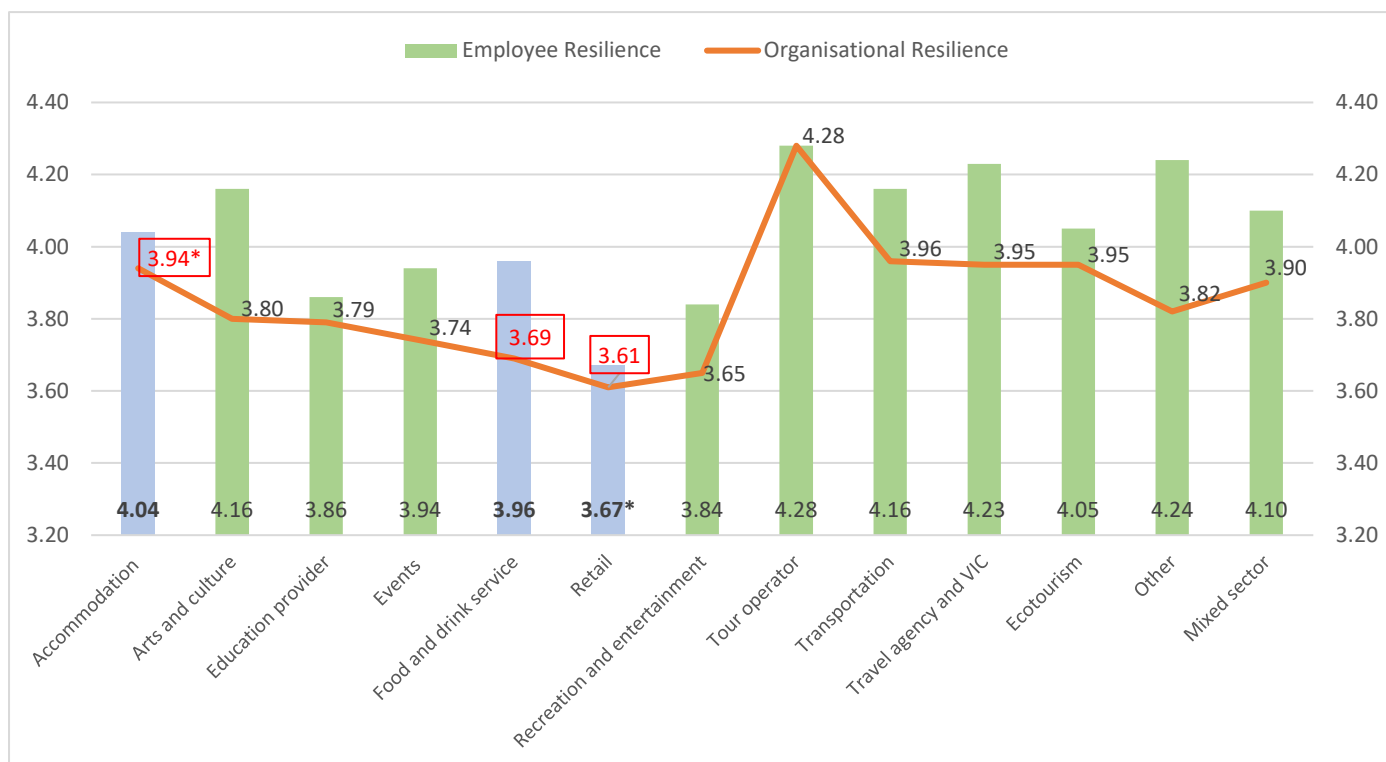


Figure 23 Sector Comparison – Mean (ER and OR)

3.3 OTHER VARIABLES (THREE SECTORS)

We then looked to consider other resilience-related variables and compare scores across the three sectors of interest. The three variables we tested for were **Trait Resilience, Distress, Anxiety and Stress (DASS), Emotional Intelligence**, at the employee, or individual level. The three variables we tested for at the organisational level were **Organisational Learning Culture, Perceived Organisational Support, and Empowerment**.

At the employee (individual level) the results (see Figure 24) showed:

- Employee trait resilience in the retail sector was **significantly lower** than trait resilience in both the accommodation and food service sectors.
- Similarly, the DASS level of employees in the retail was **significantly higher** than the DASS level in the accommodation and food service sectors.
- On the other hand, emotional intelligence of employees in the accommodation sector is **significantly higher** than emotional intelligence of employees in the food service and retail sectors.

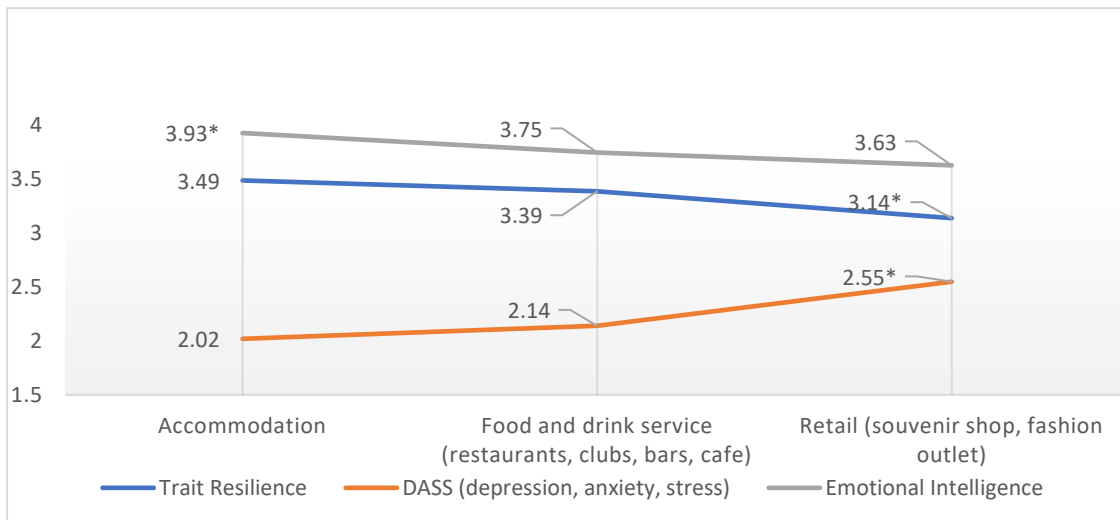


Figure 24 Employee Attributes – Mean (Other Variables – Three Sectors)

At the organisational level the results (see Figure 25) showed:

- Organisational learning culture in the accommodation sector was ***significantly higher*** than that in the food service and retail sectors.
- Employees perceived organisational support in the accommodation sector was ***significantly higher*** than that in the food service and retail sectors.
- Similarly, employee's empowerment levels in the accommodation sector were ***significantly higher*** than that in the food service and retail sectors.

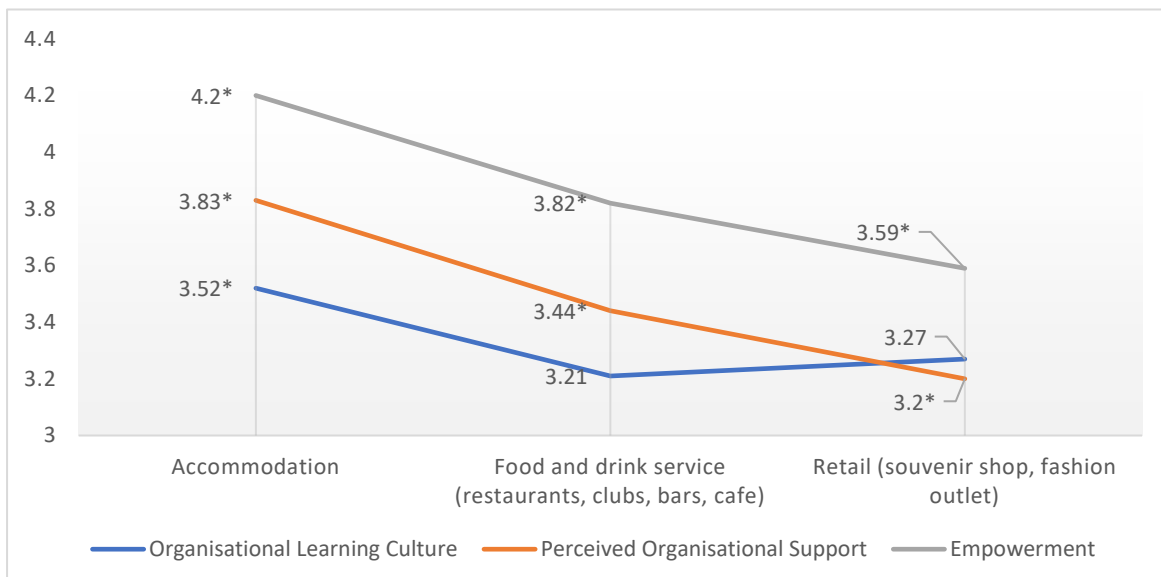


Figure 25 Organisation Attributes – Mean (Other Variables – Three Sectors)

4. REGIONAL DIFFERENCES (FIVE RTOS)

Our final set of statistical analyses was to compare results across our regions of focus for this project: Gold Coast, Tropical North Queensland, Southern Queensland Country, Outback Queensland and Whitsundays, noting the low response rate of the latter (see Figure 26). We begin by reporting some of the descriptive characteristics. Figure 26 shows the number of responses received from each RTO.

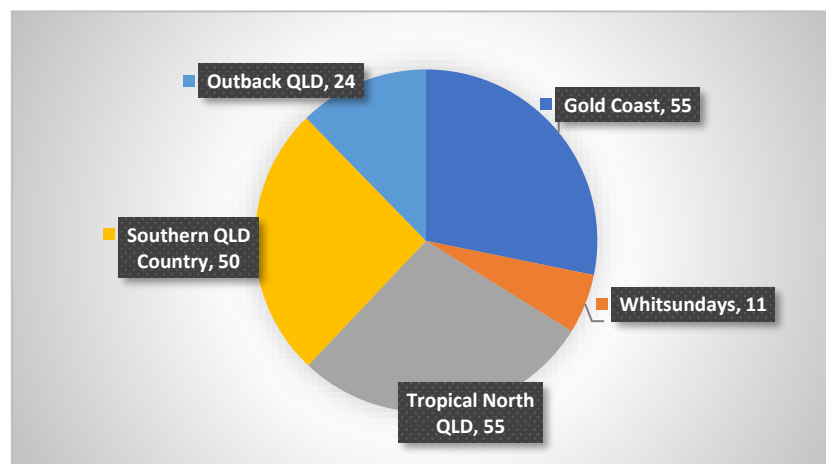


Figure 26 Five RTOs Sample (N)

4.1 DESCRIPTIVE OVERVIEW OF FIVE RTOS

Figure 27 shows the **age and gender distribution across the five regions**. Overall, more females than males responded to the survey, and the age distribution of Southern Queensland Country was slightly older than the other four regions.

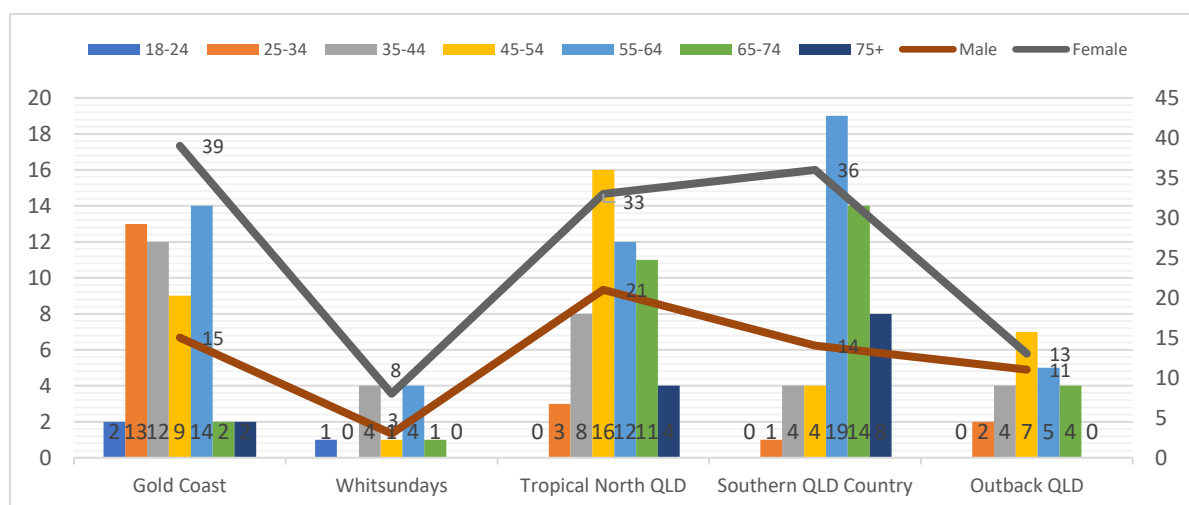


Figure 27 Age and Gender – N (Five RTOs)

Figure 28 considers the relationship between **organisational size, age, and the regions**. Most business in all regions cluster as small or medium, as is consistent with tourism business size, and a surprising number of mature businesses are represented in the five-region sample.

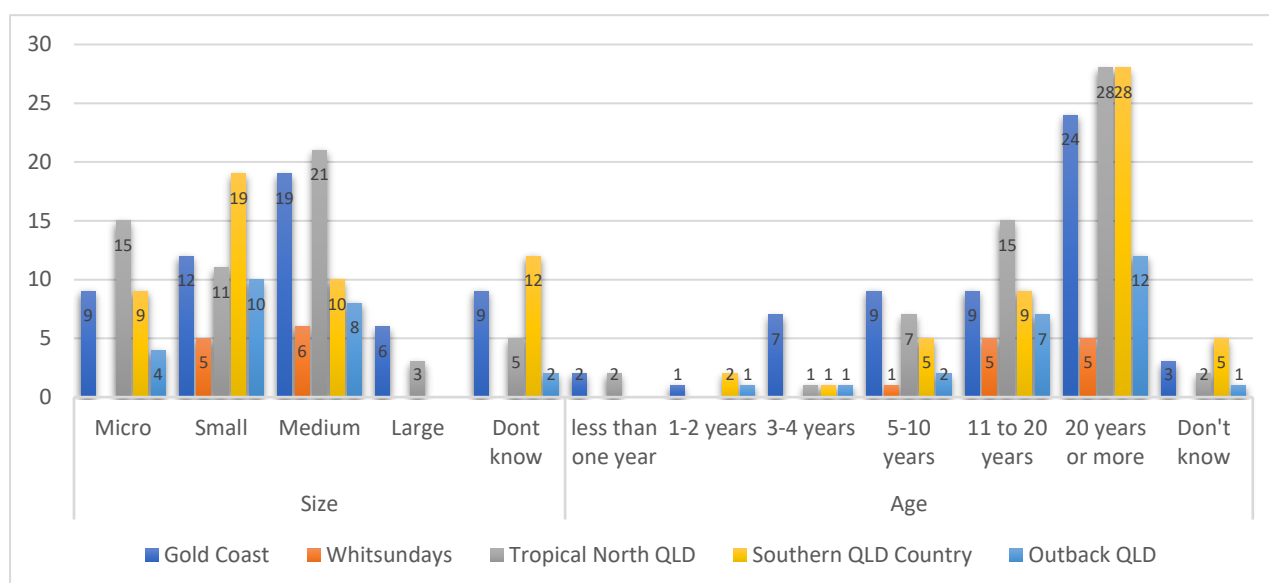


Figure 28 Organisation Size and Age – N (Five RTOs)

Employment status across the regions shows a strong representation of fulltime workers, with large cohorts of volunteers responding from Tropical North Queensland and Southern Queensland Country (see Figure 29).

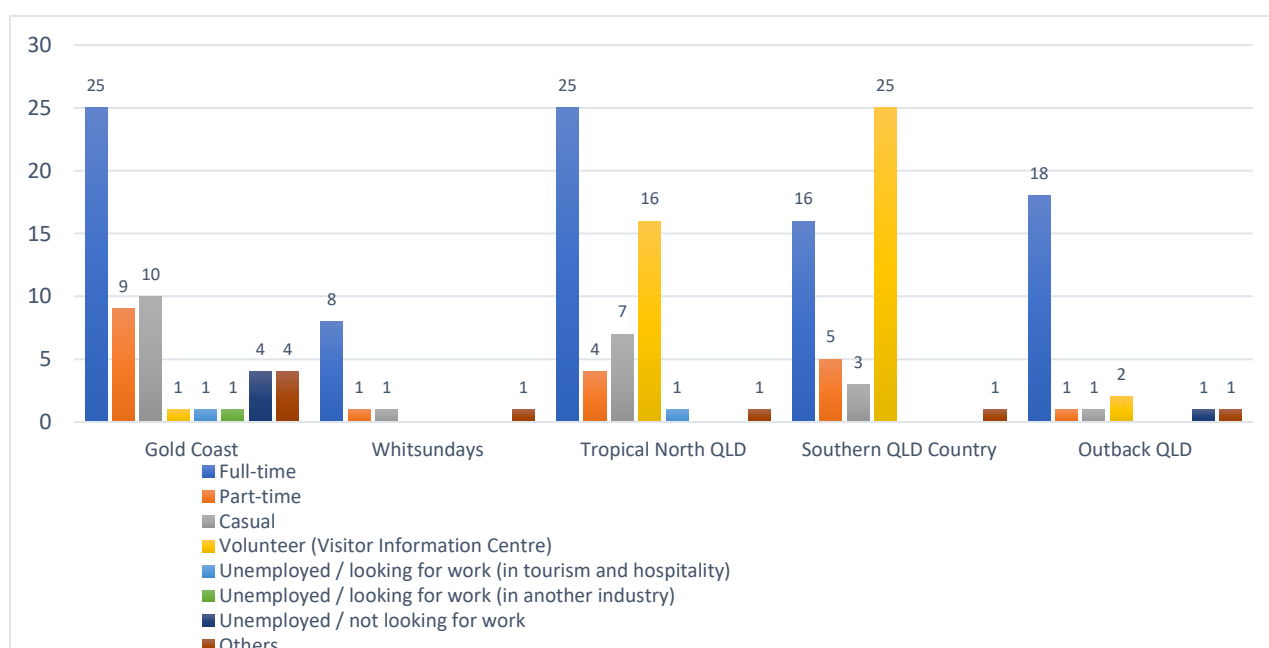


Figure 29 Employment Status – N (Five RTOs)

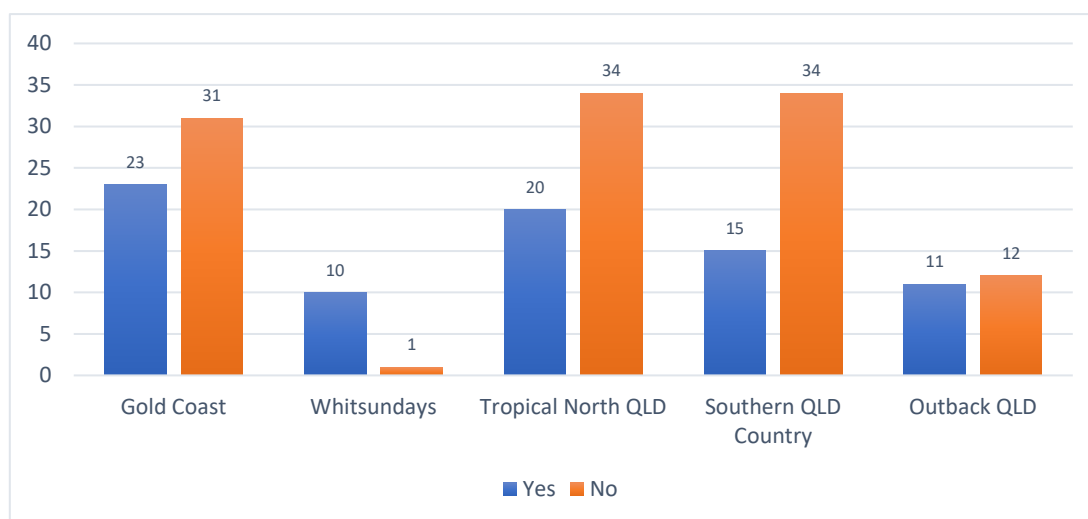


Figure 30 Access to JobKeeper – N (Five RTOs)

Only the Whitsundays (mindful of low response rates) reported greater access to JobKeeper than not (see Figure 30), with the other four regions somewhat mirroring the whole of sample results reported in Figure 11.

4.2 EMPLOYEE AND ORGANISATIONAL RESILIENCE (FIVE RTOs)

Our analysis then moved on to consider how the **resilience and resilience-related variables** (reported in section 2.1), differed as a function of region (see Figure 31).

- Tropical North Queensland had the ***highest employee resilience score***, and Southern Queensland Country had the ***highest organisational resilience score***.
- There were ***no significant differences*** of employee resilience/organisational resilience between the five regions.
- However, it noteworthy that all these five regions' employee resilience and organisational resilience levels were ***higher than "all other regions" in Australia***.
- Specifically,
 - o Tropical North Queensland employee resilience was ***significantly higher*** than all other regions.
 - o Southern Queensland Country's organisational resilience was ***significantly higher*** than all other regions, as was Tropical North Queensland and Outback Queensland.

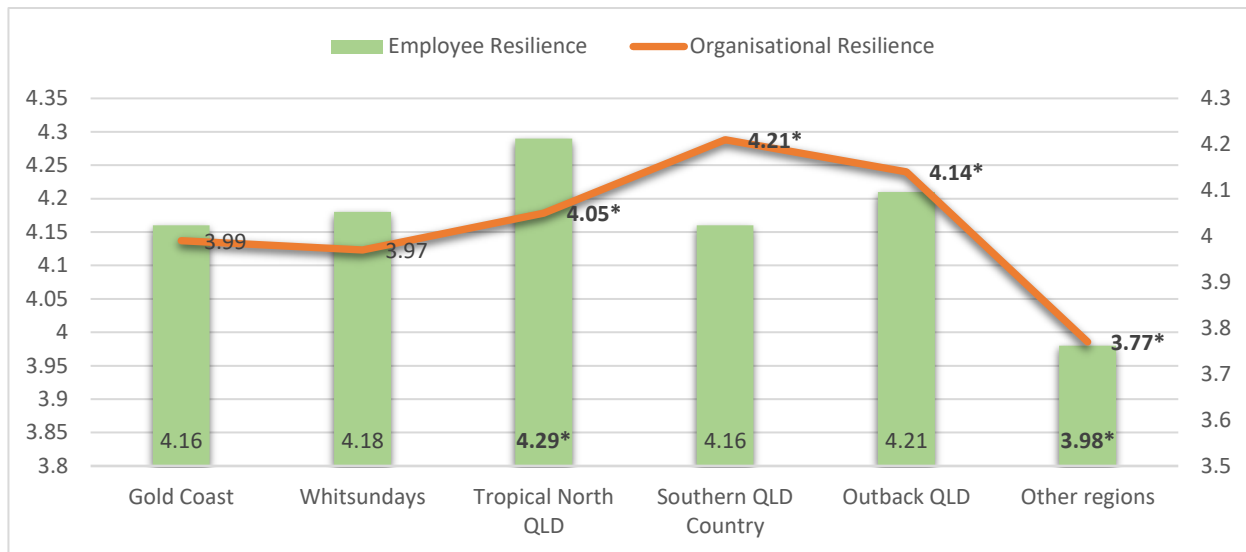


Figure 31 Regional Comparison – Mean (ER and OR)

4.3 OTHER VARIABLES (FIVE RTOs)

We then considered specific individual (employee level) resilience and resilience related factors: trait resilience, DASS, and emotional intelligence (See Figure 32).

- There was ***no significant difference*** of employees' trait resilience across the five RTO regions, but all these five regions' employees' trait resilience level were ***higher*** than all "other regions".
- Employees' DASS level in the Whitsundays region was highest, which is marginally ***significantly higher*** than Southern Queensland Country and Outback Queensland.
- There was ***no significant difference*** of employees' emotional intelligence across the five RTO regions, but on average, they are ***all higher*** than all "other regions".

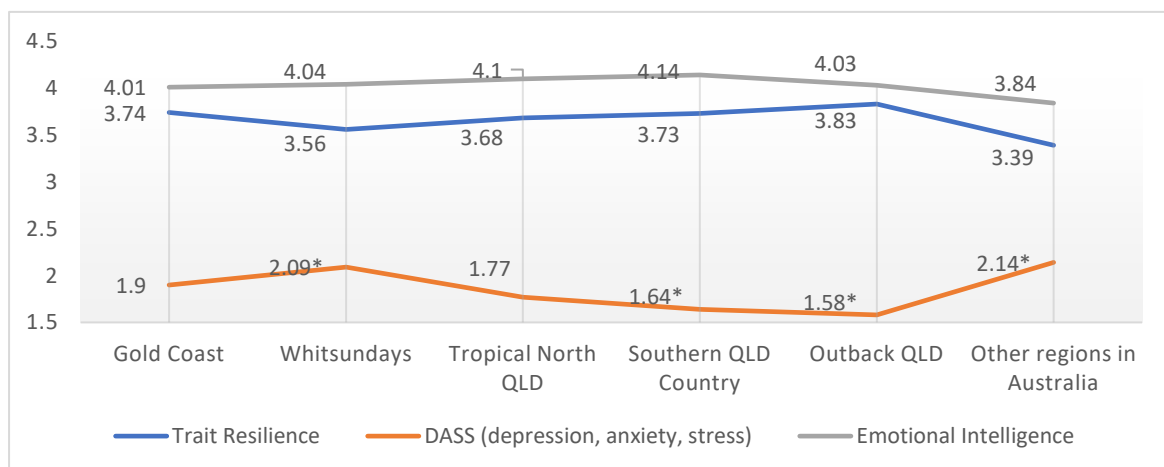


Figure 32 Employee Attributes – Mean (Other Variables – Five RTOs)

Next, we considered specific organisational level factors: organisational learning culture, perceived organisational support, and empowerment (See Figure 33).

- Organisational learning culture in the Gold Coast region was ***slightly (significantly) lower*** than that in Tropical North Queensland and Southern Queensland Country.
- Perceived organisational support in Gold Coast region was ***significantly lower*** than Tropical North Queensland, Southern Queensland Country, and Outback Queensland.
- Furthermore, employees' empowerment levels in the Gold Coast region were ***significantly lower*** than Outback Queensland. Other regions had no significant difference.

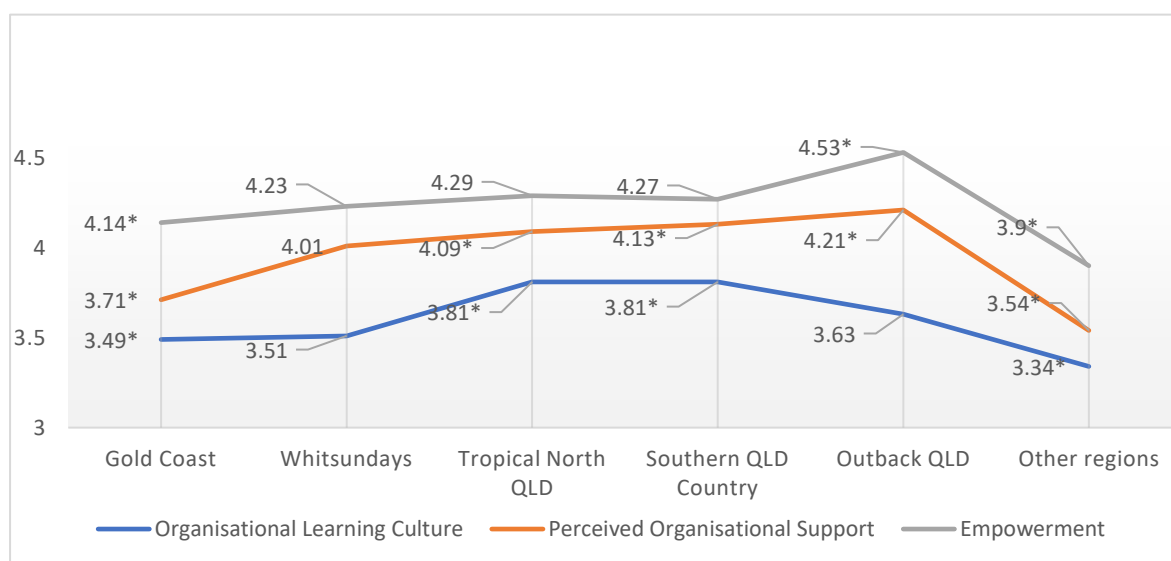


Figure 33 Organisation Attributes – Mean (Other Variables – Five RTOs)

5. ADDITIONAL COMMENTS

The final question of the survey was open-ended, that is asking respondents if they had anything further to add. 137 respondents provided additional meaningful comments. Below we group the comments under 'parent' sub-headings.

5.1 KEY CHALLENGES

Industry development and tourism futures

- **Small/micro business** in tourism needs more **funding grants** e.g., funding to help micro business assist their **local region business**, bringing the **younger generations** to the tourism sector.

Gem quote

“as the older generation are starting to wind their businesses up... ‘cause younger generation not taking over”

Labour shortages

- **Shortages of skilled workers** because of no overseas travel, **especially chefs and cooks**
- **Struggled to employ staff** after reopening (difficult to find employees when required)
- Please **expedite the visa or PR of those working in hospitality** as a whole - you may open the borders, but you do not have people to work.
- **Building trust** in the hospitality industry amongst **job seekers**. We are struggling to find **quality candidates** to fill roles
- We have people apply but did not turn up for interview (assuming they are using the **jobseeker system**) that only requires them to show apply.
- The new assistance of allowing **students to work more than 38 hours** does NOT really help at all. It has been challenging and those in this sector are **exhausted** and seeking government help.
- **Employers supporting** opportunities needed to **develop locals for vacancies**

Gem quote

“[The] hospitality industry, providing accommodation and services, needs more people.”

Access to supports

- **Micro business**, with turnover <\$75K, have **no employees**, seldom qualifies for grants
- **Relax conditions** on government funding
- **Casual workers** are not eligible for any government help; good to see if JobKeeper program can involve casuals who have been at their job for a certain amount of time.
- Assistance for **sole operators** is lacking in assistance programs; Stronger financial assistance to **sole traders** who do not employ staff but employ contractors.
- **Events industry** has not been considered for extra support, but everyone acknowledges we are the hardest hit
- **Memberships** to organisations are very expensive for small businesses. It's impossible to get help and support from the industry without membership. No guidance on COVID-19 rules and regulations for any business unless you are a member to an industry [body].
- More attention to the financial impact of lockdowns on the **museums volunteer sector**

Gem quote

“As a smaller [events] operator, I have faced near bankruptcy over the past few months and have felt hog tied by the unrealistic restrictions of 1 per 4sm rule and no dancing.”

Information Communication

- Need **coordinated effort** of all the help and support programs
- Government to **update their website information faster** so that we can access **current facts** relating to covid rules and regulations
- More clarity and understanding of **medical advice to public** as to **reasons** borders are closed and understand the **impact** on the public
- More **clarity from the government** in relation to rules around decisions, as we have to **argue rules with customers** around restrictions as they are not clear on them or properly educated on these.

Gem quote

“Feel very overwhelmed and bombarded by constant messaging”

5.2 LOOKING FORWARD

Living with COVID

- **Border-reopen** (consistent rules) is crucial for travel
- All state representatives work together and sort out an **exemption for individuals doing the right thing (have been vaccinated)** to get an exemption for family emergencies (e.g., rapid COVID tests at airports)
- **Vaccination Passports** available to everyone
- **Reflection and addressing mistakes error** an employee makes so that they can learn and do better next time

Gem quote

“Bring the workforce back into office”

Financial support

- Bring back **JobKeeper**/Extension of **JobKeeper** type payments for Tourism businesses affected
- Assistance for **fixed costs** such as insurances/rentals/permits

- Repeat **holiday voucher** campaign again
- Bring back **cash flow boost** to businesses reliant on international tourism

New industry opportunities

- Restart **cruise tourism**
- **Health tourism** opportunities

6. BEST POLICY, ORGANISATIONAL & EMPLOYEE RESILIENCE PRACTICES

Overall, the studies find that Queensland employees and organisations are remarkably resilient compared to other (populous) states. This underscores the effectiveness of various policies and the role of advocacy bodies in listening and supporting the tourism industry and the proactive adaptability of operators on the ground. The below best practices emerged from the first year of the study and were interpreted via best practice in both the public domain and academic literature.

6.1 POLICY

- Although they are pre-existing characteristics of the tourism workforce a renewed focus on creating a **positive image for careers**, for **skills development, training and education** would enhance the industry's workforce resilience and recovery
- Investment in skills, training and education is likely to filter down to hiring organisations, which the study shows are more resilient if they have an **organisational 'learning culture'**
- Workforce resilience, for employees and operators, draws from **non-work domains**, for example, family and social supports, community well-being and access to basics, such as affordable housing, infrastructure and community supports. Policy that enhances these non-work resilience domains will likely have **spill-overs effects to work-based (employee and organisational) resilience**
- Consistent messaging, leadership and supports from policymakers is critical, for the tourism workforce, in times of crisis
- **Universal Active Labour Market Policies** (ALMPs) appear **more effective**, and awareness is greater, than for more bespoke policies (i.e., JobKeeper and Jobseeker supplements). **JobKeeper directly and significantly positively impacted workforce resilience**
- **Relaxation of visa holder working hours** and the **JobTrainer Fund** both had traction with tourism workforce stakeholders, with a fifth stating **these policies were useful**
- Universal market incentives similarly have a stronger cut-through than more bespoke policies. Plans to **reopen borders**, the **AUS/NZ travel bubble** and **vaccination program rollouts were most helpful**

- Bespoke policies appear to have less cut-through, although the tax-free 'boosting cash flow', COVID-19 Consumer Travel Program and Queensland 'Holiday Dollars' voucher scheme ***all had strong effectiveness***.
- Other targeted evaluations may show effectiveness. For example, ***targeting at-risk cohorts*** (e.g., the unemployed/those not looking for work)
 - ***regions*** (e.g., Outback for labour shortages, Tropical North Queensland, and Gold Coast for market incentives) and
 - ***sectors*** (e.g., retail workers)

6.2 ORGANISATIONS

- Tourism is a notoriously complex industry. While this suggests solutions are not simple, working 'with complexity' can provide myriad solutions – for collaboration and adaptability
- Organisations with ***learning, change and strategic cultures had the highest resilience***. Developing and support these cultures can be the ***key to adaptability***, providing businesses with the ***knowledge and 'soft' tools*** to pivot between different markets to both ***enhance resilience and gain competitive advantage***
- Businesses that ***provide workers agency***, via upskilling, development, and empowerment, enhance employees' organisational commitment
- ***Mature and larger businesses*** (e.g., accommodation providers) ***are more resilient*** than younger and smaller businesses
- ***Women are more resilient than men*** but hold the most precarious positions in the workforce
- Flexibility (numerically and functionally) have been traditional hallmarks of tourism employment. Businesses that find ***the balance of 'Flexibility and Fit'*** by considering the needs and wants of their employees as well as the needs of the business, will enjoy ***more committed and loyal employees***
- Creating ***sustainable employment is the key to worker retention*** both within organisations but also within the industry. ***Unsustainable employment leads to worker leakage*** from tourism to other sectors of the economy.

6.3 EMPLOYEES

- ***Any form of work, even if actively job-seeking, improves resilience***. Full-time work (and volunteering) lead to higher employee resilience than contingent (casual or part-time) employment. Being unemployed, AND giving up on seeking work, negatively impacts resilience
- Employees should actively ***seek out and access ALMP incentives*** – programs like ***JobKeeper significantly positively impact individual resilience***
- Employees should actively ***seek out and access mental health and well-being supports***, via Employee Assistance Programs (EAPs), or, if their organisations do not offer them, other social and community services
- Employee resilience is ***best in large and mature organisations*** and so they could be considered as 'employers of choice'

- ***Retail workers are at risk***, likely because the sector is dominated by contingent workers and the sector is more likely to be highly dependent on international markets. Retail workers displayed low levels of trait resilience and higher levels of depression, anxiety and stress (DASS)
- ***Accommodation provided the best outcomes for employee resilience***, with workers reporting a better learning culture, organisational support and employee empowerment compared to other sectors

GLOSSARY OF KEY TERMS

Mean	The mean is the average of the numbers
Significance	Statistical significance refers to the claim that a result from data generated by testing or experimentation is not likely to occur randomly or by chance but is instead likely to be attributable to a specific cause.
Employee Resilience	<p><i>Individual perspective:</i> a self-regulatory process involving inner regulation leading to personal growth in reaction to traumatic workplace hardships, occurrences, and experiences.</p> <p><i>Organisational perspective:</i> an organisation's capability to quickly react and adapt to internal and external threats to its workforce.</p>
Organisational Resilience	An organisation's ability to persist and withstand external environmental changes (preparation), mitigate and cope with negative effects caused by the changes (response), and bounce forward to a new state for better future performance (recovery).
JobKeeper Scheme	Payment The JobKeeper Payment scheme was a subsidy for businesses significantly affected by coronavirus (COVID-19).
Trait Resilience	Trait resilience examines how individual's approach and react in general to events that they experience to be negative and considers their ability to recover from these negative events.
DASS (Depression, Anxiety, Stress)	The DASS is a set of three self-report scales designed to measure the negative emotional states of depression, anxiety, and stress.
Emotional Intelligence	Emotional intelligence is defined as the "ability to monitor one's own and others' feelings and emotions, to discriminate among them, and to use this information to guide one's thinking and actions.
Organisational Learning Culture	A learning culture is a collection of organisational conventions, values, practices, and processes. An organisation with a learning

culture encourages continuous learning and believes that systems influence each other.

Perceived Organisational Support	Perceived Organisational Support refers to employees' perception concerning the extent to which the organisation values their contribution and cares about their well-being.
Empowerment	Empowerment is defined as sharing knowledge, information and power with subordinates and improving the feeling of self-efficacy of employees.
Organisational Strategy	A plan that specifies how the business will allocate resources (e.g., money, labour, and inventory) to support infrastructure, production, marketing, inventory, and other business activities.
Organisational Change	Actions in which a business alters a major component of its organisation, such as its culture, the underlying technologies or infrastructure it uses to operate, or its internal processes.

APPENDICES

Table 2 Correlation Analysis (Path 1)

		Employee_Resilience	Trait_Resilience	DASS_ALL	Emotional_Intelligence
Employee_Resilience	Pearson Correlation	1	.309**	-.162**	.468**
	Sig. (2-tailed)		<.001	<.001	<.001
	N	1015	1013	1015	1015
Trait_Resilience	Pearson Correlation	.309**	1	-.489**	.486**
	Sig. (2-tailed)	<.001		<.001	<.001
	N	1013	1013	1013	1013
DASS_ALL	Pearson Correlation	-.162**	-.489**	1	-.403**
	Sig. (2-tailed)	<.001	<.001		<.001
	N	1015	1013	1015	1015
Emotional_Intelligence	Pearson Correlation	.468**	.486**	-.403**	1
	Sig. (2-tailed)	<.001	<.001	<.001	
	N	1015	1013	1015	1015

** . Correlation is significant at the 0.01 level (2-tailed).

Table 3 Correlation Analysis (Path 2)

		Organisational_Learning_Culture	Perceived_Organisational_Support	Empowerment	Organisational_Resilience	Organisational_Strategy	Organisational_Change
Organisational_Learning_Culture	Pearson Correlation	1	.710**	.500**	.517**	.528**	.609**
	Sig. (2-tailed)		<.001	<.001	<.001	<.001	<.001
	N	1013	1013	1013	1009	1006	1010
Perceived_Organisational_Support	Pearson Correlation	.710**	1	.561**	.506**	.531**	.624**
	Sig. (2-tailed)	<.001		<.001	<.001	<.001	<.001
	N	1013	1014	1014	1009	1006	1010
Empowerment	Pearson Correlation	.500**	.561**	1	.430**	.456**	.512**
	Sig. (2-tailed)	<.001	<.001		<.001	<.001	<.001
	N	1013	1014	1015	1009	1006	1010
Organisational_Resilience	Pearson Correlation	.517**	.506**	.430**	1	.792**	.734**
	Sig. (2-tailed)	<.001	<.001	<.001		<.001	<.001
	N	1009	1009	1009	1009	1005	1008
Organisational_Strategy	Pearson Correlation	.528**	.531**	.456**	.792**	1	.789**
	Sig. (2-tailed)	<.001	<.001	<.001	<.001		<.001
	N	1006	1006	1006	1005	1006	1006
Organisational_Change	Pearson Correlation	.609**	.624**	.512**	.734**	.789**	1
	Sig. (2-tailed)	<.001	<.001	<.001	<.001	<.001	
	N	1010	1010	1010	1008	1006	1010

** . Correlation is significant at the 0.01 level (2-tailed).

Table 4 Correlation Analysis (Path 3)

		Organisational_Learning_Culture	Perceived_Organisational_Support	Empowerment	Employee_Resilience
Organisational_Learning_Culture	Pearson Correlation	1	.710**	.500**	.365**
	Sig. (2-tailed)		<.001	<.001	<.001
	N	1013	1013	1013	1013
Perceived_Organisational_Support	Pearson Correlation	.710**	1	.561**	.367**
	Sig. (2-tailed)	<.001		<.001	<.001
	N	1013	1014	1014	1014
Empowerment	Pearson Correlation	.500**	.561**	1	.400**
	Sig. (2-tailed)	<.001	<.001		<.001
	N	1013	1014	1015	1015
Employee_Resilience	Pearson Correlation	.365**	.367**	.400**	1
	Sig. (2-tailed)	<.001	<.001	<.001	
	N	1013	1014	1015	1015

** . Correlation is significant at the 0.01 level (2-tailed).

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ACKNOWLEDGEMENTS

Gaining responses for surveys, especially at times of profound disruption, is extremely challenging. The research partners are deeply grateful to all those tourism champions who took the time to complete the survey and who encouraged their staff and networks to do likewise.

We are particularly grateful to The Tourism Group, Queensland Hotels Association, the Queensland Government's Young Tourism Leaders network, DWS Hospitality Specialists and market consultants, PureProfile, for administering the survey to their members and networks.

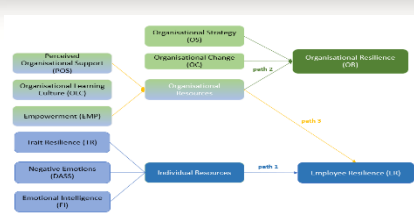
The survey's success also relied on the generous assistance of Daniel Gschwind, Brett Kapernick and many of their dedicated staff, and interns, at Queensland Tourism Industry Council.

We also wish to acknowledge the expert statistical advice provided by our University of Queensland colleague, and PhD student extraordinaire, Ms Hongmin Yan.



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