



QUEENSLAND
TOURISM INDUSTRY
COUNCIL

The Voice of Tourism

DIGITAL DISRUPTION

QTIC External -
Project Scoping Document

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Project Summary

The aim of this project is to develop a digital workforce and training plan for the Queensland tourism industry that identifies gaps in digital uptake among industry members, the impact and implication of new technology on the industry, and the opportunities that technology presents to enhance destination experiences.

The Queensland Tourism Workforce Plan identifies that the tourism industry is comprised of 51,276 businesses. The tourism industry employs more than 225,000 people both directly and indirectly. Whilst the clusters of tourism businesses and employment are greatest in Brisbane, Gold Coast and Cairns, two thirds of people directly employed in tourism are employed outside the Brisbane region. The businesses across the tourism industry range from transport companies, hotel chains, theme parks and retail stores, to family owned visitor attractions and cafes.

The industry identifies a shift towards the use of digital technology by consumers in the conceptualisation, planning and sharing of their travel experiences. Recent research indicates that 53% of connected consumers would consider themselves “lost” without the internet (Euromonitor, 2018). Due to increasing consumer demand, there is increasing need for tourism employees and business operators to have skills in digital technology to support the connection with visitors across all stages of their planning and journey lifecycles.

To understand the current position of the digital competencies of the tourism industry, QTIC proposes consultation across all 13 tourism regions, with a sample of small, medium and large employers across the state, to establish a Queensland Tourism Digital Workforce Plan that identifies the:

- extent of current engagement with digital technologies among operators and employees;
- current workforce skills needs and current skills deficiencies;
- impacts and implications the introduction of digital technologies has had on the workforce;
- technologies that promote opportunities in efficiencies and economic benefits to operators and state GSP;
- technologies that offer opportunities to enhance customer attraction, access, experiences and satisfaction;
- likely return on investment at varying stages of embracing digital technology;
- reason for digital technology adoption and the outcomes of introduction;
- barriers to implementation;
- opportunities for businesses and regions.

On completion of the Queensland Tourism Digital Workforce Plan QTIC, will provide the following deliverables to the Department of Employment, Small Business and Training:

- case studies of successful engagement with digital technologies;
- a report of skills needs related to digital technologies and opportunities for funded training.

Furthermore, QTIC will provide recommendations related to:

- vet investment;
- non-accredited training opportunities.

Another important outcome of this work will be to identify preferred supplier digital technology providers and support networks that can service the tourism industry that will:

1. increase attraction through digital marketing;
2. increase bookings through automation;
3. increase occupancy, consumer spend and state GSP;
4. improve consumer experiences;
5. promote entrepreneurship and innovation with the tourism industry;
6. create jobs through enhanced engagement opportunities.

Implementing digital technologies involves major investment, long-term decisions, and time –all of which the SMEs across the tourism industry consider lacking. However, the benefits of competitiveness create global opportunities for business growth. Through understanding and addressing the skills needs within the industry, these businesses weaknesses will be able to be addressed.

Servicing Industry and Employer Needs

The Queensland Tourism Digital Workforce Plan will identify the required digital workforce capabilities related to:

- new and emerging job roles and tasks;
- specified training needs;
- existing accredited and non-accredited training available;
- the need for additional course development;
- the need for additional VET investment (additions or amendments to VET subsidy list);
- current and future labour supply;
- exploring the social content needed to attract and create aspirational travel;
- collaboration and marketing packaged experiences leading to multi-user payments;
- use of social media to create a digital presence and augment marketing developed by state agencies.

The Queensland Tourism Digital Workforce Plan will identify and promote the awareness of existing and emerging digital technologies and skilling to the broader industry.

QTIC will promote the benefits of embracing and engaging with digital technologies to industry using case studies and community tourism digital champions. This will be achieved through:

- regional consultation;
- working with industry leaders to develop case studies and best practice strategies;
- working with, and showcasing, regional community tourism digital champions;
- identifying additional tourism digital champions;
- developing and implementing digital technologies to enhance consumer offerings and experiences.

The Queensland Tourism Digital Workforce Plan will align with the Advancing Queensland Strategy and the Tourism Workforce Plan to create growth by raising awareness among industry related to the organisational benefits of digital technologies including:

- presenting industry with achievable outcomes using digital technologies;
- showcasing the potential return on investment;
- identifying how digital technology can provide efficiencies and streamline operational tasks;
- demonstrating ways to enhance quality of customer service and experiences by adopting digital technologies;
- ways to increase organisations competitiveness.

The Queensland Tourism Digital Workforce Plan will support the delivery of the following government priorities and strategies;:

Advance Queensland

- [Community Digital Champions](#);
- [Advancing Small Business Queensland](#).

Advancing Tourism Strategy

- develop high quality, innovative products and experiences;
- improve the customer-focused service culture and experience;
- increase the digital capabilities and connectivity of tourism businesses.

Tourism Workforce Plan

- 3.4 Promote to employers the skill sets for entrepreneurship and digital tourism already available in the Training Package.
- 3.5 Fund skill sets (such as entrepreneurship and digital communications) as well as relevant qualifications to meet the industry's skilling requirements through the VET Investment Plan.

In order to scope the validity of the Queensland Tourism Digital Workforce Plan QTIC surveyed industry to identify the interest in digital technology. To date QTIC has received 34 responses across varying sectors of the tourism industry with results indicating the need for a plan that supports the industry development in digital technology.

Tourism and Events Queensland's Best of Queensland Experience program assessment of 2,223 business using data from the Australian Tourism Data Warehouse (ATDW) supports the need for a statewide Queensland Tourism Digital Workforce and Training plans. It identified 61% of businesses are not effectively using social media and 36% of businesses do not have an online booking option.

Environmental Scan

Undertake an environmental scan of national and Queensland policy, associated programs and/or activity related to digital technology and the tourism industry including:

- identify and notate best practice activity related to the use of digital technology in tourism businesses;
- research and identify extent of current engagement with digital technologies among operators and employees;
- research and identify current workforce skills needs and current skills deficiencies;
- research and identify current funded and non-funded training opportunities;
- research and identify impacts and implications from the introduction of digital technologies on the workforce;
- research and identify technologies that promote opportunities in efficiencies and economic benefits to operators and state GSP;
- research and identify technologies that offer opportunities to enhance customer attraction, access, experiences and satisfaction;
- research and identify return on investment at varying stages of embracing digital technology;
- research and identify tourism digital champions.

Consultation

As a key outcome of the consultation, a Queensland Tourism Digital Workforce and Training plans will be developed that will highlight the key training needs of the industry. This will facilitate an opportunity for QTIC to engage with its corporate partner TAFE Queensland to develop a training strategy that reflects the outcomes of the plan and reflects industry needs that can be rolled out across Queensland on completion of this contract.

The consultation phase of the project will include:

- a minimum sample of 100 Queensland tourism industry operators across thirteen defined tourism regions;
- identify current use of digital technologies;
- identify skilling needs and opportunities;
- promote the benefits of investing in and implementing digital technologies to the organisation, community and broader industry;
- identify the extent of current engagement with digital technologies among operators and employees;
- identify current workforce skills needs and current skills deficiencies;
- identify impacts and implications the introduction of digital technologies has had on the workforce;
- identify and promote technologies that promote opportunities in efficiencies and economic benefits to operators and state GSP;
- identify and promote technologies that offer opportunities to enhance customer attraction, access, experiences and satisfaction;
- promote the likely return on investment at varying stages of embracing digital technology;
- promote the reason for digital technology adoption and the outcomes of its introduction;
- identify and develop strategies to mitigate barriers to implementation;
- promote opportunities for businesses and regions;
- promote existing government priorities and strategies relating to digital technology;
- promote the awareness of existing training and support available;
- work with industry leaders to develop case studies and best practice strategies;

- influence industry to develop and implement digital technologies to enhance consumer offerings and experiences.

The consultation session will create opportunities for QTIC to discuss with industry the levels of engagement with digital technology, the barriers to engagement, and the opportunities available. These consultations will act as a catalyst to build awareness and to start industry on a journey to enhanced adoption of digital technology.

The engagement with industry will facilitate the identification of groups of early adopters, trend followers, and those that are falling behind in the adoption of technology. The sharing of stories and industry-wide engagement creates opportunities for industry members to network and learn from one another through the showcasing of success stories and the articulation of common challenges facing industry.

The consultation will also provide an opportunity to showcase regional community ***tourism digital champions*** to industry that will evidence the successful application of digital technologies. This generates a sense of hope, demonstrating that implementation is a real opportunity with tangible outcomes that benefit businesses.

Consultation will include face-to-face workshops within five prominent regions in cooperation with the relevant Regional Tourism Organisations (RTOs). Further research will be undertaken with the remaining eight RTOs with the use of surveys, telephone and digital forums.

Regional Tourism Organisations

- Gladstone Area Promotion and Development Ltd
- Tourism Tropical North Queensland
- Bundaberg North Burnett Tourism
- Southern Queensland Country Tourism
- Gold Coast Tourism
- Tourism Whitsundays
- Townsville Enterprise Limited
- Fraser Coast Tourism and Events
- Outback Queensland Tourism Association
- Townsville Enterprise Limited
- Mackay Tourism Ltd
- Capricorn Enterprises
- Brisbane Marketing Ltd

Tourism Digital Workforce and Training Plan

Consultation across all 13 tourism regions with a sample of small, medium and large employers across the state to create a Queensland Tourism Digital Workforce Plan identifies the:

- extent of current engagement with digital technologies among operators and employees;
- current workforce skills needs and current skills deficiencies;
- impacts and implications the introduction of digital technologies has had on the workforce;
- technologies that promote opportunities in efficiencies and economic benefits to operators and state GSP;
- technologies that offer opportunities to enhance customer attraction, access, experiences and satisfaction;
- likely return on investment at varying stages of embracing digital technology;
- reason for digital technology adoption and the outcomes of introduction;
- barriers to implementation;
- opportunities for businesses and regions.

On completion of the tourism digital workforce plan QTIC will provide the following deliverables to the Department of Employment, Small Business and Training:

- case studies of successful engagement with digital technologies;
- development of a Queensland Tourism Digital Training Plan with training needs identified and opportunities for funded training.

Project Activities and Schedule

Key Activities	Start Date	Completion Date
Environmental Scan	01/10/2018	01/11/2018
Consultation	01/11/2018	28/02/2019
Development of the Queensland Tourism Digital Workforce and Training plans with training needs identified.	01/11/2019	01/03/2019

Table 1 – Key Project Activities and Schedule

Payments

Key Activities	Allocated Budget	Distibution
<ul style="list-style-type: none"> Environmental Scan and Consultation Development of a Queensland Tourism Digital Workforce and Training plans 	Maximum of \$50,000 + GST	External Consultant(s) \$50,000
Travel and Accommodation		QTIC to organise and manage
Room Hire and catering for consultation		

Project Outcomes

The anticipated outcomes from the development and implementation of the Queensland Tourism Digital Workforce Plan include;

- job creation and/or career advancement;
- increased visitation leading to employment opportunities and productivity;
- training to use new technology;
- training to develop new skills and knowledge;
- change management strategies;
- new policies and procedures or amendments to existing documents;
- provide mechanisms for tourism businesses to maintain digital currency in a disruptive environment;
- enhanced customer service, customer interactions and customer experiences (i.e. housekeeping software);
- simple booking process and automated check-ins, room service and ticketing;
- increased use of artificial intelligence including; chatbots used to interact with customers;
- sourcing and storing information;
- provision of safety information;
- holistic consumer led experience;
- automated marketing and content through social bots;
- improved number of tourism business implementing social marketing strategies;
- improved organisational consumer data analysis;
- targeted marketing;
- decreased environmental footprint due to; paperless ticketing;
- environmental awareness through artificial tourism information.

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