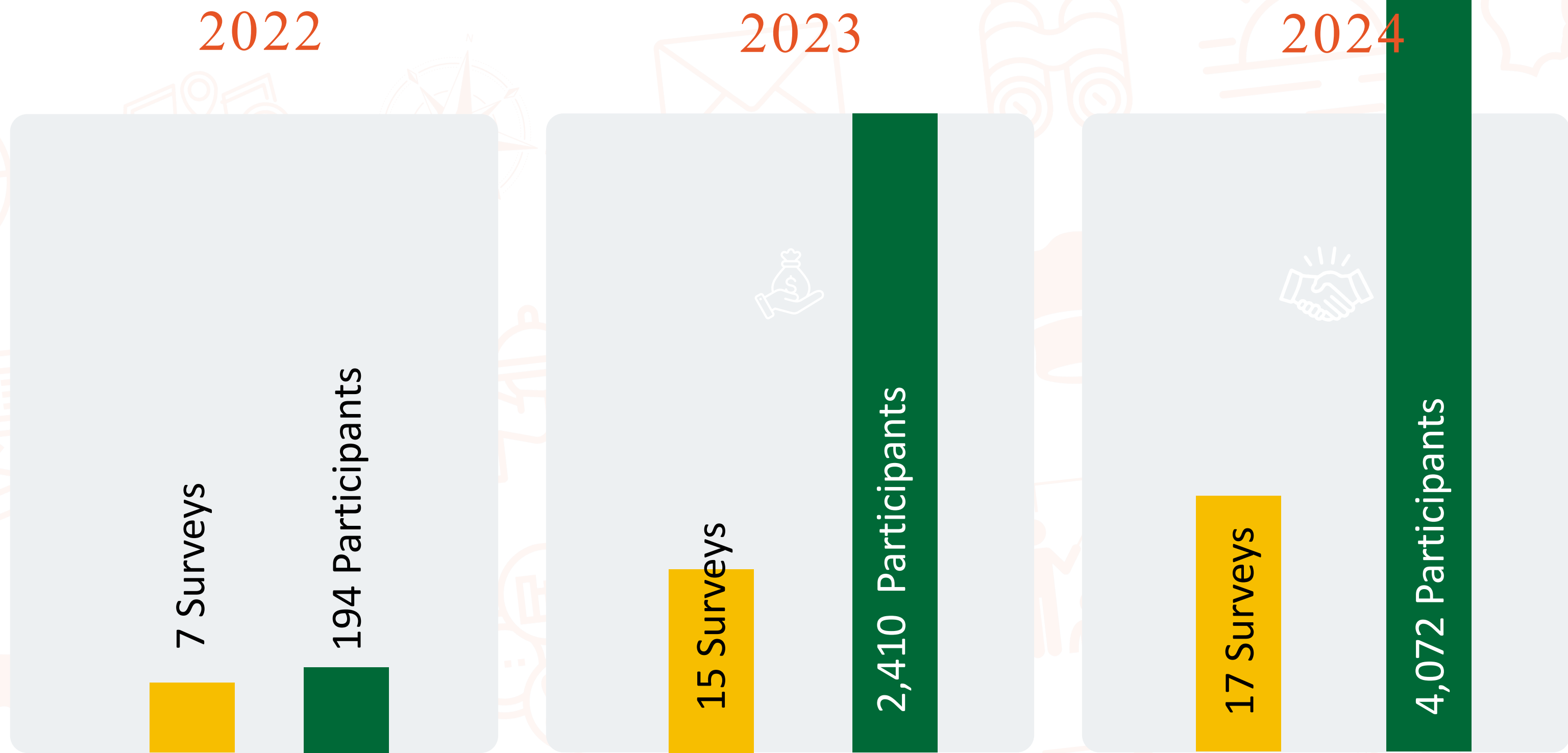


# TOURISM RESEARCH

# CBITTN - 2024 RESEARCH PROJECTS

# Dr. Darren Downing, EdD



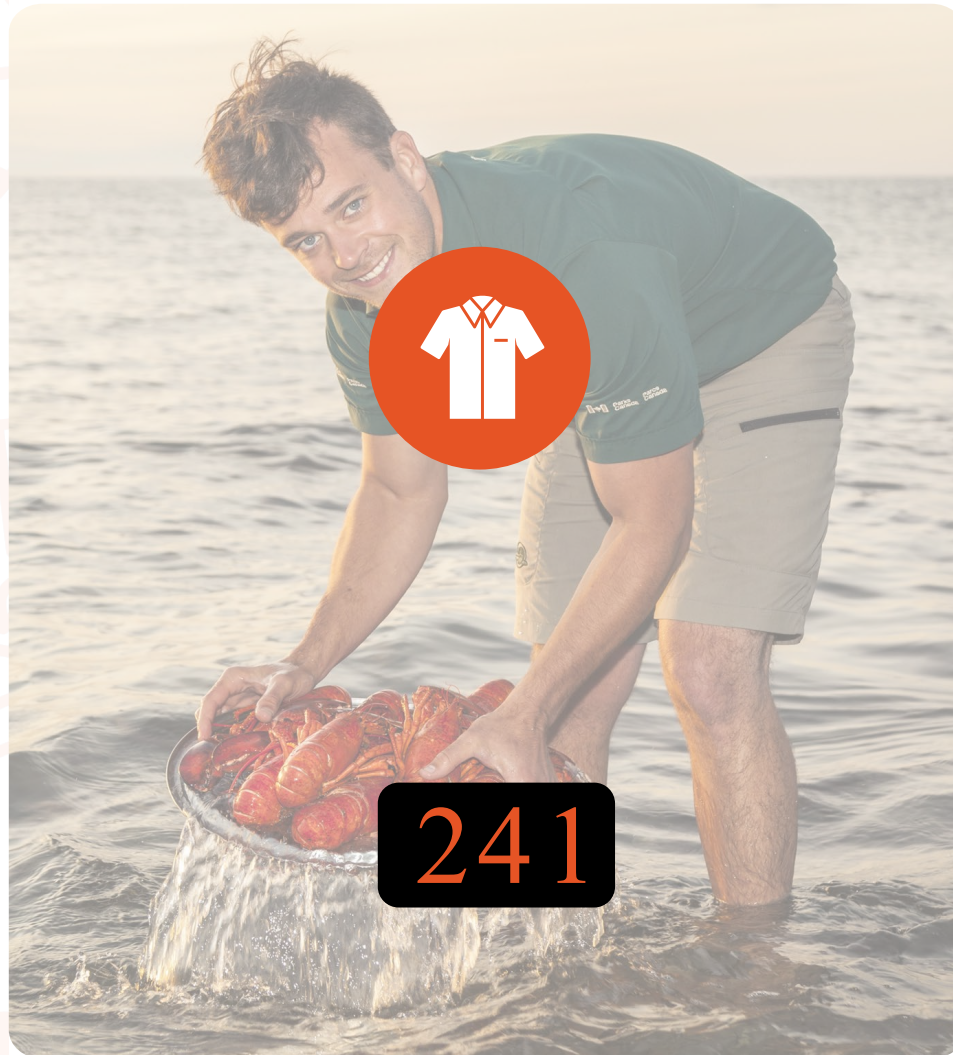


# CBITTN Research by the Numbers



# 2022 – 2024 Research Participants

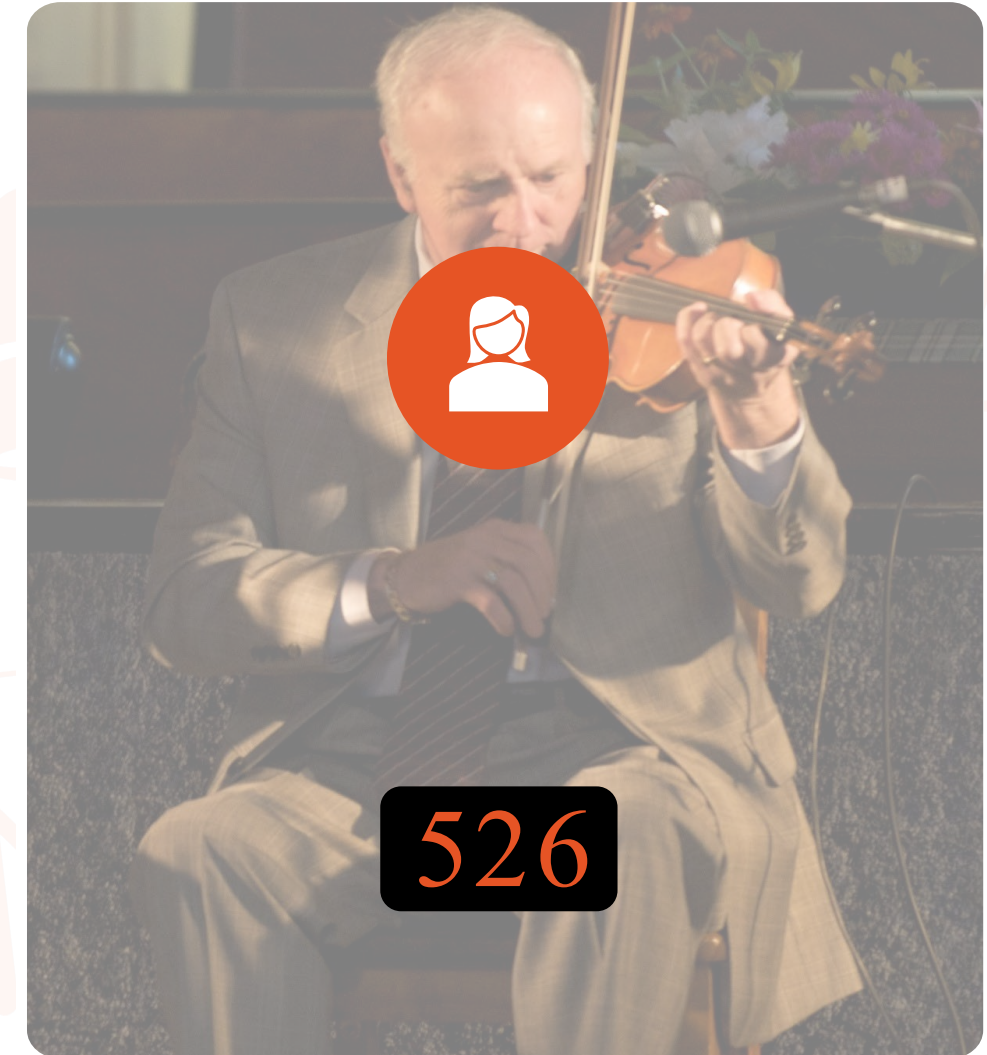
Total Tourism  
Industry



Total Visitors



Other Related



## CBITTN Research by the Numbers

# CBITTN Research Projects

## Annual Visitor Experience Project

- General Survey
- Membertou Heritage Park Survey
- Baddeck Area Business Tourism Association Survey
- Ski Cape Smokey Survey
- Highland Village Survey
- Miners Museum Survey
- 1,804 Visitors in 2024

## Annual Cruise Ship Passenger Experience Project

- 2022 Survey- 74 Participants
- 2023 Survey–590 Participants
- 2024 Survey–1,081 Participants

## Cape Breton Island Music Industry Project

- 261 Music Event Attendees
- 119 CBI Musicians
- 23 Other Members of the Music Industry
- 22 Business Owners Located Near Venues

## Operator Gap Research

- Two Surveys
- 70 Operators Participated

## CBU BHTM Student's Future Plans Project

- Two surveys 10 months apart
- 316 BHTM Students participated

## Partner Research Projects

- Cape Breton Partnership Economic Impact Studies
- Cape Breton Partnership Electric Vehicle Charging Station Study
- 2023/2024 Celtic Colours Visitor Surveys



# 2024 Research Assistants

## Cape Breton University MBA Students

- Feng Wang “Chelsea”
- Huixin Shen “Annie”
- Tao Wang
- Juan Wan





# Other Resources



Environics - Envision



Canadian Tourism Data  
Collective



Cape Breton Island Tourism  
Case Studies



# Research Highlights



Summer 2024 Visitor Experience Survey



2024 Cruise Ship Passenger Survey



CBI Music Industry Research Project



Envision Visitor Profiles (DCB)



Canadian Tourism Data Collective (DCB)





# Research Highlights



Summer 2024 Visitor Experience Survey



2024 Cruise Ship Passenger Survey



CBI Music Industry Research Project



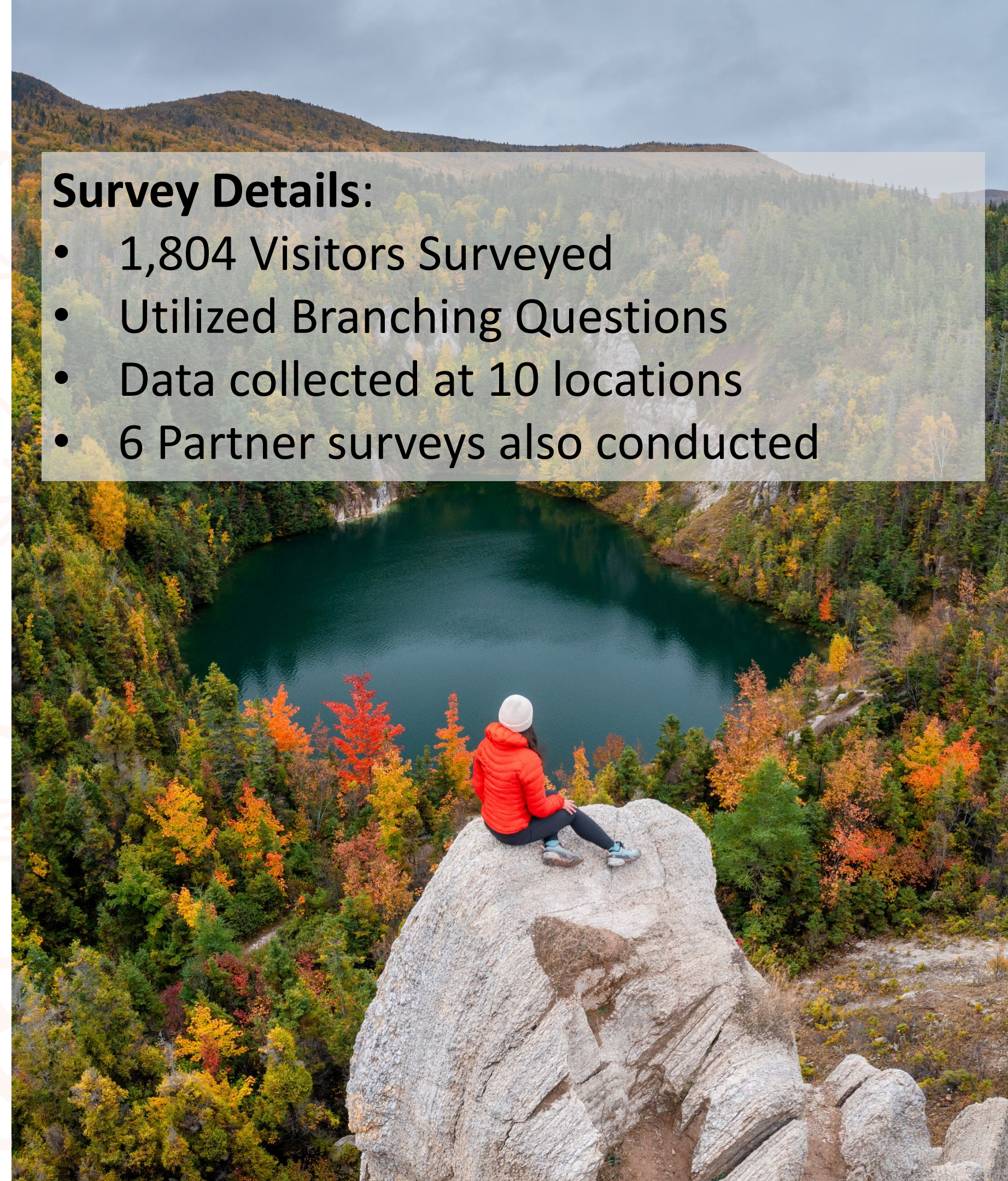
Envision Visitor Profiles (DCB)



Canadian Tourism Data Collective (DCB)

## Survey Details:

- 1,804 Visitors Surveyed
- Utilized Branching Questions
- Data collected at 10 locations
- 6 Partner surveys also conducted





# Research Highlights

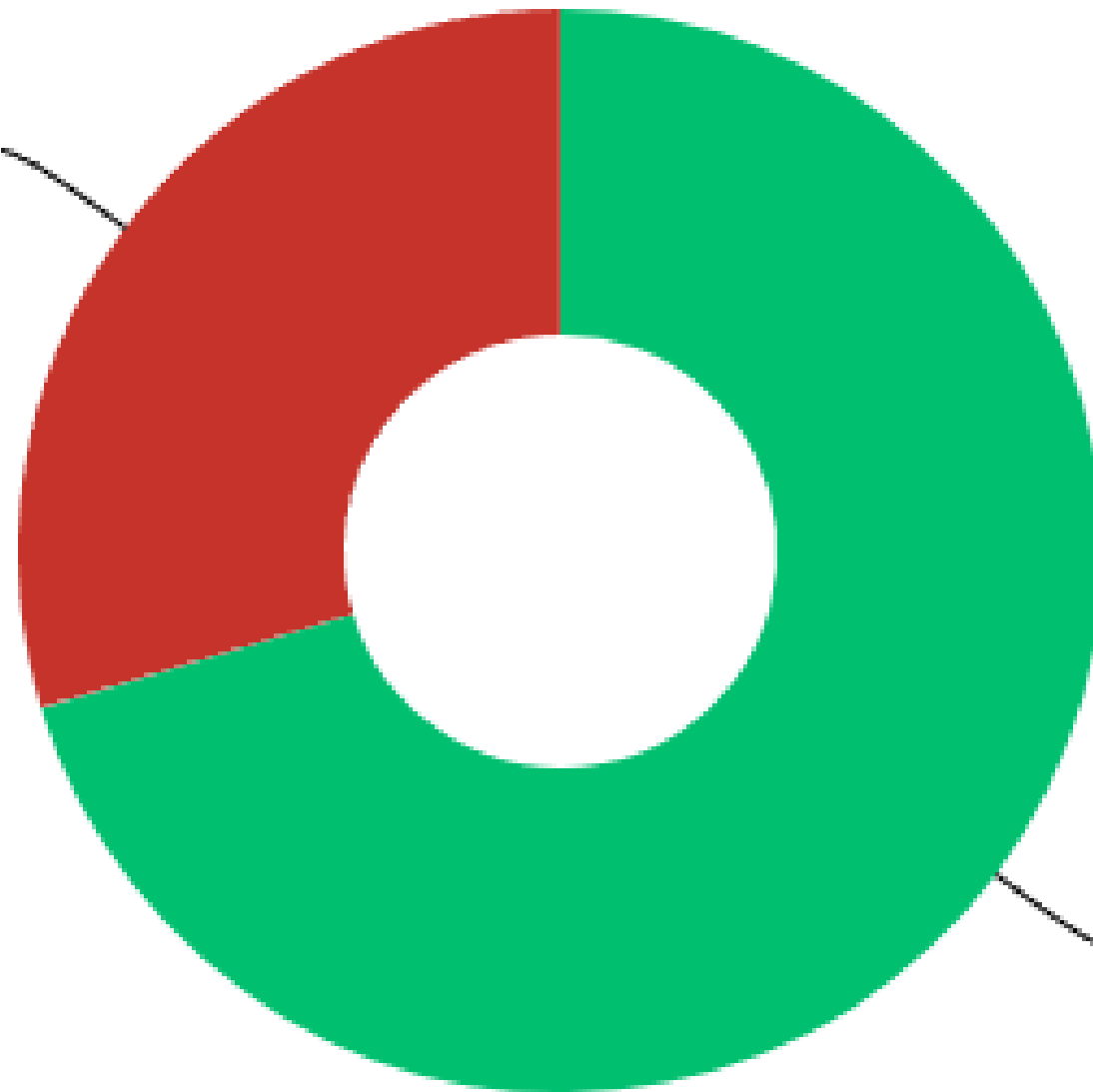
70% of survey participants were first time visitors to Cape Breton Island

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

Answered: 1,713    Skipped: 94

No 29.7% (508)

Yes 70.3% (1205)

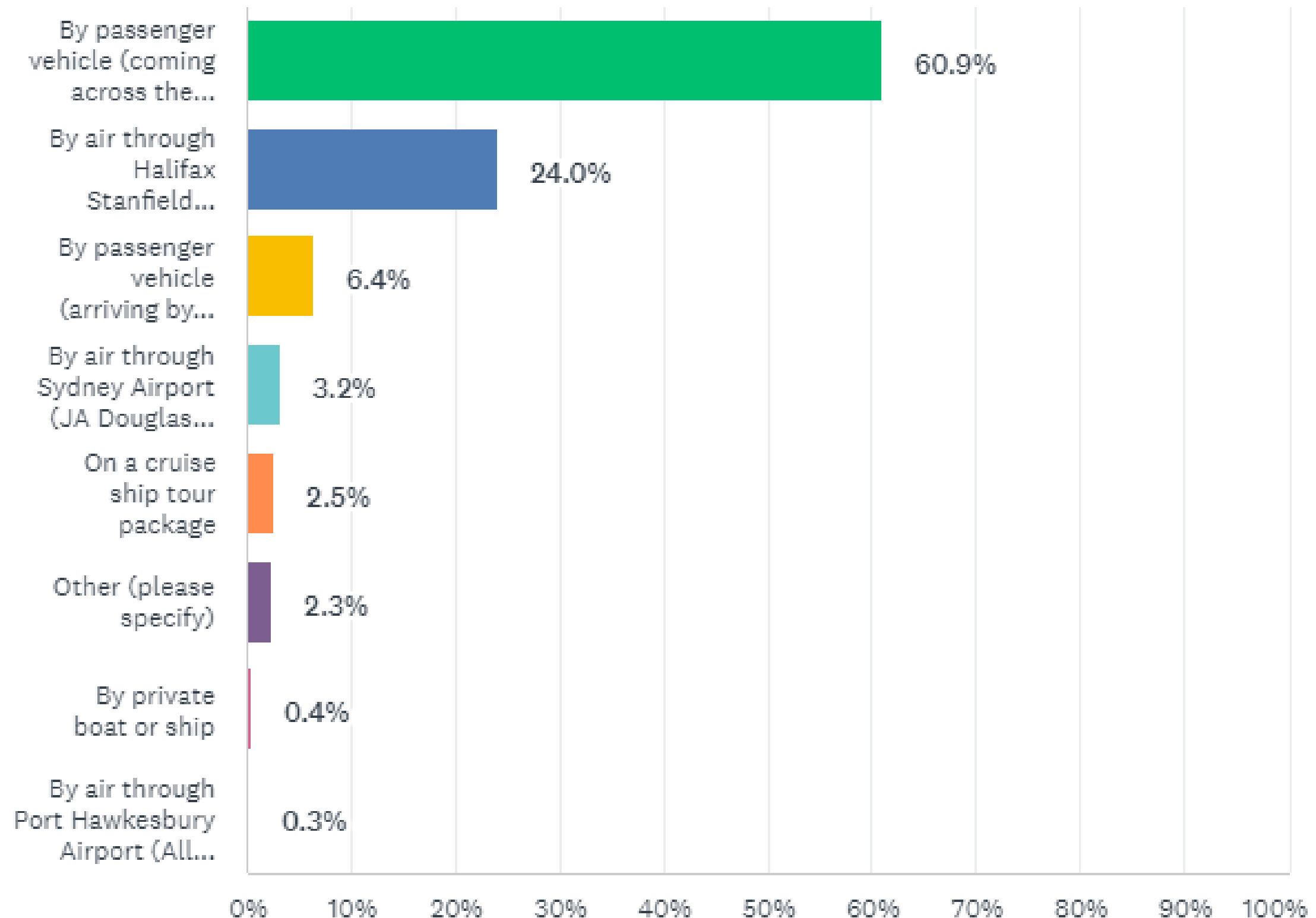


# Research Highlights

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

Answered: 1,711 Skipped: 96

85% of visitors arrive by crossing the causeway





# Research Highlights

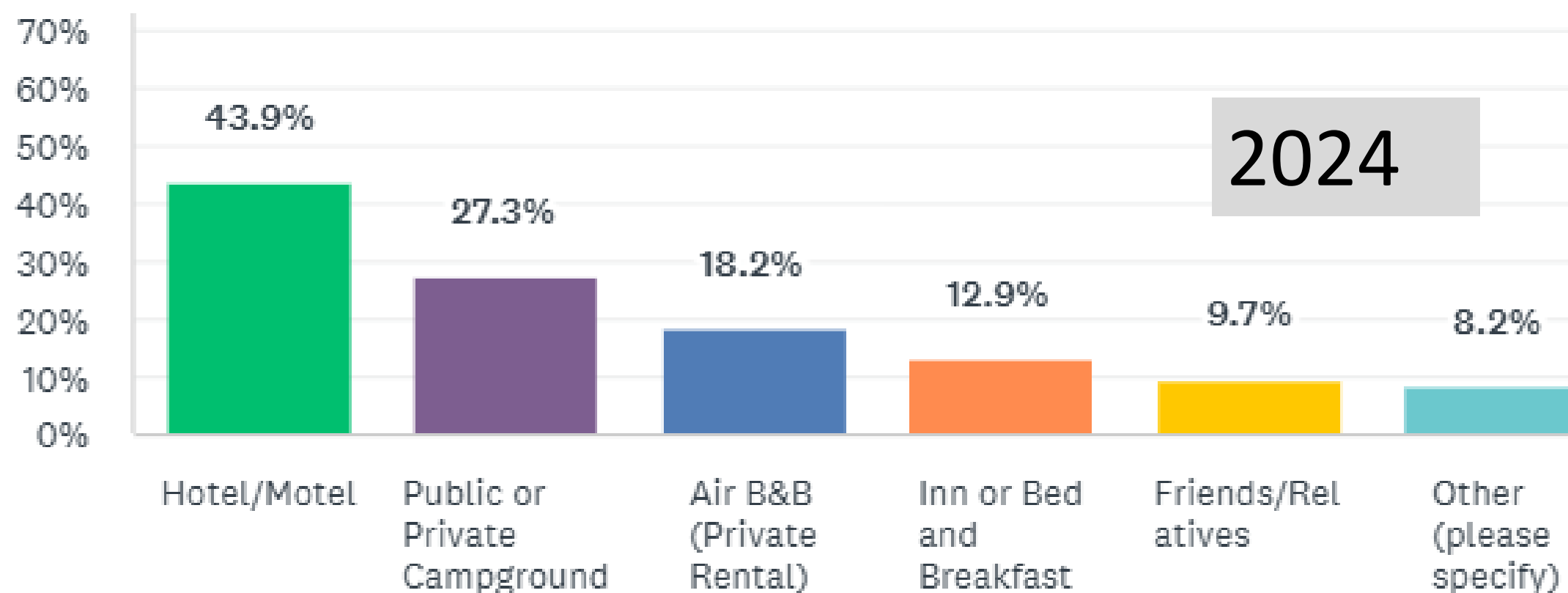
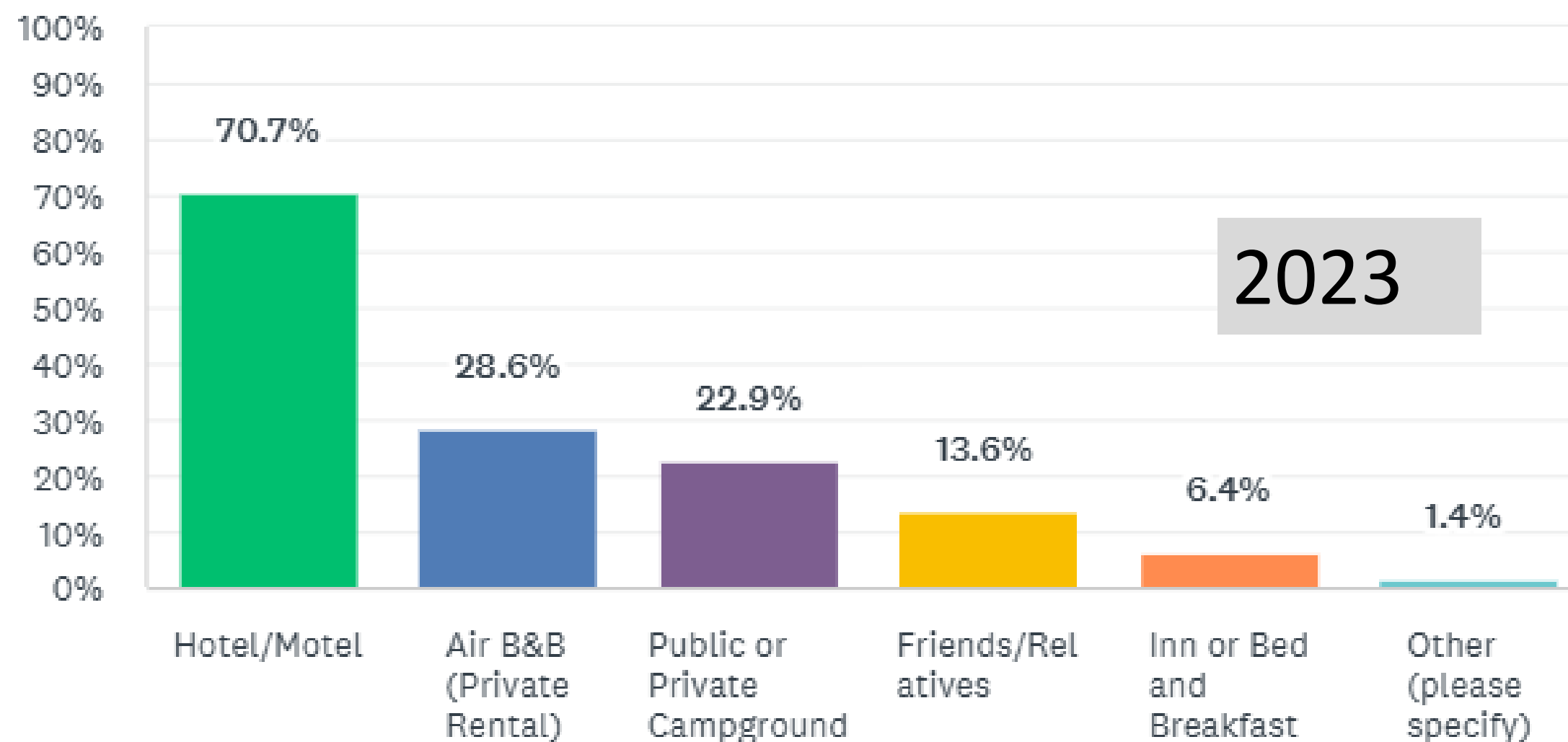
79.1% of impressions on when driving across the causeway were positive, 18.1% were neutral.

windy Breath taking wild glad back LOVE sure landscape Calm Unique s Incredible Ocean  
Wow historic big Convenient Quiet Beau gorgeous Quaint Picturesque big island  
Lovely remote Historical clean Beauty small happy excellent  
breathtaking informative Awesome Vast nature Majestic  
scenery trees Pretty Natural beauty friendly Amazingly  
Home Feel amazing place nice Forest  
Beautiful lots Scenic Ok excited fun  
peaceful excitement impressive dark good people  
interesting drive view mountains green Slow great Fabulous  
natural special stunning nice beautiful Wonderful Beautiful amazing  
Magnificent noticed Fantastic back Spectacular culture rugged Really road  
relaxing Welcoming cool water Absolutely peace Beautiful nice easy coming home fine  
cabot trail island

# Research Highlights

In 2024, more visitors camped and fewer stayed at hotels or motels compared to 2023.

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





# Research Highlights

Approximately 1/3 of visitors participate in Indigenous Cultural Experiences.



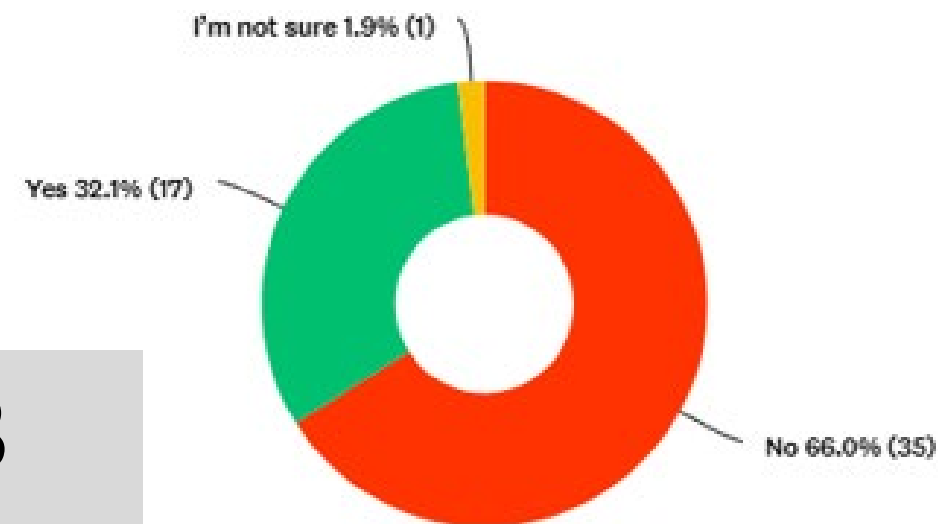
Have you participated in an Indigenous tourism experience on Cape Breton Island?

Answered: 53 Skipped: 0



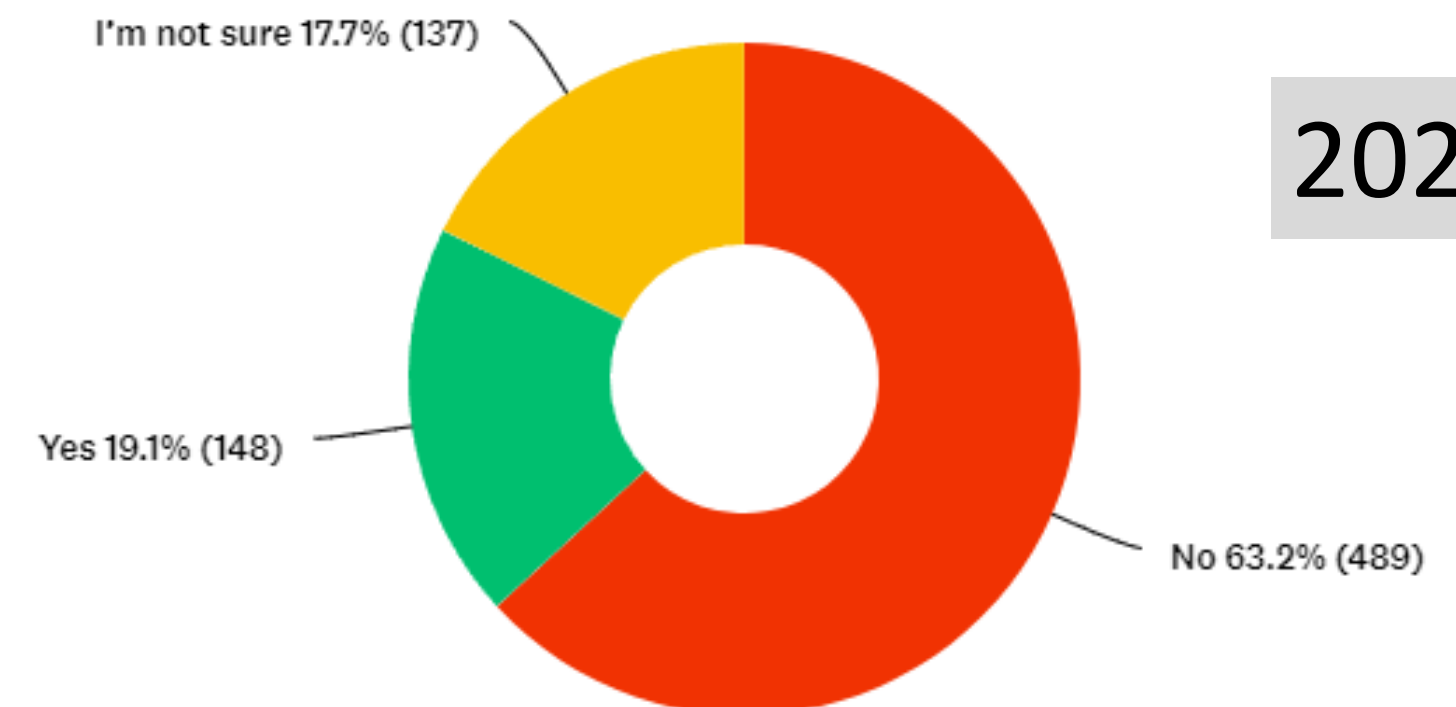
2023

(Four or more days on island)



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



2024

# Research Highlights

43% of visitors would have visited a business but it was closed.  
21% of visitors sometimes had trouble finding a place to eat.



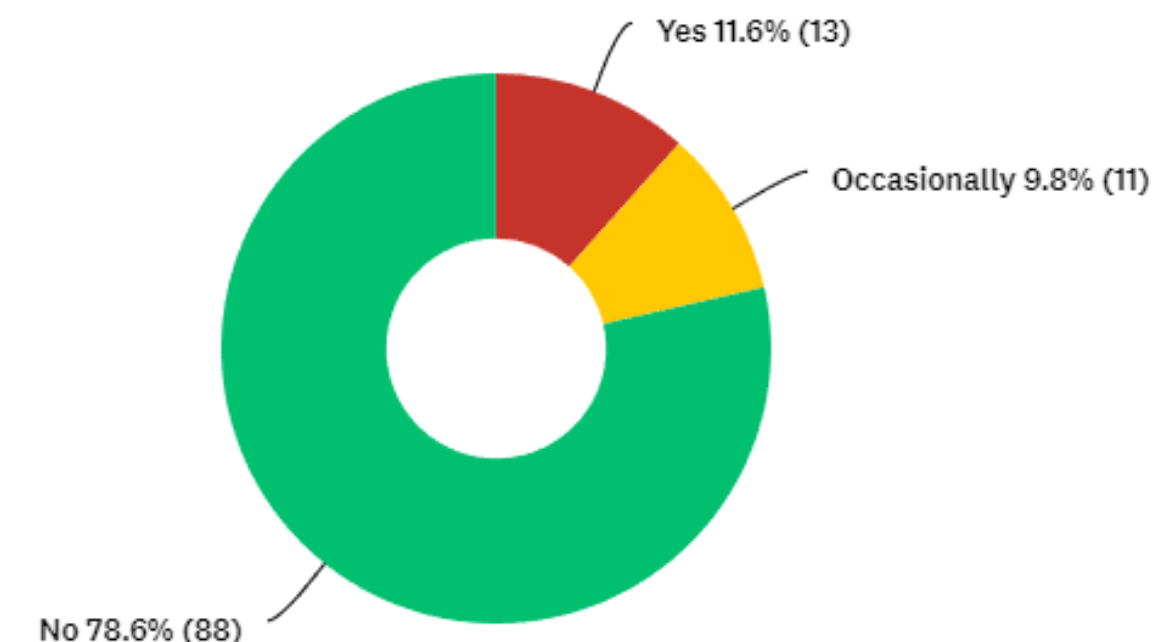
While on Unama'ki - Cape Breton Island, have you encountered businesses that you would have visited but were closed?

Answered: 112 Skipped: 81



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

Answered: 112 Skipped: 81



2024  
(One week  
or more on  
island)



# Research Highlights



Summer 2024 Visitor Experience Survey



2024 Cruise Ship Passenger Survey



CBI Music Industry Research Project



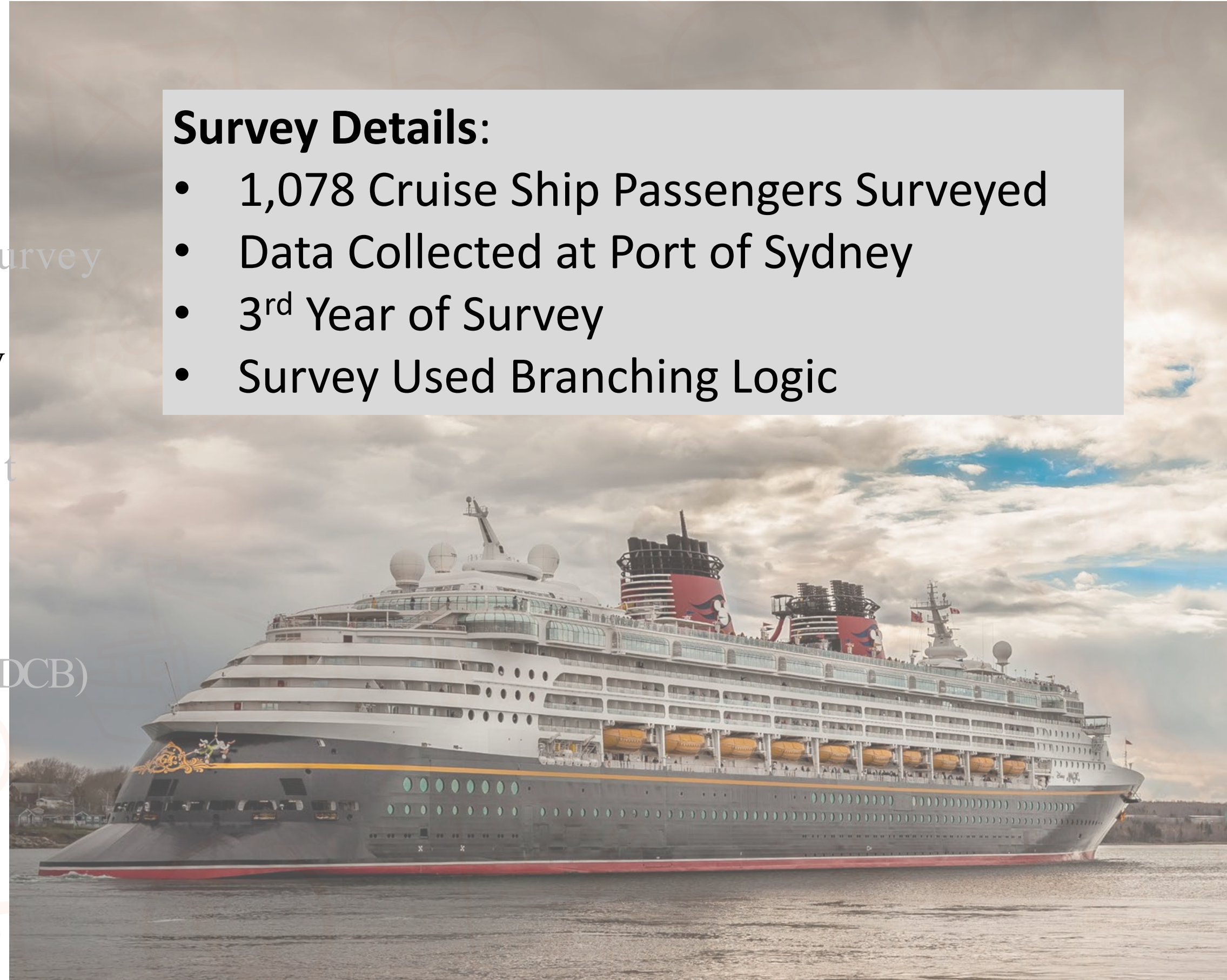
Envision Visitor Profiles (DCB)



Canadian Tourism Data Collective (DCB)

## Survey Details:

- 1,078 Cruise Ship Passengers Surveyed
- Data Collected at Port of Sydney
- 3<sup>rd</sup> Year of Survey
- Survey Used Branching Logic





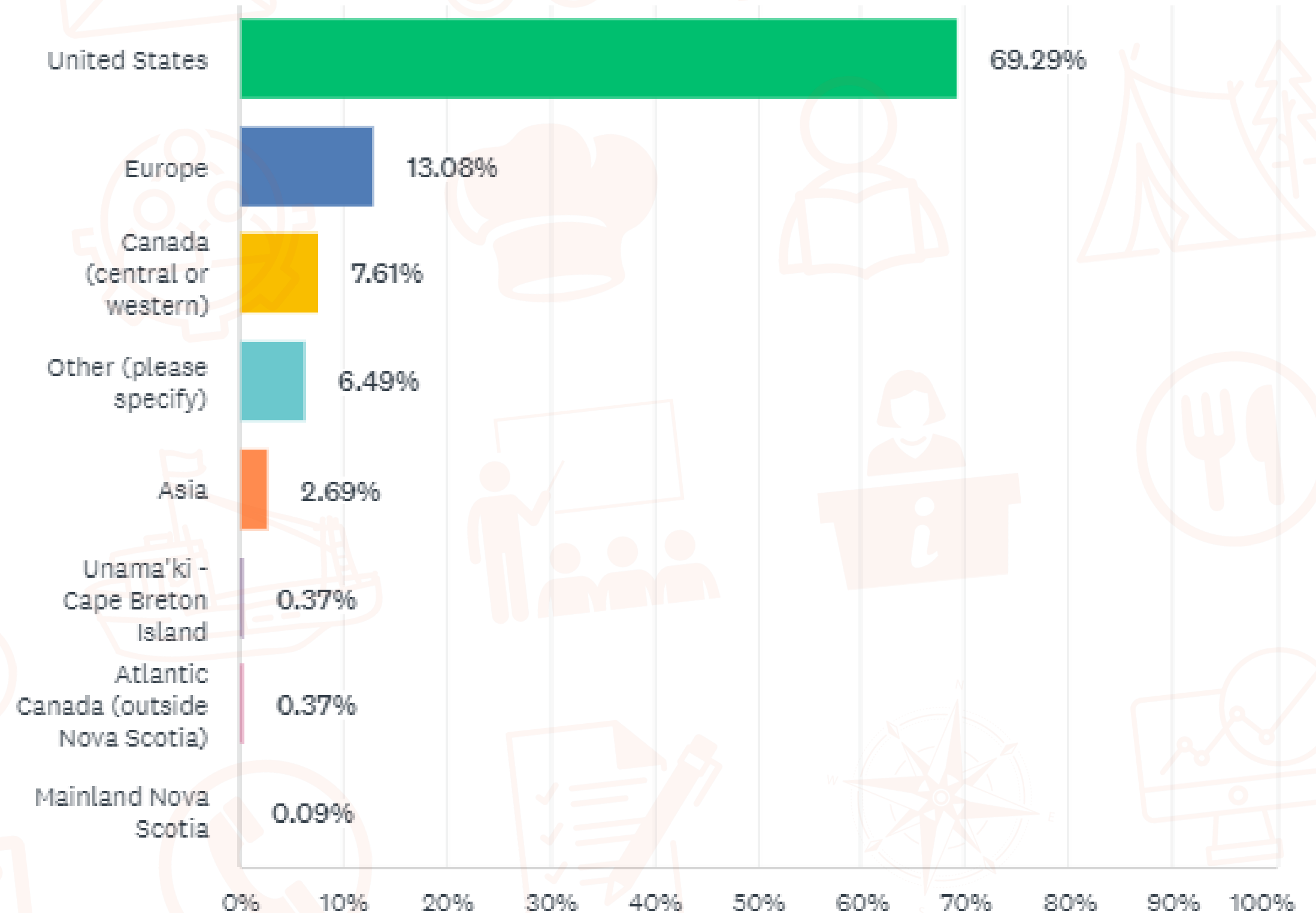
# Research Highlights

Where are you from?

Answered: 1,078

Skipped: 3

Almost 70% of  
Cruise Ship  
Passengers are  
from the US.



# Research Highlights

Almost 75% of cruise ship passengers explored on their own. Of those, 89% remained in Sydney. 90% of those explored on foot.

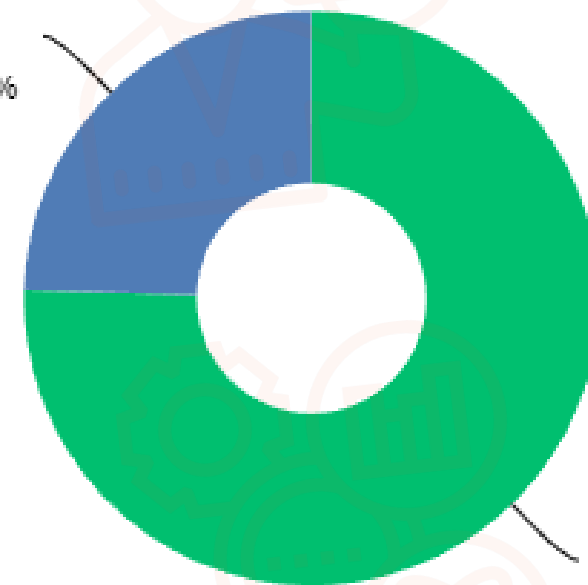


Were you part of an organized pre-arranged tour on Cape Breton or did you explore Cape Breton on your own?

Answered: 1,067 Skipped: 14



Part of an organized pre-arranged tour. 24.55% (262)

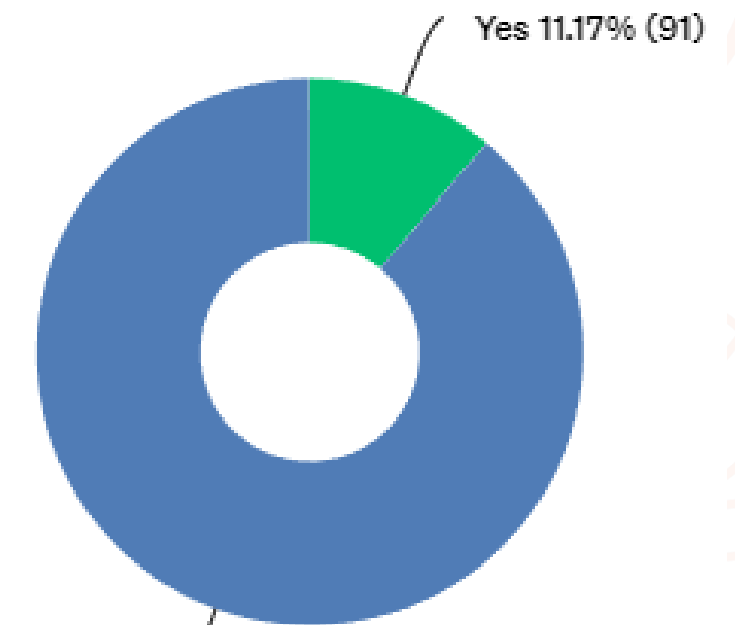


Explored on own. 75.45% (805)



Did you explore outside of Sydney?

Answered: 815 Skipped: 266



No 88.83% (724)



# Research Highlights

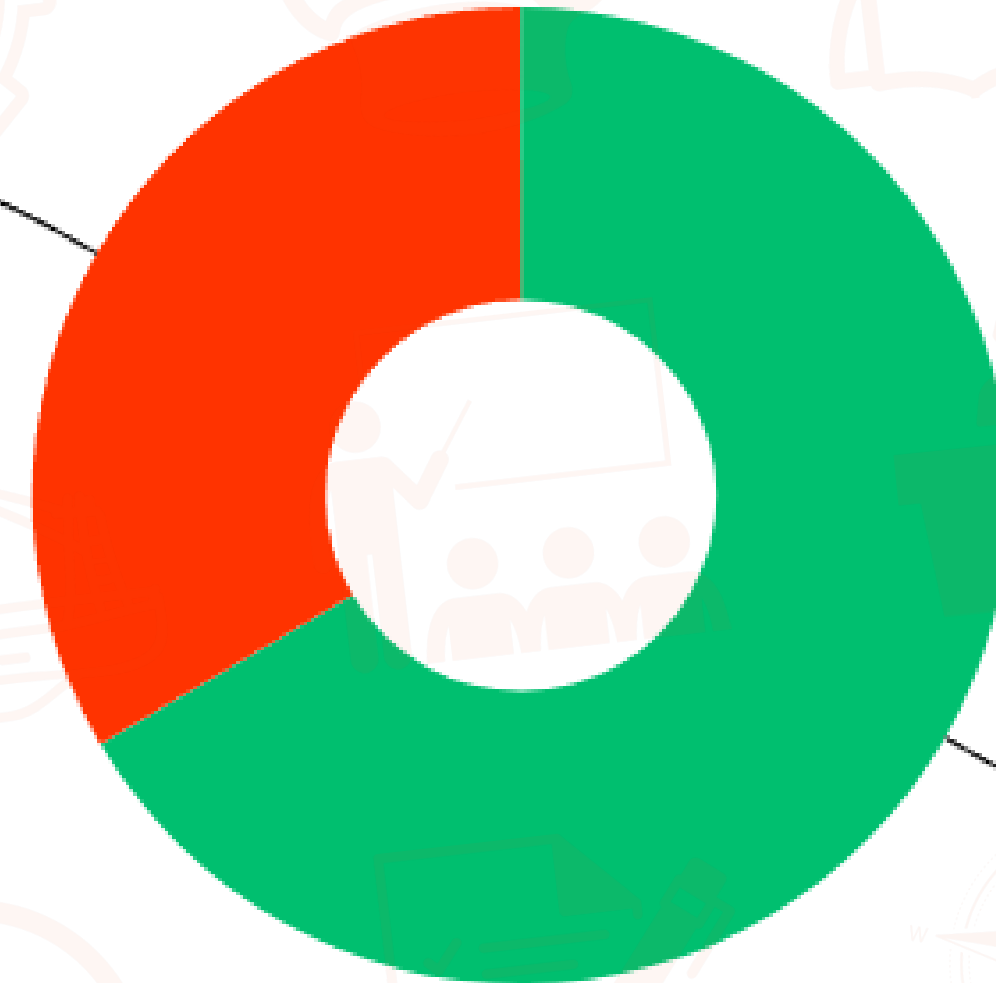
2/3 of cruise ship passengers purchased souvenirs.

Did you purchase any souvenirs while on Cape Breton Island?

Answered: 1,063 Skipped: 18

No 33.49% (356)

Yes 66.51% (707)





# Research Highlights

18% of cruise ship passengers encountered closed businesses that they would have visited.



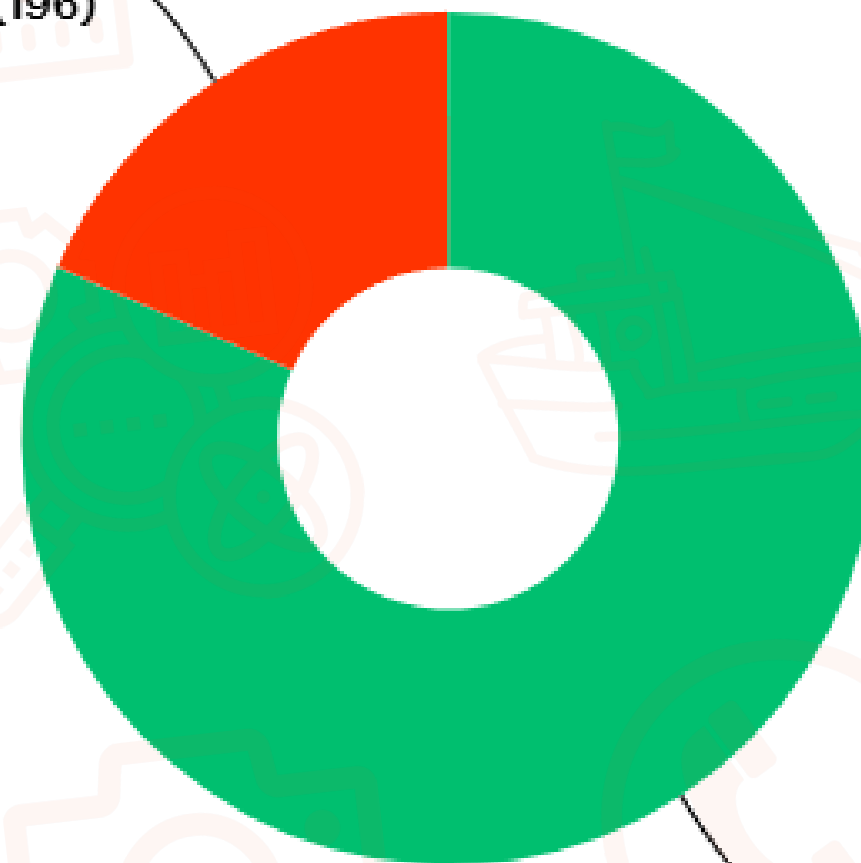
During your travels in Cape Breton, did you encounter businesses that you would have visited but were closed?



Answered: 1,065 Skipped: 16



Yes 18.40% (196)



No 81.60% (869)





# Research Highlights



Summer 2024 Visitor Experience Survey



2024 Cruise Ship Passenger Survey



CBI Music Industry Research Project



Envision Visitor Profiles (DCB)



Canadian Tourism Data Collective (DCB)

## Research Details:

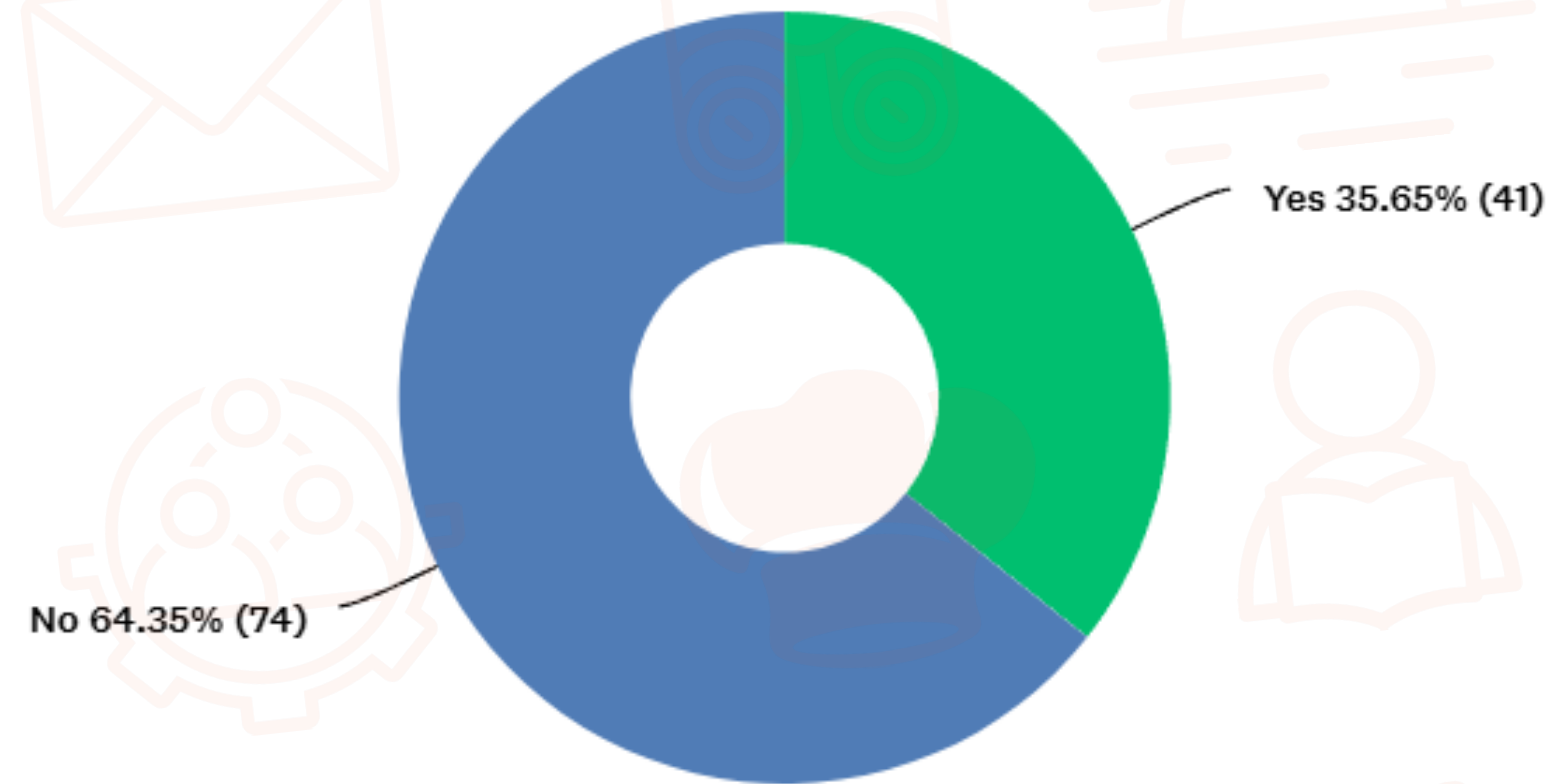
- Music Industry Experts
  - Jennifer Currie (CBU)
  - Shauna Walters
- Five Sources of Data
  - Musician Survey (120 Responses)
  - Music Event Attendee Survey (261 Responses)
  - Business Owners Near Venues Survey (22 Responses)
  - Music Industry Survey (25 Responses)
  - Qualitative Musician Interviews (19 Participants)



# Research Highlights

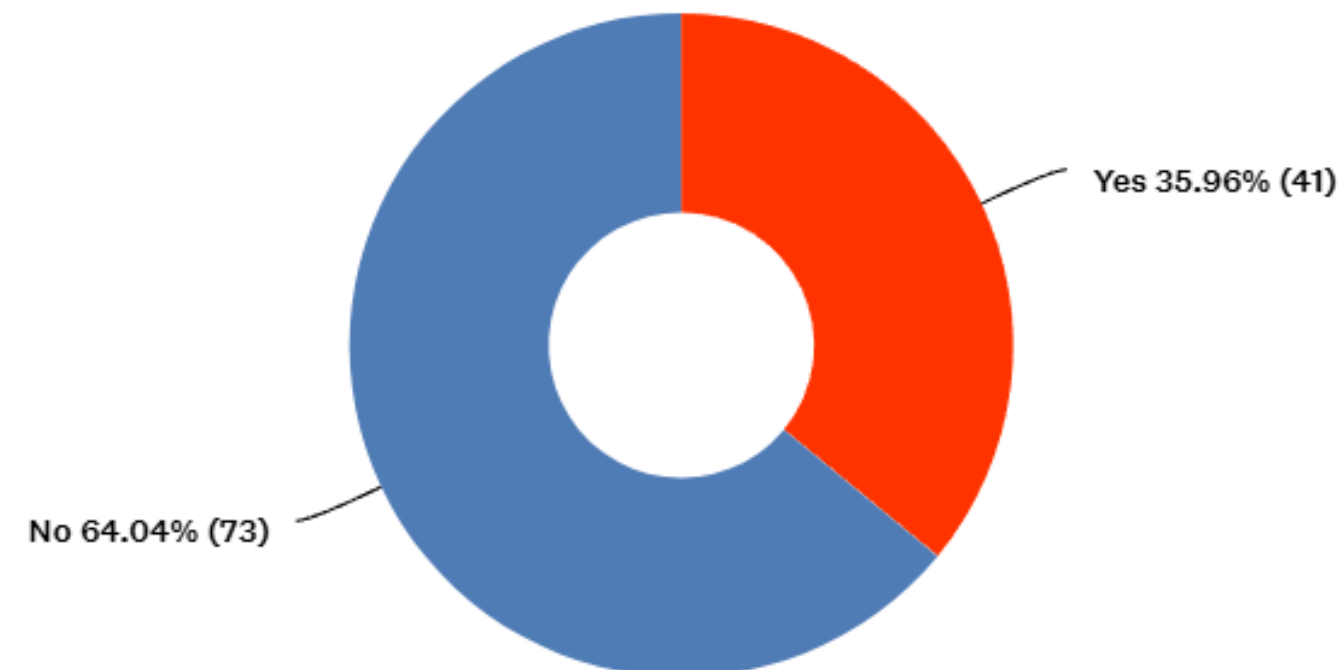
Have you, or are you considering leaving Cape Breton to further your music career?

Answered: 115 Skipped: 5



Have you ever considered leaving the music industry?

Answered: 114 Skipped: 6



36% of Cape Breton musicians have left or have considered leaving the island to further their careers. The same percentage have considered leaving the music industry.

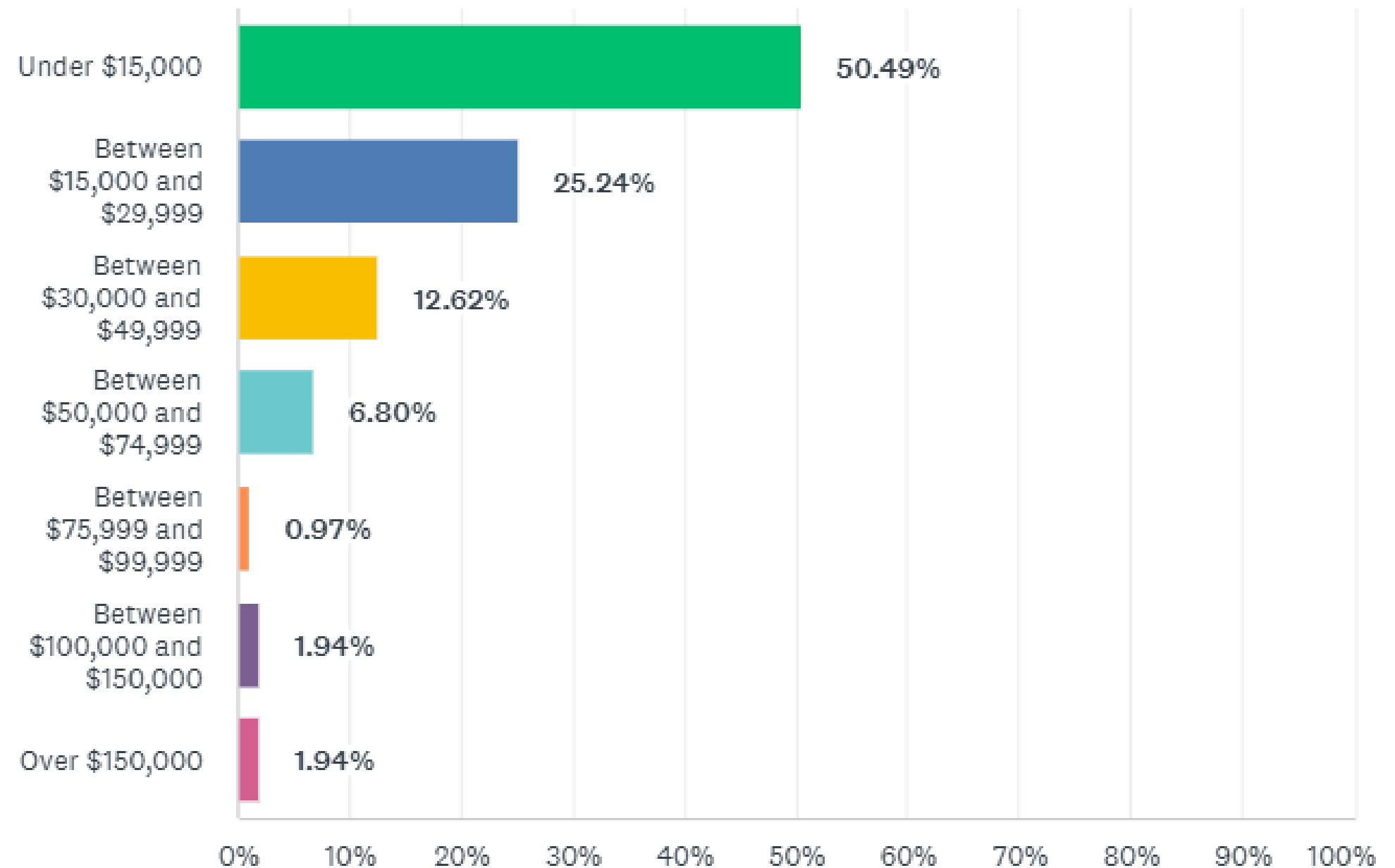


# Research Highlights

75% of Cape Breton musicians made less than \$30,000 from their music in 2023.

Approximately how much did you make last year from music and music-related sources?

Answered: 115   Skipped: 5



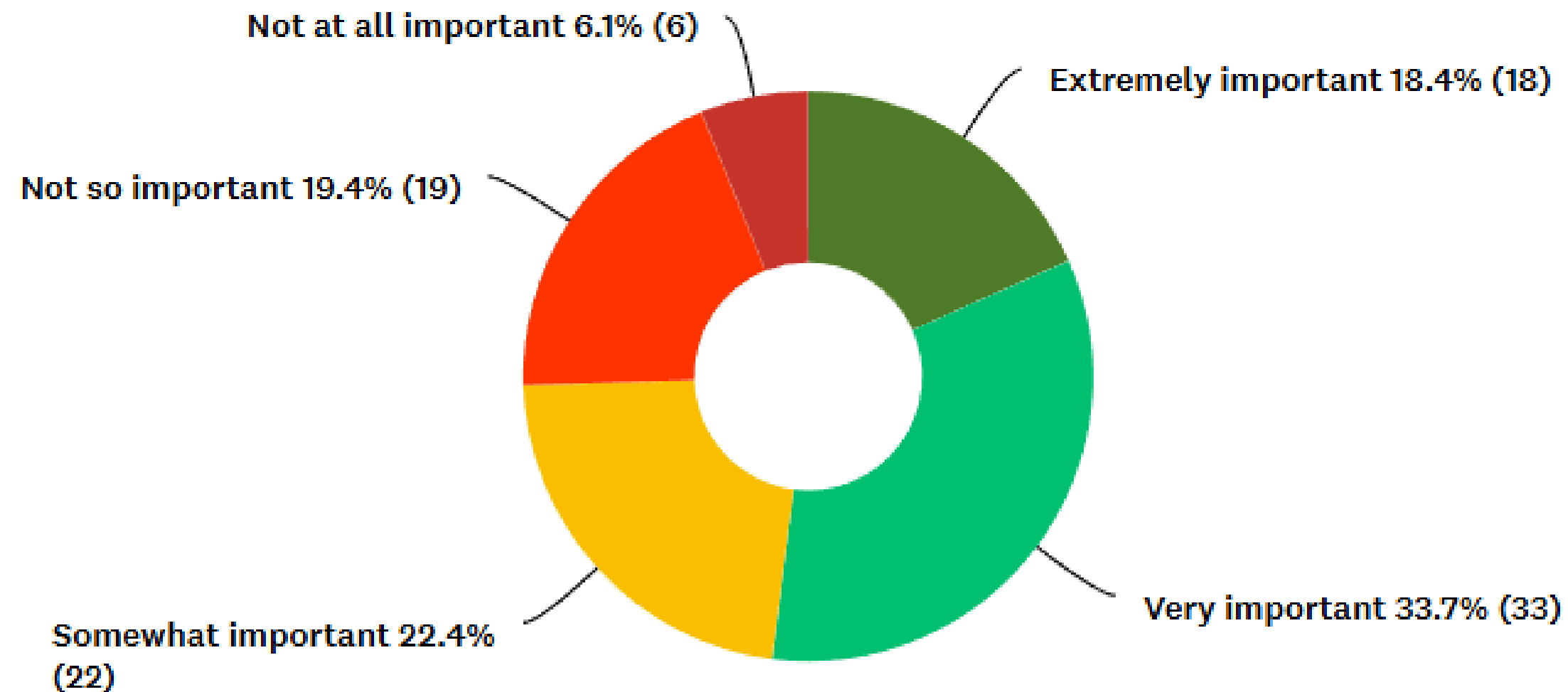


# Research Highlights

26% of music event attendees attended a Cape Breton Island music event despite music not being a motivating factor for visiting the island.

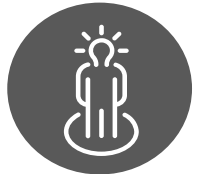
How important was Cape Breton Island music in brining you to Cape Breton?

Answered: 98   Skipped: 163





# Research Highlights



38% of music event attendees would stay on the island for longer if there were more opportunities to attend music events.

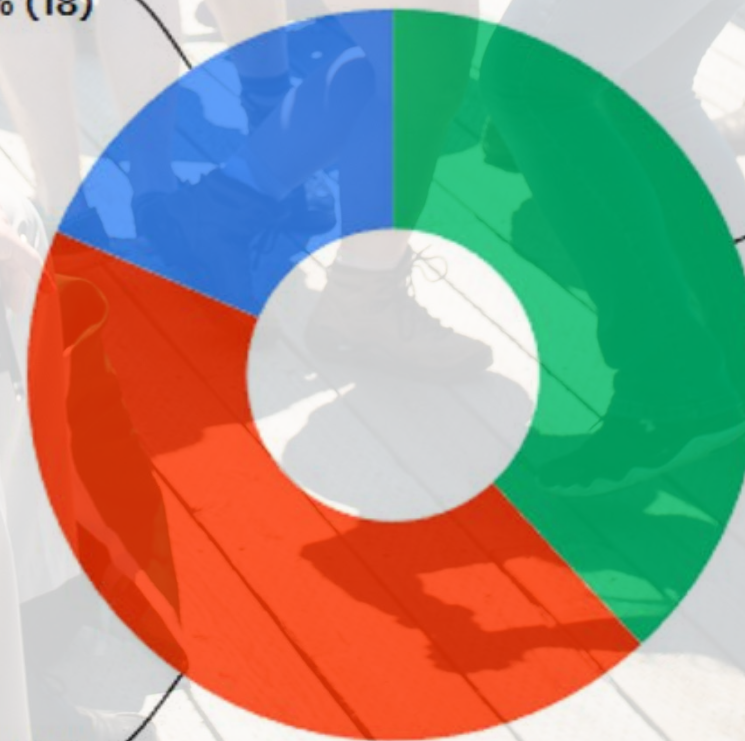
Would you likely remain on Cape Breton for longer if there were more opportunities to attend music events?

Answered: 97 Skipped: 164

I'm not sure 18.6% (18)

Yes 38.1% (37)

No 43.3% (42)



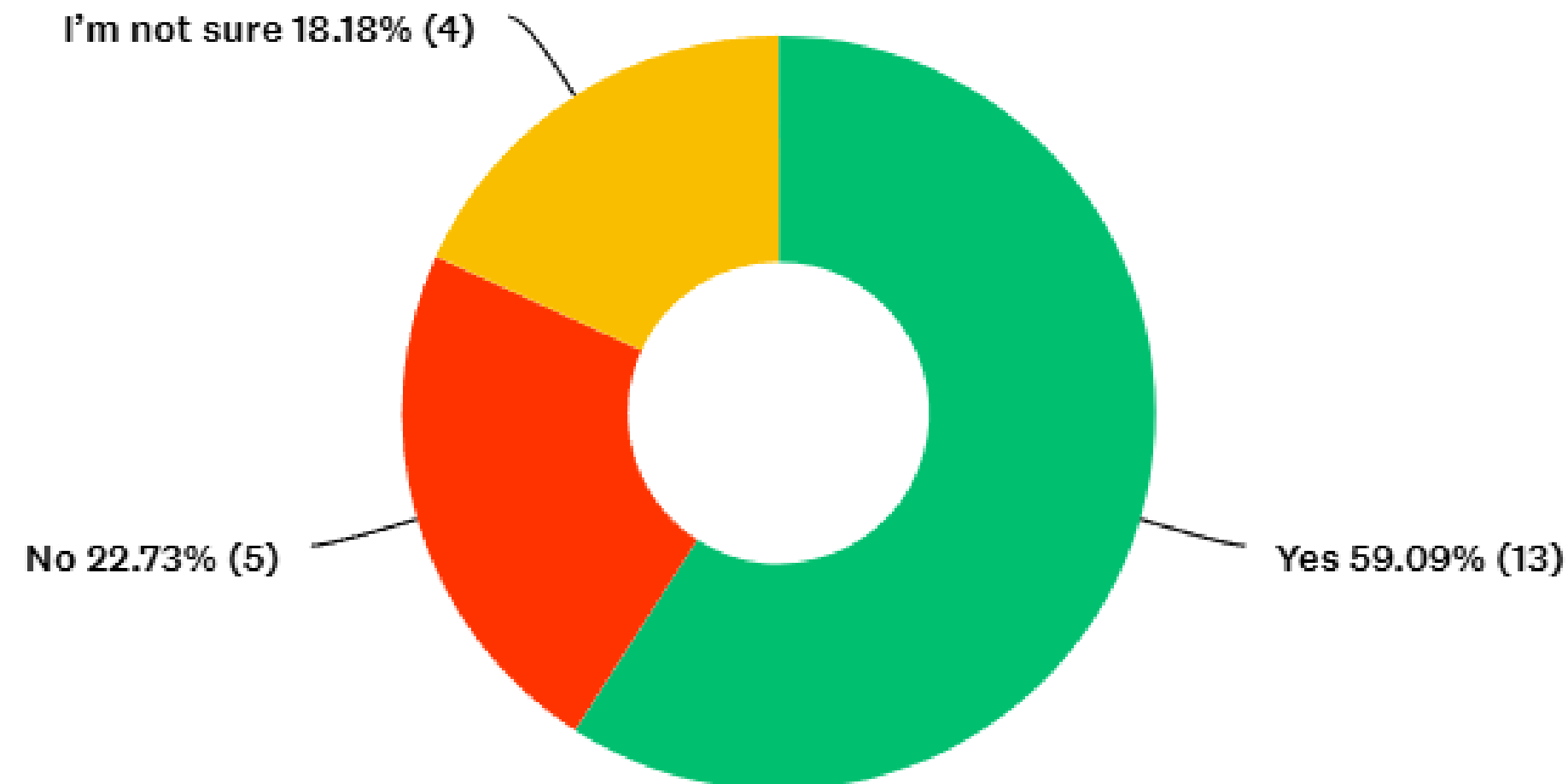


# Research Highlights

Not including lodging or admission, music event attendees report spending an average of \$108 in the communities where the music event is held.

Do you notice an increase in revenue on days when there is a music event compared to days when there is not a music event?

Answered: 22 Skipped: 0



Businesses near venues report an average of 38% increase in revenue on days where there is a music event.



# Research Highlights



Summer 2024 Visitor Experience Survey



2024 Cruise Ship Passenger Survey



CBI Music Industry Research Project



Envision Visitor Profiles (DCB)



Canadian Tourism Data Collective (DCB)



## Tool Details:

- Environics Analytics
- Subscribed to by Destination Cape Breton
- Uses Geolocation (Cell Tower) Data
- Geofencing of Areas (Golf Greens, Breweries, etc.)
- Executive Dashboard Overviews

## Tools:

- Segmentation (67 Consumer Segments)
- Demographics
- Psychographics
- Behavioural



# Research Highlights



**Back  
Country  
Boomers**  
Rank - 1  
22.6% of  
Visitors



## Preferred Social Media

Pinterest, Facebook, Blogs



## Influencer Impact

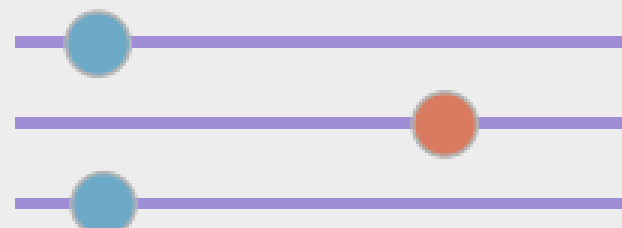
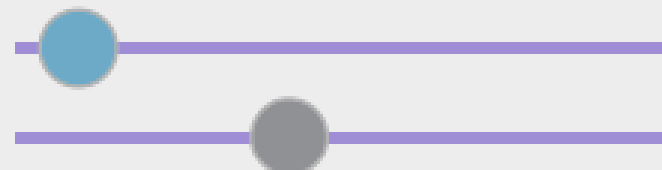
### Likely to Be Influenced by:

Celebrity

Online product review

Online influencer when:

- accepting opinion
- considering recommendation
- purchasing



Low

High

## Visitors Crossing the Causeway

Top 5 Segments Represent 56.4% of Visitors

49

**BACKCOUNTRY  
BOOMERS**



**R2** LOWER-MIDDLE  
RURAL

MATURE  
SINGLES  
& COUPLES **M2**

Rural, lower-middle-income older couples  
and singles



# Research Highlights

## Visitors Crossing the Causeway

Top 5 Segments Represent 56.4% of Visitors



### Down to Earth

Rank - 2  
11.5% of  
Visitors



### Preferred Social Media

Pinterest, Facebook, YouTube



### Influencer Impact

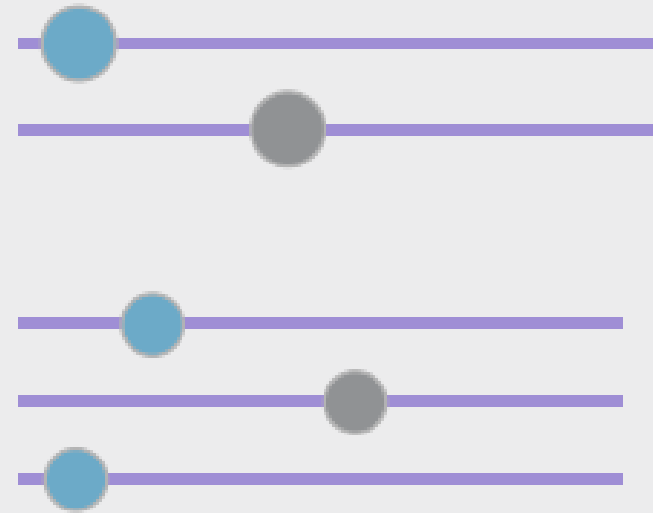
#### Likely to Be Influenced by:

Celebrity

Online product review

Online influencer when:

- accepting opinion
- considering recommendation
- purchasing



Low

High



**R2** LOWER-MIDDLE  
RURAL

OLDER  
FAMILIES  
& EMPTY NESTS **M1**

Older, middle-income rural couples  
and families



# Research Highlights

## Visitors Crossing the Causeway

Top 5 Segments Represent 56.4% of Visitors

**Old Town Roads**  
Rank - 3  
8.5% of Visitors



### Preferred Social Media

Pinterest, Facebook, YouTube



### Influencer Impact

#### Likely to Be Influenced by:

Celebrity

Online product review

Online influencer when:

- accepting opinion
- considering recommendation
- purchasing



58

**OLD TOWN  
ROADS**



**T1** TOWN MIX

OLDER FAMILIES  
& EMPTY NESTS **M1**

Older, lower-middle-income  
town couples and singles



# Research Highlights

**Executive Dashboards**  
Use Geolocation Data  
Benchmarked against Canada

**Visitors Crossing the Causeway**  
Behavioural – Numeris  
Sports & Leisure Overview

## Top Local Attractions & Destinations\*\*

Specialty movie theatres



**23.2%**

Index: 189

Historical sites



**22.8%**

Index: 157

Beer/food/wine festivals



**5.9%**

Index: 180

## Top Concert & Theatre Venues\*\*

Theatre - Community theatres



**6.3%**

Index: 181

Theatre - Other venues



**6.1%**

Index: 177

Theatre - Festivals



**7.5%**

Index: 174

## Top Activities

Whale watching



**15.8%**

Index: 231

ATV/snowmobiling



**20.6%**

Index: 164

Fishing/hunting



**30.2%**

Index: 132



# Research Highlights

## Visitors Crossing the Causeway

Psychographics

SocialValues Overview



### Descriptions | Top 3 Strong Values



#### Attraction to Nature

How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life.



#### Financial Concern Regarding the Future

The feeling of insecurity about one's financial future, particularly in old age, and of being personally responsible in this area.



#### Technology Anxiety

People strong on this construct are intimidated and threatened by technological changes and express high concern regarding the ethical and moral dilemmas towards which science and technology is advancing.



### Descriptions | Top 3 Weak Values

#### Attraction For Crowds

Enjoyment of being in large crowds as a means of deindividuation and connection-seeking.

#### Sexism

Belief in traditional, male-dominated views on the division of gender roles – that men are naturally superior to women. These views carry into economic issues such as the belief that, when both partners are working, the husband should be the main bread-winner.

#### Enthusiasm for Technology

Favourable bias toward technology. Tendency to be fascinated with the possibilities offered by modern technology; to believe that technology is the best tool for facing today's world, one that helps us adapt and respond to the demands of daily life. People who are strong on this construct have great confidence that science and technology can better their lives.



# Research Highlights



Summer 2024 Visitor Experience Survey



2024 Cruise Ship Passenger Survey



CBI Music Industry Research Project



Envision Visitor Profiles (DCB)



Canadian Tourism Data Collective (DCB)

## Tool Details:

- Destination Canada
- Free and Paid Levels of Access
- Subscribed to by Destination Cape Breton
- Work in Progress
- Variety of Tools and Sources
- Uses AirDNA, STR Report, StatsCan, and Transaction Data
- Some Tools can be Focused on Cape Breton
- [www.tourismdatacollective.ca](http://www.tourismdatacollective.ca)



**DESTINATION  
CANADA**



# Research Highlights

## Lodging Aligned Spend Reporting (LASR) Cape Breton

### Spending Overview

Province: Nova Scotia - City: Cape Breton Island - 2023

Total Spending and YoY Growth

\$452.3M | ↗ 13.0%

International Spending and YoY Growth

\$159.7M | ↗ 14.7%

Domestic Spending and YoY Growth

\$292.6M | ↗ 12.1%

Total Spending 2019 Comparison

↗ 38.5%

International Spending, 2019 Comparison

↗ 35.9%

Domestic Spending, 2019 Comparison

↗ 39.9%

### Spending Category

Province: Nova Scotia - City: Cape Breton Island - from January to September 2024

Accommodation

\$116.7M | ↗ 8.1%

Food & Beverage

\$91.6M | ↘ -0.3%

Retail

\$28.8M | ↗ 20.3%

Transportation

\$42.4M | ↗ 14.1%

Recreation & Entertainm...

\$6.4M | ↘ -93.8%

Acc. 2019 Comparison

↗ 42.1%

F&B 2019 Comparison

↗ 61.6%

Retail 2019 Comparison

↗ 78.2%

Trans. 2019 Comparison

↗ 34.3%

R&E 2019 Comparison

↘ -92.0%



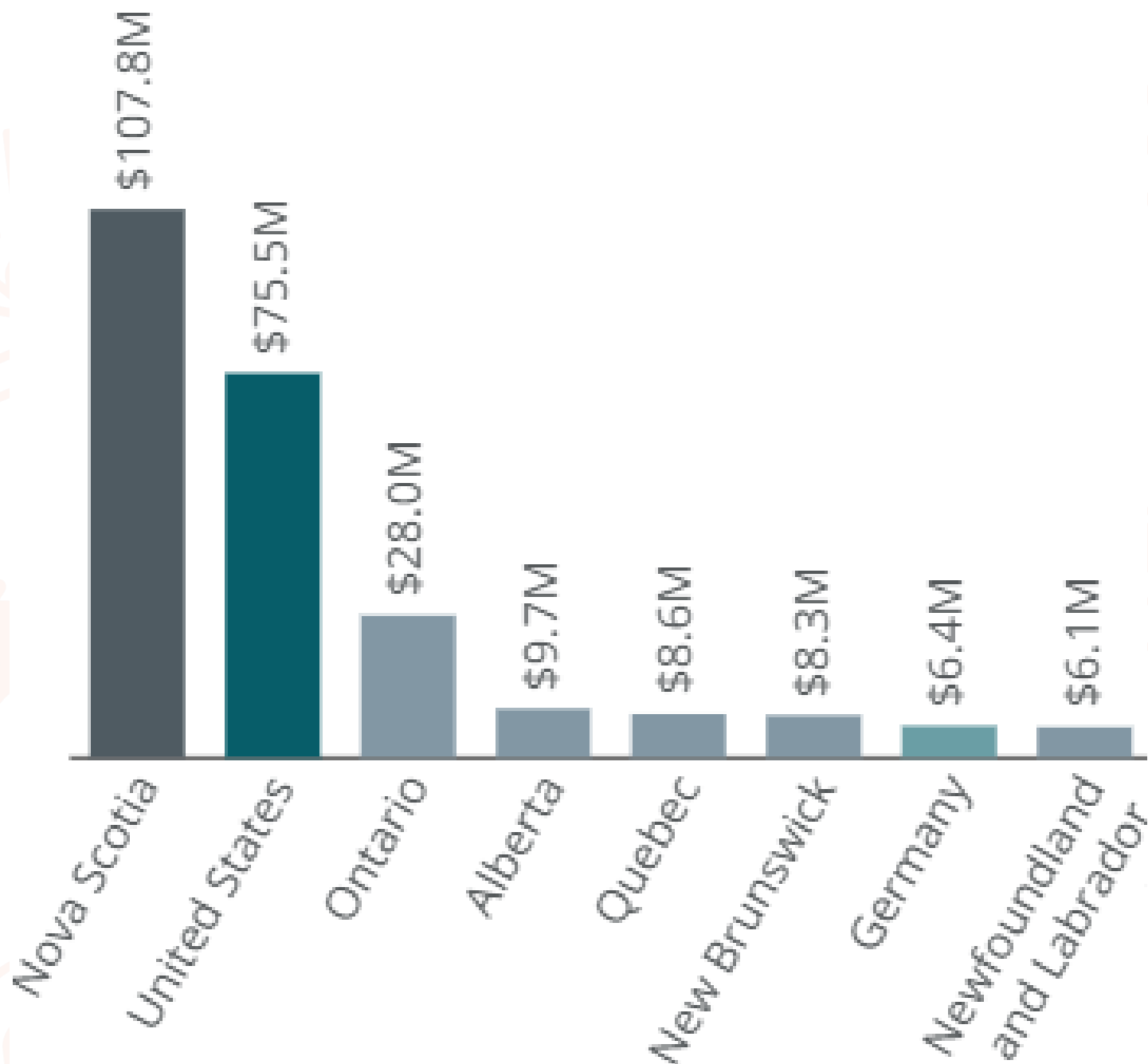


# Research Highlights

## Lodging Aligned Spend Reporting (LASR) Cape Breton



Spend by Origin Markets, Current Year ▼



Spend by Origin Markets in 2023 ▼





# CAPE BRETON DASHBOARDS

CBITTN has created 3 dashboards utilizing CBITTN research.

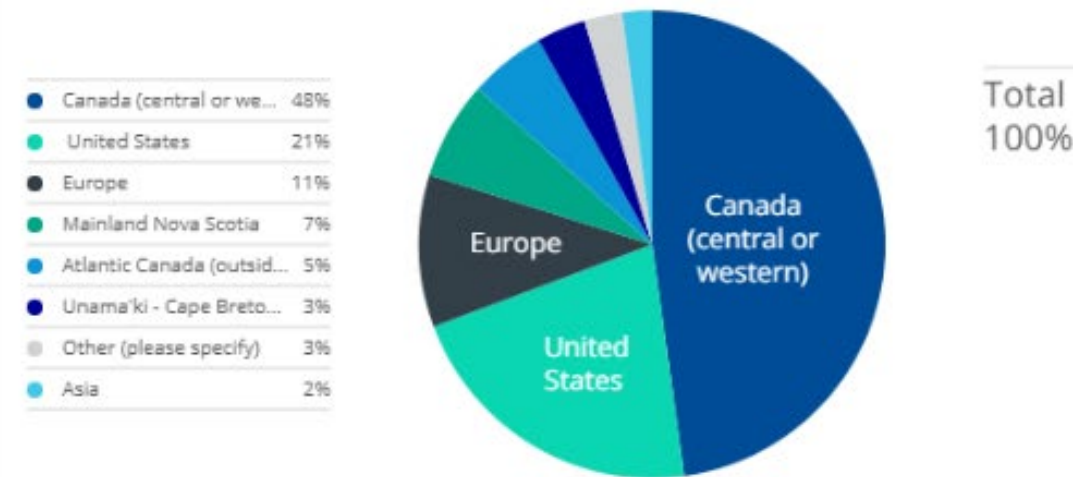
- 2023 Visitor Experience Dashboard
- 2023 Workforce Issues Dashboard
- 2024 Visitor Experience Dashboard

All 3 dashboards are accessible from the CBITTN website,

[www.cbtourismworks.ca](http://www.cbtourismworks.ca)

## 2024 Unama'ki - Cape Breton Island Visitor Experience Survey

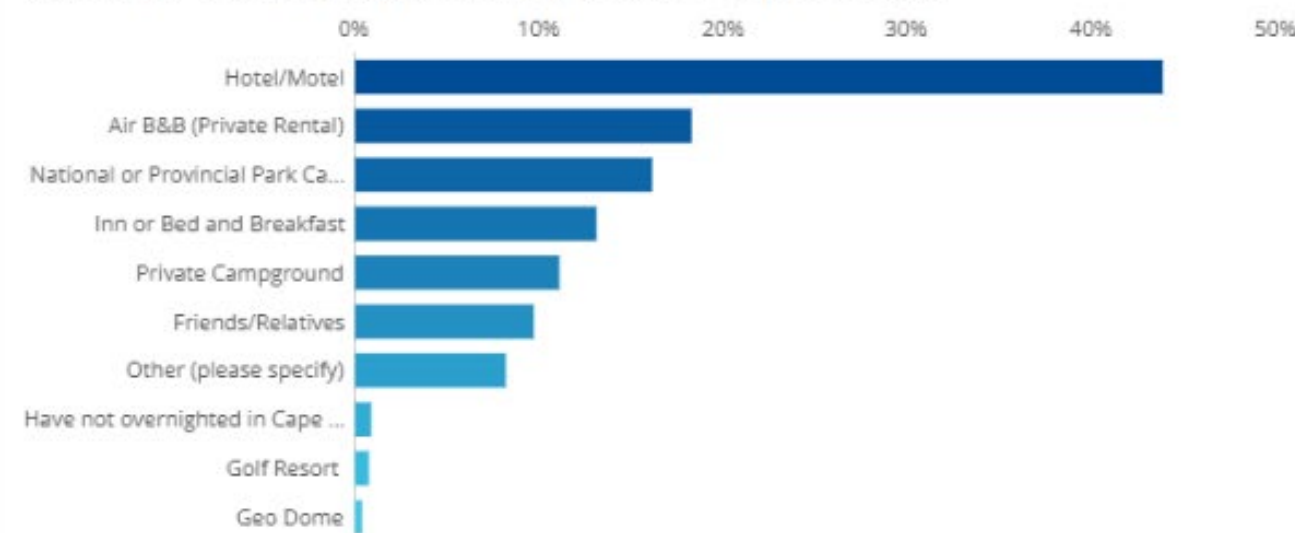
Where are our visitors coming from?



### Visitor Demographics

Survey responses are collected at popular tourism sites across Cape Breton Island as well as at Visitor Information Centers (VICs) in St. Peter's, Louisbourg, and Baddeck. Visitors from closer to Cape Breton may be more familiar with the island and less likely to visit VICs or popular tourism attractions. Of those surveyed, approximately 60% of visitors are from Canada.

Where do visitors stay when they come to Cape Breton?



What tools do visitors use to plan their Cape Breton trip?



Over 80% of visitors to Cape Breton Island research their trip through the internet. Over half of visitors use online maps to plan their Cape Breton trip. It is worth noting that these tools often require visitors to have cell reception to function properly while traveling.





**THANK YOU**

**[WWW.CBTTOURISMWORKS.CA](http://WWW.CBTTOURISMWORKS.CA)**