

Cape Breton Island Tourism Training Network

Cape Breton - Unama'ki Visitor Experience Survey Results

For July, 2023

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Survey Overview

The Cape Breton - Unama'ki Visitor Experience Survey was conducted in July 2023 as part of a tourism industry data development project conducted by the Cape Breton Island Tourism Training Network, a project overseen by the World Tourism Institute at Cape Breton University. The purpose of this survey is to better understand the experiences and impressions of visitors to Cape Breton - Unama'ki and identify areas of improvement for the island's tourism sector.

The survey contained 13 questions. Data for this survey was collected on Cape Breton Island at, Destination Cape Smokey, Iona Highland Village, Cheticamp, the Village of Baddeck, and the St. Peter's Visitor Information Centre. Most surveys were conducted by highly trained graduate students in Cape Breton University's Master of Business Administration in Community Economic Development program. Survey data at St. Peter's was collected using paper surveys. Additionally, survey responses were collected at the Skye River Trail located in We'koqma'q, however, the response rate was low due to lower number of visitors from outside of Cape Breton - Unama'ki to the cultural site.

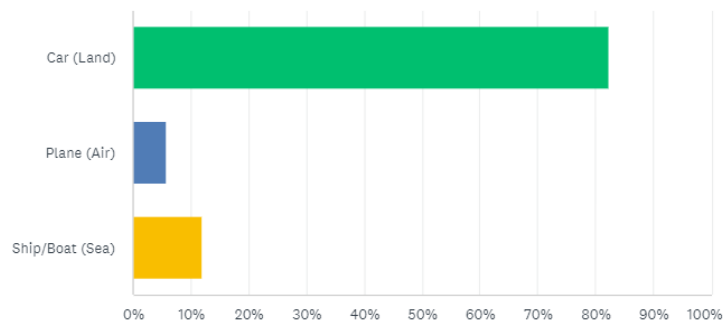
This survey received a total of 211 responses from visitors from outside of Cape Breton.

Based on the initial responses to this survey, an updated survey was developed for the month of August 2023 to better explore areas of interest. Additional location-specific surveys were also created with input from operators from participating locations and distributed over the summer. A larger analysis utilizing data from all visitor surveys conducted over the summer will be conducted in the fall of 2023. This document is an initial analysis of only the general 2023 Visitor Experience Survey conducted during the month of July.

Question Results

How did you travel to Cape Breton Island?

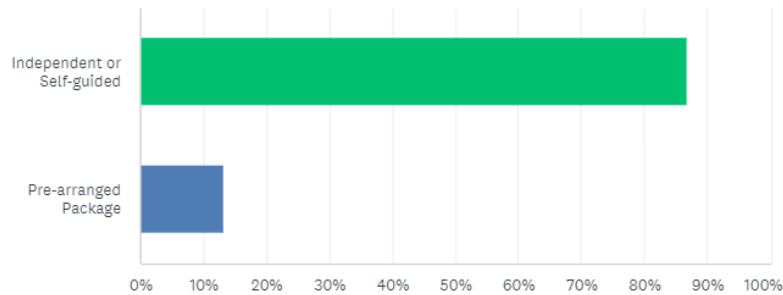
Answered: 210 Skipped: 1



Most visitors surveyed (82%) drove to Cape Breton - Unama'ki. This statistic is impacted by the locations where data was gathered. Passengers on cruise ships are not accurately reflected as they are usually dependent on package excursions provided by their cruise line. More site-specific data was gathered for Cape Smokey, Highland Village, Baddeck, and St. Peter's which can better highlight the main method of travel used by visitors to those specific sites.

Would you describe yourself as an independent traveler who chooses their own destinations or a part of a pre-arranged package tour?

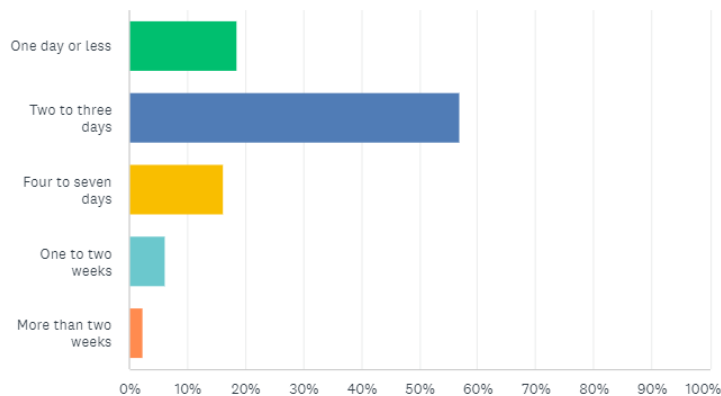
Answered: 83 Skipped: 128



Most travelers (86.8%) to Cape Breton - Unama'ki explore the island on their own. Only 13.3% of travelers consider themselves part of a package tour. The percentage of visitors who visited Cape Breton Island on a package tour who did not arrive by ship is 1.4%. Of those who did come to Cape Breton Island on a ship, boat, or cruise line, 23% described themselves as independent or self-guided travelers while 77% described themselves as part of a pre-arranged package tour. This question was not answered by the participants from St. Peter's, as their paper version of the survey did not contain the question. As a result, the demographics for this question are not consistent with other survey questions and this result has a lower level of reliability than other questions in this survey.

How long have you been on Cape Breton Island?

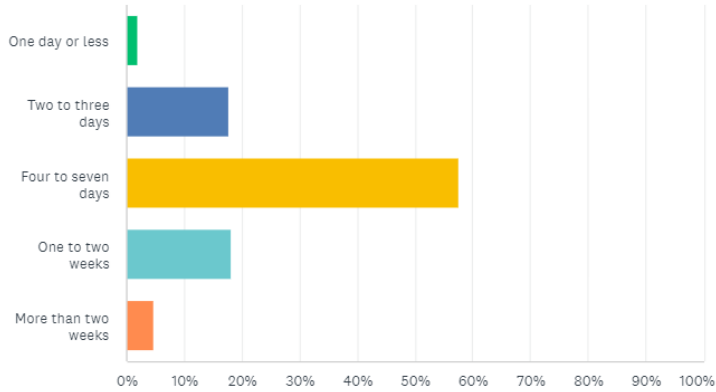
Answered: 211 Skipped: 0



This question allows us to separate out the experiences between visitors who have only been on Cape Breton - Unama'ki for a short period of time from those who have spent a greater amount of time on the island. At the time of being surveyed, most participants were on the island for two to three days.

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

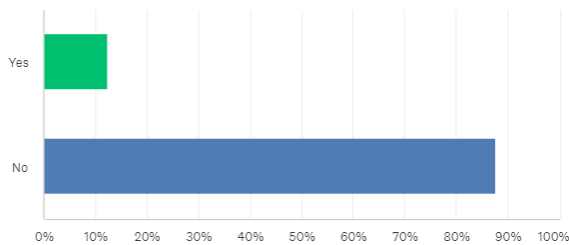
Answered: 210 Skipped: 1



Over half (57.62%) of the survey respondents plan to stay on the island between four and seven days. 22.8% of respondents plan to stay on the island for a week or more.

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

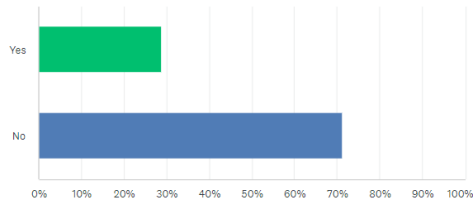
Answered: 210 Skipped: 1



Of the 210 visitors who participated in this survey question, only 12.38% of reported encountering businesses that they would have visited but were closed. On initial examination, it would appear that operating times for Cape Breton businesses are having a minimal impact on visitor experiences.

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

Answered: 52 Skipped: 0

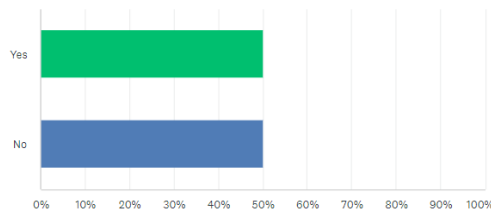


ANSWER CHOICES	RESPONSES	
Yes	28.85%	15
No	71.15%	37
TOTAL		52

However, filtering out visitors who only recently arrived on the island from visitors who have been on the island for four or more days, the percentage of visitors who indicate that they had encountered businesses that they would have visited but were closed more than doubles to 28.9%.

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

Answered: 18 Skipped: 0

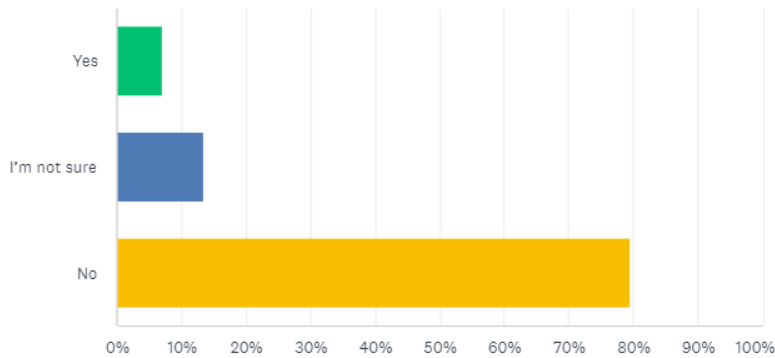


ANSWER CHOICES	RESPONSES	
Yes	50.00%	9
No	50.00%	9
TOTAL		18

Furthermore, for visitors who have been Cape Breton - Unama'ki for a week or more, 50% indicate that they have encountered businesses that they would have visited but were closed. The longer a visitor has been on Cape Breton - Unama'ki, the more likely they are to have been impacted by limited operating times for businesses (perhaps because of shortages in staff and labour).

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

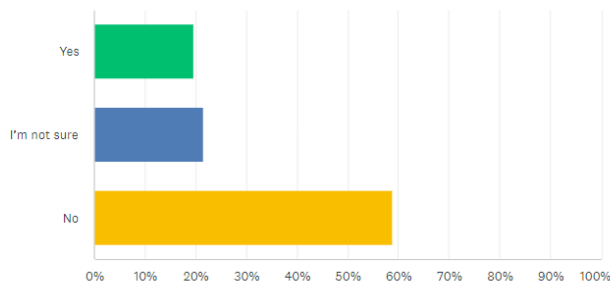
Answered: 210 Skipped: 1



At places that are open, visitors may notice limited or slow service at restaurants, hotels, shops, or attractions and attribute this to a lack of staff. When visitors were asked specifically about shortages in staff and labour, almost 80% of total respondents did not feel that they were impacted by a lack staff. Only 7% felt they were impacted and 13% were unsure if they were impacted or not.

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

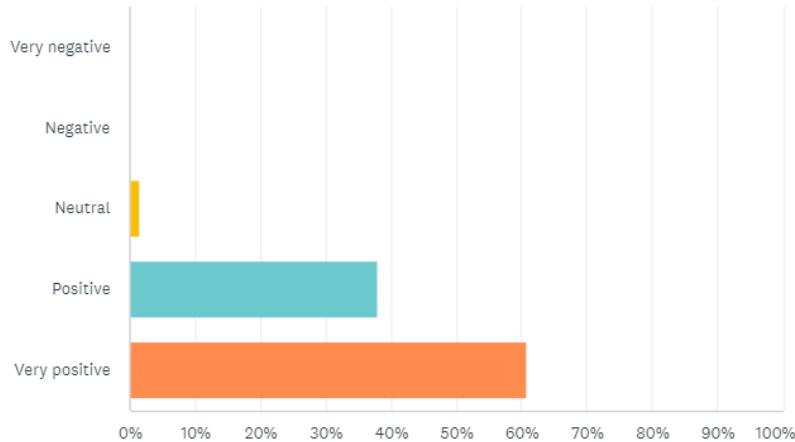
Answered: 51 Skipped: 1



As with business being closed, perceptions of a lack of staff were impacted by the amount of time the visitor had been on Cape Breton Island. When filtered for visitors who have been on the island for four or more days, there is more recognition of staff shortages. Over 40% felt that they either were or may have been impacted by a lack of staff.

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

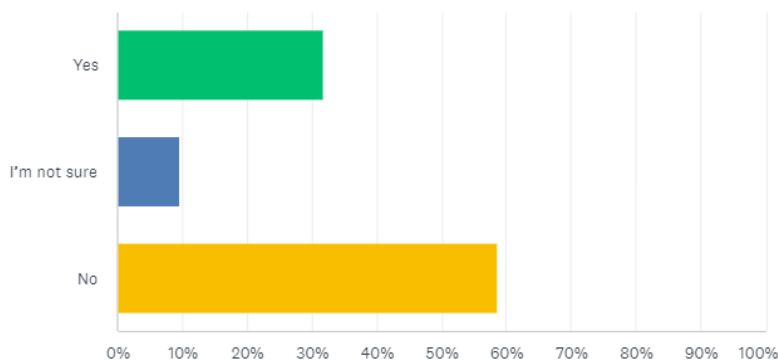
Answered: 211 Skipped: 0



Visitors are happy with the customer services on Cape Breton - Unama'ki. As the results are filtered for visitors who have been on the island for longer, the results become more positive. 73% of visitors who have been on the island for four or more days reported that their customer services experience was “very positive”.

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

Answered: 208 Skipped: 3

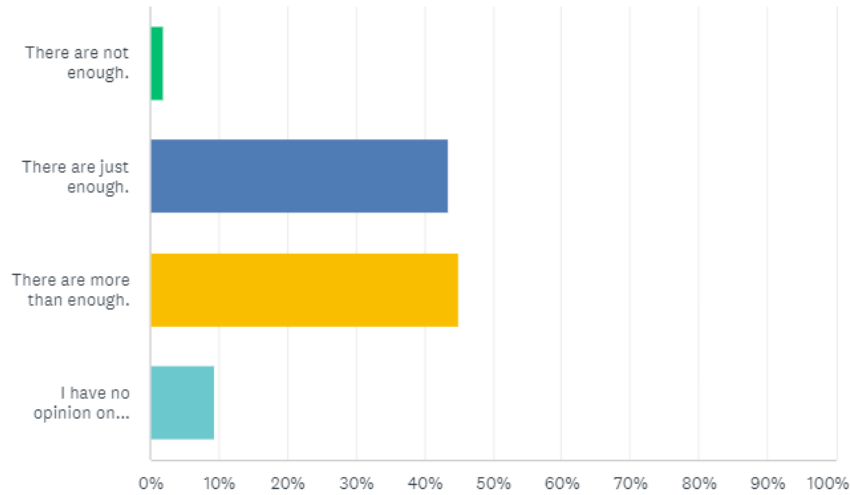


For all visitors to Cape Breton - Unama'ki, almost one-third have participated in an Indigenous tourism experience. For visitors who have been on the island for four or more days, almost half (48%) have participated in an Indigenous tourism experience and the same percentage have not. Interestingly, when focusing on visitors who have been on the island for a week or more, the percentage of visitors

who have participated in an Indigenous tourism experience decreases to 37.5%. For only those visitors who have been on the island between four and seven days, over half (52.9%) have participated in an Indigenous tourism experience.

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

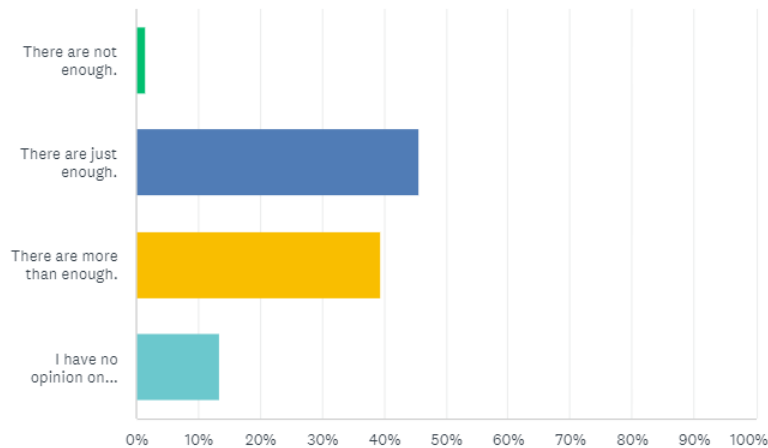
Answered: 211 Skipped: 0



The clear majority of survey participants feel that there are either just enough tourism attractions on Cape Breton - Unama'ki or there are more than enough (88.6%). Just under 2% feel that there are not enough tourism attractions. This remains relatively constant regardless of the amount of time survey participants have been on the island.

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

Answered: 210 Skipped: 1

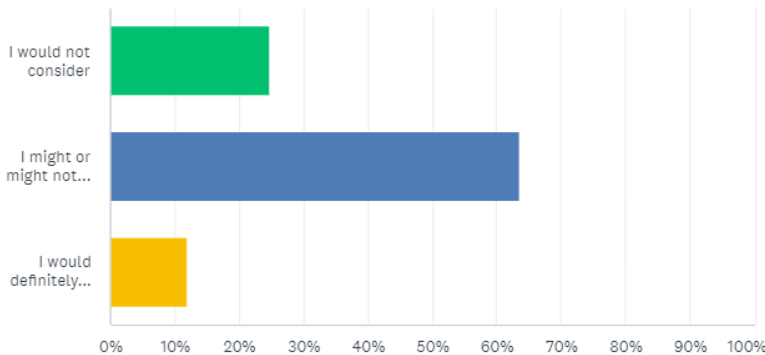


The results when asking about the number of *adventure tourism activities* does not differ significantly from the results when asking about the number of *tourism attractions*. It may have been advisable to include an age range demographic question to determine if visitors in the younger age brackets are more interested in increasing the number of adventure tourism activities.

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

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

Answered: 211 Skipped: 0

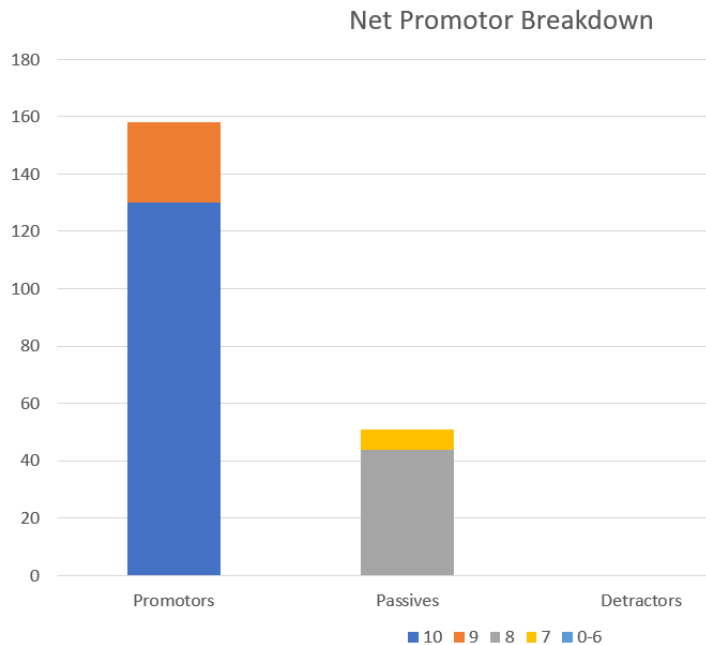


ANSWER CHOICES	RESPONSES
I would not consider	24.64% 52
I might or might not consider	63.51% 134
I would definitely consider	11.85% 25
TOTAL	211

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

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

On a scale of 1-10, how likely are you to recommend visiting Cape Breton Island to a friend or colleague?



For the Net Promotor Score, visitors are asked to rate on a scale of 1-10 the likelihood for them to recommend visiting the destination to a friend or colleague. Respondents who select 9 or 10 are considered promoters. Respondents who select 7 or 8 are passives, and respondents who select 0-6 are detractors. The Net Promotor Score is calculated by subtracting the percentage of detractors from the percentage of promoters. In July, 158 survey respondents were promoters of Cape Breton, 51 were passives, and there were no detractors. **The Net Promotor Score for general visitors to Cape Breton - Unama'ki is 75.6.** For comparison, other relevant Net Promotor Scores include:

- 2022 Cape Breton Cruise Ship Passengers = 38
- Overall Visitors to Canada = 47
- 2021 Visitors to Saskatchewan = 59
- Ontario Visitors to BC = 63
- 2021 Visitors to British Columbia = 66
- 2021 Visitors to Yukon = 81

Net Promotor Scores between 70 and 100 are considered excellent. The Cape Breton - Unama'ki Net Promotor Score is excellent and compares favorably to the net promotor scores for other destinations.

Conclusion

This report represents a brief glimpse into the experiences and attitudes of visitors to Cape Breton - Unama'ki. The results of this survey (July 2023) should be examined alongside the results for the August



2023 Visitor Experience Survey which contained some alternative questions to broaden the scope of our exploration. Additionally, the data collected using the visitor surveys developed for (and in collaboration with) specific destinations can further illuminate the visitor experience and highlight the concerns and areas of interest for those operators. Taken as a whole, these research projects can give both direction and support to decision making in the Cape Breton - Unama'ki tourism industry.

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