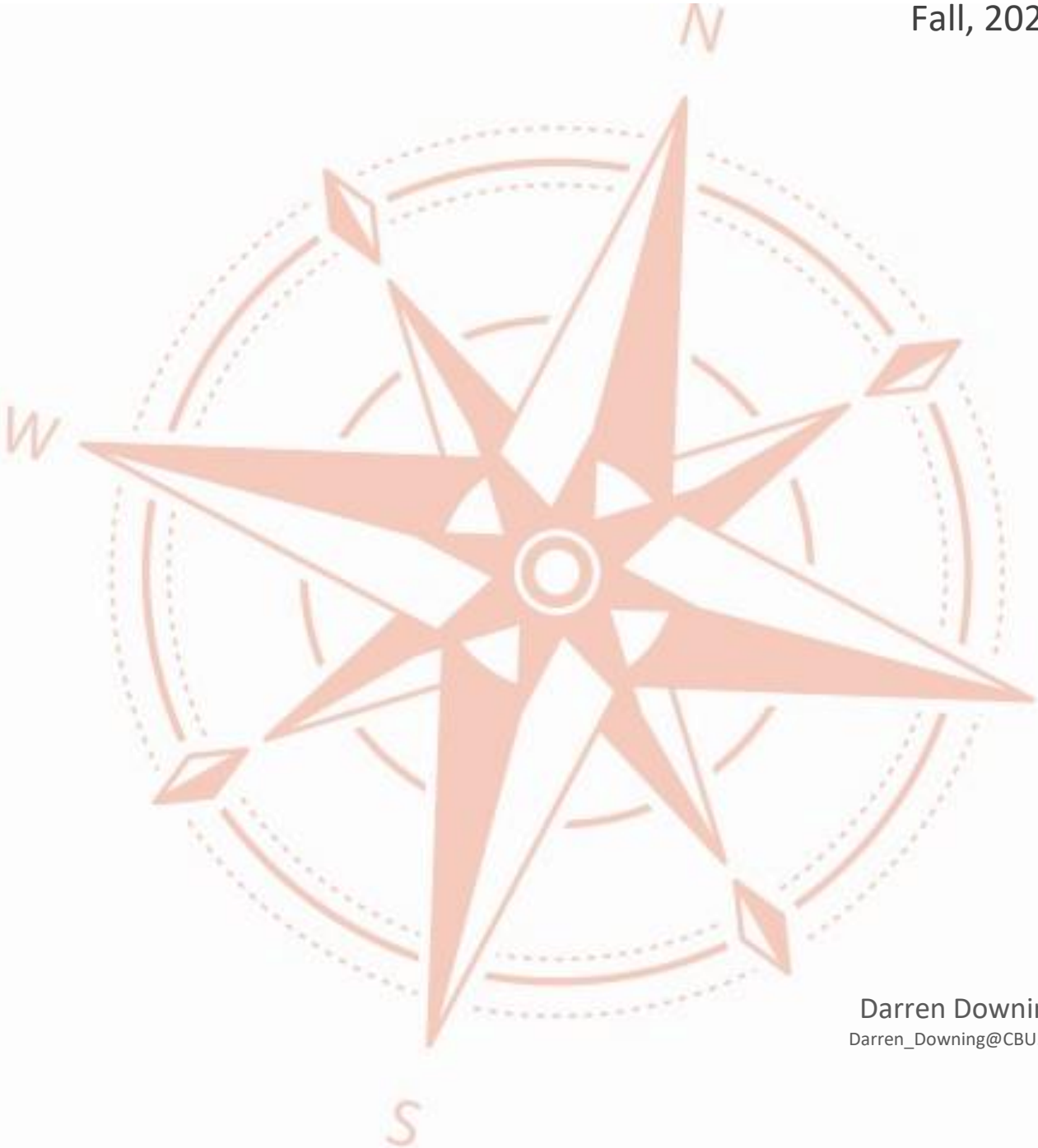


CBITTN RESEARCH REPORT

Fall, 2022



Darren Downing
Darren_Downing@CBU.CA

Contents

Surveys	2
Cruise Ship Passenger Survey	2
Net Promoter Score	2
Tourism Industry Exit Survey	5
Environics	10
Near and Rove	10
Additional Information from Rove	12
Who is Visiting?	12
Popular Times	13
Popular Places	14
Case Studies	18

Surveys

Cruise Ship Passenger Survey

In September and October, cruise ship passengers were asked to participate in a brief survey as they were returning to their ship. The surveys focused on their perceptions and responses to, workforce shortages in the tourism industry. In total, 81 passengers were surveyed. This is slightly below the 100 participants desired for acceptable reliability. Key survey questions are listed below.

Do you feel your visit to Cape Breton was impacted by shortages in staff and labour at places you visited? (81 total responses)

- Yes – 6 (7.4%)
- No – 75 (92.6%)

(New Question) During your travels in Cape Breton, did you encounter businesses that you would have visited but were closed? (12 total responses)

- Yes – 3 (25%)
- No – 9 (75%)

Do you feel you have experienced disruptions due to labour shortages in other ports of call? (79 total responses)

- Yes – 7 (8.9%)
- No – 66 (83.5%)
- NA – 6 (7.6%)

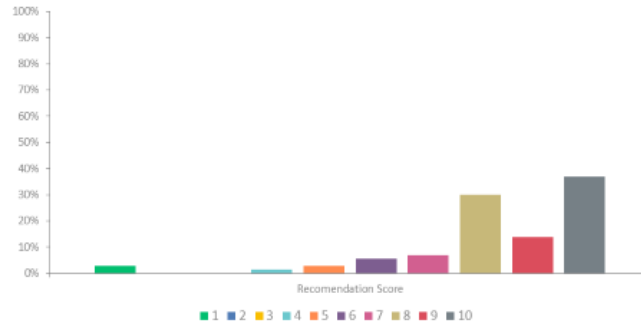
The results of the survey suggest that cruise ship passengers are, for the most part, unaware of disruptions to tourism services as a result of labour shortages. The number of passengers noticing labour shortages in other ports of call was similar to the number that were aware of them on Cape Breton Island, suggesting that the tourism experience is not drastically different in relation to workforce issues on Cape Breton compared to other tourism destinations. The survey results also indicate that tourism operators are successfully giving the appearance of an adequate workforce. This survey does not capture the cost of maintaining that appearance, which may include employee burnout, financial losses, and degraded work-life balance.

Net Promoter Score

The cruise ship passenger survey contained a Net Promoter Score question. The Net Promoter Score (NPS), developed by Frederick Reichheld and Bain & Company in 2002, is a metric that can be used to measure the intention to recommend a travel destination to friends and family. It is also an indicator of overall satisfaction with travel or customer experiences. NPS is regarded by researchers as the question that best predicts the future growth of customer centric businesses like those in the tourism industry.

Q6: On a scale of 1-10, how likely are you to recommend visiting Cape Breton Island to a friend or colleague?

Answered: 73 Skipped: 1



	1	2	3	4	5	6	7	8	9	10	TOTAL	WEIGHTED AVERAGE
Recommendation Score	2.74	0%	0%	1.37	2.74	5.48	6.85	30.14	13.70	36.99	73	8.37
	2			1	2	4	5	22	10	27		

Cape Breton Island NPS for Cruise Ship Passengers = **38.36**

How is the score calculated?

Net Promoter Scores are the result of customers answering the question, “How likely are you to recommend X to a friend or colleague?” using a 10-point scale. Respondents who answer 9 or 10 are considered promoters. Respondents who answer 1 to 6 are considered detractors. The Net Promoter Score is calculated by taking the percentage of promoters and subtracting the percentage of detractors. A net promoter score can range anywhere from -100 (if there are no promoters) to +100 (if there are no detractors).

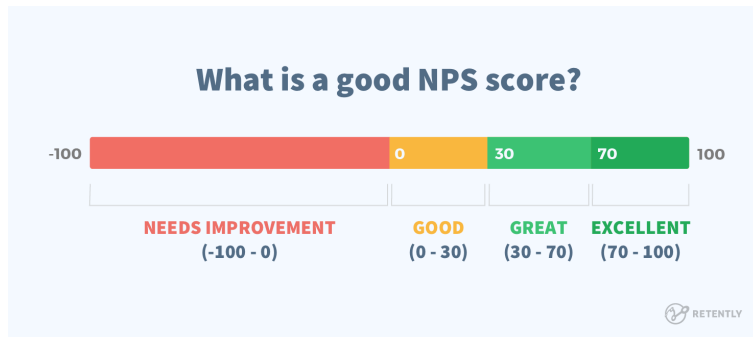


NPS = %PROMOTERS - %DETRACTORS



What is a good Net Promotor Score?

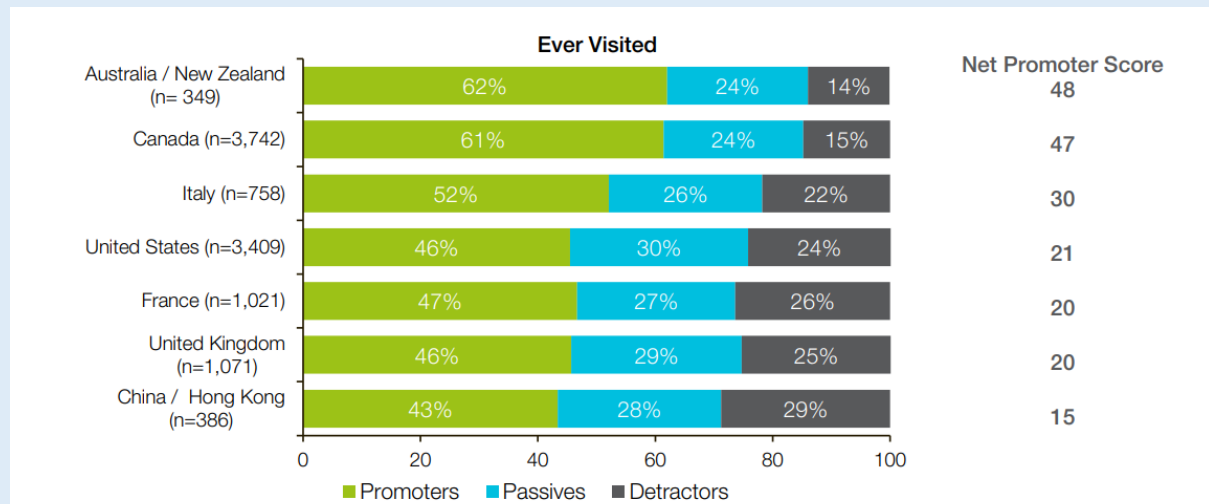
There is no one answer to this question. Net Promotor Scores are most often either compared to the scores from similar industries or businesses or they are viewed in the context of changes to a Net Promotor Score over time. If comparing the Cape Breton NPS to other NPS scores, it is important to compare it with similar industries. The average NPS for digital marketing agencies (60) is very different than the average NPS for airlines (11.9). In general, net promoter scores between 0 and 30 are considered good, 30-70 is great, and above 70 is excellent. Cape Breton’s Cruise Ship Passenger Net Promoter Score of 38 would generally fall into the great category.



As was mentioned, one way to view a Net Promoter Score is by comparing it with the Net Promoter Scores from similar industries or products. Destination Canada compared the Canadian Net Promoter Score (47) to that of other destinations who published their NPS.

From Destination Canada:

There is considerable advocacy potential in the domestic market, with Canadians awarding a Net Promoter Score of 47, just 1 point below top-ranked Australia/New Zealand. Canadians can be encouraged to promote the country’s tourism assets to their fellow Canadians.



Q3: Whether you have visited or not, how likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?

(Source: [https://www.destinationcanada.com/sites/default/files/archive/2012-12-01/Intelligence GlobalTourismWatch Canada 2012 EN.pdf](https://www.destinationcanada.com/sites/default/files/archive/2012-12-01/Intelligence%20GlobalTourismWatch%20Canada%202012%20EN.pdf))

Likewise, Cape Breton Island could compare their Net Promoter Score with the NPS tourism scores from other Canadian destinations.

From Tourism Saskatchewan:

Tourism Saskatchewan began measuring NPS in June 2021 to accomplish three key objectives:

1. Identify Saskatchewan's best promoters
2. Track satisfaction with Saskatchewan as a destination over time
3. Shift priorities towards giving people a more satisfying visitor experience

Tourism Saskatchewan collected over 3,600 responses within the first three months of the survey.

Saskatchewan residents who visited other parts of the province accounted for 87 per cent of responses.

As of September 1, 2021, Saskatchewan's NPS amongst non-resident travellers is **59**. Although considered an excellent score, it falls short of competitor destinations like **British Columbia (66)** and **Yukon (81)**. Lack of dining options in parts of the province, transportation (specifically poor road conditions and lack of rest stops) and ease of booking were cited by out-of-province visitors as issues that diminished their travel experience in Saskatchewan. (<https://business.tourismsaskatchewan.com/en/blog/net-promoter-score>)

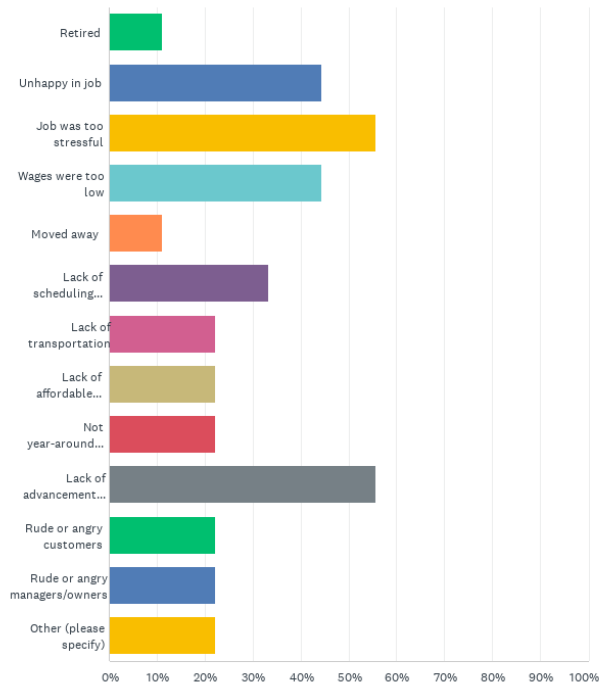
Here, Tourism Saskatchewan promotes their NPS score as 59. They say that this score is from the responses of "non-resident travellers". However, they also stated that 87 per cent of responses to their Net Promoter Survey were from "Saskatchewan residents who visited other parts of the province." It is unclear if the final NPS score included the responses from the interprovincial tourists. Similarly, the methodology to gather the NPS for British Columbia (66) and Yukon (81) was not discussed. The current NPS score for Cape Breton Island only represents the NPS score for cruise ship passengers. Therefore, it cannot be effectively compared to the general NPS for other Canadian tourism destinations. It would be interesting to compare the Cape Breton cruise ship NPS to the NPS score for other type of travelers within Cape Breton to see how the experiences of cruise ship passengers compares with that of other travelers.

Tourism Industry Exit Survey

The Tourism Industry Exit survey is intended to be completed by individuals who worked in the Cape Breton Island tourism sector in the past but have since left the tourism industry. The purpose is to identify factors that lead to the decision to leave the tourism sector as well as factors that could have convinced them to have remained in the sector or return to it in the future. This survey has been distributed to targeted known individuals who have left the Cape Breton Island tourism sector. Since the available pool of potential known participants for this survey is relatively small, the target final number of participants is hoped to be about 30. Currently, the survey has 9 respondents and so the following data and analysis is preliminary.

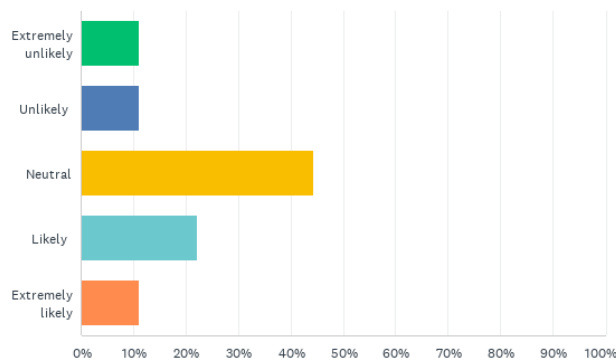
About half of the initial respondents fall within the 26- to 35-year-old age range. Two respondents are between 36 and 45 and two are over 56 years old. About half worked in the travel services industry while two worked in accommodation and lodging.

Q5 Why did you leave the tourism sector? (Tick all that apply)



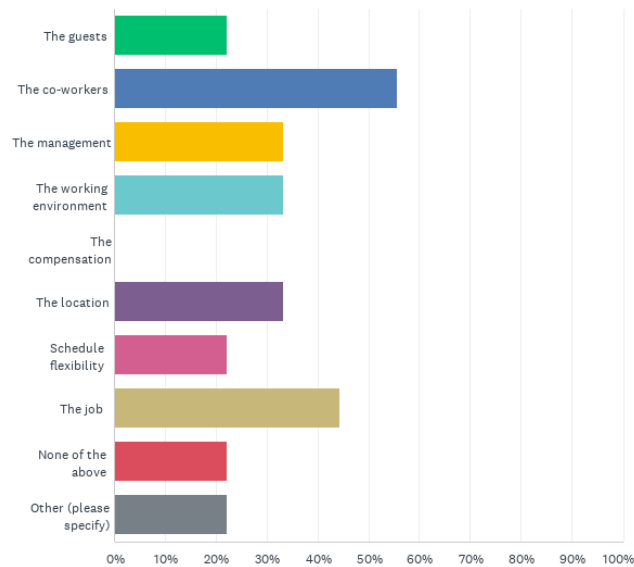
The most cited factors that led to a decision to leave the Cape Breton tourism sector are job related stress, low wages, and a lack of opportunities for advancement. However, all other factors were also selected by at least one participant, suggesting that a large variety of negative issues often led to the decision to leave the tourism sector.

Q6 How Likely are you to return to the tourism sector in the next 5 years?



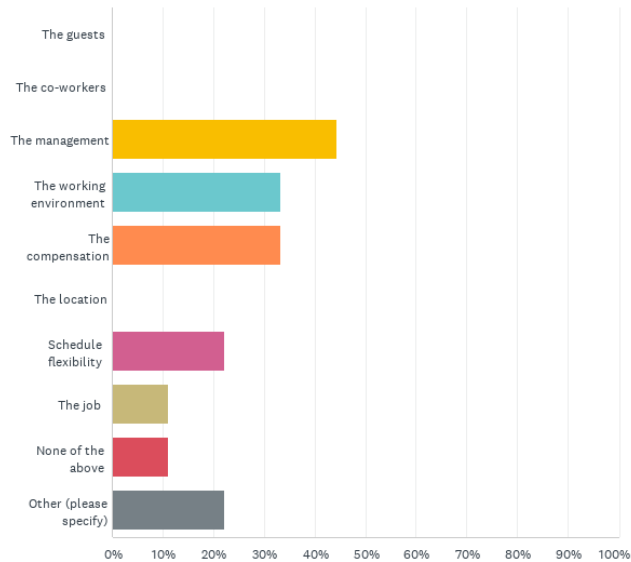
The majority of respondents were open to returning to the tourism sector within the next five years suggesting that there does exist a pool of experienced potential labour that could return to the Cape Breton tourism sector.

Q7 What were your favorite parts of working for the tourism sector? (Tick all that apply.)



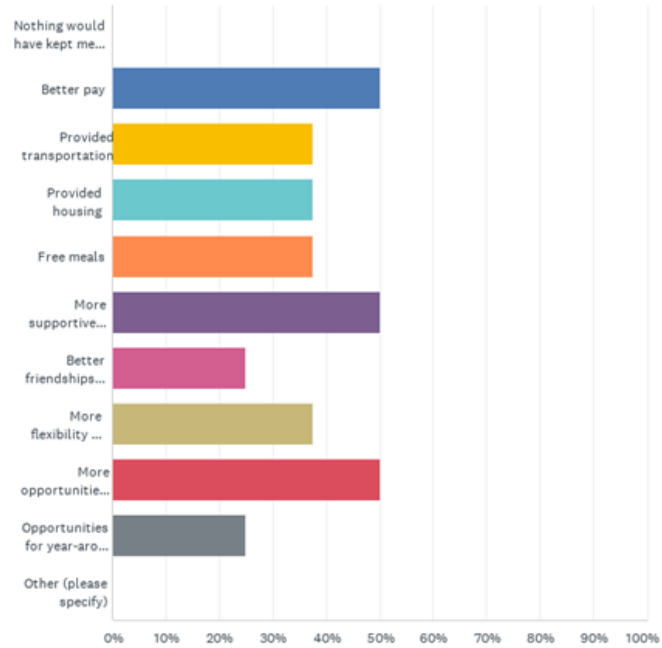
Co-workers, the job, and the location were all cited as being highlights of Cape Breton tourism sector employment. The most often cited highlight of working in the Cape Breton tourism sector was the co-workers. This suggests that enhancing opportunities for friendships and bonding experiences between colleagues would be a likely strategy to decrease employee attrition.

Q8 What were your least favorite parts of working in the tourism sector? (Tick all that apply.)



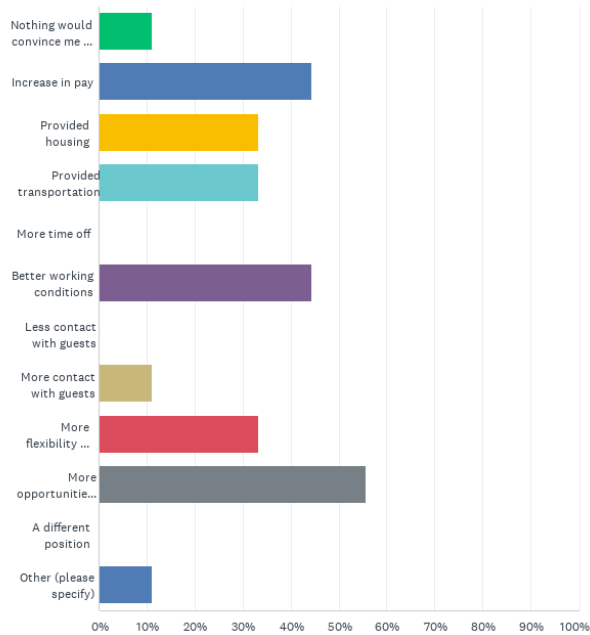
Management was most often cited as a least favorite aspect of working in the tourism sector. This was followed by working environment and compensation. This suggests that another potential method to decrease attrition may be to enhance management/employee relations.

Q9 What would have kept you from leaving the tourism sector? (Tick all that apply.)



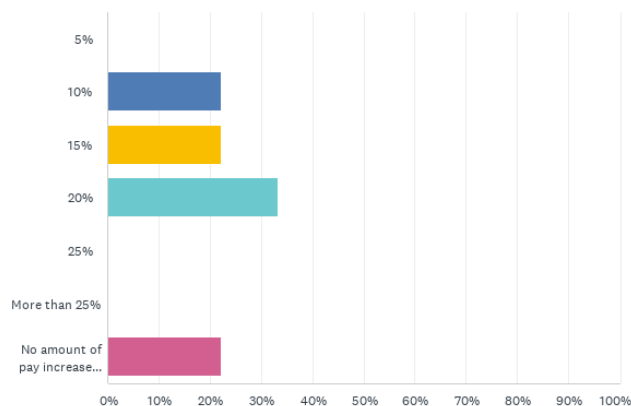
Many factors were identified as potential motivators for remaining in the tourism sector. So far, the three most commonly cited are better pay, more supportive managers, and more opportunities for advancement. This again reinforces the idea that resources invested into management/employee relations may greatly impact employee turnover.

Q10 What would convince you to return to the tourism sector? (Tick all that apply.)



An increase in opportunities for advancement is the most commonly selected factor that would convince someone who has left the tourism sector to return. This was followed by an increase in pay and better working conditions.

Q11 How much of a raise in your previous pay would you require to return to your previous job in the tourism sector?



To attract ex-tourism employees back to the industry solely through an increase in pay would require between a 10% and 20% pay increase for those who would be enticed by financial motivation. It should be determined if efforts towards team building, improving management/employee relations, and

providing opportunities for advancement would have similar results with a lower financial burden to the operator.

Environics

DCBA has purchased a subscription to selected tools and services offered by Environics Analytics. The data that Environics provides is useful for determining the type of people who visit a place (who are the customers) and where additional potential customers can be found that are similar to the most common and valued current customers. Environics breaks down the population into 66 distinct groups based on factors such as income, family status, culture, age, ethnicity, language, type of dwelling, values, education, and community. The main application of this information is for developing marketing and promotional strategies.

- DCBA has not paid the extra cost to use the Environics collected data.
 - They can import purchased data from other sources.
 - They can import customer data from operators or tourism centers who gather postal addresses and other relevant information.
 - Environics systems can be used without importing data to locate and describe people who live in specific areas of Canada and (to a lesser extent) the US.
- CBITTN has received detailed visitor data from Near to be used in the Environics system.
- Ankit is formatting the file so an analysis can be made that includes seasonal travel information.

Near and Rove

Rove Marketing uses data from their partner Near to identify where people are going, how long they are staying, and where people are visiting from for a destination. They give useful information about the destination and the behaviors of the people visiting attractions within that destination. DCBA has supplied Rove with a list of 50 geofenced areas and attractions within Cape Breton Island. This data can be easily displayed and shared in a dashboard powered by another of their partners, Domo.

Jennifer Griswold at Rove Marketing highlighted the below information about Cape Breton:

1. *Average length of stay - 41.5 hrs for the whole island*

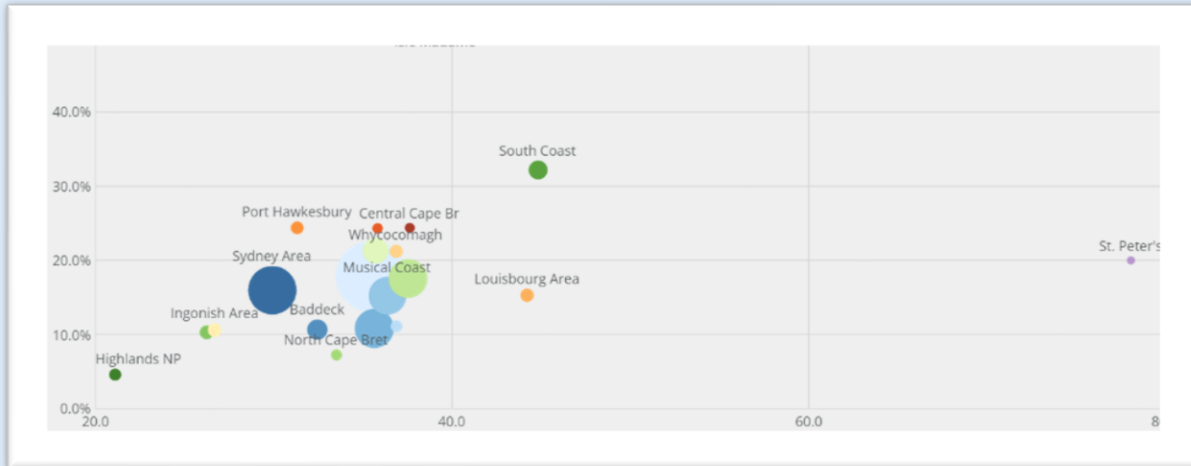
- *Highlands NP - 23.0 hrs*
- *Cabot Trail = 32.7 hrs*
- *Bras dOr Lake - 31.8 hrs*
- *Musical Coast - 32.4 hrs*
- *Sydney Area - 34.9 hrs*
- *Sydney Marconi - 37.6 hrs*

This tells me that visitors have a primary base - but are still getting out and exploring the island.

2. *International tourists are much more likely to stay overnight in Sydney Marconi (62.1%) compared to the Highlands NP (28.6%). [Note (DD): Could this be impacted by cruise ship passengers who stay on the ship overnight?]*

It looks like Quebeckers spend the most time in Highlands NP at about 28 hours (72% staying overnight). Any guesses on why international tourists are less likely to overnight?

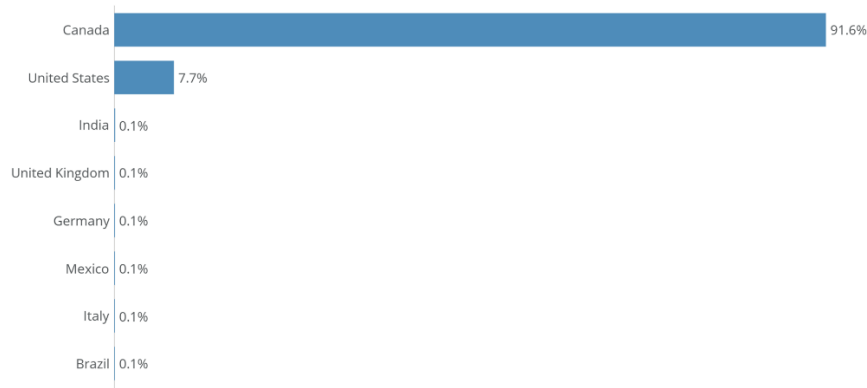
3. *International travelers are staying longer in The Musical Coast region (48.4) than in Sydney Marconi (31.2).*
4. *Most monitored US devices are going to Sydney Marconi (17.8%) and Bras dOr Lake (10.9%) and Cabot Trail (11%), but the ones that are going to the South Coast are staying longer and more likely to be repeat visitors. This is in the chart below.*



Additional Information from Rove

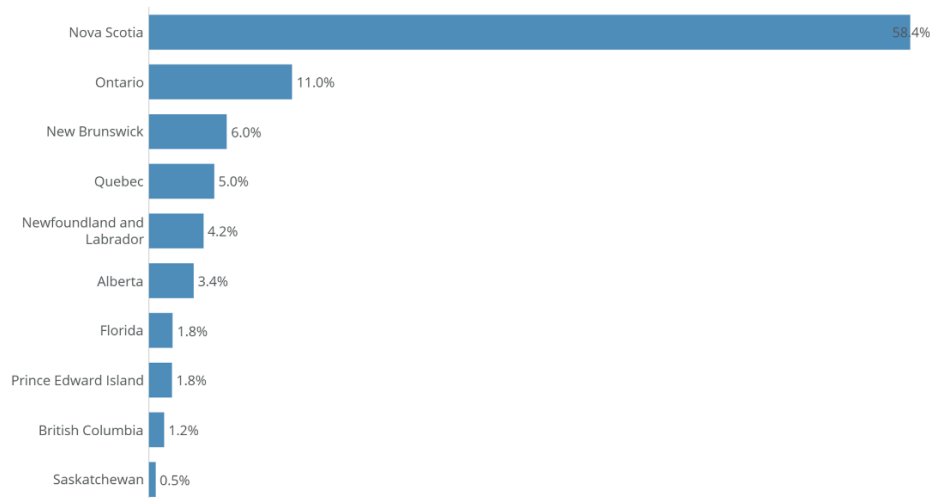
Who is Visiting?

Common Evening Country (2022)



The common evening country represents the home country for non-Cape Breton residents visiting Cape Breton Island.

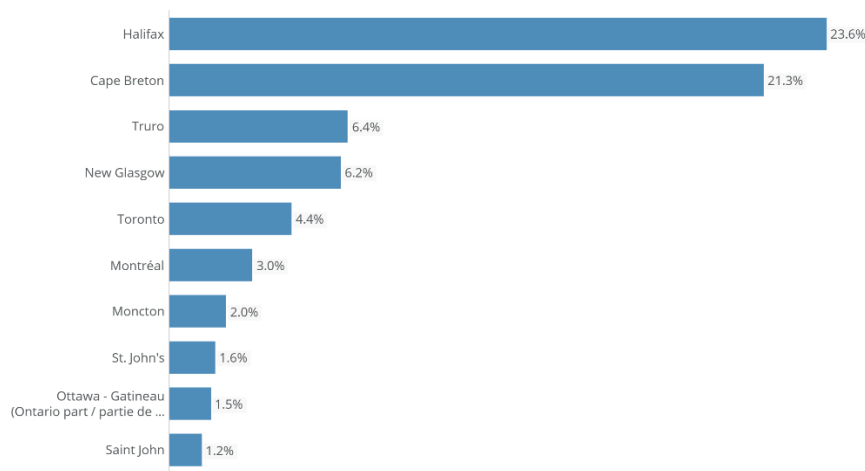
Common Evening Province (2022)



POWERED BY 

The common evening province shows the origin by province or state for visitors to Cape Breton Island. As would be expected, Nova Scotia residents who don't live in Cape Breton Island are the most common visitors. The US state with the highest percentage of visitors is Florida, which makes up the same percentage of visitors as Prince Edward Island. However, this is likely heavily influenced by Canadian "snowbirds" who live in Florida for the colder months and return to Cape Breton for the Summer. The Rove system can be adjusted to better identify and isolate this migratory behavior and separate it from more typical tourist populations.

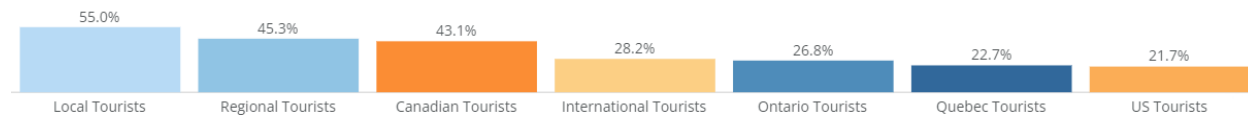
Common Daytime Metropolitan Area (2022)



The Common Daytime Metropolitan Area chart indicates the city where visitors to Cape Breton most likely work. According to this data, 21.3% of tourists in Cape Breton also work in Cape Breton. This may be a result of individuals who live in Antigonish or Guysborough County but work (and travel) in Cape Breton.

Percent of Tourists that are Repeat Visitors (2022)

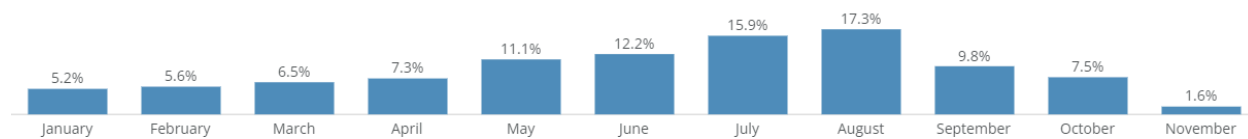
Percent Repeat Visitors: 41.1%



This chart shows the percentage of repeat visitors for 2022 by tourist origin. Interestingly, US tourists are less likely to be returning tourists than international tourists.

Popular Times

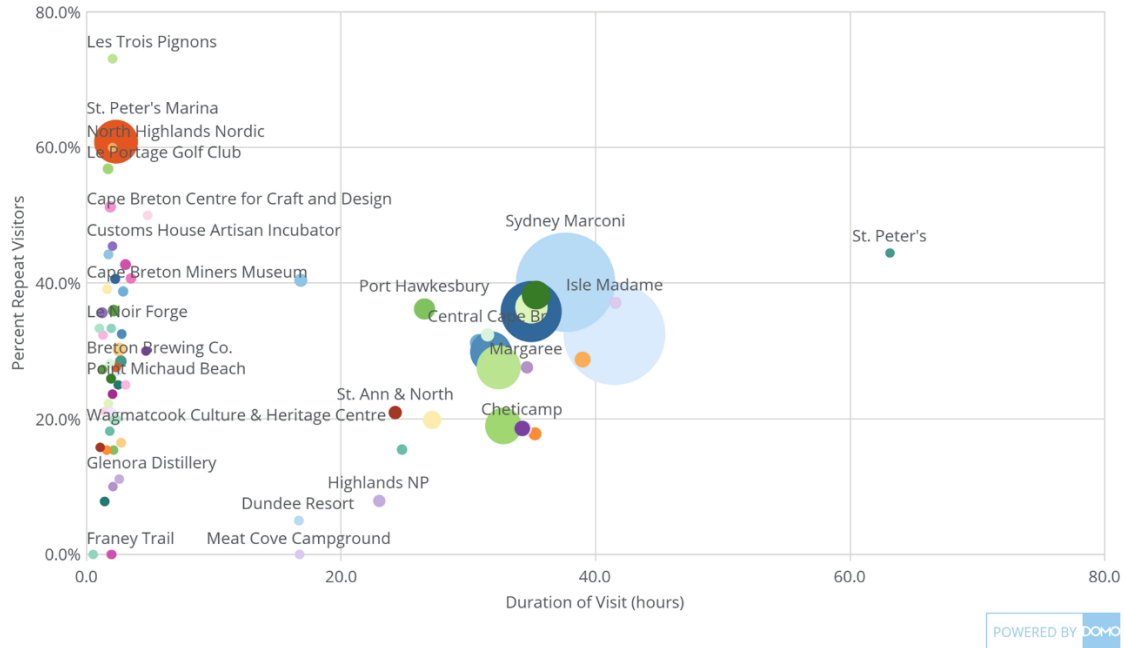
Most Popular Months to Visit (2022)



As expected, summer months are the most popular times to visit Cape Breton. This chart can work as a benchmark to measure the effectiveness of four-seasons campaigns and initiatives with 2022 functioning as a baseline.

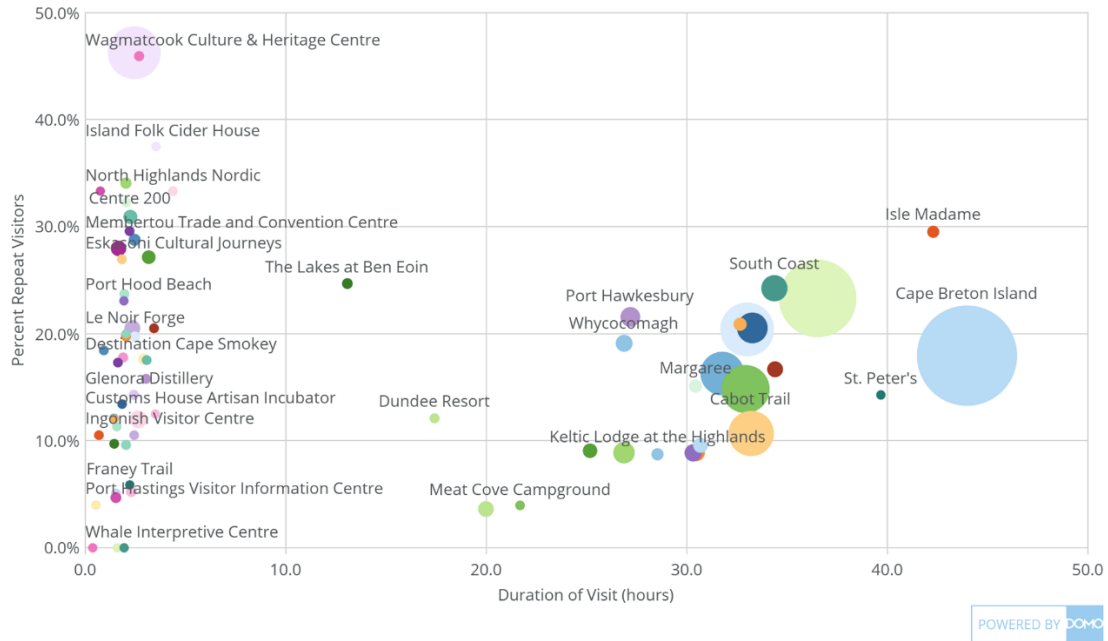
Popular Places

Most Popular Places – At a Glance Comparison (2022)



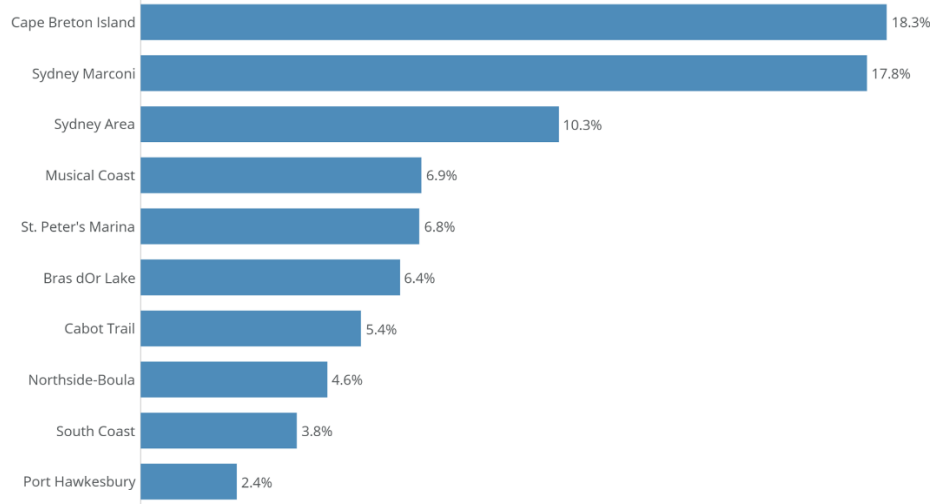
The above chart lists the geolocated places and indicates the percentage of repeat visitors as well as the average length of time that tourists spend at those locations in 2022. This can be compared with the 2019 data below.

Most Popular Places – At a Glance Comparison (2019)



When comparing the two charts, please note the slight difference in scale for the X and Y axis.

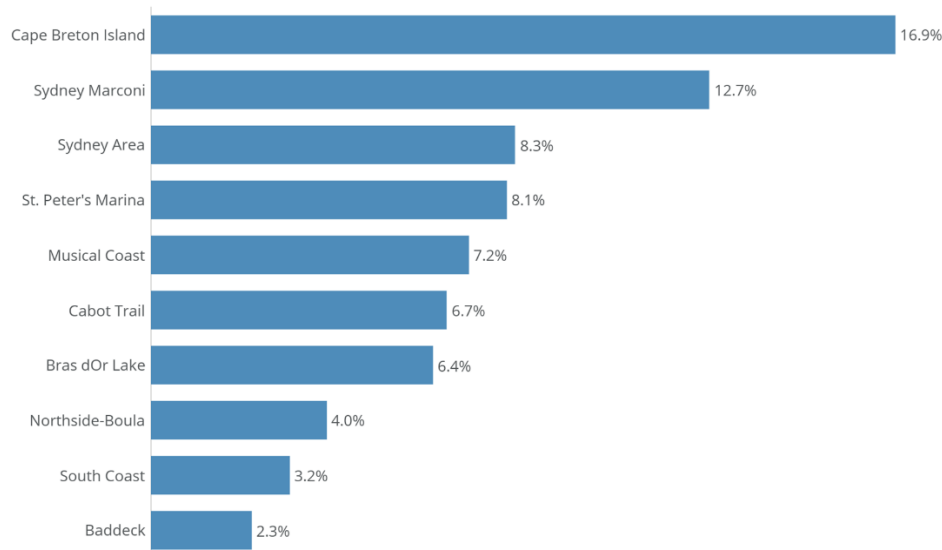
Most Popular Places (2022)



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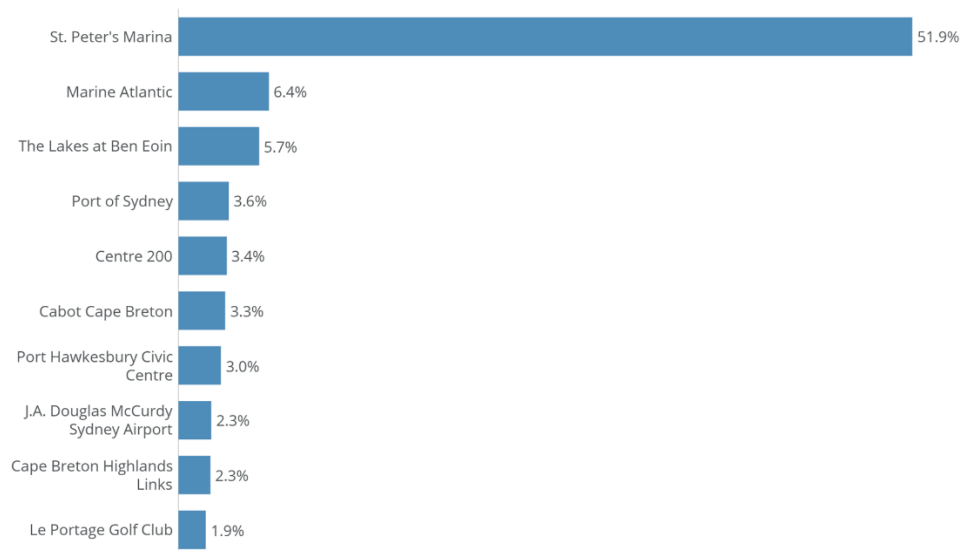
The most popular places (2022 and 2019) show where tourists were most likely to visit. I requested clarification from the Rove Marketing representative regarding what the “Cape Breton Island” entry represents. Jennifer Griswold responded, *“In the chart - the 18.3% represents a percentage of the total in the chart. In this case -- you're counting Cape Breton Island in addition to every single poi in the platform. Devices go here and there, and as they move around the island and they are getting counted at each polygon they stop. To say it in research terms, without applying filters you're looking at a not mutually exclusive list of all the polygons.”*

Most Popular Places (2019)



POWERED BY 

Tourism Experiences by Popularity (2022)



The 2022 Tourism Experience by Popularity chart (above) and table (below) indicate which tourism experiences geolocated by DCBA have the highest percentage of visitors. This data indicates that the St. Peter’s Marina is by far the most popular tourism experience on Cape Breton Island with almost 52% of the sample population visiting this location. The next closest attraction was Marine Atlantic at 6.4% of the visiting population followed by the Lakes at Ben Eoin at 5.7%. This was pointed out to the Rove representative as a concerning outlier in the data. Jennifer Griswold responded, *“I think that maybe we might want to consider adjusting the duration of visit if you think that Port of Sydney should have higher device numbers than St. Peter’s Marina. We currently have that to be considered a tourist you must spend more than 20 minutes at the polygon. How long would the average tourist spend at Port of Sydney or some of these other locations? Clients have a lot of success at 15 minutes to weed out pass-thru traffic and have meaningful visitor devices. That’s an easy change to make in the platform if you’d like to try it and move the duration around a bit.”* This response does not seem to acknowledge the magnitude of the difference between the St. Peter’s Marina data and all other data collected.

Destination	Percent of Sample	Device Numbers
St. Peter's Marina	51.9%	9,845
Marine Atlantic	6.4%	1,214
The Lakes at Ben Eoin	5.7%	1,083
Port of Sydney	3.6%	674
Centre 200	3.4%	649

Destination	Percent of Sample	Device Numbers
Cabot Cape Breton	3.3%	627
Port Hawkesbury Civic Centre	3.0%	570
J.A. Douglas McCurdy Sydney Airport	2.3%	440
Cape Breton Highlands Links	2.3%	429
Le Portage Golf Club	1.9%	366
Destination Cape Smokey	1.8%	336
Keltic Lodge at the Highlands	1.7%	314
Savoy Theatre	1.4%	267
Membertou Trade and Convention Centre	1.3%	245
Eskasoni Cultural Journeys	1.0%	181
Cape Breton Miners Museum	0.9%	165
Two Rivers Wildlife Park	0.9%	164
The Dancing Goat	0.7%	139
Fortress of Louisbourg National Historic Site	0.7%	129
Bell Bay Golf Club	0.5%	101
Dundee Resort	0.5%	97
Alexander Graham Bell National Historic Site	0.4%	85
Cheticamp Visitor Centre	0.4%	77
Les Trois Pignons	0.4%	71
Baddeck Wharf	0.4%	69
Meat Cove Campground	0.3%	56

Destination	Percent of Sample	Device Numbers
Breton Brewing Co.	0.3%	53
Route 19 Brewing	0.3%	51
Glenora Distillery	0.3%	50
The Farmer's Daughter Country Market	0.3%	50
Cape Breton Centre for Craft and Design	0.2%	45
Highland Village Museum	0.2%	44
North Highlands Nordic	0.2%	32
Big Spruce Brewing	0.1%	28
Wagmatcook Culture & Heritage Centre	0.1%	28
Customs House Artisan Incubator	0.1%	28
Island Folk Cider House	0.1%	25
Port Hood Beach	0.1%	24
Gaelic College	0.1%	23

Case Studies

The case study project is progressing. Dana McCormack has completed one interview with Sara Bryden and Martin Kejval at Cape Smokey and has formatted the transcript to be ready to be used for producing the first case study. The transcript has been sent to the CBITTN Research lead who will produce a draft case study by the end of this week or early next week. Dana has scheduled an interview with Sarah Ash at the Port of Sydney for this week. Two other initial interviews (Six Little Farmers and Northeast Cove Geodomes) have been postponed as a result of operator requests. Dana will attempt to reschedule these interviews. Dana is also working on writing up a case study for Celtic Colours to be used by Tracey for use in a microcredential course.