

**Evaluation of 2007 On-Line
Consumer Satisfaction
Assessment Pilot**

*Summary of Interview Findings
Final Report*

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Summary of Interview Findings Final Report

Prepared for:

Nova Scotia Department of Tourism, Culture & Heritage

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RE: Evaluation of 2007 On-Line Consumer Satisfaction Assessment Pilot for the Department of Tourism, Culture & Heritage

The following report provides our Summary of Interview Findings Final Report – a summary of commentary collected as part of our **Evaluation of 2007 On-Line Consumer Satisfaction Assessment Pilot**.

Since this report is interview based, the results should be considered as a collection of impressions of the successes and challenges experienced during the 2007 Pilot.

Satisfaction among participants we interviewed was high:

- Satisfaction with the information that was provided at the start of the process—8.2/10
- Satisfaction with communications during the period of the pilot—8.9/10
- Usability/functionality of the online tool—7.9/10
- User friendliness of the final report—8.6/10

Satisfaction was also high among the Committee Members, although Pilot organizers were somewhat disappointed with the number of Pilot participants and the number of completed surveys generated within the Pilot.

Sincerely,



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encl. Summary of Interview Findings Final Report

Table of Contents

- Background.....1**
 - Scope & Purpose of the Evaluation..... 1
 - Evaluation Methodology2
 - Context 3
- Evaluation Highlights.....5**
 - Operator Uses of Research Findings 5
 - Continuing in 2008 and Willingness to Pay 5
 - Toward Financial Sustainability..... 5
 - Opportunities to Improve Questionnaires 6
 - Improving Functionality and Reporting Capability 6
 - Improving Operator Participation and Engagement..... 6
 - Articulating a Value Proposition for Operators 6
 - Testimonials from Participants..... 7
 - Obstacles to Participation 7
 - Use of Customer Feedback and Tools..... 8
 - Operator Follow-up 8
 - Reasons for Non-Participation 9
- Overall Satisfaction 10**
 - Participant’s Satisfaction..... 11
 - Pilot Conclusions & Recommendations..... 12

Background

The recent 2007 On-Line Consumer Satisfaction Assessment Pilot (hereafter referred to as the Pilot) was designed to support the tourism industry in measuring visitor satisfaction and provide accommodation operators with an objective customer feedback relative to industry benchmarks. The overarching purpose of this Pilot was to enable operators to make operational changes toward improved customer satisfaction based on objective client feedback.

The 2007 Pilot On-Line Satisfaction Assessment is an initiative of the Tourism Vision Team). The Pilot was considered an important step toward the development of standards of quality and service for tourism that will exceed visitor expectations and fulfillment of a recommendation being pursued by the Quality Vision Team, under the direction of TIANS.

Rolled out in early 2007 in partnership with the Nova Scotia Department of Tourism, Culture and Heritage; Tourism Industry Association of Nova Scotia (TIANS); and the Quality Vision Team (QVT) – the 2007 Pilot Steering Committee, the Pilot ran from July to October 2007.

The Pilot was applied to fixed roof accommodation and campground sectors and equipped them with a survey tool to measure customer satisfaction. The survey tool was built and maintained by CRA and used by forty-two accommodation providers who were recruited to participate (pilot capacity had been provided for up to 60 operators). As part of their participation, operators distributed and collected registration cards from their guests, and guests were sent weekly email invitations along with a unique URL to the online questionnaire.

The online system designed by Corporate Research Associates (CRA) provided operators with real time reporting capability, along with monthly printed summary reports. Of the 42 properties that remained in the program, survey completions totalled about 1,200, with individual returns from each participating property ranging from 0 to over 80 during the period July to mid-October (2007).

Scope & Purpose of the Evaluation



The scope of the evaluation of the 2007 Pilot included the following:

- Interview members of the steering committee
- Interview pilot project contractor
- Interview selected highly committed pilot participants
- Interview selected pilot participants that demonstrated low commitment
- Interview operators that declined an opportunity to participate
- Incorporate relevant findings from CRA report on pilot project findings
- Review relevant administrative records

Interview guides were developed for three broad categories of stakeholders:

- Steering Committee Members
- Participants
- Non-participants (those who were invited to the Pilot but who declined to participate or withdrew their participation)

The purpose of the evaluation was to identify:

- What operators expect from the information
- How they planned to use the information (or had used it)
- Willingness to continue with the service
- Willingness to pay for the service (or elements of the services)
- Opportunities to improve the Pilot
- Operator views of the process (was it workable) and the usefulness of the data and reports
- Barriers to operator participation
- Key messages that could be broadly communicated and used to increase understanding among participation

Evaluation Methodology

The methodology for this assignment was primary research based and consisted of telephone and in-person interviews with committee members and operators of both fixed roof and campground accommodations.

Interview themes examined:

- **Expectations of the Pilot** – why operators choose to become involved and



what they hoped to gain from the pilot

- **Communications and Process** - expected levels of effort to be involved and the adequacy and suitability of information that was made available
- **Barriers/Challenges** – that may have inhibited participation and/or continuation, and how these had been overcome or addressed
- **Relevance of Data** – relevance of the data to the operator’s services and any thoughts on information they may have liked to have had
- **Continuation & Willingness to Pay** – their willingness to pay for access to this system and strategies/suggestions for funding
- **Changes to Our Culture of Quality** – evidence of change that resulted from information gained through the pilot and lessons learned through the pilot and relative to monitoring systems operators may already use
- **Overall Satisfaction** – with the pilot, its how satisfied they were with the information that was provided at the start of the process

Interview participants were also asked about General Comments they wished to make about the pilot (e.g., to help improve the program in the future).

Given the methodology (a total of 25 key informant interviews), this report should be viewed as a collection of impressions of the successes and challenges experienced during the 2007 Pilot.

Context

One of the longer term objectives of the Pilot was to change the culture of quality within Nova Scotia’s accommodations sector. Although we searched for evidence of meaningful changes in this regard, it is too early to offer commentary on the extent to which the Pilot supports this longer term goal.

To help place the evaluation discussion in context, we offer the following definition:

Pilot - “a prototype of a series being considered for adoption” and **Prototype** - “a primary use for prototyping is the acquisition of information that affects early product development.” Interview comments from some of the Committee Members reinforced this perspective.

A total of 25 interviews have been completed:



- One interview with the contractor (CRA)
- Six Steering Committee interviews
- 12 Participating Operator Interviews (8 'higher committed' participants, 4 'less highly committed' participants)
- 7 Operators who chose not to participate or withdrew



Evaluation Highlights

Our evaluation is based on a series of telephone interviews with selected Pilot participants, non-participants (invited to the Pilot but chose not to participate) and Steering Committee Members. Research objectives, and highlights from the corresponding findings, are presented below.

Operator Uses of Research Findings

Operators chose to participate in the 2007 Pilot because they saw this as an opportunity to monitor their own quality through an objective system that would provide credible evidence on their achievement of quality. The information that would be collected could support a variety of management decisions toward improving services in a way that for some is not possible through direct operator to guest communications.

Continuing in 2008 and Willingness to Pay

Operators said that their continued participation ‘depends’ on the cost of the program (if any). In our assessment, we find participation will also depend on the level of commitment of individual operators to the evaluation process and their willingness to receive criticism and the overall value of the service – the Pilot would have higher value if it could be used to support an individual operator’s level of quality to the market place (as in some recognizable certification of quality achievement). Likelihood to continue with this Pilot as a full program, received a mixed rating based on whether or not the process was free. Contrasting this, the overall satisfaction levels were high.

Toward Financial Sustainability

The Steering Committee feels that there should be some fee for service. Some operators think this way too, but there is perhaps a stronger view that government should maintain this program if it seeks to change quality.



Opportunities to Improve Questionnaires

There is general agreement among operators, but particularly among B&B and campground operators, that questions could be made more relevant to each sub-sector. Steering Committee members also agree that the questions could be strengthened. It would be beneficial to have some feature whereby questions could be customized to specific operations.

Improving Functionality and Reporting Capability

The system would benefit from a more detailed information/communications kit and training workshop on how the system should be implemented, how to approach guests to participate in the survey, and how the online tool should be used to maximize the operator's value. It is clear from some of the comments that the 'check-in script' and introduction of guests to the option to offer their feedback was not always as was intended. This has implications for the integrity of the overall system as 'in-the-field' adaptations may change how guests are invited to participate and who eventually responds to the survey. The system was thoughtfully designed to reduce selection bias – but the delivery needs to be followed more closely and the operators would benefit from some information on delivery.

Improving Operator Participation and Engagement

The strongest tool for conveying the value of the system is the opinions of those who are in the system and the professionalism of the system itself. More succinctly, the final report and the online system are well done, show well and could be showcased to sector participants who are 'on the fence' or who had initially chosen not to participate. If formalized as a program (rather than a Pilot), the value of the evaluation tool and the evaluation results would increase, particularly with the potential to market/publicise the industry's efforts toward quality assurance and quality improvement (e.g. a ratings system).

Articulating a Value Proposition for Operators

Related to the point above, operators might benefit from a clearer understanding of how much this system would cost them individually (to develop and maintain) relative to what they may pay within subsequent incarnations of the 2007 Pilot. This could part of the broader communications and included as part of an overall awareness and education effort.



Testimonials from Participants

Participants said:

- “Great potential with the program.”
- “Well worth the effort..... If you have a license, you should be forced to participate and it should be monitored by the Dept.”
- “It was a positive thing and I would encourage other campground owners to do the same thing.”
- “It’s a good thing and worth doing if we’re serious about being world class and sophisticated and in rural NS in particular we need to have the facilities and experiences to attract them.”
- “Do IT!!!!”
- “Great tool to garner information from and learn from on a continuous basis. And GREAT incentive with the lobster.”
- “Definitely worthwhile. Worth the extra effort, paperwork etc. and if you tune in you can react right away.”

Another comment reflected the need for broader participation to limit response bias.

Obstacles to Participation

Some guests expressed concerns with SPAM and privacy issues. Not all guests had home/work access to computers/the internet and some guests said simply that they “do not do surveys.” However, most operators heard nothing from guests that would indicate a barrier to their participation in the survey process.

Some challenges we noted on the part of the operators included:

- Some operators did not like the way the questions were worded (e.g., we were told many questions were not relevant to experiences at a B&B);
- Some operators did not have access to high speed internet (and believed this was important for their participation);
- Some operators felt the process was time consuming and cumbersome to explain the role of the card/program to guests;
- Management may not have effectively communicated to their frontline staff their wish to participate more fully in this Pilot. Staff needed to incorporate



this Pilot into their day-to-day interactions with guests and make it part of their booking script.

- There is a mindset among some operators where they take the position that they know their customers already, therefore the value of this system is not as high for these operators.

Perhaps the most significant barrier to participation was the timing and, related to this, the depth of the communications. As one operator put it, “There wasn’t enough information up front either promotionally or just basic information-wise.” Committee comments echoed concerns over the limited time to deploy the Pilot and its perceived negative impact on participation.

Use of Customer Feedback and Tools

Operators seemed to recognize how beneficial the feedback was to allow them to improve their own accommodations, and most see this tool as a means to improve Nova Scotian accommodations as a whole. There appears to be encouragement from respondents for everyone to get on board with this system.

Operator Follow-up

Operators liked the fact that they could act on the feedback that was provided, but they disliked not being able to follow-up with the individuals who made the comment. Changes/actions based on direct feedback may benefit the next guest, but there is no opportunity to improve the relationship with the guest making the comments. Operators indicated it maybe useful to have the evaluation technology allow an operator to post their response or action taken so the person making the comments received some e-mail notification of what was done to address their concerns. This is a suggestion of the operators and although this may be useful to the operator, it may have privacy implications and may be difficult without removing any guarantee of anonymity – not being able to make this guarantee would likely have a negative impact on the response rates.



Reasons for Non-Participation

Those who did not participate in the Pilot cited a number of reasons which we would characterize as follows:

- May not have understood or had a clear idea of what the program was about and what it would involve
- Did not remember being invited or why they said no
- Were, at the time, “probably more interested in surviving”
- “It did not interest us.”
- Belief that their poor internet connection would limit their ability to participate
- It was poor timing
- It was flawed because “not everyone has e-mails and we do an older crowd/ people are getting more private about their e-mail; [I] think you are more likely to get the extremes – not the middle people”
- Prefer/like “low tech comments in comment cards”
- Perceived the work of transcribing names and e-mails as too much staff time

At a high level, fault could be with the communications – it is more likely that those who did not participate did not understand what was being asked – all indicated they value client feedback, but these operators did not seem to have been engaged sufficiently at the start to make a deeper assessment of why they should be in or out of the Pilot.



Overall Satisfaction

Did the pilot meet your expectations?

From a participation perspective, committee members were disappointed and, while all would have liked to have higher participation (both in the number of participants and the depth of participation) the short lead time and the depth of communications negatively impacted program reach.¹

On balance, however, the 2007 Pilot seems to be achieving its stated goal “to promote a quality culture within the tourism industry.” Committee comments reflect overall satisfaction with the pilot and optimism for the future. Statements include:

- As a pilot, the system seemed to work well, but a late start “crippled the effort and limited recruitment and limited participation.”
- Delivery of participant instruction was [effectively] dropped and/or miss-communicated.
- The level of instruction pre-supposed support and enthusiasm... some agreed but did not follow through in good faith.
- The deployment needed a better and more advanced marketing approach since paranoia prevailed and it feared that this pilot would lead to a rating system (like Canada Select).
- The industry has been talking about a satisfaction system... this system could fill this role and it would be good if we could give operators a check in rating system...
- It was great to see this idea “actioned” – it was successful as a pilot – I was disappointed in the timelines with a slow start and compressed – had we been able to prepared and tailor this to the tourist season, that would be better – more communications would have equalled more buy-in
- I was pleased that there was a general level of satisfaction from the operators and that the committee is discussing a round two – the goal that momentum would build for this was my personal objective

¹ One might speculate that the lower than hoped for response rate is a signal of a possible problem with acceptance of the Pilot among operators. We do not believe this is the case (given that the commentary from non-participants and participants alike) and believe that the timing of the deployment and the effort made at recruitment and follow-up worked to reduce participation.



- During the next round of survey development we will touch on broader levels of satisfaction – and if we were able to say nationally that “we asked, you said and we did” we would have something on which we could build a brand, an awareness, or unique proposition in the market place.... “satisfaction is more significant than price”

Committee members felt, through the pilot, progress was made on achievement of a number of “culture of quality” goals among the participating accommodations providers. The pilot created awareness and presented quality as being important to operators, but committee members point out that “we are in development” and that “this year was more about process - it is the buy-in that needs to occur.” In short, the pilot is a step forward and was always understood as a stepping block. Still, although we did not find examples of changes in the quality of culture in a broad sense, several operators spoke of minor changes that were motivated by survey commentary and feedback (e.g. one operator changed the content of their website to adjust form some communications issues associated with the earlier web content).

Given there did not appear to be an initial opportunity to consult with industry to see if this pilot was wanted/ needed or would be valued, the success that was achieved is noteworthy.

Participant’s Satisfaction

A number of satisfaction related questions were also asked of operators using a scale of 1 to 10 (with 10=Most Satisfied) as follows:

- **Satisfaction with the information** that was provided at the start of the process - 8.2/10
- **Satisfaction with communications** during the period of the pilot - 8.9/10
- **Usability/functionality** of the online tool - 7.9/10
- “**User friendliness**” of the final report - 8.6/10
- **Likelihood the operator will continue** in 2008 – a mixed rating and commentary reflected that this would be dependent on whether or not the process was free.



Others said that:

- The system was “time consuming” and “some of the questions could have been worded better and more relevant to the specific operator.”
- Yes – we liked the real-time reporting capability, a feature that was not expected in the initial budget for the project, but if operators were not engaged, this might help sell the assessment tool.
- I was satisfied from an operations perspective it – I was disappointed in that there are questions and issues that would have been more relevant to my operation – also, we have a quality program in place and I am not yet comfortable that this new one replaces my current system.

In short, there was a general level of satisfaction among the participants we spoke with, but not a great deal of interest in paying for the system. The application of the results of the quality assessment information in consumer information may increase the value of the tool and therefore motivate willingness to pay.

Pilot Conclusions & Recommendations

Survey Participants and Committee Members offered a variety of suggestions for improving the Pilot. Many of these reflect feedback provided by participants throughout the process. From our research to date, we identified the following emerging recommendations/themes:

- Methodological pros and cons of various in-house quality monitoring systems (from ad hoc to elaborate) need to be identified in relation to the system offered by the Pilot – this should be part of the communications and will support a better understanding of the value of the Pilot tool and address some of the issues we identified (concern with turn around time, ability to correlate survey data with other activity within the accommodations, overlap with in-house systems, value of the objectivity, etc).



- Timeframe for the Pilot was short and, as a result, there is limited potential for this interim evaluation to show progress toward what would be ultimate results (positive changes in the culture of quality). Related to this, “more lead time [is] needed to have all process steps in place earlier.”
- Operators (who agree) should be able to access and share comments made by guests about each others accommodations (other than their own) so that this can support broader learnings about customer needs and values. This suggestion from an interview participant would require a release from the operators who agree because of the confidentiality commitments made to operators by the contractor (CRA) and the Pilot administrators.
- Commentary reflected that the online navigation instructions for the operators could be improved, along with the navigability of the online environment may have been difficult for some to learn and more online support might have improved this. In the future a more visual manual with more intuitive instruction might support better use of the online tools – the one page e-mail instruction that was provided may not have been sufficient
- It seems to be broadly recognized and acknowledged, there are opportunities for improvements in the areas of project management and communications and, if the pilot were to be continued, there are many lessons for better coordination of communications activities. However, Partners would need to determine who should have the voice for this program and then have this messaging integrated through broader communications.
- Communications should also be expanded to methods broader than electronic forms and (as noted elsewhere) may also include site visits, particularly at the point of initial engagement.

There should be:

- A person to call
- Better communications of the value of this survey methodology over others and in concert with others
- Messaging around the important role of frontline staff



- Work on how this can and should be expanded – strategically, so that it encompasses more of the industry
 - More follow-up – and it may need to be less e-mail based and more personal
-
- The Pilot (if shifting to a program) needs to be branded and reside with a clearly identifiable and responsible entity. Positioning or branding of the Pilot and the relationship and roles of the stakeholders needs to be clearer to the operators. A case can be made for identifying the program participants and publicising the operators as program participants. The Pilot is not something that is going to be immediately adopted by operators who are content with their operations and/or hold the perspective that they already know what their customers feel about their services. Shifting to a program and using the results to communicate to NS tourists this industry’s active interest in improving visitor experiences will elevate the value of the tool for those who are not currently participating or who are marginally attached to the program. General promotion that the industry has this program in place would not be sufficient. It would need to be promoted in a way that provides visitors the opportunity to incorporate information about quality within their own trip planning decisions. This is a suggestion that operator ratings would be available (from operators who agree to this) for use in travel planning. We believe individual operators should decide on their own how they wish advertise their own ratings.
 - Operators themselves need to make the effort to understand the opportunity, decide if it is right for their operations, and if so, work to communicate this to those within their organizations. The real time capabilities will support the operator in tracking their staff’s application of the tool.
 - There needs to be some improved/additional messaging around data use and confidentiality - some operators wondered who was getting the information and this may have adversely impacted participation.

- The Committee may consider providing a global wrap-up report that is made publicly available - some non-participants had indicated that they wanted to see this program run longer before they signed up – a wrap-up report might help address outstanding questions about the program. It would also convey more concrete information about the quality of the satisfaction tool.
- A workshop or training session would have been the better way to inform operators - next time this should be started much earlier and be accompanied by a rollout that includes necessary training courses – either through workshop sessions or through online training. Training is necessary for not only the owners, but also the frontline staff who will be implementing the tools on behalf of the owners and as part of their jobs.
- The Pilot needs to have its own identity and its own place, along with the necessary support for those operators who are implementing this within their establishments. They need to be able to contact someone and get support as necessary, throughout the season of the program (if it is not to be implemented on a full year basis). This could be in the form of a personalized help desk. Depending on resources available, this office may also conduct field visits to support owner engagement.
- Sufficient resources need to be made available to deal with communications and outreach roles, particularly if they are expanded (e.g., with information sessions). The 2007 Pilot required an estimated 3 or more days per week during the program. It is likely that this level of effort would be required in subsequent efforts and potentially more effort depending on the nature of the recruitment effort (e.g., site visits and workshop will add time demands).²

² The administrative duties in 2007 included managing, organizing, planning, scheduling, and following up with results from meetings of the Steering Committee; internal communications, communication with property participants, liaison with the research firm (CRA); drafting correspondence; maintaining the property data base; planning for presentations; reviewing reports, procurement, surveys, Pilot correspondence; Letter of Understanding and coordinating for delivery of weekly prize draw of fresh lobster, among other duties.



- To help defray the cost of the program, participants should be expected to pay some fee for service. There are a number of options to move the program towards self sufficiency, from user pay based on levels of service they obtain, to fees based on business size/revenue and/or a sliding scale based on depth of reporting or customized reporting services. The problem for administrators is that the costs for the delivery of the program/Pilot would vary little on the basis of, for example, visitor counts or room nights. With some qualification, there would be about as much infrastructure costs, reporting activity and effort to address 10 responses as there is to address 100 or more responses. Even with user pay system, there is still a role for government. As one person noted, improved visitor quality and experiences benefits the entire economy.
- The ‘one size’ fits all approach to the survey tool and analytical capabilities may need to be expanded so that questions are more relevant to particular operators. Some commented that, as the questions currently exist, they are “not specific enough” to all categories of accommodations operators. A feature that enables some operator specific questions would be welcomed by certain operators – but this would need to be done carefully so additional questions are relevant, professionally worded and do not adversely impact the integrity of the system.
- From the participants’ side: A better information package and improved/easier instruction on how to access the data – “We did not have a strong operator information kit.” This needs to encompass all details, from the language used to ask/ invite visitors into participation, to the transmittal of the e-mail and names spreadsheet, to the use of the data – “We missed the mark on the front end packaging of the information.” There was a lack of a general awareness of what was going on – “We sent out an e-mail but there was no corresponding push with collaborative information” – so non-participants may not have understood the program or even heard about it. Non-participant commentary echoed this lack of understanding. Another significant issue is that the Committee only responded when gaps were revealed – it would be better to have more regular communications to keep attachment.



This tool will not be for everyone. Operators whose business model is not focused on tourism may not see the advantages of this tool in their day-to-day operations. Some feel they know their clients well enough and others may lack the resources to be able to do much about comments they may receive (e.g. marginal operators may be hard pressed to update décor that receives unfavourable review). As a consequence, they may not want to hear the review in the first place.

In the extreme, it may well be that participation in a broad form of quality satisfaction monitoring may be inhibited by operators who do not value quality related opinions of their customers – we heard from one such case. There may be others who are in the “do not want to hear what customers have to say” category because they maybe fearful about the result and limited in how they can respond. Consider, for example, marginal operators who may not have the resources (finances) to afford the updates, replacements or renovations that emerge as necessary from the customer feedback.

Over time and assuming greater participation, the owners of this data may be able to explore the data to identify trends such as where ‘infrastructure’ is below target quality levels, for example, for certain types/groups of accommodations. If so, there may be policy implications/opportunities that emerge so that the program data supports not only individual operator decisions but also provides objective industry-wide data that might benefit overall industry policy direction and goal setting.

In future deployment of the satisfaction tool it may be worth while asking participate to track the reasons visitors decline to participate (using categorical responses) which would inform the analysis with respect to the size and characteristics of the missed visitor group. It may also be purposeful to have one or two questions for feedback on the survey itself for participants. They could be asked, for example, did you have any problems completing this survey? This might help in ensuring that the survey is user friendly and/or has clear language.

