



COLLECTING CUSTOMER DATA

**GUIDE FOR SMALL AND
MEDIUM-SIZED TOURISM
ORGANIZATIONS**

-

White paper

ABOUT TOURISCOPE

TouriScope supports tourism professionals by helping them put their best foot forward and to achieve their full potential for success. Our mission is to offer our clients tangible and tailor-made solutions, based on rigorous research and an in-depth understanding of the industry, that bolster strategic decision-making. Our customized services are designed to assist organizations in all stages of their projects, from inception to evaluation.

STRATEGY

In order to help tourism organizations implement and execute their strategies, TouriScope has developed a unique methodology, in collaboration with O Strategies, based on co-creation and continuous improvement. This is the adaptive ART strategy: Analyze-Rethink-Transform. Inspired by new customer-centric approaches and based on recognized traditional methodologies, the ART model aims to continuously improve results and processes.

BUSINESS INTELLIGENCE

TouriScope specializes in the creation and management of strategic knowledge which fuels discussions and drives strategic decisions: monitoring, benchmarking, surveying, economic impact and traffic studies, conferences, workshops, etc. TouriScope is certified by the Quebec Ministry of Tourism to carry out studies on visitor origin, attendance and economic impact that meet its methodological requirements.

COACHING

TouriScope offers advice and support adapted to the reality of each organization and promotes a continuous improvement process in order to make it a learning organization. TouriScope is certified by the Atlantic Canada Opportunities Agency (ACOA) to support tourism businesses in the Accelerated Market Readiness Program.





THIS WHITE PAPER IS DEDICATED TO SMALL AND MEDIUM-SIZED TOURISM ORGANIZATIONS THAT WISH TO IMPLEMENT CUSTOMER DATA COLLECTION.

There are many advantages to customer knowledge, the information that allows your organization to better understand its customers. By gaining a better understanding of your visitors' profile, place of origin, expectations, needs and satisfaction levels, your organization can better tweak its services, provide more personalized offers and enhance your customer's overall experience.

Other types of customer data also promote strategic decision-making. Consider the volume of visitors to your establishment or destination, the traffic on your digital platforms, the average rate sold, revenue per activity or the distribution of sales by booking channel.

This white paper outlines the benefits of collecting customer data, the critical information to collect, and the key indicators you need to better analyze your organization's performance. Simple and affordable methods for collecting this valuable data are detailed, including short surveys, online analytical tools and internal dashboards.



MAIN OBJECTIVES OF THIS WHITE PAPER

- TO DEMONSTRATE THE STRATEGIC NATURE OF COLLECTING CUSTOMER DATA
- TO DEMYSTIFY THE APPROACH
- TO OFFER A TOOLKIT ACCESSIBLE TO ALL

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WHAT ARE WE TALKING ABOUT?

CUSTOMER KNOWLEDGE

Refers to information that allows your organization to better understand its customers

DATA COLLECTION

- Collected from current and potential customers: profile, behaviour, place of origin, expectations, needs and satisfaction
- Collected internally from the organization: overview of your customer relationship management

MULTIPLE BENEFITS

Improves your overall performance

DATA ANALYSIS

For effective analysis, choose indicators that are:

- Relevant
- Easy to interpret
- Comparable

COMPILING THE DATA

- Choosing the right tools is key
- Ensure data reliability through rigorous collection and compilation process



WHAT ARE THE BENEFITS?



KNOW

Find out more about demand



PLAN

Obtain assistance in planning



ADJUST

Identify problems quickly



IMPROVE

Develop a vision for continuous improvement



EVALUATE

Measure the effectiveness of each of your actions

Here are the main benefits of collecting customer data for various functions in your organization.

STRATEGY

- Have new and exclusive information to steer your strategic decisions
- Support your decisions with reliable and current data
- Identify new trends by following the continuous and long-term evolution of your visitors' habits
- Make realistic projections for your organization
- See how you measure up to your competitors
- Set out concrete goals

MARKETING/SALES

- Track changes in customer profiles and behaviours
- Adapt your marketing to changes in your clientele's profile and behaviour
- Identify and better target your customer segments
- Offer customizable products and packages

- Personalize marketing messages
- Validate marketing and distribution initiatives
- Improve performance of marketing channels
- Improving customer experience (before, during, after)
- Improve revenue management

OPERATIONS

- Adjust/improve your services
- Enhance the customer's experience
- Develop new products
- Anticipate attendance and traffic levels/cycles

HUMAN RESOURCES

- Improve schedule planning and management (optimized for expected attendance)



WHAT DATA SHOULD BE COLLECTED?

DATA COLLECTED FROM CUSTOMERS

PROFILE

- Address, phone number, email
- Sociodemographic (age, sex, income, occupation, household, etc.)
- Visitor status: resident, day visitor, tourist
- Origin (geographic markets)
- Group composition
- Leisure interests

VISITING BEHAVIOUR

- Main reason for the visit (travel, business, visit of relatives or friends)
- Motivating factors in choosing your location or destination
- Duration of visit
- Frequency of visit
- Membership (if applicable)
- Amount spent in your establishment or destination during the last visit
- Other activities in the region
- Intentions for future visits, including overnight stays or not

PLANNING AND BOOKING

- Sources of inspiration
- Motivation criteria in choosing your location, activities and destination
- Planning time
- Planning and booking tools
- Type of information consulted
- Booking channels

SATISFACTION

- Satisfaction with online experience and visit
- Expectations and needs
- Suggestions for improvement
- Advice and recommendations

TRAVEL BEHAVIOUR*

- Main reason for the trip
- Behaviour during the stay (accommodation, other activities, transportation, etc.)
- Spending during the stay in the region

* In addition to the visiting behaviour, depending on your type of clientele.

DATA COLLECTED **IN-HOUSE**

OPERATIONS

- Number of customers or admissions per season/ day of the week / day-evening
- Number of members
- Number of regular customers
- Number of complaints
- Wait time

SALES

- Each customer's purchase history
- Number of admissions/nights sold (by type of fare and/or package)
- Overall visitor spending
- Visitor volume by geographic market
- Origin of the tourists
- Customer volume per booking channel (direct, online, third party, etc.)

MARKETING

- Volume and origin of users (visitors) of your website(s)
- Number of sessions and pages viewed on your website(s)
- Traffic sources (organic, direct, paid, etc.)
- Number of followers on your social networks and newsletter



WHICH PERFORMANCE INDICATORS ARE MOST RELEVANT?

HOW DO YOU IDENTIFY THE INDICATORS THAT ARE RELEVANT TO YOUR BUSINESS?

Here is the process leading to the selection of key performance indicators. The example provided is for a tourist attraction:

OBJECTIVE	CRITICAL SUCCESS FACTORS	ACTIONS UNDERTAKEN	KEY INDICATORS
<p>A broader base of younger clients</p> <p>Target: 5% annual increase of clients 17 and under</p>	<ul style="list-style-type: none"> • High value of services • Services tailored to this clientele • Capacity for hosting groups 	<ul style="list-style-type: none"> • Solicit school groups, day camps and campers (60 km radius) • Offer original services/activities 	<ul style="list-style-type: none"> • Share of youth/total number of visitors • Number of school groups/day camps/camp grounds on site • Proportion youth fare revenue/overall revenue

Example taken and adapted from "Participant's workbook from the Symposium on Performance Metrics and Economic Contributions of the Tourism Industry, Transat Chair in Tourism", 2012.

WHAT ARE THE TYPES OF PERFORMANCE INDICATORS ?

There are five main types:



ACTIVITY INDICATORS

- Average length of visit or stay
- Average session time (website)
- Proportion of guests staying on-site (or nearby)
- Proportion of tourists
- Breakdown of sales by customer segment and geographic market

MEANS INDICATORS

- Cost of acquiring a customer (marketing expenses/new customers)
- Average cost per click (total cost of your clicks/total clicks)

EFFECTIVENESS INDICATORS

- Occupancy rate (units sold/units available or number of visitors/total capacity)
- Average sales per client
- Bounce rate (users who entered your website without viewing other pages/total users)
- Conversion rate (number of visitors who booked on your website/total visitors)
- Paying visitors/total visitors to the event

EFFICIENCY INDICATORS

- Productivity ratio : number of visitors per employee (number of visitors / number of employees per shift)
- Average rate
- RevPar (average guestroom revenue X average occupancy rate)

QUALITY INDICATORS

- Complaint rate (number of complaints/number of visitors)
- Satisfaction rate / Net Promoter Score (probability of business obtaining a recommendation)
- Loyalty rate (or retention)
- Social network engagement rate (number of “likes” + comments) / number of followers

HOW CAN INDICATORS BE INTERPRETED EFFECTIVELY?

The indicator must be comparable to a standard or a reference.

- This is achieved in different ways:
 - By setting goals
 - By comparing the indicator over time (monthly, quarterly, annual basis)
 - By weighing the result against industry-wide standards (ex. from industry associations)



HOW IS THE DATA COLLECTED?

TOOLS AVAILABLE: DATA COLLECTED FROM CUSTOMERS

IN YOUR ESTABLISHMENT OR DESTINATION

The information is collected in one of two ways:

- Manual collection in an Excel file, to be completed before, during and after the client's stay by the hospitality staff and/or reservations department
- Comments or appreciation forms filed at the reception desk

The basics

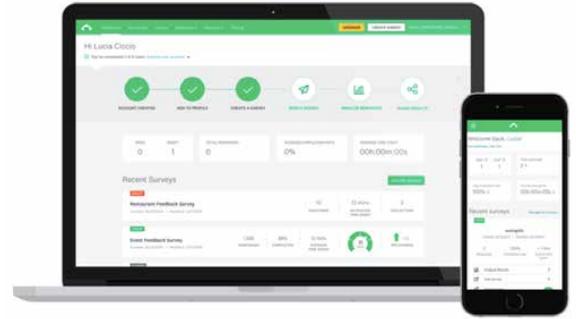
1 st contact date	Surname	First name	Address	Postal code	Municipality	Country
Customer 1

Email	Type of customers	Confirmed booking	Arrival date	Departure date	Additional info
Customer 1

SHORT SURVEYS ON SURVEY MONKEY

This approach, carried out internally or externally, is fast, simple and inexpensive. There are a variety of ways to solicit client feedback:

- An invitation in your newsletter
- An email after their stay or visit
- A link posted on your website
- Coupons provided at the reception desk



ANALYSIS OF REVIEWS ON YOUR TRIPADVISOR ACCOUNT



Tripadvisor



Perfect!

My husband and I stopped by on Sunday before heading home to Saint John. We ended up doing the complimentary wine tasting, then bought a glass of wine and the cheese plate to eat on the patio, and bought a bottle of wine to take home. I would recommend a stop by if you're in the...

Amazing location on the St Lawrence Seaway

"We stopped here for one night on route from Quebec to Montreal. What a little gem. We only booked a couple of hours before arriving having found it on the Internet. Having been on a cruise for two weeks I was desperate for a bath but the room upgrade was a bit pricey just to sate my desire for a bath. So the staff member suggested we use the jacuzzi which was perfectly situated overlooking the river. It was heaven at 10 o'clock at night! The room was spacious and comfy. Breakfast was great and the friendly staff were very helpful. I'm so pleased we stayed here."

367 Reviews

#7 of 76 things to do in St. John's
Points of Interest & Landmarks, Monuments

Traveller rating



What travellers are saying 4.5

Our guide Sabrina was amazing - I had an English tour which was also appreciated. She led us through the prison and courtyard, giving us lots of opportunity for questions.

We visited from a cruise ship. Really amazing tour. The jail is almost medieval in the way inmates were treated until the 1980s. You could almost feel the souls of the inmates as you walked around the ...



TOOLS AVAILABLE: DATA COLLECTED **IN-HOUSE**

GOOGLE ANALYTICS

This platform allows you to learn more about the profile and behaviour of your website's users.

- Indicators and metrics calculated: bounce rate, number of sessions per user, average duration of session, number of pages per session, etc.
- Customizable dashboards to meet your needs

Learn more about [Google Analytics Academy](#)

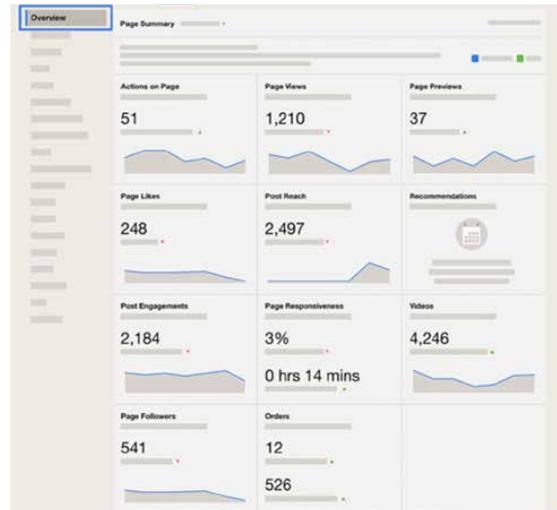
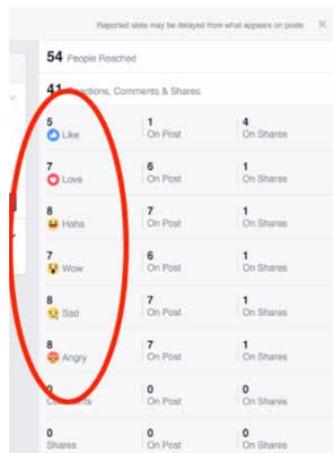


SOCIAL NETWORKS AND NEWSLETTERS

To better understand your audiences, analysis tools are integrated into your social networks.



MailChimp



TOOLS AVAILABLE

The challenge is to bring together in one place all the data collected in order to create an effective management tool. The solution is to use a dashboard.

HERE ARE SOME USEFUL TIPS:

- Choose a limited number of performance indicators relevant to decision-making.
- Create a format that makes it easier to understand (graphics, simple tables) and share it with your entire team.
- Continuously update the data.
- Regularly assess the relevance of indicators to adapt to changes in your environment and new challenges in your organization.

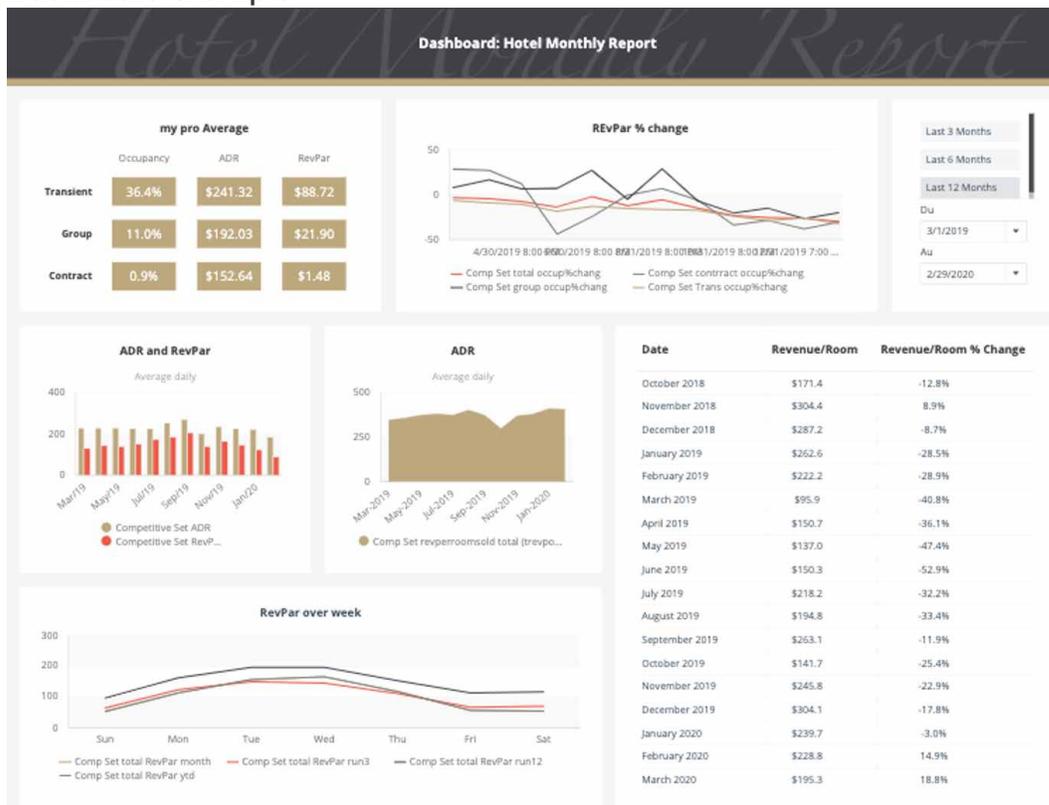
HOW DO I CREATE A DASHBOARD?

The basics →

- Using Excel
- As an integrated function of your PMS (management system)
- Using free or paid online software

← *Advanced*

Dashboard example



Source: Clicdata





Want to learn more about collecting customer data?



Do you want to set up a structured approach and need guidance?



Do you want to outsource this process?

**WE CAN HELP YOU,
CONTACT US!**



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