

Cape Breton Island Tourism Training Network

Cape Breton – Unama’ki Visitor Experience Survey Results

For July to September, 2023

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Survey Overview

The Cape Breton - Unama'ki Visitor Experience Survey was conducted from July through September 2023 as part of a tourism industry data development project conducted by the Cape Breton Island Tourism Training Network, a project overseen by the World Tourism Institute at Cape Breton University. The purpose of this survey is to better understand the experiences and impressions of visitors to Cape Breton - Unama'ki and assist tourism operators, DMOs, local municipalities, and other business and community organizations with tourism-related decisions.

To maximize the reliability of the data, two separate surveys were conducted. The initial survey contained 13 questions and was conducted from June 28th to August 14th. It received 211 responses from visitors from outside of Cape Breton – Unama'ki. The second survey contained 16 questions and was developed based on responses to the initial survey. It was conducted between August 7th and September 4th and received 142 responses from visitors from outside of Cape Breton – Unama'ki. The two surveys shared some questions in common. When appropriate, data from the two surveys has been combined in the analysis.

Data for both surveys was collected on Cape Breton Island at participating tourism destinations including Destination Cape Smokey, Iona Highland Village, the Village of Baddeck, Port of Sydney, Cheticamp Co-op and the St. Peter's Visitor Information Centre. Most surveys were conducted orally by trained graduate students in Cape Breton University's Master of Business Administration in Community Economic Development program. Survey data collected at St. Peter's was gathered using paper surveys by staff at the Visitor Information Center. Additionally, survey responses were collected at the Skye River Trail located in We'koqma'q, however, the response rate was low due to lower number of visitors from outside of Cape Breton - Unama'ki to the cultural site.

Additional location-specific surveys were also created with input from operators from participating locations and distributed over the summer. The survey collectors alternated using the location-specific surveys and the general survey when collecting data at participating locations. These locations include Highland Village, Destination Cape Smokey, the Village of Baddeck and the Sky River Trail. Location-specific data was analyzed and delivered to participating destinations in individual reports.

Question Results

Questions from each survey have been grouped below by five broad categories. The first category contains the general demographic questions which allow for analysis of the experiences of specific groups of visitors. This is followed by questions related to workforce and labour to better understand the impact that labour challenges have on visitor experience. Next is the experiences and offerings section which examines both how visitors felt about their time on Cape Breton – Unama'ki and potential changes to improve their time on the island. This is followed by questions related to the development and promotion of Cape Breton – Unama'ki as a four-season destination. Finally, is the Net Promotor Score section which is a common performance indicator used by tourism destinations as well as most other popular product or service companies to gauge the overall customer experience.

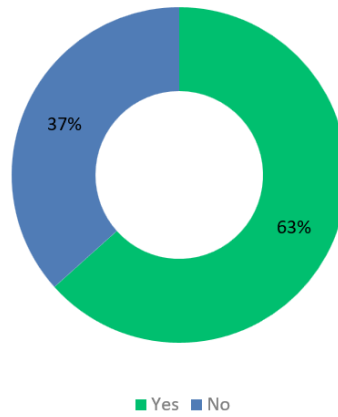
General and Demographic Questions

Both summer visitor experience surveys began by asking participants if they lived on Cape Breton – Unama'ki. Participants who were local were not asked to complete the survey and any responses from

individuals who were local and did not complete the survey were filtered out of the results. As a result, all visitor responses analyzed in this report are from visitors who reside outside of Cape Breton – Unama’ki.

Is this your first visit to Cape Breton Island?

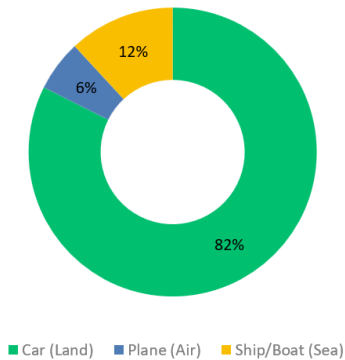
Answered: 142 Skipped: 0



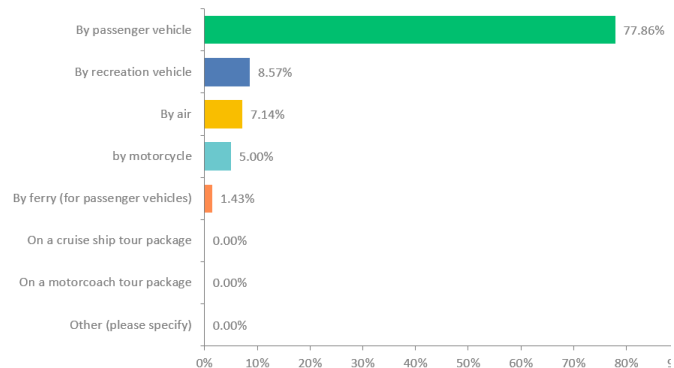
The second visitor survey estimated the percentage of visitors to Cape Breton – Unama’ki who were first-time visitors. 63% of visitors who participated in the survey indicated that this was their first visit to Cape Breton – Unama’ki while 37% were first-time visitors. This question allows for responses to other questions to be filtered to determine if there is a difference between first-time visitors and returning visitors.

How did you travel to Cape Breton Island?

Answered: 210 Skipped: 1



Answered: 140 Skipped: 2



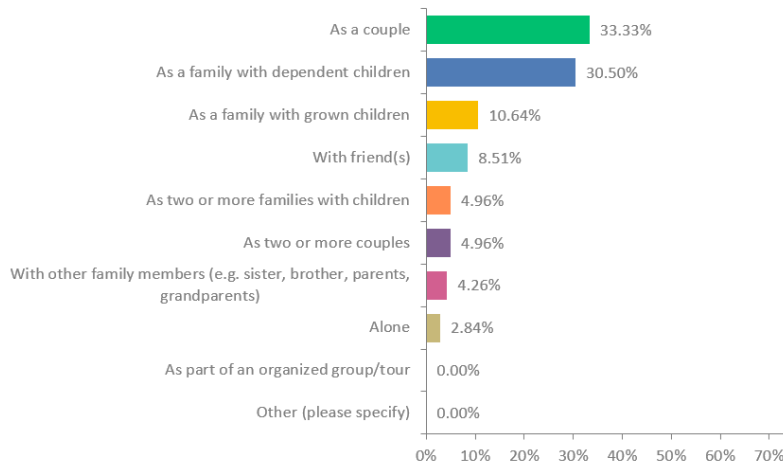
Visitors were asked about their transportation to Cape Breton – Unama’ki. In the initial survey, visitors were asked how they traveled to Cape Breton Island. The purpose of this question was to determine how visitors arrived on the island. Over 80% indicated that they traveled overland by car. 12% indicated that they arrived by ship or boat across the ocean. However, it is unclear how many of the respondents to this question arrived by way of ferry and how many arrived as a passenger on a boat or cruise ship. For the second survey, more options were given to survey participants to try to develop a fuller picture of how visitors travel to the island. When given more precise options, over three-fourths of visitors indicated that they traveled to Cape Breton – Unama’ki by passenger vehicle. Approximately 8.6% indicated that they traveled by recreational vehicle and 5% indicated that they traveled by motorcycle.

This puts the percentage of people who travel around Cape Breton using a private vehicle at over 90%. 7.1% indicated that they traveled by air.

While useful, the responses to these questions were not optimal for understanding visitor behavior and spending patterns. For future visitor surveys this question will be reworded to “What transportation options did you use to get to your Cape Breton destinations? (Select all that apply.)” Visitors will have the option to select which airport they may have used, along with rental car, private car, recreational/camper vehicle, ferry, motorcycle, etc.

What best describes you and/or your travel group?

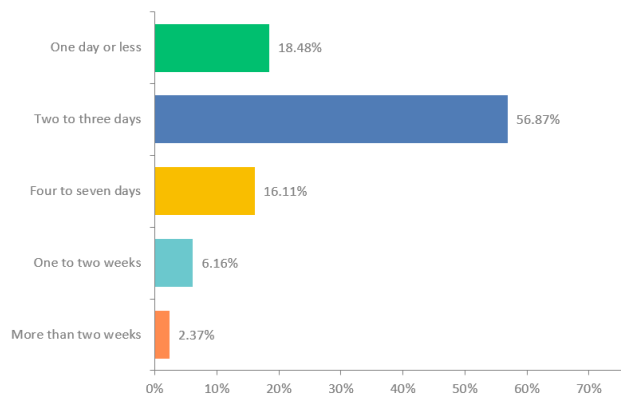
Answered: 141 Skipped: 1



The most common travel group for people who come to Cape Breton – Unama’ki are couples at 33%. However, if we look at all families with children, both dependent and grown, as well as groups of families traveling with children, then over 45% of visitors are families traveling with children, either grown or younger. Overall, the data shows that both couples and families make up the largest share of visitors to Cape Breton – Unama’ki. This question allows for other question responses to be filtered based on travel group and can help identify concerns unique to a specific group.

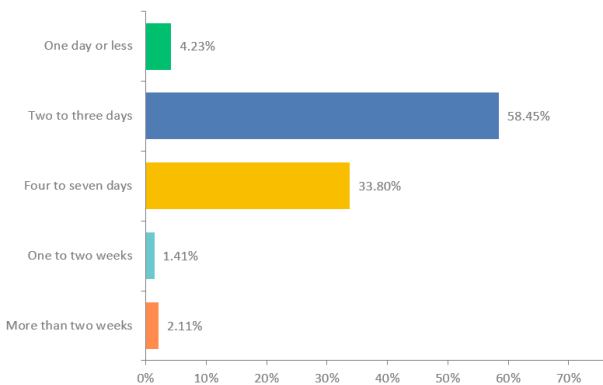
How long have you been on Cape Breton Island?

Answered: 211 Skipped: 0



So far on this trip, how long have you been on Cape Breton Island?

Answered: 142 Skipped: 0

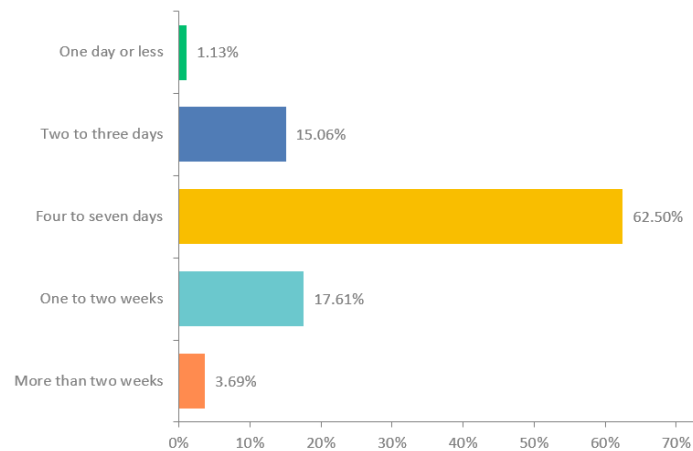


Participants of each of the two surveys were asked about the amount of time they had been on Cape Breton – Unama’ki so far. The main purpose of this question is to allow for analysis of different experiences and impressions based on the length of stay. For example, survey participants who have only been on [Cape Breton Island](#) for one day will have had fewer opportunities to participate in Indigenous tourism experience(s) than those who have been on the island for four or more days. This question allows responses to other survey questions to be filtered based on the amount of time that a participant has spent on Cape Breton – Unama’ki.

For the initial survey, 18% of respondents had been on the island for one day or less and only 16% had been on the island for four to seven days. Of the 142 people who participated in the second survey, only 4% had been on Cape Breton – Unama’ki for one day or less but over 33% had been on the island for four to seven days.

How long in total are you planning on staying on Cape Breton Island?

Answered: 352 Skipped: 1

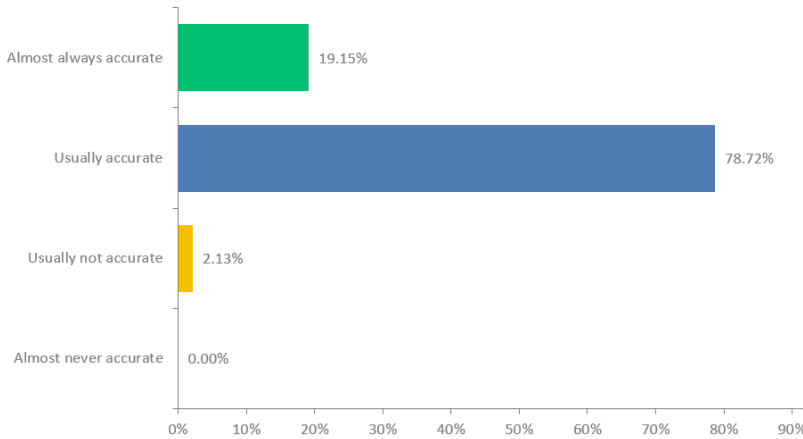


Each survey asked participants about their planned length of stay. Responses from each survey were combined to improve the reliability and simplify the data presentation. Of the 352 survey participants who answered this question, over 83% of respondents planned to stay on Cape Breton – Unama’ki for a minimum of four days. Over 21% of respondents planned to stay for one or more weeks. There is a large drop off between visitors who plan to stay for four to seven days (62%) and those who plan to stay for one to two weeks (17.6%). The data suggests that there is a barrier to visitors planning trips to Cape Breton – Unama’ki for more than seven days.

The Cape Breton Partnership’s Cape Breton Tourism Economic Impact Study from November 2023 found that of four potential future states they analyzed, extending visitor stay duration would have the greatest impact on improving tourism revenue. Future visitor surveys can better explore the differences between these two groups of visitors to answer the question, what could change a four-to-seven-day visitor into a one-to-two-week visitor?

How have you found the accuracy of online visitor information related to Cape Breton Island?

Answered: 141 Skipped: 1



Visitors were asked to identify the accuracy of online visitor information to Cape Breton – Unama’ki. Just under 20% identified online Cape Breton tourism information as being almost always accurate. The vast majority of respondents (78%) identified online tourist information as being “usually accurate”. Only 2% found the online information “usually not accurate”. These percentages stay almost the same when examining only the responses of visitors who have been on Cape Breton – Unama’ki for four or more days.

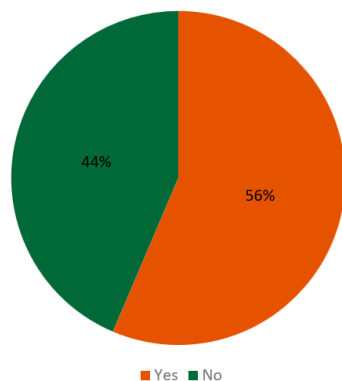
These results do suggest that improvement can be made to the accuracy of online visitor information, but that this is not a major issue for Cape Breton – Unama’ki visitors.

Workforce & Labour

The tourism industry on Cape Breton – Unama’ki has experienced shortages in its workforce. In a survey of tourism operators conducted in the last quarter of 2022 and the first quarter of 2023, 56% of participants said that they did not have enough employees in the 2022 tourism season. Over half of participants identified labour shortages as an anticipated challenge in 2023.

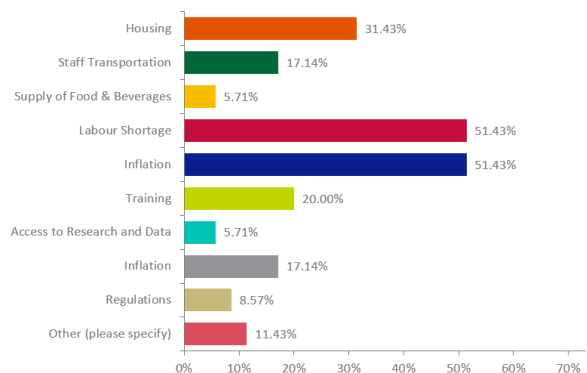
Did you have enough employees this past season (2022)?

Answered: 39 Skipped: 0



What are your anticipated operational challenges for 2023? (Check all that apply.)

Answered: 35 Skipped: 4

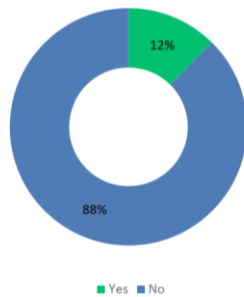


As a result of known labour challenges in the Cape Breton – Unama’ki tourism industry, one of the areas of interest in the visitor surveys was the impact that these shortages have had on the experiences of visitors to the island. This issue has also been explored in surveys of cruise ship passengers at the Port of Sydney. The Port of Sydney survey found, for the most part, cruise ship passengers did not notice workforce shortages. That report can be found on the Cape Breton Island Tourism Training Network’s website: (<https://www.cbtourismworks.ca/completedresearch>).

During your travels around Cape Breton Island, did you encounter businesses that you would have visited but were closed?

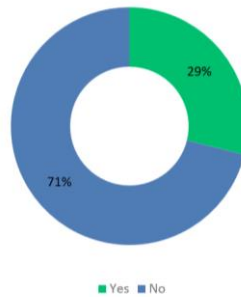
All visitors

Answered: 210 Skipped: 1



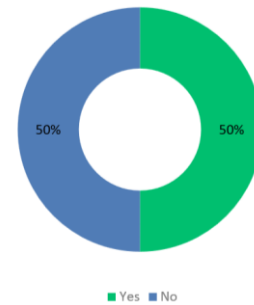
Visitors for four or more days

Answered: 52 Skipped: 0



Visitors for one week or more

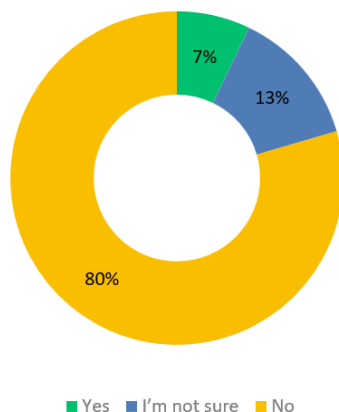
Answered: 18 Skipped: 0



While the majority of total visitors to Cape Breton – Unamaki did not encounter businesses that they would have visited but were closed, a small but significant percentage (12%) did encounter closed businesses. However, when filtered to focus on visitors who have been on Cape Breton Island for four or more days, the number of visitors who have encountered closed businesses that they would have otherwise visited jumps to just under 30%. For visitors who have been on Cape Breton – Unama’ki for one week or more, half have encountered businesses that they would have visited, but were closed. Encountering closed businesses is likely to have an impact on visitor experience and potential length of stay.

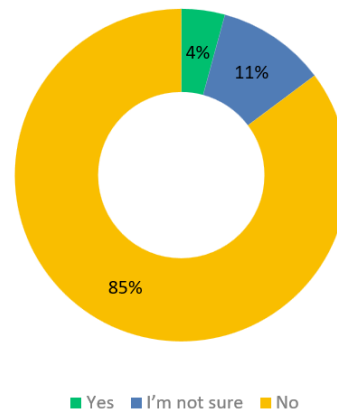
Do you feel your travels on Cape Breton Island were impacted by shortages in staff and labour at places you visited?

Answered: 210 Skipped: 1



Were your travels on Cape Breton Island impacted by workforce shortages?

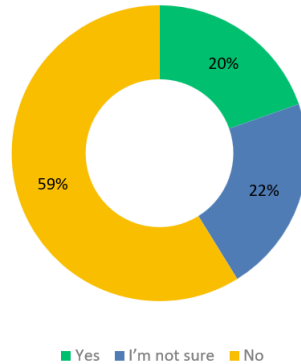
Answered: 142 Skipped: 0



Visitors were asked if they were impacted by workforce shortages at places that they visited. This question was asked on both surveys in two slightly different ways. Both results show that the large majority of respondents did not feel that workforce or labour shortages impacted their experience.

Do you feel your travels on Cape Breton Island were impacted by shortages in staff and labour at places you visited?

Answered: 51 Skipped: 1

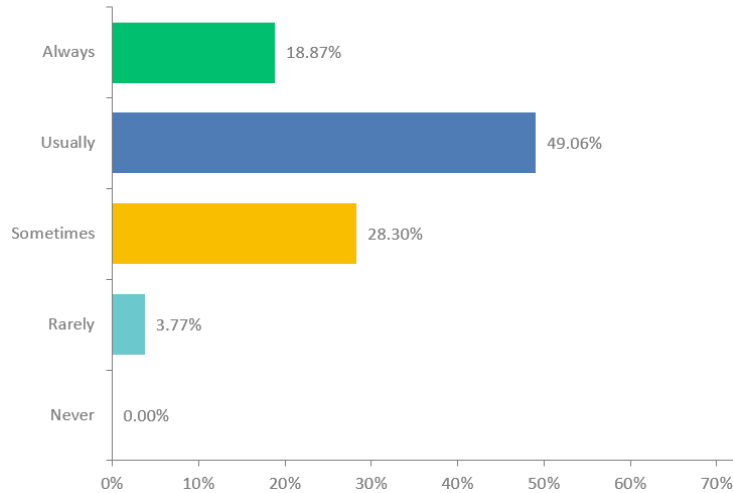


When filtered to only look at the responses from visitors who had been on Cape Breton Island for one week or more, 20% of respondents to the initial survey conducted in July reported that they felt impacted by shortages in staff and labour at places they visited. Another 22% were unsure if they had been impacted or not.

Interestingly, the second survey conducted in August and September found that the percentage of respondents who had been on Cape Breton – Unama’ki for four or more days who felt they had been impacted by workforce shortages was only 5.6%. This suggests that either fewer visitors noticed workforce shortages in the second half of the summer season, or by the second half of the season vacant positions had been filled, or other workforce solutions had been implemented.

How often did employees at sites you visited give you suggestions about other places to visit?

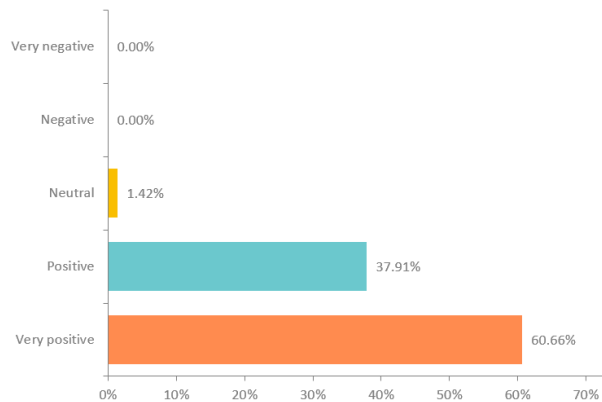
Answered: 53 Skipped: 0



One question that was conducted during this survey period was if employees identified and/or assisted visitors with recommendations for additional attractions. We refer to employees and staff that provide information on Cape Breton Island, Island Ambassadors, Island Ambassadors encourage visitors to explore more of the island and stay longer. Less than 20% of visitors who have been on Cape Breton – Unama’ki for four or more days report that employees at places they have visited always give suggestions about other places to visit. However, almost half of those visitors report that they usually receive suggestions about other destinations in Cape Breton.

How would you rate the customer service you have received on Cape Breton Island?

Answered: 211 Skipped: 0



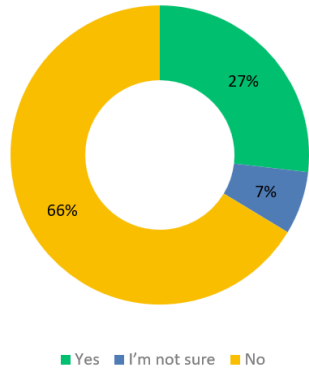
Visitors are happy with the customer services on Cape Breton - Unama'ki. As the results are filtered for visitors who have been on the island for longer, the results become more positive. 73% of visitors who have been on the island for four or more days reported that their customer services experience was “very positive”. These results are in line with results from other Cape Breton – Unama’ki surveys containing questions regarding customer service, hospitality, and friendliness.

Experiences & Offerings

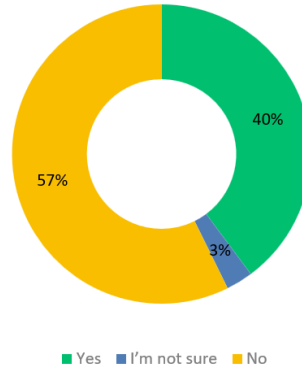
The visitor surveys explored the experiences that brought visitors to Cape Breton – Unama’ki as well as the attractions that were most influential in their travel decisions.

Have you participated in an Indigenous tourism experience on Cape Breton Island?

All visitors
Answered: 350 Skipped: 0



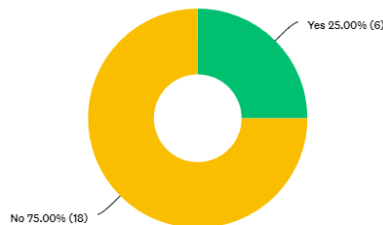
Visitors for four or more days
Answered: 103 Skipped: 2



40% of visitors who have been on Cape Breton – Unama’ki for four or more days report having participated in an Indigenous tourism experience. This suggests a strong interest in Indigenous activities and sites. Future surveys can better explore the customer profiles of potential cultural tourists.

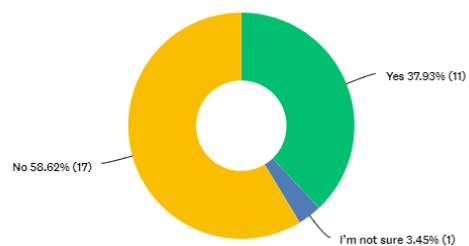
Four or more days and first trip to the island

Answered: 24 Skipped: 0



Four or more days and returning visitor to the island

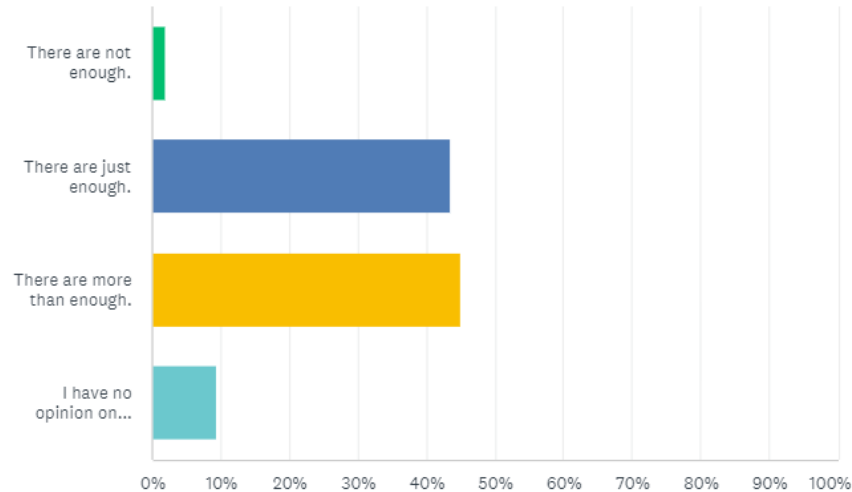
Answered: 29 Skipped: 0



When filtered both for visitors who have been on the island for four or more days and for first-time visitors to the island, only a quarter of survey participants have participated in an Indigenous tourism experience. However, almost 38% of returning visitors to the island report that they have participated in an Indigenous tourism experience.

How do you feel about the number of tourism attractions on Cape Breton Island?

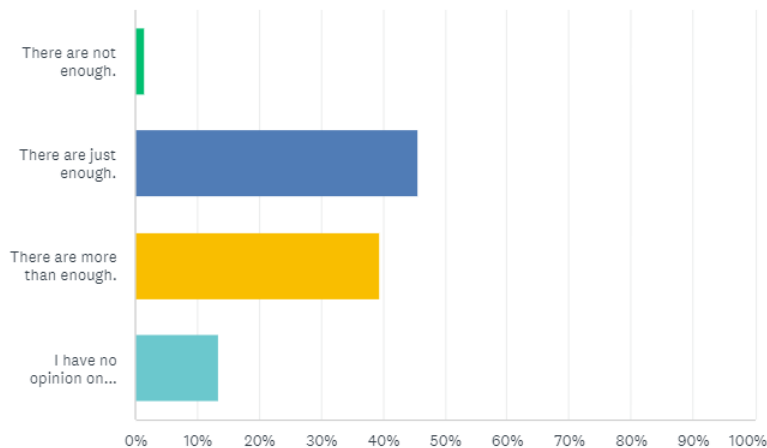
Answered: 211 Skipped: 0



Survey participants were asked about the quantity of *tourism attractions* and *adventure tourism attractions*. Visitors were not provided with definitions for what constituted either a tourism attraction or adventure tourism attraction and so used their own judgement when answering these questions. Most survey participants feel that there are either just enough tourism attractions on Cape Breton - Unama'ki or there are more than enough (88.6%). Just under 2% feel that there are not enough tourism attractions. This remains relatively constant regardless of the amount of time survey participants have been on the island.

How do you feel about the number of adventure tourism activities on Cape Breton Island?

Answered: 210 Skipped: 1



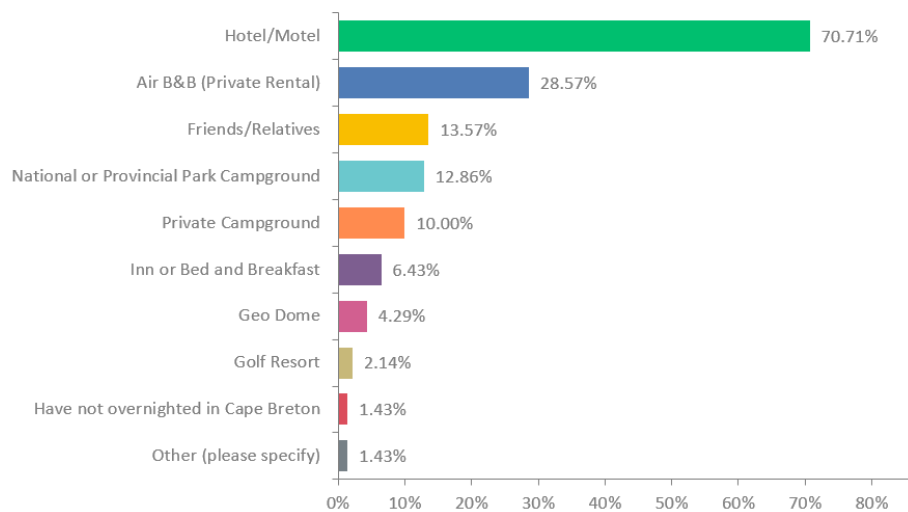
The results when asking about the number of *adventure tourism activities* does not differ significantly from the results when asking about the number of *tourism attractions*. It may have been advisable to

include an age range demographic question to determine if visitors in the younger age brackets are more interested in increasing the number of adventure tourism activities.

For questions regarding the number of tourism and adventure tourism activities there may be survivorship bias skewing the results. That is, the potential survey respondents who would have answered that there are not enough adventure tourism activities on Cape Breton - Unama'ki, likely would not have come to Cape Breton Island (because of a lack of adventure tourism activities) and therefore not have participated in the survey.

What type of accommodations have you stayed in during your Cape Breton Island trip? (Select all that apply.)

Answered: 140 Skipped: 2



Survey participants were asked to identify each type of accommodations they used while on Cape Breton – Unama’ki. Hotels and Motels were the most commonly used accommodation type with 70% of visitors to the island having stayed at least one night in a hotel or motel.

This survey provides a glimpse into the dynamics of the 2023 summer visitor season, shedding light on the significance of the private rental market, including platforms such as Airbnb and Vrbo. Nearly one-third of Cape Breton – Unama’ki visitors choose private rentals for at least one night, underscoring the importance of this market segment. Changes in Provincial policy and evolving customer sentiments toward private rentals could have a notable impact on this sector. Ongoing visitor surveys are crucial to tracking the performance of this market segment and delving into potential reasons behind any noteworthy shifts.

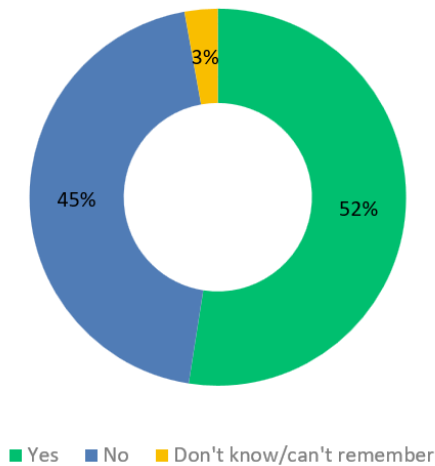
Attention should be directed towards the Cape Breton – Unama’ki Geo Dome market. An analysis of Google listings reveals the presence of four geodesic dome accommodations in Cape Breton. Noteworthy is the fact that just under 5% of visitors indicate having chosen a Geo Dome for their stay. This percentage stands in contrast to the accommodation landscape comprising 133 bed and breakfasts and inns in Cape Breton, where 6.4% of visitors report having spent at least one night. Geo domes appear to wield a disproportionate influence relative to their market representation, suggesting a noteworthy impact within the region.

When the responses for type of accommodations that visitors have stayed at is filtered to only include visitors who have been on Cape Breton – Unama’ki for four or more days, the percentage of visitors who report having stayed at a hotel or motel drops from 70% to 61% and the percentage of visitors who report having stayed with friends or relatives increases from 13.5% to 27%. The percentages of other categories of accommodation remain relatively unchanged.

Have you stopped at a Cape Breton Visitor Information Center during your stay?

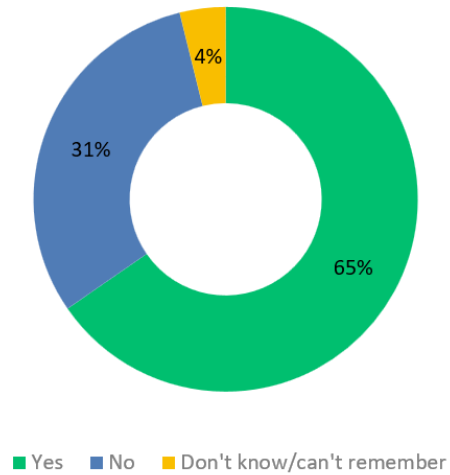
All visitors

Answered: 141 Skipped: 1



Visitors for four or more days

Answered: 52 Skipped: 1



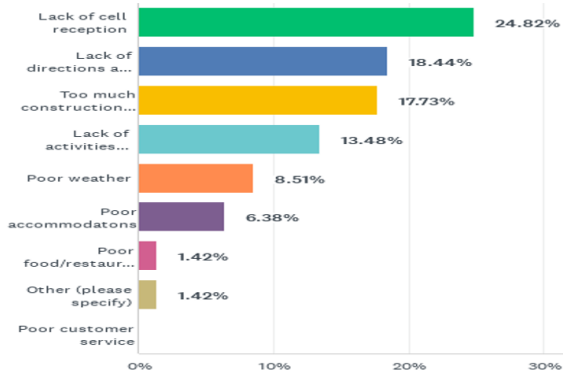
Visitor Information Centers (VIC) appear to be a significant point of contact for visitors to Cape Breton – Unama’ki. For visitors who have been on the island for four or more days, 65% report having stopped at a VIC. It should be noted however that one of the locations where data was collected was the St. Peter’s Visitor Information Center. Presumably, all survey participants who took the survey at that location would have answered in the affirmative to this question and impacted the results. For future visitor surveys, this question will either be modified, dropped, or survey locations will be included in the surveys allowing for filtering of specific sites during analysis.

What has been the most challenging parts of your Cape Breton trip? (Select all that apply.)

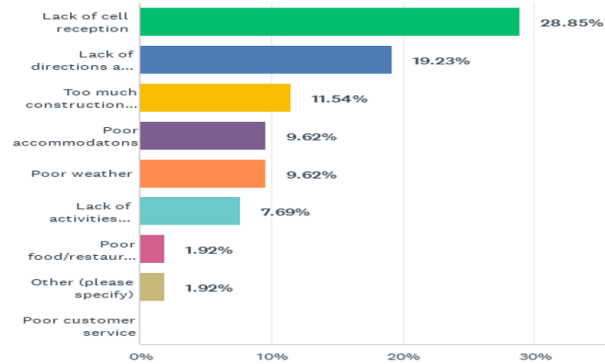
All visitors

Visitors for four or more days

Answered: 141 Skipped: 1



Answered: 52 Skipped: 1



What has been the most challenging parts of your Cape Breton trip? (Select all that apply.)

All visitors

Answered: 141 Skipped: 1

| ANSWER CHOICES | RESPONSES |
|--|-----------|
| Lack of cell reception | 24.82% |
| Lack of directions and attraction signs on the roads | 18.44% |
| Too much construction/road work | 17.73% |
| Lack of activities /events | 13.48% |
| Poor weather | 8.51% |
| Poor accommodatons | 6.38% |
| Poor food/restaurants | 1.42% |
| Other (please specify) | 1.42% |
| Poor customer service | 0.00% |
| Total Respondents: 141 | |

Visitors for four or more days

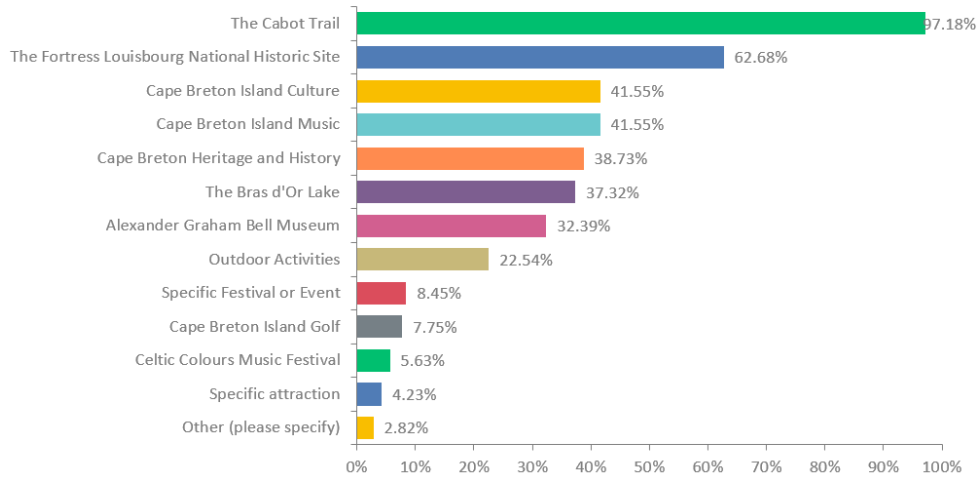
Answered: 52 Skipped: 1

| ANSWER CHOICES | RESPONSES |
|--|-----------|
| Lack of cell reception | 28.85% |
| Lack of directions and attraction signs on the roads | 19.23% |
| Too much construction/road work | 11.54% |
| Poor accommodatons | 9.62% |
| Poor weather | 9.62% |
| Lack of activities /events | 7.69% |
| Poor food/restaurants | 1.92% |
| Other (please specify) | 1.92% |
| Poor customer service | 0.00% |
| Total Respondents: 52 | |

Visitors were asked to identify the aspects of their Cape Breton – Unama’ki trip that they felt were the most challenging. They were presented with a selection of choices and could choose all that they felt impacted them. Regardless of the amount of time that visitors had been on the island, a lack of cell reception was the most commonly identified challenge cited by approximately a quarter of survey participants. This was followed by almost 20% selecting a lack of directions and attraction signs on the roads as a significant challenge in visiting Cape Breton – Unama’ki. Construction and road work came in at the third most commonly chosen challenge. For about 10% of the visitors who had been on the island for four or more days, poor accommodation had been a challenge.

What attractions, if any, helped motivate your decision to travel to Cape Breton Island? (Select all that apply.)

Answered: 142 Skipped: 0



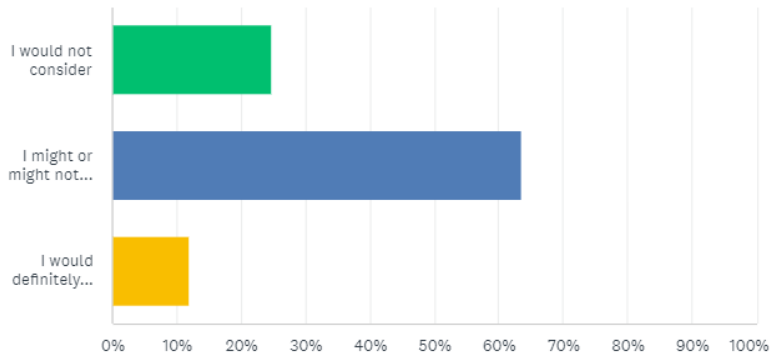
There are two clear draws on Cape Breton – Unama’ki that attract visitors. The first is the Cabot Trail. Almost all (97%) survey participants noted the Cabot Trail as a motivating factor in their decision to travel to the island. This was followed by the Fortress Louisbourg with 62% of survey participants identifying that as a motivating factor. Cape Breton – Unama’ki’s culture, music, and history were each cited by about 40% of survey respondents as motivating attractors.

The Celtic Colours International Festival was cited as a motivating factor by just 5.6% of respondents. However, this survey was conducted in August, and the first two weeks of September 2023, and visitors who would come for the Celtic Colours International Festival would be more likely to arrive at the end of September and the start of October for the festival which took place on October 6 – 14th.

Four-Season Destination

How do you feel about visiting Cape Breton during the winter?

Answered: 211 Skipped: 0



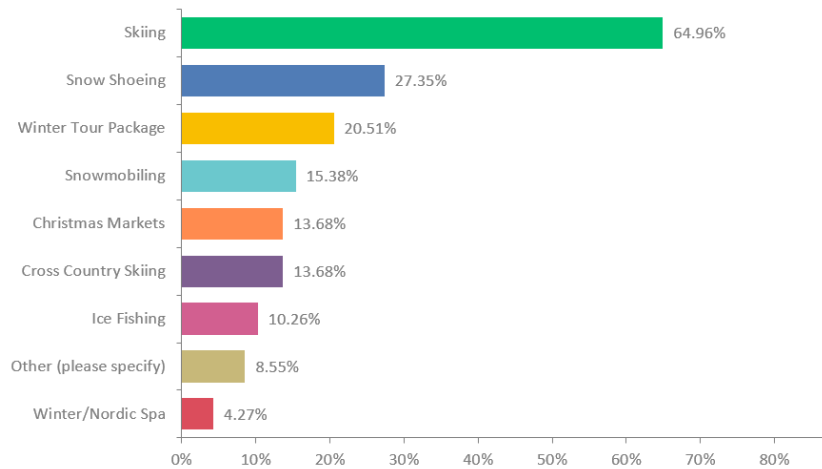
| ANSWER CHOICES | RESPONSES |
|-------------------------------|------------|
| I would not consider | 24.64% 52 |
| I might or might not consider | 63.51% 134 |
| I would definitely consider | 11.85% 25 |
| TOTAL | 211 |

One quarter of summer visitors would not consider Cape Breton - Unama'ki as a winter destination while over 60% of visitors are unsure about visiting the island during the winter. Only about 12% of summer visitors would definitely consider visiting during the winter.

This does show that there is a sizable group of potential winter customers for Cape Breton - Unama'ki, but they would need to be convinced that the island would make for a good winter destination. There will need to be a marketing push to convince those 60% that Cape Breton - Unama'ki would be a good winter destination. Currently, summer visitors do not represent a ready and willing customer base for significant winter tourism.

What would encourage you to visit Cape Breton Island during the winter? (Select all that apply.)

Answered: 117 Skipped: 25

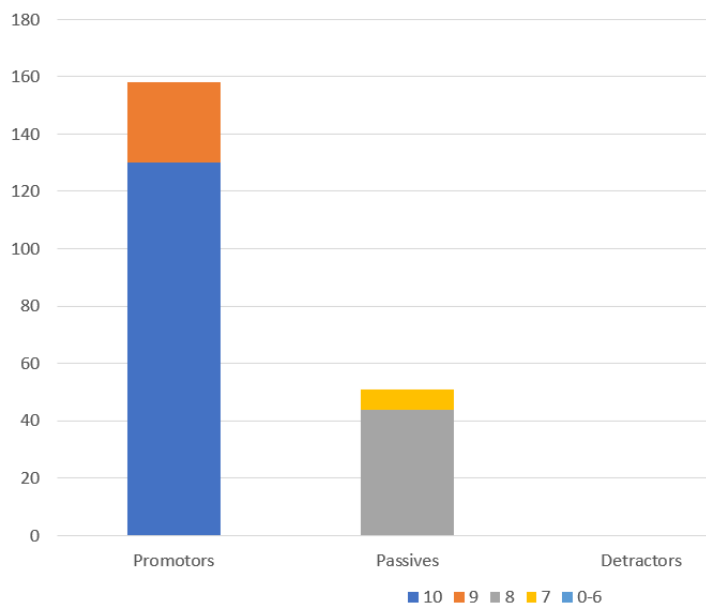


When asked about winter attractors for Cape Breton – Unama’ki, skiing is the most commonly cited activity (65%) that would entice summer visitors to return in the winter. This was followed by show shoeing (27%) and a winter tour package (20.5%). Snowmobiling, Christmas markets, and cross country skiing are each of interest to 13% to 15% of respondents.

Net Promotor Score

A Net Promotor Score (NPS) is a common method for measuring the attitudes that customers have towards a product or service. NPSs are often used to compare similar products or services, or as a key performance indicator to show changes in customer attitudes over time. Destination Canada uses Net Promotor Score Rankings as a performance indicator in their 2021 – 2025 Corporate Plan.

Net Promotor Breakdown

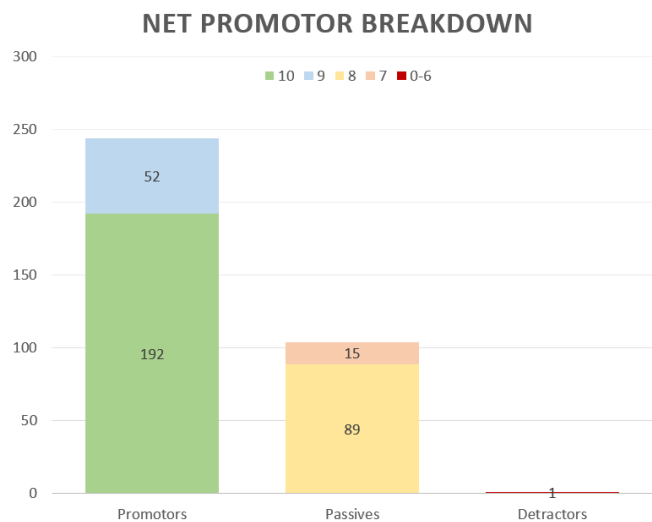


To determine the Net Promoter Score for a destination, visitors are asked to rate on a scale of 1-10 the likelihood for them to recommend visiting the destination to a friend or colleague. Respondents who select 9 or 10 are considered “promoters”. Respondents who select 7 or 8 are “passives”, and respondents who select 0-6 are “detractors”. The Net Promoter Score is calculated by subtracting the percentage of detractors from the percentage of promoters.

A total of 349 Cape Breton – Unama’ki visitors participated in the Net Promoter Score question over the two summer visitor surveys. The results were 244 survey respondents were promoters, 104 were passives, and there was only one detractor. **The Net Promoter Score for general visitors to Cape Breton - Unama'ki is 69.8.** For comparison, other relevant Net Promoter Scores include:

- 2022 Cape Breton Cruise Ship Passengers = 38.3
- 2023 Cape Breton Cruise Ship Passengers = 37.9
- Overall Visitors to Canada = 47
- 2021 Visitors to Saskatchewan = 59
- Ontario Visitors to BC = 63
- 2021 Visitors to British Columbia = 66
- 2021 Visitors to Yukon = 81

The question arises, what is a good Net Promoter Score? This will vary depending on the industry. For example, internet service providers have an average Net Promoter Score of -3, while hotels have an average score of 49 and insurance companies have an average score of 74. The 2023 Cape Breton – Unama’ki Summer Visitor NPS of 69.8 is high when compared to the NPS of general visitors to Canada (47) and in-line with the NPS for visitors to British Columbia (66).



As Cape Breton – Unama’ki evolves as a destination and expands into the four-season market, this Net Promoter Score can be used as a benchmark to determine the effects those changes have on customer satisfaction and the likely number of both repeat visitors as well as new visitors resulting from word of mouth. The island’s general summer visitor NPS can be used as a benchmark for specific destinations to compare their customer’s experiences. This NPS can also be used to compare the experiences of specific segments of visitors by age, nationality, income level, etc. Additionally, it can be used as a benchmark to



understand the experiences of off-season visitors. Net Promotor Scores can also indicate changes in customer demographics, expectations, and values over time.

Conclusion

This report is a snapshot of the experiences and attitudes of visitors to Cape Breton - Unama'ki in the summer of 2023. The data contained in this report can be viewed as customer feedback. Understanding customer experience will give operators and marketing organizations valuable perspectives on how to improve destinations and the most effective uses of marketing resources.

For any questions regarding this survey or other Cape Breton - Unama'ki tourism research or related questions, please contact Dr. Darren Downing (Darren_Downing@cbu.ca) Research Lead at the Cape Breton Island Tourism Training Network.