

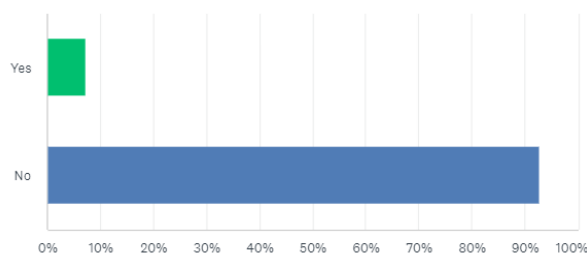
## 2023 Destination Cape Smokey Visitor Experience Survey Results

The 2023 Destination Cape Smokey Visitor Experience Survey was conducted in July and August of 2023 to collect information related to the experiences of visitors to Destination Cape Smokey. The survey contained 15 questions. Data was collected at Destination Cape Smokey by trained graduate students in Cape Breton University's Master of Business Administration in Community Economic Development program. As of September 1<sup>st</sup>, the survey had been completed by 109 participants.

### Survey Results

Do you live in Cape Breton Island?

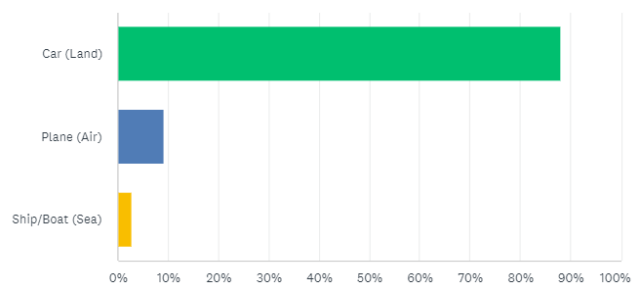
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Over 90% of visitors to Destination Cape Smokey were not from Cape Breton Island - Unama'ki. This may indicate that there is potential for growth in the local market. It may also indicate that further promotion and community building targeted at potential visitors living within a two-hour drive from Destination Cape Smokey could develop a local repeat customer base.

How did you travel to Cape Breton Island?

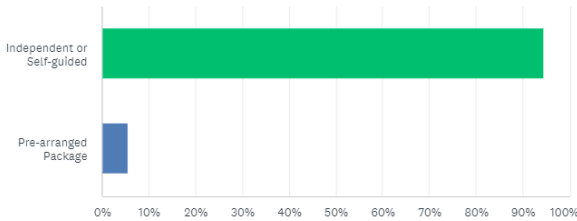
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Almost 90% of the people visiting Destination Cape Smokey arrived on Cape Breton Island - Unama'ki overland. Less than 10% flew into Cape Breton Island - Unama'ki.

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

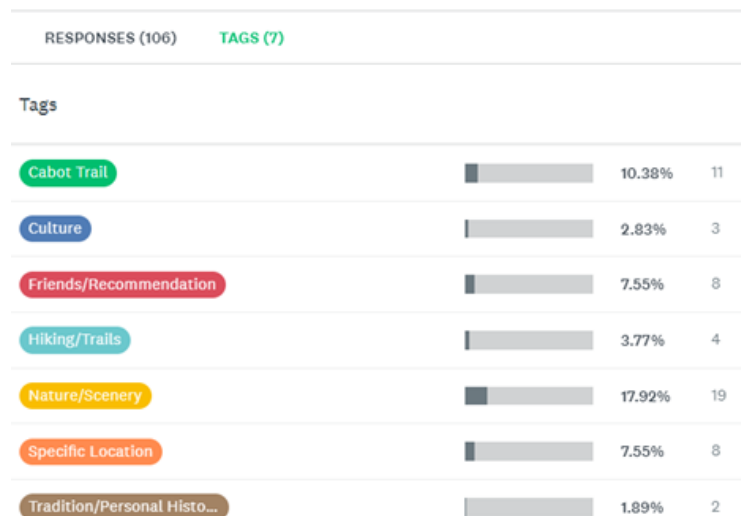
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Almost 95% of visitors to Destination Cape Smokey were independent travellers. Pre-arranged package tours made up only 5.5% of Destination Cape Smokey survey respondents. For July 2023 Cape Breton Island - Unama'ki as a whole, pre-arranged package tours made up 13.3% of visitors. This may indicate potential growth for package tours, and it may be advisable to explore partnerships with tour companies. It is also possible that since visitors on package tours tend to all arrive in a large group, it was not possible to capture an accurate proportion of these visitors. However, since that issue would have equally affected the capture rate of package tour visitors at all locations, most likely Destination Cape Smokey has fewer visitors who are on package tours than other Cape Breton tourism destinations.

What attracted you to Cape Breton as a destination?

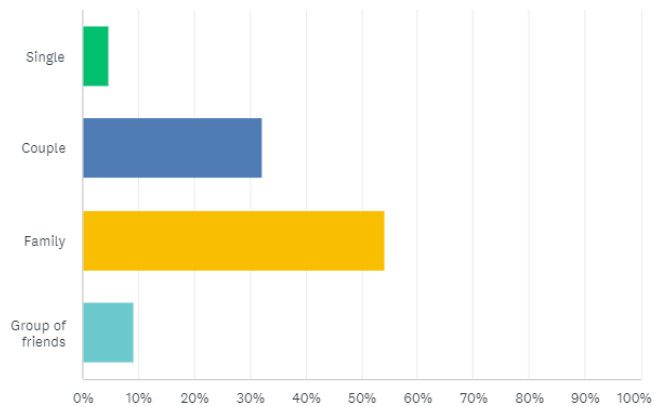
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Survey participants were asked an open-ended question regarding what attracted them to Cape Breton. The most common answers given (17.9%) had to do with the natural beauty of the island. The second most common answer was the Cabot Trail, which could be considered related to the island’s scenery and beauty. Tied for the third most common answer was visiting a specific location and recommendations or friends.

## How would you describe your travel group?

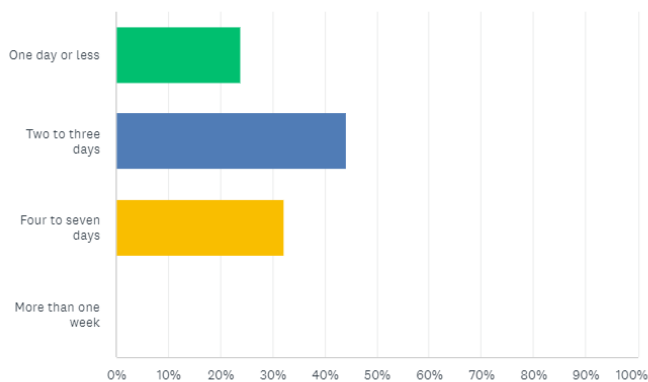
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Families and couples represent the largest types of travel groups to Destination Cape Smokey. It may be worth in the future breaking down what each of these groups is looking for or values at Destination Cape Smokey to ensure that (1) appropriate marketing materials are produced for each group and (2) appropriate amenities and activities are provided for each group. For the families, how old are the children? What types of activities and amenities do they want? What do the families enjoy most about Destination Cape Smokey, what are they wanting more of? For couples, how old are they? Do they tend to be young and adventurous or older and reflective? what do they want from Destination Cape Smokey? Are they looking for activities or quite places to take in views?

## How much of your trip time have you budgeted for the Cabot Trail?

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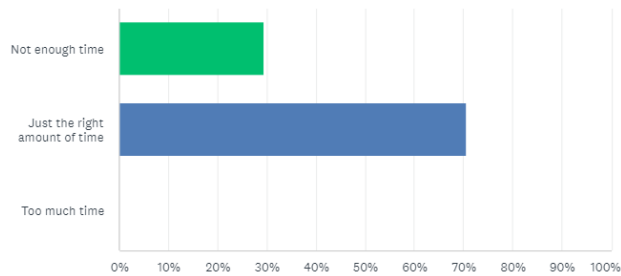


ANSWER CHOICES	RESPONSES
One day or less	23.85% 26
Two to three days	44.04% 48
Four to seven days	32.11% 35
More than one week	0.00% 0
<b>TOTAL</b>	<b>109</b>

Surprisingly, almost a quarter of respondents indicated that they budgeted a day or less for exploring the Cabot Trail. The most common amount of time budgeted for exploring the Cabot Trail was two to three days (44%). Almost one third indicated that they planned to spend four to seven days. No one indicated that they planned for more than one week.

How do you feel about the amount of time you budgeted now?

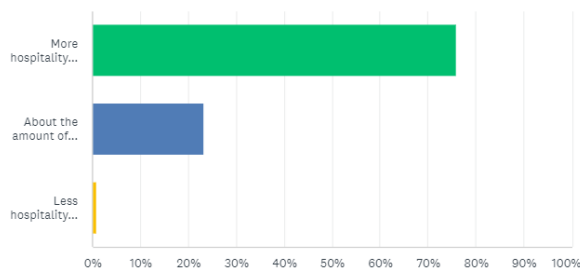
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Almost 30% of respondents indicated that they did not budget enough time for the Cabot Trail. 70.6% felt that they had budgeted the right amount of time. No one indicated that they had budgeted too much time. Of the 32 people who responded that they did not budget enough time, 31% had budgeted a day or less, 62% had budgeted two to three days and 6% had budgeted four to seven days. Interestingly, the group who had budgeted two to three days for the Cabot Trail were twice as likely to feel they did not budget enough time as the group who budgeted only one day or less.

How do you feel about the level of hospitality you have encountered on Cape Breton Island?

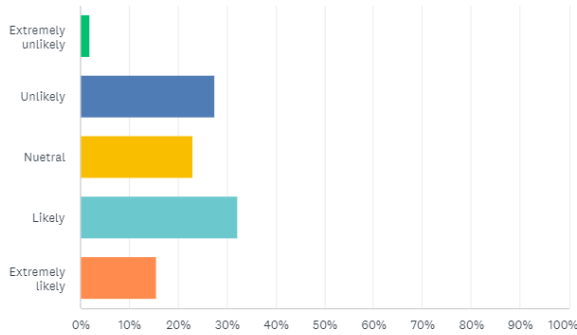
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Three quarters (75.9%) of the visitors to Cape Breton Island - Unama'ki felt that they had received more hospitality than they expected. 23.1% of visitors felt that the hospitality they experienced was what they expected and less than 1% felt that the hospitality was less than expected.

## How likely are you to consider Cape Breton part of your family tradition?

Answered: 109 Skipped: 0

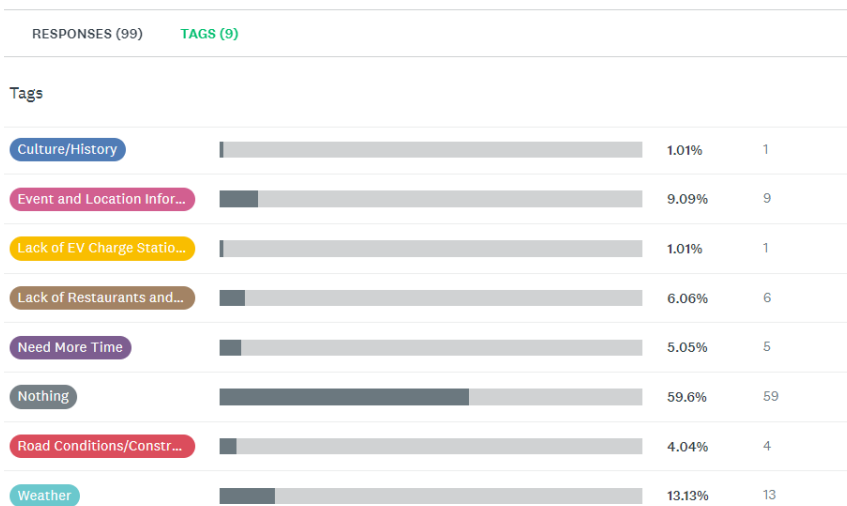


ANSWER CHOICES	RESPONSES
Extremely unlikely	1.83% 2
Unlikely	27.52% 30
Neutral	22.94% 25
Likely	32.11% 35
Extremely likely	15.60% 17
<b>TOTAL</b>	<b>109</b>

When asked about the likelihood of considering Cape Breton a part of a family tradition, responses were mixed. Less than 2% indicated that it would be extremely unlikely, 27.5% indicated that it would be unlikely, 22.9% indicated that they were neutral on the idea, 32.1% indicated that it was likely, and 15.6% indicated that it was extremely likely. This means that almost half (47.7%) of visitors are more likely than not to consider Cape Breton a part of a family tradition. Of the 52 respondents who were likely to consider Cape Breton a part of a family tradition, 46% were traveling as families, 40% were traveling as couples, 9.6% were traveling as a group of friends, and 3.8% were singles.

## What do you wish you would have known before arriving in Cape Breton?

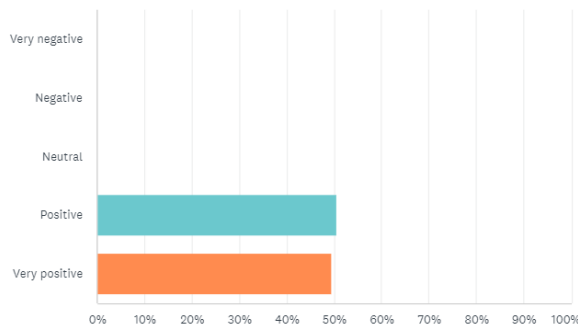
Answered: 99 Skipped: 10



Survey participants were asked an open ended question regarding what they wish they had know before arriving in Cape Breton. Almost 60% of respondents felt that they had all the information they needed. 13% of respondents indicated that they were unprepared for the weather. This often was in reference to the amount of fog that participants encountered. Almost 10% of respondents would have liked more information on locations, activities, and events. For a few respondents (6%), a lack of access to food and a lack of variety of food options was something that they wish they had known about before arriving in Cape Breton.

How would you rate the customer service you have received at Cape Smokey?

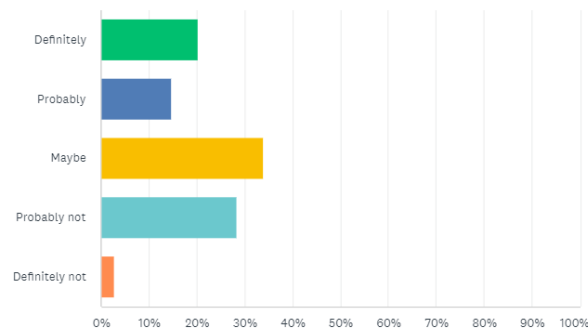
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Survey participants rated their Destination Cape Smokey customer service experience as either positive or very positive. Answers between the two were evenly split.

Would you be interested in participating in an Indigenous tourism experience at Cape Smokey?

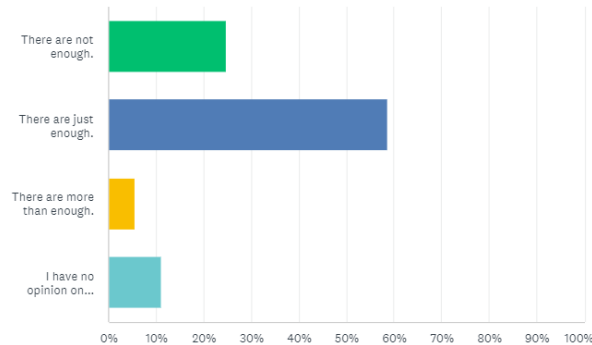
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Approximately 35% of survey participants would be interested in participating in an Indigenous tourism experience while approximately 30% would not be interested in participating. About 34% were non-committal towards the idea of participating in an Indigenous tourism experience.

## How do you feel about the number of activities at Cape Smokey?

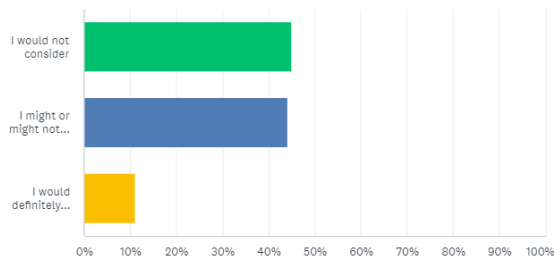
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64.2% of survey participants feel that there are either just enough or more than enough activities at Destination Cape Smokey. About 25% feel that there are not enough activities. Of those 25% who would like more activities, almost 60% are families while one-third are couples.

## How do you feel about visiting Cape Smokey during the winter?

Answered: 109 Skipped: 0



ANSWER CHOICES	RESPONSES
I would not consider	44.95% 49
I might or might not consider	44.04% 48
I would definitely consider	11.01% 12
<b>TOTAL</b>	<b>109</b>

Only 11% of survey respondents would definitely consider visiting Destination Cape Smokey during the winter. 45% of respondents would not consider visiting Destination Cape Smokey during the winter and 44% are undecided and indicated that they might or might not consider visiting during the winter. This indicates that for Destination Cape Smokey to become a four-seasons destination, a substantial investment will need to be made into promotion and advertising to convince the large undecided group that Destination Cape Smokey would make a good winter destination.

### Net Promotor Score

A Net Promotor Score (NPS) is a common method for measuring the attitudes that customers have towards a product or service. NPSs are often used to compare similar products or services, or as a key



performance indicator to show changes in customer attitudes over time. Destination Canada uses Net Promoter Score Rankings as a performance indicator in their 2021 – 2025 Corporate Plan.

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

A total of 109 Destination Cape Smokey visitors participated in the 2023 Net Promoter Score survey question. Of those, 58 (53.2%) were promoters and 3 (2.7%) were detractors. The resulting Net Promoter Score for Destination Cape Smokey visitors was **50.5**.

The Destination Cape Smokey NPS score can be contrasted with the general Cape Breton -Unama’ki visitor NPS. In July 2023 a general visitor experience survey was conducted of visitors to Cape Breton Island - Unama'ki. This survey was conducted at popular tourist destinations across Cape Breton - Unama'ki. The Cape Breton - Unama'ki Visitor Experience Survey was conducted by the same team of Graduate Research Assistants as the 2023 Destination Cape Smokey Visitor Experience Survey. In the July 2023 survey of general visitors to Cape Breton - Unama'ki, 209 participants answered a NPS question. Of those respondents 158 were “Promoters”, 51 were “Passives”, and there were no “Detractors”. This produced a Net Promoter Score for general visitors to Cape Breton - Unama'ki of 75.6.

For further comparison, relevant Net Promoter Scores include:

- 2023 Cape Breton – Unama’ki Cruise Ship Passengers = 37.96
- 2022 Cape Breton Cruise Ship Passengers = 38.36
- 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
- 2023 General Cape Breton Visitors = 75.6

The question often arises, what constitutes a good Net Promoter Score? This will vary depending on the industry. For example, internet service providers have an average Net Promoter Score of -3, while hotels have an average score of 49 and insurance companies have an average score of 74. The 2023 Destination Cape Smokey Visitor NPS of 50.5 is below that of visitors’ reactions to Cape Breton as a whole (75.6) but higher than the NPS for overall visitors to Canada (47).

As Destination Cape Smokey implements changes to services, amenities, activities, prices, and policies, the Net Promoter Score can be used as a benchmark to determine the effects those changes have on customer satisfaction and the likely number of both repeat customers as well as new customers resulting from word of mouth. Net Promoter Scores can also indicate changes in customer demographics, expectations, and values over time.