

Unama'ki – Cape Breton Island Tourism Report 2024

CHALLENGES, OPPORTUNITIES, AND STRATEGIC DIRECTIONS

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Executive Summary

The **2024 Cape Breton Island Visitor Experience Survey** offers a comprehensive analysis of the behaviors, preferences, and perceptions of visitors to Unama'ki - Cape Breton Island during the summer of 2024. Conducted by the Cape Breton Island Tourism Training Network, this research gathered data from 1,802 participants at key tourism locations across the island. Its purpose is to provide actionable insights for stakeholders to strengthen the island's tourism industry and enhance visitor experiences.

Key Findings

- **Visitor Demographics and Behavior:** Approximately 70% of visitors were first-time travelers to the island, with most traveling as couples or families. Visitors primarily relied on online resources and maps for trip planning, but 28% still used paper maps, reflecting a blend of traditional and digital navigation preferences.
- **Spending Patterns:** The average daily spend per visitor was \$197CAD, with higher spending observed at specific locations such as Ski Cape Smokey.
- **Attractors:** Iconic sites like the Cabot Trail and the Fortress of Louisbourg National Historic Site remain pivotal in drawing visitors. Indigenous cultural experiences, though currently niche, present opportunities for growth, particularly for visitors staying four days or longer.
- **Challenges:** Visitors identified issues such as limited cell reception, long distances between attractions, and road conditions. Approximately 30% encountered businesses or restaurants that were closed during their stay.
- **Winter Tourism:** While 63% of summer visitors indicated they were unlikely to visit in the winter, 37% expressed openness, particularly for activities such as downhill skiing and winter spas. Regional markets, such as Atlantic Canada, showed greater interest in winter tourism.

Strategic Recommendations

This report outlines tailored strategies to address identified challenges and capitalize on opportunities for growth. Recommendations include infrastructure improvements, expanded winter tourism offerings, enhanced marketing campaigns, and increased collaboration among stakeholders. Specific actions are proposed for Destination Cape Breton, local governments, tourism operators, and other key stakeholders to strengthen the island's tourism industry.

Conclusion

Unama'ki - Cape Breton Island continues to captivate visitors with its natural beauty, cultural heritage, and unique attractions. However, addressing challenges such as accessibility, infrastructure, and seasonal tourism gaps will be essential for sustaining growth and enhancing the visitor experience. By implementing the strategies outlined in this report, stakeholders can position Unama'ki - Cape Breton Island as a world-class, year-round destination that benefits both visitors and local communities.

Introduction

The 2024 Unama'ki - Cape Breton Island Visitor Experience survey is the second island-wide summer visitor survey conducted by the Cape Breton Island Tourism Training Network (CBITTN). The CBITTN is a three-year post-pandemic recovery project is funded in part by the Government of Canada's Sectoral Initiatives Program and overseen by Cape Breton University's World Tourism Institute with official project partners: Destination Cape Breton and the Cape Breton Partnership. The purpose of the CBITTN is to provide tourism operators on Unama'ki - Cape Breton Island with training and research to assist with the recovery and improvement of the island's tourism sector.

The CBITTN conducted the 2024 Summer Visitor Experience Survey between June 17th and September 30th, 2024. CBITTN employed four graduate students from the CBU MBA-CED program as research assistants to gather data from visitors to Unama'ki - Cape Breton Island at pre-determined sites. Research assistants approached visitors at popular tourism locations and conducted the surveys orally. The general survey collected data from total of 1,802 individuals at popular tourism destinations across Unama'ki - Cape Breton Island. Of those surveyed, 1,704 were visitors originating from outside of the island.

2024 General Survey Overview

Methodology

The 2024 Cape Breton Island Visitor Experience Survey employed branching survey logic to collect comprehensive and tailored data from participants. This method dynamically adjusted survey paths based on respondents' answers, allowing questions to focus on relevant topics while bypassing irrelevant ones.

Three distinct categories of questions were utilized:

1. **General Questions:** These were posed to all 1,802 participants and included demographic inquiries, daily spending habits, duration of stay, postal/zip codes, travel group composition, and trip planning methods.
2. **Cape Breton Island Visitor Experience:** This subset delved deeper into visitor impressions and experiences specific to Unama'ki - Cape Breton Island. These questions were administered to 856 participants across various locations on the island.
3. **Location-Specific Questions:** These were developed in collaboration with tourism operators at participating sites, including the Baddeck Area Business and Tourism Association (BABTA), Ski Cape Smokey, Baile nan Gàidheal | Highland Village, Cape Breton Miners Museum, and Membertou Heritage Park. These questions captured unique insights relevant to each location. At these sites, research assistants alternated between administering the general survey and the appropriate location-specific survey. The findings from these specialized surveys were shared directly with the respective operators.

[Researcher] Which survey do you want to give?

Answered: 1,802 Skipped: 5

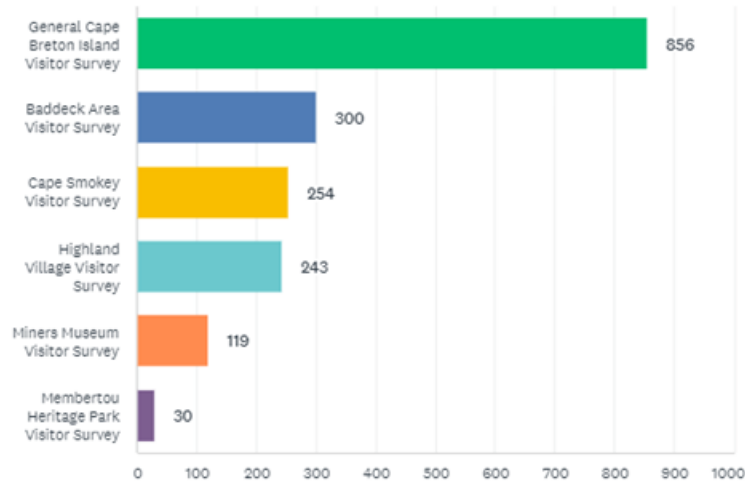


Figure 1- Available Surveys

Data collection was conducted by trained research assistants from the CBU MBA-CED program. From June 17 to September 30, 2024, they engaged visitors at pre-determined high-traffic tourism locations across Unama’ki - Cape Breton Island. Oral surveys were conducted, ensuring inclusivity and immediate response capture. The overall sample included 1,704 visitors from outside the island.

In addition to partner sites, visitor experience data was also gathered at popular locations such as the St. Peter’s Visitor Information Centre, Downtown Sydney, the Skyline Trail, and the Fortress of Louisbourg National Historic Site. These locations were selected to represent diverse visitor experiences and capture a wide spectrum of insights.

Survey Results

The 2024 Unama’ki – Cape Breton Island Visitor Experience Survey provides valuable insights into the behaviors, preferences, and perceptions of visitors to the island. Through a combination of general and location-specific questions, the survey captured detailed data on key aspects of the visitor experience, including first impressions, spending habits, activity preferences, and challenges encountered. The results offer a comprehensive snapshot of visitor dynamics, highlighting trends, opportunities, and areas for improvement that can inform strategies to enhance the island’s tourism sector.

Demographics

The 2024 Cape Breton Island Visitor Experience Survey gathered some demographic data to better understand the characteristics of visitors to Unama’ki - Cape Breton Island. This information provides critical context for interpreting visitor behaviors, preferences, and challenges. Furthermore, this demographic data was used to identify trends and patterns among visitors.

The majority (62%) of surveyed visitors were domestic travelers from across Canada, with strong representation from Nova Scotia, Ontario, Quebec, and Alberta. These regions accounted for a significant portion of Cape Breton Island’s tourism market. Almost half of all surveyed visitors were from Central or Western Canada (49%), while only 13% of surveyed visitors were from Atlantic Canada (including Nova Scotia). Visitors from the United States formed a smaller but noteworthy segment (22%), with travelers arriving from states such as New York, Massachusetts, Florida, and California. The survey also captured responses from international travelers, reflecting Cape Breton Island’s growing appeal on a global scale. The relatively low proportion of Atlantic Canadian visitors may be a result of the locations that survey data was collected. Survey data was collected at popular attractions across the island. Repeat visitors are likely to have visited these locations on an initial visit and prefer less well-known locations for subsequent visits.

Where are you from?

Answered: 1,769 Skipped: 38

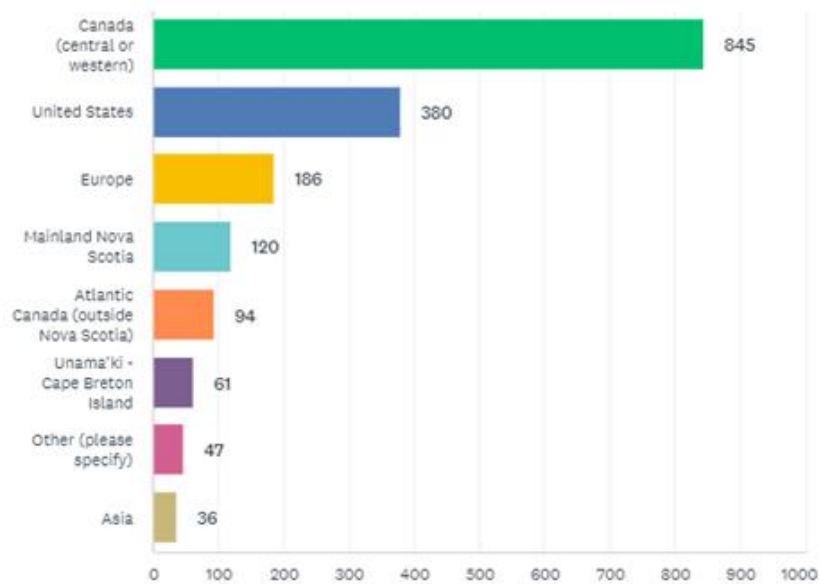


Figure 2 - Visitor Origin

Visitor frequency varied significantly based on geographic origin, revealing insights into the patterns of repeat visitation. Among all returning visitors, 28% were from Atlantic Canada, reflecting the strong regional ties and accessibility of Unama’ki - Cape Breton Island to nearby provinces. Atlantic Canadians also exhibited the highest rate of repeat visitation, with 67% of visitors from this region identifying as returning travelers. In contrast, only 31% of central and western Canadian visitors reported previous trips to the island, indicating lower repeat visitation rates among these more distant domestic markets. For international visitors, repeat visitation was markedly lower. Only 16% of U.S. travelers had visited Unama’ki - Cape Breton Island before, while visitors from Europe and Asia reported an even lower return rate of 11%. This data highlights the importance of fostering loyalty among regional visitors while identifying opportunities to increase repeat visitation from national and international markets through targeted marketing and tailored experiences.

Is this your first visit to Unama'ki - Cape Breton Island?

Answered: 1,713 Skipped: 94

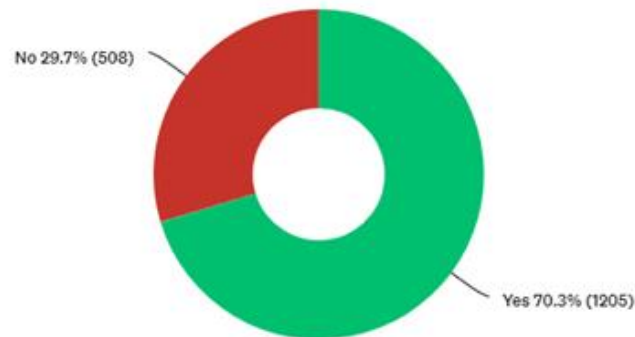


Figure 3 - Returning Visitors

In terms of travel group composition, nearly half of the visitors (48%) traveled as couples, making this the most common travel group. Families with dependent children constituted 18% of respondents, indicating the island's attractiveness as a family-friendly destination. Solo travelers represented 5% of the surveyed population, while other groups, such as friends traveling together, made up the remainder.

Visitor frequency data revealed that 70% of respondents were first-time visitors to Unama'ki - Cape Breton Island. This high proportion highlights significant opportunities for expanding word-of-mouth promotion and encouraging repeat visitation. The remaining 30% of travelers were returning visitors, reflecting a loyal audience that can be further engaged through targeted efforts.

This demographic overview emphasizes the diversity of Unama'ki - Cape Breton Island's visitor base, showcasing opportunities to enhance the experiences of first-time travelers, support the growing family and couple segments, and strengthen engagement with domestic and U.S. markets. Additionally, the presence of international visitors points to the potential for further developing the island's appeal as a global destination.

The Causeway and First Impressions

To better understand visitor entry points, participants were asked about their mode of arrival on the island. The majority (85%) reached Unama'ki - Cape Breton Island by crossing the causeway, either by passenger vehicle (61%) or via air through Halifax Stanfield Airport, followed by a vehicle crossing the causeway (24%). These findings emphasize the importance of the Port Hastings rotary as a critical entry point for the majority of visitors to the island.

How did you travel to Unama'ki - Cape Breton Island?

Answered: 1,711 Skipped: 96

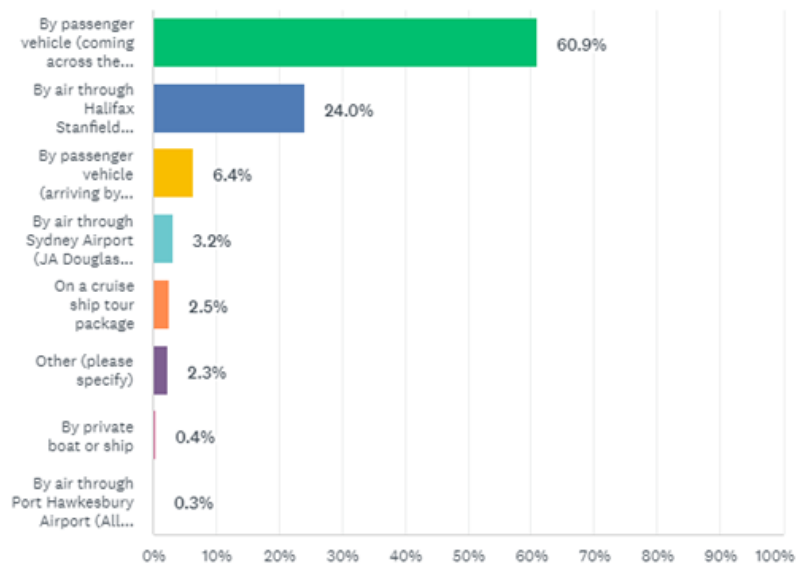


Figure 4 - Method of Arrival

For many visitors to Unama'ki - Cape Breton Island, the journey begins with crossing the causeway, making the Port Hastings rotary a significant entry point and first impression of the island. To evaluate these initial impressions, 1,449 survey participants who arrived via the causeway were asked: "What one or two words reflect your impression directly after crossing the causeway into Unama'ki - Cape Breton Island?"



Figure 5 - First Impressions Word Cloud

A total of 2,703 words were recorded in response to this question, which were classified into positive, neutral, or negative categories.

- Positive Impressions:** The vast majority of responses (79.1%) were positive. The word “Beautiful,” including related terms like “Beauty,” appeared in 37% (536) of all responses, underscoring the island’s natural appeal. Other commonly mentioned positive terms included “Nice” (77 mentions), “Amazing” (67 mentions), “Scenic” (62 mentions), and “Excited” (38 mentions).
- Neutral Impressions:** Approximately 18.1% of responses were categorized as neutral. The most frequent neutral word was “Home” (40 mentions), which could reflect a range of interpretations, from a sense of comfort to the visitor’s place of origin. Other neutral terms included “Natural” and “Nature” (20 mentions), “Interesting” (17 mentions), “Historical” and “History” (13 mentions), and “Green” (10 mentions).
- Negative Impressions:** Only 2.6% of responses were classified as negative. Among these, the term “Road” appeared most frequently (17 mentions), often associated with complaints about potholes or insufficient signage. Additional negative terms included “Confusing” (4 mentions, referring to the rotary), as well as “Rundown,” “Scary,” and “Messy.”

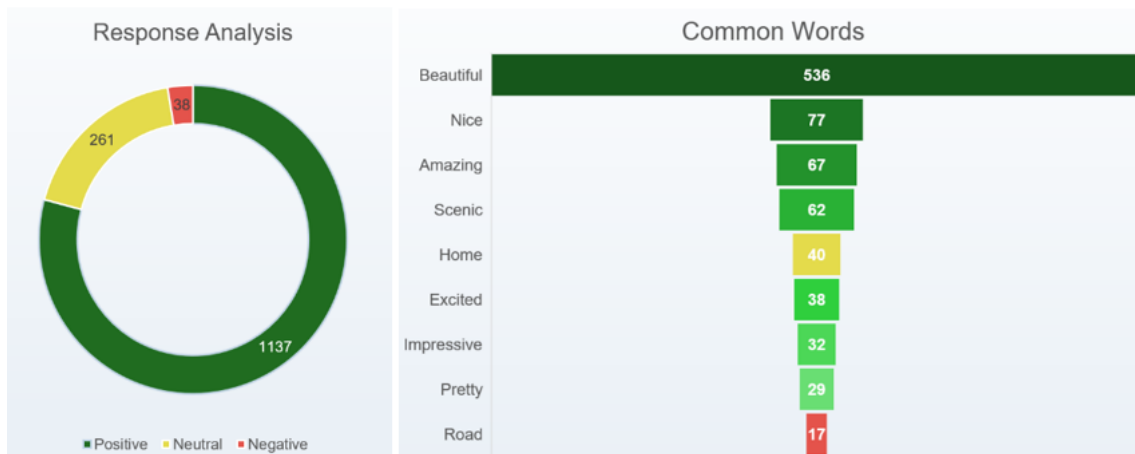


Figure 6 - First Impressions Word Frequency

The data underscores a strong positive initial impression among visitors to Unama’ki - Cape Breton Island, with nearly four out of five responses reflecting enthusiasm for the island’s natural beauty and charm. However, the small percentage of negative feedback, primarily focused on road conditions and the appearance of the Port Hastings rotary, highlights opportunities for improvement. Enhancing the visual appeal and functionality of this critical entry point could amplify the positive first impressions already experienced by the majority of visitors. Importantly, the disparity between visitor perceptions and local concerns suggests that locals may be more attuned to these issues due to regular exposure. Addressing these aesthetic and infrastructural challenges could not only improve visitor experiences but also bolster community pride in this gateway to the island.

Visitor Behavior & Choices

The 2024 Cape Breton Island Visitor Experience Survey explored visitor plans, decision-making processes, and activities undertaken during their time on Unama'ki - Cape Breton Island. The survey report also includes comparisons with results from the 2023 surveys, providing insights into potential trends.

Trip Planning Tools

Survey participants were asked about the tools they used to plan their trips. The most frequently utilized resource was **internet research**, with 77% of respondents indicating that they relied on online platforms. Just over half of participants (52%) reported using online maps, such as Google Maps or Apple Maps, as part of their planning process. However, limited cellular coverage on the island presents challenges to using such tools, a concern also highlighted in the **Challenges** section of this report.

What tools did you use to plan your trip to Cape Breton? (Select all that apply.)

Answered: 1,623 Skipped: 184

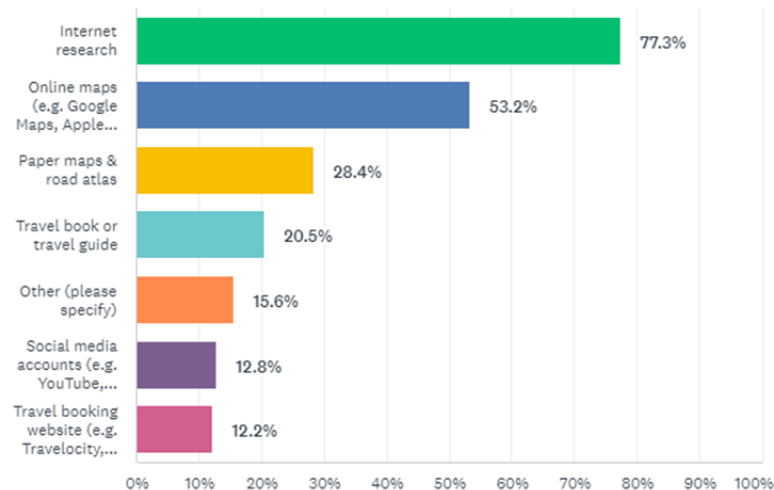


Figure 7 - Planning Tools

Paper maps and road atlases were used by 28% of respondents, reflecting a blend of practical needs (given limited cellular coverage) and a possible resurgence in the popularity of traditional navigation tools among certain demographics ([The Wall Street Journal](#)). Social media played a smaller but notable role, with 12.8% of visitors consulting platforms like Instagram or YouTube for trip planning inspiration. This suggests an emerging influence of digital travel influencers and content creators in shaping visitor decisions.

Length of Stay

When asked about the duration of their visit, the majority (73%) of participants in the 2024 survey planned to stay on the island for two to seven days, compared to 81% in the 2023 survey. This represents a slight shift toward either shorter or longer stays. Notably, 22.8% of respondents in

2024 planned to stay for a week or more, up from 19% in 2023. Conversely, medium-length stays (four days to two weeks) showed a slight decline between the two years.

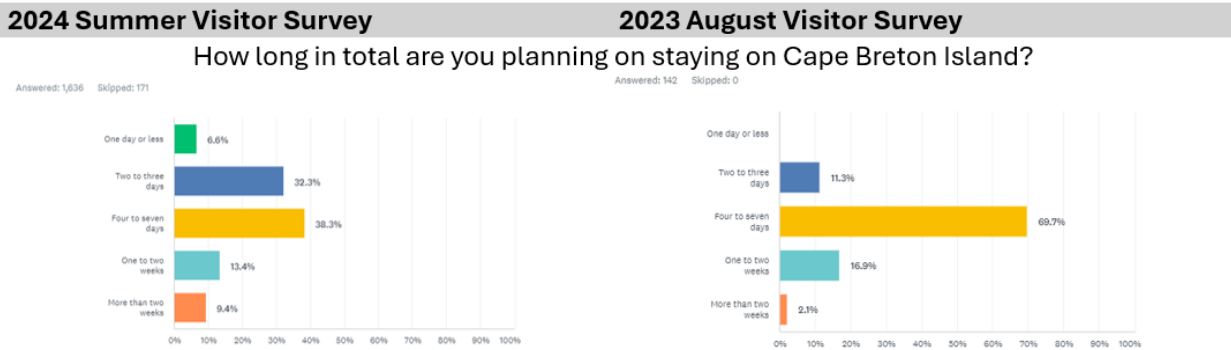


Figure 8 - Intended Lengths of Stay, 2024 & 2023

Accommodation Preferences

Participants identified the types of accommodations they used during their stay. Hotels and motels remained the most common choice in both 2023 and 2024. However, their popularity declined sharply, with 43.8% of visitors in 2024 reporting stays in these accommodations compared to 70.7% in 2023. Conversely, the popularity of inns and bed-and-breakfasts almost doubled, rising from 6.4% in 2023 to 13.1% in 2024. Campgrounds, including national and private options, also saw a notable increase, with 27.2% of visitors choosing this accommodation type in 2024, up from 22.9% in 2023.

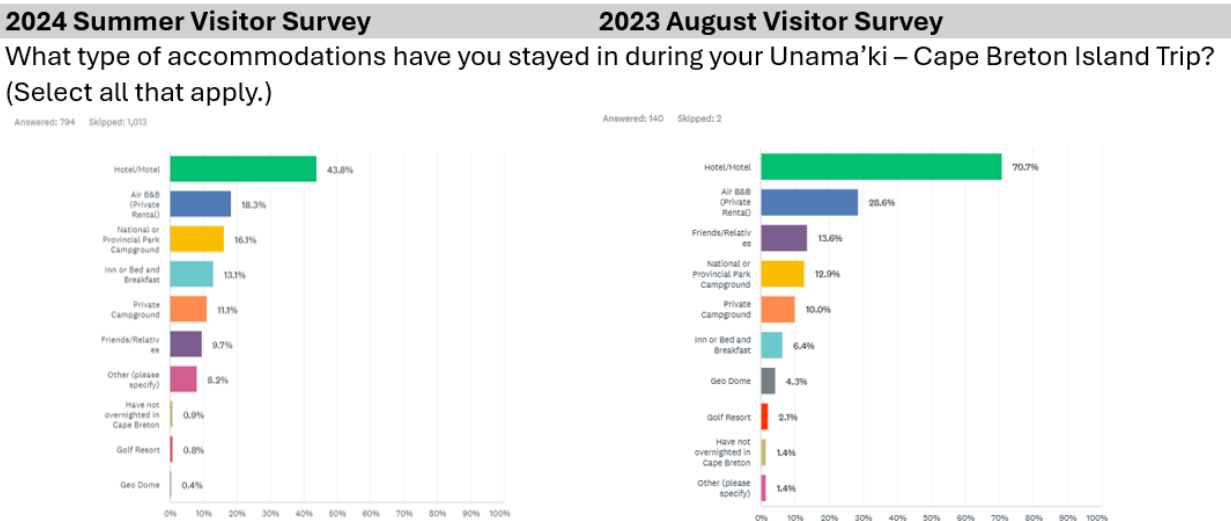


Figure 9 - Accommodation Types, 2024 & 2023

Factors Influencing Accommodation Shifts

The observed shift in accommodation preferences may be attributed to climate and local weather conditions. The summer of 2024 was characterized by more favorable weather, following a wetter winter and spring with significant snowfall. In contrast, the summer of 2023 experienced poorer weather, including extended periods of rain and fog ([Weather Spark](#)). These conditions may have

discouraged camping in 2023, leading visitors to opt for hotels or motels. Additionally, the 2023 wildfire season, exacerbated by dry conditions in the preceding months, led to severe burn restrictions forbidding campfires. This likely impacted the desirability of camping and visitor behavior. By comparison, 2024 experienced one of Nova Scotia's least active wildfire seasons ([Acadia Broadcasting](#)), making camping a more attractive option.

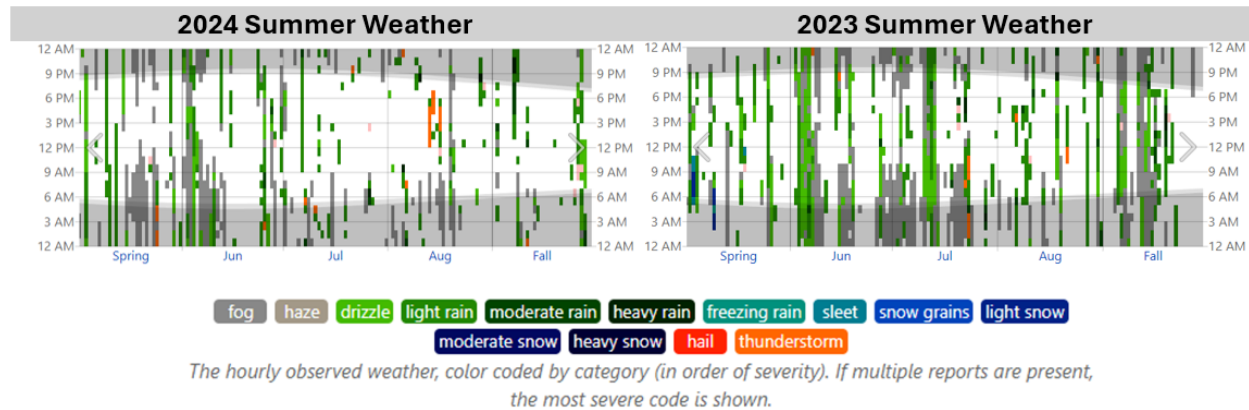


Figure 10 - Significant Summer Weather Events, 2024 & 2023

Daily Spend

The 2024 Visitor Experience Survey asked all respondents to estimate their daily spending, excluding lodging costs. Among the 1,572 participants who provided answers, the average reported daily spend was **\$197CAD per person**. Reported average daily spend varied slightly based on visitor origin. Surprisingly, visitors from Atlantic Canada had a higher reported daily spend than visitors from other locations. Unfortunately, the survey question did not specify the currency for the estimate; therefore, it is possible that some visitors from the United States may have been estimating in American dollars.

- **Visitors from the United States:** \$194.6
- **Visitors from Europe and Asia:** \$200.3
- **Visitors from Central or Western Canada:** \$195.5
- **Visitors from Atlantic Canada:** \$208.8

Although the 2024 survey data cannot be directly compared to the findings from a 2023 economic impact study by KPMG, which estimated an average daily spend of \$145CAD per visitor, the difference in methodologies are likely due to variations in visitor profiles and reporting methods. The KPMG study, commissioned by the Cape Breton Partnership, utilized data from Tourism Nova Scotia and Cruise Lines International Association to allocate spending proportions based on visitor demographics. In contrast, this research directly surveyed visitors at popular tourism sites and utilized self-reported data. These methodological differences make it inappropriate to infer trends solely from the two datasets.

In addition to general visitor data, the survey also highlighted notable variations in spending patterns at specific attractions. In general, visitors at specific attractions reported an average daily spend of approximately \$180CAD, with one exception. Visitors to Ski Cape Smokey reported significantly higher daily spend estimates.

- **Cape Breton Miners Museum:** Average daily spend of \$180
- **Baile nan Gàidheal | Highland Village:** Average daily spend of \$180
- **Baddeck Area:** Average daily spend of \$182
- **Ski Cape Smokey:** Average daily spend of \$286

Visitors to Ski Cape Smokey reported a daily spend that was 59% greater than the daily spend reported by visitors at other destinations. These figures indicate that certain attractions and areas, such as Ski Cape Smokey, attract visitors with higher spending capacity, which could inform targeted marketing and investment strategies.

The insights into daily visitor spending provide a nuanced understanding of the economic contributions of tourism to Unama'ki - Cape Breton Island. While direct comparisons to historical data are limited due to differences in methodologies, the average daily spend of \$197CAD (excluding lodging) reflects the significant economic impact of tourism on the region. The variation in spending across specific attractions, particularly the elevated spending at Ski Cape Smokey, suggests that certain sites attract visitors with higher expenditure patterns. These findings highlight opportunities to tailor marketing and investment strategies to capitalize on high-spending visitor segments and enhance the overall economic impact of tourism. Additionally, understanding spending patterns can guide tourism operators and stakeholders in developing products and experiences that align with visitor preferences, potentially increasing both revenue and satisfaction. By leveraging this data, the tourism industry can strengthen its economic contributions while fostering a more robust and resilient destination.

Attractors

Visitor attractors are the experiences, landmarks, and activities that motivate travelers to visit a destination. Understanding these attractors provides critical insights for marketing strategies and investment decisions. The 2024 Visitor Experience Survey explored the factors that influenced travelers' decisions to visit Unama'ki - Cape Breton Island, building on similar data collected in 2023.

What attractions, if any, helped motivate your decision to travel to Unama'ki - Cape Breton Island? (Select all that apply.)

Answered: 802 Skipped: 1,005

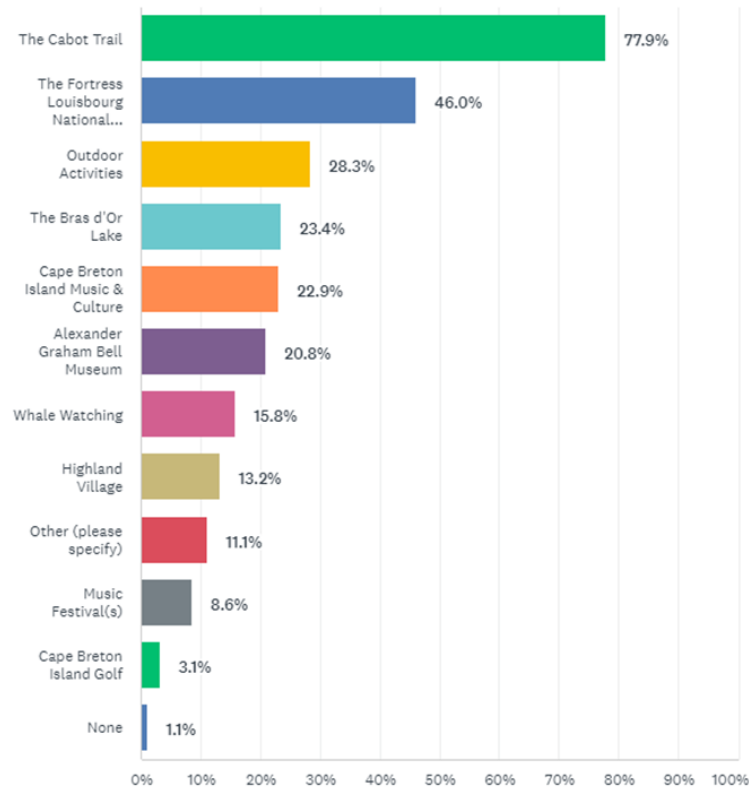


Figure 11- Motivating Attractors

Key Findings on Attractors

Both the 2023 and 2024 surveys identified the Cabot Trail and the Fortress of Louisbourg National Historic Site as the top two attractors. However, the reported influence of these attractors showed notable differences between the two years. In 2023, 97.2% of respondents identified the Cabot Trail as a motivating factor, while in 2024, 77.8% of respondents selected it. This variation may be attributed to changes in the survey format, particularly the placement of the Cabot Trail option on the attractors list, which was moved from the first choice in 2023 to a lower position in 2024. Such changes underscore the importance that survey design has on results and analysis.

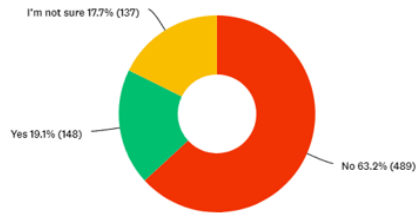
Indigenous Cultural Experiences

When asked about participation in Indigenous cultural experiences, 20% of respondents in both 2023 and 2024 indicated they had participated or were planning to participate. The phrasing of the question in 2024 allowed for a broader interpretation by including both past participation and future intentions, potentially accounting for the consistency in responses. Notably, when analyzing responses from visitors who had been on the island for four or more days, participation in Indigenous experiences rose to 32% in 2023. This suggests that extended stays may increase engagement with Indigenous cultural offerings, a key opportunity for development.

2024 Survey

Have you participated in, or are you planning on participating in, an Indigenous cultural experience on Unama'ki - Cape Breton Island?

Answered: 774 Skipped: 1,033



2023 Survey (all respondents)

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

Answered: 142 Skipped: 0

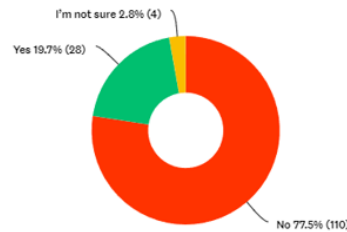


Figure 12 - Indigenous Experience Participation, 2024 & 2023

Implications and Opportunities

The data indicates that traditional attractors such as the Cabot Trail and the Fortress of Louisbourg National Historic Site remain pivotal in drawing visitors to Unama'ki - Cape Breton Island. However, emerging interests, such as Indigenous cultural experiences, highlight the potential to diversify the island's appeal. Strategic marketing and investment in lesser-known or niche attractors could help capture new visitor segments while enriching the overall visitor experience. Furthermore, ensuring consistency in survey methodologies will be essential for accurately tracking and responding to shifts in visitor preferences over time.

Winter Visitation

Expanding tourism in Unama'ki - Cape Breton Island to include an active winter season presents an opportunity to enhance the island's tourism economy. A robust winter tourism offering could generate additional revenue and provide businesses with the ability to employ year-round staff, reducing reliance on seasonal workers. To explore this potential, the 2023 and 2024 Visitor Experience Surveys included questions aimed at understanding visitors' attitudes toward winter travel and identifying potential winter attractors.

General Attitudes Toward Winter Travel

In the July 2023 Visitor Experience Survey, respondents were asked about their interest in visiting Unama'ki - Cape Breton Island during the winter. While 25% stated they would not consider visiting in the winter, only 12% expressed definite interest. The majority (64%) were undecided, indicating a significant opportunity to influence potential visitors through targeted marketing and product development.

Potential Winter Attractors

To further explore this interest, the August 2023 visitor survey asked participants to identify winter activities that might motivate them to visit the island. **Skiing** emerged as the most popular choice, selected by 65% of respondents, followed by **snowshoeing** (27%). These findings informed the 2024 survey, which refined the question by separating skiing into **downhill skiing** and **cross-country skiing** and adding the option "nothing would bring me to Cape Breton in the winter."

In the 2024 Visitor Experience Survey, 63% of respondents indicated that no activities would draw them to Unama’ki - Cape Breton in the winter, suggesting that the majority of summer visitors may not be the ideal target audience for winter travel. However, 37% expressed openness to winter visitation, with the top attractors including **downhill skiing, winter tour packages, and winter/Nordic spas**. However, survey participants did not identify an obvious top winter attraction. The popularity of specific activities had a limited range between 9.7% and 6.2% of respondents. This suggests that visitors are not looking for a key winter activity but may be more interested in a variety of options.

When the data was filtered to focus on respondents from Atlantic Canada, interest in winter travel to Unama’ki – Cape Breton Island increased significantly. Fewer than half (45%) of Atlantic Canadian respondents indicated that no activities would draw them to the island during the winter, compared to 63% of the general survey population. Additionally, “Other” was a commonly selected response among Atlantic Canadians, allowing participants to specify attractors not listed in the survey. Many respondents in this category highlighted visiting friends and family as a key motivator for winter travel. This finding suggests that Atlantic Canadians represent a promising market for winter tourism, particularly through campaigns that emphasize reconnecting with loved ones during the winter season.

2024 Visitor Experience Survey (all visitors) 2024 Visitor Experience Survey (Atlantic Canada including NS)

What would bring you to visit Unama’ki – Cape Breton Island during the winter? (Select all that apply.)

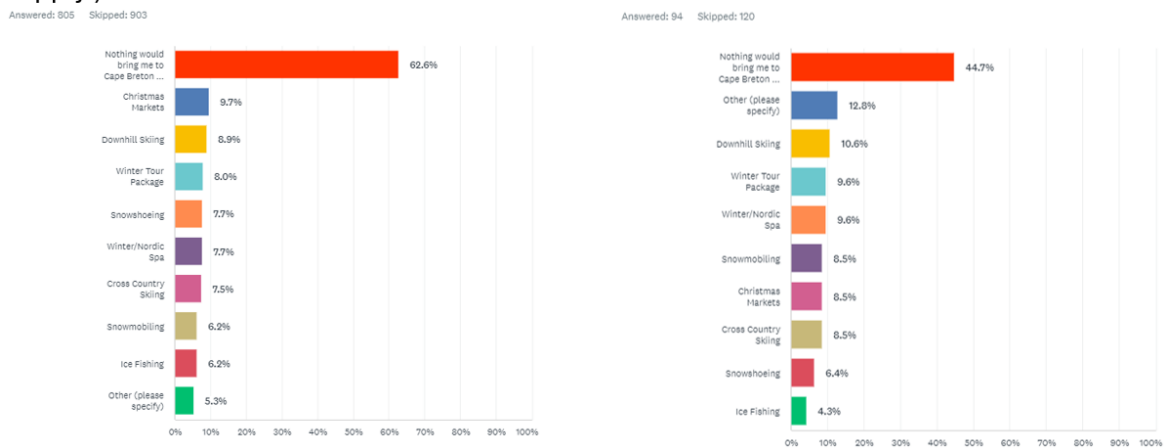


Figure 13 - Winter Visitation Attractors, All Visitors & Atlantic Canadian Visitors

Opportunities for Growth

The data highlights significant opportunities to develop winter tourism on Unama’ki – Cape Breton Island. While the majority of summer visitors may not easily transition to winter travelers, a notable minority expressed interest in visiting during the colder months. Activities such as downhill skiing, winter spas, and winter tour packages were identified as potential motivators, but the survey also indicates that no single activity dominates as a clear attractor. This suggests that offering a diverse range of winter experiences—such as snowshoeing, ice skating, and cultural events—would create a more appealing and comprehensive winter tourism environment. By emphasizing variety, the

island can cater to different interests and encourage visitation from both new and returning audiences.

Regional markets, particularly Atlantic Canada, emerge as the most promising focus for winter tourism development. Residents of this region demonstrated higher interest in winter travel, with less than half indicating that no activities would draw them to the island. Additionally, the importance of visiting friends and family during the winter season among Atlantic Canadians provides a unique angle for targeted marketing campaigns. Promotional efforts that highlight reconnecting with loved ones, coupled with showcasing accessible and diverse winter activities, could effectively boost visitation during the off-season. Leveraging these insights allows Unama'ki – Cape Breton Island to expand its tourism offerings, strengthen its appeal to regional travelers, and take a significant step toward establishing itself as a four-season destination.

Challenges for Visitors

Visitors to Unama'ki – Cape Breton Island were asked to identify challenges they encountered during their trip. While 42% of respondents reported no major issues, 58% highlighted areas that require attention. These insights are essential for improving the visitor experience and strengthening the island's tourism infrastructure.

Key Challenges Identified

The most frequently reported challenge was the **distance between key destinations**, cited by 19% of respondents. This reflects the geographic spread of attractions across the island and underscores the need for better communication about travel logistics or improved connectivity between sites.

Limited cellular reception was also highlighted by 17% of visitors. Poor reception impacts the use of essential travel tools such as online maps and guides, particularly in remote areas, and can lead to frustration for travelers relying on digital navigation.

Another 17% of respondents noted **road conditions and infrastructure** as a challenge. Complaints ranged from poor road maintenance, including potholes, to ongoing construction projects, which not only affect the ease of travel but also shape visitors' overall impressions of the destination.

What has been the most challenging parts of your Unama'ki - Cape Breton Island trip? (Select all that apply.)

Answered: 761 Skipped: 1,046

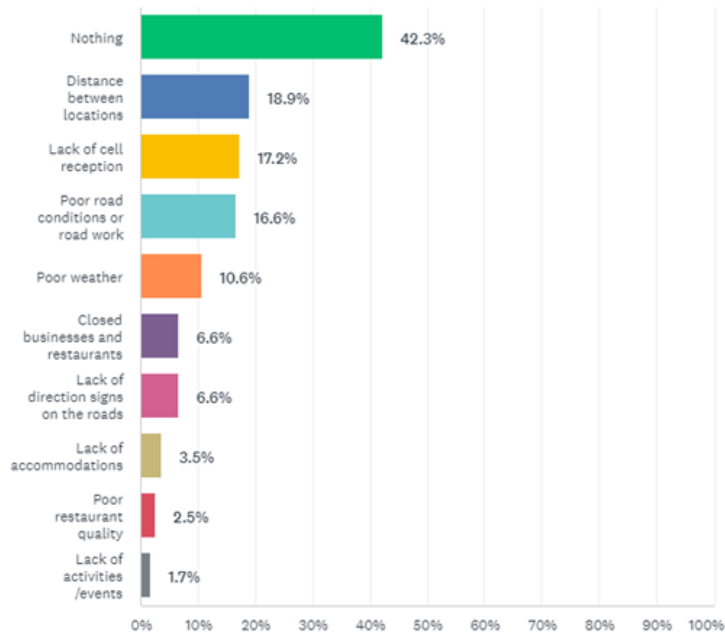


Figure 14 - Challenges for Visitors

Business accessibility emerged as another significant issue, with 30% of respondents encountering businesses that were closed during their visit. This figure rose to 43% among visitors staying for a week or longer, indicating that staffing shortages and limited operating hours may be hindering the visitor experience.

Specific Impacts of Challenges

Challenges such as **cellular reception** and **business closures** were more pronounced among visitors with longer stays. For instance, 62% of visitors who stayed on the island for a week or longer reported cellular reception as at least a minor problem, nearly double the percentage among the general visitor population. Similarly, difficulties finding open businesses were significantly more common among long-term visitors, suggesting that these challenges may disproportionately affect those spending more time on the island.

All Respondents

One Week or More on Island

While on Unama’ki – Cape Breton Island, have you encountered businesses that you would have visited but were closed?

Answered: 810 Skipped: 997

Answered: 112 Skipped: 81



Figure 15 - Visitors Encountering Closed Businesses

Dining challenges, highlighted in a CBC News story (CBC News), were another notable issue. According to the survey, 23% of visitors reported at least occasional difficulty finding places to eat. While still a minority, this figure is significant given its potential impact on visitor satisfaction and future behavior.

While on Unama'ki - Cape Breton Island, have you found it difficult to find open restaurants or other places to eat?

Answered: 94 Skipped: 120

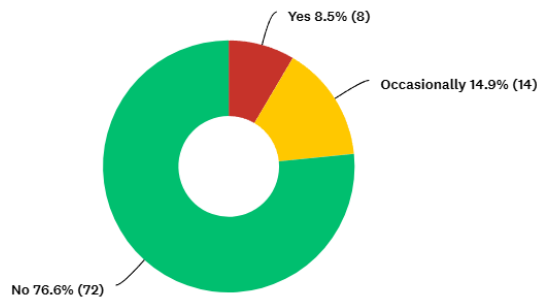


Figure 16 - Difficulty Finding Open Places to Eat

Dining is a critical aspect of the travel experience, and challenges in accessing dining options—whether due to closures, inconsistent hours, or limited availability—can negatively influence perceptions of the destination and reduce the likelihood of repeat visits or recommendations.

Addressing this challenge through clearer communication about dining options, promoting consistent operating hours, and encouraging restaurants to remain open during peak periods could significantly enhance visitor experiences and strengthen the island’s reputation as a welcoming and organized destination.

Addressing the Challenges

While many visitors reported no significant issues, the challenges identified in this survey highlight critical areas for improvement that could enhance the overall visitor experience. Addressing key concerns such as limited cell phone coverage and road conditions could significantly reduce frustrations and improve accessibility, particularly in remote areas. Expanding cellular coverage

would enable visitors to navigate more effectively and access essential travel resources, while investments in road maintenance and clearer signage would ensure safer and smoother travel across the island.

Enhancing business accessibility is another vital step. The reported difficulty in finding open businesses, including restaurants, indicates a need for more consistent operating hours and improved communication about available options. Efforts to collaborate with local businesses to extend hours, especially during peak travel seasons, combined with providing visitors with up-to-date information on dining and retail options, could alleviate much of this frustration. Dining challenges, in particular, require focused attention, as they directly impact visitor satisfaction and the likelihood of repeat visits or positive recommendations.

To address the geographic spread of attractions and long travel distances, providing tools such as curated itineraries, detailed maps, or shuttle services could help visitors plan their trips more effectively. By implementing these targeted improvements, Unama'ki – Cape Breton Island can position itself as a destination that balances its natural beauty with modern conveniences, creating a seamless and enjoyable experience for travelers from all backgrounds.

Net Promoter Score

Each participant in our recent survey was asked a Net Promoter Score (NPS) question, tailored either to general Unama'ki - Cape Breton or a specific location, to measure visitor sentiment. The NPS is a widely used metric in tourism for gauging visitor attitudes toward destinations. By comparing NPS scores over time, tourism organizations can identify shifts in visitor satisfaction and brand loyalty. In line with this, Destination Canada has made NPS a core indicator in its 2021-2025 Corporate Plan.

To determine a destination's NPS, visitors rate on a scale of 1-10 how likely they are to recommend the location to others. Scores of 9-10 indicate "promoters," 7-8 indicate "passives," and 0-6 indicate "detractors." The NPS is calculated by subtracting the percentage of detractors from promoters.

In 2024, 791 visitors to Unama'ki – Cape Breton Island responded to the general Unama'ki - Cape Breton Island NPS question: 597 were promoters, 182 passives, and 11 detractors, resulting in a high NPS of 74. This is notable, especially in the context of industry standards, where an NPS of 70 and above is considered excellent. For comparison, 2023's Cape Breton Summer Visitor NPS was 69.8, well above the average NPS for general visitors to Canada (47) and aligning with British Columbia's visitor NPS of 66.

To provide further context, here are other relevant NPS scores:

- 2023 Cape Breton Visitors - 70
- Overall Visitors to Canada - 47
- 2021 Visitors to Saskatchewan - 59
- Ontario Visitors to British Columbia - 63
- 2021 Visitors to British Columbia - 66
- 2021 Visitors to Yukon - 81

As Unama’ki – Cape Breton Island continues to evolve and move toward a four-season tourism model, this NPS can serve as a valuable benchmark for tracking changes in visitor satisfaction and loyalty, assessing the impact of tourism strategies, and comparing visitor experiences across seasons, age groups, and demographics. Monitoring these scores will offer insights into shifts in visitor expectations and values, supporting ongoing efforts to adapt Unama’ki - Cape Breton’s tourism offerings to a diverse and evolving audience.

Strategic Recommendations

Based on the findings and insights from the 2024 Cape Breton Island Visitor Experience Survey, the following recommendations aim to strengthen the island’s tourism industry. These actionable strategies are categorized by the primary stakeholders responsible for their implementation.

Destination Marketing Organization

1. Develop Targeted Marketing Campaigns

- Focus on regional markets, particularly Atlantic Canada, for winter tourism, highlighting the opportunity to reconnect with family and friends on Unama’ki – Cape Breton Island.
- Highlight the variety of winter experiences, such as downhill skiing, winter tour packages, and spa retreats, to appeal to diverse interests and enhance the visitor experience.
- Highlight lesser-known cultural and natural assets to diversify visitor interest and reduce over-reliance on iconic attractors like the Cabot Trail.

2. Improve Visitor Information Accessibility

- Enhance pre-trip online resources and ensure real-time updates on events, weather, and road conditions are easily available.
- Expand the use of multilingual and inclusive content to attract international and diverse domestic audiences.

Community Leaders and Local Governments

1. Invest in Infrastructure

- Address road maintenance issues and improve signage to ensure safe and convenient travel across the island.
- Partner with telecommunication providers to expand cellular coverage, especially in remote areas frequented by tourists.

2. Foster Community Engagement

- Encourage local communities to participate in tourism development by promoting local events, arts, and cultural initiatives.

- Facilitate programs that educate residents on the economic benefits of tourism to build community support.

Provincial Administrators and Officials

1. Support Year-Round Tourism

- Develop policies and funding programs to support businesses transitioning to four-season operations, including winter activity infrastructure and staff training initiatives.
- Provide grants or incentives for tourism businesses to expand or modernize facilities, particularly in underserved areas.

2. Enhance Transportation Options

- Invest in public transportation solutions and shuttle services to connect key tourism hubs, reducing the challenge of long travel distances for visitors.
- Improve the entry experience at the Port Hastings causeway with better infrastructure and landscaping.

NGOs and Business Development Organizations

1. Facilitate Collaboration

- Act as intermediaries between businesses, government, and community groups to coordinate tourism-related initiatives.
- Host workshops and conferences to foster innovation and share best practices within the tourism industry.

2. Promote Indigenous Tourism

- Partner with Indigenous communities to develop and market authentic cultural experiences, ensuring sustainable and respectful tourism practices.

Cape Breton University (CBU)

1. Expand Research and Training

- Conduct ongoing visitor experience research to track trends, identify emerging markets, and measure the impact of implemented strategies.
- Develop specialized tourism training programs, including digital marketing, winter tourism management, and sustainable tourism practices.

2. Incubate Tourism Startups

- Collaborate with students, entrepreneurs, and investors to pilot innovative tourism products and experiences that meet changing visitor demands.

Entrepreneurs and Investors

1. Diversify Accommodation Offerings

- Invest in alternative lodging options such as eco-friendly cabins, boutique inns, and experiential accommodations that cater to diverse traveler preferences.

2. Capitalize on Seasonal Opportunities

- Develop products and services tailored to winter tourism, such as guided snowshoe tours, Nordic spas, and festive seasonal events.
- Create new visitor packages combining accommodations, dining, and activities to enhance convenience and value.

Tourism-Related Business Owners and Operators

1. Extend Operating Seasons

- Identify opportunities to expand services beyond the summer months, particularly in winter and shoulder seasons, to support year-round tourism.

2. Enhance Customer Experiences

- Address staffing shortages by improving employee recruitment, training, and retention strategies.
- Upgrade facilities and services to meet visitor expectations, particularly in dining and lodging options.

Additional Stakeholders

1. Environmental Organizations

- Partner with tourism businesses to promote eco-friendly practices, such as reducing waste, conserving water, and promoting sustainable transportation options.

2. Technology Providers

- Collaborate with stakeholders to develop mobile apps and other digital tools to assist visitors with navigation, trip planning, and real-time updates.

Implementing these strategic recommendations has the potential to transform Unama'ki - Cape Breton Island into a more resilient and sustainable tourism destination. By addressing key challenges, such as infrastructure improvements and visitor accessibility, and capitalizing on opportunities like winter tourism and regional marketing, stakeholders can ensure the industry remains competitive and adaptable to evolving visitor expectations. Collaboration among Destination Cape Breton, local governments, businesses, and educational institutions will be critical in realizing these goals. Furthermore, fostering community involvement and leveraging the island's unique cultural and natural assets will enhance the visitor experience while supporting local economic development. Through coordinated efforts and a shared vision, Unama'ki - Cape Breton Island can strengthen its position as a world-class destination for travelers year-round.

Conclusion

The 2024 Cape Breton Island Visitor Experience Survey provides valuable insights into the behaviors, preferences, and challenges of visitors to Unama'ki - Cape Breton Island. The findings underscore the island's enduring appeal, with its breathtaking landscapes, rich cultural heritage, and iconic attractors such as the Cabot Trail and the Fortress of Louisbourg National Historic Site continuing to draw visitors. However, the data also highlights areas for improvement, including infrastructure, accessibility, and diversification of tourism offerings to enhance the overall visitor experience.

Key opportunities lie in addressing challenges such as limited cell reception, road conditions, and the need for more accessible travel options between destinations. Expanding winter tourism, capitalizing on regional markets, and promoting Indigenous cultural experiences represent untapped potential for growth. These opportunities, combined with targeted marketing and strategic investment, could bolster the island's economic resilience and support year-round tourism.

Achieving these goals will require collaboration across stakeholders, including Destination Cape Breton, local governments, business owners, community leaders, and educational institutions. By leveraging the insights from this research and implementing the strategic recommendations outlined in this report, Unama'ki - Cape Breton Island can solidify its position as a world-class destination, offering unparalleled experiences for visitors while fostering sustainable growth for its communities. The path forward is one of innovation, partnership, and shared commitment to realizing the full potential of tourism on Unama'ki - Cape Breton Island.

Appendix

1. [Researcher] Which survey do you want to give?

ANSWER CHOICES	RESPONSES	
General Cape Breton Island Visitor Survey	47.5%	856
Baddeck Area Visitor Survey	16.6%	300
Cape Smokey Visitor Survey	14.1%	254
Highland Village Visitor Survey	13.5%	243
Miners Museum Visitor Survey	6.6%	119
Membertou Heritage Park Visitor Survey	1.7%	30
TOTAL		1,802

2. Where are you from?

ANSWER CHOICES	RESPONSES	
Canada (central or western)	47.8%	845
United States	21.5%	380
Europe	10.5%	186
Mainland Nova Scotia	6.8%	120
Atlantic Canada (outside Nova Scotia)	5.3%	94
Unama'ki - Cape Breton Island	3.4%	61
Other (please specify) Responses	2.7%	47
Asia	2.0%	36
TOTAL		1,769

3. What is your postal or zip code? (If from Canada or the US.)

ANSWER CHOICES	RESPONSES	
Postal Code (Canada) Responses	73.0%	1,023
Zip Code (USA) Responses	27.0%	378

4. Is this your first visit to Unama'ki - Cape Breton Island?

ANSWER CHOICES	RESPONSES	
Yes	70.3%	1,205
No	29.7%	508
TOTAL		1,713

5. How did you travel to Unama'ki - Cape Breton Island?

ANSWER CHOICES	RESPONSES	
By passenger vehicle (coming across the Causeway)	60.9%	1,042
By air through Halifax Stanfield Airport (and vehicle across the Causeway)	24.0%	411
By passenger vehicle (arriving by ferry)	6.4%	109
By air through Sydney Airport (JA Douglas McCurdy)	3.2%	55
On a cruise ship tour package	2.5%	43
Other (please specify)	Responses	40
By private boat or ship	0.4%	6
By air through Port Hawkesbury Airport (Allan J. MacEachen)	0.3%	5
TOTAL		1,711

6. What one or two words reflects your impression directly after crossing the causeway into Unama'ki - Cape Breton Island?

Spreadsheet and word-family analysis data is too large to include in this report. A summary of raw word count data for the 20 most frequently occurring words is below.

beautiful: 503	excited: 38	awesome: 26
and: 169	peaceful: 33	scenery: 25
nice: 75	friendly: 32	good: 25
scenic: 62	impressive: 32	natural: 24
very: 56	pretty: 29	green: 23
amazing: 54	interesting: 27	great: 22
home: 39	nature: 26	

7. What best describes you and/or your travel group?

ANSWER CHOICES	RESPONSES	
Couple	49.9%	851
Family with dependent children	18.2%	311
Family including grown children	7.6%	130
Group of friends	6.5%	111
Two or more families	5.2%	88
Single	5.0%	86
Part of an organized group/tour	3.0%	52
Other (please specify)	Responses	41
Two or more couples	2.1%	35
TOTAL		1,705

8. So far on this trip, how long have you been on Unama'ki - Cape Breton Island?

ANSWER CHOICES	RESPONSES
One day or less	28.0% 461
Two to three days	40.7% 670
Four to seven days	19.6% 323
One to two weeks	6.9% 114
More than two weeks	4.8% 79
TOTAL	1,647

9. How long in total are you planning on staying on Unama'ki - Cape Breton Island?

ANSWER CHOICES	RESPONSES
One day or less	6.6% 108
Two to three days	32.3% 528
Four to seven days	38.3% 627
One to two weeks	13.4% 220
More than two weeks	9.4% 153
TOTAL	1,636

10. Please estimate the amount you spend per day while on Unama'ki - Cape Breton Island (excluding lodging).

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Responses	197	309,972	1,572
Total Respondents: 1,572			

11. What tools did you use to plan your trip to Cape Breton? (Select all that apply.)

ANSWER CHOICES	RESPONSES
Internet research	77.3% 1,255
Online maps (e.g. Google Maps, Apple Maps etc.)	53.2% 864
Paper maps & road atlas	28.4% 461
Travel book or travel guide	20.5% 333
Other (please specify) Responses	15.6% 253
Social media accounts (e.g. YouTube, Instagram, Facebook, etc.)	12.8% 208
Travel booking website (e.g. Travelocity, Trivago, Expedia, etc.)	12.2% 198
Total Respondents: 1,623	

12. Has cell reception impacted your experiences on Unama'ki - Cape Breton Island?

ANSWER CHOICES	RESPONSES	
▼ Not at all a problem	50.6%	411
▼ Minor problem	32.6%	265
▼ Moderate problem	12.7%	103
▼ Serious problem	4.2%	34
TOTAL		813

13. While on Unama'ki - Cape Breton Island, have you encountered businesses that you would have visited but were closed?

ANSWER CHOICES	RESPONSES	
▼ Yes	29.6%	240
▼ No	70.4%	570
TOTAL		810

14. While on Unama'ki - Cape Breton Island, have you found it difficult to find open restaurants or other places to eat?

ANSWER CHOICES	RESPONSES	
▼ Yes	8.0%	65
▼ Occasionally	11.9%	96
▼ No	80.1%	649
TOTAL		810

15. What would bring you to visit Unama'ki - Cape Breton Island during the winter? (Select all that apply.)

ANSWER CHOICES	RESPONSES	
▼ Other (please specify)	Responses 5.4%	44
▼ Snowmobiling	6.2%	50
▼ Ice Fishing	6.2%	50
▼ Cross Country Skiing	7.4%	60
▼ Snowshoeing	7.7%	62
▼ Winter/Nordic Spa	7.7%	62
▼ Winter Tour Package	7.9%	64
▼ Downhill Skiing	8.9%	72
▼ Christmas Markets	9.7%	78
▼ Nothing would bring me to Cape Breton in the winter	62.6%	506
Total Respondents: 808		

16. What attractions, if any, helped motivate your decision to travel to Unama'ki - Cape Breton Island? (Select all that apply.)

ANSWER CHOICES	RESPONSES	
▼ The Cabot Trail	77.9%	625
▼ The Fortress Louisbourg National Historic Site	46.0%	369
▼ Outdoor Activities	28.3%	227
▼ The Bras d'Or Lake	23.4%	188
▼ Cape Breton Island Music & Culture	22.9%	184
▼ Alexander Graham Bell Museum	20.8%	167
▼ Whale Watching	15.8%	127
▼ Highland Village	13.2%	106
▼ Other (please specify) Responses	11.1%	89
▼ Music Festival(s)	8.6%	69
▼ Cape Breton Island Golf	3.1%	25
▼ None	1.1%	9
Total Respondents: 802		

17. What type of accommodations have you stayed in during your Unama'ki - Cape Breton Island trip? (Select all that apply.)

ANSWER CHOICES	RESPONSES	
▼ Hotel/Motel	43.8%	348
▼ Air B&B (Private Rental)	18.3%	145
▼ National or Provincial Park Campground	16.1%	128
▼ Inn or Bed and Breakfast	13.1%	104
▼ Private Campground	11.1%	88
▼ Friends/Relatives	9.7%	77
▼ Other (please specify) Responses	8.2%	65
▼ Have not overnighted in Cape Breton	0.9%	7
▼ Golf Resort	0.8%	6
▼ Geo Dome	0.4%	3
Total Respondents: 794		

18. What has been the most challenging parts of your Unama'ki - Cape Breton Island trip? (Select all that apply.)

ANSWER CHOICES	RESPONSES
Nothing	42.3% 322
Distance between locations	18.9% 144
Lack of cell reception	17.2% 131
Poor road conditions or road work	16.6% 126
Poor weather	10.6% 81
Closed businesses and restaurants	6.6% 50
Lack of direction signs on the roads	6.6% 50
Lack of accommodations	3.5% 27
Poor restaurant quality	2.5% 19
Lack of activities /events	1.7% 13
Total Respondents: 761	

19. Have you participated in, or are you planning on participating in, an Indigenous cultural experience on Unama'ki - Cape Breton Island?

ANSWER CHOICES	RESPONSES
No	63.2% 489
Yes	19.1% 148
I'm not sure	17.7% 137
TOTAL	774

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

ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Responses	9	7,340	791
Total Respondents: 791			
BASIC STATISTICS			
MINIMUM	MAXIMUM	MEDIAN	MEAN
4.00	10.00	10.00	9.28
			STANDARD DEVIATION
			1.06