

### Research: Insights to Investment

Nova Scotia has a comprehensive system for collecting and reporting tourism statistics. The Province of Nova Scotia began collecting statistics on tourism activity in 1922. Over the years, research methods have progressed and improved. Much of the success of the Department's research program is a result of the cooperation and participation of industry partners. Today, Nova Scotia's system serves as a model for other Canadian jurisdictions in terms of industry cooperation, coverage and reporting capability.



For further information, visit our tourism research website at: [www.gov.ns.ca/dtc/pubs/insights](http://www.gov.ns.ca/dtc/pubs/insights) or contact Karen McNutt at (902) 424-6355 or [mcnuttk@gov.ns.ca](mailto:mcnuttk@gov.ns.ca)



## Nova Scotia Tourism THE BUSINESS ADVANTAGE



Nova Scotia's tourism industry provides a range of appealing opportunities for new investment. The Department of Tourism, Culture and Heritage invests heavily in research to help reduce the risk in tourism investment decisions. One of the roles of the Research Section is to provide insights that will help increase the competitive advantage of Nova Scotia's tourism industry. We have a wide range of resources to help you determine which opportunities are best for you.

The Research Section has much of the information you require to plan and strengthen your tourism business or organization. We can help provide answers to the following questions:



### What if I am interested in a specific type of traveller?

The Department's *Visitor Exit Survey* provides in-depth profiles of travellers by mode of travel, geographic market and trip purpose. In addition, customized profiles are available for visitors who participated in specific activities, used a particular type of accommodation or shared something else in common.

We are a funding partner on the *Travel Activities and Motivations Survey*. This study reports on the size, characteristics, and behaviour of specific niche travel markets in North America. A variety of reports, ranging from culture and entertainment enthusiasts, golfers and casino-goers, to six types of touring travellers, are available.

The Department is currently examining emerging market and product opportunities to grow tourism. An overall report will be produced with mini-reports for the most promising opportunities.

### Who is showing an interest in visiting Nova Scotia?

*The Nova Scotia Advertising Evaluation Study* produces detailed information on prospective visitors who enquired about Nova Scotia. Enquirers who made the trip to Nova Scotia are profiled, as are prospects who decided not to visit.

*The Nova Scotia Advertising Awareness Study* reports on what residents of key markets think about Nova Scotia.

### How important is tourism to the province?

*The Tourism Industry Facts* brochure and the *Nova Scotia Tourism Quick Facts* outline the importance of the tourism industry to Nova Scotia. These publications highlight tourism industry revenues, expenditure breakdowns, accommodation statistics and other key facts. More detailed information on the importance of tourism is available through the Department's website.

### How important is tourism to my community?

Due in large part to the support of industry partners, the Department is able to compile many statistics to help you understand tourism in your local area.

In addition to reporting monthly room-nights sold by tourism region, the Department can produce customized occupancy reports for tourism associations, counties and most communities.

Detailed route and community information was captured in the *2004 Visitor Exit Survey*. As a result, non-resident visitation measures are available for some 80 communities throughout the province. This survey also asks about awareness of specific destinations and their importance to visitors.

Tourism industry economic impacts such as spending and tax revenues are available by tourism region, tourism association and county.

Other measures that are available to help gauge tourism activity in a specific area include attendance at selected museums, galleries and attractions and number of visitors counselled at the nine provincial Visitor Information Centres and approximately 70 local Visitor Information Centres. If your area of interest is near a provincial entry point, visitor entry statistics may be useful.

Research staff are available to discuss research requirements with communities, as well as present research findings in person.

### I am thinking about opening an accommodation. How much business can I expect?

Thanks to the cooperation of the roughly 1,100 fixed-roof accommodation operators in Nova Scotia, the Department has a wealth of accommodation supply-and-demand data. Prospective investors can request a customized occupancy report for specific businesses. Investors can request analyses based on geography, property type or star rating. The properties can even be hand-picked. The confidentiality of participating properties will be protected by ensuring that at least six properties are included and no single property can account for more than 30 percent of the group's inventory.

Similarly, more than 150 campground operators in Nova Scotia provide the Department with a wealth of supply and demand data. Occupancy reports, like those for the fixed-roof sector, can also be produced for the campgrounds in the province.

### How does my business compare to others in my tourism region? ... in the province?

The Department produces detailed and timely reports on travel activity each month. Measures of monthly visitor entries, room nights sold, site-nights sold, attraction attendance and many other indicators will help you gauge where you stand.

### How do I measure the impact of my festival?

*Guidelines for Measuring the Tourism Economic Impact of Festivals and Events* was developed to help festival organizers gather the information needed to estimate the tourism-related economic impacts. This tool was developed with the support of the Nova Scotia Department of Tourism, Culture and Heritage to enable organizers to produce more credible and consistent estimates of their tourism economic impact.

### What is the outlook for tourism?

The Department subscribes to the Canadian Tourism Research Institute (CTRI). One of the services they provide is a three-year forecast for tourism in Nova Scotia. This work is based primarily on economic factors and generates forecasts for visitation and revenues. The most influential factors for tourism are also discussed.

The Department tracks travel intentions for the current year through its online survey of website visitors and via the annual *Advertising Awareness Tracking Study*.

Monthly updates of Check In enquiries, Check In reservations and novascotia.com visits and downloads are indications of interest by prospective visitors to Nova Scotia.

Seasonal air capacity reports track expected changes in the number of airline seats available into Nova Scotia from Canada, the United States and overseas.

### How will things be different in the future?

Both the *Emerging Markets* study and *Nova Scotia Tourism - The Business Advantage* publications, provide insight into the evolving consumer and business environment. A daily e-mail news service is available to increase awareness of tourism issues. Your subscription will provide you with information on the latest trends, research findings and policy developments.

### Who visits Nova Scotia?

The Department carefully tracks visitation to the province on an on-going basis. Through a province-wide system, we are able to estimate the volume of overnight visitors by origin, type of transportation and entry point for each month. The Department's *Visitor Exit Survey* will provide you with a detailed profile of non-resident visitors to Nova Scotia. The 2004 survey collected information on visitor characteristics, spending and activities. Statistics Canada's *Travel Survey of Residents of Canada* allows us to profile travel by Nova Scotians within Nova Scotia. This data provides an overview of the resident travel market.

