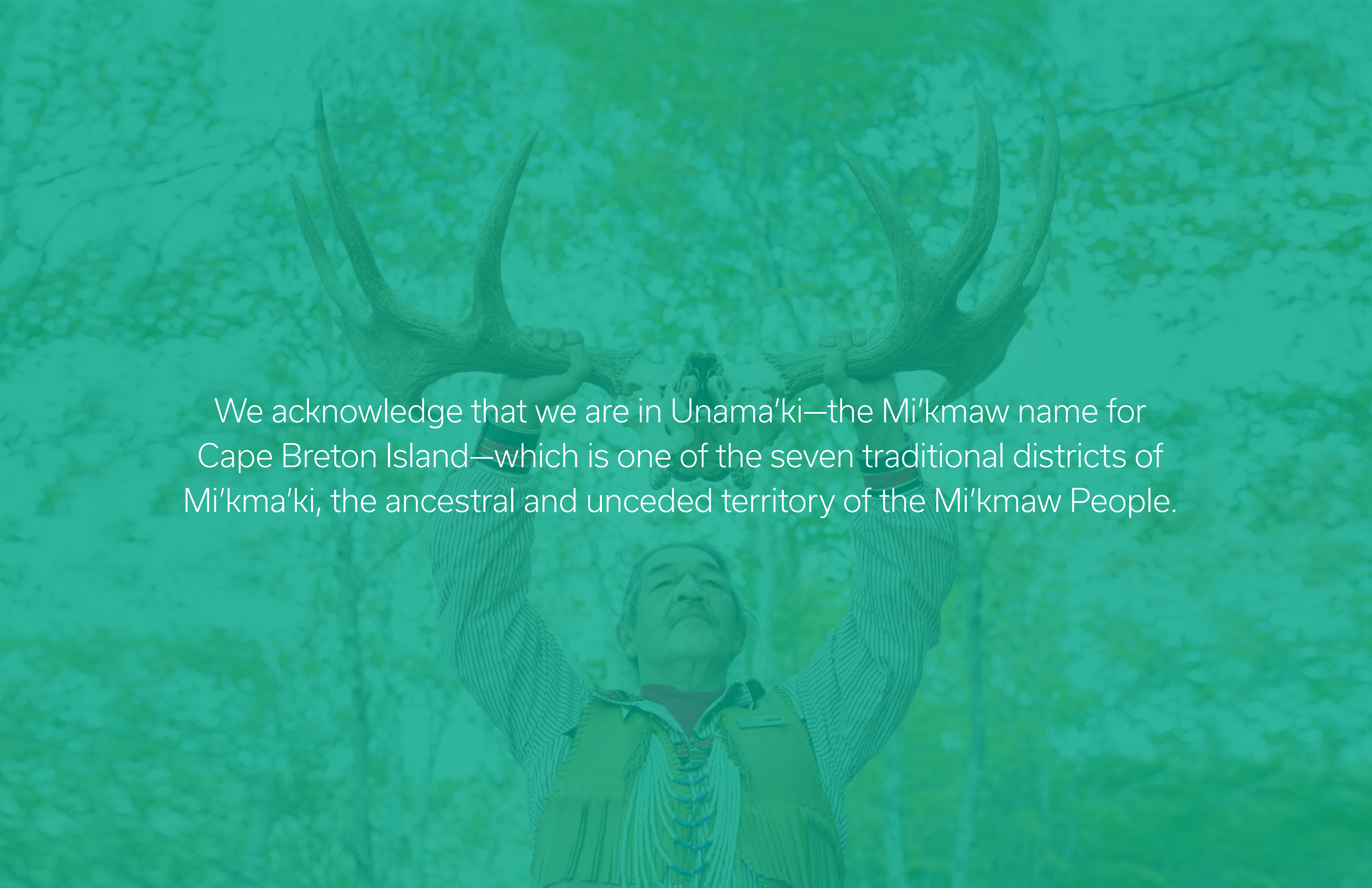




RiseAgain2030

Cape Breton Island Destination Development Strategy

Cape Breton
Island
your heart will never leave.

A person, likely a Mi'kmaq, is shown from the chest up, holding a large set of antlers high above their head with both hands. They are wearing a light-colored, vertically striped long-sleeved shirt and a tan vest. The background is a dense forest of green trees. The entire image is overlaid with a semi-transparent teal filter.

We acknowledge that we are in Unama'ki—the Mi'kmaw name for Cape Breton Island—which is one of the seven traditional districts of Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaw People.



Table of Contents

- 1. Introduction and Background
 - 1.1 Introduction to the Strategy 04
 - 1.2 Planning and Development 2010-20 05
 - 1.3 Methodology 06
 - 1.4 Pandemic Considerations 08
- 2. Alignment and Success Network
 - 2.1 Alignment and Relevant Strategies 11
 - 2.2 Success Network 13
- 3. Current State Assessment
 - 3.1 Cape Breton Island Economic Overview 17
 - 3.2 Tourism Performance 18
 - 3.3 Visitor Profile 23
 - 3.4 Motivating Experiences 25
 - 3.5 Marketing Levies 27
 - 3.6 Destination NEXT Assessment 28
- 4. The Planning Context
 - 4.1 Emerging Tourism Trends 33
 - 4.2 Destination Development Approaches 35
 - 4.3 Tourism Clusters 38
- 5. Key Findings
 - 5.1 Key Findings 41
- 6. The Strategic Direction
 - 6.1 Values and Principles 50
 - 6.2 Vision and Goals 51
 - 6.3 Development Themes 52
- 7. Strategic Objectives and Actions
 - 7.1 Strategic Objectives and Actions 55
- 8. Measuring and Reporting Progress
 - 8.1 Measuring and Reporting Procedures 82

1 Introduction & Background





1.1 Introduction to the Strategy

Cape Breton Island is renowned as one of the most beautiful islands in the world and has been rated the #1 Island in North America in *Condé Nast Traveler's Readers' Choice Awards* for the past two years and #1 Island in Canada in *Travel + Leisure's World's Best* for three years running. With breathtaking scenic landscapes, rich living cultures, and a strong inventory of tourism experiences, the Island makes the bucket list of many who become aware of Cape Breton and her offerings.

Over the past decade, Cape Breton Island's visitor economy has witnessed significant growth. Since the introduction of the Cape Breton Island Marketing Levy and dedicated federal government funding which provided destination marketing resources for the Island, coupled with significant private and public sector investments in tourism infrastructure and operations, the Island had seen over 320,000 incremental room nights sold from 2012 to 2019 and a 400% increase in destination website traffic. These results have provided a return on investment of \$27 in incremental tourism revenues for every dollar collected through the Marketing Levy and \$34 for every dollar invested in destination marketing by the federal government, not including any spin-off impacts. This has led to a tourism workforce of approximately 5,600 jobs as of the 2016 census and approximately 740 businesses.

However, the growth also created challenges for the industry. For example, strong demand for Airbnb accommodations has led to some properties that had previously been long-term rental properties being turned into Airbnb's, which had an exacerbating effect on labour force shortages in some communities. Although over-tourism has not been a significant concern to date on the Island, heavy traffic on the Skyline Trail may be an early indicator of what is to come.

Despite these challenges, there are a myriad of opportunities, from nurturing increasing interest in Mi'kmaw cultural experiences to developing new adventure tourism experiences. Cape Breton Island has the potential to reach a new level in its development as a destination over the next

ten years, once the current pandemic is behind us. With a bold vision and strategic direction, it can become one of the most dynamic and innovative tourism economies in the country.

Coinciding with the development of Cape Breton Island as a tourism destination, there is potential for the development of vibrant tourism clusters. Within cluster development, this strategy will address such areas as education and training, tourism innovation, linkages with the tech community, and thought leadership.

This strategy supports and guides the long-term growth of tourism for Cape Breton Island by harnessing planning, policy, and capacity building efforts to ensure industry stakeholders are well-positioned to make future strategic decisions, address impediments to tourism growth, and capitalize on tourism opportunities. The goal is to make Cape Breton Island a world-class, four-season tourism destination with dynamic tourism clusters – remarkable products and experiences for visitors that optimize tourism revenues and supporting businesses and institutions that leverage the destination for research, innovation, and economic growth.

The strategy also acknowledges and places great emphasis on the mutually-reinforcing relationship between the tourism and culture sectors. The support, enhancement, and sustainability of the culture sector is paramount to ensuring the long-term health of the tourism sector on the Island, and vice versa.

The development of the strategy has been led by Destination Cape Breton (DCB), but was developed in collaboration with the Atlantic Canada Opportunities Agency, Parks Canada, Province of Nova Scotia, five Island municipalities, Cape Breton Partnership, Cape Breton University, and NSCC. It will be owned by all partners, stakeholders, and residents of Cape Breton Island. It will provide a shared vision that drives priorities which will lead to wealth creation and sustainable economic growth for the Island's tourism economy and its residents. The strategy will provide guidance for investment along with a framework to ensure continued tourism growth that is both sustainable and enriching to the quality of life of residents.

1.2 Planning and Development 2010-20



Before charting a course for the future, it is important to understand how we came to the present situation. Destination Cape Breton was established as the destination marketing organization (DMO) for the Island in 2010. The establishment of the DMO was directly tied to the implementation of the Cape Breton Island Marketing Levy, which was applied to all fixed-roof accommodations with ten or more rooms. At the time of its formation, the market was changing from a touring visitor to an experientially-driven visitor and DCB had to adapt to this evolution.

The DMO followed the Atlantic Canada Opportunities Agency's (ACOA) Tourism Plan and embraced its continuum that research drives product innovation, which in turn drives marketing. DCB invested in travel intention and conversion surveys to better understand the Island's visitor and what motivates them. The DMO began utilizing the Explorer Quotient segmentation approach that had been developed by Destination Canada. Extensive research was conducted to assess the product in such areas as outdoor adventure, winter tourism, Indigenous tourism, performing arts, and culinary. Using the ACOA Toolkit, product innovation

initiatives were undertaken to enhance the market-readiness of core and niche experiences. With market-ready experiences, DCB - often through partnerships with Tourism Nova Scotia - marketed Cape Breton Island as a premier tourism destination to the leisure traveler and to niche markets in golf, small ports cruise, and events.

Technology has also had a huge influence on travel decision making and marketing over the past decade. Much of destination marketing has shifted from traditional marketing channels and tactics to digital. The past few years have seen the rise of the social media influencer and the potential for advocate marketing using local brand ambassadors. This has led to the development of the communities of interest (COI) marketing approach by ACOA, which has been embraced by DCB.

Coinciding with the development of the DMO, significant investments were being made by the private and public sectors. Cabot Links was launched in 2011 with Cabot Cliffs coming online in 2016, both courses complemented by significant investments in accommodations, real estate, food and beverage, and spa facilities. Keltic Lodge at the Highlands saw new ownership that brought significant investments in the property. The Lakes at Ben Eoin Golf Resort was developed from the purchase and development of The Lakes Golf Course, the Birches at Ben Eoin, and the land that houses the Ben Eoin Marina. The Hampton Inn by Hilton Sydney was constructed to adjoin the Membertou Trade & Convention Centre and has recently been expanded. There has been a significant investment in glamping accommodations with geodesic domes, yurts, glamping tents, oTENTiks, and more. New, intimate and engaging culinary experiences were developed with Wood Road, GRÁ, Williams Beach House, among others. Recently, a substantial new development has been initiated at Cape Smokey in the Ingonish area.

The public sector has invested in many of the above projects as well as in infrastructure and experience development. There have been significant road investments in the Cabot Trail, an investment in a second cruise ship berth at the Port of Sydney, and an upgrade to the St. Peter's Canal, as just a few examples.

1.3 Methodology

The development of this strategy was comprised of three phases:

1

A comprehensive research review

PHASE 1:
This phase included the following components:

- A statistical analysis of the tourism sector on Cape Breton Island utilizing existing data sources;
- A thorough review of strategic and planning documents that are relevant to the Cape Breton Island tourism sector;
- An analysis of similar models for successful destination and tourism cluster development; and
- An in-depth review of current tourism market trends, destination development activities, and issues that are directly impacting tourism, such as the shared economy, labour shortages, policies and regulations, etc.

2

Stakeholder engagement

PHASE 2:
This phase consisted of:

- Hosting a Tourism Innovator Summit with Cape Breton University's World Tourism Institute;
- A Destination NEXT assessment of Cape Breton Island as a tourism destination;
- A series of engagements with key stakeholders in the following areas:
 - Outdoor adventure;
 - Culture;
 - Heritage;
 - Culinary;
 - Cruise;
 - Golf;
 - Marine tourism;
 - Transportation;
 - Tourism education and research;
 - Innovation; and
 - Economic development.

3

Strategy development

PHASE 3:
The final phase of the strategy was the development of this document, including:

- The crafting of a vision for the Cape Breton Island destination and tourism cluster in 2030;
- Identification of strategic priorities and strategic objectives to achieve the vision;
- Development of an action plan to achieve the goals and strategic objectives; and
- Development of an accountability model that measures and reports on the progress of the strategy to all stakeholders.



1.4 Pandemic Considerations

Much of the development of this strategy occurred during the COVID-19 pandemic. This pandemic has had a monumental impact on travel and tourism and has had a devastating effect on the Island's tourism industry. However, despite the current situation, the vision and prescribed mid- to long-term objectives within this strategy still hold true for a post-pandemic reality. Where necessary, the strategy has been adjusted with respect to shorter-term objectives given that it is likely going to take a few years to get back to pre-pandemic visitation levels.



2 Alignment and Success Network



2.1 Alignment with Relevant Strategies

Cape Breton Island is one of the destination regions within Nova Scotia, as defined by Tourism Nova Scotia. Nova Scotia falls within an Atlantic regional context for tourism planning through the leadership of ACOA, its Tourism Atlantic unit, and the Atlantic Canada Agreement on Tourism (ACAT). Atlantic Canada falls within the larger Canadian destination, which is promoted by Destination Canada. From a visitor standpoint, they may see Cape Breton Island, Nova Scotia, the Maritimes, Atlantic Canada, or Canada as their destination depending on the scope of their travels.

In addition to broader destination planning, there are relevant sub-sectoral or cross-sectoral strategies that must be taken into consideration, such as Indigenous tourism strategies or creative economy strategies. Within economic development, it's critical that there is alignment with the Cape Breton Partnership, Develop Nova Scotia, Cape Breton University, and NSCC, among others.

As such, it's important for the strategy for Cape Breton Island to be aligned with the strategic direction of each of these partners. From a practical perspective, strategic alignment generally indicates agreement in principle and can facilitate a more direct path to support for recommended actions. The alignment of strategies leverages the research and thought leadership that was applied to each and reinforces a collaborative approach to destination and economic development.

This strategy has been designed to be in alignment with these key strategies:

Federal Tourism Growth Strategy

This strategy has three pillars:

- *Building tourism in Canada's communities* – with a focus on winter and shoulder-season tourism, Indigenous tourism, rural and remote tourism, farm/sea-to-table and culinary tourism, and inclusive tourism.
- *Attracting investment to the visitor economy* – establishing Tourism Investment Groups in every region to enable the development of impactful tourism projects and attracting private investment.
- *A renewed focus on public-private collaboration* – establishing stronger partnerships to tackle barriers to growth such as the high cost of travel to and within Canada, labour shortages, and the lack of investment.

ACOA Tourism Innovation Action Plan

This strategy focuses on growing tourism through increasing yield (extracting a higher return from existing visitors) and “plant” maximization (season expansion and capacity growth). To do so, it recommends:

- A focus on the communities of interest marketing approach;
- Creating new value-added products and experiences;
- An emphasis on product clustering; and
- Fostering an excellence in digital marketing capabilities.

Tourism Nova Scotia Strategic Plan 2018-2023

This strategy, which focuses on driving export revenue, has four pillars:

- Attract first-time visitors;
- Invest in markets of high return;
- Focus on world-class experiences; and
- Build tourism confidence.

The strategic plan describes the roles of communities, government, industry stakeholders, and Tourism Nova Scotia.

Develop Nova Scotia Business Plan

Within its mandate to lead sustainable development of high potential property and infrastructure to drive inclusive economic growth in Nova Scotia, the Develop Nova Scotia Business Plan includes a focus on the revitalization of tourism icons, community placemaking, working waterfronts (including a focus on marine tourism), and connected communities, among other areas.

Nova Scotia Culture Action Plan

This plan is focused on celebrating and sharing the province's culture, creative sector, and diverse communities. It has six themes, within which there are numerous actions directly related to tourism:

- Promote Mi'kmaw culture;
- Promote creativity and innovation;
- Strengthen education, partnerships, and understanding;
- Advance cultural diversity;
- Excellence in cultural stewardship; and
- Drive awareness and economic growth of the culture sector.

Nova Scotia Event Strategy

This strategy is designed to position Nova Scotia as a leader in events. It has six pillars to provide focus for the development and attraction of events:

- New event funding themes (culture, major sports, winter, Generation Next, “Lion”, and festival and community events);
- Event environment;
- Education and capacity building;
- Positioning Nova Scotia;
- Measurement; and
- Legacy.

Cape Breton-Unama'ki Economic Development Plan

This strategy is being developed by the Cape Breton Partnership and, while yet to be released, it will have several themes:

- Driving inclusive growth;
- Cluster development;
- Supporting entrepreneurship;
- Addressing infrastructure gaps;
- Leveraging major capital projects;
- Addressing labour shortages and skills gaps; and
- Reversing population decline.

Indigenous Tourism Plans:

- **Indigenous Tourism Association of Canada (ITAC) Five-year Plan**
- **Pan-Atlantic Indigenous Tourism Framework**
- **Cultural Tourism Implementation Plan for the Mi'kmaq of Nova Scotia**

These plans are aligned and have a common focus on:

- Product development with a focus on authenticity;
- Mi'kmaq leadership;
- Marketing; and
- Developing partnerships.

Cape Breton University Strategic Plan

CBU's Strategic Plan has five strategic directions, including one that is most relevant to tourism development – championing the Island's prosperity. Under this direction, the University will prioritize initiatives in areas of external need and internal expertise, such as health, tourism, cultural heritage, science-based innovation, and entrepreneurship. It will also work with businesses, community groups, municipal governments, and individuals to develop leadership, improve communication, and advance mutual goals.

2.2 Success Network

The success of the implementation of this strategy is dependent on the recognition that many stakeholders will have a role to play. The Success Network identifies the key stakeholders who will have a role to play, whether large or small, in the implementation of strategic priorities and actions. It includes:

National

- Atlantic Canada Opportunities Agency (ACOA)
- Parks Canada

First Nations

- Eskasoni First Nation
- Membertou First Nation
- Potlotek First Nation
- Wagmatcook First Nation
- We'koqma'q First Nation
- Nova Scotia Indigenous Tourism Enterprise Network (NSITEN)

Provincial

- Tourism Nova Scotia
- Develop Nova Scotia
- Events Nova Scotia
- Nova Scotia Communities, Culture and Heritage
- Nova Scotia Labour and Advanced Education
- Nova Scotia Inclusive Economic Growth
- Nova Scotia Transportation and Active Transportation
- Nova Scotia Environment and Climate Change
- Nova Scotia Lands and Forestry
- Nova Scotia Immigration and Population Growth
- Tourism Industry Association of Nova Scotia (TIANS)
- Restaurant Association of Nova Scotia (RANS)

Municipal

- Cape Breton Regional Municipality
- Municipality of Inverness County
- Municipality of Richmond County
- Municipality of Victoria County
- Town of Port Hawkesbury

Regional

- Destination Cape Breton
- Cape Breton Partnership
- Cape Breton Centre for Craft and Design
- Cape Breton Music Industry Co-operative
- Cape Breton Food Hub
- Bras d'Or Lakes Biosphere Reserve Association
- Bras d'Or Lakes Collaborative Environmental Planning Initiative (CEPI)

Transportation

- JA Douglas McCurdy Sydney Airport
- Allan J. MacEachen Port Hawkesbury Airport
- The Port of Sydney
- Marine Atlantic

Educational

- Cape Breton University (including the World Tourism Institute)
- NSCC

Local

- Cape Breton Regional Chamber of Commerce
- Strait Area Chamber of Commerce
- Community development organizations
- Tourism operators
- Arts, culture, and heritage organizations
- Harbours and marinas
- Clubs/volunteer groups
- Residents



3 Current State Assessment

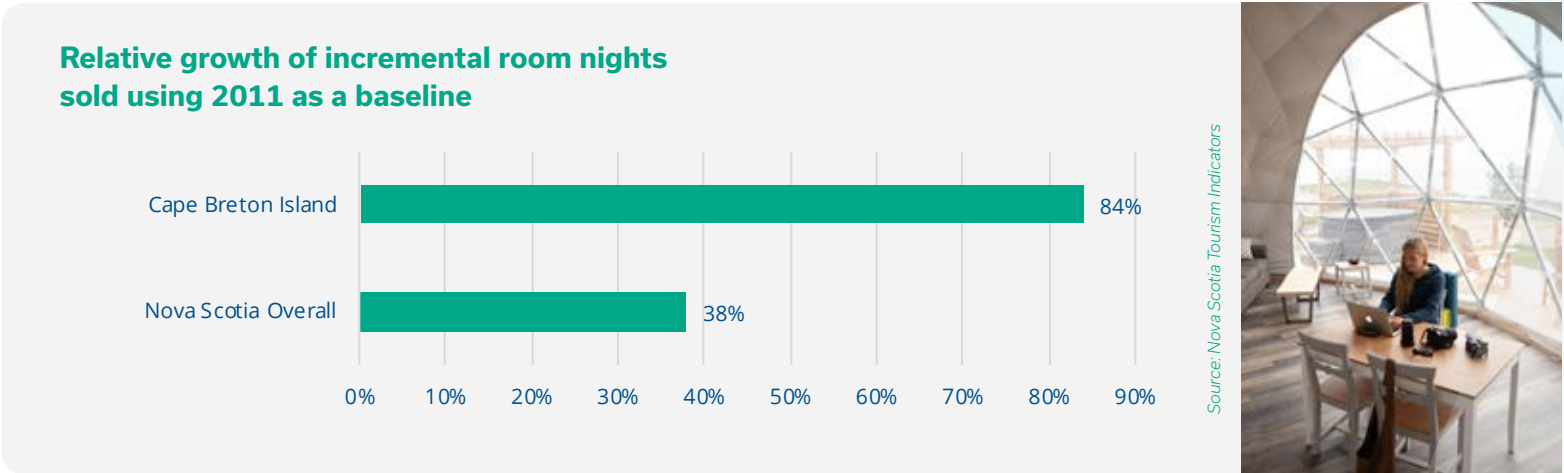


3.1 Cape Breton Island Economic Overview

Cape Breton Island’s economy has experienced ups and downs since the closure of the coal mines and steel plant and the collapse of the ground fishery in the 1990’s. There had been steady outmigration to a point where the Island’s population had fallen to 132,010 by the 2016 Census. However, positive signs have pointed to a reversal of this trend in the past few years.

Boosted by international student enrollment at Cape Breton University and new immigration, the population of the Island increased in 2019 and now stands at 134,850. Nova Scotia seafood exports, including Cape Breton, have been growing and eclipsed \$2 billion in 2019. Hundreds of millions of dollars in new public and private infrastructure investment have been announced for the next few years and other exciting projects are in development.

A particular bright spot for Cape Breton Island has been the tourism industry, which had experienced strong growth over the past ten years leading up to the pandemic. This growth corresponds to the introduction of the Cape Breton Island Marketing Levy and increases to the dedicated funds to promote the Island. The growth is illustrated in the chart below.



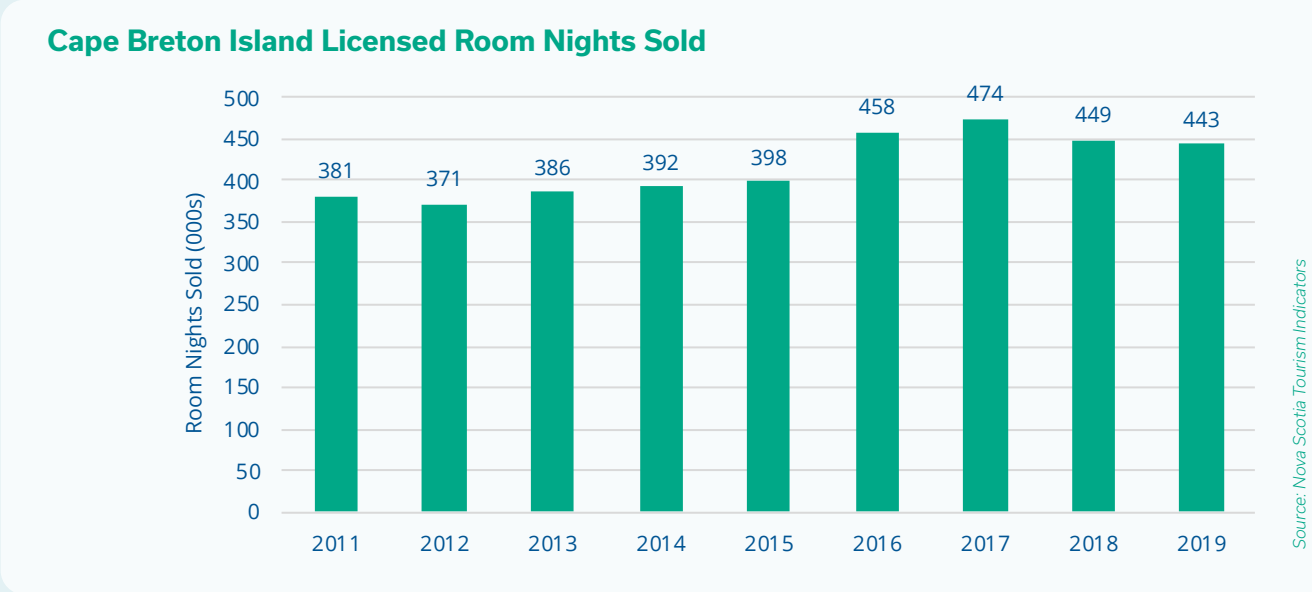
Using 2011 as a baseline, the last year before the Cape Breton Island Marketing Levy was implemented, Cape Breton has had 321,000 cumulative incremental room nights sold over the ensuing period up to 2019. In relative terms compared to the baseline, that is an 84% growth rate, which more than doubles the relative growth in Nova Scotia overall. It should be noted that this only includes licensed room nights sold and not unlicensed shared economy unit nights sold.

Of course, the COVID-19 pandemic has significantly impacted this growth trend. Tourism Economics has forecast a post-pandemic rebound for tourism, however, it may take two to three years to return to 2019 numbers.

3.2 Tourism Performance

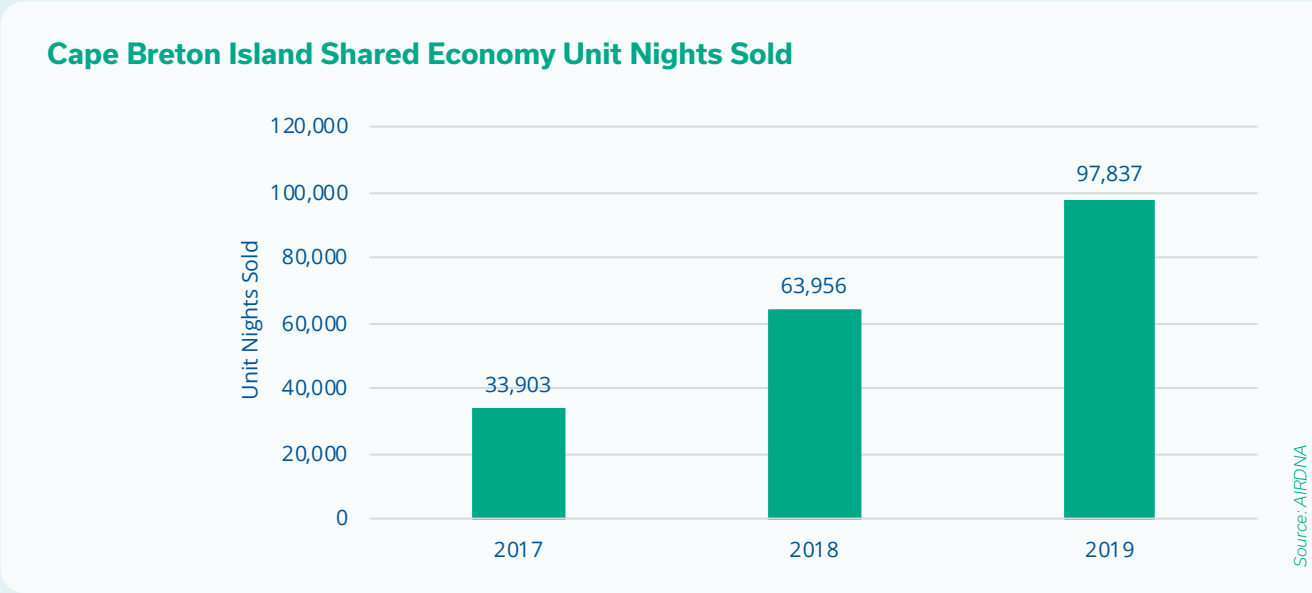
Over the next few pages, various data sources will paint a picture of the performance of the industry as a foundation to build upon.

Accommodation Data
With limited data that is specific to Cape Breton Island, accommodation data is one of the key indicators that is relied upon to measure the success of the season and the seasonal nature of our industry.



Licensed room nights sold increased by 60,000 in 2016, a year that also saw the “Trump Bump”. However, it was also in the previous year that Destination Cape Breton, through partnership with Tourism Nova Scotia, began marketing in the Ontario market, which has seen extensive growth.

Licensed room nights grew even higher in 2017, coinciding with the Canada 150 celebrations and free admissions to Parks Canada sites. Although 2018 and 2019 showed a drop in licensed rooms nights sold, another factor has impacted the data – the shared economy.





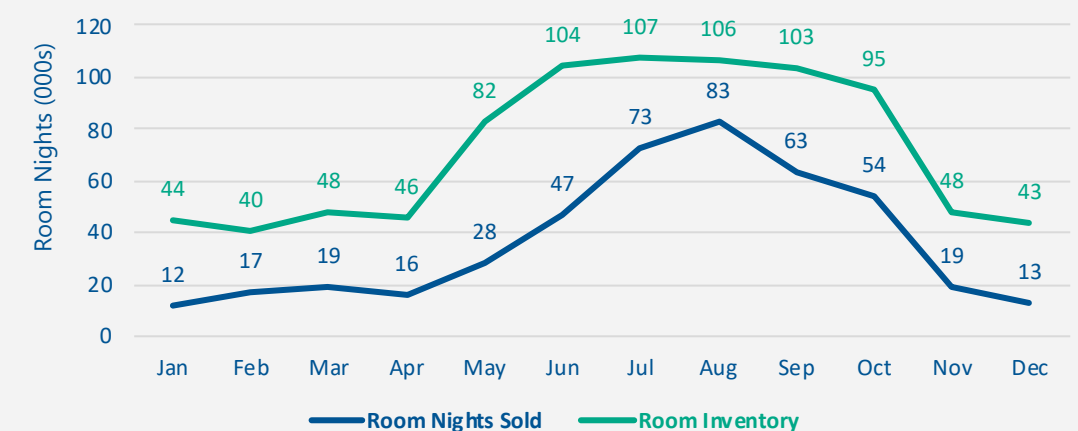
Shared economy unit nights sold grew significantly from 2017 to 2019 and supplemented the overall accommodation inventory. It is estimated that at least two-thirds of these units were unlicensed and, thus, not included in the room night indicator reporting by Tourism Nova Scotia. While licensed room nights sold on the Island showed a 1% decline in 2019, the combination of licensed and estimated unlicensed nights showed a 3.4% increase.

In a Tourism Accommodation Needs Assessment for Nova Scotia, conducted by Group ATN Consulting in 2017, it was found that “Three Cape Breton ‘destination communities’ registered high occupancy rates in the July, August and September season denoting potential capacity issues during this period.” These three communities were Inverness, Ingonish, and Chéticamp.

It was also reported that Baddeck was approaching the potential capacity issue threshold.

The growth in shared economy units on the Island, which totalled over 1,200 listings as of March 2021, has added to the accommodation capacity at all times of the year and provided accommodations in communities that previously had little inventory. Above all, these units have met a growth trend that is increasingly demanded by visitors. However, in some cases this added inventory has been taken from what was previously rental housing stock in many communities. This had exacerbated labour force shortages in some communities and resulted in some operators having to provide housing for employees or reduce their operating capacity.

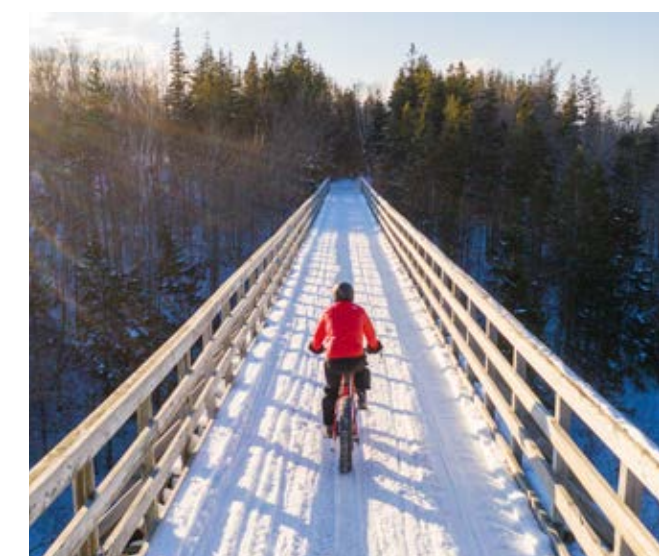
Cape Breton Island Licensed Room Nights Inventory by Month (2019)



Source: Nova Scotia Tourism Indicators

The chart shows the seasonal nature of the Cape Breton Island tourism industry with many accommodation operators, and other tourism operators, only open from May to October. There is room to grow in every month of the year, from an inventory standpoint, although this is likely hampered by workforce capacity in peak months in some communities.

It should be noted that there has been strong growth during the winter season since Destination Cape Breton launched its winter campaign in 2017. Licensed room nights in winter 2019 were 20% higher than in 2016. Just prior to the COVID-19 pandemic, shared economy unit nights in winter 2020 were 120% higher than winter 2019. Shared economy units have added to the inventory of accommodations during the winter period when many of the Island’s accommodations are closed.

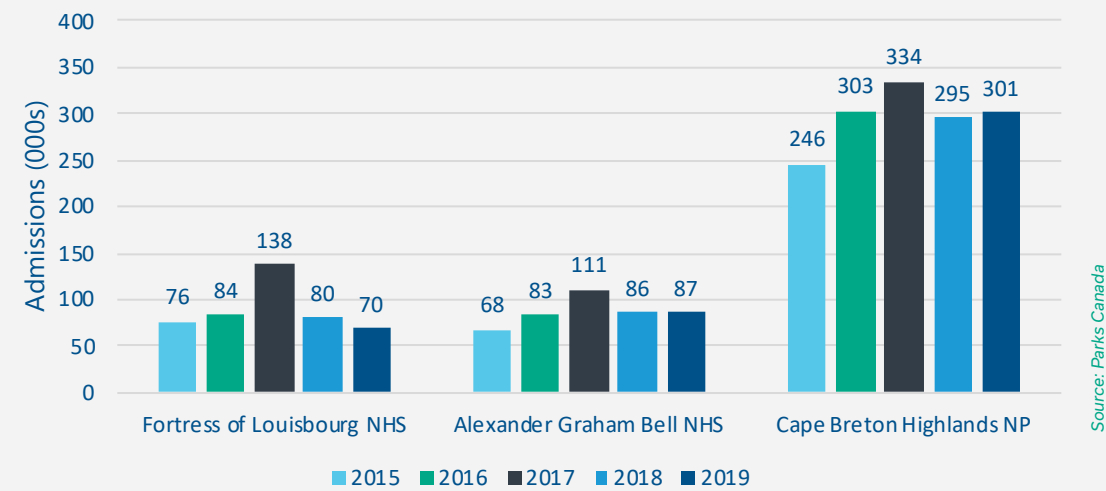




Parks Canada

Another measure of tourism performance is visitation to the Parks Canada sites on the Island, as indicated for 2015 to 2019 in the chart below.

Parks Canada Site Admissions – Cape Breton Island

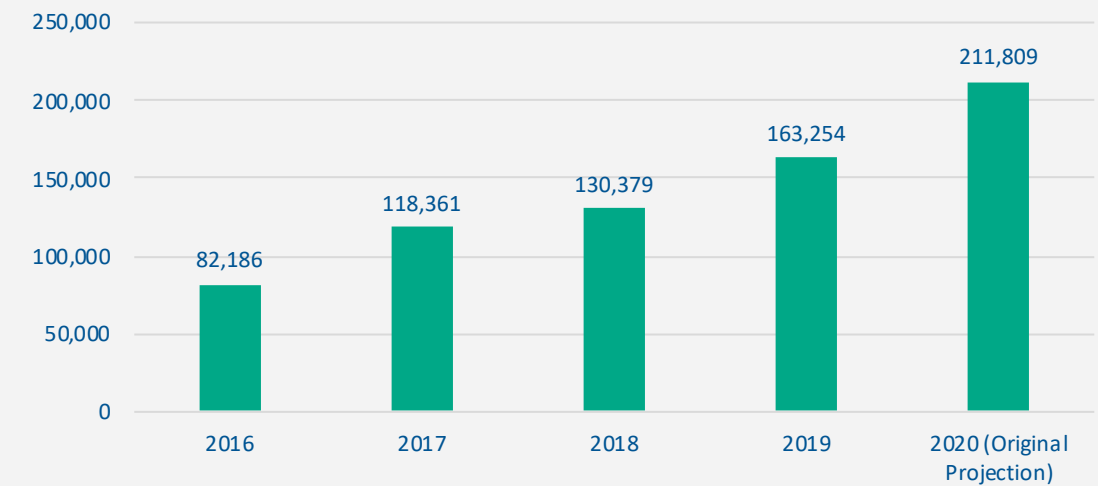


In 2017, Parks Canada had free admissions to all of its sites for the Canada 150 celebrations, so that year is an outlier. When removing that year from the trendline, there has been steady growth at the Cape Breton Highlands National Park, as well as incremental growth at the Alexander Graham Bell National Historic Site. The Fortress of Louisbourg National Historic Site, however, has declined by 12.5% in 2019 compared to 2018.

Cruise and Marine Tourism

There had been significant growth in cruise passenger traffic from 2016 to 2019, as shown in the chart below.

Port of Sydney Cruise Passengers



The number of cruise passengers visiting the Island doubled from 2016 to 2019, bringing significant incremental tourism revenues. In 2019, the economic impact of cruise to Cape Breton Island was more than \$68 million. The original projection for cruise passengers for 2020, prior to the COVID-19 pandemic, was 30% higher than 2019. This growth has now been supported by the addition of a second berth at the Port of Sydney.

Smaller ship cruise visits to niche ports around the Island have also been increasing in recent years. Louisbourg, Baddeck, and Chéticamp have been welcoming these smaller ships in the past few years and ships have also made stops in Ingonish, Inverness, Port Hood, and St. Ann's Bay.

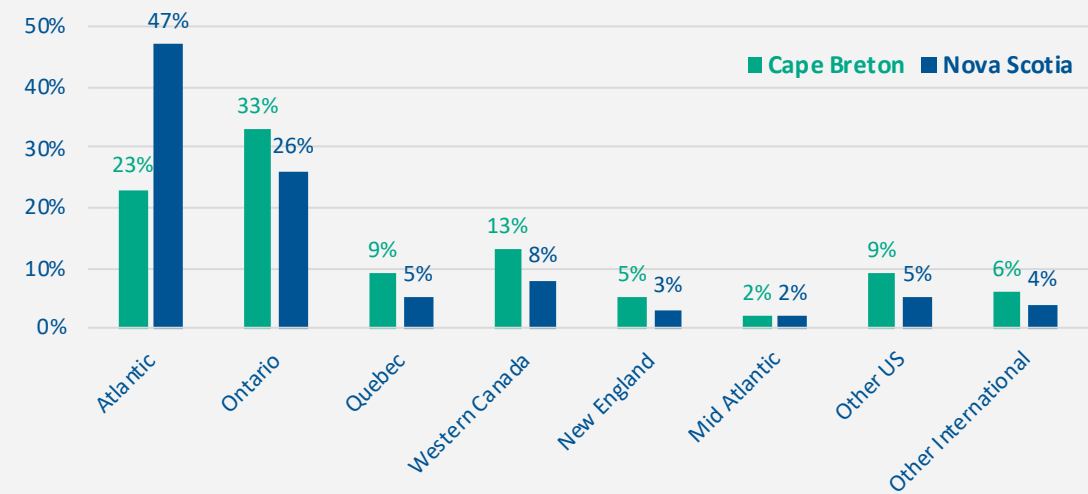
For marine tourism, the St. Peter's Canal experienced strong growth throughout the 2015-2019 period. In 2015, 828 vessels arrived via the canal and in 2019 this had grown to 1222 vessels; a 47% increase.



3.3 Visitor Profile

The visitor profile for Cape Breton Island can be described in geographic, demographic, and psychographic terms.

Visitor Origin



Source: NS Visitor Exit Survey 2017



As indicated in the chart above, 77% of Nova Scotia visitors who visit Cape Breton come from outside Atlantic Canada, as compared to 53% for Nova Scotia visitors as a whole. Ontario is the largest market, followed by Atlantic Canada, Western Canada, and Quebec. US visitors comprise 16% of the Island's visitors, compared to 10% for Nova Scotia overall.

Not surprisingly, the vast majority of the Island's visitors are pleasure travellers (74%). They stay 51% longer than the average Nova Scotia visitor (7.7 days) and they spend 72% more per travel party (\$2500).

From a demographic standpoint, there are two main segments of Island visitors:

- Empty nest couples – aged 45-70 (Boomers and Gen X) with higher than average household incomes and post-secondary education; and
- Pre-nest millennials – aged 22-35, in the early stages of their careers with disposable income and a high propensity to travel.

In psychographic terms, Destination Cape Breton utilizes the Explorer Quotient (EQ), a segmentation tool developed by Destination Canada. Destination Cape Breton began using EQ in 2011 and Tourism Nova Scotia in 2015 as their lead market segmentation tool. Using EQ has helped to identify who is most drawn to the Island's visitor experience and to tailor the marketing approach to appeal to these potential visitors.

The Island's two main EQ types are Authentic Experiencers (28% of visitors) and Cultural Explorers (16% of visitors). These EQ types are both within the Learner category of visitor. Destination Canada states:

Learners are primarily motivated to travel to broaden their horizons and explore and discover other cultures. They are avid travellers who are always looking forward to planning and taking their next trip. They feel travel is the best way to experience life and learn about different places and cultures and, even between trips, they avidly read travel articles to inspire future plans to visit new places.

Learners believe the best way to experience a culture is to interact with it as deeply as possible, exploring and spending time in local areas most tourists don't visit. They do not want to be constrained by pre-determined plans or itineraries, and are not concerned about missing popular tourist destinations, but rather discover hidden sites that only the locals would know about.

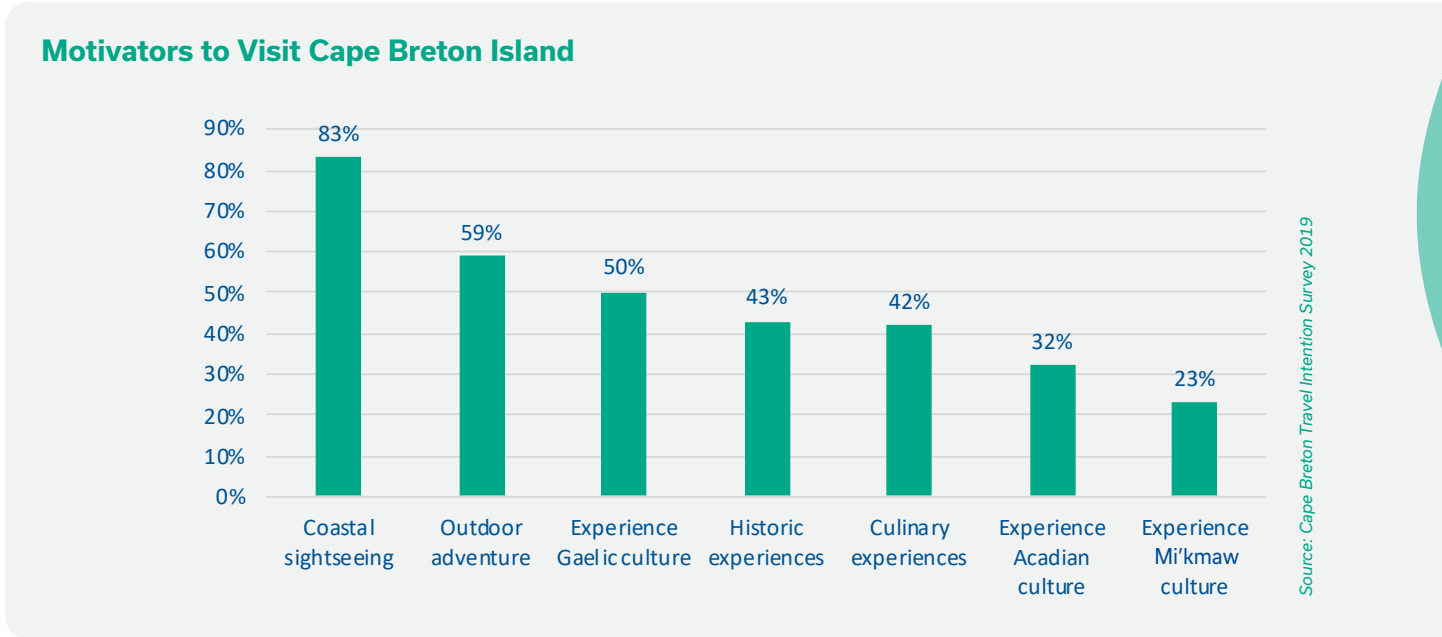
They appreciate the beauty of nature and enjoy spending time in natural settings, while also seeking to visit sites where important historical events took place. They often extensively research destinations related to these interests prior to visiting.

Tourism Nova Scotia has also been focused on developing new experiences that would appeal to the Free Spirit EQ segment through their World-Class Experience EXCELLerator Program. A handful of Cape Breton operators have gone through this program, but a critical mass of product that would appeal to this segment does not yet exist to warrant pursuing it for Destination Cape Breton. Free Spirits comprise only 8% of visitors to the Island.



3.4 Motivating Experiences

In terms of what motivates visitors to come to Cape Breton Island, the chart below provides the top seven activities.



Coastal Sightseeing

This motivator is anchored by the world famous Cabot Trail, which is the top motivator not only for visitation to Cape Breton Island but also Nova Scotia as a whole. It is considered the most scenic drive in the country and among the best in the world, consistently attracting motorcyclists, cyclists, RV's, and other road travellers.

Outdoor Adventure

The second motivator has been increasing in drawing power over the past five years, up from being cited by 54% in the 2015 Travel Intention Survey to 59% in 2019. It is anchored by the Cape Breton Highlands National Park, but most of the Island is host to outdoor adventure activities from hiking to kayaking to surfing.

Living Cultures

There is significant interest in the Island's three largest cultures – Mi'kmaq, Acadian, and Gaelic. The Island is widely known for its Gaelic culture, with events like the Celtic Colours International Festival and KitchenFest, attractions like the Highland Village and Colaisde na Gàidhlig/The Gaelic College, and music and dance at many pubs and community halls. Acadian culture is rich and features many traditional experiences like rug hooking, mask making, and dancing. Mi'kmaw cultural experiences have been growing over the past decade, as has interest in this ancient but living culture. Experiences at Eskasoni Cultural Journeys, Membertou Heritage Centre, Skye River Trail, Wagmatcook Cultural Centre, Canal Landing, Parks Canada sites, and a growing number of Indigenous businesses are building a critical mass of activities for visitors to connect and learn about the Mi'kmaw people. The Island also includes other rich cultures, including African Nova Scotian, Polish, Lebanese, Italian, Ukrainian, Chinese, Egyptian, Indian, among numerous others. All together, the cultures of Cape Breton Island provide a multicultural tapestry that enhances the destination appeal and our collective story.

Historic Experiences

With the largest historical reconstruction in North America at the Fortress of Louisbourg National Historic Site, plus the Alexander Graham Bell National Historic Site, Cape Breton Miners Museum, and other historic experiences, there is much to engage Learners with an interest in our history.

Culinary Experiences

In Cape Breton, culinary is largely focused on seafood, as our lobster has been called the finest in the world and we have other amazing seafood like snow crab, oysters, mussels, and halibut. There is a growing focus on local food and ingredients that showcase local farming with strong support

provided by the Cape Breton Food Hub. There is also an increasing number of culinary experiences that provide unique offerings to visitors, such as small farm to table restaurants and experiences like "Learn to Lobster Boil" provided by Parks Canada. Research is showing a growing interest in the craft beer and spirits offered on the Island.

Golf

While not in the top seven motivators for leisure travellers, golf is a vital niche motivator for the Island. With Cabot Cliffs, Cabot Links, and Cape Breton Highland Links all listed in *Golf Digest's* World 100 Great Courses and within the top ten courses in Canada, the Island has become the premier golf destination in Canada and among the finest in North America.

Music

While music is a key part of our living cultures, it is also an emerging motivator. Experiencing live music was cited as a planned experience by 45% of Travel Intention Survey respondents. With so many accomplished touring artists, who are the finest ambassadors for the Island, it is natural that visitors would seek music as an important component of their visit.

Marine Tourism

The Bras d'Or Lake, a UNESCO Biosphere, is considered one of the finest sailing and boating destinations in the world and is the anchor of the Island's marine tourism experience. The lake is complemented by coastal marine destinations that ring the circumference of Cape Breton.

Cruise

Sydney is one of the main ports of call in the Canada-New England cruise region and has seen significant growth over the past number of years, prior to the pandemic. Recovery and future growth will be supported by the introduction of the second berth at the port. Additionally, smaller cruise ships regularly call on niche ports like Louisbourg, Baddeck, Chéticamp, and others.

Major Events

Cape Breton Island has been growing as an event hosting destination, having hosted national events in recent years such as the Scottie's Tournament of Hearts and the Royal Legion National Youth Track and Field Championships. While the COVID-19 pandemic has resulted in many events in 2020 being cancelled or postponed, there is still a strong calendar of events over the next three years that will attract many visitors during non-peak times.



3.5 Marketing Levies

One of the primary means of funding destination marketing and management is through marketing levies, which visitors pay usually as a percentage of accommodation rates. Across Canada, it is estimated that marketing levies generate over \$400 million per year. Comparatively, this is more than four times the annual budget of Destination Canada (\$95.5 million) and constitutes a significant investment in destination marketing.

From 2012 - the first year of collection of the Cape Breton Island Marketing Levy - up to 2019, over \$6.3 million was generated for the marketing of the destination, in addition to the marketing of the Island by Tourism Nova Scotia. Over that period, 321,000 incremental room nights have been sold and the return on investment of the levy is conservatively estimated to be \$27 for every \$1 collected.

The average marketing levy rate in Canada according to a recent assessment conducted by the Destination Marketing Association of Canada is 3.43%. The table below indicates the levy rates in Atlantic Canada.

Destination	Levy Rate
St. John's	4%
Fredericton	3.5%
Moncton	3.5%
Saint John	3.5%
Charlottetown	3%
Summerside	3%
Gros Morne (self-directed)	3%
Viking Trail (self-directed)	3%
Halifax	2%
Cape Breton Island	2%
Yarmouth	\$2 per room night

As indicated, the Nova Scotia jurisdictions collecting levies are at the lowest rate in Atlantic Canada. Halifax is seeking to increase its rate to 3%.

Additional jurisdictions within the province are currently advocating for legislation that will enable them to implement marketing levies. While preliminary, it has been suggested that any new legislation should make levies applicable to Airbnb operators. A similar recommendation was made in the Cape Breton Regional Municipality Viability Study.

3.6 Destination NEXT Assessment

Destination NEXT is a destination assessment tool that has been recognized as a key process to inform overall destination strategies. The assessment tool provides:

- The determination of destination strengths and opportunities;
- The integration of industry, community, and market perspectives;
- The collection of feedback from key stakeholders (tourism industry operators, elected officials, relevant government departments and agencies, tour operators, residents, etc.); and
- The delivery of actionable data to incorporate into a destination plan.



The process contains two elements:

- 1 The Futures Study, and
- 2 The Scenario Model and Assessment Tool.

Futures Study

The Futures Study consults with industry disrupters, industry clients, community leaders, and destination leaders from around the globe to identify the major trends and strategies for destination marketing and management leaders. In the most recent edition in 2019, there were three transformational strategies identified:

Destination Stewardship

Building public-sector coalition between the visitor industry, economic development agencies, academic institutions, and civic and philanthropic organizations. The goal is to curate more immersive destination experiences, manage sustainable visitor growth, promote equitable economic development, and elevate quality of life and quality of place.

Community Alignment

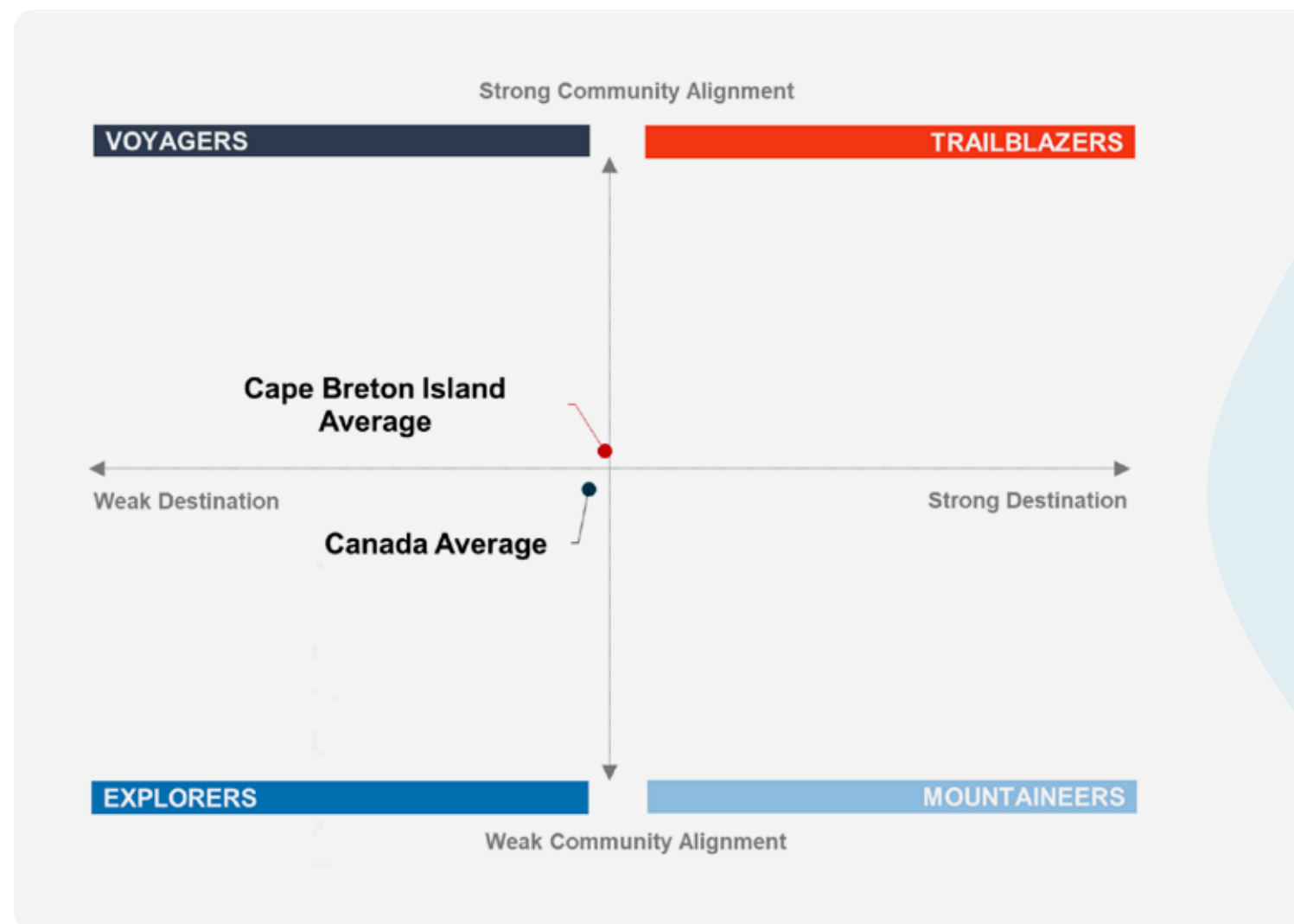
Improving resident sentiment and government support around a shared vision for the future to accelerate important destination development initiatives, protect public funding, and improve hospitality culture. The value of the visitor economy and role of destination organizations must be better understood and appreciated.

Digital Conversion

Developing more video and personalized digital strategies on mobile platforms to improve marketing effectiveness and drive higher sales in real time. Advancements in artificial intelligence, chat and other technologies are connecting industry and visitor audiences in new ways to accelerate conversion in our on-demand world.

Scenario Model and Assessment Tool

For the destination assessment, a detailed survey was sent to industry members, government leaders, community leaders, customers (tour operators, meeting planners, etc.), and the Destination Cape Breton Board of Directors and staff. The average score in terms of destination strength and community alignment is provided in the chart on the next page.



As indicated, Cape Breton Island is in the Voyagers category, but is very close to being in the Trailblazers category, the desired position. Interestingly, the destination was rated as a Trailblazer by customers.

Within Destination Strength, the following opportunities for improvement were identified:

- Promoting the development of more diverse and high-quality shopping experiences;
- Creating a year-long series of events;
- Enhancing international market readiness focused on accommodating and serving diverse languages and cultures;
- Ensuring adequate accommodation capacity in key locations;
- Enhancing domestic air access;
- Improving the high tech and innovative qualities of the destination;
- Providing better access to public WiFi;

- Improving transportation options (public transport, bikeability, directional signage) and accessibility;
- Creating more outdoor, guided tour experiences; and
- Increasing meeting space capacity and services.

Within Community Alignment, the following opportunities for improvement were identified:

- Developing a tourism master plan (essentially addressed with this strategy);
- Ensuring stable and sufficient funding for destination marketing and management; and
- Ensuring workforce stability, good relations, and education and training.

The transformational opportunities from the Futures Study and these specific opportunities from the destination assessment will be addressed in the strategy. A detailed copy of the assessment is available for download on Destination Cape Breton's industry site at destinationcapebreton.ca.



4 The Planning Context



4.1 Emerging Tourism Trends

The tourism sector is witnessing numerous emerging trends that will shape, to varying degrees, the future of the sector. With the world changing at a faster pace from technological advances, it isn't possible to predict with certainty what tourism will look like in 2030. It is also unclear what the lasting impact of COVID-19 will be on the tourism industry. However, understanding and constantly monitoring trends can provide a context for planning.



Following are a few of the key trends that may directly influence travel to Cape Breton Island.

Responsible Tourism

In the wake of overtourism in many destinations around the world from Bali to Barcelona, and witnessed to some degree on the Skyline Trail, there has been a growing trend toward responsible tourism. Many travellers are becoming more conscious of their impacts, whether environmentally, socially, culturally, or economically. A growing number of destinations are taking a stronger role in destination stewardship and are implementing strategies to mitigate any negative impacts of tourism to protect the character and way of life of their communities.

As the Visit Flanders (Belgium) report "Travel for Tomorrow" states, "Aside from prosperity, growth is now defined as better tourism, with the primary indicator being the extent to which local destinations and their residents flourish."

Generation Z

Over the past three years, Destination Cape Breton has marketed to millennials as a secondary demographic, as that generation of young adults are active travellers with disposable income. As millennials increasingly turn toward starting families, there will be an opportunity to begin targeting the next generation – Generation Z. This generation, who are just beginning to enter adulthood, has grown up surrounded by technology, particularly mobile phones and social media. They are characterized by Skift as having short attention spans, a desire for personalization, and a love-hate relationship with connectivity. They are already playing an active role in planning and paying for trips.

Professionalization of Short-Term Rentals

The inventory of short-term rentals has been growing both globally and on Cape Breton Island where there are now over 1000 listings. There has been an increasing trend of branded property management companies entering the space and bringing hotel-like standards with excellent guest communication. Marriott International recently launched a hotels and villas brand and other accommodation brand are expected to join the space. Skift Megatrends 2020 states, "Expect more convergence between hotels and short-term rentals as we move into the next decade."

Smart Tourism

According to Tourism Teacher, "smart tourism is the act of tourism agents utilizing innovative technologies and practices to enhance resource management and sustainability, while increasing overall competitiveness." One example of smart tourism is the use of technology to mitigate overtourism by monitoring and automatically communicating crowd size or line-up wait times at popular tourist attractions and suggesting alternative experiences. Big data technologies may be used to develop personalized itineraries of destinations based on a person's online persona. Augmented reality could be used to create more immersive self-guided tours.

The potential for using technology to enhance tourism is only limited by imagination. However, it is important to remember that smart tourism destinations require consistent access to Wi-Fi or mobile coverage.

Virtual Meetings

The COVID-19 pandemic has resulted in the proliferation of virtual meetings through Zoom, Microsoft Meetings, Skype, and Google Meets. With an increased commitment to sustainability, the adoption of these platforms is likely to lead to a reduction in unnecessary travel. This may have an impact on the meetings business.

Wellness Travel

As Boomers and Gen Xers age, there is a societal shift to stave off physical decline with a focus on wellness. This growing trend has entered the travel space with such experiences as yoga or mindfulness retreats. Wellness tourism is defined by the US-based non-profit Global Wellness Institute (GWI) as "travel associated with the pursuit of maintaining or enhancing one's personal well-being". Travel options typically include a combination of healthy food, fitness activities, and nature.

As reported in a *BBC Worklife* article, "from 2015 to 2017 the wellness tourism market grew from \$563bn to \$639bn, or 6.5% annually – more than twice as fast as the growth of tourism overall, according to GWI. By 2022, GWI predicts the market will reach a whopping \$919bn – representing 18% of all global tourism – with well over a billion individual wellness trips to take place around the globe." The Wellness Tourism Association states that wellness travellers tend to be higher-educated women between ages 30 and 60.

4.2 Destination Development Approaches



In addition to tourism trends, new approaches to destination development have been discussed in recent years. Following are a few of the key approaches that are most relevant to Cape Breton Island.

Destination Stewardship

According to the Global Sustainable Tourism Council, destination stewardship is “a process by which local communities, governmental agencies, NGOs, and the tourism industry take a multi-stakeholder approach to maintaining the cultural, environmental, economic, and aesthetic integrity of their country, region, or town. In other words, to ensure that the destination retains and enhances the distinctive attributes that make it attractive to beneficial tourism.”

This goes beyond responsible tourism and speaks to maintaining a balance between economic development, sustainable tourism, and the quality of life of residents. In the 2019 Destination NEXT Futures Study, destination stewardship was highlighted as a transformational opportunity for destination organizations.

For example, if there is a sharp decline in children learning to play the fiddle in the traditional Cape Breton style or an interest in learning the Gaelic language, the long-term future of cultural institutions like the Celtic Colours International Festival, the Gaelic College, the Celtic Music Interpretive Centre, KitchenFest, and many community organizations will be at risk. This, in turn, would have a negative impact on the Island’s visitor economy. Destination stewardship takes a holistic view of the entire tourism ecosystem, taking steps to ensure the immediate and long-term health of its foundational components.

The Rise of Destination Management Organizations

For over one hundred years, organizations have been formed to compel and inspire travelers to visit their destinations. These organizations became known as convention and visitor bureaus (CVB’s) and then destination marketing organizations (DMO’s). Key performance indicators for these organizations have typically been more visitors, higher hotel occupancy, and higher daily rates. In many cases, marketing was the only role performed by these organizations.

The past decade, however, has seen a shift. Tourism is now the fastest growing industry in the world, employing one in ten people. Predictions of growth before the COVID-19 pandemic had been in the 3% to 4% range annually. This growth has led to over-tourism in some destinations and the proliferation of disruptive technologies like accommodation or ride sharing platforms. As a result, DMO’s in some jurisdictions have had to shift their focus from solely marketing to managing the challenges and opportunities of tourism growth. Essentially, the ‘M’ in ‘DMO’ has changed from marketing to management.

While the transition to destination management organizations may have been born out of necessity, it has coincided with an understanding for the need for destination stewardship. In order to carefully manage and responsibly grow their destinations, destination management organizations of the future must take on a leadership role as advocate for the tourism industry, influencing key stakeholder and citizen groups, and serving as a trusted advisor to government.

The role includes working with key stakeholders to develop a vision for tourism and serve as a catalyst and collaborator to advance that vision. This may include fostering sustainable tourism development, attracting tourism investment, influencing the development of products and experiences that enhance a strong brand position, and, finally, to market the destination. In essence, a destination management organization ensures that tourism is a priority as an economic and employment generator, while carefully managing and mitigating the real and perceived challenges that tourism growth can place on a community. Never has this been more important.

Destinations International, of which Destination Cape Breton is an active member, has developed a new tourism lexicon that is based on this new reality. The lexicon states: “A destination organization is responsible for promoting a community as an attractive travel destination and enhancing its public image as a dynamic place to live and work. Through the impact of travel, they strengthen the economic position and provide opportunity for people in their community.”

Place DNA

Coined by Destination Think, Place DNA is the intrinsic character of a place. According to Destination Think, destinations that build their branding on a true community identity will be able to improve the experience and the value they bring to their stakeholders. Authentic tourism products and experiences emanate from the Place DNA as they are rooted in the intrinsic character and culture.

When considering the place brand, Place DNA sits at the centre. An authentic place brand begins with people, not marketing. Understanding the true identity of a place can only be uncovered through its residents, from the inside out. According to Frank Cuypers of Destination Think, “There can be no city branding without citizens and no destination branding without residents.”



Communities of Interest

A community of interest is a community of people who share a common interest or passion. These people exchange ideas and thoughts about the given passion but may know (or care) little about each other outside of this area. With the rise of social media, these communities have been given a platform to communicate regularly. Influencers have arisen within the community and been attributed varying degrees of credibility based on their follower size and engagement levels.

In 2018, with ACOA, Parks Canada, and Destination Canada as partners, DCB brought together a diverse group of enthusiastic local hikers who used social platforms and launched the Hiking COI. The program resulted in a 27% increase in social media conversations about “Cape Breton hiking”, a 12% increase in traffic to the Hiking page on cbisland.com, and engagement of over 107,000 in hiking influencer posts. Its success has propelled additional COI programs in Cape Breton Island and throughout Atlantic Canada.



4.3 Tourism Clusters

Harvard Business School professor Michael Porter defined clusters as “a geographically close group of interconnected companies, suppliers, service providers, and associated institutions in a particular field.” The companies and organizations work together in a way that is greater than the sum of their parts. In the visitor economy, clusters can bring together accommodation, food and beverage, entertainment, and attractions with operators and travel agencies, guides, crafts, car rentals and transport, and are supported by education and training, convention centres, consultancy, and other business services.

The Destination Canada report, *Unlocking the Potential of Canada's Visitor Economy*, highlighted the acceleration of tourism cluster development as an opportunity for growth for the country's visitor economy, particularly around nature-based attractions. It recommended “establishing conditions that induce joint public, private, and non-profit groups to align their resources toward building up regional tourism clusters.”

As an example, Montenegro, a small country on the Adriatic Sea next to Croatia, grew from being virtually unknown with 3.7 million overnight stays in 2002 to a destination drawing 12 million visitors in 2017. Tourism in the country grew because of the concentration of natural attractions around the seaside and mountains (such as the Montenegro fjord), and the country's heritage. This created a powerful tourism cluster.

The concept of tourism clusters is becoming central within the tourism development planning process and is a key component within the ACOA Tourism Innovation Action Plan. The European Union perceives cluster arrangements as the preferred form of introducing innovations in different economic fields, including tourism.

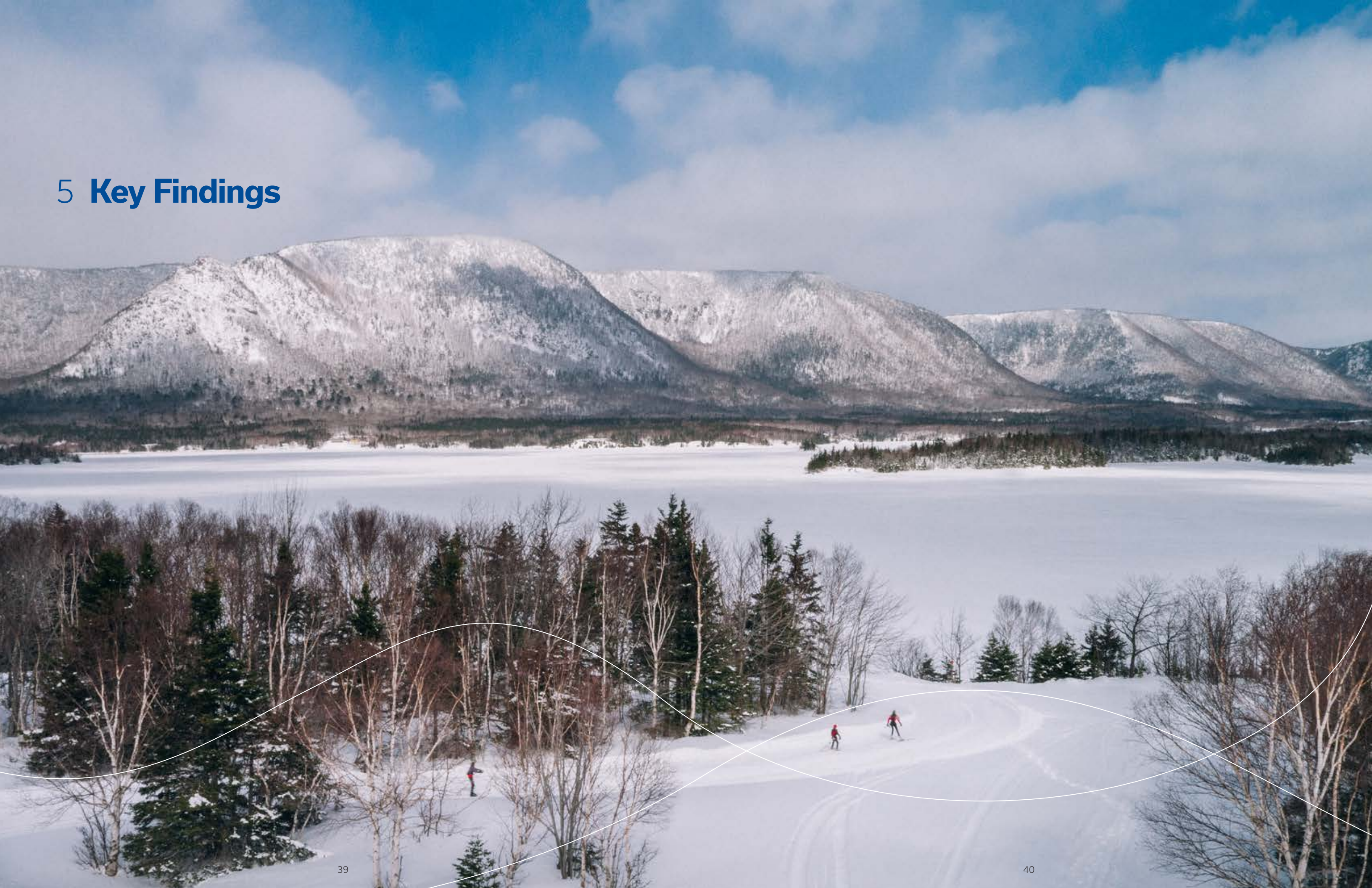
According to the Norwegian Innovative Clusters, the success of clusters is predicated on:

- Working systematically over a period of time to establish trust between partners (industry, academia, and economic development), with industry in the driving seat;
- Developing an assertive strategy that is designed to explore opportunities within the sector, within or across value chains and technologies;
- Creating collaborative meeting places; and
- Creating stimulating industry-oriented research and development projects.

With research-based innovation being a goal, the World Tourism Institute is poised to play a vital role in the establishment of tourism product clusters on Cape Breton Island.



5 Key Findings



5.1 Key Findings

From the research, assessment, and consultations conducted, following are the highlights in terms of key findings. Please note that some of these findings are more applicable to pre/post-pandemic conditions.

Visitor Economy

- The level of private sector investment on the Island has not been commensurate to the growth over the past ten years.
- According to tourism expert Roger Brooks, 70% of non-lodging tourism spending happens after 6:00pm (most of it by women) on activities such as dining, entertainment, and shopping. However, in many tourism areas around the Island, retail shops close at or before 6:00pm and there is a lack of nighttime activities.
- Many of the downtown or main street areas of tourism communities are not designed to be pedestrian friendly, which may impact the length of stay and spending in those communities.
- There is a lack of diverse and high-quality shopping opportunities in many tourism communities.
- There is a shortage of premium experiences across the Island with a growing visitor segment that is seeking such experiences.
- There is an opportunity to educate visitors on less visited areas of the Island to extend their length of stay.
- There is a need to diversify the visitor base, so the visitor economy is less reliant on leisure visitors.
- There is a lack of Cape Breton Island specific data to effectively measure the size and growth of the visitor economy on the Island.
- High tax rates are an impediment to growth.
- With a focus on staycations for the 2020 tourism season, many residents had the opportunity to reconnect with their Island and experience it through the eyes of a visitor. Their first-hand experience of the destination is an asset for marketing and enhancing the visitor experience.
- There is potential to leverage the visitor economy for technological innovation, as evidenced by Marcato, a tech firm that was founded based on a platform it had developed for Celtic Colours.

Accommodations

- There has been a growing demand for niche/boutique accommodations, such as geodesic domes.
- Some accommodations, built for a touring market that largely does not exist to the same degree, are dated and in need of an upgrade to adapt to the needs of the current visitor. There are examples of these accommodations that have been upgraded and can serve as models for others.
- There is currently a lack of 4 or 5-star accommodations on the Island.
- There has been a growth in both the demand and the number of shared economy units.
- There is a lack of regulations for shared economy units in the province compared to other jurisdictions. Halifax is currently looking to address this gap in that municipality.

Seasonality

- Over 60% of visitation occurs within a 16-week period between July 1 and mid-October, which presents business operation and sustainability challenges.
- Accommodation occupancy data indicates that there is capacity for growth in all seasons, although there have been capacity issues in Ingonish, Inverness, Chéticamp, and Baddeck during peak periods.
- There has been growth in winter tourism and more is forecast over the next ten years; however, there may be growth limitations with accommodation capacity. Many seasonal accommodations cannot open in winter as they are not currently winterized.
- There is a particular need to generate more visitation in the spring shoulder season through new experiences, meetings, festivals, and events.
- The Seasonal Tourist Business Designation that provides accommodations and campgrounds with a tax rebate if they close for at least 120 days a year is a benefit to those operators, but a disincentive to open to extend the season.

Labour, Education, and Training

- Pre-pandemic, there had been labour shortages in some communities that caused some operators to reduce operating hours or capacity. Labour shortages were exacerbated with some previous rental units converted to Airbnb's which created a rental housing shortage in some communities.

- The growth in the international student population at Cape Breton University provides an opportunity to address labour force shortages. While the daily transportation of these students in vans from the Sydney area has been vital for bringing students to available jobs, it is not an ideal long-term solution.
- Cape Breton University has a renewed focus on tourism with adjustments to the Bachelor of Tourism and Hospitality Management program, the establishment of the World Tourism Institute, the development of a van transportation program to bring CBRM-based students to tourism jobs in other areas of the Island, etc.
- There is a need for enhanced workforce education and professional development, particularly in customer service.

Culture and Heritage

- There is already a cultural tourism cluster on the Island, but it has potential to be greatly enhanced.
- There is a keen interest within the Island's culture and heritage communities in strengthening the relationship between the tourism and culture sectors, which stems from a recognition that culture and tourism share a mutually beneficial relationship. Culture is germane to and enriches the tourism experience and tourism provides a customer base that helps to sustain cultural organizations and activities.
- Cape Breton Island has three "Canadian" languages – Mi'kmaq, Acadian French, and Gaelic – other than English that are spoken every day. The Island is enriched by the cultural legacy that each of these languages offers. There is an opportunity to sustain these languages while creating unique opportunities for tourism development.
- There is a rich African Nova Scotian community in Cape Breton with a dynamic culture and compelling story that may be shared with visitors.
- Of the top experiences visitors do when visiting the Island, 12 of 19 are cultural experiences. This reflects the reality that most of the Island's visitors are classified as "Learners" in the Explorer Quotient segmentation tool.
- There has been growing interest in Mi'kmaw culture as a motivator of travel to the Island.
- Without equal parts of economic and social growth within the Island's cultural communities, they will not have the capacity to create authentic, worldly interesting arts nor sustain the languages that are so fundamental to, and have so much potential for, Cape Breton society.
- Industrialization brought immigrants from many countries around the world and immigration continues to enrich the multicultural fabric of Cape Breton Island. There is an opportunity to enhance the celebration and sharing of these cultures.
- Most of the cultural organizations, artists, producers and heritage interests are interested in generating greater awareness of their work, more on-site visitors, and greater retail sales via tourism.
- Culture organizations that are essential to the development of cultural tourism need to develop new revenue streams that support their sustainability.
- There has been declining attendance at the Fortress of Louisbourg National Historic Site in 2018 and 2019, which requires exploration and new strategies to reverse this trend.
- There is a strong and diverse collection of artisans on the Island, including a number that are nationally and internationally recognized. A great number of tourists search for works that reflect their enjoyment and interest in the Island.
- The Cape Breton Centre for Craft and Design has enhanced capacity and quality amongst creators while fostering consumer and brand awareness, thus ensuring that visitors can find the work of the Island's most highly regarded creators.
- Cape Breton Island continues to produce performing artists and songwriters who tour nationally and internationally and are the Island's finest ambassadors.
- There is a growing and dynamic theatre community that consistently produces captivating works in our quality facilities.
- Music tourism is a growth area for the Island. Currently, 45% of visitors participate in music experiences during their visit to the Island, but there is potential for music tourism to be an even greater motivator of travel to Cape Breton Island.
- There is an opportunity to develop new content for broadcast or streaming services with productions that are conceived, developed, and produced on the Island.
- There is a need for a local educational option to train individuals in management for arts and culture.



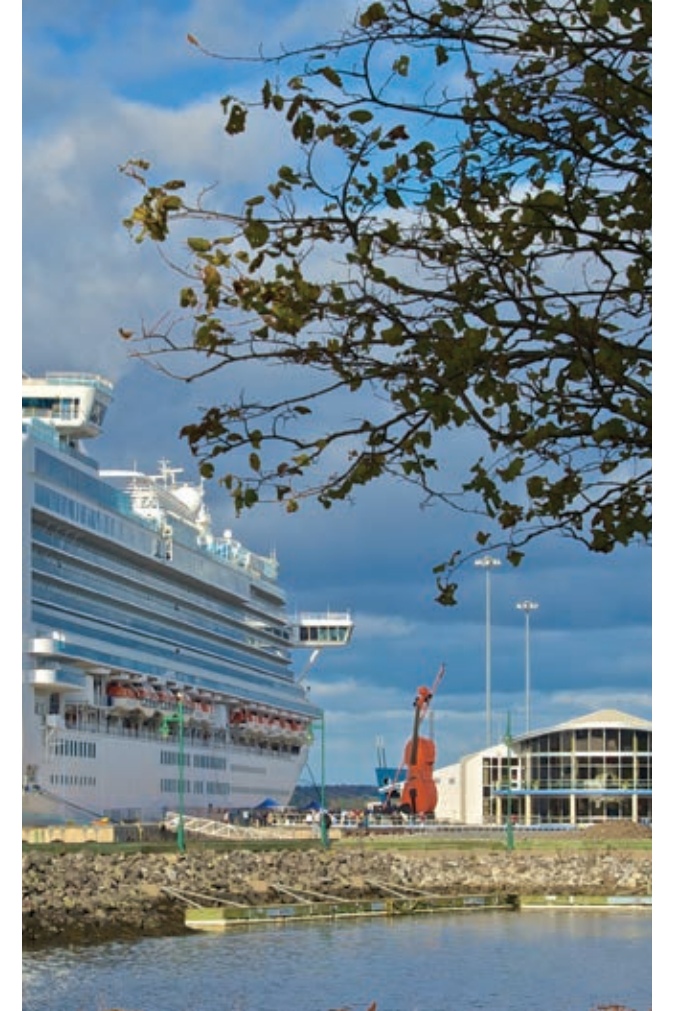
Outdoor Adventure

- There is an opportunity to create a product cluster around adventure tourism, as the Cape Breton Highlands has the potential to be a world-class adventure tourism destination.
- With the development of Ski Cape Smokey, growth in snowmobiling, potential for backcountry skiing, new investments at North Highlands Nordic, and other developments, there is a tremendous opportunity to expand the marketing of Cape Breton as a winter destination.
- The Seawall Trail project has the potential to significantly increase Cape Breton Island's viability as an adventure tourism destination and is one of a few experiences that would have international appeal. The Seawall Trail could have a sizable impact on both the Cape Breton Island adventure tourism brand and the local economy.
- The process to apply for and receive commercial use permits (business licenses) in Nova Scotia's protected wilderness areas is not as well defined as other jurisdictions and difficult to navigate. To date, commercial permits have not been encouraged and wilderness areas are not managed as an asset for economic development. This has led to uncertainty with respect to the process and confusion as to what is possible, and it will continue to discourage investment until goals, policies and regulations are defined with more clarity.
- Visitors planning a trip to the Cape Breton Highlands often overlook the Northern Highlands region when booking accommodations and experiences. This area has tremendous potential for adventure tourism development.
- Cape Breton Island has a wealth of hiking trails, but the trails are at varying degrees of readiness. Existing informal trails need to be improved with marked parking lots, appropriate trail signage, and some trail construction. Provincial trails - such as Uisge Ban Falls or Cape Smokey - require consistent, dedicated maintenance.
- There is significant potential for the development of mountain bike tourism. With the right attention to detail and development of quality infrastructure, Cape Breton can compete against destinations like Iceland and Moab, Utah for international mountain bike tourism.
- There is currently a lack of guided outdoor experiences on the Island.



Culinary

- There is an opportunity to create a product cluster around culinary tourism, with a particular emphasis on shellfish, as Cape Breton Island can make a credible claim to having the finest lobster, snow crab, oysters, and mussels in the world.
- Cape Breton Island has an artisanal culinary industry that is characterized by hands-on, traditional and/or creative practices in food harvesting, production, and preparation. Small scale, sustainable agriculture and aquaculture is practiced and celebrated.
- The Cape Breton Food Hub has grown significantly in the past few years to offer a viable supply chain of locally grown, whole, chemical-free, and free-range food and specialty products that supply restaurants and food operators that serve the touring public. The Food Hub is currently developing a new processing facility that will make local food products available year-round.
- With culinary programs offered at the Nova Scotia Community College (NSCC) campuses on the Island, and with a strong culinary component to the Bachelor of Hospitality and Tourism Management program at CBU, there is a pipeline for educating culinary professionals of the future and providing continued education.
- The culinary industry is supported by two industry associations: the Restaurant Association of Nova Scotia (RANS) and Taste of Nova Scotia. There is interest in establishing a Cape Breton chapter of RANS.
- There has been a demand trend toward restaurants and culinary experiences offering innovative and varied dishes, as visitor tastes have become more sophisticated. Over the last number of years more restaurants are entering this higher-end innovative market, with many filling reservations months in advance. This indicates that there is opportunity for more players in this market.
- There is an opportunity to develop new culturally-focused culinary experiences, such as Mi'kmaw, Acadian, Gaelic, African Nova Scotian, and other culinary experiences.



Cruise

- There is a need to create more cruise excursions or experiences that do not require bus transportation as there are capacity issues with the current inventory of buses to service cruise lines.
- The Utility and Review Board (UARB) ruling to charge premium fees for buses that are brought in from off-Island to service cruise excursions is a point of contention with cruise lines and may impact future growth.
- While the Port of Sydney scores very high for its shore excursions, the downtown experience scores lower. More support is needed to address the planning and development of Downtown Sydney.
- There has been an increase in visitation by small ship and expeditionary cruise lines to niche ports around the Island.
- Sydney has the potential to become a home port for expeditionary cruise lines that currently place most of their non-Antarctica itineraries in the European Arctic. Attracting just 10% of those ships to Atlantic Canada and the Eastern Canadian Arctic could have tremendous impact on Cape Breton's economy.
- Cruise has begun to recover on a small scale in Asia by targeting specific countries for cruise itineraries that are wholly within the country's ports. This is not possible in Canada, as the Coasting Trade Act prohibits cruise itineraries that are solely within Canadian waters.

Marine Tourism

- There had been an increase in boating traffic to the Bras d'Or Lake in recent years, pre-pandemic, with potential for more growth.
- There is an infrastructure deficiency in numerous marinas around the Island that impacts the experience for visiting boaters.
- The operating hours at the St. Peter's Canal, due to budget constraints, are deemed to be insufficient to serve the needs of visiting boaters.
- Develop Nova Scotia has been actively targeting superyachts to the province with increasing success. Preparing marinas to be superyacht-ready provides increased amenities and services that benefit all visiting and resident boaters.

Golf

- Cape Breton Island is a premier golf destination in high demand due mainly to the tremendous appeal of Cabot Cape Breton and the enduring appeal of Highlands Links.
- The loss of funding for dedicated golf marketing for the Island has had an impact on the other courses on the Island besides Cabot.

Meetings & Events

- There is potential through the creation of new events, innovation of existing events, and attraction of events to have a robust, year-round calendar of events.
- There are structural and capacity issues in meeting venues, such as limited breakout space, that limit the size and scope of meetings that may be attracted to the Island.
- There is significant competition for business meetings from other destinations within Atlantic Canada that have meeting venues with greater capacity and flexibility, plus more resources for sales activities.
- Cape Breton Island has the potential to be positioned as a premier small meetings destinations (400 people or less).



Transportation and Infrastructure

- While there has been significant investment in roads in the past few years, there are still tourist areas of the Island where roads require upgrades to ensure a positive travelling experience for visitors.
- There has been growing interest in a gateway strategy for the Island that would enhance all points of entry, including an enhanced gateway at the Canso Causeway. The strategy would ensure that visitors are provided an appealing and welcoming first impression to Cape Breton.
- Commercial air access had been increasing in recent years with direct flights to Sydney from Toronto and Montreal. This has been significantly impacted by the pandemic, but it is hoped that halted routes will return post-pandemic.
- There has been much discussion about the potential for commercial air service to the western side of the Island, as data shows that most visitors to that side of the Island, and residents, tend to use the Halifax Airport, rather than Sydney.
- In previous assessments of areas of the Island, tourism expert Roger Brooks has noted that existing signage is ineffective for wayfinding, and often substandard and poorly placed. He has noted that the proliferation of mobile signage on tourism routes is damaging to our destination's curb appeal for visitors.
- The Cabot Trail has been featured in *Lonely Planet's* Epic Bike Rides of America, but much of the trail has not been designed to accommodate cycling with wider roads or paved shoulders.
- Public transportation options have been expanded in recent years to serve rural parts of the Island.
- Ride sharing services Uber and Lyft have recently been approved to operate within the Halifax region and could be considered in parts of Cape Breton Island.
- Round Two of the Internet for Nova Scotia Initiative will deliver high speed Internet connectivity to approximately 97% of Nova Scotia homes. This should address most of the tourism focused communities in Cape Breton.

Destination Marketing and Management

- There is a growing trend for destination marketing organizations to evolve into destination management organizations.
- There is a growing trend toward destination stewardship, which ensures that delivering an exceptional visitor experience is aligned with maintaining a flourishing quality of life for residents. A sustainable tourism approach that encompasses environmental, social, cultural, and economic impacts is key to effective stewardship.
- The current funding streams for Destination Cape Breton require greater stability to effectively deliver the organization's mandate.
- The current marketing levy rate for both Cape Breton Island and Halifax trails the national average and is the lowest among competing jurisdictions in Atlantic Canada. This leaves both destinations at a competitive disadvantage in terms of resources available to compete with other regional destinations.
- There is an increasing trend toward digital transformation and conversion that must be embraced by the entire industry to improve marketing effectiveness, including developing more video and personalized digital strategies on mobile platforms and monitoring advancements in artificial intelligence, chat and other technologies. The scale and speed of this transformation has been accelerated by the COVID-19 pandemic and McKinsey has stated that five years of progress was achieved in a period of 60 days during the 2020 shutdown.
- COVID-19 has also accelerated a trend toward digital "nomads" – remote workers who can work anywhere with a strong Internet connection. Destinations such as Bermuda and the Maldives have targeted this audience to fill empty accommodations during the pandemic and Nova Scotia is developing a strategy to target this market as well.
- Currently, there are very few 5-7 day packaged tours that are market or export ready on the Island.
- Cape Breton currently lags in international market readiness and its ability to accommodate and serve diverse languages and cultures.
- There is an opportunity to develop a wellness tourism niche on the Island.

6 Strategic Direction





6.1 Values and Principles

The Strategic Direction provides a framework within which the overall strategy is delivered. This begins with a set of core values and guiding principles that will provide a foundation for the strategy.

Core Values

A set of core values will guide the development of the strategy:

Care for Community

Growth of the tourism industry must be carefully managed to ensure it enhances the quality of life for residents.

Authenticity

Cultures and traditions must be protected to retain their authenticity.

Diversity, Inclusion, and Respect

People of all backgrounds will be welcomed and respected within the industry and the visitor experience.

Creativity

Voice will be given to innovation, expression, and imagination.

Growth, Capacity and Leadership

Meaningful personal development and growth will be encouraged for those working in Cape Breton's tourism industry.

Sustainability

Practices will be developed to ensure environmental, cultural, social, and economic sustainability.

Guiding Principles

In addition to the core values, the strategy will follow these guiding principles:

Alignment

The strategy will be designed to align with Federal and Provincial tourism strategies and related strategic plans of key partners and stakeholders to ensure that the strategies are mutually reinforcing.

Motivating Experiences

The strategy will build upon the strength of Cape Breton Island's existing motivating experiences to maintain the endearing character of the destination.

Collaboration

Collaboration among industry partners and stakeholders will be the key to the successful implementation of the strategy.



6.2 Vision and Goals

The vision is a description of the optimal tourism industry in 2030, as follows:

2030 Vision

Cape Breton Island is a four-season, sustainable, and smart tourism destination that provides positive benefits and wealth creation opportunities for residents, tourism operators, stakeholder organizations and ancillary businesses, the public sector, and visitors. Through nurturing and celebrating cultural expression, authentic experiences, culinary offerings, events, and the abundance of natural beauty and outdoor adventure opportunities, the Island’s position as the #1 Island in North America is continually fortified. Education and training, research, and innovation support the development of dynamic tourism clusters that support and leverage our tourism industry’s growth.

Goals

To achieve the 2030 Vision, the following goals have been identified:

1

Cape Breton Island’s visitor economy will have fully recovered from the COVID-19 pandemic and grown by 50% over 2019.

2

Cape Breton Island will become a viable four-season destination with a minimum monthly occupancy rate of 50% and minimum monthly room nights sold of 30,000.

3

The satisfaction rate of visitors, industry, and residents will have grown annually.

4

Those working within the tourism industry or dependent upon tourism (e.g. artists, creators, language bearers, heritage and cultural interpreters, adventure guides, chefs, entrepreneurs, etc.) will have sustainable and viable opportunities to thrive and create wealth.

5

Cape Breton Island will be established as a smart destination with the industry having embraced and excelled in digital transformation and conversion.

6.3 Development Themes

The strategy is designed around the development themes, which includes six Gamechangers and six Supporting Themes.

Gamechangers

Gamechangers are the key opportunities that could see significant growth and investment in the industry, such as the development of Cabot Links or the Sydney Cruise Terminal have been in the past. The six gamechangers are:

1

The enhancement of the cultural tourism cluster to a world-class level.

2

The creation of an adventure tourism cluster, with particular emphasis in the Cape Breton Highlands.

3

The creation of a culinary tourism cluster based on seafood, local ingredients, and telling our cultural story through food.

4

The development of a robust, year-round schedule of events, based on the inherent strengths and character of the destination, through creation, innovation, and attraction.

5

The development and promotion of the Bras d’Or Lake, a UNESCO Biosphere, and coastal Cape Breton into a world-class marine tourism destination.

6

The celebration, promotion, and leveraging of the innovative spirit of Alexander Graham and Mabel Bell to create a thriving cluster of economic activity that supports and benefits from the tourism industry.

Supporting Themes

In addition to these gamechangers, there are six supporting themes that will be required to ensure to achievement of the 2030 Vision:

1

Continuing product innovation and authentic experience development.

2

Fostering sustainable tourism development.

3

Strengthening the tourism business climate.

4

Striving to achieve excellence in visitor experience delivery.

5

Attracting, retaining, and training a skilled workforce.

6

Evolving the model of Destination Cape Breton to support the growth of the industry.

The six gamechangers and six supporting themes are further detailed in the Strategic Priorities and Actions section of the strategy.



7 Strategic Objectives and Actions





7.1 Strategic Objectives and Actions

Strategic objectives and associated actions have been assigned for each of the six Gamechangers and six Supporting Themes. Each objective has a priority assigned in one or more of the following categories:

Recovery

It has been identified as a priority for the recovery of the industry from the COVID-19 pandemic.

Short-Term

It is a priority with low complexity that may be achieved in the next two-three years.

Longer-Term

It is a priority with high complexity that may require four or more years to achieve.

For each objective, lead and supporting roles have been assigned to members of the Support Network.



Gamechanger 1: The enhancement of the cultural tourism cluster to a world-class level.

Strategic Objectives and Actions	Priority
<p>1. Encourage the Island's tourism industry to adopt the United Nations Declaration on the Rights of Indigenous Peoples as a reconciliation framework and to apply its principles, norms, and standards to corporate policy and core operational activities involving Indigenous peoples and their lands and resources.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Destination Cape Breton to formally adopt the UN Declaration on the Rights of Indigenous Peoples and work with Indigenous partners to develop a program that promotes the meaningful adoption of the declaration.• Establish a formal process for on-going consultations and relationship-building with Indigenous tourism leaders and stakeholders to allow those partners to shape future plans in a meaningful way.• Work with Indigenous tourism leaders and stakeholders, educational partners, and industry operators to ensure Mi'kmaw people have equitable access to jobs, training, and education opportunities in the tourism industry.• Work with Indigenous tourism leaders/stakeholders and educational partners to develop an educational program for tourism industry operators and staff on the history and culture of the Mi'kmaw people, including the history and legacy of residential schools, the UN Declaration on the Rights of Indigenous Peoples, treaties and Indigenous rights, Mi'kmaw traditions, etc.• Ensure that all events held on the Island follow Mi'kmaw protocols.• Enhance and increase Mi'kmaw cultural content in Cape Breton Island marketing to begin to educate visitors on this rich culture and motivate them to engage in Indigenous experiences as part of their visit. <p>SUCCESS NETWORK Lead: Mi'kmaw leaders, NSITEN, DCB, CBU/WTI Support: TIANS, CCH</p>	Short-Term / Longer-Term
<p>2. Nurture the growing opportunity in Indigenous tourism.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Work with Indigenous partners to reconstitute the Unama'ki Tourism Association or a similar organization that represents the community-based Indigenous experiences and Indigenous tourism operators.• Establish an Indigenous tourism coordinator position at Destination Cape Breton to work with the Unama'ki organization.• Through membership, capitalize on the tools and programs available through the Indigenous Tourism Association of Canada (ITAC) and align with their 2020-2024 ITAC strategy that reflects pandemic recovery.• Collaboratively develop an Unama'ki Trail that will feature experiences, communities, and Indigenous programs. <p>SUCCESS NETWORK Lead: Mi'kmaw leaders, NSITEN, DCB Support: ACOA, ITAC, Parks Canada, TNS, CCH, CBU/WTI</p>	Short-Term / Longer-Term

Strategic Objectives and Actions	Priority
<p>3. Cultivate authentic cultural and heritage tourism experiences that are unique to the Island, that create opportunity for our Mi'kmaw, Acadian, Gaelic, African Nova Scotia, and other cultural communities, support year-round visitation, and support the development of healthy, sustainable communities.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Establish regular planning sessions with key stakeholders within cultural tourism to identify collaborative initiatives to pursue.Continue cultural sharing sessions among elders, historians, folklorists, and other culture bearers in the three cultures.Develop workshops, best practice missions, and training opportunities that support the development of authentic cultural tourism experiences and businesses.Promote the use of the Mi'kmaw, Acadian, and Gaelic languages in tourism content. <p>SUCCESS NETWORK Lead: DCB Support: Mi'kmaw, Acadian, Gaelic, African Nova Scotian, and other cultural community tourism stakeholders, Parks Canada, TNS, CCH, CBU</p>	Short-Term / Longer-Term
<p>4. Leverage the Island's inherent musical talents to position and promote its vast potential as a destination for music tourism.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Work with stakeholders to create a "Year of Music" celebration in 2022 that culminates with the return of the full live Celtic Colours International Festival in October 2022 and Nova Scotia Music Week in November 2022.Pursue the positioning of Cape Breton as the "Music Island" in partnership with CBMIC.Develop a Provincial Music Hall of Fame as an engaging and interactive experience in Downtown Sydney.Incorporate music into every aspect of the brand of Cape Breton Island. <p>SUCCESS NETWORK Lead: DCB, CBMIC Support: Celtic Colours, Gaelic College, CBU, NSCC, The Convent, CBP (Creative Economy), Mi'kmaw, Acadian, Gaelic, African Nova Scotian, and other cultural community tourism stakeholders, and other musicians</p>	Recovery / Longer-Term
<p>5. Foster thought leadership and educational streams within cultural tourism.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Work with CBU and NSCC to create programs or pathways for cultural tourism managerial and staff development.Develop a world-class cultural tourism conference, modelled after the successful IMPACT Sustainable Tourism Conference in Victoria, BC.Create collaborative workshops that are designed to create new experiences that infuse culture into other tourism clusters (adventure and culinary). <p>SUCCESS NETWORK Lead: CBU/WTI, DCB Support: NSCC, ACOA, CCH, TNS, CBCCD, CBP (Creative Economy), Parks Canada, Mi'kmaw, Acadian, Gaelic, African Nova Scotian, and other cultural community tourism stakeholders</p>	Longer-Term

Strategic Objectives and Actions	Priority
<p>6. Take steps to increase attendance at the Fortress of Louisbourg National Historic Site and impact visitation to the community and surrounding areas.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Establish a committee with representation from the Fortress of Louisbourg National Historic Site and Louisbourg stakeholders to explore and develop programming that can appeal to visitors as well as educators, children, and the local market.Explore further collaborations with Mi'kmaw, Acadian, Gaelic, African Nova Scotian and other cultural partners to develop multi-site experiences that would have a positive impact on other cultural experiences.Explore the development of new shoulder and winter season events.Continue steps to integrate the visitor experience with the town.Explore business opportunities within the site. <p>SUCCESS NETWORK Lead: Parks Canada Support: Fortress Louisbourg Association, Louisbourg Community Partners, DCB, ACOA, Develop NS, TNS, CBP, CBRM, Mi'kmaw, Acadian, Gaelic, African Nova Scotian, and other cultural community tourism partners</p>	Short-Term / Longer-Term
<p>7. Encourage the development of film and broadcast productions that are set and shot in Cape Breton.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Host a planning session for film and video production companies and funding agencies to promote the development of homegrown works.Encourage film and video producers to create new productions through competitions and a possible local film festival in partnership with the Atlantic Film Festival. <p>SUCCESS NETWORK Lead: CBP (REN/Creative Economy) Support: DCB, Screen NS, CCH, Atlantic Film Festival, NSCC, NSBI, Parks Canada</p>	Longer-Term
<p>8. Address sustainability and new revenue streams for cultural tourism organizations, businesses, and initiatives.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Encourage the Province of Nova Scotia to create a three-year investment program in support of new and established Island-based cultural tourism organizations, businesses, and initiatives.Conduct an assessment of revenue streams of cultural tourism organizations, businesses, and initiatives that explores potential sales opportunities, available funding programs, and innovative approaches from other jurisdictions.Leverage the Cape Breton First program and work with partners to create a one-stop, online shop for Cape Breton Island cultural products, including craft, art, music, books, gift cards for cultural experiences, etc. Actively promote the shop to residents, visitors, and expat Cape Bretoners.Work with the Cape Breton Centre for Craft and Design to encourage tourism operators with a retail component to feature local artisans and market-ready creations. <p>SUCCESS NETWORK Lead: CBP (REN/Creative Economy) Support: CBCCD, CCH, NSITEN, DCB, CBMIC</p>	Recovery / Longer-Term

Strategic Objectives and Actions	Priority
<p>9. Support the growing and dynamic theatre community to launch productions that appeal to residents and visitors alike.</p> <p>ACTIONS:</p> <ul style="list-style-type: none"> • Work with local theatre groups around the Island to create a winter or shoulder season theatre festival that features locally written and produced works, and adds much-needed evening experiences to the winter season. • Explore the potential for a signature production that would be a must-see experience in Cape Breton. <p>SUCCESS NETWORK Lead: CBP (REN/Creative Economy) Support: Theatre groups, CBU, DCB, CCH</p>	Short-Term / Longer-Term

Gamechanger 2:

The creation of an adventure tourism cluster, with particular emphasis in the Cape Breton Highlands.

Strategic Objectives and Actions	Priority
<p>1. Develop and implement a comprehensive trails strategy, including development priorities, standards, wayfinding/signage, maintenance, promotion, and environmental stewardship.</p> <p>ACTIONS:</p> <ul style="list-style-type: none"> • Establish a trails committee to guide the project. • Develop a scope of work for the strategy and secure a qualified contractor to develop the strategy. • Invest in upgrades to key Provincial trails to bring them back to a high-quality standard, with an on-going maintenance budget and plan. • Set priorities and implement the strategy. • Develop a trail pass that would be sold to users of community-based trails outside of the Parks Canada or Provincial Parks to support the on-going maintenance of those trails. <p>SUCCESS NETWORK Lead: DCB, Municipalities Support: First Nations, Trail Groups, Hike NS, Seawall Trail Society, NS Parks, SANS, ATV clubs, CBP, ACOA, NS Lands and Forestry, NS Environment and Climate Change</p>	Short-Term / Longer-Term
<p>2. Prioritize the development of new or underdeveloped destination hiking trails.</p> <p>ACTIONS:</p> <ul style="list-style-type: none"> • Secure support to build the Seawall Trail. • Explore the potential for a multi-day hiking experience in the National Park that complements (and does not directly compete with) the Seawall Trail. • Assess and prioritize the development of trails with breathtaking views, such as the Kauzmann Trail, Tenerife, Wilkie’s Sugarloaf, Blueberry Mountain, Money Point, Robert’s Mountain, Montagne Noire, Jerome Mountain, and Squirrel Mountain, among others. <p>SUCCESS NETWORK Lead: DCB Support: Municipalities, First Nations, Parks Canada, ACOA, TNS, Develop NS, trail groups, Hike NS, Seawall Trail Society, NS Lands and Forestry, NS Environment and Climate Change</p>	Short-Term / Longer-Term
<p>3. Establish clear commercial usage policies and procedures for Protected Wilderness Areas and communicate existing commercial usage policies and procedures in Cape Breton Highlands National Park.</p> <p>ACTIONS:</p> <ul style="list-style-type: none"> • Develop and communicate clear commercial usage policies and procedures for Nova Scotia’s Protected Wilderness Areas. • Develop a communication plan to promote commercial usage opportunities within the National Park. <p>SUCCESS NETWORK Lead: NS Environment and Climate Change, Parks Canada Support: Develop NS, CBP, DCB, NS Lands and Forestry</p>	Recovery

Strategic Objectives and Actions	Priority
<p>4. Take the next steps in the development of the winter tourism season.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Implement a winter readiness program for operators.• Work with winter experience providers to enhance offerings, develop winter packages, and take the product to market.• Increase the capacity of the snowmobile market with increased rental opportunities, more drive-up accommodation and food options, and a snowmobile festival.• Work with Parks Canada to expand the winter season offering within the Cape Breton Highlands National Park.• Explore and develop plans for niche market opportunities, such as backcountry ski touring, fat biking, and ice fishing. <p>SUCCESS NETWORK Lead: DCB Support: Municipalities, First Nations, Parks Canada, SANS, CBP, ACOA, winter operators</p>	Recovery / Longer-Term
<p>5. Develop a mountain biking market for Cape Breton Island.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Follow a clustering approach to develop new trail systems in strategic areas of the Island that will hold the greatest appeal to mountain bikers.• Develop or attract biking professionals – ride guides, skills coaches, trail designers and builders, bike service and rentals, etc.• Develop a signature mountain biking event that will attract riders.• Explore opportunities to provide fat bike rentals in strategic locations. <p>SUCCESS NETWORK Lead: CBP, DCB Support: Municipalities, ACOA, Cape Smokey</p>	Recovery / Longer-Term
<p>6. Explore the development of an adventure centre in the Northern Highlands as an anchor for adventure tourism.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Explore the Restigouche River Experience Centre, Charlo Aventuriers Outdoor Centre, and similar centres as potential models.• Develop a business model and plan for the adventure centre and secure financing. <p>SUCCESS NETWORK Lead: Victoria County (with local community) Support: DCB, CBP, CBU, NSCC, Industry</p>	Longer-Term

Strategic Objectives and Actions	Priority
<p>7. Explore the potential for hunting and fishing tourism experiences as potential economic generators in shoulder seasons.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Develop a business case for the opening of the moose hunt in the North Highlands to non-residents and, if feasible, advocate for its development.• Develop an assessment of the market potential of recreational fishing as a tourism motivator. <p>SUCCESS NETWORK Lead: DCB, CEPI Support: Municipalities, First Nations, NS Lands and Forestry, Parks Canada, Industry</p>	Short-Term / Longer-Term
<p>8. Create programs or pathways for Adventure Tourism managerial and staff education and development.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Explore partnership opportunities with Thompson Rivers University to utilize their established curriculum in this field.• Implement the program stream and adjust as needed to meet market trends.• Facilitate immigration for international graduates in this area. <p>SUCCESS NETWORK Lead: CBU, NSCC Support: DCB, Parks Canada, adventure operators, CBP</p>	Short-Term / Longer-Term

Gamechanger 3:
The creation of a culinary tourism cluster based on seafood, local products, and telling our cultural story through food.

Strategic Objectives and Actions	Priority
<p>1. Enhance the culinary experience at Island restaurants.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Continue the roll-out of the culinary advanced market readiness (AMR) project to reach a critical mass of restaurants around the Island.Based on the results of the AMR project, develop educational and training programs to address industry needs.Provide workshops to educate restaurants on adding local seafood and other local products and ingredients to their menus.Encourage more restaurants to become members of the Cape Breton Food Hub.Plan best practice missions to top seafood culinary destinations. <p>SUCCESS NETWORK Lead: CB Food Hub, NSCC Support: DCB, CBU, ACOA, RANS</p>	Short-Term
<p>2. Create a signature seafood-focused culinary festival that coincides with the lobster season.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Work with partners to envision and scope the event.Move the Lobster-licious event that was launched in 2020 to earlier in the season to coincide with the new festival.Explore potential for a coinciding seafood industry conference that could bring in buyers and chefs from around the world. <p>SUCCESS NETWORK Lead: DCB Support: RANS, CB Food Hub, NSCC, CBU, culinary operators, seafood industry, Municipalities, First Nations, TNS, ACOA</p>	Short-Term / Longer-Term
<p>3. Create new culinary-themed experiences based on seafood and local food.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Host culinary experience development workshops and competitions.Encourage and support culinary operators and/or chefs to attend the GMIST Edge of the Wedge experiential training program.Encourage culinary operators to participate in the World-Class Experience EXCELLerator program.Bring together Mi'kmaw, Acadian, and Gaelic cultural groups and culinary operators to create new culinary-focused culinary experiences.Develop culinary tours and enhance the promotion of Cape Breton portions of themed culinary trails. <p>SUCCESS NETWORK Lead: DCB Support: TNS, NSCC, CBU, RANS, ACOA, Mi'kmaw, Acadian, Gaelic, African Nova Scotian, and other cultural community tourism stakeholders</p>	Short-Term / Longer-Term

Strategic Objectives and Actions	Priority
<p>4. Foster thought leadership and educational streams within culinary tourism.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">Explore opportunities to educate chefs from Cape Breton and around the world on seafood cuisine featuring lobster, snow crab, Mabou oysters, St. Ann's Bay mussels, etc.Develop a culinary tourism conference that is designed to inspire and educate the local culinary industry to continually elevate their offerings.Create a Cape Breton chapter of RANS to support on-going initiatives.Enhance education on local foods, seafood, and cultural story telling through food at NSCC, CBU, and Memorial High School culinary programs. <p>SUCCESS NETWORK Lead: NSCC, CBU Support: RANS, TNS, seafood industry, DCB</p>	Longer-Term

Gamechanger 4:
The development of a robust, year-round schedule of events, based on the inherent strengths and character of the destination, through creation, innovation, and attraction.

Strategic Objectives and Actions	Priority
<p>1. Evolve the Events Cape Breton model to focus on event creation, innovation, and attraction.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Develop a new model for the initiative that reflects this new focus.• Develop a partnership program that secures investment from key stakeholders for the operation of the new model.• Update the venue and local organization capacity inventory for event hosting.• Develop event development/attraction strategy in alignment with the NS Events Strategy and based on venue inventory, local organizational capacity, financial resources, and local priorities.• Enhance marketing, sales, and bidding tools for the new model.• Develop/review event policy framework for consideration of municipal units and other agencies regarding event supports and parameters.• Implement economic impact forecast platform as a decision-making tool. <p>SUCCESS NETWORK Lead: DCB Support: Municipalities, Membertou First Nation, CBU, Events NS, CBP, Parks Canada, NSCC, event stakeholders</p>	Recovery / Short-Term
<p>2. Develop sustainable funding to support event creation, innovation, and attraction.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Create a season extension fund that supports event development and other initiatives that build the shoulder and winter seasons.• Work with CBRM to create a dedicated fund for event hosting. <p>SUCCESS NETWORK Lead: DCB Support: Municipalities, First Nations, Events NS, Province of NS</p>	Short-Term
<p>3. Enhance meetings and events facilities to best position the Island as a premier small and mid-sized event destination.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Update event venue Inventory including accommodations, conference facilities, social function rooms, field of play, performance spaces, etc.• Conduct a venue assessment and gap analysis.• Develop a capital scope of work for addressing infrastructure gaps to host national or international events. <p>SUCCESS NETWORK Lead: Event Venues, DCB Support: Municipalities, First Nations, ACOA, CCH, Events NS</p>	Short-Term / Longer-Term

Gamechanger 5:
The development and promotion of the Bras d’Or Lake, a UNESCO Biosphere, and coastal Cape Breton as a world-class marine tourism destination.

Strategic Objectives and Actions	Priority
<p>1. Develop a marine tourism development plan to service recreational boaters from regional smaller craft to superyachts to kayakers.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Conduct an assessment of marine infrastructure and market-readiness at ports, marinas, and anchorages around the Island that host recreational boaters.• Explore the possibility of working with a local organization, such as the Canal Landing operators, that can work with Parks Canada to expand the operations of the St. Peter’s Canal.• Explore the development of sustainable marine experiences for the Bras d’Or Lake that take into account the special ecology of the Biosphere.• Develop a project scope and priorities to address infrastructure and market-readiness needs. <p>SUCCESS NETWORK Lead: Develop NS Support: DCB, Parks Canada, marinas and yacht clubs, charter operators, CBP, Bras d’Or Lake Biosphere Reserve Association, CEPI</p>	Short-Term / Longer-Term
<p>2. Enhance the product offering to marine tourism visitors.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Conduct an assessment of marine tourism events (e.g. Regatta Week) to identify opportunities to enhance those events or develop complementary events.• Explore the expansion of charter options for boaters who do not wish to bring their own vessels. <p>SUCCESS NETWORK Lead: DCB Support: Develop NS, CBP, marinas and yacht clubs, charter operators, Bras d’Or Lake Biosphere Reserve Association, CEPI</p>	Short-Term
<p>3. Develop plans to market the marine tourism experience.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Work with local partners to review and update charts, boating information, and other content that is needed by visiting boaters.• Implement a communities of interest marketing approach for the boating niche that identifies local advocates and boating influencers who may be utilized in the effort.• Work with Develop NS to target the superyacht and luxury vessel market. <p>SUCCESS NETWORK Lead: DCB Support: Develop NS, marinas and yacht clubs, charter operators, boating community, Bras d’Or Lake Biosphere Reserve Association, CEPI</p>	Recovery / Short-Term

Gamechanger 6:
The celebration, promotion, and leveraging of the innovative spirit of Alexander Graham and Mabel Bell to create a thriving cluster of economic activity that supports and benefits from the tourism industry.

Strategic Objectives and Actions	Priority
1. Align with the Alexander Graham Bell Foundation and its strategy to explore partnership opportunities. ACTIONS: <ul style="list-style-type: none">Establish a relationship with the AGBF Executive, Parks Canada, and Cape Breton University to understand and explore the relationship that exists among them as it relates to Bell.Establish a plan that can look to collectively promoting Bell in the upcoming centennial dates in 2022 and 2023 with the 100 year passing of Mabel and Alexander Graham Bell.Explore and celebrate the amazing career and achievements of Mabel Bell. SUCCESS NETWORK Lead: Parks Canada Support: AGBF, CBU, DCB	Short-Term / Longer-Term
2. Be a catalyst in innovation and entrepreneurialism in tourism. ACTIONS: <ul style="list-style-type: none">Formalize the innovation committee that has already been established by DCB and partners to foster and guide innovation both within and in support of the tourism industry.Utilize the innovation committee to monitor innovation opportunities in areas such as AI, big data, smart tourism, etc.Work with the local innovation community to adapt the successful MT Lab model in Montreal to Cape Breton, which identifies industry pain points and seeks innovative solutions to address them.Continue to offer tourism start-up and experience competitions on an ongoing basis. SUCCESS NETWORK Lead: DCB Support: Innovacorp, CBU/WTI, NSCC, CBP, Navigate Startup House, ACOA	Short-Term / Longer-Term
3. Cultivate innovation and thought leadership at the World Tourism Institute. ACTIONS: <ul style="list-style-type: none">Launch an international tourism conference with a focus on smart tourism.Encourage applied and scholarly research on technology for the tourism sector. SUCCESS NETWORK Lead: CBU/WTI Support: Bell Foundation, DCB, CBP	Short-Term / Longer-Term

Strategic Objectives and Actions	Priority
4. Develop a digital transformation and conversion program for tourism operators. ACTIONS: <ul style="list-style-type: none">Conduct an assessment of web presences of operators to identify the current state and common areas to be addressed.Develop and deliver the digital transformation and conversion program. SUCCESS NETWORK Lead: CBP/DCB Support: ACOA, TIANs, TNS, operators	Recovery

Supporting Theme 1:
Continuing product innovation and authentic experience development.

Strategic Objectives and Actions	Priority
1. Enhance our coastal sightseeing experiences. ACTIONS: <ul style="list-style-type: none">Address road work needs for areas of the Cabot Trail that have not yet been upgraded.Identify road work needs for other scenic drives and high traffic tourist areas.Ensure adequate numbers of well-maintained and public washrooms are available for visitor use.Develop plans for enhancing cycling routes on the Island, with the potential for paved shoulders and dedicated pathways.Re-launch the successful Viewscapes program for the Cabot Trail and the other coastal sightseeing areas of the Island. SUCCESS NETWORK Lead: Municipalities Support: NS TAT, Parks Canada, DCB	Recovery / Longer-Term
2. Explore the development of wellness tourism on the Island. ACTIONS: <ul style="list-style-type: none">Conduct a product and market assessment of wellness tourism.Develop and implement a plan to enhance and market the wellness offering. SUCCESS NETWORK Lead: DCB Support: Wellness experience providers	Short-Term
3. Foster on-going experience development. ACTIONS: <ul style="list-style-type: none">Enhance industry education in value-added experience development initiatives, such as workshops, cultural learning opportunities, experience start-up competitions, and best practice missions that result in innovative new concepts that add to the offerings on the Island.Facilitate the creation and innovation of new shore excursions, particularly those that do not require bus transportation, to support the growth of the cruise business in Sydney and in niche ports. SUCCESS NETWORK Lead: DCB Support: TNS, Parks Canada, Industry, Innovacorp, CBU/WTI, NSCC, shore excursion providers	Short-Term / Longer-Term

Strategic Objectives and Actions	Priority
4. Re-launch the Golf Cape Breton brand. ACTIONS: <ul style="list-style-type: none">Explore the potential for re-launching the brand under the umbrella of a reimagined Golf Nova Scotia.Obtain buy-in for the concept with key stakeholders and secure funding.Establish a new golf concierge and receptive tour operation.Explore product innovation opportunities, such as Heli-golfing experiences. SUCCESS NETWORK Lead: Golf CB partners, DCB Support: Golf NS	Short-Term

Supporting Theme 2:
Fostering sustainable tourism development.

Strategic Objectives and Actions	Priority
<p>1. Develop a dispersal strategy to move visitors to all tourism areas of the Island.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Work with communities with lower volumes of visitors to create new experiences and motivators to visit.• Create content to promote these areas, such as top things to do and itineraries that may be promoted in blogs, videos, and social posts.• Bring influencers and travel media to communities with lower volumes of visitors to create awareness of hidden gems.• Explore smart tourism technologies that can suggest where visitors can travel to on the Island to avoid crowds. <p>SUCCESS NETWORK Lead: DCB Support: Municipalities, First Nations, Parks Canada, industry</p>	Recovery / Short-Term
<p>2. Become certified as a Green Destination by the Global Sustainable Tourism Council, or similar certification.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Promote the education of sustainable practices and standards throughout the industry.• Encourage certification among operators.• Promote sustainable practices to visitors.• Bring a Cape Breton delegation to the IMPACT Sustainability Travel & Tourism Conference.• Explore hosting an IMPACT conference, or similar, in Cape Breton so more industry members may attend. <p>SUCCESS NETWORK Lead: DCB Support: CBU, WTI, NSCC, TIANs, ACOA, Municipalities, First Nations, Parks Canada, industry</p>	Short-Term / Longer-Term
<p>3. Develop an adaptation plan for climate change.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Work with partners to develop the scope for an adaptation plan and secure experts to develop it.• Promote the recommendations that emanate from the adaptation plan to lead to implementation and preparedness. <p>SUCCESS NETWORK Lead: CBU, Verschuren Centre Support: DCB, Parks Canada, NS Environment and Climate Change, Federal Environment</p>	Longer-Term

Strategic Objectives and Actions	Priority
<p>4. Launch an Island-wide clean-up and “first impressions/curb appeal” initiative.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Develop a plan to coordinate current municipal clean-up events into an Island-wide event with an expanded scope that motivates residents, tourism operators, and employees to participate.• Conceptualize and develop a plan for an initiative that enhances the first impressions and curb appeal of the destination, particularly in areas frequented by visitors. <p>SUCCESS NETWORK Lead: Municipalities, First Nations Support: DCB, Parks Canada, Develop NS, CBP</p>	Short/Longer-Term

Supporting Theme 3:
Strengthening the tourism business climate.

Strategic Objectives and Actions	Priority
1. Become a viable four-season destination. ACTIONS: <ul style="list-style-type: none">• Focus new event development and event attraction efforts on the shoulder and winter seasons.• Advocate for a more robust winter offering in the Cape Breton Highlands National Park and the extension of the full animation period at the Fortress of Louisbourg National Historic Site.• Create a pilot project in Cape Breton that explores alternatives to the Seasonal Tourist Business Designation as a means of providing a tax incentive to operators who open for the winter season.• Work with funding partners to develop a program to support the winterization of accommodations who wish to open for the winter season.• Advocate for the ongoing promotion of winter tourism through Tourism Nova Scotia. SUCCESS NETWORK Lead: DCB Support: TNS, ACOA, Parks Canada, TIANS, CBP, Industry	Short-Term / Longer-Term
2. Develop placemaking plans in key tourism centres around the Island to create a critical mass of retail, dining, and entertainment offerings in pedestrian-friendly areas that enhance the evening economy. ACTIONS: <ul style="list-style-type: none">• Advocate for the prioritization of the Downtown Sydney Urban Core Plan to address the concerns of the downtown experience for cruise passengers, while also improving the experience for residents and other visitors.• Prioritize tourism communities for placemaking and implementation plans. SUCCESS NETWORK Lead: Develop NS Support: Municipalities, ACOA, DCB, CBP, community development organizations	Short-Term / Longer-Term

Strategic Objectives and Actions	Priority
3. Enhance transportation to and within the destination. ACTIONS: <ul style="list-style-type: none">• Establish a transportation working committee to guide enhancement efforts.• Work with partners to rebuild demand for air routes to the Island and, where feasible for carriers, make the case for additional air access beyond pre-pandemic levels.• Develop a plan for an integrated transportation system that includes an analysis of existing and potential options for the destination (public transportation, helicopter services, taxis, ride sharing, shuttle services, buses, etc.).• Explore options to address the current bus shortage for peak cruise periods to alleviate the premium fees for bringing buses from off-Island. SUCCESS NETWORK Lead: Transportation Working Committee Support: Municipalities, First Nations, NS TAT, airports, Port of Sydney, CBP, Chambers of Commerce, DCB	Short-Term / Longer-Term
4. Support the safe return of cruise ships to Cape Breton. ACTIONS: <ul style="list-style-type: none">• Support the Atlantic Canada Cruise Association in communications efforts to rebuild confidence in cruise travel.• Develop safe post-COVID protocols for the Port of Sydney and niche ports. SUCCESS NETWORK Lead: Port of Sydney, ACCA Support: Municipalities, DCB	Recovery
5. Implement regulations for short-term rentals that level the playing field for accommodations. ACTIONS: <ul style="list-style-type: none">• Explore best practices of municipal regulations being put in place in other jurisdictions.• Develop consistent regulations for Cape Breton's five municipalities. SUCCESS NETWORK Lead: Municipalities Support: Province of NS, TIANS, DCB	Short-Term / Longer-Term
6. Initiate investment attraction for the tourism industry. ACTIONS: <ul style="list-style-type: none">• Identify investment opportunities and develop business cases for attraction.• Implement investment attraction plans. SUCCESS NETWORK Lead: NSBI Support: CBP, ACOA, Municipalities, First Nations, DCB	Short-Term / Longer-Term

Supporting Theme 4:
Striving to achieve excellence in visitor experience delivery.

Strategic Objectives and Actions	Priority
<p>1. Implement a gateway strategy that enhances the gateways to the Island at the various points of entry by road, sea, or air.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Develop plans for an enhanced gateway at the Canso Causeway that complements the redevelopment of the rotary at Port Hastings. This would include a reimagined, reinvigorated visitor information centre at Port Hastings, open year-round.• Increase visitor servicing, where needed, at ports and airports. This would include visitor servicing kiosks with part-time staffing.• Develop welcoming themes at each port of entry that are consistent with the Cape Breton Island brand. The cultures of the Island should be at the forefront in all theming. <p>SUCCESS NETWORK Lead: Municipalities Support: JA Douglas McCurdy Sydney Airport, Allan J. MacEachen Port Hawkesbury Airport, Port of Sydney, Marine Atlantic, NS TAT, TNS, CBP, DCB, Mi'kmaw, Acadian, Gaelic, African Nova Scotian, and other cultural tourism stakeholders</p>	Short-Term / Longer-Term
<p>2. Foster a culture of service excellence among the industry and Island residents.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Develop and deliver customer service training programs to front-line staff at tourism operations and ancillary businesses.• Work with partners to develop a culture and history immersion program for international students and other newcomers, who may be interested in working in tourism.• Develop a resident ambassador program that is an adaptation of the SuperHost program. <p>SUCCESS NETWORK Lead: CBU/WTI Support: Tourism HR, NSCC, DCB, CBP</p>	Short-Term / Longer-Term
<p>3. Develop and implement an industry-wide booking system and concierge service.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Identify a service provider that could implement a system and concierge service.• Integrate the booking engine into visitcapebreton.com and promote mobile booking.• Implement the service at visitor information centres and hotel concierge services to promote commission-based sales of experiences. <p>SUCCESS NETWORK Lead: DCB Support: Visitor information centres, accommodations, experience providers</p>	Recovery

Strategic Objectives and Actions	Priority
<p>4. Elevate the quality of the accommodation inventory across the Island.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Work with funders to explore funding options for accommodation renovations and upgrades.• Conduct architectural research into reimagining older accommodations that were designed for the touring market.• Encourage new investments to focus on quality accommodations based on market demands. <p>SUCCESS NETWORK Lead: DCB Support: ACOA, CBP, accommodations</p>	Longer-Term
<p>5. Develop a signage strategy for the Island.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Explore best practices for signage programs in other destinations.• Develop a consistent signage strategy for Cape Breton's five municipalities and five First Nations. <p>SUCCESS NETWORK Lead: Municipalities/First Nations Support: NS TAT, DCB</p>	Longer-Term
<p>6. Improve the Island's international market readiness.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Develop a plan to address international market readiness, including the engagement of the international student population.• Roll out industry training for international market readiness. <p>SUCCESS NETWORK Lead: DCB Support: TNS, ACOA, DC, CBU, Parks Canada</p>	Recovery
<p>7. Improve and expand the accessibility of the destination to persons with disabilities.</p> <p>ACTIONS:</p> <ul style="list-style-type: none">• Conduct a comprehensive assessment of the readiness of the destination to serve visitors with disabilities.• Develop and deliver an Island-wide program to expand and enhance the accessibility of the destination. <p>SUCCESS NETWORK Lead: Municipalities/First Nations Support: ACOA, NS CCH, accessibility groups, DCB, Parks Canada, operators</p>	Short-Term / Longer-Term

Supporting Theme 5:
Attracting, retaining, and training a skilled workforce.

Strategic Objectives and Actions	Priority
1. Develop a recruitment strategy for tourism industry employees. ACTIONS: <ul style="list-style-type: none">Promote working holidays in Cape Breton.Promote moving to Cape Breton to visitors to the Island, particularly “digital nomads” who could work anywhere but are seeking quality of life.Promote tourism employment opportunities within immigration programs for the Island.Create a link on the working holidays page that highlights tourism listings on the Cape Breton Job Board. SUCCESS NETWORK Lead: CBP, DCB Support: CBU, New Dawn, NS Immigration and Polulation Growth, TNS	Recovery
2. Promote education and professional certifications for the tourism industry. ACTIONS: <ul style="list-style-type: none">Continue to enhance the Bachelor of Hospitality and Tourism Management program at Cape Breton University to explore new opportunities, such as eMerit integration, increased focus on the IHG Academy designation, and new study streams that will be sought by the evolving local industry such as cultural tourism or outdoor adventure.Enhance continuing education and professional certification for industry operators and employees.Work with Mi’kmaw partners to explore customized Indigenous tourism training through Cape Breton University.Identify training gaps or needs and develop new programs with flexible delivery options.Encourage the Island’s education centres to develop tourism-related electives within the school system. SUCCESS NETWORK Lead: CBU, NSCC Support: TIANS/NSTHRC, Tourism HR Canada, First Nations, school system, DCB	Short-Term / Longer-Term
3. Address the tourism workforce housing shortage in rural communities, particularly Ingonish, Baddeck, Inverness, and Chéticamp. ACTIONS: <ul style="list-style-type: none">Develop a pilot project in one community to explore housing models.Implement housing initiatives in key communities where shortages exist. SUCCESS NETWORK Lead: Municipalities Support: DCB, CBU, CBP, Parks Canada	Short-Term

Supporting Theme 6:
Evolve the model of Destination Cape Breton to support the growth of the industry.

Strategic Objectives and Actions	Priority
1. Evolve the model and mandate of Destination Cape Breton to move from a destination marketing organization to a destination management and marketing organization, with an emphasis on destination stewardship. ACTIONS: <ul style="list-style-type: none">Secure support for the evolution from stakeholders. Change organization by-laws to reflect the change.Adjust the organization structure to reflect the evolved mandate. SUCCESS NETWORK Lead: DCB Support: ACOA, Municipalities	Recovery
2. Explore new sources of revenue for Destination Cape Breton to support its evolved mandate. ACTIONS: <ul style="list-style-type: none">Commission a study to compare revenue sources at Destination Cape Breton to destination organizations in other jurisdictions to explore best practices.Prioritize and implement recommendations from the study. SUCCESS NETWORK Lead: DCB Support: Municipalities, Province of NS, industry	Recovery / Short-Term

8 Measuring and Reporting Progress





8.1 Measuring and Reporting Procedures

Measuring Progress

To measure progress toward the achievement of the stated goals, specific measurement procedures will be implemented, as outlined:

Goal 1:

Cape Breton Island's visitor economy will have fully recovered from the COVID-19 pandemic and grown by 50% over 2019.

- A new model will be developed for estimating the size of the visitor economy on Cape Breton Island and this will be measured on an annual basis to track its growth compared to a 2019 baseline.

Goal 2:

Cape Breton Island will become a viable four-season destination with a minimum monthly occupancy rate of 50% and minimum monthly room nights sold of 30,000.

- Room night data from Tourism Nova Scotia will be utilized and will be measured on an annual basis to track growth compared to the goal.

Goal 3:

The satisfaction rate of visitors, industry, and residents will have grown annually.

- Annual surveys will be conducted to measure resident sentiment, industry satisfaction, and visitor satisfaction.
- Destination NEXT assessments will be conducted in 2024 and 2029.

Goal 4:

Those working within the tourism industry or dependent upon tourism (e.g. artists, creators, language bearers, heritage and cultural interpreters, adventure guides, entrepreneurs, etc.) who have previously subsisted will have sustainable and viable opportunities to thrive and create wealth.

- A project will be undertaken to determine the best method to measure this goal. Once determined, this will be measured on a regular basis.

Goal 5:

Cape Breton Island will be established as a smart destination with the industry having embraced and excelled in digital transformation and conversion.

- A project will also be undertaken to determine the best method to measure this goal. Once determined, this will be measured on a regular basis.

Reporting Procedures

To report on the progress of this strategy, the following steps will be taken:

1

An annual progress report will be prepared and made available to all stakeholders.

2

An annual progress report presentation will be delivered to the tourism industry and to stakeholders.

3

A dedicated section for the strategy will be added to the new industry website at destinationcapebreton.com.

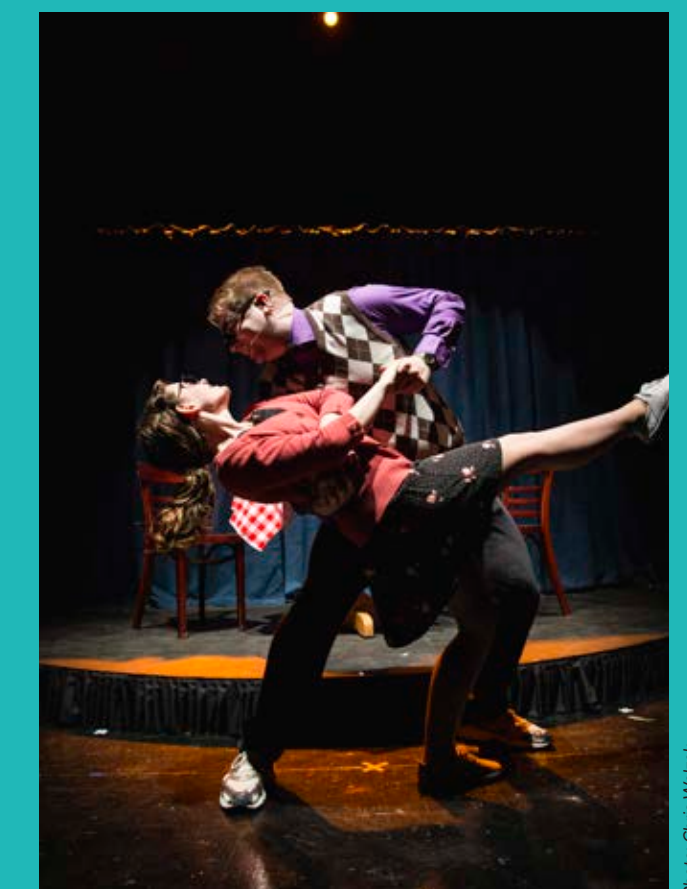


Photo: Chris Walzak

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