

Provincial Tourism Research Program

Nova Scotia Department of Tourism, Culture and
Heritage

March 8, 2007

Overview

- Research Strategy
- Research Services for Industry Partners
- **2006/07 Research Workplan Progress**

What I won't be Discussing

- Research methodologies
- Research Findings

Research Strategy

Our Vision

- “Continue to advance Nova Scotia’s national leadership position in the accurate, timely and relevant measurement of tourism activity. Provide the best intelligence possible to inform and support industry and government efforts to dramatically grow the province’s tourism industry”

Research Strategy

Role for Research

- Identify new opportunities for operators
- Reduce decision making risk for all partners
- How are we doing?
- Support the Vision

Research Strategy

Scope of our Program

- Staff of 5 + 1 + 12
- Manager
- Senior Research Analyst Karen McNutt
- Research Analyst Terri-Lyn Bennett
- Survey Administrator Jim Falconer
- Administrative Assistant Barb Sheppard
- Research Analyst Vacant
- Dozen Field Staff

- Core Budget \$700,000

Research Strategy

General Overview of Types of Research

- Industry Measurement \$200,000
- Accountability and Evaluation \$200,000
- Predictive \$25,000
- Prospecting \$75,000

Research Strategy

Industry Measurement

Enables the Department to report timely and relevant measures of tourism activity. Monitor industry activity and performance through an array of ongoing indicators.

Research Strategy

Accountability and Evaluation

Monitors major activities and programs to determine effectiveness, economic impact, satisfaction and opportunities for improvement. {Program evaluation tells us how our activities are working . Most importantly this research identifies opportunities to make our programs even more effective.)

Research Strategy

Predictive

Forecasting demand, activity or industry capacity.

Research Strategy

Prospecting

Supports the development of competitive market strategies and tactics by providing consumer and marketplace insights. Identifies where the greatest potential lies and how we can convince those consumers to visit Nova Scotia.

Supports the development of competitive products, matching the right products to the right markets and identification of product development opportunities. By understanding the evolving needs of our visitors we can keep Nova Scotia one step ahead of the competition.

Research Strategy

Strengths

- 4 Full time Staff, 50 years of research experience
- Technical competencies
- Commitment to technical excellence
- Proven platform for measuring tourism activity
- Nimble methodologies
- Technically sound transparent
- Consolidated research effort

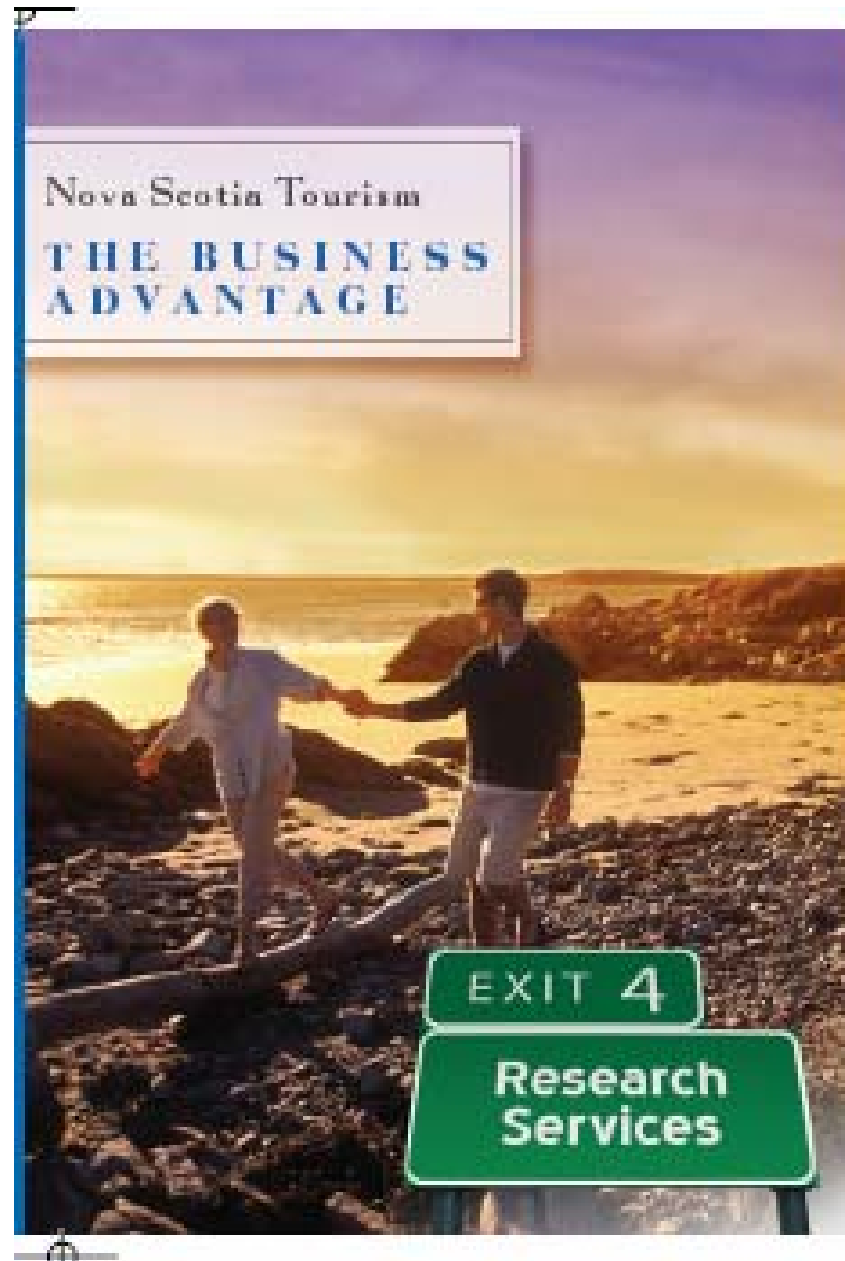
Research Strategy

..... and Challenges

- Information transfer to partners
- Ration resources (HR and \$)
- Serving diverse clients
- Multi-year research strategy required

Services to Industry Partners

- 50 telephone and email requests
- Heavy users
- Roughly 2-5,000 website visitors per month
- Average 5-6 minutes on our site
- Brochure to further promote our services



Selected Services

Profile of Specific Traveller Type

- Visitor Exit Survey
- Travel Attitudes and Motivations Survey (TAMS)
- Emerging Markets Study

What is the outlook for tourism?

- Economic based forecasting
- Ongoing travel intention monitoring
- Enquiries, reservations, web metrics,
- Air capacity

Selected Services

Who is showing an interest in visiting

- Advertising Evaluation
- Advertising Awareness
- Enquiry tracking

Importance of Tourism

- Tourism Economic Impact Model
- Tourism Industry Facts
- Nova Scotia Tourism Quick Facts

Selected Services

How important is Tourism to my community?

- Detailed reports on accommodation activity
- Community traffic flow
- VES specific attractions and communities
- Tourism impacts at regional and sub-regional level
- Activity indicators s.a. specific VIC's, provincial museums

I am considering opening an accommodation.

- Powerful accommodation data base.
- Combined with other research resources.

Other Services

- Who visits Nova Scotia?
- How does my business compare to others in the area?
- How do I measure the impact of my festival?
- How will business be different in the future?

2006/07 Workplan Progress

Some of our Accomplishments

- Continue to offer best possible industry measurement –air
- Greater coordination and organization of Ad Evaluation
- Industry outreach
- Greater focus on key insights when reporting
- More proactive in identifying business opportunities
- Convincingly demonstrate investment potential
- More proactive with media

2006/07 Workplan Progress

Still needs work

- Improve accommodation reporting
- Knowledge transfer to partners
- Economic Impact Model Update moved to 07/08

Now we'd like to hear from you.

Thank-you for contributing your time and ideas.