



Nova Scotia Tourism

Nova Scotia Tourism
Research Symposium
March 2007

Nova Scotia Tourism Research Symposium

Final Report

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Introduction

The purpose of this report is to provide a high level review of the key conclusions from the one-day symposium held on Thursday, March 8th. The symposium was very well attended by a broad cross-section of stakeholders from the tourism industry in Nova Scotia, along with representatives from the Department of Tourism, Culture and Heritage and members of the Tourism Vision team. A total of forty individual participated in the symposium.

The day began with two presentations providing context for the day's discussions. The first was led by Neil McInnis from the Canadian Tourism Commission (CTC) who provided an overview of the research currently being conducted in Canada's key markets, as well as a very informative look at the changing tourism market on a worldwide basis. This was followed by a presentation from Stephen Coyle of the Department of Tourism, Culture and Heritage who provided an overview on the research activities of the department. The presentation also outlined the department's research accomplishments during the past year as well as the challenges faced by his team in fulfilling its mandate. It was apparent from both presentations that there is a lot of research data that is already available from both organizations that may not be as known or understood as it could be. This was really the first indication of the day that there was some requirement for the role of a **knowledge integrator** in terms of available research information.

Throughout the day, there was a high level of engagement by participants both in plenary and breakout sessions, indicating a strong interest in the topic and a willingness to provide constructive feedback. At the same time, it would be fair to state that there was some healthy skepticism about the outcomes of the process. It is clear that the department must demonstrate that it has listened to the feedback and has taken immediate action where appropriate on the suggestions received during the symposium.



Overview

There is no question that participants appreciated the opportunity to offer the department their advice with regard to the industry's research needs and expectations. There is a significant opportunity for the department to play a more important role in providing the industry with the research insights needed to make more informed and better decisions. Streamlining the information available, increasing data mining activities with existing research information, providing user friendly access to the information, adding value to the data through insights and focusing more on predictive and prospecting research will go a long way to better serving the needs of the industry. It should be noted there was a certain degree of skepticism that clearly questioned whether or not the department would respond appropriately to the suggestions of industry stakeholders. Timely action by the department to address short-term opportunities in order to better serve the needs and expectations of the industry is critical to overcoming any skepticism that might exist.

Finally, it will be important to appropriately follow up with participants in a meaningful and timely fashion to maximize the benefits of the symposium. There may also be an opportunity to hold an annual symposium focused entirely on the insights from the previous year's research efforts for the tourism industry, both that generated by the department itself and from other third-party services such as CTC and the Atlantic Canada Tourism Partnership (ACTP).



Key Recommendations

There were a number of recurring themes in the suggestions being made by participants that are summarized as follows:

1. Better Use of Existing Data

It is apparent from an industry perspective that there was a strong sense that existing data could be put to better use. For example, there was considerable interest in assessing the Visitor Exit Survey data by mode of transportation and better understanding visitor traffic patterns within the province. Other examples included examining the occupancy numbers by type of accommodation or occupancy in Halifax versus that in rural Nova Scotia. Accessing data from other sources, such as CTC's Short-Term Market Outlook or Canadian/US Travel Intentions Study was also seen as an opportunity to make better use existing information. There was also interest in place of origin data for air visitors and websites statistics including those of the Province and Destination Halifax.

2. Enhanced Data Collection

There were several suggestions that current research could be enhanced by collecting different types of information than was currently the case. For instance, segmenting the Meetings, Convention and Incentive Travel market from other visitors or collecting point of origin information through accommodations would improve the usefulness of the data for industry. There was also considerable interest in learning more about in-province travel by Nova Scotians. This could be accomplished by better utilization and communication of the new Travel Survey of Residents of Canada.

There were some concerns expressed over the consistency of measurement metrics being used by different parties and the continuing issue of the credibility associated with the provincial tourism numbers. On the latter issue, most felt that there was a need for better education on how these numbers were compiled, and for clarifying the role of operators in providing the data for this purpose.

3. Increase Forward Looking Research

There was a strong consensus among the industry stakeholders that more emphasis was required on predictive and prospecting types of research than is currently the case. There was a strong interest expressed in forecasting the prospects for tourism over the both the short-term and long-term. In particular, reference was made to the use of advance booking's information (i.e. tour operator bookings, RV rentals, car rentals, accommodation bookings etc.).



Many felt that the current budget allocation of roughly 85% devoted to industry measurement, accountability and evaluation and 15% to predictive and prospecting types of research needed to be better balanced, with some believing that the priorities should be actually be the reverse. Specific examples of forward looking research included emerging markets, new market segments and labour market forecasts.

4. Insights Not Data

It is clear that industry expects the department to take a position on what the data actually means in terms of providing direction. More interpretation of the data is needed, including data from other sources looking at societal trends or global travel trends. Related to the need for insights is the interest in benchmarking against best in class destinations and market share analyses against competitors.

There is an expectation that the department take a point of view on the data being collected, including that being collected by other parties. This would extend to commentary related to occupancy numbers released by the department to explain any significant events that may have impacted occupancy in the province.

A focus on insight would have the added advantage of simplifying the information being reported to the industry. The industry is not interested in detailed research reports, but rather concise, to the point, synopses of those reports in straight-forward language, along with a summary of the key conclusions of the findings.

5. The Need for Knowledge Integration

There are many organizations involved in tourism research. There is an opportunity and a need to integrate the knowledge being gathered across various sources of data. There is potential and potent role for the department to play by becoming the knowledge center for tourism research in Nova Scotia.

This opportunity would also serve to identify and reduce any duplication of research efforts, as well as clarify the roles of the various parties involved in such research (ie CTC, ACTP, Vision Team, the Department of Tourism, Culture and Heritage, etc.). This would require a significant effort by the department to gather, interpret and report on all the relevant research. At the same time, it would provide a single source of relevant research data for the industry in Nova Scotia.

6. More Emphasis on Motivational Research

There was considerable interest in better understanding the motivations of visitors in their choice of a vacation destination like Nova Scotia, including the key differentiators that the province has to offer. More experiential based research, such as the Explorer Quotient work



being undertaken by CTC, the use of more sophisticated segmentation models and a better understanding of social values were all examples of the perceived need for a deeper understanding of visitors' motives for choosing vacation destinations.

7. Improve Access to Information

Not unexpectedly, better accessibility of the information was a key recommendation from the industry stakeholders. It is clear that accessibility to the research needs to be simplified, both in terms of content and usability. There is some need for those in the industry to be able to customize information perhaps through some sort of easy to use enquiry tool using a portal to access the research database.

Suggestions of brief summaries rather than detailed research reports that could be posted on a website, *Outlook Bulletin* that focused on quarterly forecasts, rather than rear view statistics and regular industry briefings sessions were mentioned as a means of making the information both more user friendly and useful to the industry.

There is also an opportunity to provide more tools to the industry to assist their efforts to acquire information that is more relevant to specific businesses. In addition to the Customer Satisfaction Tool kit being developed by the Quality Vision Team for instance, there is a tool required to search for existing research information, as well as a tool to evaluate the impact of Festivals and Events for organizers. There was also interest in the ability to undertake performance based marketing research. There were several suggestions related to the distribution of research to the industry, including the use of Destination Marketing Organizations and Regional Tourism Associations as channels of communication.

8. Increase Outreach Activities

There is a clear need to better educate or improve the level of awareness among stakeholders of the information currently available from the department. This will likely require more proactive initiatives by the department to actively promote its information resources. This could be accomplished a number of ways.

For example, more outreach activities such as a quarterly *Outlook Bulletin* or an annual research symposium on the latest tourism insights would clearly improve awareness of the department's work, as well as profile its role as a knowledge integrator. Higher profile of research at the Tourism Industry Association of Nova Scotia's (TIANS) annual conference is yet another outreach opportunity.

