

Cape Breton Island

your heart will never leave.



Destination Cape Breton Strategy

2024-27



We acknowledge that we are in Unama'ki – the Mi'kmaw L'Nu name for Cape Breton Island – one of the seven traditional districts of Mi'kma'ki, the ancestral and unceded home of the Mi'kmaw L'Nu People.



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Introduction



Introduction

The Destination Cape Breton Strategy for 2024-27 charts a course to responsibly grow the Cape Breton Island-Unama'ki visitor economy over the next three years. While the economic forecast for 2024 is predicting challenging conditions for the first half of the year, the second half should turn the tide and lead to momentum in 2025 and 2026. That said, 2024 still holds promise, as the Island will play host to the World Women's Curling Championship, Canadian 3D Indoor Archery Championships, Telus Cup, Music Tourism Convention and Canada Soccer U-17 Nationals, in addition to annual festivals and events like the Celtic Colours International Festival, KitchenFest, Cabot Trail Relay and numerous others.

The strategy has been informed by recent results, research and emerging trends in the tourism industry. This strategy has also been shaped by future state scenarios within the soon-to-be-released Unama'ki-Cape Breton Island Economic Impact Assessment for the Tourism Industry. These scenarios provide data-based analysis to recommend where investment and effort should be focused for the greatest economic impact. As such, the strategy is designed to optimize the report's recommendations.

The next three years will bring rapid change to the way we work with the growth of artificial intelligence (AI) platforms and will have impacts on the travel industry. Based on current guidance by industry experts, Destination Cape Breton will embrace AI and other technology tools. However, at the same time, research emphasizes the importance of authentic connection with a place, its culture and its people. Destination Cape Breton will aim to strike a balance between these two realities.

This strategy has a three-year time horizon, as it will take multiple years to reach the assigned targets, but it will adapt to changing conditions and be updated in each of the next two years.



Results



Results

As we look ahead to the next three years, we start by looking back at the past few years to assess results and view trends. At the beginning of that period, in 2018 and 2019, Cape Breton Island was still riding a decade-long growth trend. This decade of growth directly corresponds to investments in marketing through the establishment of the Cape Breton Island Marketing Levy, accompanying investments by the Government of Canada and collaborative funding support from the Province of Nova Scotia. Over that period, the incremental growth in room nights sold on Cape Breton Island more than doubled the province overall. While licensed room nights sold declined slightly in 2018 and 2019, short-term rental units sold (mainly Airbnb) during those years more than made up the difference.

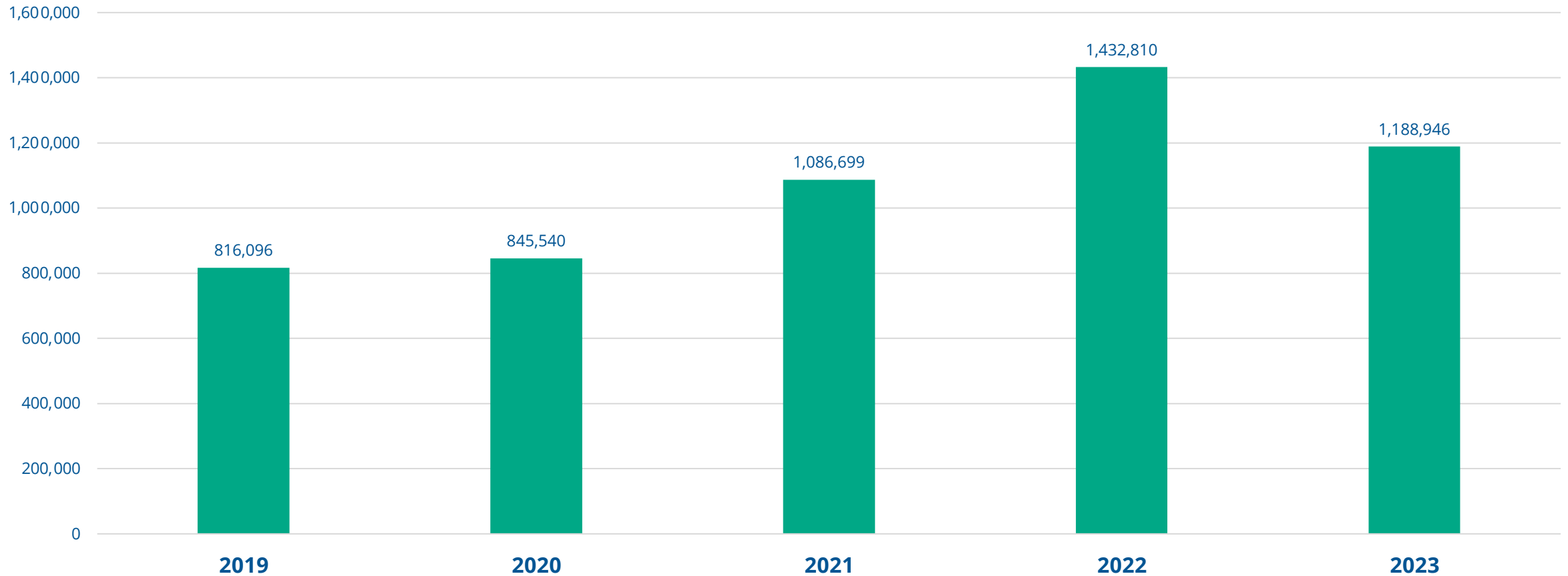
Through 2020 and 2021, Cape Breton Island was impacted significantly by the COVID-19 pandemic. In 2020, room nights sold were down 55% from 2019. In 2021, with visitation opened up to the rest of Canada in July, room nights sold improved significantly over 2020, but were still down 36% from 2019.

The 2022 year was a strong recovery year for most operators, with room nights sold up 5% over 2019 levels. Short-term rental units sold were up 21% over 2019 and at record levels. However, 2023 provided mixed results. Room nights sales were up 13% over 2022 through the first six months of the year but were down in the summer. A myriad of challenges, including the impact of media coverage of natural disasters in Mainland Nova Scotia, the wettest summer on record for most of Cape Breton Island and the eroding of disposable incomes due to inflation and higher interest rates, combined to impact visitation to the destination.

The industry continues to be challenged by workforce shortages that are further exacerbated by housing shortages in many communities around the Island. These challenges are being felt across the country and will likely take years and significant effort to fully address.

visitcapebreton.com Sessions

Five-year Trend, 2019-23



Source: Google Analytics

The vast majority of Destination Cape Breton's marketing efforts are designed to drive traffic to visitcapebreton.com. The chart shows the growth of website traffic over the past five years. Sessions in 2022 hit a record, eclipsing 1.43 million, a 32% increase over 2021. This was driven primarily by domestic traffic.

In 2023, the second highest year for sessions was recorded but was down 17% from 2022. Much of this was attributed to a 40% higher cost per click for digital advertising. Despite the decrease, a shift in focus to increased engagement resulted in leads (clicks from visitcapebreton.com to operator websites), being up 120% over 2022.

visitcapebreton.com Sessions by Market

2019-23



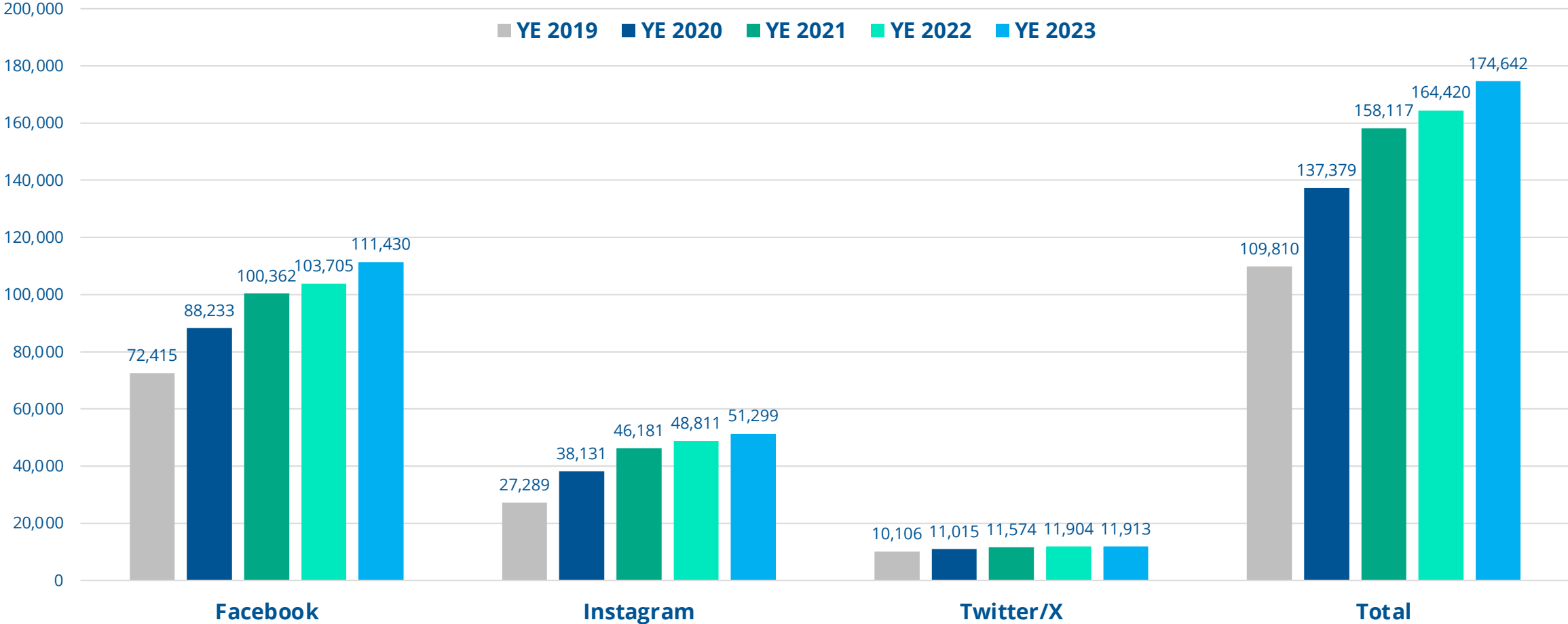
Source: Google Analytics

In looking at the three main geographic markets for Cape Breton Island, Ontario has been the largest source of sessions, with the exception of the pandemic years. The increases in the Maritimes market in 2020 and 2021 coincided with a much larger investment, as it was a foundation for travel demand in an uncertain time.

In 2023, sessions increased in every market, except Ontario (down 31%), where costs per click rose most significantly. Quebec was up 17% and the Maritimes were up 5%. A smaller campaign in Alberta was up 21%.

Social Media Follower Growth

Year-end 2019-23



Source: Facebook, Instagram, Twitter Insights

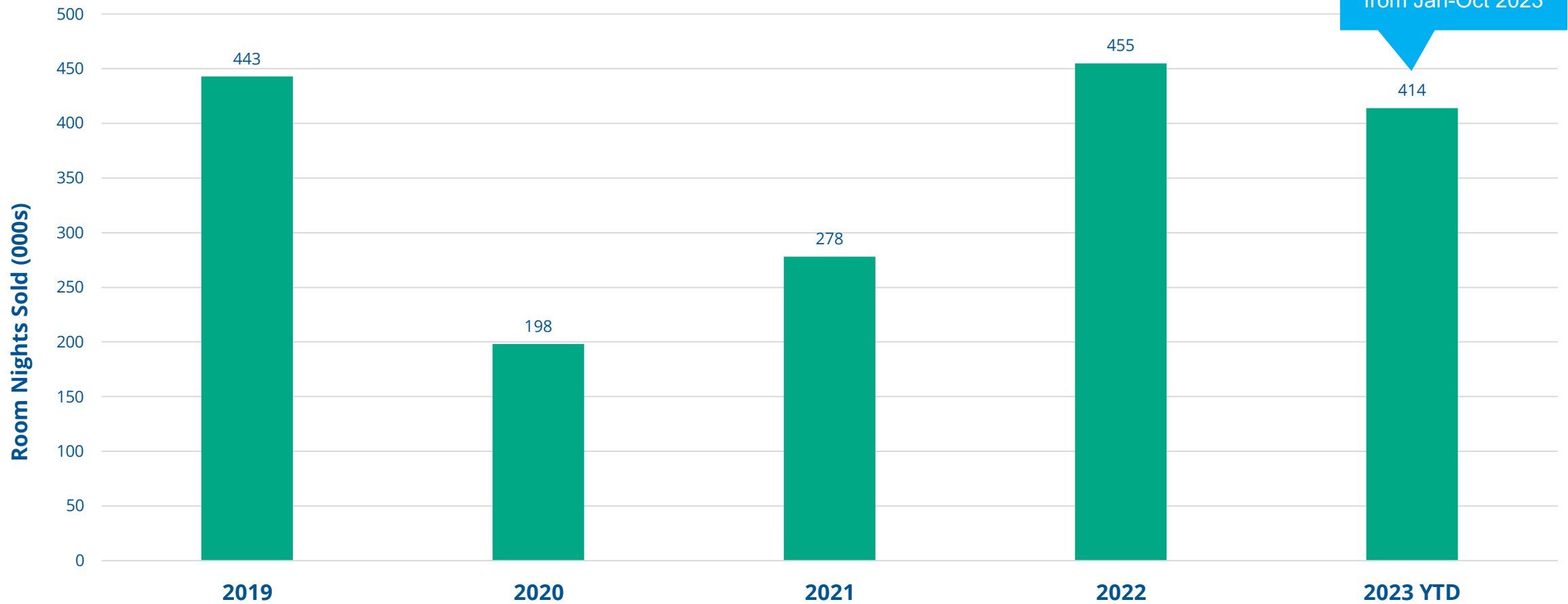
Social media follower growth increased steadily over the past five years and increased by 60% over that period. This was led mainly by Facebook and Instagram, while Twitter/X had comparatively smaller growth. Women comprise about two-thirds of followers, with Instagram skewing toward the young adult segment and Facebook

skewing toward the 45+ segment.

Engagement (reactions, comments, shares) increased by over 50% in 2023 compared to 2022, but reach was down 22%, mainly due to changes in the Facebook algorithm.

Registered Room Nights Sold

2019-23



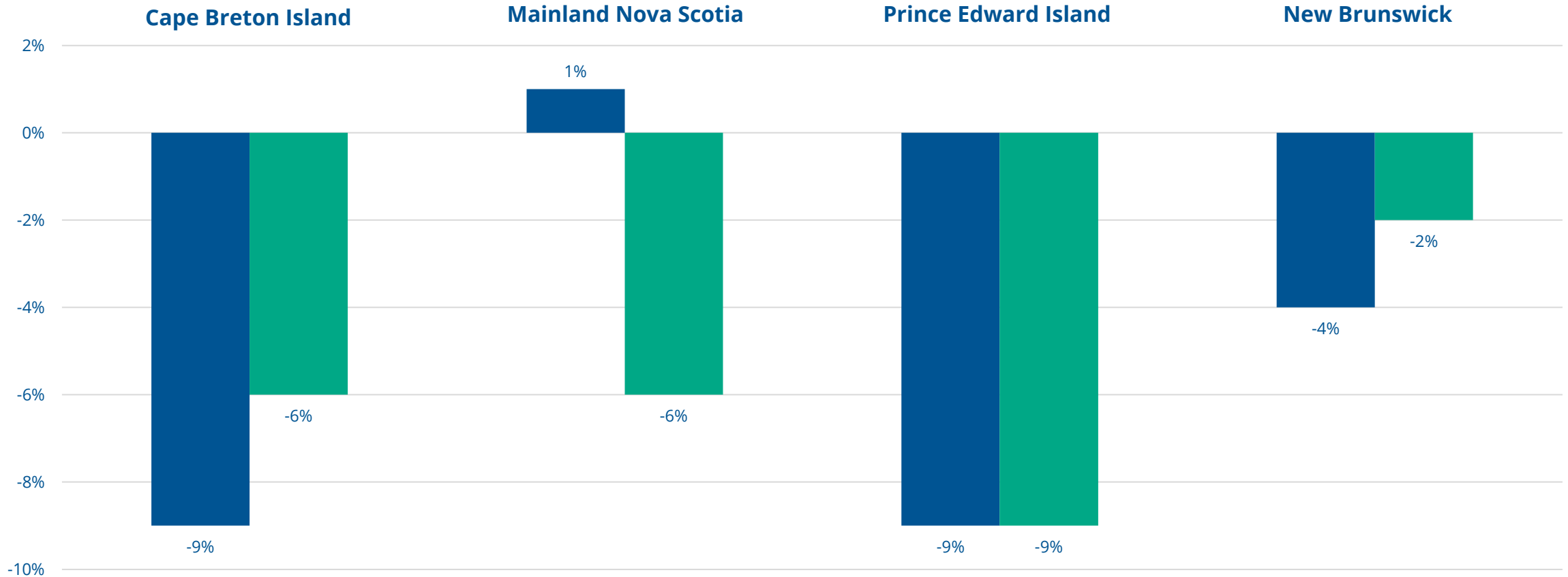
Source: Nova Scotia Tourism Indicators

Conversions are measured mainly through room nights sold. Overall, registered room nights sold declined slightly in 2019, mainly due to short-term rentals capturing a greater share of the accommodation market, as they saw strong growth (see page 11). Room nights sold in 2020 were down 55% from 2019 and 2021 was down 36% from 2019.

Room nights sold in 2022 were up 5% over 2019, indicating a strong recovery year. In 2023, to the end of October, room nights sold were on par with 2022. To the end of June, room nights were up 13%, but July was down 9% and August was down 6%. The fall was also down with September being down 2% and October down 5%.

Change in Room Nights Sold – Maritime Regions

July-August, 2022-23

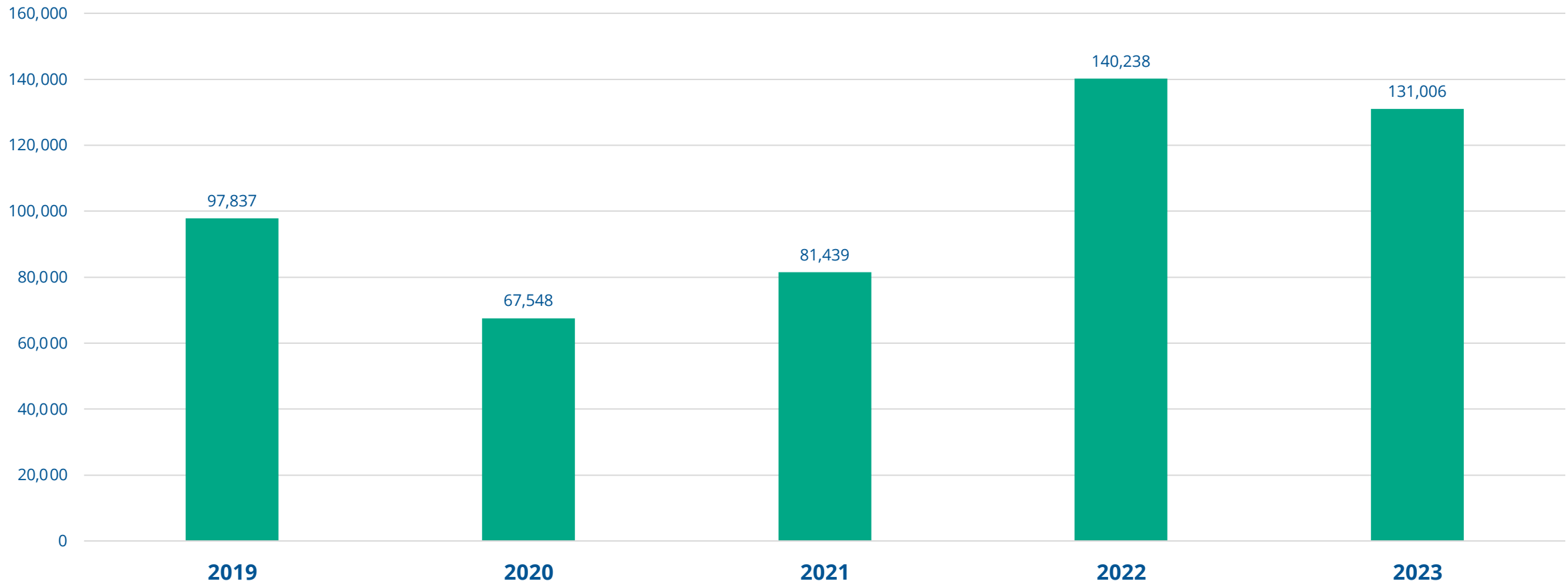


Cape Breton Island wasn't the only region to see a decline in the peak season months of July and August. As the chart above shows, all regions of the Maritimes were down in this period. Prince Edward Island and Cape Breton were both down 9% in July, but Cape Breton was slightly better in August while PEI was again down 9%. PEI was also down 9% in September and 24% in October.

Mainland Nova Scotia saw the only period of growth in the region, which was mainly attributed to Halifax hosting a number of events, such as the North American Indigenous Games. New Brunswick fared slightly better, but still saw declines in each month. Reports from other regions indicate that the issues of media coverage of natural disasters, wet weather and eroding disposable income also impacted these regions.

Short-term Rental Unit Nights Sold

2019-23



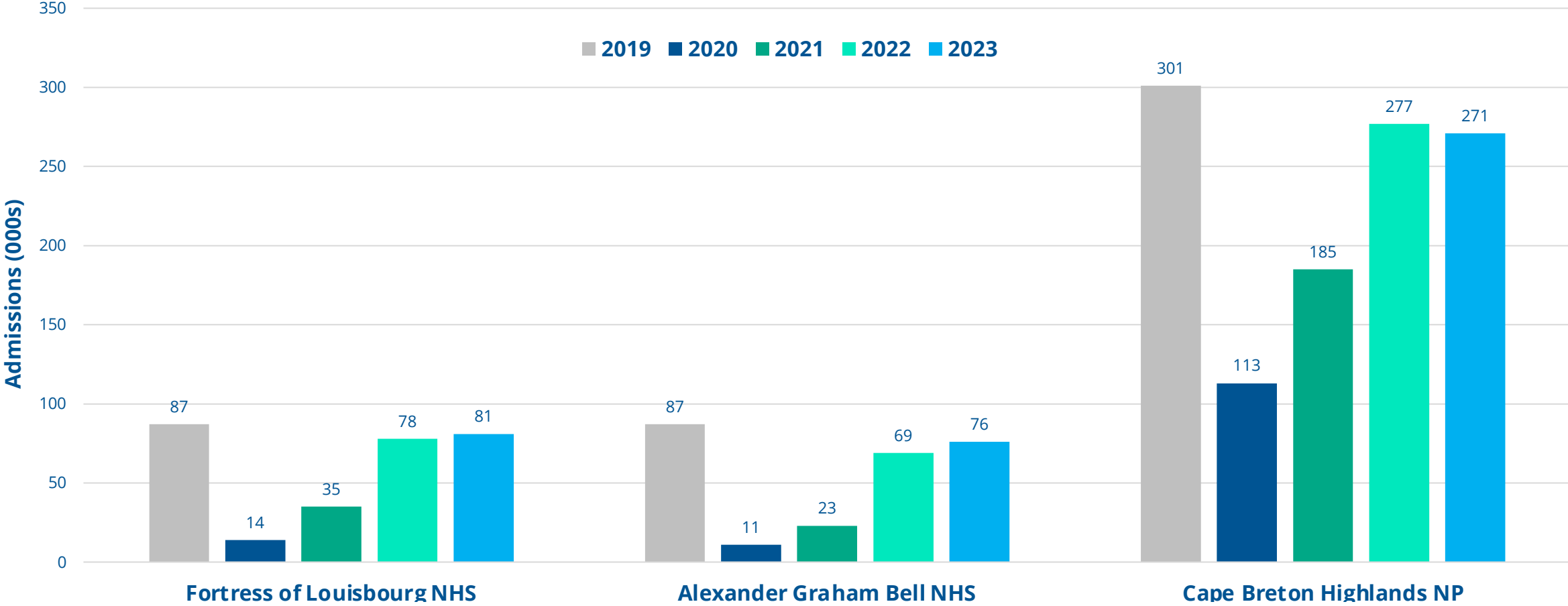
Source: AIRDNA

Short-term rental unit nights sold (mainly through Airbnb) grew significantly in 2019 (+53%) and captured a greater share of the accommodation market. During the pandemic, short-term rental unit nights sold were down 31% in 2020 and 17% in 2021 compared to 2019, but this was a lesser impact than for registered room nights sold.

In 2022, short-term rental unit nights sold were up 21% over 2019 levels, with record spring, summer and fall sales. In 2023, short-term rentals were impacted in the summer months to a similar degree as all registered room nights sold. Total STR rental unit nights sold were down 6.5% compared to 2022, but still a significant portion of the total accommodations market.

Parks Canada Site Visitation

2019-23



Source: Parks Canada

Visits to Parks Canada sites on Cape Breton Island-Unama’ki continue to be in recovery mode following the pandemic. Both the Fortress of Louisbourg (+4%) and the Alexander Graham Bell (+11%) National Historic Sites were up over 2022, but still have not recovered to 2019 levels. Both sites have benefited from a very strong cruise season in 2023.

Cape Breton Highlands National Park was down 2% in 2023 compared to 2022, and down 10% from 2019. The spring and fall were up for the National Park, but July and August were down due to the same reasons that impacted room nights sold.



Strategy Overview



Forecast

In its Fall 2023 Tourism Outlook report, Destination Canada states that “Canada’s economy is expected to grow 4.5% per year from 2024 to 2030. Spending within Canada’s tourism industry will grow faster than the overall economy, increasing at an annual rate of 5.8%.” However, the report also states that “The global tightening of monetary policy aimed at curbing inflation is likely to cause a brief technical recession towards the end of 2023 or the beginning of 2024.” This is expected to ease by 2025 but is likely to have an impact on disposable incomes, and thus travel, in 2024.

TD Economics is far more conservative in its outlook and states that Canada’s economy is forecast to see an economic slowdown in 2024 with growth at 0.5%. It is forecasting a rebound of 1.5% in 2025 and 2% in 2026, with long-term growth expected to stabilize at 1.8% annually. TD Economics projects US growth to be 1.5% in 2024, followed by 1.7% in 2025 and 2% in 2026.

The Destination Canada report states that strong economic headwinds from inflation and higher interest rates will continue to impact disposable incomes in 2024, leading to slowed tourism growth domestically and from the US market. However, the report aligns with TD Economics in forecasting a recovery in 2025 and stable growth beyond.

These forecasts point to the imperative to take a very focused path to driving visitation results to the greatest extent possible, particularly in the short-term. With modest growth, there is an opportunity for operators to continue to take managed steps toward addressing their workforce shortages to be ready for the stronger growth to come.

Additionally, as “uncertainty is the new certainty,” steps must also be taken to make the industry more resilient to external impacts such as natural disasters and geopolitical issues.



The Travel Context

Destination Canada has placed an emphasis on targeting high-value guests as their leisure target audience. This segment is affluent and tends to be somewhat more insulated from economic pressures. High-value guests as follows:

Our high-value guest (HVG) is a Canadian or international traveller who makes travel choices based on their desire for self-enrichment and personal motivations for travel. They visit destinations consistent with their personal values, with an increasing consciousness around responsible travel. They are not driven by price. They are naturally curious and want to invest time and energy into a destination by staying longer and immersing themselves into the local culture, actively seeking the local hidden gems in addition to the tourist attractions. They respect and celebrate the place and people. At best, they want to leave a destination better than they found it and, at least, they want to minimize their footprint.

In Destination Canada's report, *Tourism's Big Shift: Key Trends Shaping the Future of Canada's Tourism Industry*, the following travel trends were identified that are relevant to Cape Breton:

- **Responsible Travel**
There is growing consumer research predicting that travellers want to lighten their footprint on destinations – supporting local economies, engaging with local cultures, reducing carbon emissions and enabling environmental conservation.
- **Indigenous Connection**
Research conducted by the Indigenous Tourism Association of Canada and Destination Canada shows that one in three Canadians is interested in Indigenous experiences and culture.
- **Wild for Wilderness**
Many travellers are seeking physically challenging adventures, while others are seeking passive ways to engage with nature.



- **Health and Wellbeing**

According to the Global Wellness Institute, the wellness travel market is growing and people have become hungry for a sense of wellbeing since the pandemic.

The description of high-value guests closely aligns with the descriptions of Destination Cape Breton's target Explorer Quotient segments, Authentic Experiencers and Cultural Explorers. High-value guests and the highlighted trends also align with the DNA of Cape Breton Island-Unama'ki as a destination.

Destination Canada's Tourism's Big Shift report also states that digital automation will be accelerated. To respond to the workforce shortage, some operators have invested in new tools to rapidly increase the efficiency of their operations. This has included many facets of the operation from contactless check-ins at accommodations to bookkeeping efficiencies. The rise of AI deployment in travel will provide more powerful tools and platforms to streamline operations. It will be important to strike a balance between the effective use of technology and the visitors' need for human interaction.

The cruise sector saw record growth in 2023 with 110 ship visits bringing over 170,000 passengers. The schedule for 2024 is looking even stronger, running from April to November. In 2025, Cape Breton Island-Unama'ki will also see the introduction of winter cruising with the Ponant line visiting Sydney and Gulf of St. Lawrence ports. Louisbourg and Baddeck had visits from expeditionary cruise vessels and there continues to be opportunity for smaller ports.

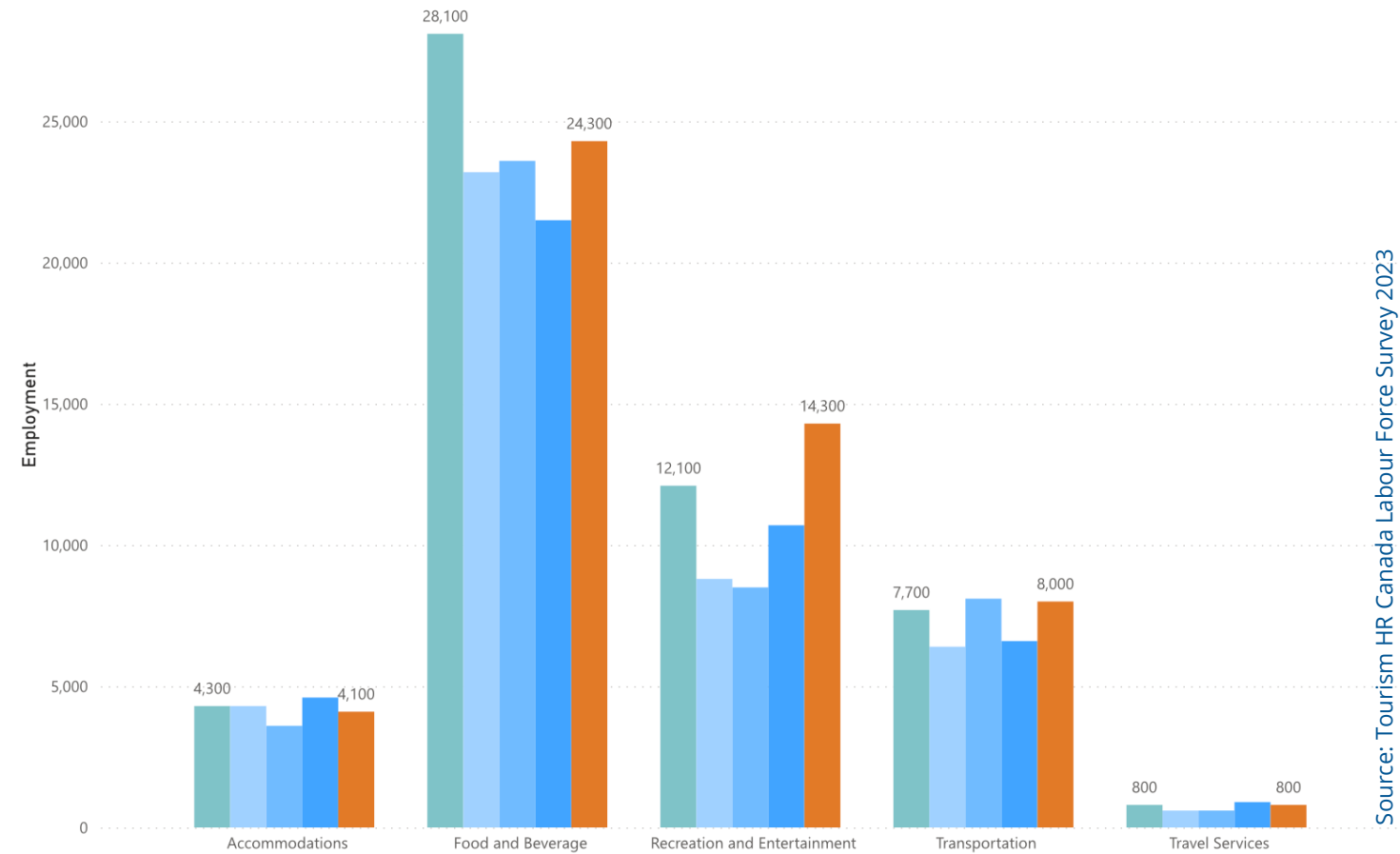
Canada's airline industry continues to experience significant challenges with a shortage of pilots and air traffic controllers. The seat capacity of flights to JA Douglas McCurdy in 2023 was less than half of 2019 levels, despite strong demand for its two daily routes. The Sydney Airport Authority is working to restore the Sydney-Halifax route and to increase capacity overall. The Allan J. MacEachen Airport in Port Hawkesbury has seen significant traffic from private aircraft driven by visitation to Cabot Cape Breton and other high-end experiences as well as commercial traffic in the Strait area.



There continues to be a workforce shortage in the tourism industry, but mainly in food and beverage. The chart below, from Tourism HR Canada's 2023 Labour Force Survey, shows the tourism industry employment in Nova Scotia by category. While other categories have approached or achieved recovery to pre-pandemic levels, food and beverage still has a gap of 3,800 positions across the province. This has been echoed by research conducted by the World Tourism Institute at Cape Breton University that is specific to the Island.

Tourism Industry Employment

Year ● 2019 ● 2020 ● 2021 ● 2022 ● 2023



Source: Tourism HR Canada Labour Force Survey 2023



Target Audience

Research conducted over the past number of years has clearly defined the target audience for Cape Breton Island-Unama'ki. For the coming three years, it can continue to be defined as follows:

Demographic

- Empty nest couples aged 45+
- Young adults aged 22-32 (post-education and pre-family)
- Females do the majority of travel planning (57% of web visits and 60%+ of social followers)
- Post-secondary educated, employed full-time or retired

Geographic

- Maritimes
- Ontario
- Quebec
- Alberta and British Columbia are emerging markets (as rental car supplies replenish)
- Northeastern United States

Psychographic (Explorer Quotient Types)

- Authentic Experiencers (33% of visitors)
- Cultural Explorers (24% of visitors)

Destination Canada categorizes Authentic Experiencers and Cultural Explorers as 'Learners'. They are drawn by culture and natural beauty. They seek engagement in a destination – to meet locals and to be participants in the culture.



Visitor Economy Future Growth

In 2023, Destination Cape Breton partnered with a number of other partners to commission the Unama'ki-Cape Breton Island Economic Impact Assessment for the Tourism Industry, which was delivered by KPMG. The report determined that, although the Island comprises 13.6% of the Nova Scotia population, its tourism industry delivers approximately 20% of Nova Scotia's tourism GDP. The economic output of the Island's tourism industry is in the range of \$575-721 million per year, making it one of Cape Breton Island-Unama'ki's key sectors.

The study also looked at future state scenarios and their potential impact on the visitor economy. The scenario deemed to have the strongest potential impact was the lengthening of the trip duration on the Island. Extending the average length of stay from 4.4 days (source: Tourism Nova Scotia) to 5.4 days would have a corresponding impact of over \$125 million per year.

The scenario with the next strongest potential impact was growing year-round tourism. Increasing tourism between November and April (i.e. mainly winter tourism) by 12% would have a corresponding impact of \$70 million per year.

The final scenario that showed strong potential impact was attracting high-value visitors. Increasing the average visitor spend by 10% would have a corresponding impact of \$58 million per year.

These future state scenarios are valuable in determining where resources should be allocated within this strategy.



Guiding Principles

The 2024-27 strategy for Destination Cape Breton is based on the following guiding principles:

1. It is designed to pursue the strongest future growth scenarios in the Unama'ki-Cape Breton Island Economic Impact Assessment for the Tourism Industry.
2. It is developed in alignment with the Federal Tourism Growth Strategy, Tourism Nova Scotia's strategy, Destination Canada's strategy and NSITEN's strategy.
3. It continues to utilize Destination Canada's award-winning and proven Explorer Quotient (EQ) psychographic profiles, focusing primarily on Authentic Experiencers and Cultural Explorers.
4. It adheres to the Continuum that Research drives Product, Product drives Brand and Brand drives Marketing.
5. It is designed to be resilient to quickly adapt to changing conditions.
6. It focuses on promoting the Island's core assets/motivators and niche activities.
7. It bases all decisions on the best evidence, wherever possible.



Goals and Objectives

To optimize the impact on the Cape Breton Island visitor economy, the strategy will focus on six main objectives for 2024-27:

- To enhance the brand of Cape Breton Island as a bucket-list destination and one of the top islands in the world;
- To responsibly grow visitation levels, with particular emphasis on the growth of shoulder and winter seasons;
- To increase the average length of stay by one day;
- To increase the average visitor spend by 10%;
- To work with industry partners to elevate the quality of the visitor experience to meet the needs of high-value guests; and
- To become recognized as a truly sustainable and inclusive destination.

Using these objectives as the focus, the following measurable goals will be pursued:

1. To increase the Net Promoter Score for the destination from 69.8 to 75.
2. To grow total registered room nights sold on Cape Breton Island by 2% in 2024, 4% in 2025 and 4% in 2026.
3. To reach average monthly accommodation occupancy rates of 50% for April-June, 60% for September-November and 40% for December to March.
4. To increase the average length of stay from 4.4 days to 5.5 days;
5. To increase the average rating of tourism businesses on the Island;
6. To develop and implement sustainable tourism and equity, diversity and inclusion plans for the destination.



Coffee
Organic, Fair Trade Teas & Coffees

Cappuccino 4.35/4.75	Filler 2.35/2.75
Latte 4.35/4.75	Americano 3.35/3.75
Mocha 4.75/5.00	Espresso 2.00/2.75
Caramel Macchiato 4.75/5.00	

Iced

Iced Filler 3.35/3.75	Iced Tea 2.75/3.25
Iced Coffee 4.00/5.00	Iced Mocha 4.75/5.00
Iced Caramel Macchiato 4.75/5.25	real Ice Cap 2.00/2.50
Iced Chai Latte 4.00/5.00	Caramel Macchiato Shake 9.00

Teas & Choc

Chai Latte 4.00/5.00	London Fog 4.00/5.00	
Loose Leaf Tea 2.50/2.75	Hot Chocolate 4.00/4.50	
Flavour Shot 0.70	Oat Milk 0.70	Whip Cream 0.70

PLEASE ADD HST

KIDS & SNACKS

Baby Scoop Ice Cream 2.00 (no kit)
Choose Any Flavour
Giant Mr Freeze 2.00 (no kit)
Choose Any Flavour
Small S'moresable Pack 1.00 (no kit)
Choose Any Flavour
Bubbly / Water 2.00
Pop 2.00
Giant Pretzel & Dip 4.00
<small>Public health warning: healthy product, served with caution to young children/elderly.</small>

Enhancing the Brand



Enhancing the Brand

Cape Breton Island-Unama'ki benefits from relatively strong brand equity in our key markets, as it has had dedicated destination marketing going back decades, in addition to being promoted by the Province as a key tourism region. The Island has garnered numerous third-party accolades that reinforce the brand, such as being named Top Island in Canada by *Travel + Leisure* and Top Island in North America by *Condé Nast*. The Cabot Trail, Cape Breton Highlands National Park, Bras d'Or Lake, our lobster and our golf experience have all received further accolades.

In 2023, the brand identity was enhanced with the addition of fall and winter logo treatments. A process was also initiated to develop a Mi'kmaw L'Nu version of the logo and plans for French and Acadian versions are in the works.

To continue to enhance the brand, the following strategies are recommended:

1. To develop a process to facilitate authentic human connection with the Island, its culture and its people

- Launch a new campaign for 2024 that will be focused on connection
- Curate and share content that illustrates the authentic connections that visitors make with the destination
- Work with CBU/WTI to evolve its Ambassador micro-credential into an Ambassador Network and recruit more residents to the program
- Work with VIC staff members to create a concierge network with an emphasis on providing a human connection to those who seek it

2. To employ a Two-eyed Seeing approach to brand building

- Continue the process to create a Mi'kmaw L'Nu version of the logo, working with Mi'kmaw L'Nu designers and supported by the input of knowledge keepers
- To work with Mi'kmaw L'Nu advisors to ensure all related content is authentic to their culture



3. To continue to pursue top island recognition

- Initiate campaigns, in conjunction with industry, to encourage voting in *Travel + Leisure* and *Condé Nast* annual reader rankings
- Leverage top island recognition in all marketing efforts

4. To ensure alignment across the destination with communities and the tourism industry

- Host engagement sessions in key tourism communities across the Island to discuss current challenges, how Destination Cape Breton can better support their needs and how we can achieve brand alignment across the Island
- Identify new content creation opportunities that will reinforce the brand while meeting the needs of communities

5. To explore ways to enhance the brand while visitors are on the Island

- Explore opportunities to enhance the brand at gateways to the Island – the Canso Causeway, airports and ports
- Develop an Island-wide signage strategy

6. Explore opportunities for brand reinforcement

- Develop French and Gaelic versions of the destination logo
- Explore a branded merchandise program
- Streamline URLs to [visitcapebreton.com](https://www.visitcapebreton.com)



Growing Year-round Visitation



Growing Year-round Visitation

As previously mentioned, building to a year-round destination holds strong future growth potential. There is potential to grow visitation in all months compared to 2023, but there must be an emphasis on growing the shoulder and winter seasons to achieve the greatest impact. It is also important to ensure that growth is responsible, taking care that the tourism industry complements and reinforces the quality of life of residents, rather than negatively impacting it.

To grow year-round visitation in a responsible manner, the following strategies are recommended:

1. To expand the digital marketing program in the target markets of Ontario, Quebec, the Maritimes, Western Canada and the Northeastern United States

- Invest more resources in all portions of the path to purchase, but with an increased portion in upper funnel/awareness generation tactics
- Continue to partner with Tourism Nova Scotia in their Digital Content Marketing Program
- Collaborate with Tourism Nova Scotia to “piggy-back” on their marketing efforts in Western Canada and the Northeastern United States
- Explore the growing advertising opportunity on streaming channels

2. To expand the content marketing program to increase reach and engagement with the target audience

- Significantly increase the creation of engagement content, working in collaboration with communities and industry, particularly in video
- Leverage the power of AI to increase the productivity of content creation, thus allowing more content to be created
- Create more ‘long-tail’ content for stronger search engine optimization results
- Invest in hosting more content creators/influencers with strong followings in key markets
- Redesign the website to serve as a powerful content hub that leads to conversion



3. To launch Events Cape Breton 2.0 focused on the attraction, creation and innovation of business, sport and cultural events

- Invest in the events program with dedicated financial and human resources for event attraction and development
- Develop an events incubator program focused on the creation and/or innovation of annual homegrown events that drive incremental visitation to the Island
- Partner with CBRM to create a major events attraction fund
- Implement a business events program that positions the Island as a premier small meetings (500 people or less) and corporate retreat destination

4. To explore the potential for marketing to Francophone audiences within the key markets

- Explore the feasibility of utilizing AI to translate content to French
- If feasible, create a French version of digital content channels, including website, mobile app, social channels, videos, etc.

5. To continue working with Cape Breton Island-Unama'ki's performing artists

- Collaborate with touring artists to promote the destination during their tours
- Explore the development of a touring 'Taste of Cape Breton-Unama'ki' experience
- Engage renowned artists in the content creation program

6. To continue working with partners to develop winter tourism

- Implement learnings from the upcoming winter best practice mission to Charlevoix, QC (February 2024)
- Prioritize actions from the Winter Readiness Project and implement with partners
- Collaborate with partners to build winter capacity in key communities

7. To explore further development of the spring and fall shoulder seasons

- Build on the growing interest in Waterfall Season with new experiences
- Capitalize on the success of the Cabot Trail Food Truck Rally to explore other events to drive early and late fall visitation
- Work with partners to explore other shoulder season opportunities



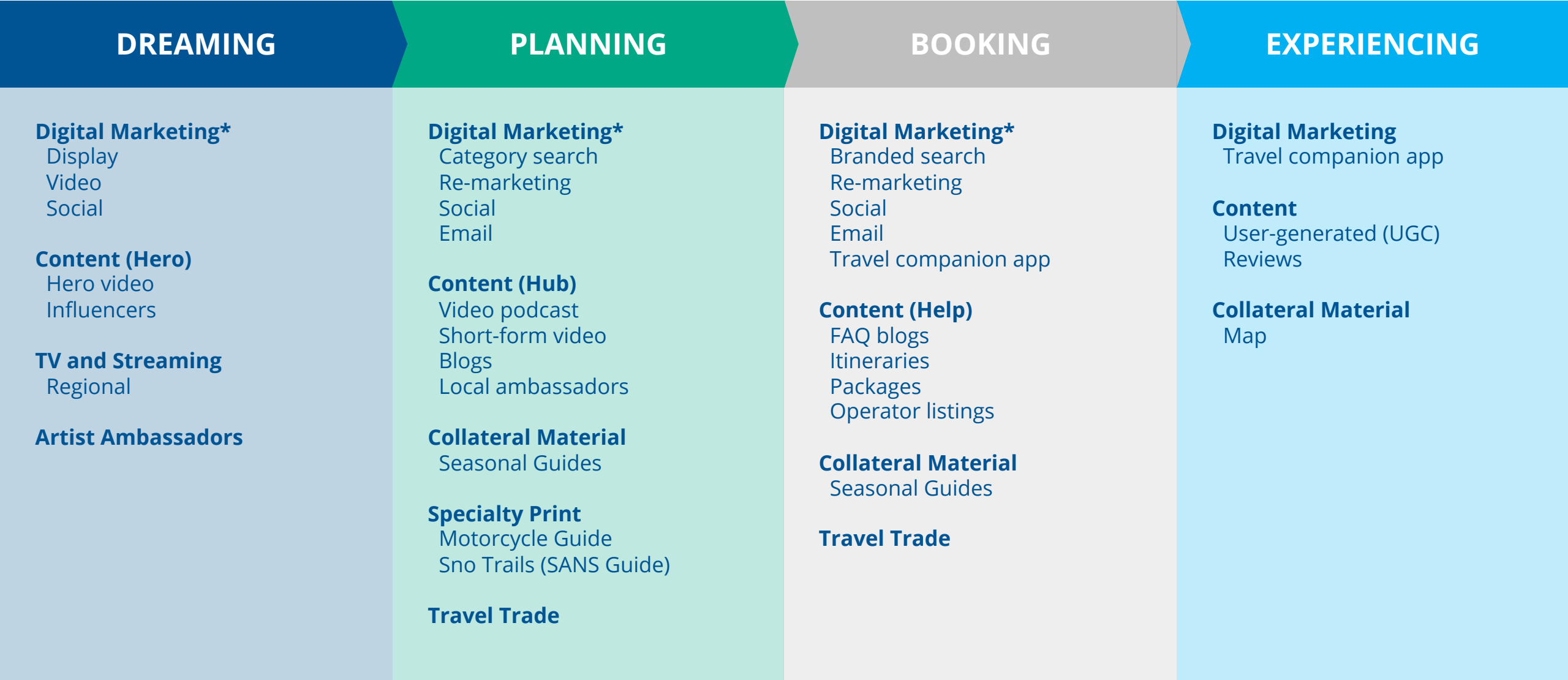
8. To mitigate the impact of media coverage of natural disasters and inclement weather

- Update the crisis communication playbook and prepare an “open for business” campaign
- Develop inclement and all-weather experiences along with content

9. To work with partners to increase air access to the Island

- Support the efforts of the Sydney Airport Authority to attract new and/or expanded routes to YQY
- Explore the potential for a seasonal commercial route to western Cape Breton Island-Unama’ki

The Path to Purchase



* Digital marketing is largely conducted in partnership with Tourism Nova Scotia through their Digital Marketing Content Program.



Increasing Length of Stay



Increasing Length of Stay

The future state scenarios in the Unama'ki-Cape Breton Island Economic Impact Assessment for the Tourism Industry determined that increasing the average length of stay of a visitor has the greatest potential impact on the visitor economy. To increase length of stay, one has to influence the visitor while they are in the planning and booking stages of their path to purchase. Additionally, for those visitors with some flexibility in their travel plans, there is an opportunity to influence them at the experiencing stage while they are on the Island.

To increase the average length of stay, the following strategies are recommended:

1. To significantly increase content that educates potential visitors on the vast array of activities and regions on the Island that will appeal to them

- Employ week-long stay messaging with potential visitors (and 4-day getaway messaging for potential visitors in the Maritimes for shoulder and winter)
- Utilize AI to personalize touchpoints with potential visitors to curate content for their specific interests
- Develop 7-day itineraries for specific interests that take visitors to each region of the Island
- Create compelling new content around 7-day stays
- Encourage operators to cross-sell other regions and operators and upsell additional days

2. To continue working with tour operators to develop Cape Breton Island-Unama'ki specific itineraries and increase share of wider itineraries

- Educate tour operators on the appeal of the destination, focused on experiences and regions of the Island they are missing in current offerings
- Attend travel trade events, including Rendezvous Canada and Atlantic Canada Showcase, and explore other potential events (NTA Travel Exchange, Adventure Travel Trade Association, etc.)



3. To launch the Travel Companion mobile app (an AI-driven mobile app of Cape Breton Island-Unama'ki experiences that is not cell coverage dependent)

- Leverage AI to learn specific visitor interests and recommend experiences that will appeal to them while visiting the Island
- Develop an on-Island campaign to promote downloading the app

4. To be a catalyst for the development of new experiences that will appeal to the target audience

- Explore the development of a tourism experience innovation hub that will conceptualize new experiences based on data and test experiences before spinning them off to industry



Increasing the Average Spend



Increase the Average Spend

Unama'ki-Cape Breton Island Economic Impact Assessment for the Tourism Industry determined that increasing the average spend of a visitor has significant potential to impact on the visitor economy. Anecdotally, we have heard from visitors who reported leaving the destination with “more money in the wallets than they expected.” Tourism expert Roger Brooks states that 70% of non-lodging spending in a destination happens after 6:00 PM on shopping, dining and entertainment. Despite this stat, many areas of the Island close retail shops at 5 or 6 pm, dining options at 8 pm and there are often few entertainment options after 9 pm. To address this issue, a cultural shift is needed.

Another way to increase the average spend is to focus on attracting more high-value guests, as recommended by Destination Canada. These travellers are affluent and have higher than average disposable incomes.

To increase the average visitor spend, the following strategies are recommended:

- 1. To work with communities and tourism operators to build their evening economies**
 - Generate awareness of the issue among communities and the tourism industry
 - Encourage tourism operators to make a shift in their operating hours to open and close one hour later
- 2. To target more high-value guests in marketing campaigns**
 - Dedicate resources and messaging to targeting high-value guests
 - Dedicate resources to niche markets that skew to high-value such as golf, boating, sport fishing, skiing, snowmobiling, etc.
- 3. To build a booking option into the Travel Companion app**
 - For a future version of the app, a booking option will be provided (subject to operator approval) to encourage incremental spending



Elevating the Visitor Experience



Elevating the Visitor Experience

A significant portion of Cape Breton Island-Unama'ki's tourism product was developed for a time when summer family roadtrips and motorcoach travel were the bread and butter of the industry. With the rise of the experience economy over the past twenty years, there has been a trend toward visitors seeking more upscale offerings. Restaurants like L'abri, the Freight Shed, Woodroad, The Bothy and others with upscale menus are the most popular dining options in their communities. Accommodations like the Lodge at Cabot Links, Ridge on the Chimney, Lakeside Luxury Domes, the Main Lodge at the Inverary Resort and other similar quality accommodations are among the first to be booked, despite relatively higher rates. This illustrates that visitors are seeking more upscale offerings from our industry.

Additionally, as discussed in the Travel Context section, more visitors are seeking authentic Indigenous cultural experiences, opportunities to connect with nature and a sense of well-being from travel.

To elevate the visitor experience, the following strategies are recommended:

1. To work with Mi'kmaw L'Nu partners to support the enhancement of their experience offerings and support their continued development

- Collaborate with the Nova Scotia Indigenous Tourism Enterprise Network (NSITEN) and Unama'ki partners to support their tourism development priorities
- Establish a Mi'kmaw L'Nu cultural tourism development officer for Unama'ki, in partnership with NSITEN
- Establish regular meetings with Mi'kmaw tourism partners

2. To work with industry and partners to develop and promote experiences and offerings that will appeal to the target audience

- Work with partners to support the ongoing development of new signature experiences



- Continue working with cultural tourism partners, including Acadian, Gaelic, African Nova Scotian and other cultural groups to continue product innovation initiatives
- Continue working with culinary tourism partners to elevate their experiences and offerings
- Work with adventure tourism partners in the development of new experiences

3. To elevate the overall experience to meet the expectations of the target audience

- Educate the industry on what the target audience is seeking
- Work with Cape Breton University and its Cape Breton Island Tourism Training Network project to develop and implement world-class customer service training
- Create a task force of industry partners to identify solutions to the workforce shortage in food and beverage

4. To enhance the position of Cape Breton Island-Unama'ki as a marine tourism destination

- Continue to support the work of the Port of Sydney, niche ports and the Atlantic Canada Cruise Association to elevate the cruise experience
- Collaborate with other regions in the province to launch Boating Nova Scotia a destination brand for marine tourism
- Implement the recently completed a marine tourism plan for Nova Scotia, with a focus on the elements that are specific to Cape Breton Island-Unama'ki

5. Work with the Cape Breton Partnership and Invest Nova Scotia to implement an investment attraction program

- Host a retreat to bring existing investors together to explore opportunities for new developments
- Develop business cases for potential investment opportunities

6. To continue to develop niche markets with growth potential

- Conduct a market assessment for wellness travel



Being Sustainable and Inclusive



Being Sustainable and Inclusive

Research is showing that more and more visitors are seeking to leave a place better than they found it or, at the very least, to minimize their footprint. This aligns with the Mi'kmaw L'Nu concept of Netukulimk. The Unama'ki Institute of Natural Resources defines this concept as follows:

Netukulimk is the use of the natural bounty provided by the Creator for the self-support and well-being of the individual and the community. Netukulimk is achieving adequate standards of community nutrition and economic well-being without jeopardizing the integrity, diversity or productivity of our environment.

The tourism industry of Cape Breton Island-Unama'ki has a responsibility to do its share in striving toward a sustainable future for generations to come.

Over the past few years, North American society has had an increased focus on equity, diversity and inclusion. Cape Breton Island-Unama'ki has long been known as a place with friendly people, but it is imperative to provide a true sense of welcoming and belonging for people of all backgrounds and abilities. Visitors want to feel that they can connect and safely immerse themselves into the fabric of our destination.

To become a more sustainable and inclusive destination, the following strategies are recommended:

1. To develop and implement a Sustainable Tourism Plan for the destination based on the concept of Netukulimk and the Seventh Generation Principle

- Contract a qualified consultancy team to facilitate the development of a comprehensive sustainable tourism plan
- Develop a sustainability task force to steer the plan and its implementation
- Join The Collective – a global network of 30 destinations that will collaborate on implementing sustainable tourism initiatives



2. To work with key partners to roll out equity, diversity and inclusion training and certification initiatives for the industry

- Work with NSITEN and CBU to provide cross-cultural training
- Work with the Canadian Gay & Lesbian Chamber of Commerce (CGLCC) to provide Rainbow Registered training
- Work with CBU/WTI to provide EDI training
- Review soon-to-be-released research from the MacEachen Institute regarding accessibility in the tourism industry and chart a roadmap to become a fully accessible destination by 2030 (as required by legislation)



Measuring Results



Measuring Results

The final component of the Strategy is a robust research and data program to measure results. It was mentioned in the #RiseAgain2030 Destination Development Strategy that there is a lack of Cape Breton Island-Unama'ki-specific data, but this will change in 2024. As a result, as we move forward, there will be more data to guide decision-making and measure the effectiveness of strategies.

To measure results, the following strategic objectives have been defined:

1. To develop a robust research and data program

- Work with CBU/WTI to develop a framework of effective platforms to get better data on the visitor profile – who they are, what they do when they visit and what is their impact
- To discuss research collaboration with Tourism Nova Scotia and the other Nova Scotia destination organizations
- Utilize the soon-to-be-released Canadian Tourism Data Collective
- Initiate Net Promoter Score measurement among visitors and residents

2. To continue to measure and report on key performance indicators

- Room nights sold and occupancy rates
- Shared economy unit nights sold
- Google Analytics
- Social media insights
- Digital marketing effectiveness

3. To continue to monitor relevant regional, national and international research related to tourism trends

- Attend key destination-focused events and webinars
- Monitor tourism research sources such as Tourism Nova Scotia, Destination Canada, TIAC and others



For more information, visit:
destinationcapebreton.com