Cape Breton "Tourism Road Map" Destination Development Plan

Final Report

Prepared for:

Cape Breton Growth Fund Corporation
Corporation fonds d'investissement du Cap-Breton

By

ECONOMIC GROWTH SOLUTIONS INC.

In association with:

Market Access International Canada Inc.
Dan White and Associates Ltd.

March 2003

TABLE OF CONTENTS

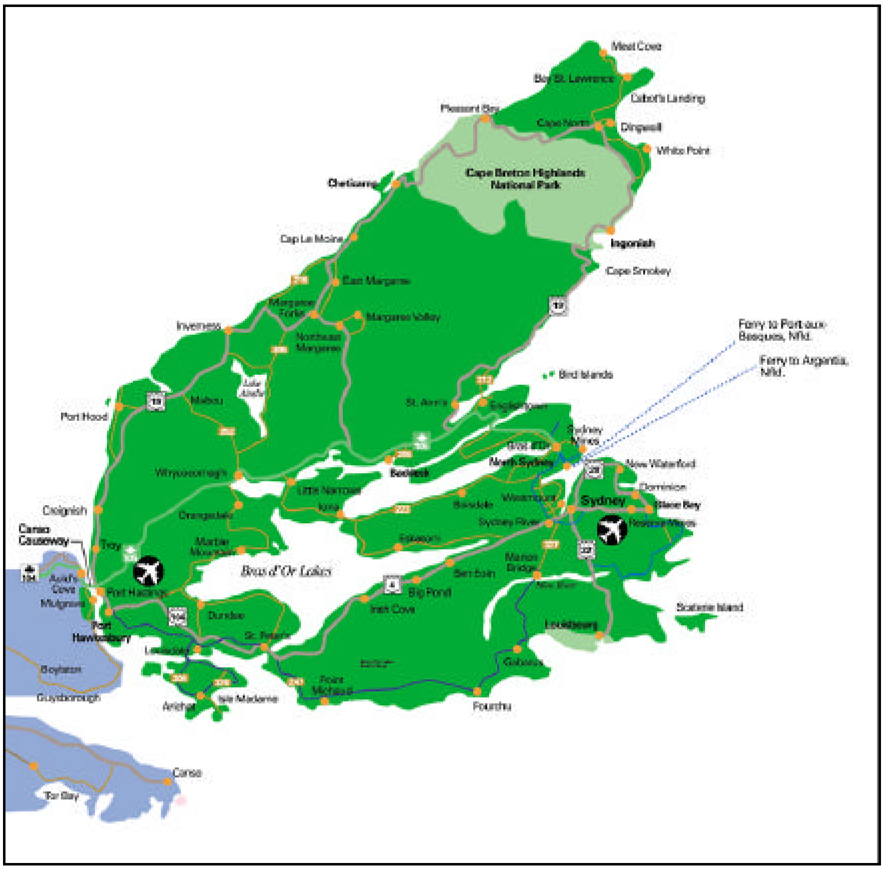
APPENDICES

EXECUTIVE SUMMARY

INTRODUCTION

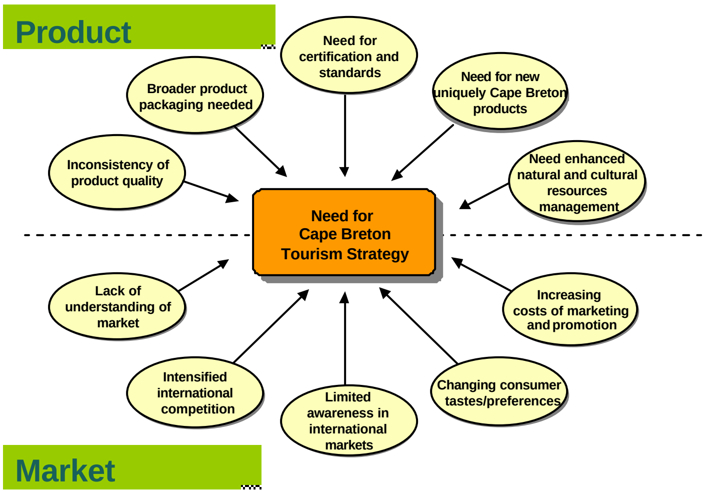
Cape Breton is a magical place – in fact many have defined it as unique in the world. *Conde Naste Traveller*, *National Geographic* magazine and others have acclaimed this wonderfully distinct island environment variously as the "world's most scenic island" and "my favourite landscape on planet Earth" *(Gilbert M. Grosvenor, National Geographic Society).*

Figure 1 – Map of Cape Breton Island



Yet Cape Breton stands at a crossroads in 2003, a moment in time when all the tourism successes of the past collide with an unknown future. The Island's transportation infrastructure has fallen behind required standards and lacks key elements; there are many more competitors than existed 50 years ago when the Island was a leader in shaping a modern tourism industry. The future is uncertain in a post 9/11 world that challenges most conventional assumptions about markets and long-term trends. Cape Breton faces a time of pronounced change in the Island's economy. Specific challenges facing the industry are shown below in Figure 2.

Figure 2: Challenges Facing Cape Breton's Tourism Industry



Re-energizing Cape Breton's Tourism Industry

Part of the process of forging a new imaginative framework for tourism growth has involved engaging key stakeholders across the Island in shaping the future. During the consultations of this study they engaged the process with vigour and imagination. In fire halls, community centres, church halls and other meeting places across the Island stakeholders advanced a fundamental call for collective action. Nine town hall sessions were hosted and, despite the demands of early summer, hundreds of people came out to discuss current issues and work in groups on ideas. Many more took the time to collect their thoughts and submit written reports complete with plans and detailed explanations about their ideas. With obvious enthusiasm, stakeholders issued a call for a collaborative approach in shaping a visionary plan of action for tourism.

In large measure, this *Cape Breton Tourism Road Map Destination Development Plan* is reflective of this attitude. The Road Map is a detailed destination development plan designed to help transform Cape Breton's tourism industry. It does so while stressing the need for collective action and emphasizing the invaluable contribution of partnership. The Road Map is not a simple collection of strategic infrastructure projects, and aggressive new approaches to marketing. It is about energizing stakeholders at the grass roots in the pursuit of a compelling, world-class 21st century tourism sector.

Not Just an Industry, Tourism is a Strategic Sector in Cape Breton

Cape Breton's tourism landscape has many participants, but lacks an overarching plan. Municipalities, First Nations, the provincial and federal governments all support the sector with funding and other programs *and* operate tourism related sites that are heavily involved in serving visitors on the front line. Cultural, heritage and nature based organizations work to create the products and businesses take the products to market and supply key services that make a stay memorable. Tourism is much more than an industry in Cape Breton – it involves more than 30 *types* of organizations! Literally thousands of volunteers are involved in activities that entertain and inform our visitors!

All these stakeholders are committed to the Island's future – the challenge is to harness the energy in the tourism sector to help the Island build momentum as an international destination. Through the Tourism Road Map, the tourism sector will help lead the call for a renewed sense of self in the broad Cape Breton community – pride in our history and our island character, confidence in the future, confidence to develop new products and share them with visitors from all over the world. There is a clear wish to work together for the benefit of our economy, our people, our visitors and our environment.

The "Road Map" is a Long Term Plan

At one level the Road Map is a challenge to all. Success will not come overnight and implementing the plan will not be easy. Big changes of direction require courage, teamwork, and tenacity. Change is required – nothing short of unprecedented cooperation will be essential for success. The Road Map will help build new, internationally acclaimed tourism products, and a framework for collaboration that secures the future.

THE CURRENT SITUATION

Current issues have helped shape the overall direction of the Road Map plan and the details of its implementation. Here are a few of note:

Overall Market Trends

The CTC reports that air travel declined in 2002 and road travel to and within Canada, increased. This will likely continue for the foreseeable future.

- The CTC Sees long haul air travel to Canada as weak until at least 2005.
- There are currently 1 million person trips per year to Cape Breton, the majority of which (over 70%) are visits of one or more nights.
- Almost half of non-resident overnight visitors to Cape Breton are from the U.S. – this is a higher percentage than the Nova Scotia overall average.
- Some specific states are emerging as good target markets such as Florida, Pennsylvania, and the New England states.
- E-commerce is becoming a major marketing tool for all destinations, including Cape Breton.
- Nature and culture products are on the rise in the minds of our target customers.
- US and Canadian visitors have quite different profiles – generally the US visitors are older and travel as couples, while Canadians are younger and travel as families.

Competition

Our competitors are getting more aggressive. PEI has doubled its marketing commitment, primarily aimed at Cape Breton's largest market – Atlantic Canada.

Organization

There is a need for a more fully integrated destination marketing effort for Cape Breton. Currently a number of organizations and groups are struggling to undertake their own marketing initiatives with limited resources. An appropriate organizational approach for implementing the “Road Map” is essential.

Transportation Infrastructure – The Need for Strategic Action by all Governments

Transportation is key to our success, particularly if road traffic is such a large part of the success we have planned. Much of Cape Breton's road infrastructure needs to be upgraded with new pavement, look-offs, interpretation enhancements and completion of key touring routes that are critical to a fundamental component of the Tourism Road Map – creating more tourism routes that spread visitors around the Island and keep them here longer.

- **The Cabot Trail is seen as an international icon**, ranked among the finest scenic drives in the world. The demand for what it offers will be even greater in the future as we see a clear and likely long term commitment to road travel from our key markets. Rejuvenation of the Cabot Trail will be a 50-year decision for Cape Breton. We must reinvest now.
- **We look to a renewed partnership among the three levels of government** to address these infrastructure needs that go beyond the short list of priority development opportunities in the Road Map – they provide the needed context in which these other opportunities can find life. The Tourism Road map project emphasizes the need for governments to address roads as a priority.
- **Enhancing air access is an ongoing issue.** There is potential to strengthen the national/international market draw by improving Cape Breton's direct air access – both scheduled and charter services. This should be pursued opportunistically with key airline, tour operator, airport authority, and government partners.

VISION, OVERALL GOAL AND KEY OBJECTIVES FOR CAPE BRETON TOURISM

To advance and realize its vision of the future, Cape Breton's tourism sector must embrace a process that helps define a common future among the many organizations in the sector. All three levels of government (federal, provincial and municipal), associations, large and small enterprises, and volunteer groups play roles in tourism in Cape Breton. The vision *must inspire partnerships and leverage the momentum of key partners* like the Nova Scotia Tourism Partnership Council, tourism businesses, municipalities, community organizations, the Cape Breton Growth Fund and others. The **"tourism economy"** engages numerous communities and thousands of volunteers throughout Cape Breton who make sharing our Island with visitors an important part of their lives.

Cape Breton's character and identity help shape the vision, which should incorporate the following elements:

- A need to put focus on nature, heritage, and culture.
- Recognizes the stalwart nature of Cape Bretoners – an Island people with a proud history.
- Culture – few other islands in the world have the opportunity to rise economically on the strength of music and culture.

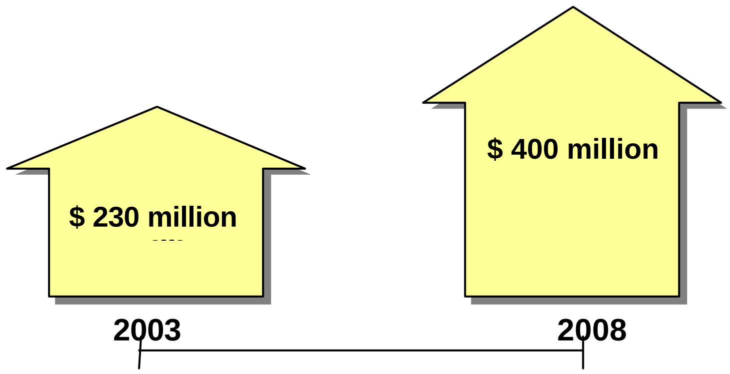
The tourism vision should also encourage the tourism sector to work closely with and leverage other emerging sectors in Cape Breton, such as IT and culture.

Vision for Cape Breton's Tourism Sector
*"We will build a **tourism economy** in Cape Breton that engages all stakeholders affected by tourism and distributes benefits throughout the Island. By enhancing/creating attractions and experience-based packages, and effective marketing channels, we will bring long-term revenue growth to the tourism sector in Cape Breton. By sharing our identity with visitors we build the pride and confidence that will power Cape Breton's economy into the 21st century."*

Overall Goal

The major challenge for the "Tourism Road Map" is to dramatically increase tourism revenues from $230 million to $400 million by 2008. The Tourism Partnership Council, Destination Halifax and other regions are driving toward revenue increases as a measure of success over the next 5-10 years. This alignment of goals will enable more coordinated focus and effort among many partners.

Figure 3: Goal of "Tourism Road Map" Project



Key Objectives

Three key objectives are designed to increase revenue from tourism, as described below:

Increase the number of visitors to Cape Breton. Develop programs that ***increase visitor counts*** including off-season, shoulder season and return visits from the regional market.

Increase the yield. Through improved market information, a stronger use of bookings data, pricing and packaging strategies, industry will be able to ***charge a higher price*** in keeping with value and market demand. Product enhancements will also result in increased yield.

Increase the amount of money each visitor spends by *purchasing more goods and services*. Packaging and cross selling with neighbouring businesses will increase the length of stay and total expenditures.

THE DESTINATION DEVELOPMENT PLAN - WHAT DOES IT INCLUDE?

The "Road Map" addresses four key requirements for expanding Cape Breton's tourism industry, as shown in Figure 4 below.

Figure 4: Four Requirements for Expanding Cape Breton Tourism

How is This Plan Different than Others? What are the Highlights?

The Tourism Road Map provides **one integrated plan** bringing strategic infrastructure and programming together with packaging initiatives and enhanced destination marketing.

- **The Goal.** For the first time Cape Breton has a revenue goal as the main focus of planning in the tourism sector, emphasizing the importance of tourism as an economic generator.
- **Made in Cape Breton Plan.** The Road Map was developed by Cape Bretoners for Cape Breton. The plan defines Cape Breton's own vision of the future in tourism for the next decade or more. The Province of Nova Scotia is a willing and important *equal partner* in this endeavor.
- **A new relationship with Nova Scotia.** Nova Scotia Tourism and Culture has been a big supporter of the Tourism Road Map process and is helping to redefine a relationship with Cape Breton – one based on mutual interest and common goals. A comprehensive range of partnership projects will be undertaken, including critical pilot projects in product development, packaging, operations of the new Welcome Center, marketing and e-commerce.

- **Goals integrated with key partners.** For the first time ever Cape Breton's, Nova Scotia's and Halifax's tourism strategies are aligned with a similar focus – the goal is revenue! This is extremely good for Cape Breton. There are a number of ways that Cape Breton can work both with Nova Scotia and with Halifax to increase tourism revenues. With common goals, more collaborative work can be done in areas of market research, information exchange, measurement and specific marketing campaigns.
- **Collaborative effort at a new level.** Getting all three levels of government, businesses and community groups to work together around one goal will be a first for Cape Breton and in many ways a first for Canada. There has never been a tourism development plan that contemplates this level of island-wide teamwork.
- **Aggressive sales orientation**. Many tourism strategies focus primarily on marketing, and most of that effort is put into advertising and promotion. The Road Map puts a new focus on selling. Although advertising is an important part of any development effort, our goal requires us to work on building a selling approach and selling teams – we must make the cash registers ring if we are to achieve our goal! This new emphasis on selling is part of the Nova Scotia vision for tourism. Cape Breton is leading the way by building a marketing system that will put emphasis on selling, direct to the consumer and into partner channels.
- **A Welcome Center that will sell and move visitors around the Island.** All levels of government support the new Welcome center concept recommended in this study. This is an exciting project that will provide the services visitors want and actively sell tourism products. Initial plans call for a location that will offer visitors a variety of routing options for travel around Cape Breton. Visitors to the center will be shown product options in culture and nature that will help spread them around the Island.
- **Seasonality issues drive all elements of the plan**. The vast majority of visitors to Cape Breton are from Nova Scotia and the Maritimes. Addressing seasonality will require that we make every part of the plan work towards increasing shoulder and off-season visitation and revenues from this target audience, along with specific out-of-province target markets. The development priorities, the programming changes, the packaging, the market focus, the structure of the destination marketing program, and the marketing plan all address seasonality issues.
- **Sustainability.** Cape Breton will seek to become a pre-eminent sustainable tourism and ecotourism destination, replicating the success of

market leaders in this segment such as New Zealand, Australia and Costa Rica.

- **The major development opportunities are world class.** Care has been taken to craft priority development opportunities that are market driven, strategic and have momentum. They will all inspire visitors and Cape Bretoners alike and be catalysts for more tourism activity.
- **E-commerce.** Cape Breton will seek to become the most bookable destination on earth. Many destinations put energy into marketing – few drive revenues with the web. The e-commerce outline found in the Road Map plan will lead the way for Nova Scotia in this area.
- **Strengthened market positioning.** As a result of the Road Map process, Cape Breton will step forward and make a first ever claim. Leveraging the CTC positioning for Canada and the provincial positioning of Nova Scotia, we will define Cape Breton's positioning as the best touring destination in Atlantic Canada. "Cape Breton Island is the ***premier touring destination on Canada's Atlantic Coast*** where visitors can connect with nature, cultural, and heritage experiences".
- **Attracting investors.** Cape Breton will offer investors a jurisdiction that has defined tourism development plans and open minds about new investors and operators playing a part in the future. With a vision that reaches into the decades ahead, off-island investors will see a home for their personal vision. Already some of these people are expressing an interest. Government programs are working now to encourage this interest. The Road Map will provide a canvas on which investors can see their future.

Three Overall Strategic Thrusts

The "Road Map" has three overall strategic thrusts:

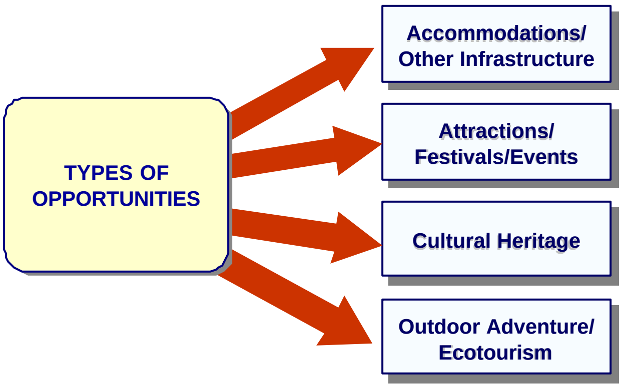
1. **Enhance and develop strategic infrastructure –** developing strategic opportunities that lead to spatial development based on gateway, hub and spoke, touring route "infrastructure".
2. **Integrated effort of sector partners –** creating a partnership framework that allows many organizations and groups from the public, private and volunteer areas to work on common interests.
3. **Aggressive packaging, sales and marketing.** Creating packaged products that will move visitors around the Island and extend their stay

and marketing programs that take this product to market and sell, not just promote.

ENHANCING AND DEVELOPING STRATEGIC INFRASTRUCTURE

Enhancing and developing strategic infrastructure will involve new physical and programming infrastructure. Several categories of opportunities were identified, as shown in Figure 5.

Figure 5: Categories of Opportunities



The study identifies and recommends well over 100 strategic tourism development opportunities that should be pursued by stakeholders over the next five to ten years. All of these opportunities were subjected to a product-market match analysis and the application of additional criteria, in order to identify the highest priority development projects for the short term.

Priority Development Projects are World Class

All of the priority development opportunities identified in the Road Map process have been assessed on their potential to help the tourism sector *strategically* – they had to contribute to the overall development of the Cape Breton tourism sector. In addition to scoring strongly against several product-market match criteria, a number of additional prioritization criteria were considered:

1. Extent to which a key market opportunity or product gap is addressed.
2. Potential for Island-wide impacts.
3. Ability to fulfil one or more specific development roles – act as gateway, hub of activity, or touring route – all of which stimulate Island wide travel.
4. Strength of tie-in with culture and/or nature product positioning.
5. Contribution to geographic distribution of tourism benefits throughout Cape Breton.
6. Ability to address seasonality.
7. Potential to attract high yield markets.
8. Extent of momentum and clear proponents in place or in view.
9. Anticipated direct impact on the overall revenue goal.

The priority development opportunities are intended to be key catalyst projects, designed to stimulate other related tourism development initiatives and make significant contributions to Cape Breton's tourism industry Island-wide. Some of the opportunities cover broad geographic areas within Cape Breton and consist of a number of components, while others are more location-specific but with broad-based impacts because of their potential to enhance Cape Breton's marketplace profile and draw visitors to the Island. These opportunities are grouped by principal category (some clearly fall under more than one category) and are summarized in the following paragraphs.

Accommodations/Other Infrastructure

Fundamental infrastructure enhancement and development is a core component of the overall destination development plan. Seven key infrastructure projects have been identified as priority development opportunities and discussed in the following paragraphs (listed in Alphabetical order).

- **Cabot Trail World Class Scenic Drive.** The Cabot Trail is the single biggest natural icon in the Cape Breton tourism inventory. Recent market data shows that road traffic is up in Canada and this is likely to be a permanent market shift, as the access and safety of air travel is in question. The vast majority of Cape Breton's current and future customers will come by road. Grand touring will remain the biggest single draw for visitors in the decades ahead. The Trail must be rejuvenated and enhanced in order to regain its role of senior natural attraction. We must improve and protect the trail and market it ever more aggressively. Visitors attracted by the trail can be encouraged to explore other less traveled areas of the Island.

- **"Ciad Mille Failte" Welcome Center at the Causeway.** A critical piece of marketing infrastructure, it will single handedly drive tourism revenues up in Cape Breton. One of the first of its type in Canada – a center that markets and sells Cape Breton tourism experiences and other products and drives tourism sector revenue for the whole Island. Offering all the services visitors want (gas, food, entertainment, tourism products, arts and crafts, etc.) in one location, it will have a near term target of 1 million visitors. It will be a showcase with the latest in presentation materials and AV technologies. An I-MAX quality film will give an "adrenaline rush" to visitors at the Welcome Center. Highly trained sales reps will become famous for their service, make recommendations and sell large volumes of Cape Breton touring product. Atlantic Canada visitors will return many times to buy services, tourism product and Cape Breton arts and crafts. The Welcome Center will become an attraction in its own right.
- **"Conventions Cape Breton" Trade and Exposition Centre.** We require better facilities if we intend to become a serious player in the meetings market over the years to come. By expanding to serve the 600-person group with modern meeting facilities we will address the majority of the meetings market in Canada. The convention and events market is almost entirely shoulder and winter activity. Cape Breton's strong track record in the events sector, especially sporting events, means that a coordinated effort with upgraded facilities will make significant impact in extending the season. All of the priority opportunities outlined in the Road Map will help draw meetings and events, while meetings and events will supply all of the other opportunities with customers in shoulder periods.
- **"e-CB" Tourism e-Commerce Development.** Cape Breton can be the most bookable on line destination in the world. The current opportunity to work with the IT sector strategy, and the existence of key partners who have an interest in the project, make it timely. Many of our target customers are using the web now (Americans are three times as likely to book vacations on the web as Canadians). If done right we have the opportunity to "step over" our competitors. It will require extensive and imaginative partnership but the time is right. This project is very consistent with the Nova Scotia e-marketing strategy – in fact it contemplates going further and faster than our Nova Scotia partners.
- **Fleur-de-lis Trail "Route Ancienne".** The Fleur de Lis Trail will become the road route that helps expand the Acadian Experience in Cape Breton.

It will provide momentum for the creation of more Acadian product and the addition of key infrastructure. Completion of the Trail is an integral part of the infrastructure "system" needed to step up to new market opportunities and the long-term revenue goal. The incremental goal of $170 million a year is the business case for the trail. It is a good business decision for Cape Breton and for its communities. The product and market analysis in this study indicates that visitors from our major markets over the next few decades will stay longer, and spend more, with this key piece of infrastructure completing the eastern loop. New community based tourism products will flourish as a result.

- **"Inverness Links" Resort and Golf Club.** The Inverness project can define a future for Inverness County and Cape Breton that could rank it with the Monterey Peninsula in California. The area is no less beautiful and the course as planned will become famous all over North America. The stunning scenery, natural setting, and access to nature trails and various outdoor adventure/ecotourism activities locally, round it out as a project that will position the west coast for the next 50 years (in the same way that Keltic Lodge did for the Cabot Trail, in the 1950s). The project will become a magnet for nature product development, high end residential development, and will "pull" the grand touring and nature visitor up the Ceildh Trail.
- **"Sydney-by-the-Sea" Waterfront and Downtown Heritage.** This project will help present a new, vibrant image of Sydney to visitors from around the world. Other cities (Duluth has had great success) have moved from an industrial past to a vibrant new future using the theming of a waterfront district to help build a new economy. Sydney has the assets and can give birth to this idea through integration of efforts already underway. With the creation of the Mi'kmaq Cultural Heritage Centre and Museum on the water, Sydney, like its Australian namesake, will have dramatic new cultural architecture that will help brand Cape Breton as a vibrant 21st century destination.

Attractions/Festivals and Events

While some of the preceding infrastructure initiatives will clearly result in the creation of new attractions directly or indirectly, there are four additional attraction developments that merit inclusion on the priority development opportunities list (in alphabetical order):

- **Festival Cape Breton.** This new Island-wide, umbrella flagship festival incorporates existing festivals, builds on the proud history of the Island, our sense of place " we are an island, a rock in the sea", and of our age-old links to visitors from across the sea. Eventually a year long festival, it will grow over the coming decades to offer cultural programming at all times of the year. It will draw visitors to every corner of the Island and empower our cultural efforts. It will drive significant off-season business, support all of our target markets, and in time will grow to become a star attraction. It will be central to our determination to showcase our unique cultures, and it will become famous the world over. Festival Cape Breton will develop a signature production, shown on the mainstage in high season. It will rise on world stages in the off-season, stimulating tourism, the music and culture sectors. Like Cirque de Soleil, the Bolshoy, or the Royal Winnipeg Ballet, it will make our Island famous as a cultural treasure.

- **“Men of the Deeps” Miners’ Museum and Colliery Heritage District.** The Miners Museum has been a major attraction for Cape Breton and is a strong part of the industrial heritage product. With its new business plan and the integration of an innovative heritage district component, it elevates to the level of major potential hub, a hub that has the potential to support major tourism routes that encompass all parts of CBRM Its enhanced role will provide traffic flow for other smaller yet worthy projects in the area and support Colliery and Marconi Trail activity. Its link to Louisbourg will be key and help to close an exciting touring loop. The completion of the Fleur De Lis Trail will bring dramatic new volumes of traffic to the area.
- **"Seasons at the Fortress" – season extension at Fortress Louisbourg.** Extending the season at the Fortress is seen as a major opportunity for capturing and keeping our target customers in the fall season. When integrated into a plan that includes the community of Louisbourg and the adjacent communities it builds into a powerful story for season extension. Visitors who come to Cape Breton to experience activities at the Fortress will also experience Cape Breton broadly. This fits well with series of other activities and developments that will collectively build the shoulder season over the decades ahead.
- **“Wings” Hall of Flight Attraction Development.** An exciting addition to the world famous Bell Museum, the Hall of flight would pull new visitors to the Island, stimulate a new flight festival, and do double duty by providing a Baddeck-based stage for Parks Canada programming, Festival Cape Breton productions, and other community based day time and evening events.

Cultural Heritage

Capitalizing upon Cape Breton's strong cultural heritage themes – particularly the Acadian, Aboriginal and Celtic cultures – is a key focus of the Road Map and a distinctive cultural experience product is recommended in each case as a priority opportunity (listed alphabetically).

- **"Connexion Acadien" Cultural Experience.** The Acadian Experience will begin at the Welcome Center at the Causeway, where visitors may choose to begin their tour on the eastern shore. A joint Fleur De Lis Trail and Acadian Experience orientation centre located in Richmond County will introduce the whole Acadian experience on the Island. Packaged product and information on a variety of Acadian experience opportunities will be promoted. Heritage, cultural, and cuisine packages will be available and genealogical source information will be on hand. Learning vacations will be the focus of the shoulder season programming. Visitors will be briefed on Acadian activities and encouraged to visit as many of the Acadian sites as possible on the Island.
- **Mi'kmaq "Time Travel" Aboriginal Cultural Experience.** Much work has been done in recent years as the Mi'kmaq community working to bring new tourism product to market. A number of exciting and strategic infrastructure projects will help create an overall inventory of Mi'kmaq product and spread visitors around Cape Breton. Experiencing the Mi'kmaq culture will be done through a rich and integrated series of packages, experiences, heritage sites and touring opportunities. Collectively they will form the Mi'kmaq Experience in Cape Breton, sharing 10,000 years of proud human history with visitors.
- **"The Celtic Celebration" Cultural Experience.** Like the other cultural experiences the Celtic Experience will encourage visitors to roam around the island and connect with a variety of Celtic elements - cultural, heritage sites and genealogy, in the order they chose. A genealogy exhibit at Iona will give a comprehensive introduction to Celtic culture and encourage visitors to trace their Celtic roots. The intent of the Celtic Experience will be to encourage collaboration among Celtic communities and groups, so that they create product/packages that will draw visitors to many parts of the Island and to co-ordinate marketing under the Celtic " brand ". At Iona visitors will be briefed on Celtic activities and encouraged to visit as many Celtic sites as possible.

Outdoor Adventure/Ecotourism

The study recommends many opportunities in this category including the following four value-added priority catalyst outdoor adventure/ecotourism development opportunities (listed alphabetically) each of which has significant spin-off in terms of potential employment and related support services such as guided tours and excursions, as well as the ability to extend the season.

- **Atlantic Canada Nature Centre and Wildlife Sanctuary.** Located at the Two Rivers Wildlife Park this centre would introduce the passionate nature lover to the whole array of wildlife in Cape Breton. It would be a launch pad for an extensive connection to the natural environment and wildlife of the Island. Encouraging shoulder and even winter season travel, the centre would prepare the visitor for an expedition to Cape Breton ecolodge(s), wilderness trekking, or act as a first rate scientific experience for the grand touring visitor. It would build a long term clientele in the Atlantic Canada family market, be another venue for Festival Cape Breton productions and convention receptions, and provide a major reason for travelling along Route 4 and the Fleur De Lis Trail.
- **"Passage East" Cape Breton Eco-Cruise** will help put Cape Breton on a world map. No less appealing than the Galapagos, the Cape Breton Bras d'or Lakes and ocean cruise itineraries will appeal to the international and the local market alike, with accessible high-end experiences that can be enjoyed in safety. Partners have an interest, communities and groups are keen to get moving – the market is there. Additional cruise itineraries will build on the huge success of Cape Breton in the international cruise market, giving cruisers a reason to return, and support many of our target markets with shoulder season product. Above all, the Cape Breton cruise itineraries will position Cape Breton as an international destination and encourage partnerships with organizations like National Geographic and the Smithsonian Institute.
- **"Safari Cape Breton" Eco-Adventure Lodge(s).** Eco-lodges are becoming famous the world over – they position a destination in the minds of target customer groups as well as earn revenue and drive tourism receipts in the area. The ecolodge concept outlined here is aimed at the world traveller. Like Treetops in East Africa and Australia's Daintree Lodge, it will draw clientele for an experience of nature that is unique. These lodges will help define an extraordinary niche for natural experiences in eastern North America. The wilderness areas they are targeted for have all the drama and natural wildlife necessary to create a world class, natural heritage experience.

- **"Trails for All Seasons" Development Plan.** It could be argued that much of our potential in the outdoor/nature market, and particularly the shoulder and winter outdoor/nature market, depends on having a comprehensive trails strategy which will state how we will define and care for trails over the coming decades. In the near term significant investment will be made in this opportunity through research, which will identify our trails inventory, and the requirements for the future to ensure Cape Breton has the various trail systems it needs. This development plan needs to highlight the value-added tourism development opportunities that a good trails infrastructure provides, such as guided outdoor adventure and ecotourism tours and excursions of all types, and the types of facilities and services that will support these opportunities and complement the trails infrastructure.

IMPLEMENTATION - INTEGRATED EFFORT OF SECTOR PARTNERS

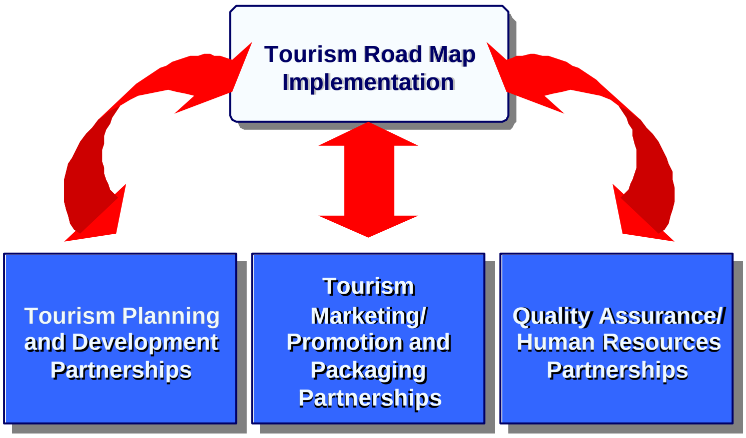
How will we organize the implementation of the Cape Breton Tourism Road Map?

Collaboration is Essential

The Road Map process has shown that more than 30 *types* of organizations are active in the tourism sector in Cape Breton. The key requirement is to forge an environment in which collaboration, cooperation and collective action prevail. Energy, talent, resources and determination must be harnessed to drive a new agenda and shape a modern, progressive and successful tourism industry.

Collaboration and a belief in a common goal are critical to success. As one Task Force member has put it, we need " trust and understanding " in order to move forward together. Collaborative effort – teamwork – is the only way to achieve the goal and the vision of the Tourism Road Map. Three broad categories of partnerships will be required, as shown in Figure 6.

Figure 6: Implementation Requires Partnerships



Implementation of the Road Map Will Revolve Around Three Tracks

A number of concurrent activities are essential to move the Road Map forward. Some of these will move quickly, others will take time, and still others will never stop. Implementation will involve the following three tracks:

1. The partner proponents in infrastructure projects implement appropriate strategic projects as soon as they can.
2. A Cape Breton Tourism Partnership from the three levels of government operating in the sector, along with industry and communities, will be organized to build the collaboration model that will leverage the efforts of all to achieve the revenue goal.
3. The new Cape Breton Tourism Partnership will identify funding sources to fund a permanent destination marketing program, which will undertake ongoing product development and marketing activities. The management staff role will evolve to become the professional management group for the destination marketing program.

AGGRESSIVE PACKAGING, SALES AND MARKETING

The Marketing Plan component of the Road Map outlines in detail the activities planned for product development (primarily packaging and human resources development) and marketing.

Markets

There are four fundamental markets to be addressed as we focus our packaging and marketing activity in the future. They align well with the provincial and national approaches and with the product and market analysis done in the Road Map study. They are:

- Grand Touring
- Culture and Heritage
- Outdoor and Nature
- Convention, Meetings and Events.

A New Destination Marketing Program

A new destination marketing program will implement the recommended product development (packaging primarily) and marketing initiatives and be aggressive, focused and professional. **It will facilitate the creation of packaged products** that will move visitors around the Island. It will do this work in concert with its partners Island-wide, and at the community level with municipal partners.

Creating core and partnership marketing programs will be the second major area of focus. The Tourism Task Force will lead the way in initiating development of this professional marketing program. A public/private tourism marketing partnership is required to move ahead in a market where many of Cape Breton's direct competitors have increased marketing investments.

In the near term, a clear focus on opportunity markets will make the marketing investment pay-off. It is important to note that developing new product and packages, or even getting better organized, will not alone bring the kind of revenue increases required by the Task Force. Best practices in North America show that consistent marketing investment is a fundamental part of the effort.

Much of the marketing activity (beyond core destination marketing activity) will revolve around partnership projects that are undertaken with program funds and matching partner dollars. This is the de facto partnership model that exists in Canada today and ensures that the organizations investing the money are making many of the key decisions.

Product Development/Packaging

Packaging may seem a minor term, but it is critical to our success. It is nothing short of the bridge between our new/enhanced infrastructure and the marketplace. Anyone who understands the success of a huge tourism destination like Orlando knows the key role packaging plays. Packages are the core "product" that visitors will buy in the future. Learning how to package will be one of the most important collaborative activities of the next few years.

HOW CAN INDIVIDUAL ORGANIZATIONS GET INVOLVED?

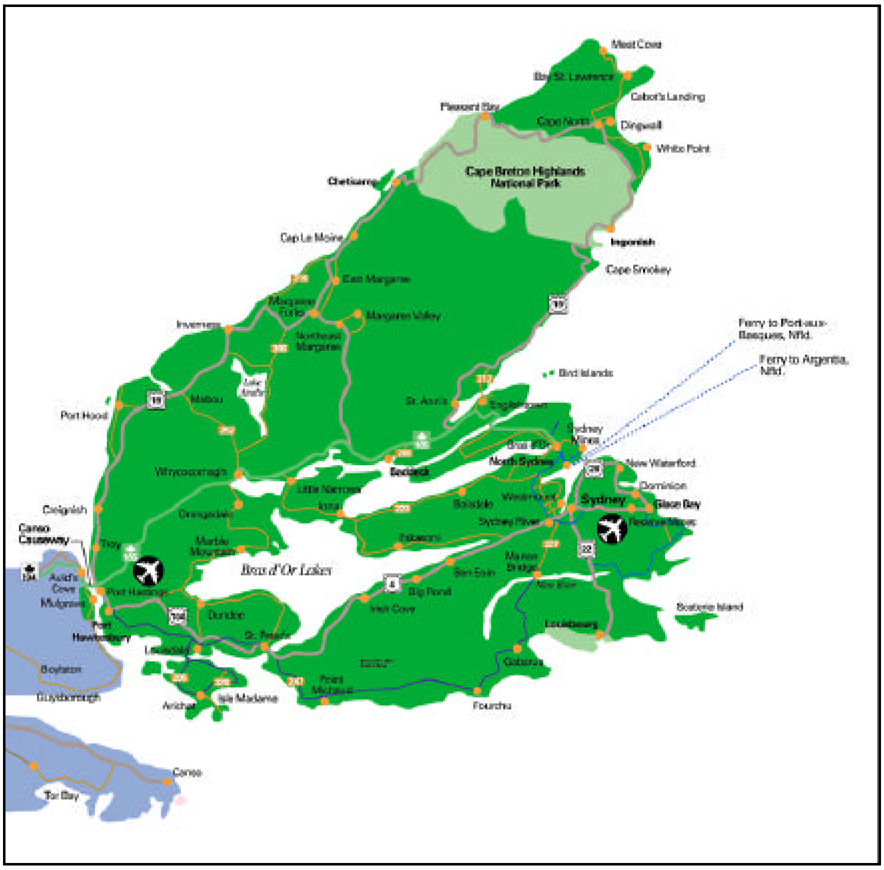
There are many ways to embrace the Tourism Road Map including the following:

- ♦ Commitment to working together with others to reach the revenue goal.
- ♦ Refining your own market and operational planning to support and leverage the Road Map's vision, overall goal and key objectives.
- ♦ Working with your municipality at the community level.
- ♦ Supporting the Task Force as it seeks to create the destination marketing program.
- ♦ Encouraging development projects in your community – taking a proactive role by encouraging entrepreneurs to develop some of the opportunities listed in the Road Map destination development plan.
- ♦ Investing in destination marketing programs once developed.
- ♦ Making collaboration your motto at the community and Island level.

1 – INTRODUCTION

Cape Breton Island encompasses a significant proportion of the land area of Nova Scotia and has a substantial existing tourism and transportation infrastructure (see map in Figure 1.1). Some of its flagship tourism attractions, such as the Cabot Trail and Fortress Louisbourg, are internationally significant. However, Cape Breton still represents a relatively "undiscovered" tourism frontier in the overall global context, with many unique topographic, biophysical, cultural and archaeological attributes of international significance. The Island's rich and diverse culture combines with a range of local flora and fauna, and spectacular natural scenery to produce an ideal environment for cultural and outdoor-based tourism product development.

Figure 1.1 – Map of Cape Breton



ECONOMIC GROWTH SOLUTIONS INC.

STUDY OBJECTIVES

The Cape Breton "Tourism Road Map" study was initiated to prepare an overall strategic plan for developing the Island's tourism industry which will help to grow tourism revenues from $230 million annually in 2001 to $400 million annually by 2008. The key objectives were:

- To understand competitive strengths, weaknesses, opportunities and threats relative to Cape Breton's tourism industry
- To ensure effective industry input via an open and consultative process
- To develop a good understanding of the market
- To identify the key opportunities and how to pursue them
- To prepare practical and realistic strategies/actions to achieve resource-based tourism diversification
- To prepare an overall Business Plan for implementation.

KEY ISSUES ADDRESSED BY STUDY

Tourism is a vital and significant part of the new economy taking root in Cape Breton. A go-forward plan, that enjoys the support and commands the confidence of key stakeholders, is needed now to move the industry in directions appropriate to the attraction of more visitors, and generation of increased expenditures. Recognizing what has already been achieved by Cape Breton's tourism Industry in terms of growth and development, several key issues have been addressed in preparation of this "Tourism Road Map" destination area development plan:

1. **Determining the strengths, weaknesses, opportunities and threats.** In this study a significant effort has been made to identify strengths, weaknesses, opportunities and threats relative to Cape Breton's tourism industry:
    - **Analyze strengths** in terms of how they can strategically provide competitive advantages for Cape Breton's tourism sector and suggest how strategic actions could protect or capitalize upon these advantages.
    - **Assess weaknesses** in terms of how they create competitive disadvantages and suggest strategic actions to strengthen areas of weakness, or reposition the perception of these weaknesses.

- **Identify opportunities** that could create competitive advantages, and recommend strategic actions to exploit these opportunities, while adhering to the region's cultural traditions and values (including Acadian, Gaelic and Aboriginal) and ensuring environmental sustainability.
- **Define threats** that would reduce competitive advantages and assess the risk associated with these threats. Contingency planning that deals with serious threats should be incorporated into Cape Breton's "Tourism Road Map".

2. **Assessing the internationally competitive existing tourism product base in Cape Breton and the realistic incremental market potential.** A comprehensive supply and demand analysis must be undertaken prior to developing the overall strategic destination area development plan. It is important that the supply analysis be based on extensive first-hand familiarity with the tourism product base in Cape Breton, and analysis of appropriate information and data.
3. **Overall vision, goals and objectives for Cape Breton's tourism industry and strategies required to fulfil them.** Some type of shared vision for this sector must evolve from this project, along with strong community and industry ownership of the process and recommendations emanating from it. Specific goals and objectives need to be defined and then strategies developed which will achieve the vision and objectives. This needs to be based on thorough and up-to-date research and analysis, along with extensive tourist operators and community consultation by key members of the consulting team. Cape Breton will be much better positioned to realize its objectives for tourism growth when it adopts a plan that better integrates the Island's products, marketing, and new investment with the provincial, regional and national tourism industry.
4. **Effectively incorporating stakeholder input into the tourism development process.** An extensive tourism industry and community consultation process has been built into the study process. This is to provide an opportunity to further inform industry stakeholders about broader tourism trends and important development and operational principles. The consultations also help to build ownership of the results and recommendations of the study which will facilitate implementation. As well, it ensures that the consulting team is able to effectively combine its broad national and international knowledge base and expertise with up to date local context, ideas and insights, to ensure that strategies and recommendations are realistic. The task of developing a "Road Map" for Cape Breton tourism needs the support of key stakeholders, building links between agents of change, and setting down a framework conducive to

new synergies, empowering the private sector as the central agent of change and new investment.

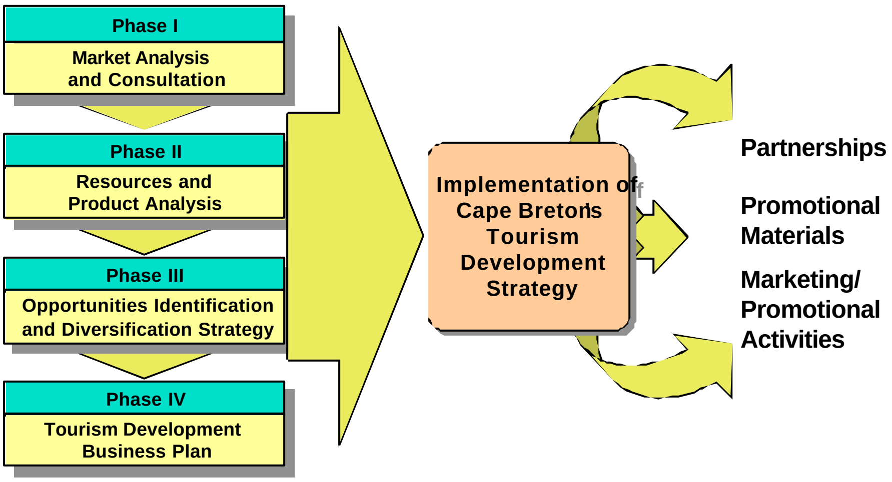
5. **Matching product opportunities to marketplace requirements.** The study needs to ensure a strong product-market match. We need to identify what existing natural resources offer strong adventure/ecotourism development potential and what cultural and heritage resources can be further developed to enhance tourism in the region, all in the context of meeting marketplace needs. The consulting team was structured to bring to the planning process a strong understanding of national and international tourism industry development, an intimate appreciation of the dynamic and direction of the regional industry, and an understanding of the unique issues confronting Cape Breton tourism, as well as the needs and expectations of key stakeholders.
6. **Identifying the most effective approaches for addressing the industry's product delivery needs.** This may involve incremental development and implementation of quality assurance standards, training and accreditation programs that can easily be accessed by Cape Breton's tourism enterprises and their employees.
7. **Effectively balancing the interests of various user groups (public and commercial) in Cape Breton's ecologically sensitive areas (including parks).** It is important that Cape Breton's tourism businesses can be retained (in terms of ownership) within the communities where they develop, although linkages to outside businesses (in packages, for example) are also essential. Authenticity of Aboriginal and non-Aboriginal cultural tourism products must be encouraged, to provide quality visitor experiences and help preserve their cultural traditions and heritage. We must develop a strategy for Cape Breton's tourism growth that recognizes the different resource assets, growth imperatives and product development opportunities of different parts of the Island.
8. **Examining how new opportunities could be developed, operated, managed and implemented.** When examining key strategic tourism development investment opportunities we must anticipate how they would be developed and operationalized, as well as what are the best approaches to financing and funding each of them. An understanding of the ongoing operational viability of any proposed developments is essential.

These and other issues which arose during the study have been addressed in this Final Report document.

Four-Phase Study Process

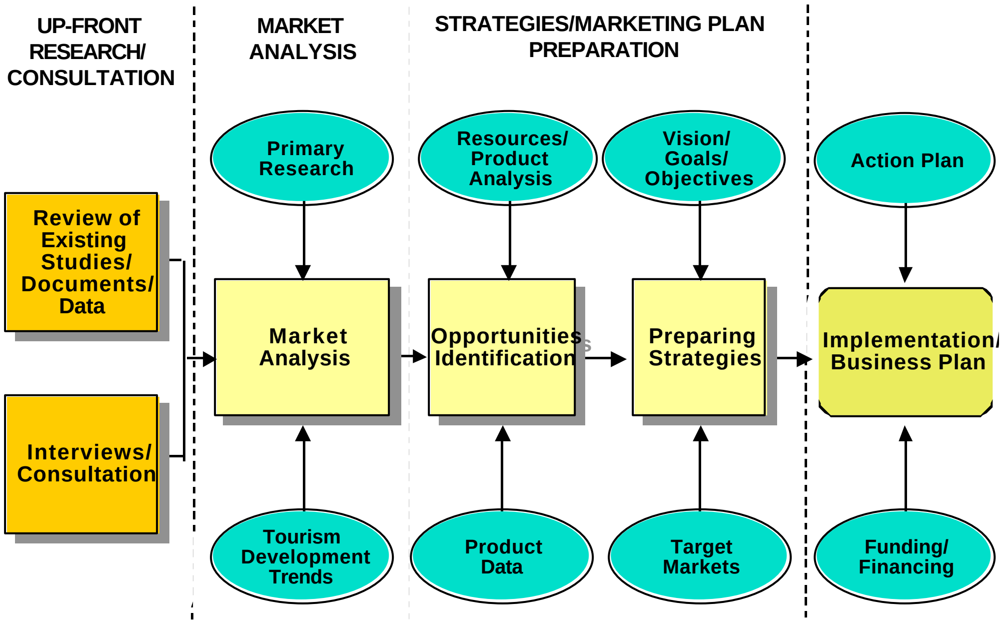
The four-phase study work plan was undertaken during the summer and fall of 2002 (See Figure 1.2). Phase I involved extensive market research and analysis, as well as a comprehensive industry and public consultation process, while Phase II focussed on resources and product assessment. Phase III emphasized opportunities identification and strategies. Phase IV tasks were focused on preparing an overall business implementation plan.

Figure 1.2: Four-Phase Work Plan



The Study process flow chart in Figure 1.3 shows the various study tasks focusing on the research/consultation, market analysis and preparation of the strategies, marketing plan, and implementation/business plan.

Figure 1.3: Study Methodology Flow Chart



As part of the Phase I process, we also undertook field reconnaissance and reviews of promotional materials to achieve the following objectives:

- To assess quality of tourism infrastructure on Cape Breton relative to national and international standards for:
  - Highways and key touring routes
  - Signage
  - Tourist information services
  - Lookouts and interpretive features.
- To understand changes and additions to the accommodations plant, as well as product quality levels relative to current marketplace expectations.
- To determine the character of new attractions development which has occurred in recent years.
- To assess the quality of restaurants and food service facilities of various types.
- To assess the types and quality of marketing and promotional materials used by individual tourist operators.

2 – Tourism Infrastructure and Product Base

Cape Breton's tourism product base has been examined in the following categories, with an inventory included in the Appendices:

- Transportation
- Accommodations
- Attractions - heritage and culture
- Outdoor Adventure
  - Guided adventure
  - Outfitters
  - Whale-watching and boat charters
  - Fishing
  - Winter
- Golf
- Festivals and events
- Parks
- Visitor information centres

Transportation Infrastructure and Services

Cape Breton visitors and residents utilize a number of passenger transportation systems that include air, highways, ferries and rail.

Air and Ferry Access

Air access to Cape Breton is limited, primarily because all flights from continental North America are routed through Halifax. Airports are located at: Sydney, Port Hawkesbury and Margaree, but only Sydney has daily scheduled services.

- **Ferry service**: Cape Breton has two internal ferries as well as an external ferry service to the Province of Newfoundland. There are two cable ferries, one located at Little Narrows in St. Patrick's Channel and the other at Englishtown in St. Ann's Harbour. Both these ferries are an important component of the Island's transportation infrastructure and are used extensively by residents and visitors alike. Recent imposition of a

$5 user tariff for cars has been of major concern to local residents and tends to reduce tourism use of these routes.

Marine Atlantic operates a year-round vehicle and passenger ferry service between North Sydney and Port aux Basques, Newfoundland. It also operates an additional ferry between North Sydney and Argentia in eastern Newfoundland, from mid-June to mid-September. This makes North Sydney a major transit and gateway point to/from Cape Breton.

Existing Road Infrastructure in Need of Significant Upgrading

Road access throughout the Island is generally adequate in terms of route structure, but the actual roads need significant upgrading in many areas where they are in poor repair, including the Cabot Trail. The ability to travel on circle touring routes is very appealing for motorcoaches and independent travellers alike; however, some of the key loops (such as on the Fleur de Lis Trail) have not been completed.

The variable standard of roads on the Island is currently a major negative factor for tour operators that visit Cape Breton. Roads quality can have a major impact on tour company itinerary planning decisions (positively or negatively).

Some of the limited road-based public transportation services available on Cape Breton include the following:

Figure 2.1: Public Transportation Services on Cape Breton

Transportation Service	Destinations
Transit Cape Breton	Sydney and Metro CB
Acadian Lines	Halifax to Sydney
Handi Trans	Sydney, North Sydney, Sydney Mines, Glace Bay

Rail Service

The only passenger rail service on Cape Breton is the Bras d'Or operated by VIA Rail. The Bras d'Or provides a daytime service between Halifax and Sydney from June 5 to October 17 and has been running for three years. This service caters almost exclusively to tourists, as the $225 one-way fare does not make it a viable commuter service for residents.

- The Bras d'Or offers only one class (economy class), which includes meals, access to a panoramic dome and presentations by a tourist guide (in period costume) on the train. The journey includes a one-hour stop in Port Hawkesbury, which gives passengers the opportunity to browse through the stores and meet local people. The Bras d'Or is also testing an innovative new GPS information system, which provides passengers with a commentary on the surrounding area based on the train's actual position on the route.
- Demand for the service has been steadily increasing over the last three years (it generally takes at least three years to build significant interest in a new tourism package like this). For the 2002 season the northbound trips have been averaging 115 passengers (approximately 58% of capacity), while the southbound is substantially less at around 30.
- Because the Bras d'Or caters to the tourist market, its success is very dependant on tour operators selling the product. The journey is popular with some tour operators who incorporate the Bras d'Or into their itineraries, sometimes using it as an alternative to motorcoach travel in one direction.
- The Bras d'Or is sometimes used as a link for itineraries in other provinces. The appeal to tour operators is somewhat restricted by the train's limited schedule.
- The Bras d'Or only makes the return journey once a week from June to October.
- The train is also used on the Montreal to Halifax route.
- The Bras d'Or journey is only made possible because the train has two spare days in Halifax, so the service is contingent on the availability of equipment.

Figure 2.2: Bras d'Or Rail Service Route and Schedule

Trip	Departure Time	Arrival Time	Day
Halifax to Sydney	07:30	18:15	Tuesdays
Sydney to Halifax	07:30	10:50	Wednesdays

- The journey is currently 10- hours and 45 minutes long, including the stop at Port Hawkesbury. The length of time for the journey is dictated by the approved running speed for the tracks, which is limited to 35mph. This also limits the possibility of including further stops on the itinerary, as the journey is already almost 11 hours long.

ACCOMMODATIONS BASE

We have prepared an extensive inventory of Cape Breton's roofed accommodations and campgrounds, as reported in Appendix B. The inventory indicates a total of approximately 282 establishments offering 3,700 roofed accommodation rooms/units available either year-round or seasonally, as shown in Figures 2.3 and 2.4.

Figure 2.3: Number of Roofed Accommodation Establishments by Type and Region

Roofed Accommodation	Cabot	Ceilidh	Bras d'Or	Fleur -de-lis	Metro CB	Marconi	Total
Hotel, motel, motor hotel	30	7	12	9	16	2	76
Country Inn	11	5	3	2	1	0	22
Resorts and Lodges	10	0	2	2	0	0	14
B&Bs and Tourist Homes	47	11	13	16	16	2	105
Cabins/Cottages	34	9	8	10	1	3	65
Total	**132**	**32**	**38**	**39**	**34**	**7**	**282**

Source: Economic Growth Solutions inventory analysis, 2002

The preceding chart indicates that 47% of all accommodation establishments in Cape Breton are located along the Cabot Trail, which is the Island's prime touring route. By comparison there are relatively few accommodation establishments in the other touring regions on the Island, although Metro Cape Breton is relatively well-served with roofed accommodations as it has several very large properties including four with more than 100 rooms.

Specific gaps in the accommodations infrastructure include the following:

- Generally limited availability of high quality accommodations outside the Baddeck and Metro Cape Breton areas
- A lack of hotels, motels and resorts along the Ceilidh Trail
- Limited accommodations outside Louisbourg and Port Hawkesbury along the Fleur-de-lis Trail
- Lack of high-end seaside resort properties other than Keltic Lodge
- Very limited accommodation available along the Marconi Trail.

Figure 2.4: Number of Roofed Accommodation Units by Type and Region

Roofed Accommodation	Cabot	Ceilidh	Bras d'Or	Fleur -de-lis	Metro CB	Marconi	Total
Hotel, motel, motor hotel	539	221	201	221	907	18	2,107
Country Inn	149	37	0	17	10	0	213
Resorts and Lodges	461	0	100	10	0	0	571
B&B and tourist houses	153	34	33	45	47	15	327
Cabins/Cottages	277	86	43	48	11	9	474
Total	**1,579**	**378**	**377**	**341**	**975**	**42**	**3,692**

Source: Economic Growth Solutions inventory analysis, 2002

The majority of accommodation units are provided by the hotels/motels/motor hotels category (57%), with resorts and lodges being second most prevalent with 15% of the total inventory, followed by cabins/cottages at 13%, B&Bs/ tourist homes at 9%, and country inns at 6%.

The Cabot Trail offers over 40% of Cape Breton's roofed accommodation units, with a further 26% available in Metro Cape Breton (see Figure 2.5).

- Metro Cape Breton has over 40% of the hotel/motel inventory.

- Most resorts/lodges and country inns are located along the Cabot Trail.

Figure 2.5: Distribution of Accommodation Units by Region

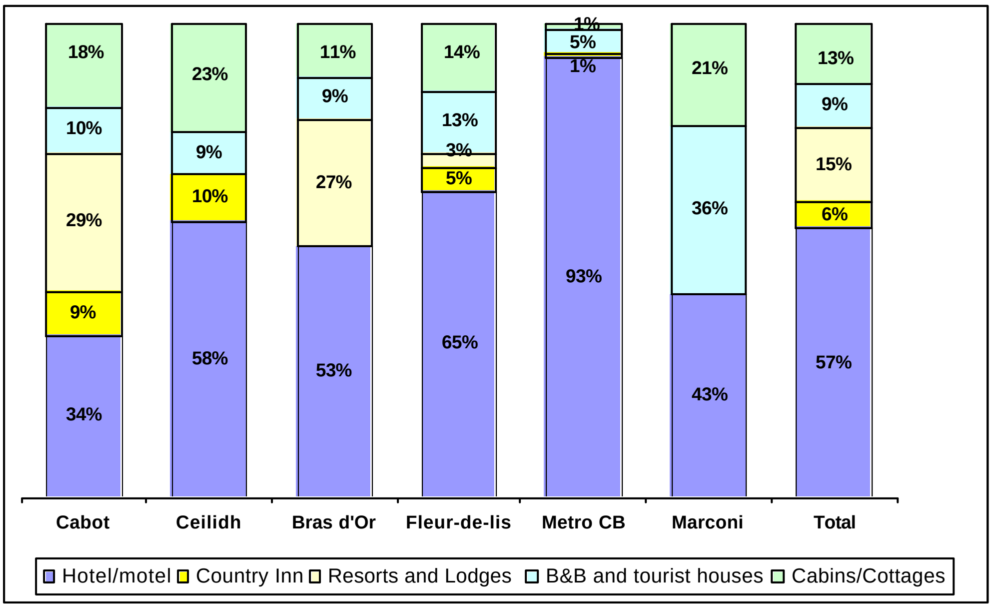
Roofed Accommodation	Cabot	Ceilidh	Bras d'Or	Fleur -de-lis	Metro CB	Marconi	Total
Hotel, motel, motor hotel	26%	10%	10%	10%	43%	1%	100%
Country Inn	70%	17%	0%	8%	5%	0%	100%
Resorts and Lodges	81%	0%	18%	2%	0%	0%	100%
B&B and tourist houses	47%	10%	10%	14%	14%	5%	100%
Cabins/Cottages	58%	18%	9%	10%	2%	2%	100%
Total	**43%**	**10%**	**10%**	**9%**	**26%**	**42**	**100%**

Source: Economic Growth Solutions inventory analysis, 2002

- The B & Bs category seems to be the most widespread with at least 5% of these types of units available in all regions, as shown.

In the Sydney area, accommodation is primarily hotel/motel, while along the Cabot Trail all types are well-represented, as shown in Figure 2.6.

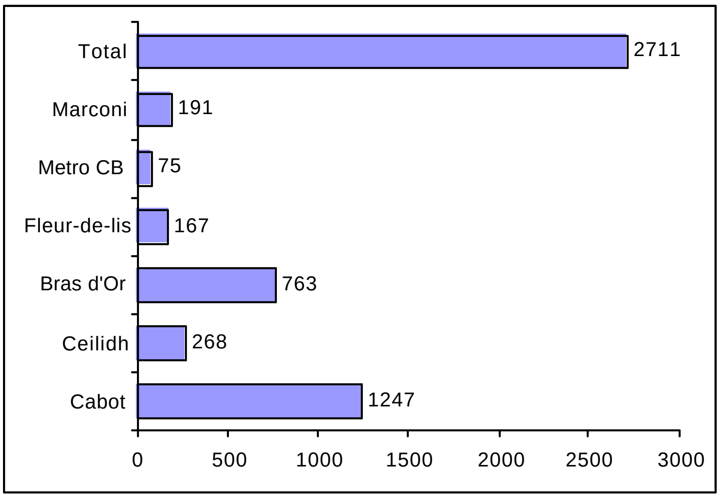
Figure 2.6: Distribution of Accommodation in Units by Type



Source: Economic Growth Solutions inventory analysis, 2002

Three-quarters of Cape Breton's campground infrastructure is located on the Cabot and Bras d'Or Lakes Trails. These account for 74% of the 2,711 campsites, as shown in Figure 2.7, with the Cabot Trail alone accounting for 46% of the total number of campsites at campgrounds.

Figure 2.7: Regional Distribution of Campsites at Campgrounds



Campgrounds	Cabot	Ceilidh	Bras d'Or	Fleur -de-lis	Metro CB	Marconi	Total
No. of Campsites	1,247	268	763	167	75	191	2,711
% of Campsites	46%	10%	28%	6%	3%	7%	100%

Source: Economic Growth Solutions inventory analysis, 2002

- The Cabot Trail includes seven Parks Canada campgrounds, which contain approximately 550 sites.

ATTRACTIONS BASE

Cape Breton's attractions base is diversified, as shown in the inventory of Appendix C.

Heritage/cultural attractions, outdoor activities, parks and natural features, golf courses, other attractions, and festivals/events all feature prominently in the inventory and the total number of attractions by category is shown in the table below (Figure 2.7).

Figure 2.7: Diversified Attractions/Points of Interest

Type of Attraction/Point of Interest	Estimated Number	%
Heritage (incl. plaques)	119	29
Outdoor Adventure / Ecotourism	79	19
Parks and Natural Features	36	9
Other Attractions	4	1
Golf Courses	11	3
Festivals / Events	162	39
Total	**411**	**100**

Source: Economic Growth Solutions inventory analysis, 2002

Each of these categories has incremental tourism development potential. In general, attractions development in recent years has been relatively limited. The principal developed attractions (e.g. Fortress Louisbourg, Bell Museum) are 20-30 years or more in age and, in some cases, in need of renewal. Additions to the attractions base in recent years have primarily been small-scale museums, cultural centres, art galleries and craft shops which add to the activity base for visitors, but are not demand generators in and of themselves.

Cape Breton's principal festivals and events have been listed in Appendix D.

- The major issue is the strong focus in the summer season, with a relatively limited number of offerings the rest of the year.
- Many existing festivals/events have incremental development potential, plus there is a need to offer more during the spring and fall shoulder seasons.

Quantity, consistency and standards are also a key issue regarding attractions, festivals and events.

OUTDOOR ADVENTURE

Appendix C also includes a listing of the principal outdoor adventure operators located in Cape Breton. A total of 79 operators are listed, with the following regional break-out:

- Bras d'Or Lakes - 9 operators

- Cabot Trial - 48 operators
- Ceilidh Trail - 5 operators
- Fleur-de-lis and Marconi Trails - 13 operators
- Metro Cape Breton - 4 operators.

The majority of the outdoor adventure operators offer fishing (both saltwater and freshwater) and/or whale-watching, as well as a significant number offering guided adventures of more than one type (e.g. kayaking, hiking and biking). There are also several operators that offer winter adventure activities.

PARKS AND NATURAL FEATURES

The inventory of Appendix C also lists the various Provincial Parks and some of their key features, again by region. In addition to Cape Breton Highlands National Park with its wealth of protected natural resources, trails and interpretive features, there are a total of 30 Provincial Parks located throughout Cape Breton and distributed by region as follows:

- Bras d'Or Lakes - 10 Provincial Parks
- Cabot Trail - 8 Provincial Parks
- Ceilidh Trail - 4 Provincial Parks
- Fleur-de-lis and Marconi Trails - 8 Provincial Parks

These parks usually offer picnic areas, trails and sometimes campsites, swimming beaches and specific interpretive features.

GOLF COURSES

A total of eleven golf courses are located throughout Cape Breton (see Appendix C). Six of these are 18-hole courses, while the other five offer 9 holes. Additional courses are being planned. Of particular note are the "Fabulous Foursome" golf courses which are 18-hole championship courses designed to attract golf vacationers to the Island – these include Highland Links in Cape Breton highlands National Park, Bell Bay Golf Club at Baddeck, Dundee Golf Club at Dundee, and le Portage Golf Course at Cheticamp.

3 – TOURISM TRENDS

We have examined a wide range of trends and their implications for Cape Breton, including the following:

- International tourism growth and general trends
- Changing demographics
- Impacts of technology
- Accommodations preferences and quality expectations
- Packaging and marketing
- Cultural/heritage tourism
- Motorcoach tours and cruises
- Meetings/conventions
- Adventure travel/ ecotourism/ outdoor recreation (including snowmobiling, golfing)
- Trends in the spa market segment.

INTERNATIONAL TOURISM GROWTH AND GENERAL TRENDS

World Tourism grew steadily up to 2000 at 4% per annum. The World Tourism Organization (WTO) preliminary figures for 2001 show international tourism arrivals fell by 1.3 % to 689 million. This was as a result of September 11th terrorist attacks and the economic downturn in major tourism generating markets. However, 2000 was also an exceptional year for tourism with special millennium events boosting international arrivals by seven per cent.

Based on 2002 performance to date, tourism appears to be on its way to recovery. In Canada, this has been aided by the one-time funding of $15 million provided to the CTC.

- This investment has been directed at some of Cape Breton's key target markets – domestic market and northern tier states (where Americans have a high propensity to travel to Canada by automobile).
- Statistics Canada research indicates this marketing investment has been paying off. The total international overnight travel to Canada increased 4% in March 2002 because of a greater number of Americans travelling to Canada (+6.5%), especially tourists entering the country by car (15.9%).

The WTO predicts tourism will continue to grow at approximately 4% per annum from 2003 and likely surpass 1 billion international travellers by 2010 and 1.6 billion by 2020.

Several factors are changing the way tourism products are experienced and presented:

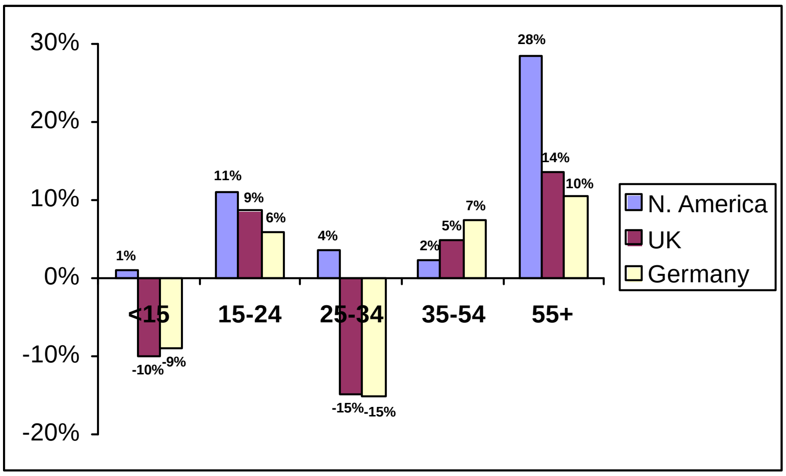
- Increasing environmental awareness among the general population and travellers.
  - According to Association of British Travel Agents (ABTA), 85% of UK travellers believe it is important not to damage the environment.
  - Majority (64%) also stated they would be prepared to pay 2-5% extra for environmental and social guarantees.
- Growing interest in soft adventure and nature-based tourism as these types of product become more mainstream.
  - Nature-based tourism has been increasing at a rate of 10% to 30% annually according to the World Resources Institute.
- Closely linked to nature-based tourism is educational tourism and learning vacations, which have increased in popularity, as a result of higher educational levels of the travelling public.
- Travellers are becoming more sophisticated and, as a result, expect a higher product quality and better value, which increases demand for high quality accommodations and authentic/genuine experiences and products

Cape Breton is well placed to take advantage of the ageing population trend. According to the CTC, tourism growth over next decade will be very strong, as ageing population has produced disproportionate number of people who have high propensity to travel and time and money to do so.

Aging of the “baby boomers” (born 1945 to 1964), over next 15 years will create significant opportunities for Cape Breton, as proportion of population over age 55 increases dramatically.

- By 2010 approximately 30% of North American population will be 55+ and will likely inherit $4 to $8 trillion.

Figure 3.1: Percent Change in Selected Age Groups, 2000-2010



- There will also be significant opportunities to attract the "Generation X" (born 1965 to 1980) age group, as these younger well-educated adults begin to fill senior positions left vacant by retiring boomers and subsequently have much more disposable income.

There is also a trend towards short-term getaways as people can afford less time away from home and work. Consumers now often prefer to take a number of shorter vacation trips rather than one longer trip annually. This trend has been observed in the types of packages that tour operators are providing:

- Cruise market is starting to offer this type of product with a number of 4-5 day cruises now available from New York.
- Specialty operators, such as Smithsonian Study Tours, are beginning to offer weekender products than are only 2-3 days in length and target a young demographic that can afford less time away from work.
- Birding and nature operators such as Victor Emanuel Nature Tours also recognize this trend and are creating shorter itineraries to attract a younger market.

Tourism and tourism marketing is becoming increasingly competitive nationally and internationally. Cape Breton and Nova Scotia operate in an environment of increasing tourism marketing expenditures on the part of the domestic and international competitors.

- As a result of September 11th, provinces such as PEI have doubled their tourism investment to $6.8 million for 2002. A large portion of this will be spent in the U.S. market as they believe Americans are more likely to drive than fly to vacation destinations.
- Other provinces spend much more on tourism marketing and recent estimates indicate the following government tourism marketing expenditures:
  - Quebec - $81 million
  - Ontario - $47 million
  - British Columbia - $27 million.
- States such as Colorado provide a first-hand example of the importance of maintaining market profile via marketing and promotion. Following a cut in tourism funding after 1993, Colorado lost 33% of its market share after peaking in 1994 as a residual result of the $12 million effort in 1993.

Marketing is becoming more targeted and focused on specific niches. Word-of-mouth, including friends and relatives, remains primary source of information for people choosing their next vacation.

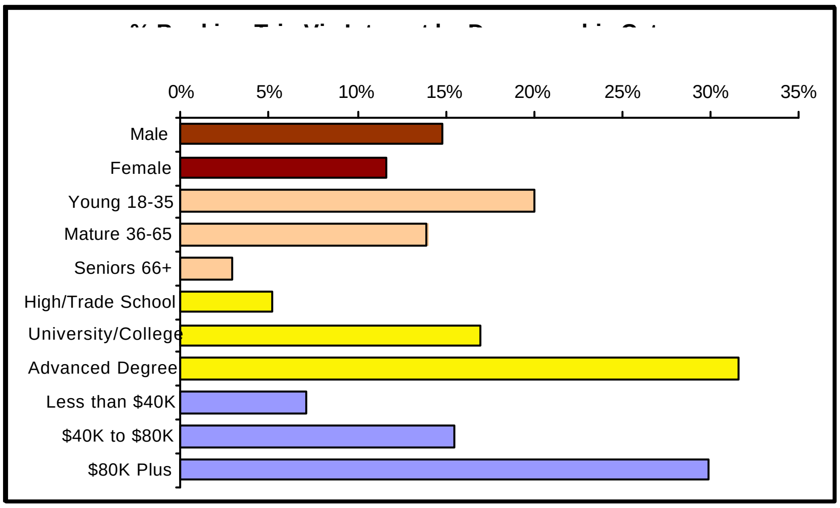
- Marketing partnerships and co-operative marketing strategies are very effective.
- The performance of businesses who engage in co-op marketing strategies are typically better than those without, as it is possible to put more resources into creating interest in the marketplace.
- Magazines and publications remain an important media for specialty groups. For example, large proportions of ecotourists, adventure and cultural travellers regularly read or subscribe to nature, adventure and culturally themed publications (e.g. National Geographic, Outside, Smithsonian to name a few).
- Associations, clubs and groups are still an effective way of targeting specialty travel markets. These organizations are important marketing channels for the various different activity-oriented sub-segments of the market.

The primary impact of technology is the increasing role of the Internet and e-commerce for tourism marketing and sales.

- Overall, as of 1999 approximately 14% of North Americans have personally booked at least one trip through the Internet during previous two years.

- Americans are almost three times as likely as Canadians to book a trip via the Internet, as of 1999 (14% compared to 5%).
- The majority of North Americans booking Internet trips are well educated, have higher household incomes and are generally younger in age, as shown in Figure 3.2.

Figure 3.2: Percent Booking Trips Via Internet by Demographic Category



Source: Travel Activities & Motivation Survey (TAMS) 1999

TOUR PACKAGING TRENDS

Packaging continues to grow as a form of tourism product distribution. Travellers are interested in a range of activities and as a result packages are being created that offer a variety of experiences – as a specific activity or interest may not be the primary focus of a trip.

- Tour operators are becoming more flexible in their arrangements offering clients a variety of rate structures and customizing packages when requested.
- Large tour wholesalers have traditionally sold products through retail travel agencies, although this has does not excluded direct sales to consumers.
  - Travel agents will play less of a role as time goes on, with more clients booking directly with tour operators on-line.

- E-commerce will play an increasingly more important role in tourism business management and marketing. Some tour operators are already receiving the majority of their business via e-commerce

Accommodation preferences and quality expectations have been changing, both in general and for package tour operators in particular. Travellers are becoming more discerning and better educated about tourism experiences and products. As a result product quality expectations are higher.

- Price is not always most important factor for tour operators and tourists booking accommodation – however, value for money is of paramount importance.
- The types of accommodations used by tour operators varies considerably and is usually determined by the type of clientele they cater to.
- The majority of tour companies focus on the mature travellers market (55+).
  - Many of these clients are retired and on fixed incomes so many tour companies targeting these seniors tend to offer packages based on 3-star accommodations.
  - However, there are still a significant number of affluent seniors (usually retired professionals) who can afford a higher standard of accommodation (e.g. 4 or 5-star), so some tour operators prefer high end accommodations.
- Tour operators frequently choose accommodations affiliated with well-known chains that give their clients a degree of comfort, as they know what to expect from these familiar brands.

Specialty tour operators have different accommodation needs than mainstream tour operators. This is because their groups are substantially smaller and they are offering clients a more intimate experience.

- Generally group size for specialty operators does not exceed 20 travellers.
  - To enhance this more personal experience, they prefer smaller accommodation facilities that can offer their clients this personal service.
  - Small heritage hotels, lodges and inns are generally preferred by these operators who frequently specialize in specific activities and themes for their tours.
- For adventure tour operators, accommodations are typically a less integral part of the experience.

- However, for those that cater to high-end markets (e.g. often older clientele, 55+) high quality, uniquely-designed accommodation facilities can be a highlight of the experience and a key selling feature.

♦ Adventure and ecotourism operators who offer clients a high end nature experience require 4-star accommodation facilities, while other operators offer a more rustic product for which clean and tidy 3-star lodge or cabin accommodation is more appropriate.

♦ Specialty operators generally prefer boutique and locally owned facilities over large hotel chains.

CULTURAL AND HERITAGE TOURISM TRENDS

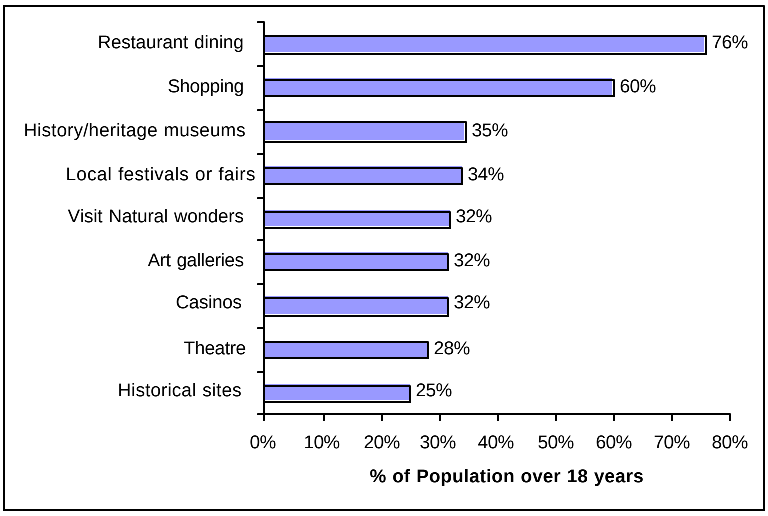
Tourists are looking for more interactive vacations and products that enable them to experience and learn about history and culture.

♦ Canadians are attracted by culture and heritage activities, which led to an increase of 10% in this type of trip between 1996 and 1999.

- During 1999, Canadians took 16 million trips in Canada involving at least one culture/heritage activity.

The economic benefits of culture/heritage trips are substantial, according to Statistics Canada. While they accounted for only 11% of all trips, they generated 21% of Canadians' travel expenditures within Canada in 1999.

Figure 3.3: Most Popular Cultural Activities for North American Vacationers

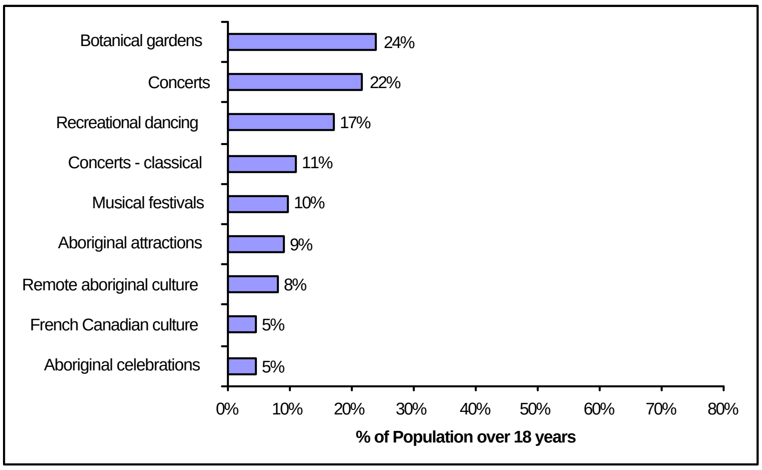


Source: Travel Activities & Motivation Survey (TAMS) 1999

- Cape Breton well-positioned relative to popular cultural heritage activities.

Concerts, dancing and music festivals all represent significant cultural market segments. Some of the other cultural activities like Aboriginal attractions and French Canadian culture are also some of Cape Breton's product strengths, as shown in Figure 3.4.

Figure 3.4: Other Cultural Activities of North American Vacationers



Source: Travel Activities & Motivation Survey (TAMS) 1999

- Canadians vacationers are more likely than Americans to have visited French Canadian culture attractions.

The U.S. market for cultural/heritage tourism is significant.

- One-third of U.S. adults took a historic or cultural trip in the past year.
  - Some 53.6 million took a trip to a historic place or museum
  - 33 million reported taking a trip to a cultural event or festival.
- Historic/cultural travelers spend more.
  - Historic travelers spent on average $688 (mean) on their trip
  - Cultural travelers spent an average of $557
  - By comparison, U.S. travelers in general averaged only $425 per trip.
- Historic and Cultural Travellers are a little older (48 years average) and more likely to be retired, while an above average number also have postgraduate college educations.

CRUISE MARKET TRENDS

The cruise market has been growing steadily over the last decade, as many prefer an all-inclusive vacation. Sydney has become an important port-of-call for a number of cruise ship itineraries, providing an opportunity for other businesses to capitalize upon this market.

- Factors such as repositioning of ships to convenient North American ports, new programs and enhancements, and current pricing levels have contributed to growth in cruising for Cape Breton.
- According to Cruise Lines International Association (CLIA), nearly 1.7 million North American passengers cruised during the first quarter of 2002, a 1.6% increase over same period in 2001.
- Based on the capacity of new ships and current bookings, total number of passengers for the North American market should reach 7.4 million by the end of the year.
- Since 1981, growth in cruise capacity has averaged 7.6% annually and based on current information, capacity under contract or planned is expected to increase at an average rate of 7.9% over next five years.

While Florida still dominants the cruise ship departures from the east coast, there has been a large increase in sailings from other east coast ports.

- According to CLIA, cruises departing from Boston have nearly doubled since 1994, from 23 to 42,
- Cruises departing from New York have also risen from 156 to 227 during that same time frame.

The demographics of cruisers are also changing, as companies like Carnival target younger travellers with their fun/adventure ships.

- In 1986, the average age for cruisers was 56.
- Average age for those who have cruised in past five years is only 50, while the average age of cruising prospects is 43.

MOTORCOACH TOUR MARKET TRENDS

The motorcoach tours market remains static in North America, but the overall size of segment is still very substantial. According to the American Bus Association, motorcoaches in the U.S. and Canada carried an estimated 860 million passengers in 1999.

- 774 million (90%) of them were in the United States

- By comparison commercial air carriers moved only 568 million, and commuter rail and Amtrak approximately 377 million.

The motorcoach industry is comprised of mostly small businesses with 65% of carriers operating fewer than 10 buses. However, these small companies carry an estimated 97 million passengers. The economic impacts of this market segment are significant:

- A fully loaded motorcoach (46 passengers on average) on a charter or tour with an overnight stay contributes an average of $5,000 to $7,500 (US) per day to the local economy in expenditures (e.g. meals, lodging, shopping, admission fees, souvenirs, and local taxes).

Entertainment, gaming, and sightseeing are motorcoach tours' most popular activities, with soft adventure fast-growing. Cape Breton has the potential to provide the types of activities that motorcoach groups are seeking, particularly with the strong trend towards soft adventure and the demand for theatre and live performances, as shown below.

Figure 3.5: Motorcoach Tour Activity Preferences

Most Popular Types of Activities for Motorcoach Groups

1999	2000	2001	2002
1. Theatre / Shows 2. Gaming 3. Sightseeing	1. Dinner Theatre / Live Performances 2. Gaming 3. Sightseeing	1. Dinner Theatre / Live Performances 2. Gaming 3. Sightseeing	1. Dinner Theatre / Live Performances 2. Gaming 3. Sightseeing

Fastest-Growing Type of Activities for Motorcoach Groups

1999	2000	2001	2002
1. Gaming 2. Theatre/Shows 3. Soft Adventure	1. Gaming 2. Soft Adventure 3. Theatre	1. Gaming 2. Dinner Theatre / Live Performance 3. Soft Adventure	1. Gaming 2. Soft Adventure 3. Interactive/hands-on activities; Dinner Show/Live Performances

Source: American Bus Association, 2002

MEETINGS AND CONFERENCES MARKET

The meetings and conference market provides an opportunity for Cape Breton and continues to grow. The U.S. market illustrates the potential size of this sector and the significant growth it is experiencing. According to the Meetings and Conventions (M&C) magazine's "Meetings Market Study", there were over one million meetings in the U.S. with expenditures totalling $40 billion, as shown in Figure 3.6.

Figure 3.6: U.S. Meetings/Conventions and Expenditures

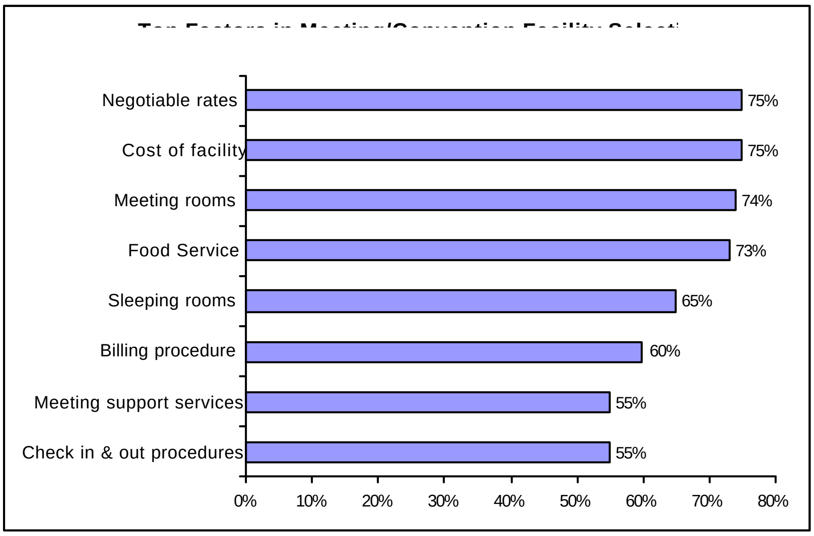
Type of Meeting	Total meetings	Expenditures (yearly)
Corporate	835,700	$10.2 billion
Association	174,200	$13.7 billion
Conventions	11,600	$16.3 billion
Total	**1,021,500**	**$40.2 billion**

Source: M&C Meetings Market Study 2000

Cape Breton's market potential is predominately regional and provincial with some national meetings/conventions possible.

Negotiable rates, costs of facilities, and suitability of meeting rooms are key factors in meeting facility selection by planners/organizers. However, destination draw and appeal is a significant factor.

Figure 3.7: Top Factors in Meeting/Convention Facility Selection



Source: M&C Meetings Market Study 2000

The majority (63%) of meeting/conventions are conducted in downtown hotels, followed by suburban hotels (50%) and resort hotels (44%).

Incentive Travel in the U.S. is a related very large and growing market.

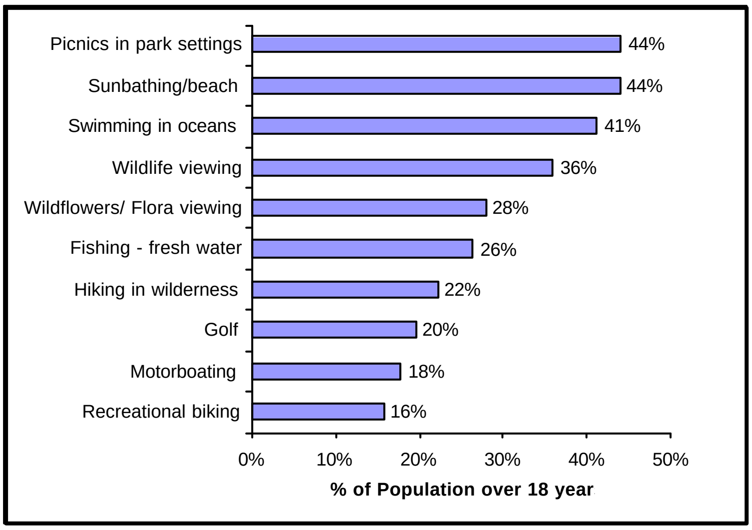
- According to the M&C Meetings Market Study American companies organized over 100,000 incentive trips in 1999 for over 6.5 million attendees.
- Individual incentive trips experienced a significant increase in duration from 4.7 days in 1997 to 5.2 days in 1999, which is encouraging for longer haul destinations like Cape Breton.

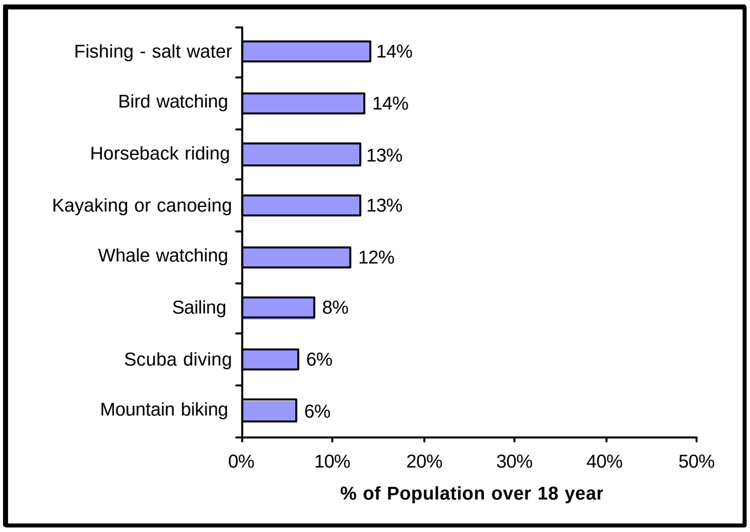
OUTDOOR ADVENTURE/ECOTOURISM TRENDS

Nature-based tourism has been increasing at a rate of 10% to 30% annually in recent years. By comparison, tourism overall worldwide has been growing at average annual rate of only 4%, according to World Resources Institute. Nature-based tourism accounted for approximately 20% of all international travel, according to WTO, and 7% of the US$445 billion total international travel expenditures during 1998.

Cape Breton is well suited to cater to popular activities such as beaches, swimming, fishing, paddling, whale watching, sailing and mountain biking.

Figure 3.8: Most Common Outdoor Activities While on Vacation for North Americans

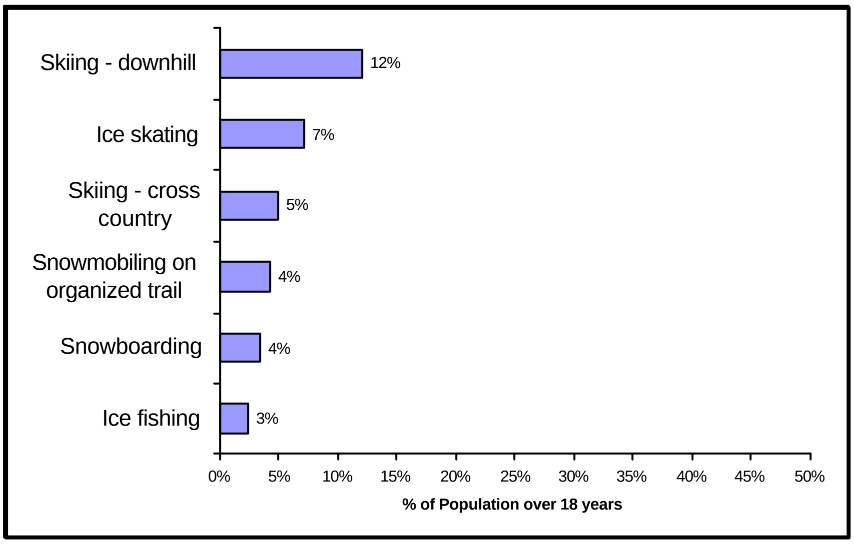




Source: Travel Activities & Motivation Survey (TAMS) 1999

There is a smaller demand for winter activities from North American vacationers. Cape Breton Island, particularly in the north, offers quality winter activities such as downhill cross-country skiing, snowshoeing and snowmobiling, although these have a smaller market draw than summer activities, as shown in Figure 3.9.

Figure 3.9: Canadians' Participation in Winter Tourism Activities



Source: Travel Activities & Motivation Survey (TAMS) 1999

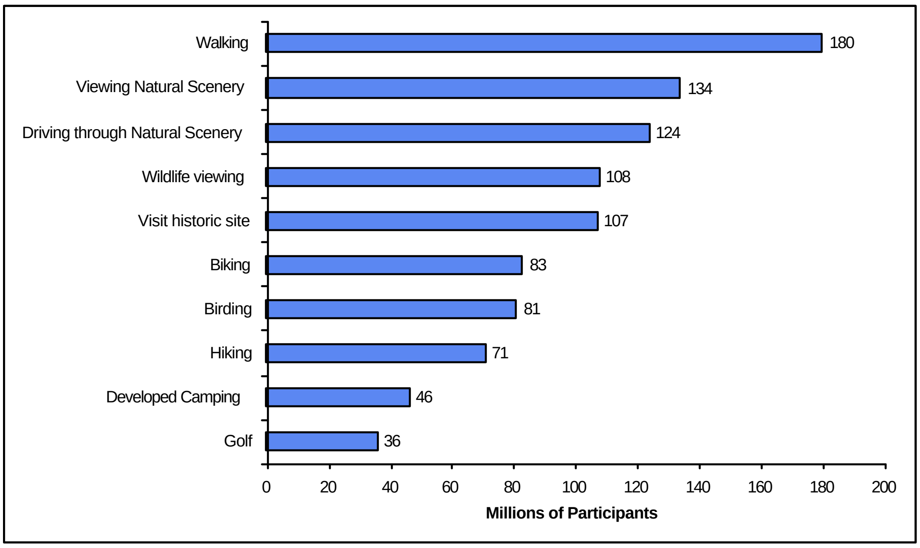
Canadians are far more likely to participate in winter activities than their U.S. neighbours while on vacation, so the winter market is primarily domestic.

U.S. Outdoor Adventure Ecotourism Trends

U.S. markets show high participation levels for outdoor activities. According to the USDA Forest Service, 97.5% of Americans over the age of 16 (207 million) participate in outdoor activities.

U.S. participation in outdoor activities in which Cape Breton has excellent resources is high, as shown in Figure 3.10.

Figure 3.10: U.S. Participation in Land-based Adventure/Ecotourism Type Activities

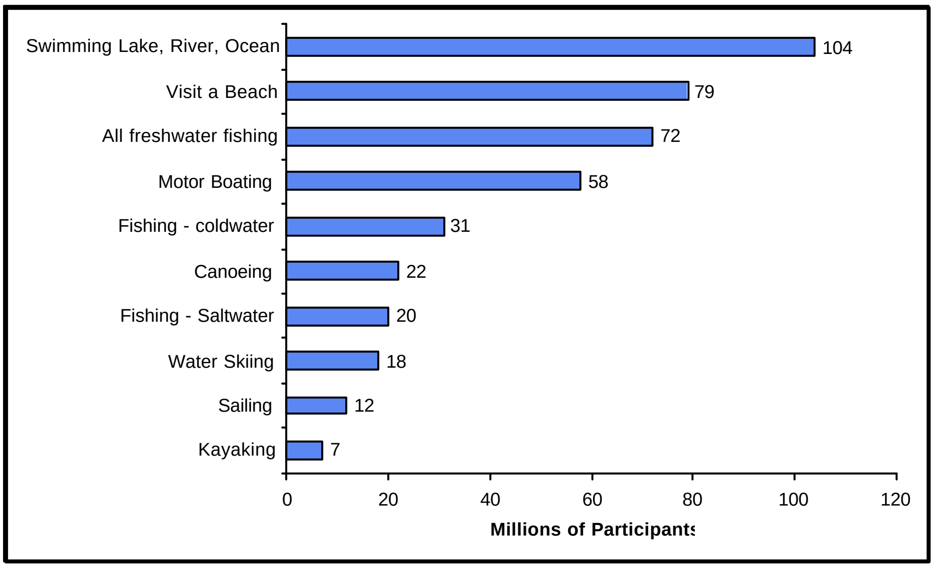


Source: USDA Forest Service, 2000

- Activities such as walking in natural areas, viewing natural scenery, swimming, outdoor adventure and wildlife viewing all have well over 100 million participants (over half the U.S. adult population).

Swimming, beaches, fishing and boating are product strengths in specific areas of Cape Breton. Therefore, Cape Breton Island is well-positioned to take advantage of high U.S. demand for these marine-based activities with high participation levels, as shown below.

Figure 3.11: U.S. Participation in Marine/ Water-Based Tourism



Source: USDA Forest Service, 2000

The demographics for U.S. outdoor adventure/ecotourism travellers vary by market niche. Activities such as wildlife viewing and hiking generally have strongest appeal to older travellers than more strenuous or technical activities (adventure products), as indicated in Figure 3.12.

Figure 3.12: Demographics for U.S. Adventure/Ecotourism – Activities Undertaken While on Vacation

Activity	Campers	Hikers	Bikers	Wildlife Viewers	Canoers
Millions (#)	64.7	44.8	27.2	24.3	22.5
Gender					
Male	52%	51%	49%	45%	51%
Female	48%	49%	51%	55%	49%
Age Group					
18-24	19%	17%	22%	17%	19%
25-34	27%	24%	25%	20%	26%
35-44	29%	32%	33%	27%	31%
45-55	15%	15%	12%	16%	14%
55-64	8%	8%	7%	12%	9%
65 +	3%	5%	1%	8%	1%

Source: Travel Industry Association of America (TIAA), 1997

- These are product niches that Cape Breton can capitalize on.

Cape Breton offers tremendous potential for sea kayaking along coastal routes and around smaller off shore islands. Also great potential exists on inland water, including Bras d'Or Lakes and Margaree and Mira Rivers. Recent growth in sea kayaking and touring products and use of outfitters for these trips, has occurred in both eastern and western Canada, as well as the U.S. The successful National Sea Kayak Program launched two years ago has contributed to rise in popularity of sea kayaking in Canada.

Participation in wilderness canoe trips has declined somewhat. U.S. Canoers tend to be:

- Fairly young with over half (57%) between the ages of 25 and 44.
- For 55% of canoers, canoeing was the primary reason for the trip.
- Adventure travelers from the Midwest are the most likely to be canoers (34%).

Wildlife-viewing, birding and nature photography are growth markets. Cape Breton is well-positioned to take advantage of this growth, with its numerous marine mammals, unique birds (e.g. Bicknell's Thrush) and other land mammals such as moose. Participation in this activity will continue to grow as the population ages and environmental and ecological awareness increases.

- This is single most popular soft adventure activity for adventure/eco travelers aged 55 and over in the U.S.
- Wildlife viewers are more likely to be:
    - Female (55%)
    - Older with almost two-thirds (63%) over the age of 35 and 20% over 55 years old.
    - Retired (14%)
    - Higher spenders per trip with a median of $390.
    - Adventure travelers from the U.S. Midwest are the most likely to be wildlife-viewers (34%)

Hiking/walking is one of America's fast growing recreational activities. With resources like Cape Breton Highlands National Park and numerous other protected areas and provincial parks, Cape Breton already has some of the infrastructure in place to cater to this fast-growing market segment.

- More than 155 million people walk for pleasure and this is expected to increase by 93% over the next 50 years according to USDA Forest Service.
- Between 1982 and 2000 the number of hiking participants increased by 196% and backpacking by 73% according to the American Hiking Society.
- Hikers tend to be:
  - Fairly young, with almost three-quarters (73%) being between 18 and 44 years of age.
  - Almost half (45%) are in a managerial/professional occupations
  - Adventure travelers from Northeast U.S. are most likely to be hikers (56%).

The cycling market segment is also growing nationally and internationally. Cycling is popular within North America, with 16% of residents age 18 and over participating in recreational biking while on vacation. Mountain biking is a smaller but growing segment with 6% participating in mountain biking while on vacation.

- Some of Cape Breton's popular scenic driving routes are also ideal for cycle touring, with challenging terrain and great scenery.
- Cyclists are generally:
  - Middle-aged with one-third in 35-44 age group, although there are a significant number (25%) of older 'Generation X' cyclists in 25-34 age group
  - Almost half (47%) are in managerial/professional occupations
  - Adventure travellers from Northeast U.S. are the most likely to be cyclists

FISHING MARKET TRENDS

Over 72 million U.S. residents participated in freshwater fishing in 2000. Thirty-one million were coldwater anglers (e.g. trout) and 8 million fished for migratory species (e.g. salmon). There were approximately 4.2 million Canadians that participated in recreational fishing, according to a 1996 survey by Environment Canada. Cape Breton offers anglers great salmon fishing on the Margaree River as well as fishing for other species on freshwater lakes, rivers and the coastal waters. The majority (66%) of Canadian anglers are male and ages 35-44, and 31% are 45+, as shown in Figure 3.13.

Figure 3.13: Canadian Recreational Fishing Demographics

Gender	%
Male	66.3%
Female	33.7%
Age group	
15-24	18.7%
25-34	23.5%
35-44	26.8%
45-54	16.2%
55 +	14.8%

Source: Environment Canada, 1996

SNOWMOBILING TRENDS

Snowmobiling may be an opportunity for Cape Breton to help extend its strong summer and fall seasons. Almost 1.4 million Canadians (5% of the population age 12 and over) enjoy recreational snowmobiling and 1.26 million Canadian households own one or more snowmobiles.

- The size of snowmobiling tourism market is substantial, with an estimated 954,000 North Americans taking an overnight snowmobile trip in Canada in 1999, as shown in Figure 3.14.

Figure 3.14: Snowmobiling Participation on Winter Leisure Trips

Market	Volume
Domestic	845,000
Western	*93,000*
Central	*104,000*
Ontario	*365,000*
Quebec	*234,000*
Atlantic	*46,000*
U.S.	75,000*
Overseas	34,000*
Total	954,000

Source: CTS and ITS Special Snowmobile Tabulations (estimated)

- Expenditures are fairly significant, with an estimated $122 million generated in Canada by overnight snowmobile tourism.
- Overnight snowmobilers are predominately male (70%) and ages 25 to 44. There are more young (18 to 24) Canadian snowmobilers than their American counterparts.
- Nearly half (48%) of all domestic snowmobile travellers are from Ontario, with a further one-quarter (23%) from Quebec. Atlantic Provinces combined contain only 5% of Canada's leisure snowmobile travellers – a relatively small market

Introduction of a mandatory permit in Nova Scotia is seen as an initiative that will help expand the trails infrastructure and bring it in line with the majority of provinces who currently operate a mandatory permit system, such as PEI and New Brunswick.

GOLFING MARKET

The golfing market continues to show strong growth. Canada has highest golf participation rate in the world (20.5%), making golf one of its most popular sports. The participation rate in Nova Scotia is just over 14%.

According to the Royal Canadian Golf Association (RCGA), there are currently 5.2 million golfers in Canada, an increase of 400,000 since 1996.

- Much of this increase has been attributed to the growing number of women playing golf.
- Women now represent 50% of all new players.

The U.S. has also seen tremendous growth in golf with the number of players increasing from 17 million in 1985 to over 26 million in 1999. The majority of this growth was experienced in the late 80s and early 90s.

- Approximately 20% of North Americans 18 and over play the occasional round of golf while on vacation and according to Golf Magazine, approximately 60% to 70% of golfers have taken golf vacations.

Cape Breton has a number of excellent golf courses – some (e.g. Highland Links) are acknowledged as among the best in the country. Potential exists in this growing market for Cape Breton to strengthen its position as a golf destination.

TRENDS IN THE SPA MARKET SEGMENT

While the spa concept has existed in Europe and Asia for centuries, it is a relatively newer concept in North America. Over the last two decades there has been substantial growth in the North American spa industry and during this time public perceptions have also changed, and it is only in the last five years that people have really begun to embrace the spa concept.

- The number of spas in Canada has increased dramatically over the last decade. Today there are approximately 1,300 spas across Canada according to the International Spa Association.
- The majority of Canadian spas are located in Quebec, while the second largest spa concentration is in Western Canada (British Columbia, Alberta and Saskatchewan).
- The U.S. spa industry is huge and is currently estimated to contain over 9,500 facilities, while only two years ago in 2000 this figure was approximately 5,700. The vast majority (77%) of these facilities are day spas.

The following table provides a breakdown of North America spa properties by type. As the chart illustrates, Canada contains significantly more hotel/resort spas and mineral springs spas than the U.S., while over three-quarters of the U.S. product consists of day spas.

Figure 3.15: Profile of the Spa Industry in North America

Type of Spa	Canada	U.S.
Day Spa	58%	77%
Resort/Hotel Spa	17%	8%
Mineral Springs Spa	10%	3%
Club Spa	11%	7%
Destination Spa	2%	1%
Medical Spa	2%	3%

Source: ISPA 2002 Spa Industry Study, 2001

Alternative Spa Concepts

Spas come in a variety of forms and each of these offers customers a range of products, services and experiences. According to the Canadian Spa Association, there are four categories of spas. These include:

- **Destination Spa** – a facility that is totally dedicated to the spa experience with professionally administered treatments, fitness programs, and cuisine designed to enhance your health and well-being.
- **Day Spa** – generally based around massage and facial treatments, the day spa creates a tranquil setting for people to escape to for a few hours. Typically located in urban areas, these are the most common form of spa.
- **Resort/Hotel Spa** – this type of spa adds a health, wellness and pampering element to a guest's stay at a hotel or resort. This is the second largest and fastest growing spa category, and may be well-suited to some of Cape Breton's higher end hotels and resorts.
- **Mineral Springs Spa** – this type of spa is based around either a cold or hot water source that can be used to provide treatments based on the water's restorative and health giving properties.

Changing Spa Market Characteristics

According to the International Spa Association, there were approximately 156 million spa visits in the United States in 2001. Day spas accounted for 68% (106 million) of these visits, while resort/hotel and club spas received the next largest numbers of spa visits.

- In spite of the economic conditions in the U.S., the number of spa visits continues to grow rapidly, increasing by 71% between 1999 and 2001.
- Industry revenues in the U.S. continue to grow, but at a more modest rate than in the past. Industry revenues increased by 114% between 2000 and 2002. However, the annual growth in revenues for individual spas has dropped from a high of 28% in 1999 to only 14% in 2000 and 8% in 2001.

Product Trends

A broader range of products and activities is being offered by resort/hotel and destination spas as they seek to expand their markets. Outdoor adventure activities such as hiking, biking and kayaking are becoming more popular spa offerings.

- There is also a strong trend toward medical-type products and services
- Branding is becoming popular for facilities and spa retail products
- Food and plant based treatments have also gained widespread popularity recently
- The Eastern/Asian influence continues to be very strong in the spa industry, influencing products, services and spa design.

Consumer Trends

The spa market is slowly beginning to broaden its scope to include more men and younger adults. In the past spa's customers have been almost exclusively comprised of women. In recent years male attendance at spas has increased from around 9% to 26% and this growth is expected to continue.

Figure 3.16: American Spa-Goer Profile

Age	The majority (66%) are women aged between 35 and 64 years. And 67% of the women are single females. The average age was 41-45 years
Gender	Three-quarters (74%) are female, while the male segment is increasing
Income	Spa-goers have large household incomes, 58% in excess of $100,000
Education	The majority are well educated, college graduates or higher
Motivations	1) Lack of time available for relaxation 2) Pampering and stress reduction
Trip duration	The average number of day spa visits is 5 per annum and resort/destination spas 2 per annum

Source: Wellness Resource Inc. and International Spa Association

- Many people no longer view spas as a luxury item/activity, but as a necessity in order to stay healthy. As a result, many insurance companies and medical practitioners have become more accepting of spa treatments as a remedy for certain ailments.

- Consumers are looking for simplicity in their spa experiences and are moving "back to the basics" and more traditional spa products.

Spas as a key facility amenity

- Spas continue to be a main component in the development of resorts and shopping malls.
- A recent study by the Wellness Resource Inc. of AAA's 4 and 5 star hotel and resort properties in the mid-west region of the U.S. revealed that 50% of the hotels have a spa and 93% of the resorts.
- Spas are seen as the "must have" amenity for new and existing accommodation properties. They are viewed as a means of extending guest stays, increasing occupancy in the shoulder seasons, and providing a more unique experience.

Spas Potential for Cape Breton

The development of spa facilities will give Cape Breton's tourism industry more depth and provide visitors with more alternatives. Spas can be used as key components in packages with accommodations and other activities such as whale watching, outdoor adventure and cultural activities.

Cape Breton spa products need to capitalize upon the Island's natural features and/or culture in order to differentiate from the existing marketplace and attract out-of-province visitors. Many of Cape Breton's visitors, especially U.S. visitors, come from areas were there are substantial spa offerings, so anything in Cape Breton would need to offer a very unique experience, likely based on special programming and activities taking advantage of Cape Breton's natural and cultural features.

4 – MARKET ANALYSIS

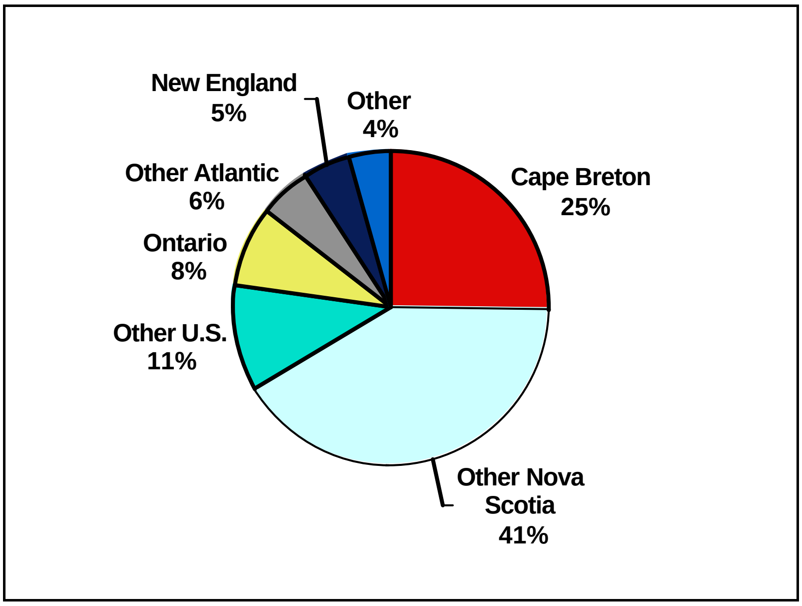
A clear understanding of the existing tourism marketplace for Cape Breton's tourism products and incremental market potential for existing and new or refined products is a critical part of the strategic analysis of this project. Drawing on a range of data sources, we have examined the following aspects of Cape Breton's tourism market:

- Visitation volumes and growth
- Visitor market origins
- Visitor travel patterns
- Key attractions visitation
- Demographics
- Primary trip purposes and visitor activities
- Seasonality patterns
- Types of accommodations used
- Expenditure impacts.

VISITATION VOLUMES AND GROWTH

Approximately one million person-trips take place annually in Cape Breton. The majority of trips overall (two-thirds) are made by Nova Scotians and mainland Nova Scotia is the largest single source of visitors, as shown in Figure 4.1.

Figure 4.1: Overall Origins of Visitors to Cape Breton



Source: Statistics Canada (CTS, ITS), 1999

Over 80% of all visitors to Cape Breton are Canadians. Overall, 69% of all visitors stay one or more nights, meaning that 31% are day visitors only. This suggests a significant opportunity to increase length of stay.

- For Canadians, same-day visitation is higher at 36%, compared to Americans at only 4%, so there is an opportunity to encourage more overnight stays is within Canadian marketplace.

Figure 4.2: Same Day vs. Overnight Visitation to Cape Breton, 1999

Visitors	Canada	U.S.	Total	%
Same Day	317,000	6,500	323,500	31
Overnight	552,000	157,500	709,500	69
Total	**869,000**	**164,000**	**1,033,000**	**100**

Source: Statistics Canada (CTS, ITS), 1999

ORIGIN OF VISITORS

Nova Scotia had the highest growth in Canada for domestic visits in 2001, followed by New Brunswick and PEI. This is based on new data from the 2001 Canadian Travel Survey.

- Only a slight dip in visitation to Nova Scotia as a result of September 11th.
- However, for 2002 to date, Nova Scotia may not be doing as well as some other provinces.

Figure 4.3: Tourism Growth to Nova Scotia and Other Provinces, 1998-2001

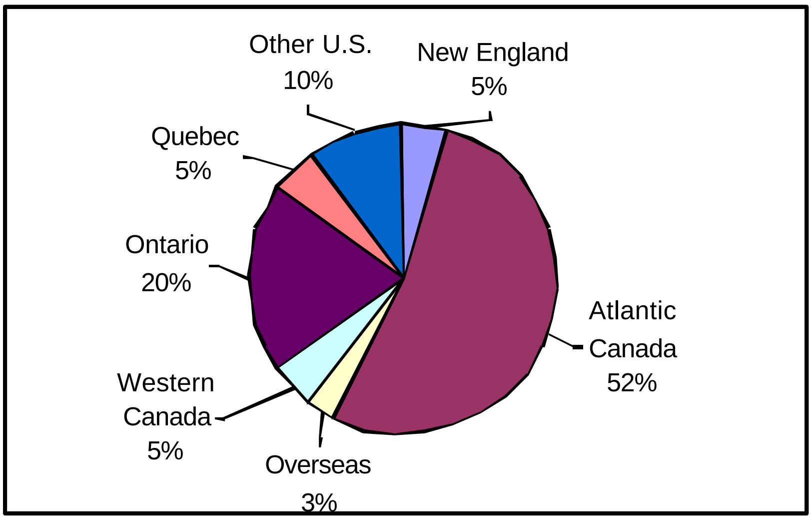
Desitination Region	Total Trips (000)				Growth
	1998	1999	2000	2001	98-01
Nova Scotia	6,328	6,935	7,195	7,079	10.6%
Prince Edward Island	960	978	1,139	994	3.4%
Newfoundland and Labrador	3,511	3,363	3,240	3,199	-9.8%
New Brunswick	5,171	5,513	4,990	5,599	7.6%
Quebec	36,166	37,885	38,031	30,314	-19.3%
Ontario	56,354	58,324	58,440	52,182	-8.0%
Western Canada	52,857	53,300	51,477	46,810	-12.9%
Total Canada	**161,531**	**166,393**	**164,654**	**146,247**	**-10.5%**

Source: Statistics Canada, Canadian Travel Survey, Tourism Statistics Program, 2002

Nova Scotia receives approximately 2.2 million non-resident overnight visitors annually.

- Domestic or intra-provincial travel is higher in terms of total trips, with approximately 5 million overnight person-trips occurring within Nova Scotia annually.
- Over half of the non-resident overnight visitors to Nova Scotia are from Atlantic Canada (52%).

Figure 4.4: Origins of Overnight Visits to Nova Scotia, 2000

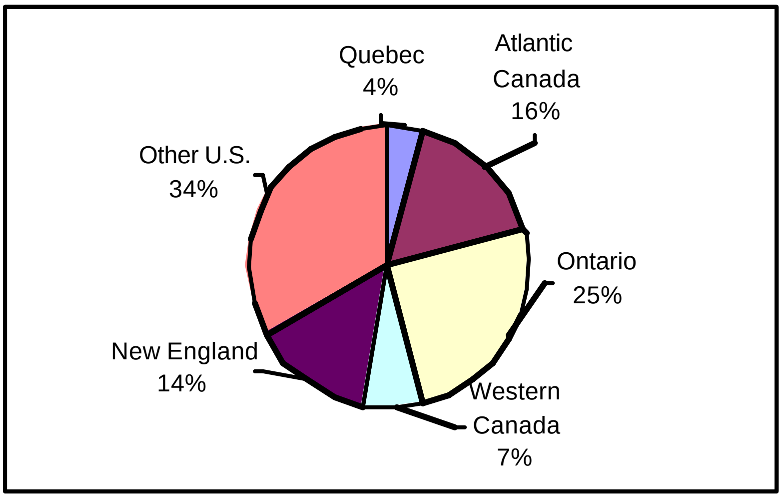


Source: Nova Scotia Department of Tourism and Culture, 2000

Nearly half of all non-resident overnight visitors to Cape Breton are Americans, indicating the importance of this market, as indicated in Figure 4.5. Of the 339,400 non-resident overnight visitors annually, only 15% of these originate from Atlantic Canada.

- Almost half (48%) are from the U.S. and one-quarter from Ontario.
- American visitors tend to spend more per capita than Canadians, so represent a lucrative market.

Figure 4.5: Origins of Non-Resident Overnight Visits to Cape Breton



Source: Statistics Canada

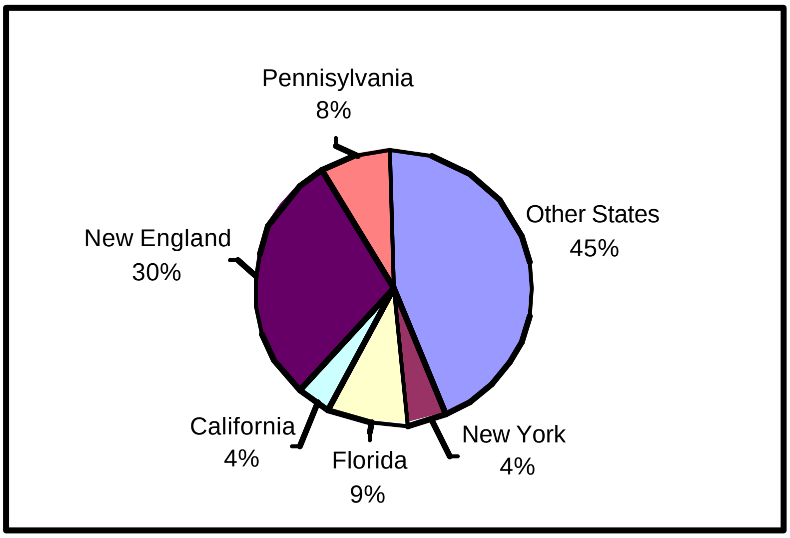
New England, Florida and Pennsylvania are the principal sources of U.S. overnight visits to Cape Breton, as shown in Figure 4.6.

The New England States combined account for 30% of Cape Breton's U.S. visitors.

- Overnight visitors from Florida and Pennsylvania are the highest for individual U.S. States at 9% and 8%, respectively.

The top 10 U.S. states for overnight visitation to Cape Breton account for 60% of all overnight U.S. visits which helps define the key geographic target markets.

Figure 4.6: Origins of U.S. Overnight Visits to Cape Breton



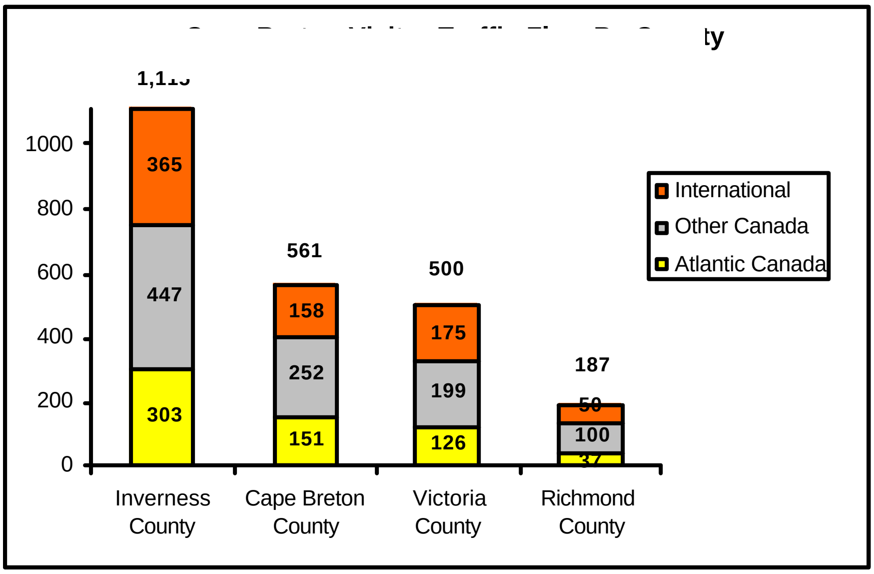
Source: Statistics Canada

VISITOR TRAVEL PATTERNS ON CAPE BRETON

Inverness County has the highest overall visitor traffic flow on Cape Breton Island. This is because of road access via the Canso Causeway at Port Hastings.

Strategic attractions/infrastructure development, signage and marketing/promotion are strategies to consider for broadening the visitor traffic flow throughout the Island.

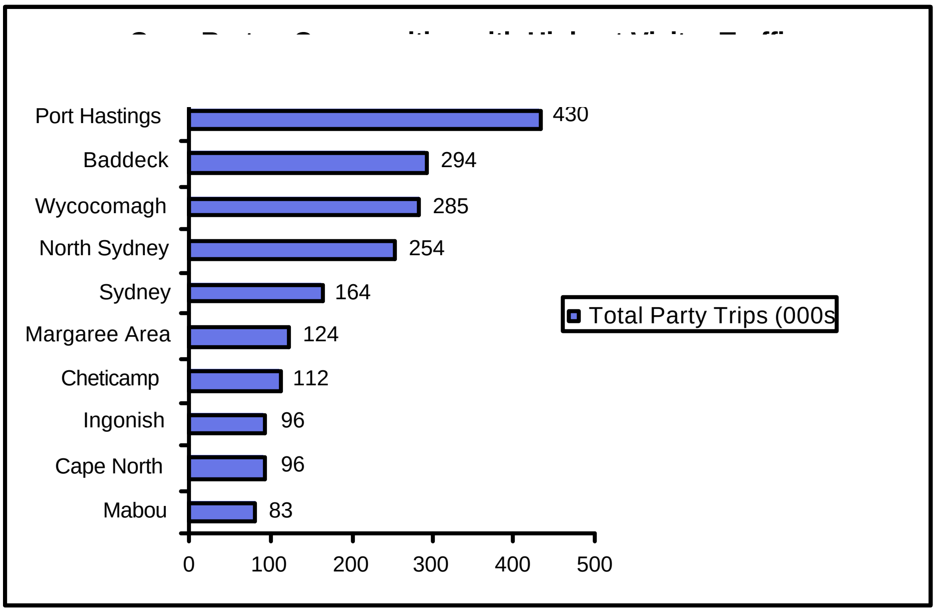
Figure 4.7: Cape Breton Visitor Traffic Flow By County



Source: Corporate Research Associates Inc., 2002

Visitor traffic flow by individual community varies considerably across Cape Breton. Communities with highest visitor traffic flows are Port Hastings, Baddeck, Wycocomagh and North Sydney, as shown in Figure 4.8. A key objective of the "Tourism Road Map" is to prepare strategies to broaden the distribution of visitor traffic flows throughout Cape Breton. This would help to spread economic benefits of tourism more broadly.

Figure 4.8: Cape Breton Communities with Highest Visitor Traffic Flow



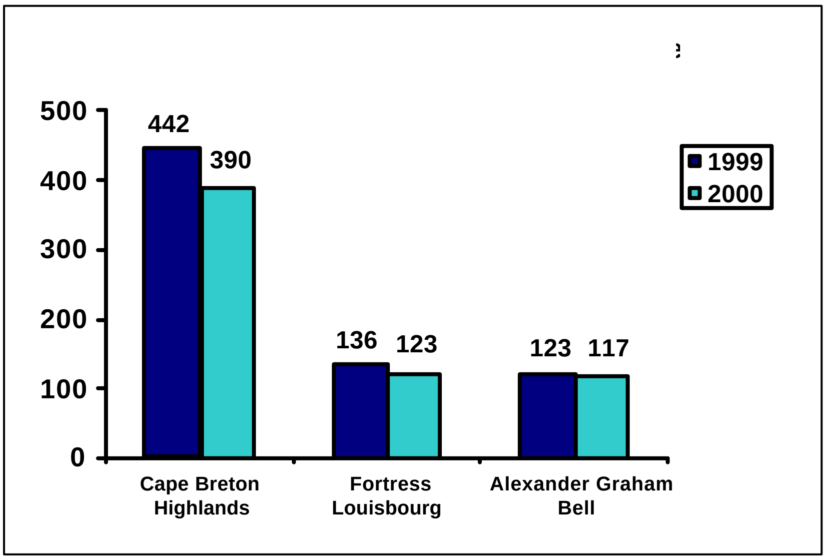
Source: Corporate Research Associates Inc., 2002

KEY ATTRACTIONS VISITATION

Cape Breton's premier attractions draw significant visitation. Cape Breton Highlands National Park has the highest number of visitor days for any of Cape Breton's Parks Canada attractions, as shown in Figure 4.9.

Visitation levels to the largest attractions have not been growing which is a major concern.

Figure 4.9: National Park/Historic Site Attendance (000's)

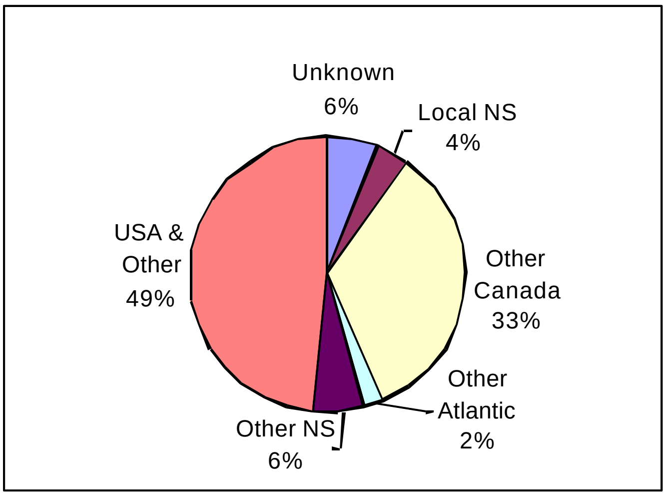


Source:

Cape Breton's Parks Canada attractions, however, draw a very high proportion of U.S. and non-Atlantic Canada visitors. For Cape Breton Highlands National Park, 49% are U.S. or overseas visitors (mostly U.S.), and for Fortress Louisbourg U.S. visitors account for 30% of total visitation.

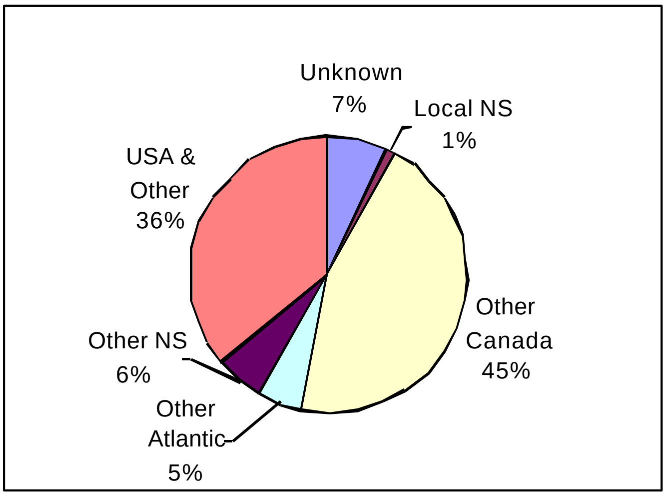
Figure 4.10: Origin of Visitors to Cape Breton Highlands National Park and Fortress Louisbourg

Cape Breton Highlands National Park



Source: Visitor Satisfaction Survey, 1999

Fortress Louisbourg



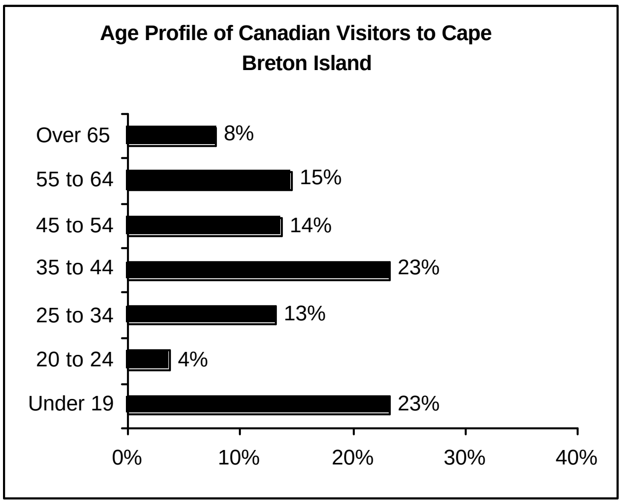
Source: Visitor Satisfaction Survey, 1999

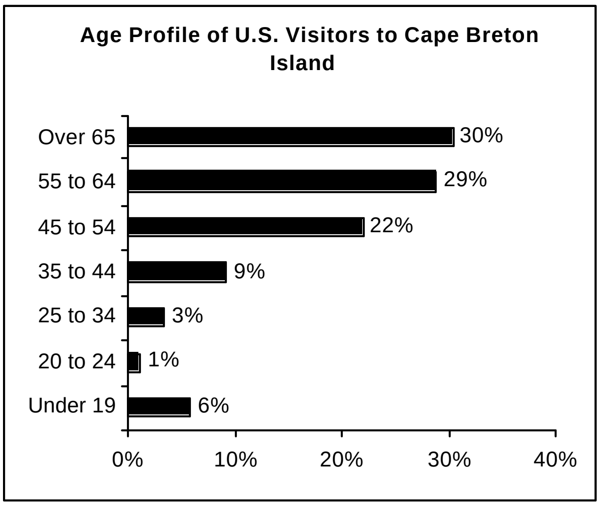
VISITOR DEMOGRAPHICS

The age profile reveals clear differences between Canadian and American visitors (see Figure 4.11).

- U.S. visitors to Cape Breton Island are significantly older than their Canadian counterparts and usually travel as couples.
- Canadian visitors tend to be middle aged and travel with children.

Figure 4.11: Age Profile of Canadian and American Visitors to Cape Breton, 2001

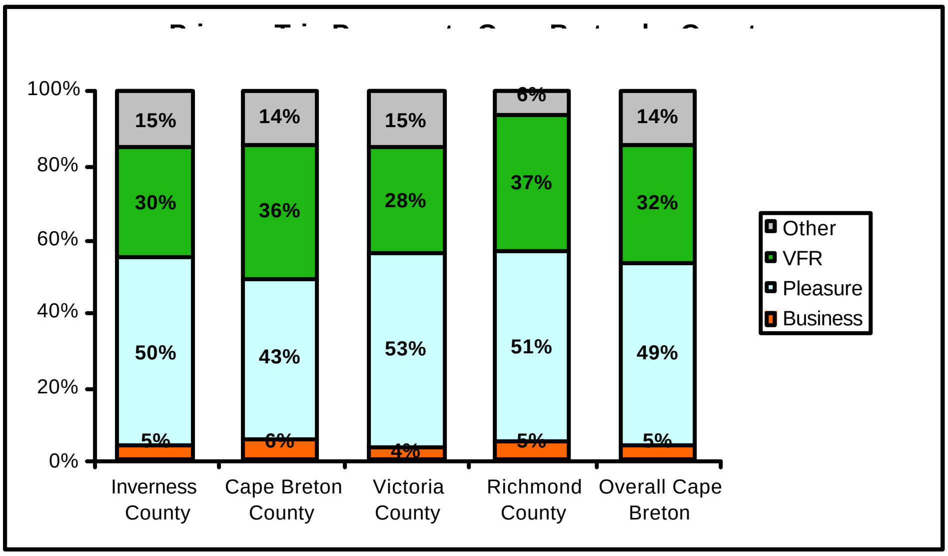




Source: Canadian Travel Survey, 2001

Half of the visitors to Cape Breton Island are pleasure travellers and approximately one-third visit friends and relatives. This ratio varies slightly by County, with Richmond County (see Figure 4.12) having the highest proportion of VFR and Victoria County having the highest proportion of pleasure travellers.

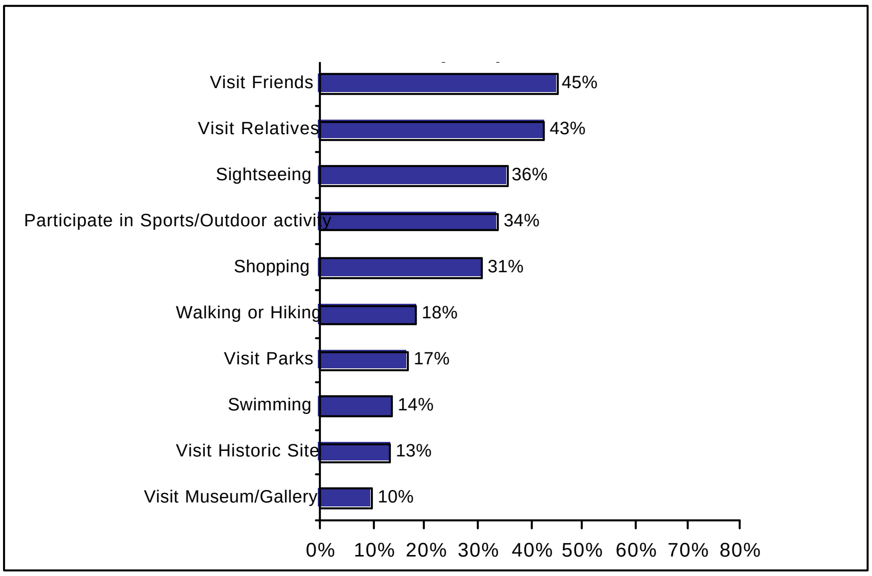
Figure 4.12: Primary Trip Purpose to Cape Breton by County



Source: Corporate Research Associates Inc., Traffic Flow Report 2002

Canadian visitor activities are primarily visiting friends/ relatives, sightseeing and outdoor recreation, as shown in Figure 4.13. Cape Breton has a strong product base for key visitor activities such as sightseeing and outdoor sports and recreation, indicating significant incremental potential.

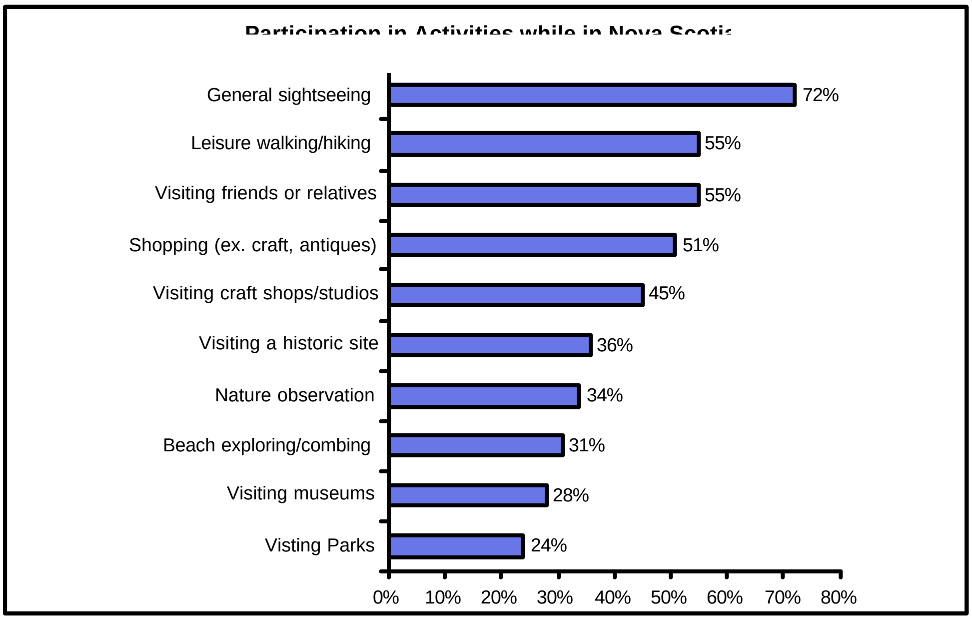
Figure 4.13: Canadian Visitor Activities to Cape Breton, 2001



Source: Canadian Travel Survey, 2001

Visitors to Nova Scotia overall participate in activities that focus on nature, history, culture and general sightseeing, as shown in Figure 4.14. These are all activities in which Cape Breton has an abundance of product, again indicating the potential to draw more visitors to the Island for specific activities.

Figure 4.14: Visitor Participation in Activities While in Nova Scotia



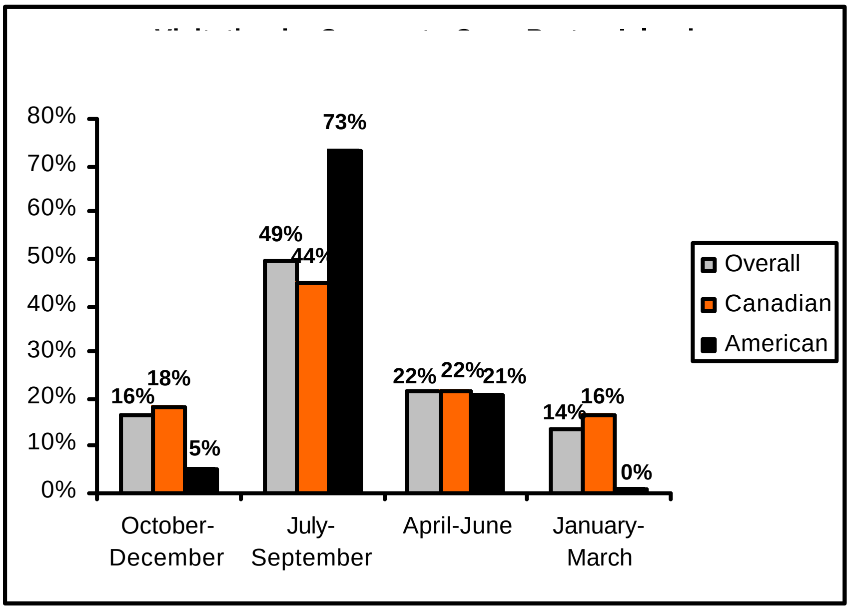
Source: Nova Scotia Department of Tourism and Culture, 2000

SEASONALITY

Visitation to Cape Breton is heavily concentrated in the summer months, indicating a strong seasonal peak with the majority of visitation occurring during a relatively short time period. This means there is a significant opportunity to increase visitor volumes during the shoulder and winter seasons.

- This is particularly evident for the U.S. market where 73% of all visitation occurs in July, August and September.
- Canadians are more willing to visit during the winter months (16% of their visits occur during January, February and March).

Figure 4.15: Visitation by Seasons to Cape Breton Island



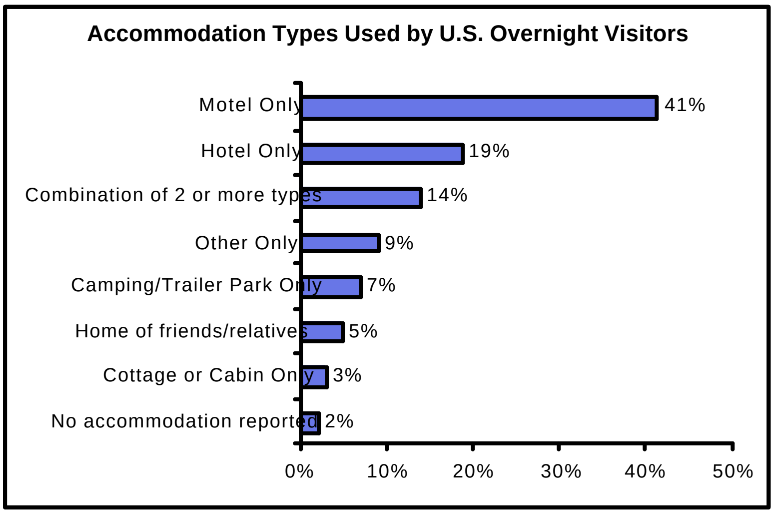
Source: Gardner Pinfold Consulting, 1999

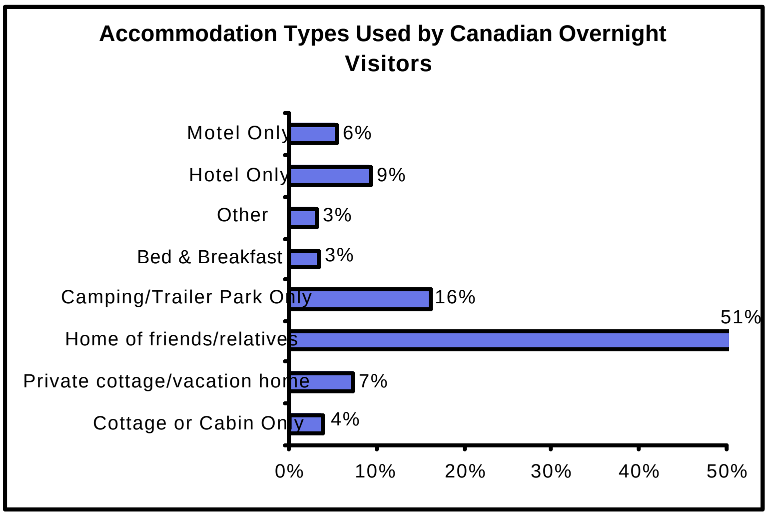
ACCOMMODATION PREFERENCES

The majority of U.S. overnight visitors are staying in commercial roofed accommodations (at least two-thirds), as shown in Figure 4.16. By contrast, over half of the Canadian visitors stay with friends and family, with only approximately 25% in commercial roofed accommodations.

- Therefore, the U.S. market is an appropriate priority target market for commercial accommodation establishments, particularly hotel and motel operators.
- A smaller proportion of the U.S. market are camping (7%) compared to the Canadian market (16%), so Canadians represent a better target market for campground operators.

Figure 4.16: Accommodation Preferences of U.S. and Canadian Visitors to Cape Breton



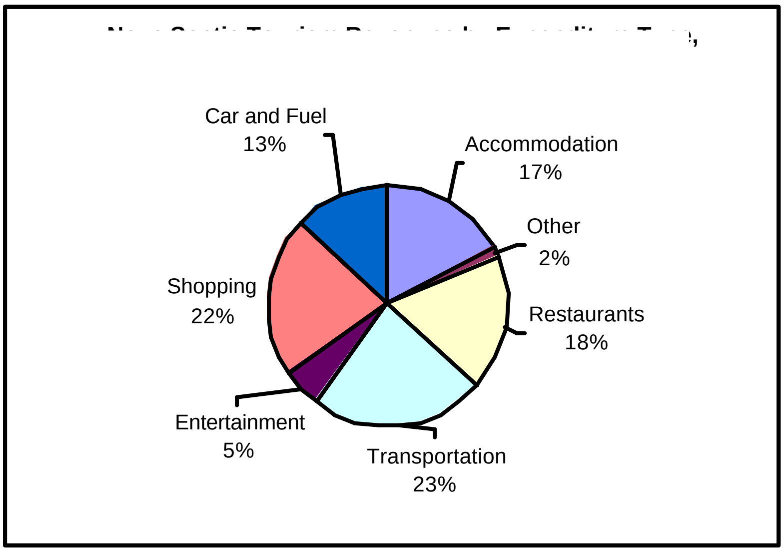


Source: Statistics Canada

ECONOMIC IMPACTS OF TOURISM

The Nova Scotia tourism industry generated $1.22 billion in revenues in 2001. These revenues were widely distributed across a wide range of tourism sub-sectors, as shown in Figure 4.17.

Figure 4.17: Nova Scotia Tourism Revenues by Expenditure Type



Source: Nova Scotia Department of Tourism and Culture, 2001

- Tourism in Nova Scotia supported a total of 33,500 direct and indirect jobs throughout the province.
- Provincial and Municipal taxes generated by tourism accounted for $115 million and federal taxes generated were approximately $83 million.

U.S. and Canadian visitors to Cape Breton spent over $150 million in 1999. The Canadians visitors accounted for almost two-thirds (65%) of this expenditure.

- The top 10 U.S. States for visitor expenditures accounted for over 60% of total U.S. visitor expenditures.

Figure 4.18: Expenditures of U.S. Visitors to Cape Breton by Origin, 1999

U.S. State	Total Expenditure $(000s)	%
Florida	5,743	10.8%
Rhode Island	5,123	9.7%
Pennsylvania	4,730	8.9%
Massachusetts	3,318	6.3%
Maine	3,023	5.7%
California	2,749	5.2%

U.S. State	Total Expenditure $(000s)	%
Maryland	2,314	4.4%
Connecticut	2,306	4.4%
New Jersey	2,192	4.1%
Arizona	1,910	3.6%
Other U.S. States	19,602	37.0%
New England States	15,460	29.2%
Total	**$53,010**	**100.0%**

Source: Statistics Canada, 1999.

- Total expenditures as of 2001 were $230 million.

IMPLICATIONS OF MARKET ANALYSIS

There are several implications of this market analysis for developing Cape Breton's tourism sector, including the following:

- The U.S. market is a key opportunity and should be strongly targeted:
  - New England States, Mid-Atlantic and Florida should be key targets.
  - Ontario continues to be primary non-resident Canadian target market.
  - Canadian and U.S. visitors have distinctly different demographics, which needs to be taken into consideration for product development and marketing.
- There is a need for strategies to strengthen the shoulder season draw, as seasonality is a severe problem affecting the viability of Cape Breton's tourist operators – particularly the U.S. visitors who come primarily in summer, even though their demographics (older, travelling as couples) indicates flexibility to visit in the shoulder season.
- The domestic market is best opportunity for off season business in the winter:
  - Getaway packages, winter sports packages, sports events and meetings/conventions are the best winter opportunities.
- The lack of visitor growth overall and to major attractions is a concern and requires strategic attractions development and marketing/promotion:
  - Rejuvenation/enhancement of key products/attractions is essential to strengthen draw, along with stronger marketing/promotion and packaging.

- Visitor traffic flow across the Island needs to be distributed more broadly. This can be achieved through strategic attractions development at key locations, combined with enhanced signage, touring route development and improvements to road infrastructure
- Cape Breton's product offerings and product potential are well-suited to visitor interests in key target markets (history, culture, nature, sightseeing).
  - There is a need for more products and packages to better tap the market potential, along with stronger marketing/promotion.

SUPPLEMENTAL PRIMARY MARKET RESEARCH

We interviewed a wide range of tour operators from all over North America to gain a better sense of their products and markets. A key purpose of this research is to better understand the current markets and product needs of these market segments in order to gear product development initiatives accordingly.

A representative selection of three different categories of tour operators were interviewed, as follows:

- U.S. motorcoach tour operators
- Canadian motorcoach tour operators
- Specialty nature and adventure tour operators

We also interviewed several cruise lines that operate along the Eastern Seaboard and into Atlantic Canada. For each of the different tour operator groups and the cruise lines, we examined the following:

- Product range and characteristics
- Markets
- Cape Breton itineraries

Trends in Motorcoach Tours to Cape Breton

The U.S. and Canadian motorcoach tours market segment offers general interest sightseeing tour products. These operators specialize in all-inclusive group sightseeing tours, although some do offer a customized service, while others have a smaller FIT business.

- The majority of operators have multiple departures all over North America, and many of the larger operators (e.g. Globus, Tauck and

Collette) have itineraries in a number of other countries with European destinations being the most popular.

- Tours range in length from 2-3 day tours of nearby cities, states and attractions to long haul tours of 8 to 16 days which typically travel outside home province or state. A number of the operators interviewed also conduct local day tours.
- Most tours originate by motorcoach, driving from the home state/province to Atlantic Canada. A smaller percentage fly to Atlantic Canada, starting in Halifax or St. John's, or fly into New York or Boston from elsewhere in the U.S. and start there by motorcoach.

Generally the tours focus on visiting the main attractions of Cape Breton with the Alexander Graham Bell Museum, the Cabot Trail and Fortress Louisbourg being the most commonly featured attractions on motorcoach tour itineraries. North American motorcoach tours cater almost exclusively to the mature travellers market (mostly seniors) and origins of tour operators' clients are widespread throughout the U.S. and Canada:

- Motorcoach tour operators primarily draw their clients from their own state/province (ON, AB, RI, TX, CA, FL, MI, MASS, PA, CONN, NY, NH), although many do attract significant clientele from surrounding states/provinces.
- Southern New England-based operators (e.g. Tauck in Connecticut) tend to draw heavily from the huge New York market area.
- Some of the larger companies have a significant clientele spread across North America, focused on the main urban areas, which they reach through a network of travel agents.
- New England and Mid-Atlantic states provide a strong client base for eastern seaboard operators.

The vast majority of motorcoach tour operators cater almost exclusively to the seniors market - generally retirees in their 60s and 70s. Some have a slightly younger demographic of 50 plus, but it is generally the older clients who travel on the Atlantic Canada itineraries.

Bank-sponsored travel groups is an emerging market segment that a number of motorcoach tour operators are actively pursuing. This market segment seems to be most concentrated in the Midwest and Southern States, particularly Tennessee, Missouri and Oklahoma.

Motorcoach Tour Itineraries

Cape Breton Island is an important component of Atlantic Canada itineraries for U.S. and Canadian motorcoach tour companies, and is included by almost all operators in at least one of their Atlantic Canada itineraries.

- Generally Cape Breton is part of a larger Nova Scotia tour visiting several parts of the province, or an Atlantic Canada tour that also includes PEI, New Brunswick and Newfoundland.
- Some U.S operators also include New England and Mid-Atlantic States such as Maine, Massachusetts and often New York in their itineraries, particularly those that travel by motorcoach from their points of origin.
- Sydney and Baddeck are the most prevalent overnight stops on Cape Breton used by these tour operators, because of their location relative to key attractions and availability of suitable accommodations.
- Seasonality is still an issue with operators in the fall (particularly in October), as it can be difficult to book accommodations (not all facilities are open) and many attractions are operating limited services or closed. Motorcoach tours fly into Nova Scotia from market origins, as well as driving directly from New England and Ontario.
- For those operators who do not currently visit Cape Breton, timing is the key reason for not including it within their itineraries as many of the tours already have a lengthy schedule.

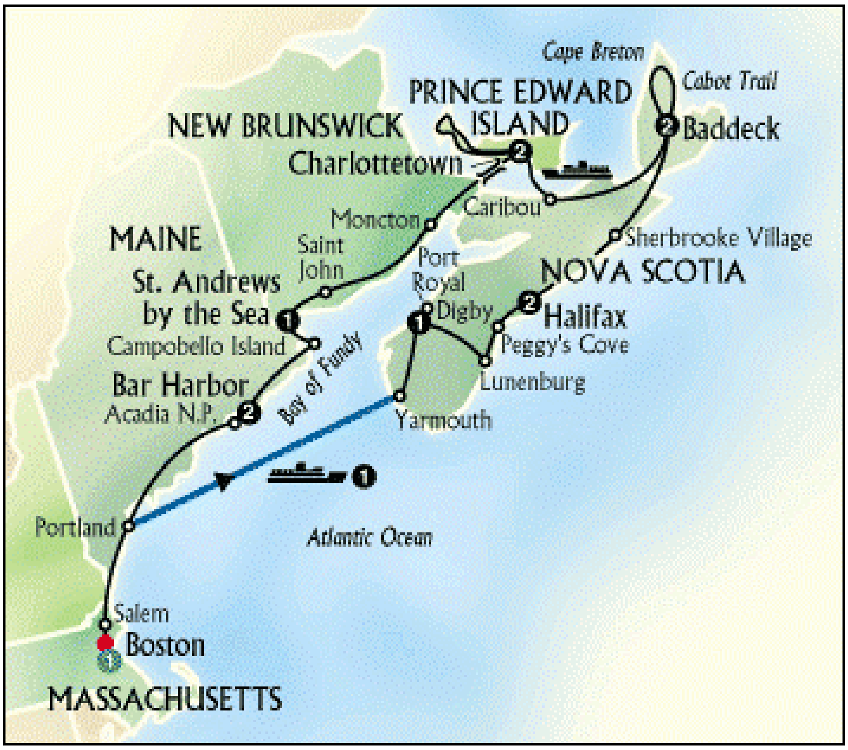
Some operators only go to Cape Breton/Nova Scotia periodically, often only once every two to three years, although these operators tend to focus on destinations in the U.S. rather than Canada. Some itinerary examples are shown below:

Figure 4.19: Sample Motorcoach Atlantic Canada itineraries

Itinerary	Tour	Start	Overnights Enroute	Finish
Fly in Halifax	9 days	Halifax	Halifax-Liscomb Mills-Ingonish-Sydney-2xCharlottetown-2xDigby	Halifax
Maritime Explorer	13 days	Boston	Boston-Scotia Prince-Digby-2xHalifax-2xBaddeck-2xCharlottetown-St. Andrews-2xBar Harbor	Boston
Maritime Discovery	15 days	Ottawa	Ottawa-Quebec City-Grand Falls-2xCharlottetown-Baddeck-Sydney-3xHalifax-Saint John-Waterville-Lake Placid- Niagara Falls-Toronto	Toronto
Naturally the Maritimes	14 days	Ottawa	Ottawa-Quebec City-Campbellton-Miramichi-2xSummerside-2xHalifax- St. Andrews- Fredericton-Edmundston- Montreal	Ottawa

Motorcoach itineraries within Atlantic Canada regularly include Halifax, but sometimes omit Cape Breton to save time (see Figure 4.20).

Figure 4.20: Sample Maps of Atlantic Canada Motorcoach Tours



The larger U.S. tour operators regularly include Cape Breton in their Atlantic Canada itineraries, and PEI is also very popular.

Atlantic Canada Cruise Industry Trends

A wide range of cruise itineraries are offered by an increasing number of ships along the Eastern Seaboard of North America. All-inclusive cruises vary in length from shorter 4/5 day cruises out of New York to the traditional 7/8 days. There are also some longer transatlantic and Central Canada (e.g. Boston to Montreal) cruises (10 days or more).

Different experiences are offered depending on the size of the vessel, which generally group into three categories:

- Small adventure ships carrying 100-130 passengers, medium-sized ships with 700-800 and larger ships with 1,000-2,000 passengers.

Small ship cruise lines typically offer a more specialized product with a stronger focus on natural and cultural features of the region with cruise itineraries of longer duration (e.g. 8 days plus).

Shore excursions are generally not included in the overall cruise package price, except for the small ship cruise lines, which usually include all shore-based activities as they are often form integral components of their itineraries.

- Typically half of the passengers participate in shore excursions offered by cruise lines.
- A small proportion do not disembark (10-15%)
- The remainder wander on their own, shop, or purchase a sightseeing tour or excursion offered by local tourist operators.

Passengers on cruise vacations range from families and young couples to the traditional seniors market. The majority of the Eastern Seaboard cruise itineraries are based in New England and Mid-Atlantic ports.

- Primarily New York and Boston
- However, the majority of the cruise lines draw their passengers from all over North America, through tour operator and travel agent bookings.

Significant potential now exists to expand in the European cruise market as Fred Olsen Cruises has begun operating an Atlantic Canada itinerary in 2002.

Demographics for cruisers vary depending on the cruise line.

- Carnival Cruises (the fun ships) have a younger clientele, generally aged 25 to 50 years.
- Holland America have an older customer base in the 45 to 65 age range, but they also have a family program.
- Adventure Canada, Fred Olsen and Clipper Cruises all generally cater to the mature travellers market – 50 years and over.

Atlantic Canada Cruise Ship Itineraries

Sydney, which is the main Cape Breton port-of-call, is often included in the longer cruise itineraries. Cape Breton is one of many ports-of-call in Atlantic Canada for cruise lines and is included by most companies on at least one itinerary.

- Carnival Cruises uses Cape Breton only on its longer voyages which bring approximately 18,000 passengers to Sydney annually.
- Cruise lines tend to favour the cities of Halifax and St John's, Newfoundland, as principal ports-of-call for Atlantic Canada.

- Cruise lines include attractions such as Sydney walking tours, Fortress Louisbourg and the Alexander Graham Bell Museum as optional shore excursions.

There are opportunities to develop and offer unique products as shore excursions focusing on cultural experiences, local entertainment, and adventure/ecotourism excursions.

- Generally a wide variety of options are provided for passengers.
- As cruises include all meals, potential restaurant/food service business is limited.
- Cruise ship passengers will frequently buy local handicrafts and souvenirs, particularly those which are unique and of high quality.

Eastern Seaboard cruises include Cape Breton to a limited extent. Many of the cruises from Europe and Central Canada use ports within Atlantic Canada and tend to prefer Halifax and St John's. The French colony of St. Pierre et Miquelon is popular as a foreign/exotic destination located within the eastern seaboard region.

Figure 4.21: Atlantic Canada Cruise Ship Ports-of-Call

Itinerary	Tour	Start	Atlantic Canada Ports-of-Call	Finish
Atlantic Canada (small adventure cruise ship)	10 days	St. John's	St. John's - Trinity- St. Anthony- Battle Harbour & Red Bay -Bonne Bay- Ramea/Francois- St.-Pierre et Miquelon- Louisbourg - La Have Bank/Lunenburg-Halifax	Halifax
Eastern Seaboard	13 days	Montreal	Montreal-Quebec City-Sydney-Halifax-Saint John's- S.Carolina-2xFlorida-Bahamas-London	London
Canada	4 day	New York	Halifax	New York
Canada	7 day	New York	Boston-Portland-Sydney-Halifax	New York

Specialty Tour Operators

Specialty nature and adventure tour operators offer activity specific products that focus on natural and cultural resources. The adventure/nature operators offer a wide range of specific products that feature wildlife viewing, birding and adventure activities such as sea kayaking and bicycle touring. The focus for many of these operators is the adventure activity and related experience

- The operators enhance this by having qualified guides and interpretative programs that allow their clients to learn about flora, fauna and local history and culture.
- Most of the specialty nature/adventure tour operators have tours in numerous countries that are timed seasonally to experience wildlife and natural features at their peak.
- Many operators specialize in destinations where infrastructure and language barriers can make individual travel difficult, which is sometimes part of the appeal.
- These specialty tours are typically a minimum of 6 days and up to 14 days in length.
- Group sizes are small - generally less than 15 people – and they frequently utilize smaller, more intimate accommodation facilities.

The market is predominately American and the type of client varies depending on the experience offered. The client base, because of the international itineraries of these tour operators, can reside anywhere in the world.

- However, the majority are based in North America, and concentrated in the main population concentrations such as New York, California, Florida and Texas.
- The primary European markets for the adventure tour operators are the U.K. and Germany, although the European market is a relatively small component overall.

The age of clients on adventure/nature tours varies depending on the type of tour and the degree of physical activity.

- Generally nature and history tours are dominated by travellers in their 60s and 70s, of which the majority tend to be women.
- The more adventurous itineraries have a lower age demographic dominated by travellers in their 30s through to 50s, which are generally couples and singles.

The market is affluent and well-educated and the per diem costs of these trips can be significantly higher than for motorcoach tours. Cape Breton is included on specific nature/adventure tour itineraries because of its unique flora and fauna.

- For these tour operators Cape Breton is one of many itineraries and generally a destination they have used for a number of years (e.g. Victor Emmanuel Nature Tours).
- Cape Breton is usually included as part of a larger Atlantic Canada experience that incorporates mainland Nova Scotia and sometimes one other Atlantic province – Prince Edward Island, Newfoundland or New Brunswick.
- Some operators specialize in itineraries that include only Cape Breton Island.

The nature/adventure tour operators utilize a wide range of accommodations on Cape Breton, depending on the type of experience being offered. Operators also utilize a number of the local businesses for guiding and activities such as sea kayaking, hiking, fly fishing and whale watching.

- Adventure and nature tour operators tend to have one tour annually to Cape Breton usually combining it with Newfoundland
- Most adventure and nature tours to Atlantic Canada generally fly directly into either Halifax or St John's from their home state/province.
- These itineraries focus on viewing wildlife and participating in specific adventure/ecotourism activities that are generally located in the northwest portion of the Cape Breton.

Figure 4.22: Nature-Adventure Tour Operators Atlantic Canada Itineraries

Itinerary	Tour	Start	Overnights on route	Finish
Autumn Adventure	7 days	Halifax	2xHalifax- Liscomb Mills-3xDingwall	Halifax
Newfoundland & Nova Scotia	11 days	St. John's	2xSt. John's- 2xPlacentia- 3xNorth Sydney-2xLiscomb Mills-Halifax	Halifax
Newfoundland & Nova Scotia	11 days	Halifax	Halifax-Liscombe Mills-2xChéticamp-North Sydney-2xDunville-3x St John's	St John's

Tour Packages and Cruises Price Trends

Package pricing varies by tour operator, with motorcoach travel being cheapest and small ship cruises the most expensive per diem.

- Motorcoach tours typically start from approximately $110 per person per day, although frequently not all meals and attractions are included.
- Specialized all-inclusive tours average US$250 per person per day and generally include all meals, accommodations and activities.

- Cruises range in pricing and generally have their shore excursions as extras.

Figure 4.22: Tour Packages and Cruises Per Diem Price Levels

Type of Operator or Cruise	Itinerary Length and Origin Point	Average price per person per day	Included in Pricing
Small Ship Cruise	10 days – Atlantic Canada	US$375	▪ Accommodation ▪ Shore excursions ▪ Meals
Medium-size Ship Cruise	13 days Transatlantic	£143 (Cd$321)	▪ Accommodation ▪ Meals
Large Ship	7 days (New York)	US$100	▪ Accommodation ▪ Meals
Motorcoach	11 days (from Toronto)	Cd$127	▪ Accommodation ▪ Most Meals ▪ Attractions
Motorcoach	7 days (from Portland)	US$114	▪ Accommodation ▪ Most Meals ▪ Attractions
Motorcoach	8 days (from Halifax)	US$141	▪ Accommodation ▪ Most Meals ▪ Attractions
Nature Tours	10 days (from Halifax)	US$255	▪ Accommodation ▪ All Meals ▪ Attractions/Guide

Conclusions of Supplemental Market Research

Several key observations and conclusions emerge from this supplemental primary market research. Several general observations can be made, as follows:

- Some tour operators feel their clients are not aware of Cape Breton as a destination, which can make it difficult to sell, so there is a need for stronger destination marketing
- Many tour operators do not believe Cape Breton is a stand-alone destination and it has to be packaged with other Atlantic Canada cities.

- Many other great products and attractions are being developed in Atlantic Canada (e.g. the Fundy Trail and Interpretation Centre in New Brunswick are competition for the Cabot Trail).

Tour operators offered their views on accommodation quality and availability, which support the findings of the accommodations analysis presented earlier in this report:

- Overall, the accommodations used are considered good, especially in Baddeck and Sydney which both offer a number of 3 to 4-star accommodation establishments.
- Lack of quality accommodation in certain areas of Cape Breton (e.g. St. Peters) can restrict more extensive touring routes. The majority of tour operators are primarily looking for 3-star to 4-star quality of accommodations wherever they travel, regardless of whether they are hotels, motels, resorts or inns.
- Accommodation availability is an issue for some operators, particularly in the fall, since many are busy until the end of October.
- One tour operator believes there is an opportunity for a five-star accommodation facility on the Cabot trail – one which is locally owned and unique.

Tour operators provided important feedback on attractions/activities and other services/facilities. Several key points made regarding attractions/activities:

- The Salmon Museum – a great attraction but it is inadequately signed (and the sign itself is of low quality) and not advertised/promoted enough.
- Parks Visitor Centre north of Chéticamp – some officials in interpretive centre apparently did not have a good knowledge of unique local bird species, especially the Bicknell's thrush (specific comment from one tour operator).
- Fortress Louisbourg – some operators concerned about visiting later in the season when the costumed animators are no longer available to enhance the experience.
- Gaelic College – felt there is too much emphasis on the gift shop (first thing you see) and not enough on the tour, which could be enhanced. Often no bagpipe player when tours arrive (which is a highlight for most groups).
- Limited retail hours in some smaller communities and lack of Sunday shopping.

- Many clients interested in fishing but information on obtaining a guide, even in Margaree, is apparently difficult to find (unless you go to the Salmon museum).

Some issues were raised regarding other services and facilities, as follows:

- Washrooms – motorcoaches, especially those with older groups on board, tend to stop every 1 to 1.5 hours for passengers and there are some areas where washrooms are lacking.
- No quality lunch stop available in the Canso Causeway/Port Hastings area that caters to bus tours.
- Cheaper Sydney to Newfoundland air services might better enable a combination tours and more options for including Cape Breton in Atlantic Canada itineraries.

5 – NATURAL RESOURCES TOURISM POTENTIAL

We examined the natural resources with tourism potential on Cape Breton Island under several categories:

- Landscapes, scenery and natural features
- Backcountry trails
- Marine features, lakes, rivers
- Freshwater and saltwater fishing resources
- Wildlife habitats and unique flora and fauna.

The focus was on identifying resources that would contribute to great adventure/ecotourism experiences, which have three key attributes:

- Variety of experiences – this is complemented by diversity of landscapes
- Quality of the natural environment
- Access to the natural environment.

Cape Breton has a great diversity of landscapes and features that range from sandy beaches to highland bogs. There are a tremendous array of natural resources that offer tourists and residents the opportunity to experience the region's geological, biological and botanical diversity, ranging from mountains and plateaus in the highlands to rolling hills, valleys and pastures in the lowlands.

- The Cape Breton landscape is dotted with a myriad of rivers and lakes, as well as its own inland sea – the Bras d'Or Lakes – which offers 225 km of shoreline, crystal clear waters and natural habitats for numerous birds, plants and other animals.
- Much of the land base is already used for recreation and tourism, with areas such as Cape Breton Highlands National Park, Louisbourg National Historic Site, provincial parks and wilderness areas set aside for visitors and residents to use. Specific features of note include:
    - The sandy beaches of the Ceilidh Trail and Northeast Highlands
    - Broad Cove Road – sea cliffs above the surf
    - Mabou Highlands
    - The famous Cabot Trail with it's rocky northern shores and ocean vistas
    - The mountainous plateaus of the Cape Breton Highlands

- The wilderness woodlands, tundra and bogs of the Cape Breton Highlands National Park
- The spectacular fall colours (fiery reds, oranges, crimsons and gold) of the Cabot Trail.

PROVINCIAL PARKS

Provincial Parks are a key component of the natural resources infrastructure. Individual parks provide some degree of infrastructure that enables visitors to experience the natural environment. Cape Breton contains three of Nova Scotia's 22 provincial campgrounds and 20 of its 105 day-use sites.

- ♦ Many of Cape Breton's provincial park sites provide access to beaches, which enable visitors to enjoy some of the warmest waters in the northeast of North America.

Figure 5.1: Cape Breton's Provincial Campgrounds

Campground	County	# of sites	Size (hectares)
Battery	Richmond	53	60
Mira River	Cape Breton	141	86
Whycocomagh	Victoria	61	205
Totals		**255**	**351**

Source: Nova Scotia Department of Natural Resources

In addition, Two Rivers Wildlife Park, on the scenic Mira River, has significant potential for camping and outdoor recreation, in addition to the unique wildlife-viewing opportunity.

National Park

Cape Breton Highlands National Park covers a large portion of Northern Cape Breton. Stretching from the west to the east coast the park encompasses a total of 95,000 ha. The Park's natural resources offer visitors a wide range of activities in a scenic setting including:

- ♦ Numerous wildlife-viewing opportunities, such as moose viewing at Benjies Lake
- ♦ Bird-watching for songbirds, such as the Bicknell's Thrush, as well as bald eagles and sea birds

- There are over 25 hiking trails in the Park many with interpretative facilities – these trails range from 1 km to 16 km in length; two of these are wheelchair accessible and six have interpretative panels.
- Swimming at Ingonish, which has two superb beaches
- Other swimming areas include: North Bay, Black Brook and Warren Lake on the east side and La Bloc on the west
- Fishing for trout and salmon
- Searching for orchids in the Bog lands
- Deep-sea fishing and whale-watching excursions from nearby communities.
- In the winter there is cross-country skiing on groomed and ungroomed trails, plus tobogganing on the 5th fairway of the Highlands Golf Links.

There are extensive camping facilities within Cape Breton Highlands National Park, as shown in Figure 5.2. There is also group camping at Marrach and Robert Brook and Wilderness Camping at Fishing Cove.

Figure 5.2: Cape Breton Highlands National Park Campground Facilities

Campground	Unserviced Sites	Serviced Sites	Facilities
Cheticamp	125	13 electrical sites & 24 with 3-way hook ups	Showers, kitchen shelters with woodstoves, outdoor theatre, playgrounds
Corney Brook	20	n/a	Fireplace, playground, swimming
MacIntosh Brook	10	n/a	Playground.
Big Intervale	10	n/a	Pit privies, fireplaces
Broad Cove	173	83 with 3-way hook ups	Showers, group fireplaces, playgrounds, swimming, outdoor theatre.
Ingonish	90	n/a	Showers, kitchen shelters with wood stoves, playground.
TOTAL	**428**	**120**	

Source: Parks Canada

Wilderness Areas

In addition to the provincial and national parks there are 11 designated wilderness areas on Cape Breton Island. While the degree of infrastructure in most of these areas is limited, there are substantial opportunities for trails development and other services, where appropriate, on a site-by-site basis.

Figure 5.3: Cape Breton's Wilderness Areas

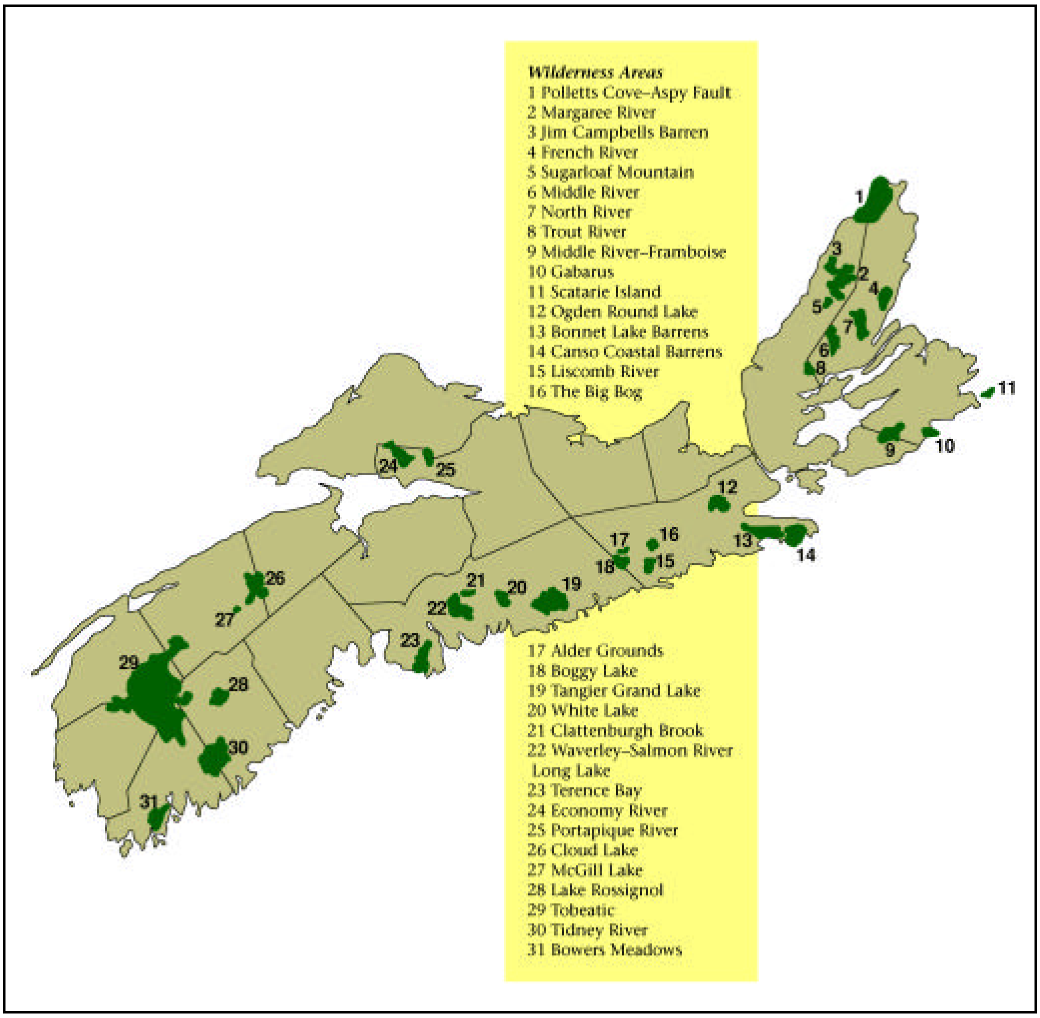
Wilderness Area	**Location** (County)	**Size** (ha)	**Key Tourism Potential**
Polletts Cove – Aspy Fault	Inverness/Victoria	27,230	Wildlife viewing, hiking
Margaree River	Inverness	6,850	Hiking
Jim Campbells Barren	Inverness	1,750	Wetlands Interpretation
French River	Victoria	7,100	Hiking
Sugarloaf Mountain	Inverness	750	Hiking
Middle River	Victoria	5,620	Hiking and camping
North River	Victoria	3,990	Hiking
Trout River	Inverness	2,880	Trout fishing
Middle River - Framboise	Richmond/Cape Breton	5,640	Fly fishing
Gabarus	Cape Breton	3,745	Birding, paddling, sport fishing and hiking
Scatarie Island	Cape Breton	1,500	Sea kayaking, birding, hiking
Total		**67,055**	

Source: Nova Scotia Department of Environment and Labour

The Polletts Cove-Aspy Fault Wilderness area makes up over one-third (41%) of the total wilderness area on Cape Breton and has excellent tourism potential.

The remaining wilderness areas are relatively small, ranging from 1,000-5,000 hectares. Most of the wilderness areas are located in the northern portion of Cape Breton, as shown in the map of Figure 5.4.

Figure 5.4: Map of Wilderness Areas



Source: Nova Scotia Department of Environment and Labour

TRAILS SYSTEMS

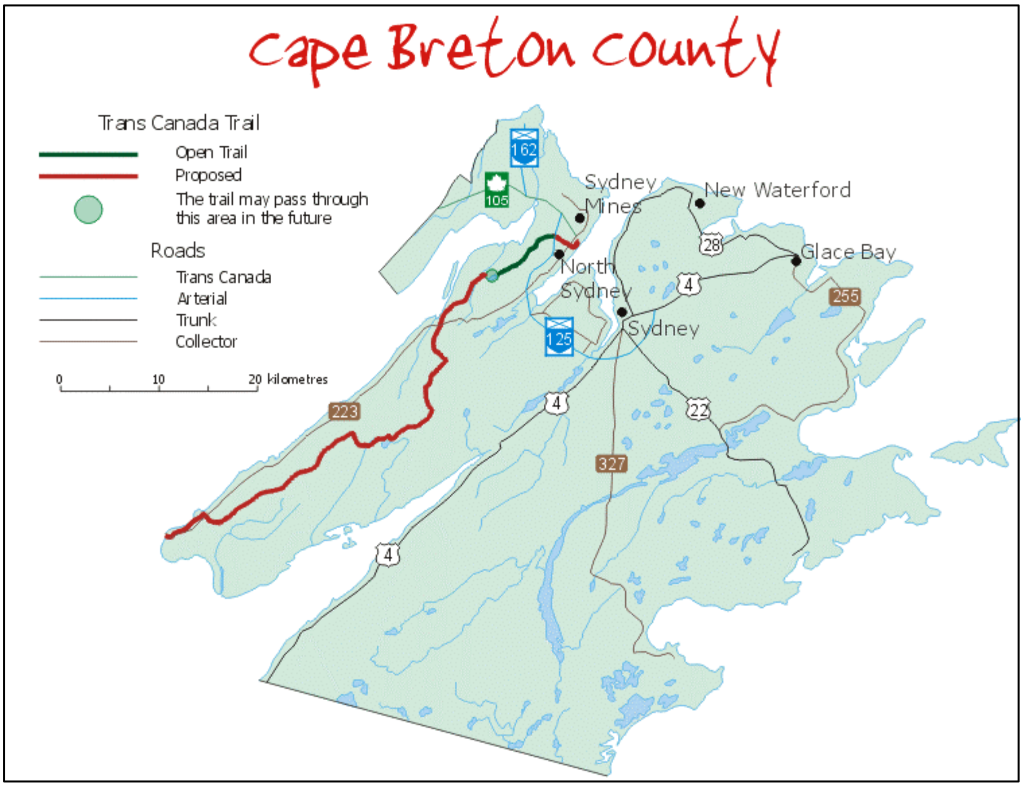
In addition to trails networks in National and Provincial Parks and Wilderness Areas, there are a number of other trails systems. These include logging and secondary roads that provide excellent opportunities for adventure/ ecotourism. The Highlands region contains approximately 730 kilometres of backroads that offer excellent potential for exploration.

- The province-wide organization "Trails Nova Scotia" has made substantial progress in mapping many of these trails to assist users in maximizing the recreational potential.

The Trans Canada Trail on Cape Breton Island provides recreational and tourism opportunities for a variety of users. However, the majority of the trail is accessible to motorized transport and in many cases maintained by local ATV and snowmobile clubs. This likely makes these trails somewhat less appealing to non-motorized users such as hikers and bikers. The issues related to multi-use are of major concern.

The following map (Figure 5.5) illustrates a Trans Canada trail segment within Cape Breton County. The trail in most other areas of the Island is still under construction.

Figure 5.5: Trans-Canada Trail Route Within Cape Breton County

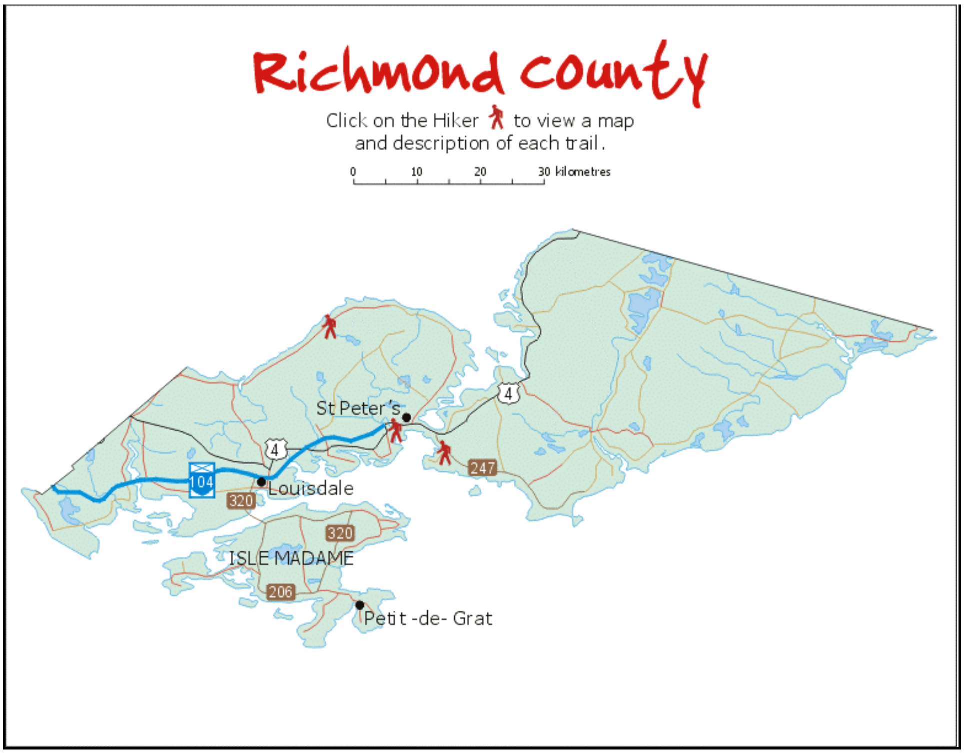


Source: Trails Nova Scotia

There are numerous other trails throughout Cape Breton that provide recreational and tourism opportunities to residents and visitors alike. The trails cover a mix of private and Crown lands (provincial, regional and local).

The map in Figure 5.6 illustrates the hiking trails in Richmond County with the hiker symbols highlighting the specific location of trails.

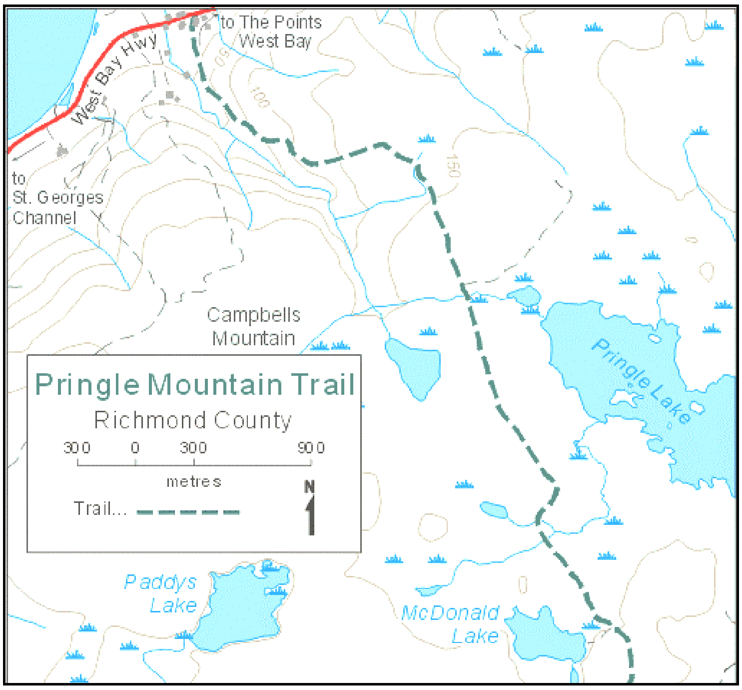
Figure 5.6: Hiking Trails in Richmond County



Source: Trails Nova Scotia

The map in Figure 5.7 provides the next level of detail for a particular trail in Richmond County. This 14 km trail is on Crown land on the shores of the Bras d'Or Lake.

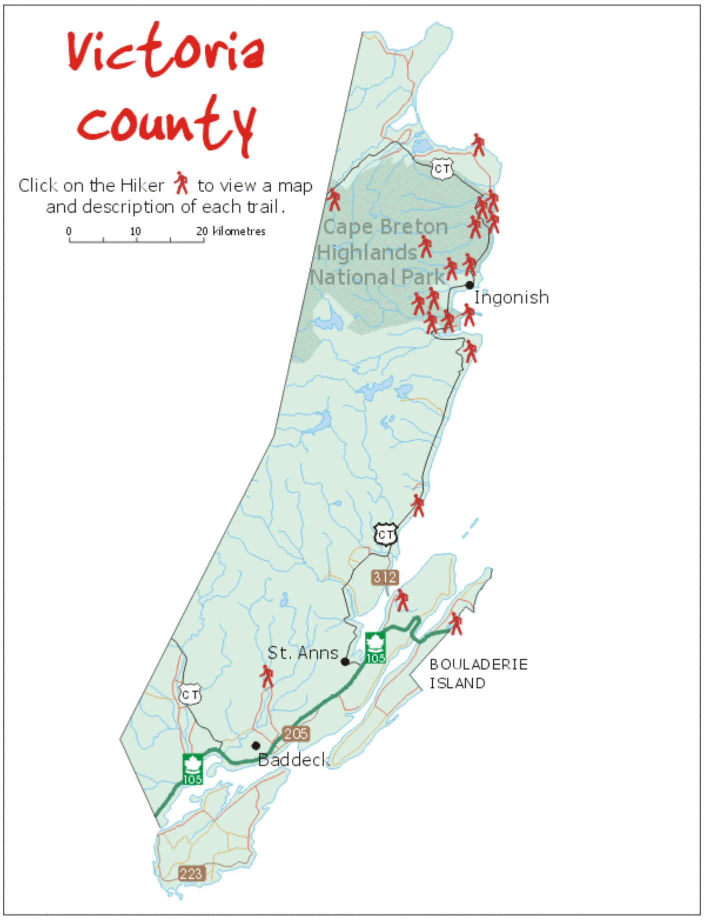
Figure 5.7: Detail Map of Pringle Mountain Trail



Source: Trails Nova Scotia

Victoria County also has a number of hiking trails which are illustrated in Figure 5.8, including trails located in Cape Breton Highlands National Park.

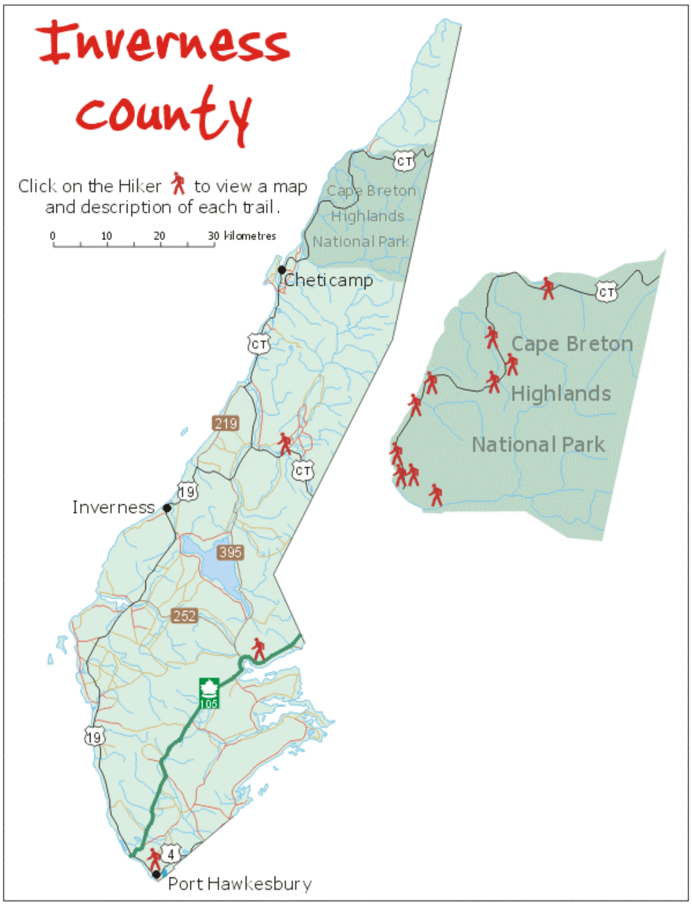
Figure 5.8: Hiking Trails in Victoria County



Source: Trails Nova Scotia

Inverness County also has hiking trails in Cape Breton Highlands National Park, along with a number of other trails, as illustrated in the map of Figure 5.9.

Figure 5.9: Hiking Trails in Inverness County



Source: Trails Nova Scotia

There is also an extensive winter trails network that provides opportunities for activities such as cross-country skiing, snowshoeing and snowmobiling. As the following map (Figure 5.10) indicates, the snowmobile trails network is located in Victoria and Inverness Counties, running from Port Hastings in the south up to Chéticamp in the north. There is potential to expand this network to encompass the other two counties on the Island and provide more circular touring routes for overnight snowmobiling excursions.

Figure 5.10: Cape Breton's Snowmobile Trails

Source: Trails Nova Scotia

MARINE RESOURCES WITH TOURISM POTENTIAL

Cape Breton Island also has a wealth of marine features. These are on the Atlantic Coast east side of the Island, as well as in the Gulf of St. Lawrence and Bras d'Or Lakes areas. The tourism potential in these marine areas complements Cape Breton's land-based resources. Key marine tourism resources include:

- Gulf of St Lawrence – whale watching
- Bras d'Or Lakes – Cape Breton's inland sea – which is an international sailing and cruising destination
- Lake Ainslie – Cape Breton's largest freshwater lake
- Margaree River – designated a Canadian Heritage River (1 of only 5 in Atlantic Canada)
- Warm waters of St. George's Bay for beaching and swimming

- Mira River – popular boating destination and one of Nova Scotia's widest and longest rivers
- The Margaree and Grand Rivers provide ideal conditions for day and multi-day canoe trips.
- Recreational boating/yachting throughout the island provides opportunities to venture along waterways and circuits, while visiting Cape Breton's many yacht clubs and marinas along the way.
- The offshore islands of Scatarie, Bird and Isle Madame provide ideal sea kayaking opportunities for experienced paddlers, while novice and intermediate paddlers can explore the waters of the Bras d'Or Lakes.

Sea Kayaking

The convenient location of coastal islands to Cape Breton creates a number of excellent multi-day sea kayaking paddling routes for more experienced paddlers. There are many possible routes along the Cape Breton Island coastline highlighted by Trails Nova Scotia maps including Isle Madame, the southeast coast, the Bird Islands and Mabou to Port Hood. Scatarie Island Sea Kayak Route is a good example of a "marine trail" (Figure 5.11).

Figure 5.11: Scatarie Island Sea Kayak Route

Source: Trails Nova Scotia

For novice and intermediate paddlers the Bras d'Or Lakes area offers numerous kayaking routes in a more controlled environment. Figure 5.12 illustrates just one of these.

Figure 5.12: Bras d'Or Lakes Sea Kayak Route

Source: Trails Nova Scotia

Canoe Routes

In addition to the sea kayaking on Cape Breton there are a number of rivers that offer excellent potential for canoeing trips. The principal canoe waterways include Margaree River and the Grand River. The duration of canoe trips on these rivers can range from a few hours to a number of days, particularly when river systems are linked together. The following table highlights the variety of canoe trips available on Cape Breton.

Figure 5.13: Key Canoe Routes on Cape Breton

Water Body	Nearest Town	Difficulty	Length
Mira River	Victoria Bridge	Novice, Intermediate	100km (3 days)
Grand River	Loch Lomond	Intermediate	25km (1-2 days)
Margaree River - Southern Branch	Margaree Forks	Intermediate, Advanced	40km (1 day)
Middle River	Lake O'Law	Intermediate	15km (few hours)
Gabarus Wilderness	Gabarus	Novice, Intermediate	Lots of routes
Margaree River - Northern Branch	Margaree Forks	Intermediate	20km (few hours)

Source: Trails Nova Scotia; Canoe Kayak Nova Scotia

Harbours and Waterfronts

There is considerable built infrastructure that enables residents and visitors to enjoy the marine environment. This includes numerous fishing harbours, some major commercial ports, and various community waterfront developments. These harbours and waterfronts combine natural and cultural elements, along with built infrastructure to offer unique visitor experiences.

Sport Fishing

Cape Breton Island has some of the best coastal waters, rivers and inland lakes for salmon and trout fishing in Atlantic Canada. The Margaree is widely recognized as one of the finest Atlantic salmon rivers in the world. The lower 20 miles of the Margaree has over 40 classic pools and innumerable pockets. The lake is famous for its big fall run of **Atlantic Salmon**, which begins about mid-September and continues through to the end of October. The river also hosts a good summer run of fish.

Besides the mainstream Northeast Margaree, the smaller Southwest Margaree River is also good in the fall. Other smaller rivers include the Aspy, Baddeck, North, Middle and Barachois.

- **Eastern or speckled brook trout** are widely dispersed throughout the province and there are both freshwater and sea-run brook trout in Nova Scotia. The annual May fly hatch is probably the most popular time to fish for these trout, which generally lasts for a few weeks in late April and early May

- **Brown trout** were introduced to select watersheds in Nova Scotia in the 1920's and 1930's. These trout are similar to the brook trout and, where they have access to the sea, they will also run in the saltwater. Mira River in Cape Breton County is an excellent river for brown trout
- **Rainbow trout** are relatively new to Nova Scotia waters and the top destination in the province for rainbow trout fishing is the salt waters of the Bras d'Or Lakes.
- **Landlocked salmon**. Cape Breton also has a number of landlocked or freshwater Atlantic salmon that remain in the deeper coldwater lakes. Gabarus Lake, located in Cape Breton County, is an excellent location for freshwater Atlantic salmon
- **Saltwater sport fishing**. Cape Breton Island also has deep-sea fishing for saltwater sport fish such as cod, hake and mackerel

WILDLIFE VIEWING / BIRDING

Cape Breton has a great variety of wildlife habitats and these are well-distributed throughout the Island, as shown in Figure 5.14.

Figure 5.14: Cape Breton's Wildlife Habitats

Region/Area	**Wildlife and habitats**
Cape Breton Highlands National Park & Polletts Cove-Aspy Fault Wilderness Area	▪ Ancient faults, canyons, wetlands and forested old-growth deciduous slopes. ▪ Moose, deer, hares, foxes ▪ Birds - Common Loon, Great Cormorant, Ruffed Grouse, Blackbacked Woodpecker (rare), Boreal Chickadee, Gray Jay, and such warblers as Northern Parula, Ovenbird, Tennessee, Mourning, Bicknell's Thrush, Cape May and Bay-breasted warblers, Evening Grosbeak and Blackburnian. ▪ Some years White-winged Crossbills are present in flocks ▪ A large dragonfly known as the Quebec Emerald, has only been recorded in bogs on the Cape Breton Highlands, and Cumberland County and only a few other locations in the world
Gulf of St Lawrence	▪ Whales - humpback, minke, pilot and fin whales. Rarer encounters can also include beluga, sei, sperm and blue whales. ▪ Dolphins and porpoises
Bras d'Or Lakes	▪ The Island's inland sea covering 260km² ▪ Birds - Nesting bald eagles, Osprey, Great Blue Herons ▪ White-tailed deer, fax, porcupines and raccoons
Bird Islands	▪ Nesting area for many of Nova Scotia's seabirds – Atlantic Puffins,

Region/Area	Wildlife and habitats
	Razorbills, kittiwakes and Great Cormorants.
Gabarus Wilderness Area	▪ This area contains a significant stretch of coastline with harbour and grey seal breeding areas. ▪ Numerous birds including ▪ Sugarloaf Island off the coast has a cormorant colony, while Green Island contains a Black-Legged Kittiwakes colony.
Lake Ainslie- Northeast Margaree	▪ Bald eagles, Osprey and is also home to pine marten, lynx, and moose ▪ The population of Gaspi Shrew in this area is one of only a few known in the world.
Isle Madame	▪ Stop over area for migrant birds on the Atlantic flyway
Big Glace Bay Lake	▪ Migratory bird sanctuary (240 hectares)
General	▪ Fall colours – fiery reds, organs, crimsons and gold ▪ Other species that reside in Nova Scotia include the American Marten, Canada Lynx and Southern Flying Squirrel.

Source: Nova Scotia Department of Natural Resources

Nova Scotia and Cape Breton Island represent one of North America's best birding destinations, particularly for seabirds. This is mainly because of the location on the Atlantic flyway and the diversity of habitat. With over 445 species in the province, Nova Scotia has the third highest rate of bird species in Canada.

- Cape Breton Island is one of the best places to view the Bicknell's Thrush, one of North America's newest bird species, recently split from the Gray-Cheeked Thrush and a highlight for many birders on viewing trips to the Maritimes.
- The marshes at Port Morien are also an excellent place for birders with nesting Common and Arctic terns and often an interesting selection of migrant shorebirds, including scarce species such as Hudsonian Godwit. Port Morien also has a history for hosting many fine vagrant birds including Laughing Gull, Royal Tern, and Northern Wheatear.
- The shoreline habitat along the Bras d'Or lakes is very popular for nesting bald eagles with up to 125 pairs. The number of eagles at Bras d'Or makes it home to the Maritimes' greatest bald eagle nesting population.

Cape Breton also offers some of the best phalageic birding in the Maritimes, especially around the Cape North area. Most of the phalageic birds are best viewed while on the water with a guided boat tour or often from the regular ferry service, like the one between Cape Breton and Newfoundland.

Many tourist operators offer trips to offshore islands, which are often colonies for some species of phalageic birds. On a short trip 10-15km offshore, the following birds are commonly sighted:

- Sandy Shearwaters
- Greater Shearwaters
- Parasitic Jaegers
- Black leg Kittiwakes

Other coastal birds can also be commonly sighted during phalageic birding and these include:

- Bald Eagles
- Atlantic Puffin
- Guillemots
- Jaegers
- Northern Fulmars
- Northern Gannets
- Shearwaters
- Storm Petrels
- Sea Ducks

KEY NATURAL RESOURCES WITH TOURISM POTENTIAL

In conclusion, Cape Breton's natural resources base offers substantial incremental potential for outdoor adventure/ecotourism:

- Any type of trail-based activity:
    - Backpacking and hiking
    - Horseback trail riding
    - Cycling and mountain biking
    - ATV excursions (would need to be in controlled areas)
    - Cross-country skiing, snowshoeing and snowmobiling in the winter
- Various marine trail and coastal excursion activities
    - Sea kayaking
    - Sailing and yacht charters
    - Saltwater fishing

  - Inland lakes and rivers activities
  - Sailing and power boating
  - Canoeing and kayaking
  - Freshwater fishing
  - River rafting (scenic float trips)
- Wildlife-viewing
  - Birding
  - Whale-watching and coastal marine life viewing
  - Other wildlife-viewing (moose, deer, etc.)

6 – INCREMENTAL CULTURAL TOURISM POTENTIAL

Much of Cape Breton's tourism product focuses on the Island's unique culture and heritage including Mi'kmaq, Acadian and Gaelic. Many of Cape Breton's key attractions have a strong cultural or heritage component, including Fortress Louisbourg, Gaelic College of Celtic Arts & Crafts, and the Highland Village.

Cultural and heritage attractions and products provide visitors with a learning experience. Based on the programs offered, this can vary from static displays to the use of historic animation, with costumed actors in period dress providing demonstrations of historic crafts and daily chores. There are currently five sites offering this enhanced cultural experience, which helps to immerse visitors into the time period being portrayed:

- Cossit House, Sydney
- Fortress Louisbourg National Historic Park, Louisbourg
- Miners Museum, Glace Bay
- Nova Scotia Highland Village, Iona
- Sydney Mines Community Heritage Museum, Sydney Mines

Cultural and historical tourism products can be grouped based on the type of product and experience being offered. The following are Cape Breton's strongest cultural heritage themes which are being incorporated into existing tourism products, packages, festival and events:

- Acadian
- Gaelic/Celtic
- Mi'kmaq

There is considerable incremental potential for tourist operators to package and promote new tourism products which focus on one or more of these three cultural themes. This allows them to focus on niche markets with an interest in the particular cultural heritage being interpreted.

- Visitors from Quebec and France may be interested in the Island's Acadian history, while visitors from the United Kingdom may find the Gaelic heritage interesting. However, theming a tour package or product in this manner does not necessarily exclude other market segments.

- The majority of tours to Cape Breton, which are of a general sightseeing nature, typically seek a variety of products and attractions and have a general interest in cultural heritage, as most of their itineraries include visits to various cultural heritage attractions and features.

ACADIAN CULTURAL HERITAGE

The Acadian cultural heritage is based on the early French pioneers who came to Nova Scotia in the 1600s. They settled in the region in 1604 and were later called Acadians. Much of Cape Breton's Acadian product is centred on the western side of the Island, in the town of Chéticamp, with St. Joseph-du-Moine and Margaree nearby.

There is also a strong Acadian presence in Richmond County particularly on Isle Madame and in the communities of Arichat, Petit-de-Grat and Louisdale. Among the key facilities and organizations that highlight various aspects of the Acadian culture are the following:

Figure 6.1: Key Acadian Cultural Features

Name	Location
Centre de Genealogie Pere Charles Aucoin	Chéticamp
Centre LaPicasse	Petit-de-Grat
Co-op Artisanale	Chéticamp
Eglise St. Pierre	Chéticamp
La Pirogue Fisheries Museum	Chéticamp
Le Noir Forge	Arichat
Les Trois-Pignons	Chéticamp
The Acadian Museum	Chéticamp

Of special significance to the Acadian Community is the third Congrès Mondial Acadien in Nova Scotia in 2004, which also coincides with 400 years of French history in Nova Scotia. This world-class meeting reunites and links Acadians internationally. The event will take place over a two-week period starting on July 31st and finishing with the National Acadian Feast Day on August 15th.

- The events and reunions are spread throughout Nova Scotia's Acadian communities
- Chéticamp is the focal point for reunion activities and the Mi-temps show, while Isle Madame also has a major reunion scheduled

It will be important to carefully develop the programming and packages which will enable the region to capitalize upon this international publicity.

- This could relate to an overall "Hallmark Events" strategy for Cape Breton, similar to Newfoundland and Labrador's successful program of landmark celebrations which started with Cabot 500 in 1997.

GAELIC / CELTIC CULTURAL HERITAGE

Cape Breton's strong Gaelic culture stems from original Scottish immigrants who settled in the 1780s to 1820s. The Gaelic culture is an important component of cultural tourism and can be found in several communities on Cape Breton Island including Iona, Inverness, North Shore, North River, St. Ann's, Mabou and Christmas Island. Cultural tourism products highlight the use of the Gaelic language, customs and, especially, music.

Two of Cape Breton's key tourist attractions – the Highland Village in Iona and the Gaelic College of Celtic Arts and Crafts in St. Ann's – provide an excellent insight in to the Gaelic culture. They make use of costumed actors, interpretive displays, interactive activities and cultural performances. These two attractions and other significant Gaelic cultural heritage attractions and features are listed in the table below:

Figure 6.2: Principal Gaelic/Celtic Cultural Features

Name	Location
An Drochaid (The Bridge)	Mabou
Gaelic College of Celtic Arts and Crafts	St. Ann's
Giant MacAskill Museum	Englishtown
Glenora Distillery	Glenville
Lone Sheiling (Shepherds Hut)	Pleasant Bay
MacDonald House Museum	Lake Ainslie
Nova Scotia Highland Village	Iona
South Haven Weavers, Spinners, and Dyers	St. Ann's
The Celtic Music Interpretative Centre Society of Judique	Judique

FIRST NATIONS CULTURAL HERITAGE

The First Nations people of Nova Scotia are known as the Mi'kmaq and have a strong presence on Cape Breton Island. At the time of first contact with Europeans in the 16th and 17th centuries, the Mi'kmaq lived throughout the Maritime Provinces and the Gaspé peninsula. Cape Breton itself was home to approximately 25,000 native Mi'kmaq when John Cabot arrived in 1497.

The table below lists the five First Nations communities on Cape Breton Island. All of these communities are located either on or near the Bras d'Or Lakes:

Figure 6.3: Cape Breton's First Nation Communities

First Nations
Membertou
Chapel Island
Wagmatcook
Waycobah
Eskasoni

- Visitors have the opportunity to experience some of the Mi'kmaq culture through established tourism attractions and products on Cape Breton.

The Wagmatcook Culture and Heritage Centre is one of the key Mi'kmaq tourism products offered. It provides an insight into the life of the Mi'kmaq people and is operated by the Wagmatcook First Nation. Visitors are guided by First Nations members on an interpretive tour of the site and its heritage exhibits and artefacts.

- There are also demonstrations in Mi'kmaq drumming, dancing and storytelling.
- The centre also has a restaurant with traditional and semi-traditional cuisine as well as a gift shop, which sells Mi'kmaq crafts.

Some of the more significant Mi'kmaq attractions are listed in the table below:

Figure 6.4: Key Mi'kmaq Attractions/Features

Name	Location
Chapel Island	Chapel Island
Fortress of Louisbourg National Historic Park	Louisbourg
Mi'kmaq Resource Centre	Sydney
Wagmatcook Culture and Heritage Centre	Wagmatcook
Whycocomagh and District Historical Society	Whycocomagh

Other aspects of the Mi'kmaq culture are of interest to visitors and could be incorporated into tourism products and packages:

- The Mi'kmaq language

- Crafting birch bark wigwams and canoes
- Other crafts such as porcupine quillwork on bark
- Nature tours with a Mi'kmaq perspective on the flora and fauna of the region

These types of products could be offered through demonstrations, interactive workshops or through a combination of these elements. Another possibility is a nature-based tour where food and medicinal plants could be gathered, as they would have been traditionally by the Mi'kmaq people. Cape Breton's First Nation communities have recently been working on tourism product development concepts and ideas which embrace a number of these elements

HISTORIC BUILDINGS AND HERITAGE SITES

Cape Breton also has numerous historical buildings and heritage sites, which can interpret the cultural heritage of the region. These highlight the Island's unique and diverse cultural heritage.

The table below lists some of the principal historic sites on Cape Breton (also see inventory in Appendix B).

Figure 6.5: Key Historic Sites and Buildings in Cape Breton

Name	Location
Alexander Graham Bell National Historic Site	Baddeck
An Drochaid (The Bridge)	Mabou
Cabot Landing Provincial Park National Historic Site	Aspy Bay
Cape Breton Centre for Heritage and Science	Sydney
Celtic Music Interpretative Centre Society of Judique	Judique
Cossit House Museum	Sydney
Dominion Heritage Building	Dominion
Eglise St. Pierre	Chéticamp
Fort Petrie	New Victoria
Fortress of Louisbourg National Historic Park	Louisbourg
Gaelic College of Celtic Arts and Crafts	St. Ann's
Glace Bay Heritage Museum	Glace Bay
Gut of Canso Museum & Archives	Port Hastings
Historical Churches of Whitney Pier	Sydney
Jost House	Old Sydney
Le Noir Forge	Arichat

Name	Location
Les Trois-Pignons	Chéticamp
Little River Fisheries and Heritage Museum	Little River
MacDonald House Museum	Lake Ainslie
North Highlands Community Museum	Cape North
Nova Scotia Highland Village	Iona
Orangedale Railway Museum	Orangedale
St. Patrick's Church Museum	Sydney
Sydney & Louisbourg Railway Museum	Sydney
Wallace MacAskill House	St. Peter's

Arts and Crafts

Arts and Crafts are featured throughout Cape Breton at a range of museums and heritage centres. These arts and crafts are primarily reflective of the Acadian and Gaelic cultural themes. Several examples are listed below (see also the attractions list in Appendix C and a more detailed listing of craft shops in Appendix E).

Figure 6.6: Significant Arts and Crafts Outlets in Cape Breton

Name	Location
Acadian Museum	Chéticamp
An Drochaid (The Bridge)	Mabou
Cape Breton Centre for Craft and Design	Sydney
Co-Op Artisanale	Chéticamp
Elizabeth LeFort Gallery & Museum	Chéticamp
Gaelic College of Celtic Arts and Crafts	St. Ann's
Inverness County Council of the Arts	Inverness
Inverness Miner's Museum	Inverness
Isle Quilt Market	Port Hawkesbury
Les Trois-Pignons	Chéticamp
MacDonald House Museum	Lake Ainslie
Margaree Fish Hatchery and Visitor Centre	Margaree
Margaree Salmon Museum	Margaree
Nova Scotia Highland Village	Iona
South Haven Weavers, Spinners, and Dyers	St. Ann's
Sydney Mines Community Heritage Museum	Sydney Mines
Wallace MacAskill House	St. Peter's

In addition to the preceding, there are numerous crafts shops, studios and galleries throughout Cape Breton that offer arts and crafts for sale to visitors. The arts and crafts range from fine art (including painting, photography) to rug-hooking, pottery-making, weaving and other crafts. These can potentially be featured in workshop sessions that form components of experiential vacation packages or learning vacations with a cultural focus. It is important to effectively link into the tourism marketplace, as the Gaelic College has done over the years by marketing itself as a tourist attraction or point of interest for visitors interested in traditional arts and crafts.

OTHER CULTURAL TOURISM PRODUCTS AND POTENTIAL

Cape Breton's other cultural tourism products can be grouped under several specific themes. These themes include the following:

- Science and Technology
- Industrial History
- Transportation and Railway History
- Nautical Heritage
- Palaeontology and Fossils

Specific themes and packages/itineraries based on them could appeal to different target audiences. There are already some significant attractions and features which are based on these themes.

Science and Technology Heritage Theme

Science and technology is a key heritage theme for Cape Breton, primarily because of the world-renowned inventor, Alexander Graham Bell, whose scientific and technological experiments were quite extensive. The Alexander Graham Bell National Historic Site is one of Cape Breton's icon attractions and it communicates the story of Bell's wide range of interests and inventive work, much of which was undertaken in Baddeck, especially his experimentation with flight.

To complement the Bell Museum, there is the Centre for Heritage and Science, as well as the Marconi National Historic Site, where Guglielmo Marconi sent the first wireless message across the Atlantic.

Figure 6.7: Science and Technology Attractions

Name	Location
Alexander Graham Bell National Historic Site	Baddeck
Cape Breton Centre for Heritage and Science	Sydney
Marconi National Historic Site	Glace Bay

Industrial Heritage Theme

Cape Breton has a long industrial history that stems back to the early French pioneers' establishment of North America's first coal mine. This occurred at Port Morien in 1720. Much of the Island's industrial (and particularly mining) heritage focuses on the Glace Bay area just east of Sydney, along the "Colliery" Route 28. This trail integrates several attractions (e.g., Miners' Museum) and features. While a number of these attractions focus on coal mining, the North Highlands Community Museum in Cape North offers an insight into Cape Breton's Gypsum mining history.

There are a number of museums and historic sites that highlight this aspect of Cape Breton's cultural heritage.

Figure 6.8: Principal Industrial Attractions/Features

Name	Location
Cape Breton Miner's Museum	Glace Bay
Glace Bay Heritage Museum	Glace Bay
Gut of Canso	Port Hastings
Inverness Miner's Museum	Inverness
MacDonald House	Lake Ainslie
New Waterford Historical Society	New Waterford
North Highlands Community Museum	Cape North
Port Morien French Mine	Port Morien
Sydney Mines Community Heritage Museum	Sydney Mines
Whitney Pier Historical Society	Sydney

Transportation and Railway Heritage

Cape Breton's transportation and railway history is illustrated through a number of key attractions. These offer an insight into the construction and design of the Island's transportation infrastructure. The following attractions could be combined into tourism packages with some of Cape Breton's existing passenger transportation services such as the inland cable ferries, Newfoundland ferry service and VIA Rail Bras d'Or train service from Sydney to Halifax.

Figure 6.9: Transportation/Railway Heritage Attractions/Features

Name	Location
Alexander Graham Bell National Historic Site	Baddeck
Glace Bay Heritage Museum	Glace Bay
Gut of Canso	Port Hastings
Orangedale Railway Museum	Orangedale
Sydney & Louisbourg Railway Museum	Sydney
Le Noir Forge	Arichat

Maritime Heritage

Its location in the Atlantic Ocean means that Cape Breton has a strong maritime heritage that is reflected in some of the Island's key attractions. There are two fisherman's museums on the Island, as well as interpretative centres that provide visitors with insights into the region's maritime heritage. Many of the community museums also portray elements of their own local maritime history and could be incorporated into a nautical package tour itinerary or product.

Figure 6.10: Principal Maritime Heritage Attractions

Name	Location
Atlantic Statiquarium Marine Museum	Louisbourg
Bras d'Or Lakes & Watershed Interpretive Centre	Baddeck
Fisherman's Museum	Main-á-dieu
La Pirogue Fisheries Museum	Chéticamp
Lighthouse Battery Provincial Park	St. Peter's
Little River Fisheries and Heritage Museum	Little River
Louisbourg Lighthouse	Louisbourg
St. Peter's Canal Historic Site	St. Peter's
Whale Interpretive Centre	Pleasant Bay

The nautical heritage product could be further enhanced by activities such as boat charters, whale watching, deep-sea fishing and paddling trips. These could be staged in numerous locations throughout Cape Breton from coastal

Cape North to the inland sea of the Bras d'Or Lakes. The many shipwrecks of the region form a part of this heritage.

Palaeontological Heritage

Palaeontology and fossils is another important heritage theme. Cape Breton also contains a number of sites that offer potential for rock hounding and fossil enthusiasts. While this is likely a secondary activity and may be part of a larger overall product or tour, it adds variety and a really unique product component.

Cape Breton contains one of the eight sites considered significant for fossils in Nova Scotia. These fossils are contained within the shales and sandstones overlying the seams of the Sydney Coalfield, the largest coal resource in eastern Canada. Examples of fossils include the trunks of extinct trees, impressions of fern leaves and other plants, which inhabited the area 300 million years ago.

The Fossil Display and Interpretation Building located in the Sydney Mines Community Heritage Museum is an excellent resource for learning about the area's fossil deposits. The Fossil Display includes a collection of fossils that have been catalogued and identified by the UCCB. Local stakeholders have been developing and promoting the concept of a major fossils museum to showcase this unique aspect of Cape Breton's heritage.

The nearby Port Morien French Mine has also been designated by the Government of Nova Scotia as a protected site under the Special Places Protection Act (1989). The mine has both historical and palaeontological significance

Cape Breton also has a history of prehistoric mammal discoveries:

- The first mastodon (similar to a mammoth) fossil found in Nova Scotia was a femur (thigh bone) discovered in Lower Middle River, Victoria County in 1833
- This bone is now on display at the Museum of Natural History in Halifax.
- A mastodon molar tooth was also found in Baddeck in 1895

There has been recent media publicity regarding the significance of recent fossil finds on Cape Breton which will stimulate market interest in this theme.

OVERALL CULTURAL HERITAGE POTENTIAL

Combining culture and heritage with outdoor adventure can result in unique tourism products and packages with broad appeal. The majority of the cultural and heritage products mentioned can be combined more extensively with outdoor adventure activities to offer a variety of experiences to visitors. Many of the adventure products already include elements of cultural heritage interpretation in their programs, because of the significant linkages among nature, adventure and culture

- Adding a small amount of soft adventure to a cultural heritage product can often broaden its appeal
  - For example, by combining cycling with a tour of historic buildings in a community
  - Or sea kayaking to some of the coastal heritage sites
  - It is a unique way of using some of the soft adventure products as a mode of transport in order to access and experience specific cultural heritage attractions and features.

In conclusion, tourism attractions, points of interest, festivals/events, and packages development can draw on a wide range of themes and combinations thereof including:

- Acadian, Celtic, and Mi'kmaq
- Historic buildings/architecture and arts and crafts
- Science and technology and industrial history
- Transportation and railway history, and maritime/nautical heritage
- Palaeontology and fossils.

7 – CONSULTATION PROCESS

Throughout the study process, consultation was undertaken with various key stakeholders throughout Cape Breton. Early on in the process a series of public meetings provided important information and ideas to the consulting team. Overall results are reported here and, along with the preceding analysis in this document, provided key input for the SWOT Analysis, which is reported on in Appendix A.

RESULTS OF PUBLIC MEETINGS

Obtaining stakeholder input and support was an important component of he study process. Public meeting sessions were held with a wide range of tourism stakeholders across Cape Breton.

- Groups of 16 to over 30 attended in 9 locations across Cape Breton.

The sessions enabled the consulting team to hear the views of all types of tourist operators:

- Both public and private sector
- Small, medium, large
- Young, middle-aged and older business owners/entrepreneurs
- Recent entrants to the business, and those with long tenures of 20-30 years or more.

Over 200 participants attended the nine sessions. The public meetings were held during week of June 17th 2002 (see Figure 7.1).

The mood of participants ranged from enthusiastic and optimistic to somewhat frustrated.

- The enthusiasm and optimism revolved around the potential for new tourism products, packages and markets.
- Frustration was associated with difficulties faced by businesses as a result of marketplace changes, concerns about inadequate destination marketing for Cape Breton, and infrastructure constraints.

Figure 7.1: "Tourism Road Map" Public Meetings

Community	Date and Time		Location	No. of Attendees*
Baddeck	Monday, June 17, 2002	12:00 - 2:30 pm	Baddeck Community Centre	26
Inverness	Monday, June 17, 2002	7:00 - 9:30 pm	Inverness Education Centre	21
Cheticamp	Tuesday, June 18, 2002	12:00 - 2:30 pm	Cheticamp Seniors Hall	33
Northeast Highlands	Tuesday, June 18, 2002	7:00 - 9:30 pm	Cape North Fire Hall	17
Louisbourg	Wednesday, June 19, 2002	12:00 - 2:30 pm	Stella Maris Church Hall	27
Sydney	Wednesday, June 19, 2002	7:00 - 9:30 pm	Centre 200, MacDonald Room	34
Port Hawkesbury	Thursday, June 20, 2002	12:00 - 2:30 pm	The Creamery	20
Arichat	Thursday, June 20, 2002	7:00 – 9:30pm	Royal Canadian Legion	17
Iona	Friday, June 21, 2002	12:00 - 2:30 pm	Nova Scotia Highland Village	16

** These numbers are based on those who signed attendance sheets, and are in addition to members of the consulting team and officials from Cape Breton Growth Fund Corporation who also attended.*

The goal of the discussion sessions was to obtain broad input on tourism opportunities and challenges from a wide range of stakeholders. The consultants started each session with an overview presentation providing the project objectives and context. Discussion topics in the sessions included:

- Background on current products and markets
- Emerging markets and new product opportunities
- Packaging and Marketing
- Key constraints and challenges faced in pursuing new opportunities
- Organizational issues facing Cape Breton's tourism industry
- Requirements for implementation.

In most sessions we broke-out into two separate discussion groups which enabled excellent roundtable discussions.

- Each group appointed a flip-chart note-taker and presenter (who summarized in the plenary wrap-up session at the end).
- Flip-chart notes were transcribed and are Appendix A to this document.

Reactions to the "Tourism Road Map" project were generally very positive. Many tourist operators and other stakeholders attended the sessions, and were for the most part enthusiastic about the process and project, and helpful in the discussions. Attendance at most sessions was higher than expected, given the busy time of year.

Generally a diversity of different types of tourist operators attended including accommodation operators of all types and sizes, a diversity of attraction operators (both public and private sector), restaurateurs, tour/excursion operators, and arts and cultural community representatives.

- Officials of county and community economic and community development organizations attended
- Some elected officials and municipal planners also attended

Operators shared their own experiences and offered constructive suggestions. The focus was on generating good ideas for marketing, packaging and product development, as well as highlighting some of the problems and difficulties faced by operators.

Current markets catered to by Cape Breton tourist operators are primarily drive-in from Atlantic Canada and New England States. The Canadian Markets most commonly tapped-into by operators include:

- Nova Scotia, with a strong draw from Halifax
- Other major Atlantic Canada cities (Moncton, Saint John, St. John's, Nfld.)
- Ontario, which is a combination of fly and drive-in traffic

International markets are important to many operators:

- United States, especially drive-in traffic from New England and Mid-Atlantic states (primary markets within 10-12 hour drive) – many take ferry service to Yarmouth and then drive up
- Longer haul fly-in US business is significant for some operators – often escaping the heat of the southern states (e.g. Florida, Texas)
- There is a small but increasing percentage of international clients, particularly from Germany and the U.K. (a higher yield market because of length of stay).

The marketing activities of the operators varies and includes the following:

- Individual pamphlets, brochures distributed primarily via mail and visitor centres
- Rapidly growing use of the Internet which has produced good results for most
- Advertisements in various printed travel guides (local, county, Cape Breton, Nova Scotia).

Regional differences in the various discussions related to specifics of the local product base and potential opportunities.

- **Baddeck session** – discussed development of the Bras d'Or Lakes as a premier tourism product, infrastructure needs of the Cabot Trail, need for a major cultural/performing arts centre, arts and cultural festival development, and the need to better harness the use of volunteers throughout the tourism sector.
- **Inverness session** – emphasized potential for trails development, proposed Jack Nicklaus "Links" championship golf course and seaside resort, the need to upgrade roads infrastructure and signage, potential Port Hood-P.E.I. Ferry, and enhancement of the beaches product on the western shore of Cape Breton (warm waters locally).
- **Cheticamp session** – discussion focused on importance of le Congres Acadien 2004, enhanced development of attractions/events around the Acadian cultural theme, ecotourism potential of the region, the need to upgrade the road infrastructure and signage along the Cabot Trail, and the potential of tapping into the Quebec market.
- **Northeast Highlands session** (held in Cape North) – concern about possible over-development and need to preserve natural environment, opportunities related to winter tourism, need to enhance the Cabot Trail, and training/staffing needs.
- **Louisbourg session** – product development ideas focused on the maritime theme (shipping, history, lighthouses, harbour development and cruise ship visits), potential of the Fleur de Lis Trail, and the aviation and communications history (Marconi).
- **Sydney session** – discussed a range of issues including infrastructure enhancements (harbour clean-up), convention centre development, major gateway visitors centre, cruise ships business enhancement, attracting more meetings/conventions, crafts development, trails and parks development, and sport tourism.

- **Port Hawkesbury session** – emphasized improvements to the Causeway, improved signage, expanded visitor information centre and greeting capabilities, possible ferry service to P.E.I., need for more diversified cultural and entertainment offerings, need to upgrade and expand accommodations, and pursuit of conferences and meetings.
- **Arichat session** – attendees suggested better linkages between Acadian and Aboriginal communities, enhanced destination marketing stressing key themes (seacoast, heritage, culture and nature), improved road infrastructure and signage (especially Fleur de Lis Trail), and strengthened cultural packages (e.g. music, genealogy).
- **Iona session** – emphasis was on the relationship between culture and tourism (Celtic Colours a good model), development of an aquarium at Barra Strait focused on Bras d'Or Lakes, learning vacation concepts, and the need for enhanced destination marketing and promotion, and marine activities related to the Bras d'Or Lakes.

New Markets

Emerging markets and new product opportunities are being considered by some Cape Breton tourist operators. Although it can be difficult to penetrate new markets, many tourist operators recognize the potential of key segments and the need to tap into new markets. Outdoor adventure and ecotourism market opportunities were cited frequently and tapping into markets for Gaelic, Acadian and Aboriginal cultures.

Emerging market opportunities cited by operators include:

- Mature travellers market ("Baby Boomers" now in or entering 50-plus age bracket)
- Southern U.S. markets (Florida, Texas, Arizona) - too hot in the summer, so will head north to cool off
- International markets, especially Europe (U.K., Germany, France)

Many operators recognize that markets are changing and demanding higher quality and service levels and it was noted that some operators have not always kept pace.

Need for infrastructure upgrading and stronger destination marketing for Cape Breton to better tap into traditional and new markets.

KEY PRODUCT AND PACKAGING OPPORTUNITIES SUGGESTED

Breakout group sessions provided good ideas on product and packaging opportunities including the following:

- Trails development throughout Cape Breton (noted in all sessions as a priority)
- Championship "Links" golf course in Inverness
- Wildlife-viewing packages of various types, including whale-watching and bird watching
- Gateway visitor centre complexes (Port Hastings, Sydney)
- Motorized and non-motorized adventures (hiking, cycling, boating, sailing, snowmobiling, ATVs)
- Convention centre development for Sydney
- New culturally-themed festivals and events
- Product development/promotion related to le Congres Acadien 2004
- Aquarium and marine research facility at Barra Strait
- Canoeing and kayaking (coastal, Bras d'Or Lakes, Lake Ainsley)
- Float plane service between Halifax Harbour and Sydney Harbour
- Aboriginal cultural experiences
- Cultural/entertainment packages with accommodations
- Tourism information tapes and/or tourism radio station
- Fossil Centre – Sydney Mines
- Conferences and retreats in shoulder seasons
- Enhancement of key touring routes – Cabot Trail, Fleur de Lis Trail
- Maritime themed attractions/package development (shipping heritage, shipwrecks)

PRINCIPAL CONSTRAINTS AND CHALLENGES

Cape Breton's tourist operators noted several key constraints and challenges faced in pursuing new opportunities:

- Some tourist operators feel overwhelmed by market changes and the investment needed to pursue new opportunities

- Some operators were unclear regarding the extent of product development needed versus marketing needs
- Financing for initial development, upgrading or expansion of tourist businesses is difficult
- Access to capital is an ongoing problem in the tourism industry
- Current revenues often preclude the ability to secure financing – seasonality a problem
- Insurance is major concern for adventure/ecotourism operators
- Marketing, promotion and packaging can be a challenge.

There was also a perception that much provincial marketing has not benefited Cape Breton or featured it adequately, in the view of Cape Breton tourist operators. They felt that Cape Breton's market potential is undervalued/under-promoted and the lack of funds for destination marketing of Cape Breton was raised as a key issue.

As a result, there is inadequate awareness of Cape Breton in key target markets. Enhanced Internet marketing of Cape Breton as a destination, and by individual operators, is considered key along with broad-based destination marketing.

8 – TOURISM DEVELOPMENT OPPORTUNITIES

This section identifies a wide range of potential tourism development opportunities, which could assist Cape Breton in enhancing its tourism industry.

This long-list of opportunities has been selected based on a comprehensive analysis of the existing and potential market trends to determine the actual market for Cape Breton's tourism product. Many of the opportunities address gaps in Cape Breton's product base, while others seek to enhance the existing infrastructure. In some cases the development opportunities are already being pursed.

The long-list is also the result of an extensive stakeholder consultation process that was conducted throughout the island and design to elicit input from all communities. An analysis of Cape Breton's existing infrastructure and natural resources, including the compilation of an extensive inventory has also played a major role in the selection of the opportunities for the long-list.

The first part of this section lists the opportunities selected by category. The long list of products seen here are then matched against a set of product/market match criteria to highlight the opportunities that have the greatest potential for Cape Breton. This list of priority development opportunities in Chapter 10 are drawn from those which rate among the highest in the product-market match analysis.

LONG LIST OF TOURISM OPPORTUNITIES

The long list of potential tourism development opportunities are grouped into several categories, as follows:

- Accommodations
- Attractions
- Cultural Heritage
- Infrastructure
- Packaging
- Outdoor Adventure

This subsection examines each of the above categories and identifies specific opportunities and where they could potentially be located.

Accommodation

Cape Breton already has an extensive inventory of accommodation facilities, many of which are concentrated in and around the major urban centres. However, many operate with relatively low occupancy rates, especially during the shoulder and winter seasons. This indicates that there is still capacity within the existing accommodations base to absorb incremental demand, at least in the shoulder and winter seasons. Therefore, the long-list of opportunities in Figure 8.1, focuses on strategic additions to the existing infrastructure where Cape Breton is lacking in a specific type of accommodation product, as well as recommendations for upgrading and enhancing existing facilities.

While some of these are location-specific (such as the Inverness Resort), others (such as the eco-adventure lodge concept) could be developed at a few different locations.

Figure 8.1: Accommodations Opportunities

Possible Location(s)	Opportunity	Description
Inverness	Inverness Links Resort and Golf Club	4/5 star lodge/resort style accommodation facility to support proposed championship golf course development and take advantage of the fine beaches
Northern Highlands / Fleur-de-lis Trail	"Safari Cape Breton" Eco-Adventure Lodge(s)	The ideal local would be a spectacular natural setting (e.g. Cliffside, overlooking ocean) in a relatively remote location with access by boat, helicopter, and/or 4 wheel drive (similar successful concepts in BC)
Chéticamp / Louisbourg	Hostel/backpacker lodge	Hostel facility near key adventure activities and natural attractions
Lake Ainslie	Campground development	Develop a full-service commercial campground, perhaps near Trout Brook Park, and including good RV sites
Island-wide	B&B, farm stay upgrades	Upgrade existing B&B and farm stay accommodations, as well as adding new locations in smaller communities and near attractions
Port Hawkesbury	RV park for area	RV friendly park with facilities that appeal to the RV market, such as full hook-ups

Possible Location(s)	Opportunity	Description
Island-wide	General accommodation upgrades	Upgrading of Cottages, cabins, lodges and hotels to bring them in line with current market place expectations
Island-wide	High-end 4-5 star resort development(s)	Full service year-round resort concept in attractive coastal setting with outstanding views, focused on growing niche market segments such as soft adventure, spas, winter adventures/getaways, learning vacations.

Attractions

The attractions long-list contains a number of wide-ranging opportunities located throughout Cape Breton Island. These opportunities primarily address Cape Breton's existing infrastructure, as the island already has a number of world-class attractions. By enhancing and updating the physical infrastructure as well as the programming at these attractions, Cape Breton's tourism industry will be better positioned to develop additional tourism related facilities and services around these attractions.

Figure 8.2: Attraction Opportunities

Possible Location(s)	Opportunity	Description
Cabot Trail Canso Causeway	Cabot Trail World Class Scenic Drive "Ciad Mille Failte" Welcome Centre	Interpretation and substantially improved Trail road signage, including additional viewpoints and pull-offs with interpretive plaques Establish a premier gateway centre at the causeway to intercept tourists as they arrive on the Island and provide them with information on travelling around Cape Breton
Louisbourg	"Seasons at the Fortress"	Expand the availability of full services and facilities into the shoulder seasons, since these attractions are catalysts for the industry in Cape Breton
Iona	Highland Village Scottish theming	Expand on the links established with the Highland Folk Museum in Scotland to showcase the Scottish heritage in Cape Breton. Priorities include acquiring a church and expanding the visitor centre.
Bras d'Or Lakes	Cape Breton/Bras d'Or Lakes cruising	Develop a charter yacht cruise business based on the Bras d'Or Lakes and catering to the high end American market

Possible Location(s)	Opportunity	Description
Sydney and other communities	"We Rise Again" Festival Cape Breton	Season-long festival entertainment with linkages to communities across the Island, including performing arts facilities
Baddeck	"Wings" Hall of Flight Attraction Development	Build a display/exhibit "Hall of Flight" at the Alexander Graham Bell Museum focused exclusively on Bell's work on flight. Develop an event or festival around the theme
Bras d'Or Lakes	Salt Water Lakes Environmental Centre	A centre and visitor attraction for interpretation of the salt-water lakes environment. The centre could also provide research facilities to study the lakes area (could expand existing centre in Baddeck). There could also be walking trails with view-points and interpretative signage
Eskagoni First Nation	Unama'ki Institute	Promote/facilitate development of this eco-centre for the Bras d'Or area, with a focus on the First Nations relationship with the environment
Baddeck or Sydney	Major Performing Arts Centre	A facility for staging major events and shows for the arts sector
Sydney Mines	Cape Breton Paleontology Centre	Engage partnerships to develop a comprehensive fossil museum offering a total experience and possibly paleontological research
Glace Bay	"Men of the Deeps" Miners' Museum and Colliery Heritage District	Expanded museum and adjacent heritage district in Glace Bay itself
Margaree River	Enhance signage and programming for the Salmon Museum	Enhanced signage for the Salmon Museum that highlights the facility as a key attraction. Develop a late summer or fall event for the returning salmon, anchored by the museum
Island-wide	Create a Winter Festival(s)	Focus on winter activities, Christmas lights and carols. Winter races or festivals based around activities like snowshoeing
Fleur-de-lis Trail	Fishing Village	Creation of a traditional Cape Breton fishing village with interpretation, boat tours, and a small community museum
Isle Madame, Cheticamp	Acadian Welcome Centre	Visitor interpretation and information centre focusing on Acadian culture and directing visitors to key attractions
Chéticamp	Sound & Light Show	Re-enactment of historical events

Possible Location(s)	Opportunity	Description
Two Rivers	Atlantic Canada Nature Centre and Wildlife Sanctuary	Expand on existing wildlife park with additional themed components focused on Cape Breton's natural history. Use as a staging point for ecotourism activities and learning vacations.

Cultural and Heritage

The cultural and heritage opportunities focus on Cape Breton's Acadian, Aboriginal and Gaelic themes, which are manifested at numerous locations throughout the Island. Many of these opportunities provide a chance for Cape Breton's smaller communities and First Nations to participate in tourism, by building on Nova Scotia's reputation as a cultural destination. These opportunities highlight the need to expand or enhance many of Cape Breton's heritage sites, as well as better integrate and link together existing cultural activities and products.

Figure 8.3: Cultural and Heritage Opportunities

Possible Location(s)	Opportunity	Description
Island-wide	Integrated Marketing Program for Community Museums	Create an island-wide information network, linking community museums and heritage associations with each other and the tourism industry (VICs), to provide an information sharing network for residents and visitors.
Eskasoni	Support the Eskasoni First Nation Cultural Tourism Project	Development of contemporary cultural tourism in community, with long house, interpretation, crafts, potential for ecotourism to nearby islands on the Bras d'Or lakes
Chapel Island	Chapel Island First Nation interpretive sites	This community has shown interest in developing cultural tourism, with significant potential for archaeological sites and interpretation
Island-wide	Mi'kmaq "Time Travel" Aboriginal Cultural Experience	An Aboriginal themed package of experiences that links cultural products from the four Aboriginal communities around the Bras d'Or Lakes with those of Membertou in Sydney.
Island-wide	Develop Showcases and Galleries	Look at new partnership opportunities to display arts and crafts to the public through retail outlets, galleries and public sector facilities.

Possible Location(s)	Opportunity	Description
Island-wide	"Connexion Acadian" Cultural Experience	Acadian Experience package featuring Acadian communities and products. Promotion of all Acadian experiences under one "brand", to give visitors a true sense of the culture and timelessness.
Island-wide	"The Celtic Celebration" Cultural Experience	Orientation to the Celtic Experience will occur at the Welcome Centres within Celtic communities that serve as a link to join Celtic products and services throughout the island.
Sydney	Develop Fort Petrie	Enhance the Fort experience through more interactive displays and perhaps guided tours
Grand Greve	Enhance interpretation at Battery Provincial Park	Significant archaeological site with late 18th century British Forts, only minor interpretation at present. Existing hiking trails in area could be combined with natural history interpretation
Port Hood	Indian Point Site Interpretation	Potential for this site to be developed into an archaeological interpretive site through a local community group
Mabou	Mabou Highlands Heritage Site	A large and well-preserved early Scottish settlement, extensive trail system already in area, great potential for interpretative displays and further development
Louisbourg	Louisbourg Maritime History Centre	Create interpretive programs and features to illustrate the history of airplanes and ships and their role in the development of Louisbourg
Highland Village	Genealogy Centre	This facility would offer access to various public records to enable interested parties to track their family history
Judique	Music Centre	Celebrating the strong musical heritage of this community
Island-wide	"Meet Cape Bretoners" program package	This would essentially be a "Home visit" program which has been quite successful in other countries

Infrastructure

Cape Breton has a fairly extensive network of roads throughout the island, ferry services to Newfoundland and an expanding trails system. The long-list of opportunities focuses on enhancing and expanding the existing infrastructure to upgrade it to a higher physical standard for visitors and residents alike, as well as improving on the associated directional, viewscapes and interpretive/informational infrastructure.

Infrastructure opportunities include the enhancement of existing facilities and some new additions. These opportunities clearly suggest that more can be achieved in the provision of road signage and visitor information services.

Figure 8.4: Infrastructure Opportunities

Possible Location(s)	Opportunity	Description
Sydney	"Conventions Cape Breton" Trade and Exposition Centre	Development of a full-fledged convention centre facility to better meet the needs of the meetings and conventions market.
Island-wide	Sustainable Communities Program	Develop a sustainable communities program based on "Green Globe" standards
Sydney	"Sydney-by-the-Sea" Waterfront and Downtown Heritage	Downtown/waterfront of Sydney would offer a mix of facilities, services, events, activities and attractions that can be integrated into packages to link visitor experiences.
Island-wide	Enhanced Signage for touring trails and attractions	Certain areas across Cape Breton suffer from a lack of or inadequate signage. A coordinated program of signage enhancement should be initiated.
Sydney, Louisbourg	Enhanced harbour development	The harbour is a focal point for visitors. Facilities such as boardwalks, signage and interpretation can enhance the experience.
Island-wide on Main Highways	Enhance road shoulder and pull-off areas	Focus on enhancing and increasing size of highway shoulders for safer biking and creating further pull-offs for sightseeing and rest stops, ideally with interpretive displays or plaques, where appropriate
Sydney	Welcome Centres at Ferry Terminals	Establish Cape Breton Welcome Centres at external ferry terminals such as Port Aux Basques and Argentia.
Fleur-de-lis Trail	Fleur-de-lis Trail "Route Ancienne"	Work with the Province to close the gap to create a full touring loop. Add better Trail signage, establish additional rest stops, and interpretive viewpoints.
Sydney	Highway Visitor Information Centre	Major visitor information centre at highway entrance to the city
Island-wide	"e-CB" Tourism e-Commerce Development	Develop partnership to enhance high-speed connectivity throughout Cape Breton to facilitate tourism businesses in marketing, distribution and sales.

Possible Location(s)	Opportunity	Description
Louisbourg	Shuttle & Cruise Service	Land and water based shuttle service to Fortress from surrounding communities
Bras d'Or Lakes	Develop a lakeside Heritage Trail	Link the communities and sites in the area: Battery Park, Chapel Island, Eskasoni, Whycocomagh, Nicholas Deny's Museum and St. Peters Canal
Bras d'Or Lakes	Major Marina	Development of a full service marina in the Bras d'Or Lakes to cater to the cruising market
Bras d'Or Lakes	Highway 4 Touring Route	Highway 4 route enhancement, which would likely include scenic lookouts, touring signage, enhanced viewscapes and rest areas.

Packaging

Cape Breton has a fairly extensive array of tourism products, in a variety of sectors including: culture, performing arts, outdoor adventure and ecotourism. The links and communication among these sectors is often limited, even though their products are very complementary.

The packaging opportunities highlight the Island's local culture/heritage and natural features. Packaging provides a means of combining many of the Island's complementary products and services into convenient and manageable tours or itineraries. The packages provide a broader and more organized approach to experiencing Cape Breton's sights, nature and culture.

Figure 8.5: Packaging Opportunities

Possible Location(s)	Opportunity	Description
Chéticamp	Packaging Acadian products	Further emphasis on packaging products and partnering with other service providers to offer a more diverse experience that appeals to a wider audience
Inverness County	Winter Snowmobile Packages	Establish trail maps and packages based on accommodation properties along the route. Market to Canadian and U.S. clubs.
Cabot Trail	Outdoor/multi-sport packages	Packaging of activities and accommodations to create multi sport packages where participants participate in numerous outdoor activities (e.g. kayaking, biking and hiking)

Possible Location(s)	Opportunity	Description
Chéticamp	Le Congres Acadian 2004	Build on this marquee event by packaging it with other Acadian products and reunion experiences
Island-wide Glace Bay area	Learning Vacation Packages Marconi Trail Package	Focused on both cultural and natural heritage of Cape Breton Focused on the communications heritage of Cape Breton and anchored by the existing Parks Canada Marconi Interpretive Centre
Glace Bay area	Colliery Trail Mining Heritage	Linking the various mining attractions and features in the area along this existing route
Island-wide	"Taste of Cape Breton" Food & Cuisine Packages	Local Acadian, Gaelic and Maritime cuisine packages that could include activities such as harvesting the ingredients (e.g. wild mushrooms).
Island-wide	Lighthouse Packages	Package programs focusing on Cape Breton's many lighthouses
Island-wide	Sports tourism development	Build community capacity by expanding existing sporting events and hosting new events
Iona	Gaelic Trail or package around Highland Village & Gaelic College	Package a Gaelic Trail product anchored around the Gaelic College & Highland Village in Iona and promote the village's links to Scotland
Island-wide	Educational and outdoor packages for youth market	Educational products are in demand and offer visitors a chance to explore Cape Breton's history and heritage.
Cape North Area	Cape North Cultural Discovery	Cultural discovery packages in the north including attractions like the Octagon Arts Centre and North Highlands Community Museum, which would likely require some facility upgrading and enhancement.
Inverness County	Beach Packages	Package accommodations and activities located on the coast and stress Cape Breton's beaches and warm waters
Island-wide	Shoulder season events	Develop activity packages that focus on festivals/events or outdoor activities to entice visitors in the shoulder and winter season.
Dingwall & Ingonish	Northern Scuba Diving Packages	Scuba packages in the Northern part of the Island including the communities of Dingwall, St Paul's Island and Ingonish.

Outdoor Adventure/Ecotourism

Cape Breton has a good collection of outdoor adventure/ecotourism products – however, the majority of these focus on ocean-based activities. Considerable potential exists to develop the Island's existing nature-based tourism industry to include more land and winter-based products that will diversify and expand the existing product base. The long-list of opportunities focuses on enhancing winter outdoor adventures to further extend the tourist season and developing land based adventures to complement the marine activities.

Figure 8.6: Outdoor Adventure/Ecotourism Opportunities

Possible Location(s)	Opportunity	Description
Margaree	Develop the shoulder season fishing	Potential to market Margaree sport fishing more aggressively, with events and activities focused around the fall salmon runs
Inverness	Expansion of snowmobile infrastructure	Mapping of snowmobile trails and development of infrastructure to enable package development
Island-wide	"Trails for All Seasons" Development Plan	Develop a comprehensive trails development plan for Cape Breton which integrates both existing and proposed trails networks, focusing on year-round opportunities and multi-use trails.
Cape Breton Highlands	Winter camping concept	Camping in the highlands with winter survival skills training, winter travel (Nordic activities), mammal viewing and tracking
Northern Highlands	Hiking and Ski Touring – hut to hut	Develop an infrastructure of huts to enable this type of long distance hiking and ski touring; could also do village to village
Louisbourg	Exploring Shipwrecks/scuba diving	Guided diving expeditions to explore the history of the Louisbourg shipwrecks
Sydney, Baddeck, Louisbourg, Inverness	Boat Tours	Sightseeing boat tours based out of each of these communities and featuring strong natural and cultural heritage themes, with onboard commentary
Sydney	Expand sea kayaking product	Further sea kayaking product. Both coastal and inland routes/ products

Possible Location(s)	Opportunity	Description
Island-wide	"A Passage East" Cape Breton Eco-Cruise	A small ship (15-100 passengers) cruising along Cape Breton's coast and Bras d'Or Lakes, with a focus on history and nature discovery.
Island-wide	Develop more wilderness interpretation	Create more sites and places to stop to view flora and fauna. This initiative would include roadside plaques that help illustrate local habitat and fauna.
Island-wide	Enhance non-motorized winter products	Encourage development of snowshoeing, cross-country skiing, backcountry survival, dog-sledding in or near the parks.
Highlands	Highlands Backroads Adventures	4x4 and ATV tours/self-drive on the networks of backroads in the Highlands. Will require further investigation of legal access, maintenance and liability issues.
Island-wide	Coastal Birding Trail	Develop a coastal birding trail with interpretation and sites that highlights Cape Breton's key birding locations (e.g. similar to Texas Coastal Birding Trail).
Louisbourg	Expand Harbour based activities	Develop further harbour activities and link these to the Fortress, including boat tours (historical) and other water transport.
Cape Breton	Pollett's Cove-Aspy Fault Wilderness Area	Development of Pollett's Cove-Aspy Fault wilderness hiking and interpretive trail system.

PRODUCT/MARKET MATCH ANALYSIS

It is critical that the new or enhanced tourism products be matched with the requirements of the marketplace. Products for which there is not a strong market opportunity are destined to fail, so this analysis is designed to help identify the opportunities with the best potential.

Product/Market Match Criteria

Product/market match criteria are used to evaluate the long-list of tourism development opportunities. This process determines the degree to which a particular product matches current and anticipated marketplace demand.

The criteria have been divided into three categories, as follows:

- Market
- Product

- Economic.

Each opportunity is measured against the specific evaluation criteria to determine its rating out of 120 and its priority for development within Cape Breton Island. Some criteria, because of their importance to Cape Breton's tourism industry, have been assigned significantly higher values. These include marketability, seasonality and uniqueness/authenticity.

The criteria are applied using a point system. Figure 8.7 describes each criteria and the number of points assigned.

Figure 8.7: Product/Market Match Criteria

MARKET (Total points: 40)	
Criteria	**Description of Criteria**
1. Existing Market Size (10)	Based on the historical visitation and participation data (e.g. 2000 Visitor Exit Survey) for Cape Breton, what is the existing size of the market for the proposed opportunity
2. Potential Market Size (10)	Based on the trends and market analysis conducted in Phase I of the study, is there a significant potential market for the opportunity?
3. Marketability (20)	Likelihood of positive potential image/perception of the opportunity in the marketplace and reasonable accessibility to the market. Priority has been given to opportunities that appeal to the high yield markets (e.g. US and Europe) as well as domestic tourists.

PRODUCT (Total points: 60)	
Criteria	**Description of Criteria**
1. Uniqueness/ authenticity (20)	How unique is the opportunity relative to the marketplace (regional/national/international) or how accurately and genuinely does the opportunity portray the heritage/culture of Cape Breton?
2. Seasonality (20)	What potential does the product have to extend Cape Breton's tourist season into the shoulder and winter months?
3. Resource sustainability/ potential (10)	Can the natural and/or cultural resources base sustain the proposed opportunity and are the resources adequate to enable the development of a high quality product/service?
4. Available infrastructure/facilities (10)	Are there existing facilities/infrastructure available for the opportunity and are they of an appropriate quality/standard?
ECONOMIC (Total points: 20)	
Criteria	**Description of Criteria**
1. Broad-based regional economic benefits (10)	Will the opportunity contribute broadly to development of the tourism industry in several locations or throughout the region?
2. Community participation/spin-offs (10)	Are there significant indirect spin-offs or benefits to the local communities from the development of the opportunity?

The application of these criteria is used to develop a "product potential index" for each opportunity. Based on the product/market match assessment, the opportunities with the highest product potential index have rated strongly against the majority of these criteria and represent the most appropriate, economically beneficial and marketable initiatives.

The long list also includes some opportunities that are already to some extent underway or partially established. These are likely to score more highly on criteria such as available infrastructure, reflecting the fact that significant effort in developing these opportunities has already been undertaken.

On the following pages the criteria scores and product potential indices are shown, grouped by the following categories of opportunities:

- Accommodations
- Attractions

- Cultural heritage
- Tourism infrastructure
- Outdoor adventure/ecotourism.

Results of Product/Market Match Analysis

Accommodations

The accommodations opportunities with high indices have significant market potential and the ability to offer a uniquely Cape Breton style of product.

- These opportunities provide a means of diversifying and broadening Cape Breton's current accommodation offerings.
- The accommodations opportunities that relate to new development initiatives have lower scores against criteria such as available infrastructure.
- Some concepts, such as B&B's and a backpacker hostel, would likely be created from existing properties.
- The key to differentiating these properties in the marketplace is theming, based on Cape Breton's unique cultures and natural environment.
-

Figure 8.8: Accommodations Product/Market Match Analysis

Accommodation Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Inverness Links Resort and Golf Club	7	7	18	16	14	7	4	9	9	**91**
"Safari Cape Breton" Eco-Adventure Lodge(s)	7	7	17	18	15	8	4	7	7	**90**
Hostel/backpacker lodge Chéticamp, Louisbourg	4	6	14	13	16	8	8	7	8	**84**
Ainslie Lake Campground	7	7	12	14	6	7	6	6	7	**72**
B&B, farm stay upgrades	7	7	15	15	12	8	7	5	6	**82**
RV Park – Port Hawkesbury area	7	7	12	12	8	7	5	6	7	**71**

Accommodation Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
General accommodation upgrades	7	8	13	12	14	7	9	7	7	**84**
High-end 4-5 star resort development(s)	6	8	14	12	15	7	7	8	8	**85**

Attractions

The development of key attractions opportunities will help to increase the overall visitor draw. Marquee or flagship attractions have the best potential to offer broad-based economic returns and community wide participation.

- Attractions that focus on the natural environment and/or Cape Breton's unique cultural heritage achieved the higher scores.
- Some of the opportunities relate to enhancing and upgrading existing attractions, which generally resulted in a higher score, because of the existing infrastructure and markets for these products.
- Opportunities that offered the potential to spread the economic benefits to the wider community, or could be based in regions where there is currently no anchor tourism attraction, also scored highly.

Figure 8.9: Attractions Product/Market Match Analysis

Attractions Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Cabot Trail World Class Scenic Drive	8	9	16	18	16	8	7	7	8	**97**
"Ciad Mille Failte" Welcome Centre	7	7	16	16	18	7	4	8	7	**90**

Attractions Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
"Seasons at the Fortress"	8	7	14	16	17	7	10	8	8	**95**
Highland Village Scottish theming	7	8	14	16	14	8	8	6	8	**89**
Bras d'Or Lakes Cruising	6	7	12	16	14	8	5	8	8	**84**
"We Rise Again" Festival Cape Breton	9	9	14	14	18	8	7	8	9	**96**
"Wings" Hall of Flight Attraction Development	6	7	12	18	16	8	7	6	9	**89**
Salt Water Lakes Environmental Centre, Bras d'Or Lakes	6	7	12	16	12	7	5	6	8	**79**
Unama'ki Institute, Eskasoni	7	7	12	18	15	8	7	7	8	**89**
Performing Arts Centre, Baddeck/Sydney	6	6	12	12	16	8	4	7	8	**79**
Cape Breton Paleontology Centre, Sydney Mines	6	8	12	17	14	8	6	6	8	**85**
"Men of the Deeps" Miners' Museum and Colliery Heritage District	8	8	15	18	15	7	10	7	8	**96**
Enhanced signage and programming for Salmon Museum	7	6	16	16	16	8	8	6	6	**89**
Winter Festivals	6	7	12	12	18	6	6	8	8	**83**
Fishing Village, Fleur-de-lis Trail	6	7	12	15	12	7	6	6	7	**78**
Acadian Welcome Centre, Arichat	6	7	12	17	12	7	5	6	7	**79**
Sound & Light Show, Chéticamp	6	8	17	17	14	6	6	6	8	**88**
Atlantic Canada Nature Centre and Wildlife Sanctuary	6	7	14	16	16	8	8	8	8	**91**

Cultural Heritage

Cultural heritage opportunities fit well with Cape Breton's existing and potential target markets. The most authentic cultural heritage products receive the higher scores, and these generally emphasize Cape Breton's unique Acadian, Aboriginal or Gaelic heritage.

- Many of the opportunities relate to development and enhancements of existing products and infrastructure and these also ranked highly because of the historical success of many of these products.
- Cultural festivals and events that can be staged in the shoulder and winter months and offer the opportunity to be expanded into the wider community also rank highly because of the strong economic and community benefits they offer.
- Aboriginal tourism products are fairly limited in Cape Breton to date, although there are a number of initiatives underway. Many of these rated strongly against the criteria because of the high market demand and the potential uniqueness of these products.
- The opportunity analysis identified a number of significant heritage sites in Cape Breton, many of which currently have limited interpretation and site infrastructure. These could be enhanced through signage and possibly on-site tours.

Figure 8.10: Cultural and Heritage Product/Market Match Analysis

Cultural and Heritage Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Integrated marketing program for community museums	6	7	15	15	14	7	7	7	8	**89**
Eskasoni Long House and cultural tourism products	6	7	14	18	12	8	7	8	9	**89**
Chapel Island archaeological sites and interpretation	6	7	13	16	12	7	4	6	7	**78**

Cultural and Heritage Opportunity	**Evaluation Criteria (1 = weak, 10 = strong)**									**Product Potential Index (Max = 120)**
	Market			**Product**				**Economic**		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Mi'kmaq "Time Travel" Aboriginal Cultural Experience	7	8	17	18	16	7	6	8	9	**96**
Develop Showcases & Galleries Island-wide	6	6	10	12	16	7	6	7	8	**78**
"Connexion Acadian" Cultural Experience	6	7	14	16	16	8	7	9	9	**92**
"The Celtic Celebration" Cultural Experience	6	7	14	16	16	8	7	9	9	**92**
Development of Fort Petrie – interpretive viewpoint	6	7	14	14	12	8	9	7	7	**84**
Enhanced interpretation at Battery Provincial Park	6	7	12	14	12	8	8	6	6	**79**
Indian Point site interpretation, Port Hood	6	7	12	14	10	8	7	6	7	**77**
Mabou Highlands Heritage Site	6	7	12	14	10	9	7	6	6	**77**
Louisbourg Maritime History Centre	6	7	14	14	12	7	8	7	8	**83**
Genealogy Centre, Highland Village, Iona	4	5	10	17	14	8	10	8	8	**84**
Music Centre, Judique	6	7	15	17	16	7	4	8	8	**88**
"Meet Cape Bretoners" program/package	5	6	14	19	15	8	7	7	8	**89**

Infrastructure

Principal infrastructure development opportunities are key catalysts for strengthening Cape Breton's tourism destination draw.

- The infrastructure opportunities that contribute to Cape Breton's marketability as a whole and provide broader economic benefits were the top ranked opportunities.

- Opportunities relating to provision of tourist information, including visitor centres and signage, also score highly along with some upgrades to existing infrastructure.

Figure 8.11: Infrastructure Product/Market Match Analysis

Infrastructure Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
"Conventions Cape Breton" Trade and Exposition Centre	6	7	15	14	18	7	8	8	9	**90**
Develop "sustainable communities" initiative based on Green Globe	6	7	15	14	10	8	7	8	9	**84**
"Sydney-by-the-Sea" Waterfront and Downtown Heritage	8	8	14	13	18	7	7	8	7	**90**
Enhanced signage for touring trails and attractions	8	8	16	14	14	8	7	8	6	**89**
Harbour side enhancement in Sydney and Louisbourg	6	8	16	12	12	8	5	8	8	**83**
Road shoulders and pull-outs development	10	10	14	10	14	7	8	8	7	**88**
Ferry Terminal Welcome Centres, Newfoundland	5	6	16	16	10	6	7	7	6	**79**
Fleur-de-lis Trail "Route Ancienne"	5	8	16	17	12	8	7	9	9	**91**
Highway Visitor Info Centre, Sydney	8	8	14	12	10	5	5	7	7	**76**
"e-CB" Tourism e-Commerce Development	7	9	18	15	18	8	5	9	9	**98**
Louisbourg Tour Boat Shuttle	6	8	15	14	12	7	7	8	7	**84**
Lakeside heritage trail, Bras d'Or Lakes	7	7	12	12	12	7	5	6	8	**76**
Major Marina, Bras d'Or Lakes	4	5	10	12	8	8	5	6	6	**64**
Highway 4 Touring Route	7	8	14	13	13	7	8	9	9	**88**

Packaging

Packaging opportunities should be an important focus for Cape Breton's tourism product development strategies. Packaging opportunities that focus on the shoulder and winter seasons and emphasize Cape Breton's unique natural and cultural features obtained the highest index ratings.

- The overall marketability of a particular packaging opportunity, based on the existing and potential markets, is also a significant component in the overall ranking.
- Opportunities with a broader market appeal scored highly as did those that focus on Cape Breton's natural features and unique culture.
- Many of the packaging opportunities have the ability to distribute visitors more widely throughout the Island and include some of the smaller communities.

Figure 8.12: Packaging Product/Market Match Analysis

Packaging Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	**Potential** Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Packaging Acadian products	6	6	14	16	16	8	7	7	8	**88**
Snowmobile Safari packages, Inverness County	3	4	16	15	20	9	9	8	8	**92**
Multi-Sport outdoor adventure packages (hiking, biking, kayaking, surfing, diving)	7	10	16	13	13	8	8	7	6	**88**
Build on the Le Congres Acadian 2004	6	10	18	20	10	6	8	9	9	**96**
Learning Vacations program packages	6	7	17	15	12	6	7	8	7	**85**
Marconi Trail package focused on communications heritage	6	7	14	14	12	6	8	8	7	**82**

Packaging Opportunity	**Evaluation Criteria (1 = weak, 10 = strong)**									**Product Potential Index (Max = 120)**
	Market			**Product**				**Economic**		
	Existing Market Size	**Potential** Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Colliery Trail Mining Heritage program package	5	7	14	14	12	7	6	8	8	**81**
Taste of Cape Breton Food & Cuisine packages	5	7	13	13	16	6	6	8	6	**80**
Lighthouse Packages/ stays	3	5	15	15	13	7	6	7	7	**78**
Develop Sports Tourism packaging	6	7	13	13	16	7	7	8	8	**85**
Gaelic Trail/package with Highland Village & Gaelic College as focal points	8	10	18	18	14	8	8	7	7	**98**
Educational and outdoor packages for the youth market	5	6	16	15	12	7	6	7	8	**82**
Cape North Cultural Discovery	7	8	14	16	13	7	8	8	8	**89**
Beach package vacations, Inverness County	6	7	16	12	9	7	7	8	8	**80**
Shoulder Season Events	5	7	12	12	20	7	6	8	8	**85**
Northern Scuba Diving Packages	5	6	13	13	12	8	8	7	7	**79**

Outdoor Adventure/Ecotourism

Outdoor adventure/ecotourism opportunities capitalize upon Cape Breton's world-class natural environment. The Island has a number of excellent outdoor adventure/ecotourism activities (e.g. - whale watching, birding); however, there are a number of other outdoor activities (e.g. – hiking, cycling) that could be further expanded into quality adventure products.

- The emphasis on seasonality in the criteria has resulted in winter and shoulder season outdoor products scoring highly, although their existing and potential market size is relatively modest.
- Other outdoor opportunities that scored well in the product-market match analysis were focused on Cape Breton's unique natural features and appeal to broad-based target markets.
- Some investment in infrastructure (signage, trails, huts) is required to establish a number of the nature-based initiatives. However, the end result will enable the development of quality products offering unique experiences.

Figure 8.13: Adventure/Ecotourism Product/Market Match Analysis

Adventure/Ecotourism Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Develop shoulder season fishing product	5	7	16	17	17	8	6	6	6	**88**
Mapping of snowmobile trails and development of infrastructure, Inverness	3	5	12	14	18	7	6	7	7	**79**
"Trails for All Seasons" Development Plan	10	10	15	14	12	8	6	7	9	**91**
Winter camping/survival packaging concept	2	3	13	17	20	8	7	6	6	**82**
Develop hut network to enable multi-day hut-to-hut hiking and ski touring (Cape Breton Highlands)	7	8	17	18	11	8	3	7	7	**86**
Guided wreck scuba diving, Louisbourg	1	2	13	16	8	7	5	6	5	**63**

Adventure/Ecotourism Opportunity	Evaluation Criteria (1 = weak, 10 = strong)									Product Potential Index (Max = 120)
	Market			Product				Economic		
	Existing Market Size	Potential Market Size	Marketability	Uniqueness/ Authenticity	Seasonality	Resource Sustainability	Available infrastructure	Economic Benefits	Community Participation	
Tour Boat Operations (Baddeck, Sydney, Inverness, Louisbourg)	7	8	15	14	12	7	5	7	8	**83**
Further Sea kayaking product –both inland and coastal	2	6	16	14	9	9	8	7	6	**77**
"A Passage East" Cape Breton Eco-Cruise	7	7	16	18	12	8	6	8	8	**90**
Wilderness interpretation tours/excursions	10	10	14	14	13	7	6	6	6	**86**
Enhance non-motorized winter products	3	5	12	16	20	7	6	6	6	**88**
Highlands Backroads Adventures	6	7	14	14	16	6	9	6	6	**84**
Cape Breton Coastal/Bras d'Or Lakes Birding Trail	8	8	15	17	12	8	6	7	8	**89**
Develop further harbour activities, Louisbourg	8	8	14	12	12	8	9	7	6	**84**
Pollett's Cove-Aspy Fault Wilderness Area - hiking	6	8	14	13	13	7	8	7	8	**84**

CONCLUSIONS

The best opportunities as determined by the product/market match process represent a mix of unique accommodation developments, enhancements to Cape Breton's icon attractions, integrated grouping and branding of cultural products, enhancement of existing infrastructure, and new visitor services. The following opportunities scored well against the designated criteria and represent the best short-term opportunities for Cape Breton.

Accommodations

- Inverness Links Resort and Golf Club

- "Safari Cape Breton" Eco-Adventure Lodge(s)

Attractions

- Cabot Trail World Class Scenic Drive
- "Ciad Mille Failte" Welcome Centre
- "Men of the Deeps" Miners' Museum and Colliery Heritage District
- Atlantic Canada Nature Centre and Wildlife Sanctuary
- "We Rise Again" Festival Cape Breton
- "Wings" Hall of Flight Attraction Development
- "Seasons at the Fortress"

Cultural Heritage

- Mi'kmaq "Time Travel" Aboriginal Cultural Experience
- "Connexion Acadian" Cultural Experience
- "The Celtic Celebration" Cultural Experience

Infrastructure

- Fleur-de-lis Trail "Route Ancienne"
- "e-CB" Tourism e-Commerce Development
- "Conventions Cape Breton" Trade and Exposition Centre
- "Sydney-by-the-Sea" Waterfront and Downtown Heritage

Outdoor Adventure

- "Trails for All Seasons" Development Plan
- "A Passage East" Cape Breton Eco-Cruise

9 – VISION AND OVERALL DEVELOPMENT STRATEGY

With a clear understanding of the markets, tourism trends, resources potential and key opportunities, it is possible to articulate the vision and key strategies for the Tourism Road Map.

THE DESTINATION DEVELOPMENT PLAN – CAPE BRETON'S TOURISM ROAD MAP

The key strategic components of the plan are described in this chapter and include:

- A vision for Cape Breton's tourism sector – a "tourism economy"
- The overall goal – to increase tourism revenues to $400 million by 2008
- Three strategic thrusts of the Destination Development Plan – these outline the activity of the plan and create the "framework" for collaborative action.

The chapters that follow in this report will then describe in detail elements of the overall implementation plan.

- Chapter 10 describes in detail the priority opportunities that have been identified for development in the near term and how they support the strategic thrusts.
- Chapter 11 describes the organizational plan that facilitates implementation and is needed to initiate the marketing and product development activities – a partnership model.
- Chapter 12 describes the marketing and product development (including packaging and human resources development) components of the Tourism Road Map plan. These components support the vision, overall goal and the three strategic thrusts of the Destination Development Plan.

Vision for Cape Breton's Tourism Sector – A Tourism "Economy" that Engages the Community Broadly

The overall vision for the tourism sector in Cape Breton needs to help the many types of organizations involved to define a common future. All three levels of government (federal, provincial and municipal), associations, large and small enterprises, and volunteer groups play roles in Cape Breton's tourism industry. The vision *must inspire partnerships and leverage the* *momentum of key partners* like the Nova Scotia Tourism Partnership Council, the industry, the Cape Breton Growth Fund and others.

Cape Breton's identity helps define the vision, which should incorporate the following elements:

- A need to focus on nature, heritage, and culture under a vision that defines Cape Breton's tourism future
- Recognizes the stalwart nature of Cape Bretoners – an Island people with a proud history
- Culture – few other Islands in the world have the opportunity to rise economically on the strength of music and culture.

The tourism vision must harness the planning and momentum of many organizations. The vision should also encourage the tourism sector to work closely with and leverage other emerging sectors in Cape Breton – such as information technology and arts and culture.

Vision for Cape Breton's Tourism Sector
"We will build a tourism economy in Cape Breton that engages all stakeholders affected by tourism and distributes benefits throughout the Island. By enhancing/creating attractions and experience-based packages, and effective marketing channels, we will bring long-term revenue growth to the tourism sector in Cape Breton. By sharing our identity with visitors we build the pride and confidence that will power Cape Breton's economy into the 21st century."

The Nova Scotia Tourism Partnership Council Vision recommendations, provide current and useful context for this plan. To get maximum traction, the tourism development plan for Cape Breton must leverage the direction of the industry at large in Nova Scotia. There are a number of initiatives in the Tourism Road Map that support or leverage the themes outlined by the Nova Scotia Tourism Partnership Council 's Vision (Fall 2002) including:

- The goal is revenue – for the first time both Cape Breton *and* Nova Scotia have a specific revenue target
- Change – tourism stakeholders need to prepare to accept changing roles and responsibilities
- Success measured by revenue growth *and* our ability to work together

- New star generators needed (see priority opportunities in Chapter 10)
- Performance based marketing
- More focus on research
- More focus on e-marketing.

The Nova Scotia vision (like the Cape Breton Tourism Road Map) is a catalyst for growth – it will not do everything, but will provide direction and encourage partnerships.

Overall Goal

The major challenge for the "Tourism Road Map" is to dramatically increase tourism revenues from $230 million to $400 million by 2008. This goal has been developed in concert with the Cape Breton Tourism Industry Task Force. It is consistent with the goal of the provincial tourism industry in Nova Scotia. The Tourism Partnership Council, Destination Halifax and other regions are driving toward revenue increases as a measure of success over the next 5-10 years. This alignment of goals will enable more co-ordinated focus and effort among partners.

Getting to the Goal – How will we Achieve this Revenue Goal?

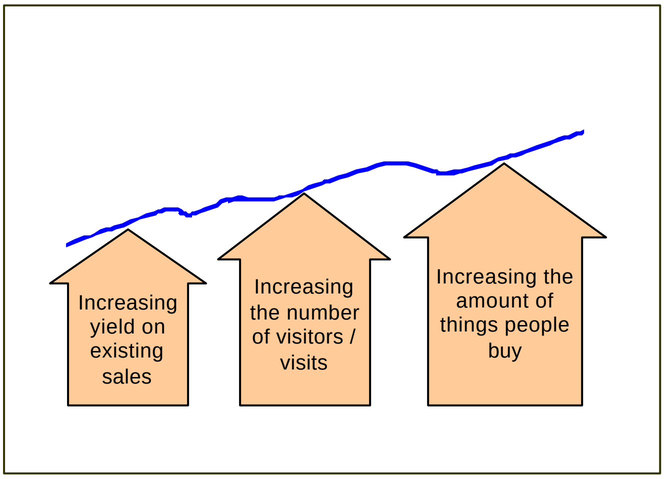
The following key objectives will guide product development and marketing activity. All development opportunities, package development, marketing and organizational activity should use these as a test – are we doing "one or more of these" as we develop a new project idea, work on a package or organize working groups? They will be seen again in Chapter 12, the Marketing and Product Development Plan, where they will be used to define incremental revenue objectives.

These key objectives are designed to increase revenue from tourism, as shown in Figure 9.1 and described below:

1. **Increase the number of visitors to Cape Breton.** Develop programs that *increase visitor counts* including off-season, shoulder season and return visits from the regional market.
2. **Increase the yield.** Through improved market information a stronger use of bookings data, pricing and packaging strategies, industry will be able to ***charge a higher price*** in keeping with value and market demand. Product enhancements will also result in increased yield.

3. **Increase the amount of money each visitor spends by *purchasing more goods and services***. Packaging and cross selling with neighbouring businesses will increase the length of stay and total expenditures.

Figure 9.1: Three sources of Increased Tourism Revenues



Principal Strategic Thrusts

The "Road Map" is a "system" that integrates the following three overall strategic thrusts:

1. **Enhance and develop strategic infrastructure.** Developing strategic opportunities that lead to the spatial development of various parts of Cape Breton – gateway, hub/spoke and touring route "infrastructure." This encompasses the development of actual facilities and hard infrastructure, as well as programming.
2. **Integrated effort of sector partners.** It is essential to create a partnership framework that allows many organizations and groups from the public, private and volunteer areas to work on common interests.
3. **Aggressive packaging, sales and marketing.** Creating packaged product that will move visitors around the island and extend their stay and creating marketing programs that take this product to market and sell, not just promote.

Over the next five years key elements of the tourism sector will work together as a coalition to build the destination. A variety of infrastructure and programming projects undertaken by various groups will all seek to build or improve Cape Breton's product base, develop packages and take them to market using collaborative methods.

The three strategic thrusts along with the components of each are explained in more detail on the following pages.

1. ENHANCE AND DEVELOP STRATEGIC INFRASTRUCTURE

Based on product and market needs identified, it is essential that Cape Breton enhance its tourism product base and key infrastructure.

Transportation Infrastructure Upgrading is Critical

The Road Map is a Destination Development Plan that focuses on practical things that will be done by key partners, over the next several years. Bigger than the tourism sector, however, is the issue of transportation infrastructure – specifically roads. Recent market and trends data show us that road travel will grow dramatically in the near term and will still be by far the most important transportation access mode for visits to Cape Breton over the next few decades.

Excellent roads are a transportation requirement, but also a tourism product requirement – so much of the product we will develop over the next few years will be road based. An overall objective of the Road Map is to move people around the Island and get them to stay longer. Upgrading the Cabot Trial, completion of the Fleur de Lis Trail and general improvement of roads are critical to increasing annual tourism revenues by *hundreds of millions of dollars* over the next several years. We call upon all levels of government to make the improvement of roads as strategic an issue for Cape Breton as the Tourism Road Map Destination Development Plan itself.

Product Quality is also Critical

Enhancement and development of tourism infrastructure implies upgrading and development of built tourism attractions and other facilities such as accommodations, visitor information centres, restaurants, museums, galleries, passenger transportation terminals and tourist oriented retail outlets (e.g. craft shops). It is absolutely essential that any such upgrading or new developments be designed in a manner which meets the quality expectations of the marketplace.

The physical quality of any tourism development relates to such attributes as:

- Appropriateness of siting and viewscapes
- Suitability of the exterior design to the natural and/or built surroundings (e.g. use of natural materials such as wood and stone and/or traditional architectural motifs)
- Exterior signage and landscape design
- Adequacy of site access, egress and parking
- Appropriateness of interior design and the standard of finishings, fixtures and furnishings used
- Size and functionality of the proposed layout of the building(s) relative to the proposed uses (e.g. – if catering to motorcoach tours, can a full size highway motorcoach pull up to the front entrance and unload and is there enough space in the building's lobby or reception area to handle this group size).

Too often tourism attractions and facilities fail because they are poorly designed and/or maintained, with the result that the physical quality does not meet marketplace expectations. It is important that any upgraded or new tourism infrastructure implemented as a result of this Tourism Road Map plan is developed to a very high quality which is essentially "world class", meeting or exceeding international marketplace standards.

Determining Strategic Infrastructure Needs

Decisions about what is strategic can be made based on an analysis of product life and approximate to spatial development.

1. *Analysis of product life cycles*. This analysis helps us make decisions about which product categories have the most promise. The first and second level priority development opportunities that result from this and other analysis are outlined in Chapter 10.
2. *Spatial development strategies*. These strategies focus on various types of projects that deal with geographic development of the Island – the need to move people around more. They include three different development approaches – "gateway", "hub and spoke" and "touring route/circuit" development. In Chapter 10 we note how each of the priority development opportunities support these spatial development concepts and the three overall strategic thrusts of the Road Map.

Analyzing Tourism Product Life Cycles to Determine Infrastructure Requirements

Accommodations, attractions, natural and cultural resources were reviewed and assessed as a prelude to defining products for further development, as described in earlier chapters of this report.

Stimulating Island-wide growth is a key requirement of the Cape Breton Tourism Road Map. Overall destination development will involve the creation of developments that fall into various categories. The product life cycle analysis undertaken in this study helps us understand which products have the most potential. We have analyzed the product life cycle stage for various tourism products, under the following three categories:

- Accommodations
- Attractions
- Outdoor adventure/Ecotourism.

A specific tourism product line's position on the product life cycle chart is a reflection of a number of factors including:

- Market readiness, standard/quality of product, and stage of development.
- In some cases there are obstacles to overcome and opportunities to develop before the tourism product can realize its full potential or revitalize itself into a period of growth again.

We have recognized four distinct stages in the product life cycle, each of which has different implications for growth and development.

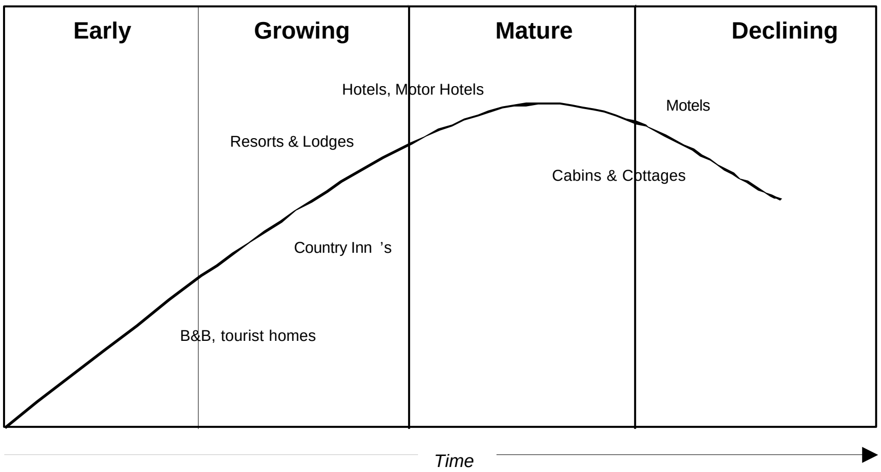
- Early – from start-up to a period of rapid growth and development.
- Growing – the prime growth stage in the product's life cycle.
- Mature – where growth is vastly diminished and market penetration plateaued.
- Declining – where reduced sales/revenue is experience and some major redevelopment or expansion is usually required to return to the growing stage.

Accommodations

Accommodations have been analyzed according to their stage in the product life cycle. The majority of Cape Breton's accommodation inventory is well positioned to capitalize on increased visitation and is either growing or mature in terms of the product life cycle, as shown in Figures 9.2 and 9.3.

Motels, cabins and cottages are the exception and many of these require significant upgrading and maintenance to meet current marketplace expectations, as they are at the late mature, or declining stage.

Figure 9.2: Accommodations Product Life Cycle



Source: Study Team Analysis

Figure 9.3: Accommodations Product Life Cycle Stage, Rationale and Development Implications

Type	Life Cycle Stage	Rationale	Development Implications
Resorts & Lodges	Growing	▪ There has been significant upgrading and maintenance of properties in this group in recent years ▪ This segment contains many of Cape Breton's icon properties	▪ Some infrastructure and programming enhancement needed to sustain growth ▪ Spa and related health services are an example
Hotels, Motor hotels	Growing to mature	▪ Properties generally in good condition with significant new product and recent improvement of existing facilities	▪ Packaging and partnering with outdoor and cultural activity operators will further increase growth in this segment
Motels	Declining	▪ Maintenance and upgrading is needed to bring many of these properties in line with market expectations	▪ Obtaining finance for capital improvements and maintenance is a key issue

Type	Life Cycle Stage	Rationale	Development Implications
Country Inns	Growing	▪ This group contains a mix of mature properties and some new facilities ▪ Country Inns fit well with Cape Breton's rural and cultural image	▪ Increasing activities and product offerings to visitors will enhance the growth potential
Cabins & Cottages	Mature to declining	▪ A significant portion of this product group requires upgrading to meet market expectations ▪ There have also been a number of new additions	▪ Many facilities are run on a part-time basis, which limits development options ▪ Obtaining financing for capital upgrades can be difficult
Bed & Breakfasts and Tourist homes	Early to growing	▪ Many of the properties in this segment are new to the tourism industry ▪ Demand for a more exclusive vacation experience will continue to increase	▪ Enhanced packaging and a wider selection of products and services would increase the growth potential ▪ The part-time nature of many properties can limit the development potential

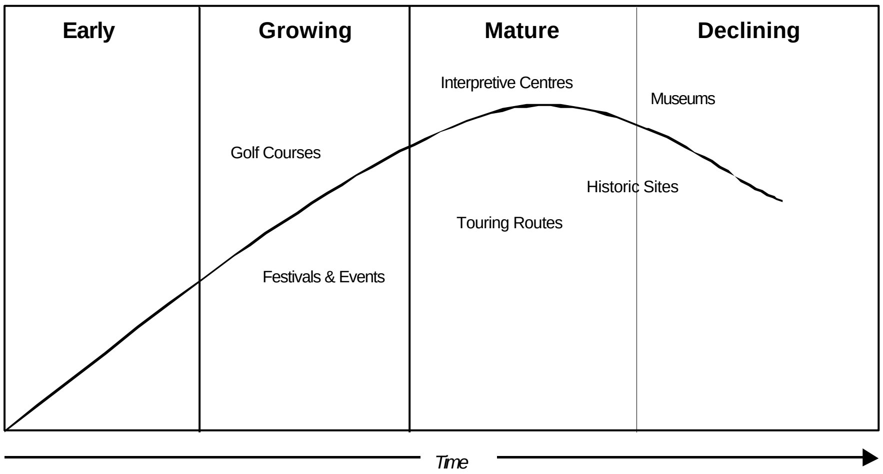
Source: Study Team Analysis

Attractions

Cape Breton has a number of icon attractions that form the focus of visitor experiences. However, some are in the later stages of maturity while others have begun to decline, as shown in Figures 9.4 and 9.5.

- Many of the Island's museums and historic sites have experienced a decrease in visitation over the last couple of years.
- Attractions such as golf and Cape Breton's unique festivals and events are still in the early stages of the growth cycle and offer significant potential.

Figure 9.4: Attractions Product Life Cycle



Source: Study Team Analysis

Figure 9.5: Attractions Product Life Cycle Stage, Rationale and Development Implications

Type	Life Cycle Stage	Rationale	Development Implications
Museums	Declining	▪ Visitation to museums has declined in recent years ▪ Some facilities require upgrading and maintenance	▪ Opportunities for private sector to become involved could enhance the appeal ▪ Guided tours, interactive displays and seasonal exhibits can boost the appeal ▪ The community nature of many facilities can lead to funding and support issues
Historic Sites	Mature to Declining	▪ Visitation to historic sites has been fairly static over the last few years and in some cases declining	▪ Enhanced interpretation programs, new events, activities and displays could revitalize many of these sites ▪ Community and private sector participation could revitalize growth
Interpretive Centres	Mature	▪ Some of the newer facilities are still in the growth stage, while the more mature facilities are either static or declining	▪ Revision of programming, linking with local events and updating of displays could enhance visitation ▪ Volunteer staffing and lack of revenue generation are potential issues

Type	Life Cycle Stage	Rationale	Development Implications
Golf Courses	Growing	▪ A number of excellent courses and packaging initiatives (e.g. the "Fabulous Foursome") have contributed to growth in this segment	▪ Potential to enhance existing product with new championship course in another part of the Island ▪ Need for upgrading facilities and services at some of the Island's lesser known courses
Festivals & Events	Growing	▪ Celtic Colours International Festival continues to attract large numbers of visitors ▪ There is a substantial number of other festivals and events throughout the Island	▪ Events staged in the shoulder and winter seasons could entice visitors on a year-round basis ▪ Further coordination of smaller events to create larger scale themed festivals would be of benefit
Touring Routes	Mature	▪ Well established circular routes contribute to the Island's appeal (e.g. Cabot Trail) ▪ The majority of visitation is via automobile and touring routes, so will continue to play a key role	▪ Uneven distribution of traffic throughout the Island and a heavy emphasis on the popular Cabot Trail ▪ Need for theming of areas and regions on secondary touring routes to increase their appeal

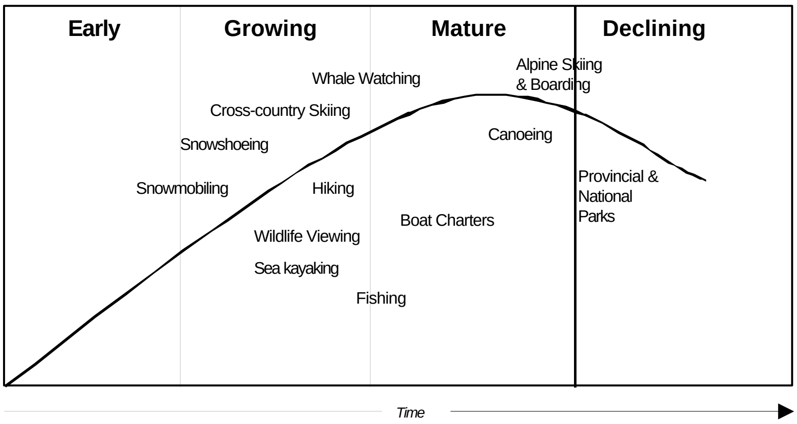
Source: Study Team Analysis

Outdoor Adventure/Ecotourism

Cape Breton has a wealth of natural resources and features that lend themselves to outdoor adventure and ecotourism. However, many of these products are still relatively new in terms of the product life cycle (see Figures 9.6 and 9.7) and significant potential exists to build and capitalize upon Cape Breton's natural resources in a sustainable manner.

Many outdoor activities such as wildlife-viewing, hiking and sea kayaking hold significant potential for Cape Breton. However, visitation to provincial and national parks has been static or declining over the last few years and will require development and marketing initiatives to revitalize growth.

Figure 9.6: Outdoor Adventure/Ecotourism Product Life Cycle



Source: Study Team Analysis

Figure 9.7: Outdoor Adventure/Ecotourism Product Life Cycle Stage, Rationale and Development Implications

Type	Life Cycle Stage	Rationale	Development Implications
Wildlife Viewing	Growing	▪ Significant growth potential, especially in birding ▪ Numerous species on Cape Breton (e.g. moose, deer, pine marten, lynx and fox) of interest to nature enthusiasts	▪ Need for improved access to the nature resources ▪ Availability of knowledgeable local guides and operators ▪ Enhanced interpretation infrastructure to help visitors experience the flora and fauna
Whale-watching	Growing to mature	▪ One of the Island's most established ecotourism products is nearing maturity ▪ Significant resource (up to 8 different species of whale)	▪ Continue to promote as a premier ecotourism activity ▪ As this eco-activity reaches maturity, sustainability will become a more important issue
Hiking	Growing	▪ Excellent hiking product in the Cape Breton Highlands National Park ▪ Great potential for further coastal, lake and river trails	▪ Continued access to the natural environment is critical ▪ Maintenance of existing trails, development of new trails and supporting infrastructure needed ▪ Community based management of trails and need for development funding

Type	Life Cycle Stage	Rationale	Development Implications
Sea Kayaking	Growing	▪ Ease of use and suitability to the Island's coastal and inland waters make this a popular activity ▪ Also used as mode of transport for wildlife viewing	▪ Establishing safe paddling routes and regulations ▪ Accommodation packages and partnerships with other outdoor operators to offer a more diversified product
Canoeing	Mature	▪ While still a popular activity, participation levels have been fairly static over the last few years	▪ Establishment and promotion of new canoeing routes (e.g. heritage routes) ▪ Expand interpretation and packaging to enhance overall experience
Provincial & National Parks	Mature to declining	▪ Visitation to parks has been static/ declining over the last few years ▪ Tighter provincial and federal budgets have made capital improvements difficult	▪ Enhancement of facilities and services, where appropriate, locating on park boundaries and outside where possible ▪ Partnerships with local communities and groups for delivery of programs, maintenance and management.
Alpine Skiing & Boarding	Mature	▪ Visitation has been fairly static. Overall there has been a decline in skiing numbers and an increase in snowboarding	▪ Facility and equipment enhancements and additional programming at ski hills may revitalize vi sitation
Cross-Country skiing	Growing	▪ Continues to attract outdoor enthusiasts as a form of winter exercise ▪ Combines well with other ecotourism activities	▪ Access to well-groomed trails and infrastructure ▪ Community nature of many Nordic organizations creates funding and management challenges
Snowshoeing	Growing	▪ A growing winter sport that is easy and fun ▪ Combines well with other ecotourism activities	▪ Flexible terrain and minimal facilities requirements make this a relatively easy opportunity to develop
Snowmobiling	Early to growing	▪ Significant growth in snowmobiling over the last decade ▪ Relatively under-developed on the Island from a tourism perspective	▪ Designated trails usually maintained by regional clubs where funding can be an issue ▪ More packaging with accommodations and other service providers is needed

Type	Life Cycle Stage	Rationale	Development Implications
Fishing	Mature to declining	▪ Participation in fishing has remained static over the last few years. ▪ Niche segments such as salmon and fly fishing remain popular and hold incremental potential	▪ Enhanced links between interpretive facilities, other infrastructure and the resource. ▪ Enhanced packaging of the Island's excellent fishing products and resources
Boat Charters	Mature	▪ An important component of the Island's outdoor product ▪ Growth fairly static over the last few years	▪ Facility upgrades and further packaging of charter experiences with other water and land based activities

Source: Study Team Analysis

In conclusion, what does this analysis tell us about these key components of infrastructure that will help us develop strategic priorities?

Accommodation:

- Most existing accommodations are either growing or mature in terms of product life cycles, so are generally well positioned.
- However, there are concerns about the ageing product base in the motel segment.

Attractions:

- Traditional attractions need rejuvenation/expansion of programming
- New attractions are needed which will draw visitors to Cape Breton and to less developed areas of the Island.

Outdoor/adventure/ecotourism:

- There is a significant resource in Cape Breton and a ready market
- Most products are at the early stage of the product life cycle, which is good news
- Limited product is currently available for this market, however, which is the bad news
- Coordinated and cooperative private sector marketing is needed to revitalize growth for existing products.

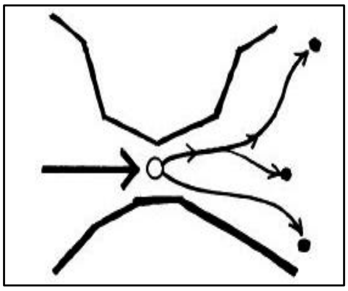
This analysis was used when identifying the priority development opportunities described in Chapter 10.

Spatial Development Strategies

Stimulating the Island-wide growth of the Cape Breton tourism industry is a key to the success of the "Tourism Road Map". Opportunities that provide a mix of larger-scale attractions and smaller more community-based initiatives enable Cape Breton's tourism experience to be delivered through a diversity of different products and services, based on three different development approaches: "gateway", "hub and spoke", and "touring route/circuit" developments, as illustrated in Figures 9.8, 9.9, and 9.10 and described in the following paragraphs.

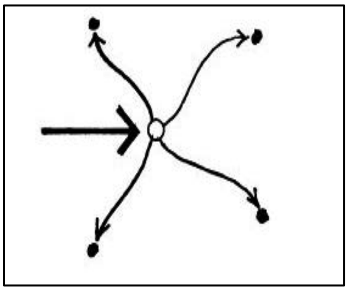
Gateway developments – A gateway development provides a "one-stop" shopping and entry point for visitors to a destination area. The experience should educate visitors about the destination they are exploring and provide the opportunity to sample products and services.

Figure 9.8: Schematic of Gateway Development Travel Patterns



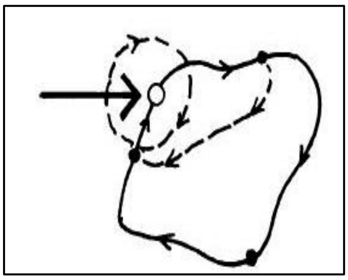
Hub and spoke developments – This style of development generally centres on larger communities or attractions that already contain significant infrastructure. These then act as a focal point from which visitors can experience smaller communities, services and products in the surrounding area.

Figure 9.9: Schematic of Hub and Spoke Travel Patterns



Touring route/circuit developments – This form of development enables communities and operators located along a touring route and adjacent, to participate and partner in the delivery of tourism products and services.

Figure 9.10: Schematic of Touring Route Travel Patterns



The short-listed opportunities identified in Chapter 10 utilize all three of these development formats and enable both large and small communities to participate in the development of Cape Breton's tourism industry.

2. INTEGRATED EFFORT OF SECTOR PARTNERS

The Tourism Road Map needs to go well beyond identifying strategic product development and infrastructure requirements and answer the question: how will we organize the implementation of the Road Map?

The research of this study indicates that more than thirty *types* of organizations are active in the tourism sector in Cape Breton. This strategic thrust puts emphasis on collaboration. Perhaps the biggest challenge of the Road Map is not identifying market opportunities or ways to get to the $400 million goal, but rather creating a real collaboration of effort among all active organizations and many individuals involved in Cape Breton tourism.

Collaboration and a belief in a common goal are critical to success. As one Task Force member has put it, we need " trust and understanding " in order to move forward together. Many organizations have played a variety of tourism industry roles in the past. There are still many different perceptions of what roles should be played by which organization. What is not in dispute is that collaborative effort – team work – is the only way to achieve the goal and the vision of the Tourism Road Map.

Implementation will Encompass Three Key Components

A number of simultaneous activities will move the Road Map forward. Some of these will move quickly, others will take time and still others will never stop. Greater detail around organizational issues and implementation steps can be found in Chapter 11. In short, implementation will involve the following three components:

1. The proponents for key infrastructure and product development projects will implement appropriate strategic projects, such as those outlined in Chapter 10. These proponents will develop partnerships and work with appropriate funding partners.

2. A broad Cape Breton Tourism Partnership of stakeholders from the three levels of government operating in the sector, industry and communities, needs to build the collaboration model that will leverage the efforts of all to achieve the revenue goal. (This model is outlined in Chapter 11.)

3. The new Cape Breton Tourism Partnership will identify funding sources to support a permanent destination marketing program for Cape Breton, which will undertake ongoing product development and marketing activities (the overall Marketing and Product Development Strategy is outlined in chapter 12). The Partnership will evolve to encompass a professional management group for the destination marketing program.

3. Aggressive Packaging, Marketing and Sales

After building new attractions, implementing other projects, and working hard to package experiences into new products, good professionally managed marketing will be critical for the success of the Road Map.

The Marketing and Product Development Plan in Chapter 12 will outline in detail the activities planned for product development (primarily packaging and human resources development) and marketing. The following paragraphs describe this strategic thrust.

Target Market Categories

There are four fundamental target market categories to be addressed as we focus our packaging and marketing activity in the future. They align well with the provincial and national approaches for tourism development and marketing and with the product analysis done to date in the Road Map. They are as follows:

- Grand Touring
- Culture and Heritage
- Outdoor and Nature
- Convention, Meetings and Events

More information on each of these target market categories is provided in Chapter 12 of this report.

Destination Marketing Program

A new destination marketing program could be considered that would implement product development (packaging primarily) and marketing activities that are aggressive, focused and professional. It will facilitate the creation of packaged products that will move visitors around the Island, as one of its two major areas of focus. It will do this work in concert with its partners Island-wide, and at the community level with municipal partners.

Creating core and partnership marketing initiatives will be the marketing program's major area of focus.

In the near term, a clear focus on targeted opportunity markets will make the investment pay off. It is important to note that developing new products and packages, or even getting better organized, will not alone bring the kind of revenue increases required by the Task Force. Best practices in North America show that consistent marketing investment is also a fundamental part of the effort.

Innovative new sources of funding will need to be explored in an open-minded way, perhaps even including a hotel levy and a Causeway levy. These are both excellent sources of funds for destination marketing and are consistent with funding methods used elsewhere in Canada.

Even with this, however, much of the marketing activity (beyond core destination marketing activity) will revolve around partnership projects that are undertaken with Destination Marketing Program funds and matching partner dollars. This is the de facto partnership model that exists in Canada today and ensures that the organizations investing the money are making many of the key decisions.

The details of the implementation plan related to packaging and marketing/sales are outlined in Chapter 12 of this document.

10 – PRIORITY DEVELOPMENT OPPORTUNITIES

We have further evaluated the opportunities outlined in Chapter 8 in the context of the overall tourism development strategy presented in Chapter 9, in order to identify priority development opportunities for Cape Breton.

These represent key catalyst opportunities and should be high priorities for Cape Breton over the next few years – the intent is that they will help to stimulate significant spin-off tourism development activity.

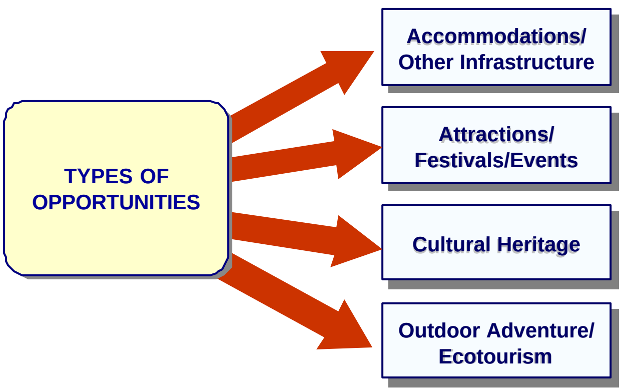
DETERMINING THE PRIORITY OPPORTUNITIES

A critical consideration in this process is each opportunity's contribution to the overall "Tourism Road Map" revenue goal.

The selected priority opportunities should be able to stimulate the overall development of Cape Breton as a tourism destination and actively contribute to the industry's goal of generating $400 million in annual tourism revenues by the year 2008.

Several categories of opportunities were identified, as shown in Figure 10.1.

Figure 10.1: Categories of Opportunities



Tourism Road Map Criteria

All of the opportunities gathered through the Road Map process were assessed on their potential to help the tourism sector strategically. A number of filters were used for this analysis. The best opportunities (product potential indexes of 90 points or above) selected on the basis of the product/market match assessment of Chapter 8 were then required to address the following criteria, in order to determine the highest priority short term development opportunities:

- **Island-wide participation/impact** – the opportunities should seek to enable a larger number of communities and entrepreneurs to participate in Cape Breton's growing tourism industry. While centres such as Sydney and Baddeck are important as gateways and hubs, smaller communities should also participate strongly in the delivery of tourism products and experiences.
- **Address culture and/or nature product positioning** – the opportunities should reflect Cape Breton's overall strengths, which centre on the local culture/heritage and the natural environment. Developments based on these themes should enable the tourism industry to create unique/authentic products and services, which are Cape Breton specific.
- **Address seasonality** – opportunities with specific potential to be year-round or at least extend well into the spring and fall shoulder seasons are a priority.
- **Geographic representation** – the priority initiatives should provide development opportunities for various regions of the Island. By creating or enhancing attractions in different regions, communities should have the opportunity to provide complementary products and services.
- **Fulfil one or more specific development roles** – act as gateway, hub, or touring route, all of which stimulate Island wide travel.
- **Have momentum/clear proponents in place** – this is critical for the first level priority opportunities, as these are initiatives which need to move ahead in the short term in order to be catalysts and create the momentum for the overall strategy.
- **Have a direct impact on the overall revenue goal** – this can be achieved in part by having a focus on high yield markets.
- **Diversity** – The selected development priorities represent a range of activities, facilities, attractions and services. They include a variety of

developments from new larger-scale attractions or enhancements of existing attractions, to smaller community-based development projects.

- **Complementary to existing infrastructure, products and services** – the opportunities will advance Cape Breton's existing tourism products and services base. Building on the Island's key attractions (e.g. Cape Breton Highlands National Park, The Cabot Trail, Fortress Louisbourg and Alexander Graham Bell Museum) is a key focus. This is important for all areas of Cape Breton, as these icon attractions draw people to the island who can then be encouraged with specific marketing programs to spread out to less travelled areas.

The priority development opportunities outlined in this chapter are grouped into the four categories noted earlier, as follows:

Accommodations and Other Infrastructure

- Cabot Trail World Class Scenic Drive
- "Ciad Mille Failte" Welcome Centre
- "Conventions Cape Breton" Trade and Exposition Centre
- "e-CB" Tourism e-Commerce Development.
- Fleur-de-lis Trail "Route Ancienne"
- Inverness Links Resort and Golf Club
- "Sydney-by-the-Sea" Waterfront and Downtown Heritage

Attractions, Festivals and Events

- Festival Cape Breton
- "Men of the Deeps" Miners' Museum and Colliery Heritage District
- "Seasons at the Fortress"
- "Wings" Hall of Flight Attraction Development

Cultural Heritage

- "Connexion Acadien" Cultural Experience
- Mi'kmaq "Time Travel" Aboriginal Cultural Experience
- "The Celtic Celebration" Cultural Experience

Outdoor Adventure and Ecotourism

- Atlantic Canada Nature Centre and Wildlife Sanctuary
- "Passage East" Cape Breton Eco-Cruise
- "Safari Cape Breton" Eco-Adventure Lodge(s)
- "Trails for All Seasons" Development Plan

It is worth mentioning again that there are many additional good community-based ideas and initiatives that are not of primary strategic importance to the Road Map process, but play secondary or support roles and greatly assist in "building out" the product base, particularly in the area of packaging. Communities and groups should be encouraged to work ahead on their projects and plan to leverage the momentum being created by the priorities identified here.

On the following pages we have provided more details regarding each of the above priority opportunities including a basic description of the opportunity, the potential components, and recommendations for initial implementation.

ACCOMMODATIONS AND OTHER INFRASTRUCTURE

Fundamental infrastructure enhancement and development is a core component of the overall destination development plan. Seven key infrastructure projects have been identified as priority development opportunities and discussed on the following pages (listed in Alphabetical order).

Cabot Trail World Class Scenic Drive

(Destination development role - Hub, Touring route)

The Cabot Trail is the single biggest historical icon in the Cape Breton tourism inventory. Recent market data shows that road traffic is up in Canada and this is likely to be a permanent market shift, as the access and safety of air travel is in question. The vast majority of Cape Breton's current and future customers will come by road. Grand touring will remain the biggest single draw for visitors in the decades ahead. The trail must be rejuvenated and enhanced in order to regain its role of senior natural attraction. We must improve and protect the trail and market it ever more aggressively. Visitors attracted by touring trail can be encouraged to explore other, less travelled areas of the Island.

The Cabot Trail needs to be treated as a product, possibly by forming a Cabot Trail Commission, an idea that has already been given some consideration.

In terms of the infrastructure (quality of roads and shoulders, etc.), there are already communities on the Cabot Trail that are organizing their citizens regarding the roads issue. This ideally should be repeated in all the communities around the Cabot Trail and any others that recognize the importance of this icon for the Island and Nova Scotia. To date the Cabot Trail has not been included in the sophisticated upgrading of roads going on in the rest of the province. It may be appropriate to raise the Cabot Trail to the height of a Product Club under the Canadian Tourism Commission.

Concept	• Rebirth of the Trail, positioned as the leading scenic drive in North America • Establishment of a major sense of entry near both the western and eastern entrances to the Trail with appropriate signage and interpretive viewpoints • This would help to recognize its Icon status for Cape Breton, Nova Scotia, Canada and the world • Pursuit of Cabot Trail Commission concept, to promote long term development of the trail's potential. • Commitment by all levels of government to undertake an infrastructure upgrading program (repaving, wider lanes, paved shoulders, orientation pavilions with washrooms) that positions the Trail for the next few decades
Rationale	• Already there is 50 years of investment in Trail with proven draw from key markets • Legitimate positioning as one of the most scenic drives in North America • More sophisticated visitors require more and better infrastructure • Responsibility of all three levels of government

Components	• Selected paving and widening to enable cyclists to use paved shoulders • Major orientation/interpretative locations with public washrooms and picnic area near the south trail entrances (east and west sides) where there is currently no welcome or sense of arrival and no interpretation/public facilities for many miles • Better Trail signage throughout • Highway frontage development guidelines to maintain attractive appearance in developed areas and natural setting in undeveloped areas • Several additional scenic viewpoints with interpretive plaques, picnic areas and public washrooms
Potential Partners	• Government provides some funding for Cabot Trail interpretation/welcome centres • Provincial and federal governments provide funding for infrastructure upgrades • Parks Canada provides liaison re park linkages • Communities partner in the development and maintenance of the interpretive viewpoints/picnic areas/washrooms • Cabot Trail Commission is being pursued now by community groups • Communities and Provincial Government work together to address road issues. • Implementation body for the "Road Map" oversees redevelopment and maintenance of one of Canada's great scenic drives
Location	NW Cape Breton
Sustainability	Infrastructure is one time only. Proper road upgrades and maintenance a must
Economic Impact	Infrastructure required for increased visitation, repeat visits which will result in increased tourism spending and jobs
Financing	All 3 levels of government
Initial Implementation	Partners to recruit a working group to define the project, timing and a partnership formula that will ensure this happens.

"Ciad Mille Failte" Welcome Centre

(Destination development role - Gateway, hub, touring route)

A critical piece of marketing infrastructure, it will single-handedly drive tourism revenues up in Cape Breton. One of the first of its type in Canada – a centre that markets *and sells* Cape Breton tourism experiences and other products and drives tourism sector revenue for the whole island. Offering all the services visitors want (gas, food, entertainment, tourism products, crafts, art etc) in one location, it will have a near term target of *1 million visitors*. It will be a showcase with the latest in presentation materials and AV technologies that will literally put Cape Breton on the map.

The centre will provide visitors with tourism product and buying opportunities, not just information. Highly trained sales reps will become famous for their service, make recommendations and sell large volumes of Cape Breton tourism product. Atlantic Canadian visitors will return many times to buy services, tourism product and Cape Breton arts and crafts. The Welcome Centre will become an attraction in its own right.

Concept	• Similar in concept to PEI's Gateway Village (integrated services) • Open 12 months a year • Marketing pavilion offers world-class orientation to Cape Breton • Provides services travellers require and entertainment in the form of a mini attraction • Markets/sells Cape Breton tourism product. Extensive introduction to grand touring, outdoor and nature, culture and heritage, and convention products. • Spreads visitors throughout the island • EDM study a good framework • Operationally, a true public/private partnership - designed to cluster services that will ensure dramatic visitation numbers - target of 1 million visitors/year. ***Long-term vision*** - commercial village grows up around centre and the village becomes one of the major stops for visitors to Nova Scotia, an attraction in itself.
Rationale	• This is the major entry point for visitors to Cape Breton • A major requirement for achievement of the revenue growth desired by sector • Supports Celtic, Acadian, Aboriginal, and other marketing initiatives • Potentially large volumes of tourism product sales will happen in pavilion - a shopping centre for all things Cape Breton • Encourage Cape Breton pride, business confidence

	• All serious marketers in the sector, public and private will want to be on the shelf
Components	• Investment in infrastructure that would implement the concept • Gas, fast food, high quality crafts/retail (art gallery level, retail would be Bowrings-type quality) • Cape Breton interpretation/marketing pavilion 4000-5000 sq. ft. • Information area with computers (traditional VIC info), exhibits, interactive displays, multimedia presentations, sales counter with 4 or 5 sales stations. Fully online sale of tourism product. Integrated with e-commerce strategy - becomes "storefront " for entire CB inventory of products - Entertainment area/stage - Small presentation theatre - Internet café - Individual sections of pavilion promote outdoor/nature, Culture and Heritage Grand Touring and Convention/Event experiences - Specific orientation to Mi'kmaq, Acadian and Celtic "experiences" - Expanded washroom facilities - Outdoor interpretation - Expanded parking, particularly for buses - Possible train stop
Developer/ Proponent	• Municipality • Provincial government departments • Land owners • Developer
Potential Partners	• Nova Scotia Tourism and Culture, Cape Breton marketing partnership for the visitor marketing/marketing component • Feasibility study would define commercial partnership model and likely developer, who will develop the commercial services/village • CBGF • Communities of Port Hastings and Port Hawkesbury support (part of their strategic plan) • Other communities see the value in having this marketing channel • Dept of highways will consider routing roads per EDM study • Tourism and Culture prepared to facilitate conversation with highways and to consider operation of centre as a pilot • Parks Canada, communities, Nova Scotia Museums, and industry are prepared to be marketing partners who will provide content for the pavilion.
Location/Sites	Port Hastings Area
Sustainability	Province of Nova Scotia and municipalities, industry marketing partnership maintain selling services. Other services are commercial. Very strategic location will ensure traffic volumes and likely profitability for broader "village"
Economic Impact	New employment, dramatically higher sales of packaged tourism experiences which

	sell all of Cape Breton, shoulder and winter product sales
Financing	Governments Municipalities Private developers
Initial implementation	Partners undertake detailed feasibility study to define optimum commercial/public services mix, revenue targets for the tourism industry from the sale of Cape Breton tourism product, phasing, steps and timing to be taken by partners, specific infrastructure investment required for the pavilion and development cash flow requirements to project .

"Conventions Cape Breton" Congress Centre

(Destination development role - Gateway, hub)

We require better facilities if we intend to become a serious player in the meetings market over the years to come. By stepping up to the 600-person group with modern meeting facilities we will address the majority of the meetings market in Canada. While renewed energy around marketing Cape Breton in the future will help to get the attention of meeting and event planners, the added product being developed will make the sell that much easier. The convention and events market is almost entirely shoulder and winter activity. Cape Breton's strong track record in the events sector, especially sporting events, means that a co-ordinated effort with upgraded facilities will make significant impact in extending the season. All of the priority opportunities outlined in the Road Map will help draw meetings and events and meetings and events will help all of the other opportunities with customers in shoulder periods.

Concept	• Convention facilities - expansion of facilities in Sydney • Capacity up to 600 in a divisible (4 rooms) multi function ballroom
Rationale	• The convention, meetings market is one of the 4 key markets for the future of tourism in Cape Breton, yet the size and quality of meeting facilities near key transportation centres is weak, from a national or even provincial perspective • Expanded facilities will bring new and bigger conventions and events to Cape Breton. Pre and post activity will move large volumes of visitors around the island (Halifax data shows that people spend as much time and money in rural Nova Scotia as they do at the conference itself). This is business which can be captured by Cape Breton as a whole, with deft planning. • A major modern conference facility will drive more meetings business into rural Cape Breton. Pre and post planning meetings often occur outside the major facility .

Components	• Overall complex encompassing total of 16000 sq. ft. • 6000 sq. ft ballroom • Car arrival, entry and access to ballroom through foyer • "Meet and eat" for 300 • Banquets for 600
Developer/ Proponents **Potential Partners**	Private Sector Developer Private sector developer, tourism industry, governments
Location/Sites	Sydney
Sustainability	The Convention Centre would require business plan and sustainability verified by due diligence.
Economic Impact	Significant addition to tourism infrastructure is required to position the convention market, extend the season and operate events all year
Financing	Government and developer
Initial Implementation	Partners to validate business case, negotiate funding, confirm project components and establish time lines.

"e-CB" Tourism e-Commerce Development

(Destination development role - Gateway, hub)

Cape Breton can be the most "bookable" on line destination in the world. The current opportunity to work with the IT sector strategy, and the existence of key partners who have an interest in the project, make it a timely opportunity. Many of our target customers are using the web now (Americans are 3 times as likely to book vacations on the web as Canadians) If done right we have the opportunity to "step over" our competitors who are less fleet of foot. It will require extensive and imaginative partnership but the time is right. This project is very consistent with the Nova Scotia e marketing strategy – in fact it contemplates going further and faster than our Nova Scotia partners.

Concept	To make Cape Breton the most "bookable" online tourism destination in the world and enhance the competitive stature of the industry through the use of information technology. Web sites integrated into various web portals that facilitate access to information on tourism to Cape Breton. Web portal will be the call to action within all advertising and promotional materials.

	e-commerce technologies, which facilitate online sales of products and services, will be instrumental to the IT strategy. These technologies also facilitate communication and business development among industry members. A major priority for long-term business development, the delivery of IT services should be fast tracked with immediate further study and an implementation plan. Good e commerce tools and promotion of the site are essential However, improved broad band access will require investment and development time, other components such as Internet training, assembly of web portals and e-commerce for accommodations sector, can be implemented quickly at very little cost. Site is based on interests of potential visitor - various "views" drill down on information on the site
Rationale	The Internet is the only viable alternative to more expensive advertising and promotion, and the medium best suited to proactive marketing by individual operators and communities Use of the Internet is growing exponentially, especially among the target audience of frequent travellers in our target markets of US, Europe and Canada. Internet marketing is ideally suited to destination marketing targeted at multiple niche markets. Tourism operators in the outdoor adventure area for example can reach customers through links to a wide variety of sites, which cater to their interests. Cape Breton industry has an opportunity to increase yield and achieve sell-outs during a limited peak period. Instant sales technologies will help achieve these results. Internet marketing provides cost effective medium for conveying destination image and positioning for Cape Breton. Particularly appropriate to differentiate us via rich photography, our musical and cultural heritage, and the many online entry points and links that our diverse products offer. Island-wide Internet access encourages industry communication, fostering collaborative / cluster marketing, and making it easier to do business Opportunities to improve quality of product and management with information and training delivered across the Internet. The customer base is increasingly demanding Internet access on site during

	their vacation.,
Components	a) Web portals at the Cape Breton, community, and special interest levels integrated and linked to tourism businesses across the Island. b) Individual business web sites, which: - Are linked through search engines and through collaboration strategies with other web sites - Deliver appropriately rich content to attract and secure business - Are based on templates easily updated by operators with minimal technological savvy. c) Integration of Check In Nova Scotia information / reservation system, including the "Book Now" function for online booking of accommodations. d) Software, which enables the improvement of business competitiveness and profitability, perhaps delivered on an ASP basis for cost / complexity control, such as: - customer relationship management software (CRM) - property management system software (PMS) - business services software such as fax, email, database - delivery of information and training material for all aspects of the tourism industry - support of marketing clusters with information, communications / chat groups - support of online purchasing /ordering by tourism operators e) Increased Internet service including expanded broadband access. This is particularly important for high traffic, content rich, and transaction rich web sites.
Developer/ Proponent	To be determined after a detailed analysis of project scope and needs.
Potential Partners	There are several technology partners from the private sector, the community and from the tourism industry who could be participants in the implementation of island-wide e-Commerce. These include: a) MTT, who have infrastructure installed across the Island for dial up Internet. b) Eastlink who have cabling in the parts of the Island, notably Sydney, and would like to expand their service area and product delivery beyond television and into Internet and telephone. c) Sprint Canada who are keen to expand service capabilities, and view a strategic partnership with the tourism industry, federal government, Eastlink, the Province and other players as their opportunity to do so. d) There are several players who have created web portals, web hosting services, web design firms in Cape Breton and have the talent to be part of the expansion of Internet services. e) Atlantic Learning Innovations Network, (ALIN) who have been involved in studies to demonstrate the need for high speed Internet access as well as being active in promoting the use of the internet. ALIN has a sizeable amount of hardware and storage capacity, which could well be utilized to run the Cape Breton web portal. f) University College of Cape Breton, who have been involved in studies on need for broadband access, and have expertise relating to the Internet and e-

	commerce. g) CAP Sites in communities throughout the Island, which can be important players in the e-commerce strategy. h) Individual businesses, which have web sites developed and hosted. i) Nova Scotia Department of Tourism & Culture, which maintains the principal tourism information web portal for Nova Scotia, and would be a likely partner in online marketing initiatives. j) The Tourism Industry Association of Nova Scotia, which is the provincial partner for numerous Internet and business automation projects driven by Tourism Atlantic and other partners. For example, previous projects have funded Internet consultants to work with industry to implement new technologies.
Location/Sites	The Internet must be accessible across the Island, with broadband access being essential in key areas to deliver the rich content and frequent use demanded by our customer base. Welcome centres in Canso and Sydney provide access to the site and real time booking for customers While high-speed access in Port Hawkesbury and Sydney may suffice in the short term, this capability must be expanded throughout Cape Breton in very short order, if we are to reach our objective of being a bookable online destination. As much product as possible accessible as soon as possible Entertainment/music will play such a prominent role in attracting tourists. Sites which play samples of Cape Breton music or broadcast special events, require more band width.
Sustainability	Portal would offer web site templates to meet individual operator needs, and be able to be updated easily by operators. Web portal participation is subscriber based with fees covering operations costs. Advertising revenue from site would support marketing. Transaction revenue from E-commerce activity. Portal would provide services for a fee on an ASP basis. Portal could also function as an ISP for tourism industry.
Economic Impact	By taking the steps to enhance e-commerce across a web portal, each of the individual investments already made by operators will produce more results. It will be possible to dramatically increase traffic on the individual sites and get a higher percentage of buyers versus shoppers. More bookings re access new customers. Increased yield by reaching higher end customers, with richer product

	Increased occupancy due to dynamic selling real time. Enhances partnership marketing through better communications among industry. Improves operational efficiency with opportunities for group purchasing, shared resources and information.
Financing	Private sector technology partners Tourism Industry Governments
Initial Implementation	Key stakeholders to develop key partnerships, establish timelines and identify projects, secure commitments and launch the site

Fleur de Lis Trail "Route Ancienne"

(Destination Development Role – Hub, Touring Route)

The Fleur de Lis Trail will become the road route that helps build the Acadian Experience in Cape Breton. It will provide momentum for the creation of more Acadian product and the addition of key infrastructure, like the eco-adventure lodge concept. Expansion and transformation of the Two Rivers Wildlife Park into the Atlantic Canada Nature Centre and Wildlife Sanctuary will provide more reasons for the visitors to use this route. Now is the time for all parties to commit to the completion of this historic driving trail to Louisbourg. Parks Canada and all sector partners support the initiative and, even more importantly, so does the market.

Completion of the Trail is an integral part of the infrastructure "system" needed to step-up to new market opportunities and the long term revenue goal. The incremental goal of $170M *a year* is the business case – it is a good business decision for Cape Breton and for its communities. The market and trends data clearly shows that our major markets over the next few decades will stay longer, and spend more with this key piece of infrastructure completing the eastern loop around the Island. New community-based tourism products will flourish as a result. In the short term, the task at hand is to provide public washrooms and interpretative features at the entrance(s) to the Trail while government partners discuss timing for completing the road loop to Fortress Louisbourg.

Concept	• Rejuvenation of the Trail as the platform for grand touring on the eastern side

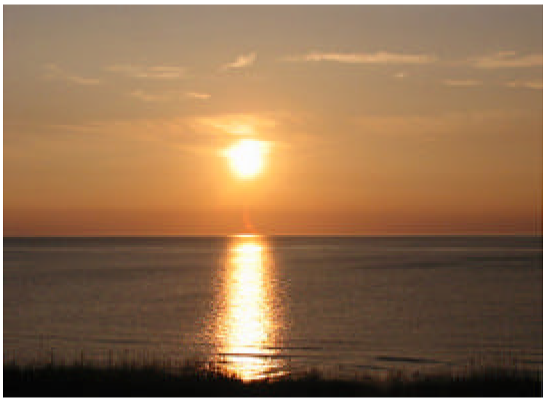
	of the Island • Establishment of a major sense of entry near both the southern and northern entrances to the Trail with appropriate signage and interpretative pavilions • Commitment by all levels of government to undertake an infrastructure upgrading program (repaving, wider lanes, paved shoulders, orientation pavilions with washrooms) that positions the touring and Acadian experiences for the eastern side of the Island over the next few decades.
Rationale	• A clear product/market match as grand touring will remain our strongest market • Provides momentum for Acadian and other product development on eastern shore • Creates a dramatic, visual and logical alternative to the 105 corridor for touring visitors, particularly those headed for Louisbourg • Leverages the power of Louisbourg – now it is accessible for all and not perceived to be out "out the way" • Louisbourg numbers will increase, as will tourism receipts in Richmond and Cape Breton Counties • Makes extending the season at Fortress Louisbourg more viable. • Supports the Two Rivers Wildlife Park opportunity – visitors motivated by wildlife viewing will be more likely to start their vacation by turning right at the Causeway • More sophisticated visitors require more and better infrastructure • Responsibility of all three levels of government
Components	• Selected paving and widening • Major orientation/interpretative locations with public washrooms and picnic area near the south and north trail entrances where there is currently no welcome or sense of arrival and no interpretation/public facilities • These orientation pavilions can work in harmony with the orientation centre required for the "Connexion Acadien" cultural experience opportunity" – same physical location and structure. Southern location in lower Richmond County, Northern location likely on Route 22, providing an orientation to the trail in a high traffic area • Better Trail signage throughout • Highway frontage development guidelines to maintain attractive appearance in developed areas and natural setting in undeveloped areas • Several additional scenic viewpoints with interpretative plaques, picnic areas and public washrooms.
Potential Partners	• Government provides some funding for Fleur De Lis Trail orientation centres • Provincial and federal governments provide funding for infrastructure upgrades on Trail • Parks Canada provides liaison re park linkages • Communities partner in the development and maintenance of the interpretative viewpoints/picnic areas/washrooms

Location	Eastern Cape Breton
Sustainability	Infrastructure is one time only. Proper road upgrades and maintenance are a must Public private partnership or toll road are possible funding options
Economic Impact	Infrastructure required for increased visitation, repeat visits Opens up Richmond County and will attract more people into less travelled areas of the county.
Financing	All three levels of government including community partnerships
Initial Implementation	Three levels of government working group to define the project, timing and a partnership formula that will ensure this happens.

"Inverness Links" Resort and Golf Club

(Destination development role - Hub, Touring route)

The Inverness project can define a future for Inverness County and Cape Breton, that could rank it with the Monterey Peninsula in California. The area is no less beautiful and the course as planned will become famous all over North America. The stunning scenery, natural setting and access to nature trails locally round it out as a project which will position the west coast for the next 50 years, in the same way Keltic Lodge did for the Cabot Trail in the 50s.



The project will become a magnet for nature product development, high end residential development and will "pull" the grand touring and nature visitor up the Ceilidh Trail. Ultimately the resort will strive towards a year-round positioning offering winter getaways and spa packages, cross-country skiing, snowshoeing, snowmobiling and winter nature interpretation. While golf will be the premium product in spring, summer and fall, it will be complemented by a wide range of resort, spa, outdoor adventure and ecotourism activities/excursions. The potential for "storm-watching" packages in the winter should be considered, similar in concept to those successfully offered by BC's Wickaninnish Inn on the west coast of Vancouver Island.

Concept	World class links style golf course complemented by high end resort village with an array of services from four star accommodation, to fine dining, shops, hotels, marina and bed and breakfasts. Ideally all accommodations, restaurant and other public areas would have ocean views. Resort amenities would include heated swimming pool and swimming beaches, small marina, health club/spa facilities, tennis courts, lawn sports, adjacent hiking trails, nearby mountain biking trails, etc.
Rationale	Strengthens Cape Breton as a destination area in target markets Elevates stature and strength of the Island's golf product Opens and plays to new markets Represents a catalyst for new investment Provides better product balance and opens previously underdeveloped areas Redirects traffic appropriate to increased length of stay
Components	Capital projects include - 18-hole links style golf course – world class Nicklaus design with beautiful ocean vista Resort village with phase one development comprising 40-60 unit four star or better accommodation
Developer/ Proponent	Not-for-profit community group along with experienced off-Island investors.
Potential Partners	Private sector Investors
Location/Sites	Inverness Village and Area
Sustainability	Project and events/programs operate on for-profit basis as cited in a business case and verified by due diligence
Economic Impact	New employment, new incremental household income, expanded GDP, elevated tourist receipts because of increased numbers, length of stay and yield
Financing	Government Developer Other
Initial Implementation	Partners to validate business case, negotiate funding, and establish time lines.

"Sydney-by-the-Sea" Waterfront and Heritage District

(Destination development role - Gateway, hub, touring route)

This project will help present a new, vibrant image of Sydney to visitors from around the world. Other cities (Duluth has had great success) have moved from an industrial past to a vibrant new future using the theming of a waterfront district to help build a new economy. Sydney has the assets and can give birth to this idea through integration of efforts already underway.

Concept	A district comprising Sydney downtown as defined by signage, landscaping key new infrastructure, programming and marketing. Offering appealing (all year) experiences. Facilities, attractions, activities, events and happenings. Integrated packages which link events, recreation and entertainment, historical buildings, monuments and sites and natural attractions like Sydney Board Walk. Draws on the area's natural strengths in terms of accommodation, historic buildings, facilities, meeting/convention capacity and strategic docking A new welcome centre for cruise and other visitors will deliver a world class welcome and sell products (smaller version of the Welcome Centre at Canso) Pre-packaged products as well as spontaneous mix and match
Rationale	Links all major components of the district in product groupings which are more readily marketable. Capitalizes on strategic positioning in terms of cruising, transportation links, including the airport, urban setting and harnesses accommodation and food service offerings. Facilitates year round offerings Cruise ship Welcome Centre will be the second gateway to the island Cruise brings tens of thousands of our best target customers to Cape Breton each year and will, for the foreseeable future. They have a high tendency to return and will buy product and future packages in the centre Showcases Cape Breton cultural product offerings World class cultural centre Bundles attractions and makes Sydney a destination Provides for community and industry focus and collective action Potentially increases length of stay, yield and expands market segments Helps to reposition Sydney and redefine the industry, in particular its potential in the minds of key stakeholders Allows for links off Island such as with Halifax Repositions the district within the context of the tourism industry
Components	Capital projects include -

	Cruise Welcome Centre and signage (3,000 to 5,000 sq. ft. multi purpose facility to provide visitor information, offer entertainment, and select retail service). This gateway will perform a similar function to Canso Causeway centre, selling all of Cape Breton Mi'kmaq Cultural Heritage Centre & Museum (50,000 plus sq. ft. centre on Sydney waterfront comprising exhibition area, resource facilities, small meeting and classrooms, retail outlets, interpretation area and large meeting/convention area) Outdoor stage for lively cultural events Signage Strategy as articulated in Sydney Downtown Revitalization Plan, including downtown gateway signage, waterfront boardwalk access signs, interpretation boards and visitor amenities, north end heritage tour orientation sign cluster and site identification signage and main street business signage Improved links to waterfront from downtown Sydney as cited in Sydney Downtown Revitalization Plan Main street façade improvement program Craft and Design Centre on Charlotte Street at former Crowell's Department Store Extend Boardwalk north and south Programming and visual identity include – Ceilidhs and entertainment downtown Self-guided heritage walking tours Entertainment and cultural events at the farmers market Brand downtown Sydney and develop a common visual identity
Developer/ Proponent	Industry Sydney Downtown Development Association CBRM Sydney Port Authority Sydney Chamber of Commerce Membertou – First Nations Old Sydney Society Individual Business Operators Cape Breton County Economic Development Authority Community Museums
Potential Operators/ Partners	Industry Government

Partners	Not-for-profit groups Independent business
Location	Downtown Sydney
Sustainability	All projects and events/programs operate on cost recovery basis, strategic infrastructure represents one time only expenditure,
Capital Cost	Cruise Welcome Centre and signage Mi'kmaq Cultural Heritage Centre & Museum at Membertou Signage Strategy Improved links to waterfront Main street façade improvement program Craft and Design Centre on Charlotte Street at former Crowell's Department Store Extend Boardwalk
Economic Impact	New employment, new incremental household income, expanded GDP, elevated tourist receipts because of increased numbers, length of stay and yield
Financing	Government Industry Individual associations Private developers
Initial Implementation	Partners to recruit a working group to develop key partnerships, establish timelines and identify projects, secure commitments

ATTRACTIONS, FESTIVALS AND EVENTS

While some of the preceding infrastructure initiatives will clearly result in the creation of new attractions directly or indirectly, there are four additional attraction developments that merit inclusion on the priority development opportunities list (in alphabetical order), as described on the following pages.

Festival Cape Breton

(Destination development role - Hub, Touring route)

"Festival Cape Breton" builds on the proud history of the island, our sense of place " we are an island, a rock in the sea" and of our age old links to visitors from across the sea. Eventually a year long festival, it will grow over the coming decades to offer cultural programming at all times of the year. It will draw visitors to every corner of the island and empower our cultural efforts. It will drive significant off season business, support all of our target markets, and in time will grow to become a star attraction as outlined in the Nova Scotia tourism vision - an attraction that draws 600,000 visitors a year.

It will be central to our determination to showcase our unique cultures, and it will become famous the world over. "Festival Cape Breton" will develop a signature production, shown on the main stage in high season and taken to world audiences from time to time. Like Cirque de Soleil, the Bolshoy or the Royal Winnipeg Ballet, it will make our island famous as a cultural treasure.

Concept	• A potential "star attraction" as outlined in the Nova Scotia Tourism Vision - an attraction/festival that draws 600,000 visitors per year • All cultures participate • Builds Music Industry, production, recording, product sales, management • Branson, Nashville, Charlottetown and Stratford Festivals provide useful examples • All year permanent festival that promotes not only the music and culture of Cape Breton, but is a stage for world wide cultural entertainment - music, theatre, opera etc. – broadly encompassing the performing arts • While not restricted to Cape Breton culture, the core programming will have a Cape Breton heart or link • Linked to all cultural heritage groups world wide (example is the Polynesian Cultural Centre in Hawaii) to ensure fresh programming and cross pollination of ideas, market information etc • Local and touring shows from other countries will be needed eventually to create an all year draw and particularly to get multiple visits annually from Nova Scotians and other Atlantic Canadians • Productions of all sorts happen in many locations sometimes simultaneously, all year • Encourages/supports conventions and meetings, casino market, cruise • Incorporates other visual and performing arts and includes elements such as

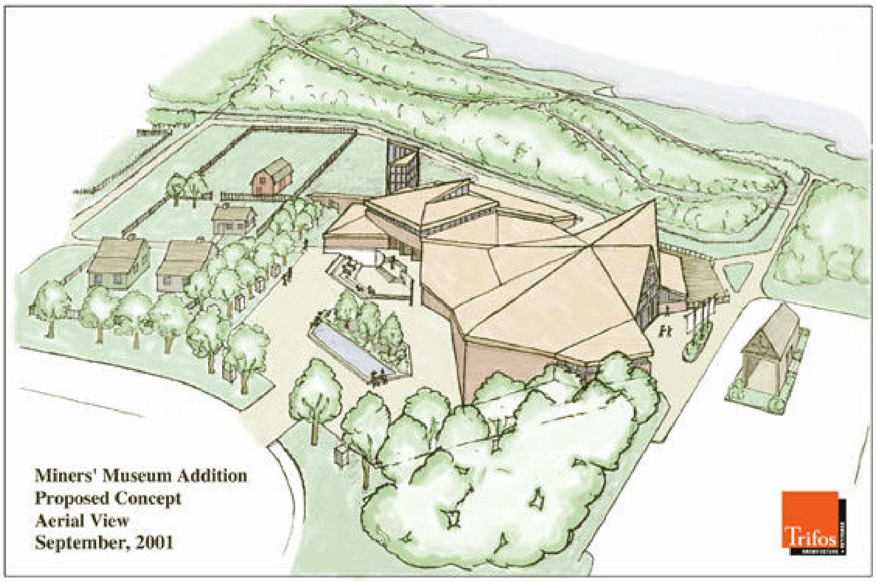
	cuisine in packaging. • Uses Celtic Colours as an inspiration - Winter Festival - La Mi-Careme (Cape Breton Mardi Gras) - a near term objective
Rationale	• Need year-round star attraction for Cape Breton • Cape Breton has the culture and the talent to do it • Legitimate positioning as an international destination of music and culture • Cultural groups already moving to partner • Broad support in communities
Components	• Main stage in Sydney area, within walking distance to convention facilities, the cruise ship pier, restaurants, hotels etc. • Membertou project a major potential link - locating main stage at Membertou Cultural Heritage Centre could serve triple duty, helping this project and also the Mi'kimaq Experience/Trail and Sydney by the Sea. • Web-based programming, markets all year, and sells music products online. • Mainstage production would be a signature production introducing Cape Breton culture to the world - good model is the current Brooks Diamond show. In due course it would tour the world like the royal Winnipeg ballet, Vienna Boys Choir, and other successful cultural productions • Charter air service and travel industry marketing partners are key • Programming themes will encourage CB talent to create performing arts product • Many locations around the Island would operate under the "Voices " banner, if approved for content and quality • A "pool" Of staging and audio equipment will make it possible for some smaller Communites to participate • Programming a combination of private sector community groups and volunteers • Education and training components • Strong patron and sponsorship programs
Developer/ Proponents	• Performing Arts Partnership of interested groups (Celtic Colours an example) operate as a co-op. True cross cultural links are critical
Potential Partners	• Cultural community steps up to programming under product development programs set up by partner agencies • Tourism and Arts and Culture stakeholders • HRDC - training • Gaelic College and other institutions help with training • Product development and operational funding for music sector include - Nova Scotia Tourism and Culture, HRDC, Nova Scotia Economic Development, Nova Scotia Business Inc and Nova Scotia Film Development Corporation. • Fund-raising/sponsors • Music Industry Association of Nova Scotia (music sector strategy is just out) • Tour operators in core markets

	• Air and other travel partners.
Location/Sites	• Main stage in Cape Breton Regional Municipality. Satellite locations possible in many communities around the Island (stages, fields, halls etc as available) including Judique, Isle Madame, Welcome Centre at Causeway, Baddeck, Cheticamp, Inverness, Glace Bay, Louisbourg, Iona, St Anns, Port Hawkesbury and Mi'mkaq communities
Sustainability	A co-ordinator role is essential to ensure that the festival builds to star attraction status - Good target for sponsorship funding from private industry, local or national
Economic Impact	Season extension and winter tourism impact. Supports the shoulder and winter events market, stimulates cultural and business development, music industry, stems outflow of performing artists, stimulates development of music industry in Cape Breton, becomes the main all year Cape Breton attraction over the coming decades Social impact - builds pride and confidence Builds all aspects of Music Industry, recording, talent, management, marketing.
Financing	Producers, sponsors, product/cultural groups, government for mainstage
Initial Implementation	Partners to recruit working group to create a performing arts partnership with a specific focus on this project. Assist them to create a permanent organisational model, define long term goals, seek a patron and a funding formula required for the co-ordinator role in the short term, (sponsorship in the long term)

"Men of the Deeps" Miners' Museum and Colliery Heritage District

(Destination development role – hub, touring route)

The Miners Museum has been a major attraction for Cape Breton and is a strong part of the industrial heritage product. With its new business plan and the integration of an innovative heritage district component, it elevates to the level of major potential hub, a hub that has the potential to support major tourism routes that encompass all parts of Cape Breton Regional Municipality (CBRM). Its enhanced role will provide traffic flow for other smaller yet worthy projects in the area and support Colliery and Marconi Trail activity. Its link to Louisbourg will be key and help to close an exciting touring loop. The completion of the Fleur de Lis Trail will bring dramatic new volumes of traffic to the area.



Concept	A jurisdiction or district comprising Glace Bay and area and offering appealing varied experiences replete with facilities, attractions, activities, events and happenings. Integrated packages which link events, entertainment, historical building such as restored Glace Bay Town Hall and Savoy Theatre, Colliery Trail, monuments and sites, including Marconi Historic Site an expanded and enhanced Miners' Museum. Draws on the area's natural strengths in terms of historic buildings, museums and heritage attractions. Pre-packaged products as well as spontaneous mix and match
Rationale	• Links all major components of the district in product groupings which are more readily marketable. Capitalizes on strategic positioning in terms of heritage sites, and industrial past • Facilitates year round offerings • Provides for community and industry focus and collective action • Gives context for Colliery, Marconi and other trail development activity • Potentially increases length of stay, yield and expands market segments • Helps to reposition Glace Bay and area and redefine the industry, in particular its potential in the minds of key stakeholders • Allows for improved links on Island with Parks Canada • Repositions the district within the context of the industry
Components	Capital projects include: • Exterior and interior capital upgrade of main museum building including mechanical and electrical. • Enriched and new exhibits in additional to new interactive displays and multimedia presentations

	• New site additions including pavilion building, restaurant, amphitheatre, landscaping and exhibits • Signage Strategy is articulated in Glace Bay Downtown Revitalization Plan, including gateway signage, waterfront area, interpretation boards and visitor amenities, heritage tour orientation sign cluster and site identification signage and main street business signage • Improved links to waterfront from downtown Glace Bay • Main street façade improvement and streetscape program Programming and visual identity include: • Ceilidhs and entertainment downtown • Self-guided heritage walking tours • Entertainment and cultural events at Miners' Village and Savoy Theatres
Developer/ Proponent	• Industry • Glace Bay Downtown Development Association • CBRM • Chamber of Commerce • Community Museum Groups • Individual Business Operators • Cape Breton County Economic Development Authority
Potential Partners	• Industry • Government • Not-for-profit groups • Independent business
Location/Sites	Glace Bay area
Sustainability	All projects and events/programs operate on cost recovery basis, strategic infrastructure represents one time only expenditure,
Capital Cost Components	• Streetscape and Façade program • Improvements Miners' Museum Phase I • Signage Strategy • Main street façade improvement program
Economic Impact **Financing**	New employment, new incremental household income, expanded GDP, elevated tourist receipts because of increased numbers, length of stay and yield • Government • Industry and private developers • Individual associations
Initial Implementation	Proponent to develop appropriate partnerships, establish timelines, identify projects, and secure funding commitments.

"Seasons at the Fortress" – Extending the Season at Fortress Louisbourg

(Destination development role - hub, touring route)

Extending the season at the Fortress is seen as a major opportunity for capturing and keeping our target customers in the fall season particularly. When integrated into a plan that includes the community of Louisbourg and the adjacent communities it builds into a powerful story for season extension. Visitors who come to Cape Breton to experience activities at the Fortress will also experience Cape Breton broadly. This fits well with series of other activities and developments that will collectively build the shoulder season over the decades ahead.

Concept	• This programming opportunity sees leveraging the new momentum in the community of Louisbourg to work with the Fortress to dramatically extend the tourism season in the area. • Initially involving an extended fall program of events, in due course it could build programming in the spring as well • A festival like series of events and experiences that engage the visitor in historic cultural experiences including cuisine, theme productions, training in historic skills and learning vacation programming • Major historical stories reenacted at different times during the year • School groups and university groups from all faculties are invited to attend workshops, symposia and events at different times during the year
Rationale	• Addresses a major concern from our trade partners and consumers alike " Fortress closes too early" • Strengthens Cape Breton's heritage product • Elevates stature of the popular Parks Canada product offering • Increases length of stay in Louisbourg and area • Represents a catalyst for new programming in the entire community • Appeals to several potentially significant niche markets
Components	• New exhibits • New Programming • Becomes a part of the "Voices of Cape Breton" cultural activity all year • Part of major sporting and other shoulder season events as they develop • Learning vacation festival(s) • Cuisine Festival • Exchange programs with universities and clubs • Series of events that integrate themes in the whole community • Major hallmark events like the 250th anniversary in 1995 occur every few years, with a different theme • Links with tour operator partners who market learning vacations and specialty

	tours, like the Smithsonian
Developer/Proponent	• Parks Canada
Potential Operators/Partners	• Parks Canada • Town of Louisbourg • CBRM • Tourism operators • Partners communities like Glace Bay and Sydney
Location/Sites	Louisbourg area
Sustainability	Project operated by Parks Canada within the framework of the department's annual appropriation and with operations and marketing partners Revenues help defray costs or even provide profit
Economic Impact	Increased length of stay, improved yield on AGB product, expanded GDP, penetration of new niche markets, expanded employment
Financing	Government
Initial Implementation	Partners to review potential and timing and create a working group that would outline the business case, infrastructure, exhibit and programming needs, timing and funding options.

"Wings" Hall of Flight Attraction Development

(Destination development role - hub, touring route)

An exciting addition to the world famous Bell Museum, the Hall of flight would pull new visitors to the island, stimulate a new flight festival and do double duty by providing a Baddeck based stage for Parks Canada programming, "Voices of Cape Breton" productions and other community based day time and evening events

Concept	Compelling exhibit featuring AG Bell's work on flight, incorporated into and complementary of the current complex in Baddeck and suitable as a basis for new programming Evening programming and stage component keep visitors longer and extend the season for Baddeck
Rationale	Strengthens Cape Breton's heritage product Elevates stature of the popular Parks Canada product offering Increases length of stay at AGB and overall visitor impact in area Represents a catalyst for new programming and a major festival (of Flight) Appeals to several potentially significant niche markets
Components	Capital projects include -

	Hall of Flight – 7,000 to 10,000 sq. ft. structure Stage and modest theatre used for Parks Canada programs, "Voices of Cape Breton" productions and local activities Exhibits including Silver Dart replica Programming includes – Aviation Festival Kite Festival and Events Evening programs
Developer/ Proponent	Parks Canada
Potential Operators/ Partners	Parks Canada
Location/Sites	Baddeck – AGB Complex
Sustainability	Project operated by Parks Canada within the framework of the department's annual appropriation Stage used for "Voices of Cape Breton" and other programs that pay rent
Economic Impact	Increased length of stay in area, improved yield on AGB product, expanded GDP, penetration of new niche markets, expanded employment
Financing	Government
Initial Implementation	Partners to recruit a working group to help facilitate realization of the project including the recruitment of appropriate partner groups.

CULTURAL HERITAGE

Capitalizing upon Cape Breton's strong cultural heritage themes – particularly the Acadian, Aboriginal and Gaelic/Celtic cultures – is a key focus of the Road Map and a distinctive cultural experience product is recommended in each case as a priority opportunity (listed alphabetically).

"Connexion Acadien" Cultural Experience

(Destination development role - hub, touring route)

The Acadian Experience will begin at the Welcome Centre in Port Hastings, where visitors who have an interest in Acadian culture or indeed grand touring visitors who want to start their tour in this way, will begin their tour on the eastern shore. Packaged product and information on a variety of Acadian Experience opportunities will be promoted.

Heritage, cultural, and cuisine packages will available and genealogical source information will be on hand. Learning vacations will be the focus of the shoulder season programming. Visitors will be briefed on Acadian activities and encouraged to visit as many of the Acadian sites as possible on the Island. A strong partnership has to evolve with all Acadian communities to overcome the competitiveness among these areas. Each community certainly has unique strengths and there should be a will to grow those to make a stronger Cape Breton Acadian Community with greater visibility.

Concept	Acadian Experience trail featuring Acadian communities. The experience will include cultural happenings, heritage sites, interpretative events, nature and natural attractions and water based pursuits. Orientation to the Acadian Experience will occur at the Welcome Centres Acadian communities come together as one in this effort to integrate and jointly promote all Acadian experience under one "brand" so that the visitor gets a sense of rich product experiences instead of disjointed or unconnected product Working together communities "pass the visitor along" from one community to the next, increasing their length of stay and their satisfaction level
Rationale	Enriches overall Cape Breton product, plays to growing interest in cultures, provides new and distinct experience with the potential to increase length of stay and yield and attract new market segments. Moves visitors around the island Strong potential for shoulder and winter season experiences Capitalizes on the opportunity presented by Champlain 400 and Congres Mondiale Acadien
Components	Capital projects: • Signage illustrates the travel route (harmonised with the Fleur de Lis trail signage and other signage around the island) Plus: • Active involvement in CTC Acadian Product Club • Experiential programming – community, home and harbour visits nature interpretation, meals and celebrations, stage productions that engage the visitor • Integrated marketing of the Acadian Experience as one or more packages • A "programming" integration of events and experiences that links all locations • Learning vacation product
Developer/ Proponent	Partnership of Acadian Communities and groups
Potential Partners	Partnership of Acadian Communities and groups Tourism and Arts and Culture Stakeholders CTC Product Club

Location/Sites	Isle Madame/Arichat/Petit de Grat, Louisbourg, Cheticamp, St. Joseph du Moine
Sustainability	Packaged product and programming developed and operated by communities and their partners
Economic Impact	Increased visitor traffic and length of stay on eastern shore, expanded GDP, penetration of new niche markets, expanded employment
Financing	• Government • Acadian partnership
Initial Implementation	Partners to recruit a working group to define the overall project and get community groups working together.

Mi'kmaq "Time Travel" Aboriginal Cultural Experience

Project Profile (Destination development role – hub, touring route)

Much work has been done in recent years as the Mi'kmaq community brings new tourism product to market. A number of exciting and strategic infrastructure projects will help create an overall inventory of Mi'kmaq product and spread visitors around Cape Breton.

Experiencing the Mi'kmaq culture will be done through a rich and integrated series of packages, experiences, heritage sites and touring opportunities. Collectively they will form the Mi'kmaq Experience in Cape Breton sharing 10,000 years of proud human history.

Concept	Aboriginal experience trail featuring Bras d'Or Lakes first nations communities (Chapel Island, Wagmatcook, Eskasoni, and Waycobah) and linked to Membertou in Sydney. The experience will include cultural happenings, heritage sites, interpretative events, nature and natural attractions and water based pursuits. Orientation to the Mi'kmaq Experience will occur at the Welcome Centres Wagmatcook may play a role re orientation for traffic on the 105 although visitors in all communities should be introduced to the packages and programming offered on the trail Working together communities "pass the visitor along" from one community to the next, increasing their length of stay and their satisfaction level
Rationale	Enriches overall Cape Breton product, plays to growing interest in cultures, provides new and distinct experience with the potential to increase length of stay and yield and attract new market segments. Adds to overall infrastructure. Highlights Cape Breton distinctiveness in terms of the size and uniqueness of it aboriginal communities Strong potential for shoulder and winter products Moves visitors around the island
Components	Capital projects could include: • Long house project at Eskasoni • Mi'kmaq Cultural Heritage Centre & Museum on Sydney Harbourfront

	(dramatic architecture) • Orientation centre at Wagmatcook (mostly interpretation and programming) • Signage illustrates the travel route • Plus: • Experiential programming - canoe trips, nature interpretation, meals and celebrations, stage productions that engage the visitor • Integrated marketing of the Mi'kmaq experience as one or more packages • A "programming" integration of events and experiences that links all locations • Learning vacation product
Developer/ Proponent	Band Councils
Potential Partners	Band Councils Governments (all levels)
Location/Sites	Eskasoni, Membertou, Chapel Island, Wagmatcook, and Waycobah
Sustainability	Capital projects operated on cost recovery basis by proponent based on business case documentation Experience packaged product and programming developed and operated by bands and their partners
Economic Impact	Increased visitor length of stay, expanded GDP, penetration of new niche markets, expanded employment
Financing	• Government • Band Councils • Other
Initial Implementation	Partners to discuss business case, design and engineering, negotiate funding, and establish time lines.

"The Celtic Celebration" Cultural Experience

(Destination development role - hub, touring route)

Like the other cultural experience trails the Celtic/Gaelic Experience will encourage visitors to roam around the island and connect with a variety of Celtic/Gaelic elements – cultural, heritage sites and genealogy, in the order they chose. A genealogy exhibit at Iona will give a comprehensive introduction to Celtic/Gaelic culture and encourage visitors and people at a distance to trace their Celtic/Gaelic roots. Because the Celtic Experience will be promoted at the welcome centre in Canso, many visitors will chose to turn left at the causeway and start their tour of Cape Breton on the west coast.

With Judique as a strong draw, Inverness offering world class golf and natural experiences and the Cabot Trail beyond, many visitors interested in Celtic culture will start in the west, then complete the Celtic loop. The intent of the Celtic Experience trail will be to encourage collaboration among Celtic communities and groups, so that they create product/packages that will draw visitors to many parts of the island and to co-ordinate marketing under the Celtic " brand ". At Iona visitors will be briefed on Celtic activates and encouraged to visit as many Celtic sites as possible on the island.

Concept	Celtic Experience package, program and route featuring Celtic communities. The experience will include cultural happenings, including music, crafts & cuisine, heritage sites, interpretative events, nature and natural attractions and water based pursuits. Orientation to the Celtic Experience will occur at the Welcome Centres Celtic communities come together as one is this effort to integrate and jointly promote all Celtic Experience under one "brand" so that the visitor gets a sense of rich product experiences instead of disjointed and unconnected product Working together communities "pass the visitor along" from one community to the next, increasing their length of stay and their satisfaction level
Rationale	Enriches overall Cape Breton product, plays to growing interest in cultures, provides new and distinct experience with the potential to increase length of stay and yield and attract new market segments. Moves visitors around the island Strong potential for shoulder and winter season experiences
Components	Capital projects: • Signage illustrates the travel route (harmonised with other signage around the island) • Plus: • Genealogy exhibit at Iona • Experiential programming - community, home and harbour visits, nature interpretation, meals and celebrations, stage productions that engage the visitor • Integrated marketing of the Celtic Experience as one or more packages • A "programming" integration of events and experiences that link all locations • Learning vacation product
Developer/ Proponent	Partnership of Celtic Communities and groups
Potential Partners	Partnership of Celtic Communities and groups Governments (all levels)
Location/Sites	Iona, Judique, Mabou, Inverness, Margaree Valley, North River, North Shore, St Ann's, Englishtown, Glenville, Pleasant Bay, Lake Ainslie, Christmas Island and

	other communities
Sustainability	Packaged product and programming developed and operated by communities and their partners
Economic Impact	Increased visitor traffic and length of stay on eastern shore, expanded GDP, penetration of new niche markets, expanded employment
Financing	• Government • Celtic partnership
Initial Implementation	Partners to define the overall project and get community groups working together.

OUTDOOR ADVENTURE AND ECOTOURISM

The study recommends many opportunities in this category including the following four value-added priority catalyst outdoor adventure/ecotourism development opportunities (listed alphabetically) each of which has significant spin-off in terms of potential employment and related support services such as guided tours and excursions, as well as the ability to extend the season.

Atlantic Canada Nature Centre and Wildlife Sanctuary

(Destination Development Role – Hub, Touring Route)

Located at the existing Two Rivers Wildlife Park this centre would introduce the visitor with a passion for nature to the whole array of wildlife in Cape Breton. It would be a launch pad for an extensive connection to the natural environment and wildlife of the island. Encouraging shoulder and even winter season travel, the centre would prepare visitors for expeditions to Cape Breton eco-lodges, wilderness trekking, or act as a first rate natural sciences experience for the grand touring visitor. It would build a long term clientele in the Atlantic Canada family market, be another venue for "We Rise Again" Festival Cape Breton productions and convention receptions, as well as providing a major reason for travelling along Route 4 and the Fleur de Lis Trail.

Concept	The centre would introduce the visitor to the entire natural environment and wildlife experience in Cape Breton. The centre would facilitate promotion of the many wilderness areas of the Island, as well as the promotion of specific operators and packaged nature products. The site would be developed further to expand the indigenous wildlife exhibits and

	ecotourism trails and interpretive features, as well as related programming such as night sky viewing (star gazing). The cultural linkages of the historic French settlement of the area and relationships to Fortress Louisbourg would also be interpreted on-site. A world class visitor orientation and interpretive centre with proper public restroom facilities, food services and gifts/crafts shop would be developed on the hillside with panoramic views over the Mira River. The complex would be closely aligned with Nova Scotia Museums and be the Province's pre-eminent natural history display.
Rationale	Enriches overall Cape Breton product, plays to growing interest in nature, potential to increase length of stay, yield and attract new market segments. Strategic location near two of the Island's largest concentrations of tourists (Sydney and Louisbourg). Moves visitors around the island. Strong potential for shoulder and winter season experiences.
Components	Major projects: • Orientation Centre at Two Rivers Wildlife Park. A big draw for Route 4, it would promote the entire nature and ecotourism product experience on the island. • Expedition room would brief visitors on wildlife, uses exhibits from NS Museums • Visiting specialists • AV area for dramatic films of Cape Breton wildlife • Connected to the Wildlife Park for viewing of select animals • Interpretive nature trails and guided walks, building on those which have already been developed, including heritage interpretive features tying in with the history of French settlement in the area. • Sale of packaged nature tourism products on-site.
Developer/ Proponent	Two Rivers Wildlife Park
Potential Partners	Two Rivers Wildlife Park Governments Tourism Industry
Location/Sites	Two Rivers Wildlife Park
Sustainability	Nature product partnership would operate the centre
Economic Impact	Increased visitor traffic and length of stay on eastern shore, expanded GDP, penetration of new niche markets, expanded year-round and seasonal employment
Financing	• Government • Nature partnership
Initial Implementation	Proponent group to define the overall project and get groups interested in promoting nature products to work together. A comprehensive concept/feasibility study would need to be undertaken to more precisely define the concept and its components, determine viability and help to secure funding for implementation.

"Passage East" Cape Breton Eco-Cruise

(Destination development role - touring route)

New cruise itineraries will help put Cape Breton on a world map. No less appealing than the Galapagos Islands, the Cape Breton Bras d'or Lakes and ocean cruise itineraries will appeal to the international and the local market alike, with accessible high end experiences that can be enjoyed in safety. Partners have an interest, communities and groups are keen to get moving, and the market is there. Additional cruise itineraries will build on the recent significant success of Cape Breton in the international cruise market, giving cruisers a reason to return, and support many of our target markets with shoulder season product. Above all, the Cape Breton cruise itineraries will position Cape Breton as an international destination with partners like National Geographic and the Smithsonian Institute offering unique small cruise ship or charter yacht learning vacations.

Concept	• High end cruise itineraries offered by small cruise line(s) and/or charter yachts. Positioned as a "Lindblad Explorer" type experience • Ships from 12 passengers to 100 would be the primary target • Expedition/briefing room on board • Vessel does not require special wharfing • Major focus on the Bras d'or Lakes, although around the Island cruise packages could be developed in due course • Programming would focus on superb cuisine, education/interpretation of nature and culture, and shore excursions that support this.
Rationale	• Access to the lakes is key to the positioning of Cape Breton as a place where high yield clientele can access both the wonders of nature and a wide variety of cultural experiences in a small geographic area. • Cape Breton is a safe, dramatic, intimate, "in-shore" touring destination offering upscale cruising experiences that will rank with the Galapagos for media and market appeal, over the next two decades. • Reinforces perception of the Island as a natural paradise; improves perception of access to water, in the minds of our target markets • Reinforces the Halifax home port initiative. Halifax-based ships would see value in Cape Breton itineraries (vis-a-vis Bay of Fundy, Newfoundland, etc.) and may put more Cape Breton inventory in the marketplace
Components	Itineraries which offer • Short itineraries -1,2 nights, two days. Marketed aggressively in Nova Scotia and Atlantic Canada as a luxury escape – prime target product for shoulder season, both May, June and Sept, Oct. • Longer more in-depth cruises of the Lakes – 5 nights

	• 7 day circumnavigation of Cape Breton with shore excursions at St. Peters, Gabarus wilderness, ecolodge, Louisbourg, Sydney, Pollets Cove wilderness area, and Inverness. • Variety of top end cuisine. Cuisine becomes a major part of the draw – some departures may feature a particular chef, cooking classes (in addition to the shore excursions). • On board education/interpretation of nature and culture. Links to Parks Canada and academic institutions for content. • Sold to groups as well as individuals. • Expanding convention market will buy pre and post convention sailings in the shoulder season (existence of cruise product will help secure conventions to Cape Breton) • Sold as a "next cruise" at the welcome centre in Sydney and directly to cruise passengers who have a propensity to return and to cruise again. • Sold through the web, Cape Breton and Nova Scotia tour operator partners, and as branded product (special departures and programming) through societies, media etc – National Geographic, Audubon, Smithsonian, Gourmet Magazine, etc.
Developer/ Proponents	• Private sector operator(s).
Potential Operators/ Partners	• Private investors • Municipalities – offering services, mooring, shore support • Communities working with cruise company to develop shore excursions • Local guides • Parks Canada – learning vacations content and cross promotion • Nova Scotia Tourism and Culture has 30 tour operators who would carry this type of product • Branded product developed and marketed with partners – National Geographic, Audubon, Smithsonian, Gourmet
Location/Sites	Bras d'or or Sydney base as many of the passengers will fly-in
Sustainability	Stable companies would consider this itinerary now.
Economic Impact	Significant role in getting cruise passengers to return 15 - 35 jobs on a seasonal basis, plus shore-side impacts. Impact on communities - shore excursions - hiring of local guides, purchases of shore based activities and goods by passengers
Financing	Borne by operator
Initial Implementation	Partners to recruit a working group of interested parties who will promote the value of this cruise initiative for the overall future of Cape Breton tourism, and assist/support one or more operators in developing relationships and programs that will see these types of itineraries locate in Cape Breton. Ensure they have the support and encouragement from all 3 levels government and industry.

"Safari Cape Breton" Eco-Adventure Lodge(s)

(Destination development role- hub, gateway, touring route)

Ecolodges are becoming famous the world over. They position a destination in the minds of target customer groups as well as earn revenue and drive tourism receipts in the immediate area. The ecolodge concept outlined here is aimed at the world traveller. Similar to Australia's famous *Daintree Lodge*, it will draw clientele with a nature-based experience that is unique.

Source: Daintree Lodge, Australia

These high end lodges will help define an extraordinary niche for natural experiences in eastern North America. The wilderness areas in Cape Breton they are targeted for have the dramatic natural features and interesting flora and fauna needed to create a world class, natural heritage experience.

Concept	One or more high end remote lodges, but with an array of services from four star accommodation, to fine dining, and a range of guided ecotourism and adventure activities – offering the ultimate soft adventure experience. Modelled on the East African Safari Lodges where the design and setting of the accommodation and associated ecotourism programming constitute a major attraction
Rationale	Positions Cape Breton as a world destination for wildlife viewing

	Strengthens Cape Breton as a destination area Elevates stature of Island's environmental product Opens and plays to new markets Represents a catalyst for new investment Provides better product balance and opens previously underdeveloped areas Redirects traffic appropriate to increased length of stay
Components	Key components include: Unique lodge design blending with the natural setting and with a spectacular view 10-20 unit four star or better accommodation All rooms/units with locally crafted furnishings and appointments, private baths, and facing the view Full service dining room/"bush" lounge also facing the view An "expedition room" used for briefing and outfitting for local adventure/ecotourism excursions
Developer/ Proponent	Best would be a local entrepreneur with strong hospitality industry experience teamed-up with good ecotourism partners or foreign investor targeted for the project
Potential Operators/ Partners	Existing operators in Cape Breton and/or operators of a similar concept elsewhere
Location/Sites	Good wilderness areas - Northern Cape Breton Highlands (Pollett's Cove) and/or Eastern Shore (Framboise, or Gabarus Wilderness), ideally with a view of the ocean
Sustainability	The lodge and adventure/ecotourism programs operate on for-profit basis as cited in a business case and verified by due diligence
Economic Impact	New employment, new incremental household income, expanded GDP, elevated tourist receipts because of increased numbers, length of stay and high yield of this market segment
Financing	Government Developer Other
Initial Implementation	Partners to validate business case, negotiate funding, confirm project components and phases, establish time lines.

"Trails for All Seasons" Development Plan

(Destination development role - Gateway, hub)

It could be argued that much of our potential in the outdoor nature market and particularly the shoulder and winter nature market depends on having a comprehensive trails strategy which will state how we will define and care for trails over the coming decades. In the near term significant investment will be made in this opportunity through research, which will identify our trails inventory, and our requirements for the future to ensure Cape Breton has the various trail systems it needs to address tourism and recreational needs on a year-round basis.

Concept	A trails strategy that outlines the detail of an overall approach to trails development in Cape Breton. The overall goal is to make Cape Breton a trails destination on a year-round basis for hiking, biking, trail riding, backcountry adventures, snowmobiling, cross-country skiing, snowshoeing. It will be important to segregate incompatible uses where appropriate (e.g. motorized vs. non-motorized), and ensure high standards in trails development in order to become the best multi-use trails system in Canada and known for trails-based activities such as hiking, cycling,cross-country skiing and snowshoeing. The trails infrastructure needs to be well-conceived in terms of routing and trail planning (points of interest, access to existing and new tourism and recreational services ranging from accommodations to outfitting and guiding). Connectivity with other trails systems such as those already developed in each of Cape Breton's Counties, Cape Breton Highlands National Park, plus the Trans Canada Trail. Of particular interest is the opportunity to package trails experiences with other products including accommodations, attractions, meals and transportation. Trails' interpretive potential, based on following historic routes or travelling to unique natural features and viewpoints should be important considerations.
Project Components	A comprehensive review of the current trail inventory, the market match outlined in the Road Map and The Nova Scotia Product Market Match Study and other data. Trails strategy will outline types of trails required, their link to market opportunities, their current development stages and a required action plan which is consistent with the vision and goal of the Road Map. For consideration will be: Walking/hiking trails Cycling trails Marine trails (e.g. sea kayaking) Wildlife viewing trails Scenic trails Snowmobile trails

	Cross-country skiing, snowshoeing, and winter trekking trails
Rationale	Much of the outdoor and nature product/market potential lies in the plan and design of a comprehensive year-round multi-use trails systems Outdoor and nature is one of the 4 major product/market categories for attention
Location	Island-wide
Partners	Government Communities Local tourism industry
Initial Implementation	Partners undertake trails study.

11 – ORGANIZATION AND IMPLEMENTATION

The Cape Breton "Tourism Road Map" is more than just a marketing plan. It is an integrated go-forward strategy that brings together many infrastructure and programming development projects and marketing initiatives into one collective plan for the future – an aggressive blueprint that will help build Island tourism revenues to the $400 million level by the year 2008. The plan is comprehensive; its success depends on many organizations working together. Therefore, integration of effort around this common goal will be *the single most critical element for success.*

This makes the organizational model we choose to get the job done all that much more important. It must be a model, which enables a partnership effort by many organizations. It must be an action-oriented model, driven by a partnership with the will to succeed and the resources necessary to act. This means municipalities, provincial and federal government departments, businesses, community groups and associations all working together.

ORGANIZATIONAL APPROACH FOR IMPLEMENTATION

Recently, Cape Breton's competitors in tourism have become more focused and aggressive in marketing, promotion and the development of product appropriate to growing areas of demand. Cape Breton has taken a less aggressive approach to development of this sector. The Island's transportation infrastructure is in critical need of upgrading and, in some cases, extension (e.g. - Fleur de Lis Trail).

A change of approach is now no longer optional – *it is essential*. Given our limited resources a "Road Map" implementation model that empowers, mobilizes and fosters collaboration is required. During the input stage of the study, regions and communities throughout Cape Breton were consulted. Stakeholders recognized that, although neighbouring communities had been competitors in the past, there was consensus that Cape Breton must come together as *one Island community* to ensure a sustained and successful tourism industry.

The key to the successful implementation of the Tourism Road Map is the interest and commitment of the key stakeholders (the private sector, as well as the federal, provincial, and municipal governments and First Nations), to participate in the funding of all aspects of the strategy. The growth of the industry and the attainment of the target of generating $400 million in tourism revenue by 2008 are premised on the stakeholders working in concert to implement the strategy and their commitment, within reason and available resources, required to finance the various initiatives.

Cape Breton Tourism: More than an Industry – a Strategic Sector

Traditionally, the tourism "industry" in Cape Breton was primarily perceived to be the few hundred tourism businesses active in operations – primarily the infrastructure that enables people to move around such as the hotels, tour companies, and transportation businesses that serve visitors. However, it is the Island's compelling and unique character that captures the attention of visitors. The culture, heritage and natural beauty of Cape Breton are its core products. The many organizations that develop and husband this product are integral partners in this sector. They are essential to the eventual success of the "Road Map". When we treat tourism as a sector, we engage the resources and attention of many more organizations, perhaps thousands, in a coordinated effort.

Achieving the ambitious goal of $400 million in total tourism revenues by 2008 will require a level of coordinated effort that may be unprecedented in recent times. The future of Cape Breton tourism requires that sector stakeholders coalesce around a framework that includes all levels of government and their departments, businesses, private sector associations, community groups and even volunteers. A partnership approach is fundamental to the concentration of effort needed at the operational level and to secure the necessary infrastructure and packaging to attract more visitors. It will also elevate partnership marketing to a new level never previously achieved in Cape Breton.

Need for a Strong Collaborative Partnership

The partnership model is not about entitlement – it will not "give" things to individuals, communities or organizations. Involvement will be for the greater good and Cape Breton as a whole. Participants/partners will bring manpower, expertise and money to the collective, knowing that collaboration is the only way to leverage combined resources.

An effective implementation plan must be sensitive to the number of organizations and mandates that are already in the field. Some of the organizations currently active in the tourism sector in Cape Breton include:

- Federal government agencies and departments

- Provincial government agencies and departments
- Municipal government agencies and departments
- Tourism operators
- Travel trade
- Tourism support services
- Nature based organizations and groups
- Retail
- Community groups
- Special project groups
- Industry organizations and associations at the national, provincial, Cape Breton, municipal, and local levels
- Institutions of advanced learning
- Major enterprises that supply services
- Culture related organizations and groups.

Implementing the Vision

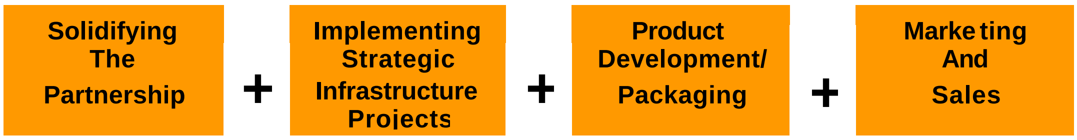
Gradually new partners may need to be recruited with the view that a partnership will be in place by summer/fall 2003. In the short term, the management and staff resources required to support this effort will be seconded from founding partners. Under the direction of the partnership, a destination marketing program will be developed and initiated by the fall/winter of 2003.

This broad collaboration of interests in the tourism sector, and beyond, will work collaboratively to create a tourism "economy". The partnership and the associated destination marketing program will work to support the following vision:

> *"We will build a tourism economy in Cape Breton that engages all stakeholders affected by tourism and distributes benefits throughout the Island. By enhancing/creating attractions and experience-based packages, and effective marketing channels, we will bring long-term revenue growth to the tourism sector in Cape Breton. By sharing our identity with visitors we build the pride and confidence that will power Cape Breton's economy into the 21st century."*

All programs and activities of the partnership and its staffing resources will focus on addressing the overall Tourism Road Map goal – increasing tourism revenues from $230 million to $400 million by 2008. The key components of the overall program that needs to be implemented by the partnership are shown in Figure 11.1.

Figure 11.1: Components of Implementation Program



Source: Study team analysis

How the Partnership and Destination Marketing Program Will Work

The partnership will be a broadly representative group comprised of senior management from major organizations with the resources and mandates to act collectively to develop a more vibrant tourism economy. The presence of senior management will ensure leadership is in place to inspire collective action, cooperation and commitment to a shared goal. Their role will be to implement the above-noted implementation program components.

The partnership will direct a core group initially, and subsequently the overall destination management program (DMP) when the funding formula is in place. The DMP will shape, implement and manage core and partnership programs in product development and marketing that are of strategic importance to the implementation of the "Road Map" over the next five years.

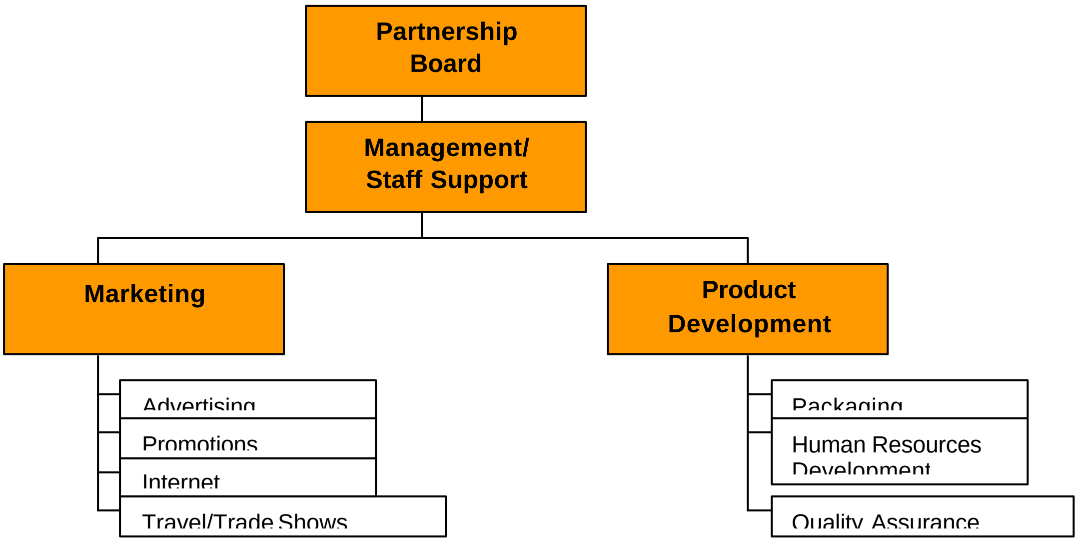
This partnership model should lead to successful implementation for the following reasons:

- Coordinated effort is the single most important issue for successful implementation of the Road Map.
- We need new products, new packages and new approaches to marketing; this structure is designed to support this need in an integrated way.
- The partnership supports organizations that have the mandate and the marketing/product development resources to take action and it combines public and private efforts for maximum impact.
- It is easier to get non-traditional government departments to cooperate if the partnership is presented as a broad integrated effort, not just a tourism industry initiative.

- Maximum coordination, speed and be results-oriented

The partnership is not an association but a partnership of organizations with a common interest in seeing the tourism sector grow and the Road Map goal achieved. The partner organizations will bring their resources and activity to bear on that goal. The proposed overall structure of the partnership is shown in Figure 11.2.

Figure 11.2: Cape Breton Tourism Partnership Structure



Source: Study team analysis

In the transition stage, the Partnership Board will consist of senior managers from the founding partners who are creating the partnership. They are key industry stakeholders who currently:

- Manage major organizations active in the tourism sector through operations, funding or policy activity
- Are actively doing things – funding, infrastructure proponents, major operators of public attractions, etc.
- Agree to refine their organizational planning over time to help/encourage strategy implementation.

Initially, the Partnership's staff may be seconded by founding partners and located in facilities contributed by the partners.

The overall partnership structure we are proposing will, therefore, have the following characteristics:

- **The proposed structure is a framework.** Once agreed upon, it should be vetted among prospective partnership participants. The model should be advanced as a working framework. Prospective partners should be canvassed for their suggestions and commitment. Communications should emphasise the importance of the partnership approach in the implementation of the "Road Map". It should also stress the vital need to optimize participation. Discussion of the model should be given a reasonable period of time, but it should be remembered that near term commitment from key action oriented partners is required –reaching the goal on schedule demands it. A Key task of the partnership is to initiate a strong destination marketing program early on, so that the necessary resources can be put in place. Communities and industry should be briefed and asked the question – "how would you like to get involved?" In this way, various groups will engage in defining their own roles in the context of the overall framework.
- **Some groups will immediately engage, others will not.** Work should be started with those who are the most keen to participate. Other groups will take longer to become participants. Energy must be spent with those who are ready to take action – communicating about best practices will bring many tentative groups on board in due course.
- **Not an association.** The partnership is not a tourism industry association, but rather an action group of players with major resources, working on common goals. Note that TIANS stands outside the Nova Scotia Tourism Partnership Council (TPC) model provincially because it is a lobby group.
- **Not an entitlement program**, but rather a true partnership taking collective action.
- **The Task Force has emphasized the need for leadership** and professional management of the implementation process, which has been incorporated into the proposed structure.
- **Marketing.** History has shown that strategies that address only product development do not lead to major market change. A jointly funded major marketing investment will be critical to overall success. Ideally, funding will be secured from several sources including industry.

FINANCIAL FRAMEWORK

The partners will address ongoing operational requirements associated with implementation of the Road Map, based on seconded personnel, contributions in kind, and funding. The target commitment is for the near term.

Partnership Helps Define Funding Formula for Destination Marketing Program

The following are potential partners who would address the funding and operational needs of the partnership. Pooling of resources will be required under a formula that identifies how core activities will be funded. A visitor's tax and Causeway toll may be appropriate funding sources to consider given experiences elsewhere in Canada. With or without this, the following partners may be in a position to provide funding and/or in-kind contributions:

- Municipalities
- ECBC
- Nova Scotia Tourism and Culture
- Tourism businesses
- Non-traditional partner sponsors like corporations
- Parks Canada
- HRDC
- Institutions of Advanced Learning.

Marketing Funding Requirements

This partnership initiative would be based on significant contributions from the tourism sector, as well as possible public sector partners. Possible sources of funds could include:

- Some form of visitors tax, if practical and acceptable
- Possible revenue from a Causeway toll, if acceptable
- Nova Scotia (partnership funds only)
- ECBC (partnership project funds only)
- Municipalities
- Tourism businesses

- Tourism Atlantic
- Canadian Tourism Commission (CTC)
- Other sponsors and partners, traditional and non-traditional.

Product Development Funding Requirements

Product development activity will be largely a "funding coordination" effort under the banner of the destination marketing program. There are many existing funding sources with mandates that are consistent with the product development needs of the Road Map. The role of the product development group is to help coordinate this activity in the context of the Road Map structure and goal. Partnering with municipal staff to facilitate delivery of this activity at the community level will be important – product development implementation funds will be used for:

- Training around product development and travel trade channels
- Yield training (see Chapter 12)
- Tourism Corps development (see Chapter 12)
- Community field workers who facilitate product and package development
- Liasing locally with municipalities and others.

Possible sources of product development funds could include:

- HRDC
- Province of Nova Scotia
- CTC
- Sponsors
- ECBC
- Municipalities
- Tourism Atlantic / ACOA

ACTION PLAN

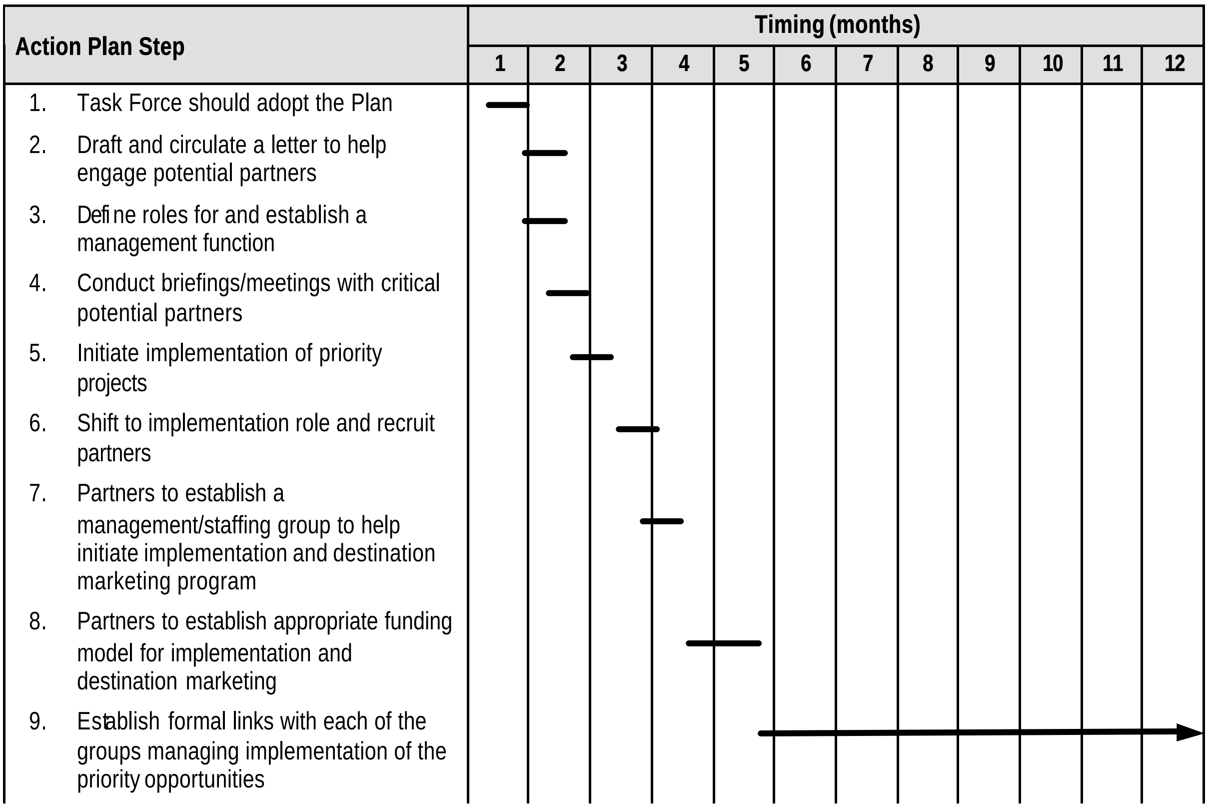
This Action Plan outlines key steps and the roles of key stakeholders in implementing the Cape Breton Tourism Road Map plan. The various steps and approximate timing are shown in Figure 11.4 and described in the following paragraphs. The focus is on Year 1, although many of these initiatives are ongoing and will be continued in subsequent years.

1. **Task Force should adopt the Plan**. The Task Force should adopt the Cape Breton Tourism Road Map Plan in principle. This means that it is not necessary to agree with every detail in the document, but rather, the Task Force supports the overall direction, the vision, strategic thrusts and strategies of the Plan and can work to fine-tune any details as required. It is important to recognize that the Plan is a "living document" which needs to be updated and refined on a regular basis.

2. **Draft and circulate a letter to help engage potential partners**. This letter would describe the plan in an executive summary format and promote the need for collective effort among many partners. It would outline the vision, goal and other key components of the plan and invite interest from various potential partners and groups. Personal letters would be sent to key potential partners.

3. **Define the roles for and establish a management function** to support the Task Force and Board as it moves to recruit partners and establish a destination marketing program.

Figure 11.4: Tourism Road Map First Year Action Plan



10. Work with the leaders of the other sector task force groups
11. Circulate Road Map Plan broadly within Cape Breton community
12. Host an annual tourism sector round table
13. Launch destination marketing program
14. Undertake ongoing monitoring and evaluation

Source: Economic Growth Solutions Inc.

4. **Conduct individual briefings/meetings with critical potential partners**. The Plan will need the support of partner organizations, such as ECBC, Parks Canada, Nova Scotia Tourism and Culture, the municipalities, other sector Task Forces, etc. Individual briefings with senior managers should occur. This will help set the stage for establishment of the partnership. It will be very important at this stage to get agreement in principle to support the partnership implementation model. There will be a number of details that the partnership will deal with, as it constitutes itself. Critical to early success is the will by key partners to work within this framework.

5. **Initiate initial implementation of priority projects**. Proponents begin immediately to implement appropriate Road Map product development projects such as those prioritized in Chapter 10.

6. **Shift to implementation role and recruit partners**. It is important to ensure that a core partnership group (initial board) is in place by summer 2003.

7. **Partners to establish a management/staffing group** to provide support in the implementation and help to initiate the destination marketing program.

8. **Partners to establish an appropriate funding model for implementation and destination marketing**. This model would be worked out with the Task Force/partnership members and would address resources required for implementation, marketing and product development activities as outlined in the Road Map plan.

9. **Establish formal links with each of the groups managing implementation of the priority opportunities**. It is important to ensure they are briefed about the content of the Road Map plan and the liaison

roles outlined – to help both the overall Partnership and the individual projects establish important communication links.

10. **Work with the leaders of other sector task force groups**. This would involve open discussions around mutual ongoing opportunities. Seek ideas about key ways in which all sectors can cross-promote each other's plans and activities. Define "in-kind" opportunities for support of the IT requirements and the ways in which the tourism sector can support others.

11. **Circulate the Road Map plan broadly within the Cape Breton community**. In addition to providing an overall "blueprint" for the development of Cape Breton's tourism industry over the next 5-10 years, this Plan contains considerable market information, analysis and concept development ideas that can be used by communities, associations, businesses and individual entrepreneurs to help them with their tourism development, packaging and marketing activities. Therefore, we recommend that this document be circulated widely within Cape Breton to whoever is interested.

12. **Host an annual Cape Breton tourism sector round table** . This meeting would seek to engage key partners as participants in collective work. The tone of the meeting would be that of a symposium, with many partners presenting, working together, and sharing ideas. It would be focused on moving forward. All major partners and Cape Breton communities have said that working together on an Island-wide basis is the only way we can step up to the goal we have set. The key objective of this roundtable will be to get participants to commit to working together.

13. **Launch the destination marketing program**. Selection of the senior marketing manager is the most critical decision the partnership will likely ever make. Ensure time and resources are set aside to do this properly. The recent experience with the creation of Destination Halifax is instructive about this pre opening period. Ensure that the partnership board oversees the creation and the ongoing activities of the DMP. The board should be composed of people who represent the interest of the partners. Experience across Canada shows that DMOs that are not driven by the wishes of the investors lose partners over time and thence can become ineffective.

14. **Undertake ongoing monitoring and evaluation**. It is important for the Cape Breton Tourism Partnership and its partners to monitor and evaluate the progress of implementation on an annual basis. Each year, as part of the annual business planning process, the Cape Breton Tourism Partnership should review the previous year's accomplishments in terms of Plan implementation and lay out the specific activities and

projects in a work plan for the coming year. Partners in the implementation process should be kept up to date on a regular basis and also have a role in the ongoing monitoring and evaluation process. Each year's accomplishments can be evaluated against the work plan prepared at the beginning of the year. It is recommended that evaluation measures be aligned with those used by the Nova Scotia Tourism Partnership Council, which are:

Overall industry growth

- Revenue
- Visitation
- Transportation access
- Other measures

Marketing efficiency

- ROI
- Awareness levels

Partner participation (product development and marketing)

- Overall financial leverage
- Industry participation levels

Specific program and project evaluations

The life of this Plan, subject to some ongoing annual refinements, is expected to be 5-10 years in order to achieve significant progress in developing the tourism sector in Cape Breton.

12 – Marketing and Product Development Plan

This Plan provides a marketing and product development framework for the next five years. Marketing and product development go hand-in hand in order to ensure a strong product-market match. All product development must be market-driven. This chapter is designed to be used by the Partnership staff and partner teams set-up around markets and product development interests. Implementation groups will use this plan as a departure point for their work. It provides a marketing framework that can be used over the next 5 years to give context to detailed annual sales and media plans, once the destination marketing program and funding formula has been established.

To give context to this chapter, it is worth reviewing the 3 strategic thrusts, which drive the overall Tourism Road Map Destination Development Plan. This Chapter relates to the third of these thrusts.

The "Road Map" is a "system" that integrates the following strategic thrusts:

Enhance and develop strategic infrastructure

Integrated effort of sector partners

Aggressive sales and marketing

New products to market

The new products outlined in Chapter 10, and other products developed over time, such as those on the long list in Chapter 8, will be taken to market through the following plans. This chapter should be considered as a framework for a living plan, used and refined as more partners get involved, bringing more information and energy to the initiative.

Partnership - a theme of our marketing and product development activity

Although core marketing and product development initiatives will be undertaken by the Partnership once functional, many of the initiatives outlined here will be done in partnership with tourism sector organisations - companies, municipalities, government and private sector operators etc. The reader will see the theme of partnership in most of the plans outlined in this chapter.

Building a Destination Marketing Program

The Tourism Task Force will seek to build a coalition of organisations that have the mandate and resources to participate in product development and marketing activity for Cape Breton . This coalition will help create and oversee the activities of a Cape Breton DMO.

When fully operational the destination marketing program will manage core marketing and product development initiatives and support partnership programs in both areas. Based on a partnership model, much of the marketing work will be funded by initiatives that are paid for by partners. Beyond core functions this means industry and many other sector partners will pool their resources for more focus and power. Marketing investment decisions will be made by professional management and a committee composed of active market teams.

This is not an advisory group, it is an action group. Best practices of Canadian destination marketing organizations have shown that marketing investment decisions should be made by the organisations which invest time and money in the programs.

On the following pages the reader will find information on:

- Target markets
- Key strategies by market
- Objectives by market
- Marketing strategies
- Sales strategies
- Communications strategies
- Proposed marketing campaigns
- Product development plan
- HR development plan

TARGET MARKETS

This marketing plan highlights target markets from a customer and a geographic perspective and identifies the key objectives and strategies for each market.

The key customer target market groups are focused around "interests":

- Grand Touring
- Culture and Heritage

- Nature and Outdoor adventure
- Meetings and Conventions, Incentive Travel, Special Events

The key geographic target markets are as follows:

- Nova Scotia residents
- Atlantic Canada
- Ontario
- Quebec
- Rest of Canada
- NE USA: New England, New York, New Jersey, D.C., Florida
- United Kingdom
- Germany

Overall marketing objectives drive marketing and product development activities:

1. Increase the number of visitors,
2. Increase average yield for accommodations, meals, and activities
3. Increase overall expenditure per party.

To ensure maximum leverage, target markets will be addressed in ways which are consistent with the national approach. On the worldwide web, the CTC, Atlantic Canada Tourism Partnership and the Nova Scotia Tourism Partnership Council are all orienting themselves around markets defined by "interests". We believe that Cape Breton's key interest-based target markets fall into four key groupings, as follows:

1. Grand Touring

Once considered essential to one's education, the grand tour included cultural and natural learning experiences. Touring in recent decades has become synonymous with sightseeing. Cape Breton will reintroduce grand touring by engaging visitors in rich experiences. The following are the sub-segments:

- **Independent travellers with packaged itineraries**. This involves predetermined accommodation, typically purchased through a tour operator.

- **Independent travellers with no fixed itineraries.** These vacations are anchored around a few predetermined communities with accommodation booked, but itinerary remains flexible.
- **Group motorcoach travellers.** The consumer decides on the destination, while the itinerary and much of the visitor experience is predetermined by the tour operator.
- **Cruise ship passengers.** Passengers have the option to purchase a range of shore excursions.

2. Culture and Heritage

Well read, well-educated, internet savvy, with higher incomes, these visitors are more likely to come from outside Atlantic Canada, will stay longer and spend almost twice as much money as the average visitor to Nova Scotia. Even when they are from the region, or stay with friends and relatives, they spend more money than other visitors who share the same traits. Interested in a variety of experiences, they seek value for their money but are typically more than satisfied with Nova Scotia. They are more likely to be first time visitors. Sub-segments include:

- **Museums, historic sites.** Cape Breton's Cabot Trail, Fortress Louisbourg, and the Alexander Graham Bell museum are strong products for this market. They appreciate interpretation and information, and like to learn. Experiences which put them in touch with Cape Breton's founding cultures will be appreciated.
- **Genealogy.** This relates more specifically to those people who can trace their history to Cape Breton. It is a significant group representing a sizeable number of visitors. While family ties have become weaker as generations pass, there is an indication that Americans after 9/11, and ageing baby boomers are more interested in exploring their heritage.
- **Music, dancing and performing arts.** While there are few musical entertainers with huge drawing power, there are many people in the performing arts who can provide a valued cultural experience, and will satisfy the cultural tourist in the search for on-site entertainment.
- **Arts, crafts and antiques.** As with the music scene, there are many artists who can deliver a cultural experience that will be treasured. From a retail perspective the cultural tourist is a shopper for quality art and craft items.

3. Outdoor and Nature

These tourists share many characteristics with cultural tourists. They too are urban, educated, well-read, experienced travellers, with higher incomes, higher trip expenditures, and interested in multiple experiences. A significant percentage is more likely to come for a particular experience like a nature activity package or to experience a particular phenomena, and then build additional experiences around it.

Interests extend to cultural/historical products as well as pure nature. They value national parks and protected areas. They are members of clubs and associations for nature and conservation; word-of-mouth is an important destination choice factor. They are likely to be return visitors and are targets for a Cape Breton "clientele" approach. Sub segments include:

- **Hiking, walking and nature tours.** Cape Breton has great product to offer for this activity. Interpretation, packaging of the outdoor experience and promoting a sense of appreciation for nature are keys to satisfying this market. A long-term sustainable product will result if Cape Breton practices good environmental stewardship.
- **Bird/animal watching.** Significant product offerings are capable of attracting visitors to the destination and providing incremental product experiences to delight them when they are here. Packaging, interpretation, and guides are opportunities for continuous improvement.
- **Marine tours.** Whale-watching and marine tourism are nature experiences which some visitors build vacations around. Cape Breton has a strong opportunity to use these experiences to draw visitors.
- **Boat touring, sailing, canoeing and kayaking.** All of these water-based activities have potential to draw visitors as well as provide unique experiences, with good packaging and promotion.
- **Golfing.** This is a growth area for tourism. The proposed expansion of Cape Breton's golf course product base can be a successful travel motivator, if there is a significant promotional campaign. Cooperation among golf courses and packaging, will be essential.
- **Cross-country skiing, snowmobiling and snowshoeing.** Creating events can have some impact on the potential draw. For the short term, Cape Breton should concentrate on regional markets.
- **Bicycling.** This is primarily a packaged trip opportunity working with bicycle tour operators. Product enhancements such as signage, interpretation, look-offs and other improvements contemplated for the

grand touring market will be attractive to this group. There is potential to use special events to market to this segment.

- **Fishing.** Saltwater fishing for tuna as well as fresh-water salmon and trout are large potential draws.

4. Conventions, Meetings and Special Events

A lucrative market of higher spending visitors, who are as likely to come in May/June and September/October as they are in the peak summer season. Direct sales are effective. Close collaboration between industry and government is required to satisfy client needs. Sub-segments include:

- **Meetings, conventions and incentive travel.** There is a huge variety of needs and decision-making criteria in these markets. The decision-making process in corporate meetings will vary with the company. Sometimes rotation policies within associations require them to come east, but there is no guarantee that they will consider all communities. Airline capacity has a huge impact on some accounts, while others are reluctant to use more than one hotel. Cape Breton marketing activity in this segment must be knowledgeable, aggressive and relentless, to achieve success.
- **Trade shows and consumer expositions.** This sub-segment shares many characteristics with the meetings market, where the bulk of the attendees come from outside Cape Breton. Transportation issues and competition are factors to be reckoned with. Consumer shows and trade shows built around local industry are easier to attract, but are risky ventures if the size of the market is small. There is potential for a Cape Breton Industrial Exhibition to showcase the many businesses across the Island in the off-season.
- **Sports events and tournaments, performing arts and entertainment.** There are many existing events which may be able to move to Cape Breton. They share some traits with meetings but are also dependent on the local market. Cape Breton has shown that it is one of the best sport markets in Canada. Targeting events (of the right size) can be a successful strategy.

CUSTOMIZING OUR APPROACH TO MARKETS

Key Strategies must be tailored for each priority market. *Geography, demographics, and psychographics* can all be used to help understand or organize marketing activities.

Provincial tourism programs focus on *geographic markets*; it will be useful to use a geographic market approach when working with these partners. The Grand Touring product will likely be the lead here with cultural, heritage and natural attractions identified as key components of the touring product.

On the Internet, numerous windows can open on the Cape Breton product. This *psychographic* approach organizes product offerings around the "interests" of the customer.

Conventions and special events bring with them their own organizing groups and target audiences. These are best approached using *direct sales*.

Principles Used in Marketing Programs

Following are the key principles we are recommending for marketing Cape Breton's tourism industry:

- **Brand positioning.** Establishing a destination positioning for Cape Breton overall, and each product line, is essential. Marketing programs must be committed to building the Cape Breton brand for the long haul.
- **Customer relationship management.** The key to success will be a good understanding of the customer and a process that keeps us in touch with customers. Information Technology (IT) in both hardware and software will be used to manage customer relationships.
- **Integrated marketing.** Each of the elements of the marketing plan will work in synergy with other elements of the plan, wherever possible – the essence of cost effective marketing.
- **Collaboration.** The plan will capitalize upon the opportunity to cooperate with others for mutual benefit in industry, in communities across the Island, in Nova Scotia and Canada. By sharing customers, each operator will expand his / her customer base, and increase overall revenues. Each business or organization can be an additional sales channel for other businesses – passing visitors from one business to the next in our communities (through referrals), and from one community to another.
- **Yield management.** Revenue management techniques can help get the optimum price for a product, and generate incremental sales from customers.

Strategy Overview for the Domestic Market

One planning approach to our markets is a *geographic approach*.

Objectives for Canadian Markets are listed below in Figure 12.1. Overall, the key objective is to achieve a *higher share of visitor days* from travellers to Nova Scotia and Atlantic Canada originating in Canada, US and International markets.

Nova Scotia

There is a great opportunity to increase the number of visits by loyal Cape Breton customers from the mainland, specifically by extending the season in the October to June period. Nova Scotia is the best available market for festivals, events, sporting and cultural activities, and will support winter and shoulder season marketing initiatives.

As the nearest market, it is the best known, most affordable, and is predisposed to come to Cape Breton. The Nova Scotia market effort will be led by the Cape Breton marketing partners (work done independently of the Nova Scotia Tourism Partnership Council, as their mandate excludes marketing to Nova Scotia).This will involve direct contact with consumers by individual businesses and community marketing organisations with leisure travel promotion, as well as efforts which target niche markets such as meetings and conventions, special events, VFR and nature and cultural travel.

This market provides opportunities for affordable advertising and merchandising of destination packages. This should be a first priority market that could be targeted for annual activity starting in 2003.

As the major geographic market opportunity for shoulder and winter season, the intent will be nothing short of ***dramatically increasing*** the visitation of Nova Scotians, particularly in the off-season.

Atlantic Canada

This market is comprised of the Maritimes (New Brunswick, Prince Edward Island) and Newfoundland and Labrador. There is opportunity to increase leisure travel from these markets, using a niche marketing approach . Specifically, the meetings and conventions market should be targeted. Festivals and events, sports events, golf tournaments, hockey tournaments, curling, marathons, bicycle tours and programs such as the Island Games, will draw participants of all ages from within the region.

To keep momentum up it is important the event organisers see how their activity contributes to overall success.

The packaging of these events should include nature, culture and heritage experiences such as "We Rise Again" Festival Cape Breton" which will be a powerful draw. Currently both Nova Scotia Tourism and the CTC run major regional leisure advertising initiatives. These can be used as vehicles, which carry Cape Breton packages to this market. While collaboration with off-Island partners will be important, Cape Breton tourism partners must lead on these projects, incorporating synergies with Nova Scotia Tourism and the CTC programs. These programs should start as soon as possible for 2003.

Ontario

Nova Scotia will lead in this marketplace. Cape Breton will participate in co-op advertising initiatives led by the province and the CTC's domestic marketing program. These typically involve advertising and direct marketing, and provide a solid basis for Cape Breton tourism partners to do selling at trade and consumer shows.

Cape Breton will maintain an aggressive travel trade partner marketing program, which would target the Ontario Motorcoach Association (OMCA), Toronto based tour operators, scheduled and charter airlines, the Canadian Automobile Association (CAA) and major travel agency consortia. In addition, there are major opportunities for repeat visitation from Ontario, opportunities to develop "Cape Breton loyal customers".

Individual businesses will have a significant part to play in the consumer and trade marketing effort by implementing customer relationship management (CRM) programs to maintain communication with their own customers. A Travel Media program initiated by Cape Breton tourism partners, in co-ordination with Nova Scotia, will be particularly active in Ontario, where there are many sizeable markets which have community media. Smaller newspapers are often neglected by other destinations, which concentrate on major markets.

The Cape Breton travel message can focus on niche experiences in nature, culture, special events and festivals, as well as the grand touring market. The meetings and conventions market (associations and corporate) is based substantially in Ontario, and can be addressed with direct sales by Cape Breton tourism partners.

Quebec

The Quebec market has great growth potential, especially as Nova Scotia has increasingly targeted this market in recent years. The Champlain 400 celebrations and the Congres Mondiale Acadien will bring more focus than ever before on francophone markets, and present Cape Breton with an opportunity to make a great leap forward in Quebec and other francophone markets. There is currently a CTC product club for Acadian tourism, and

Cape Breton tourism partners are encouraged to participate and use this program to help develop local products. Such programs as the "Ici on parle Francais" program developed by Nova Scotia, and the information and interpretation programs being proposed within the Cape Breton Road Map for the Acadian Experience, will assist greatly in product development.

There should be market research and analysis done for Quebec during 2003 and appropriate advertising and promotion, in co-operation with Nova Scotia and the CTC, to impact 2004 and beyond. As well, there are large investments being made by Canada through the Department of Canadian Heritage in the Champlain 400 celebrations. Cape Breton tourism partners, working closely with Parks Canada can impact allocation of new funds to improve and extend the Louisbourg experience.

Partnership discussions, product development and media relations work can begin during 2003, but should grow into a full plan for 2004 season.

Rest of Canada

Nova Scotia plays the lead role in marketing to the rest of Canada. Cape Breton will support their initiatives such as the media relations program and CRM programs. Specific niche marketing initiatives such as marketing to VFR (visiting friends and relatives) in western Canada can be effective. Meetings and convention marketing will also address associations and corporations, who are prospects for Cape Breton, wherever they are based. Cape Breton internet marketing will draw visitors from western Canada, even though this market may not be specifically targeted. Expenditures on coop advertising are unlikely, until higher priority markets are serviced.

Figure 12.1: Objectives for Canadian Markets

Market	Visitation Objectives	Yield Objectives	Per Capita Revenue Objectives
All markets	Increase visitors by 5% in 2003, and 5% each year 2004-2010.	Increase yield in October-June by 2% in 2003-2004 as measured by accommodations properties. Increase yield in 2004 by 4% and 2004-2008 by 5% per year.	Increase per party expenditure by 5% in 2003, 2004, and 8% per year in 2005, 2006 and 5% in 2007-2010 across all markets, as measured by the Exit Survey.
Nova Scotia	Increase visitation in October – June period by 10 % by 2004	Increase yield in October-June by 2% in 2003-2004, 4% in 2004 and by 5% annually for 2004-2008.	Increase per party expenditure by 5% annually, as measured by the Exit Survey.

Atlantic Canada	Increase number of Meeting and Convention delegates by 15% by 2004 Increase leisure visitors by 5% in 2003, 2004	Increase yield in October-June by 2% in 2003-2004, 4% in 2004 and by 5% annually for 2004-2008.	Increase per party expenditure by 5% annually, as measured by the Exit Survey.
Ontario	Increase visitation from Ontario by 12% in 2004, 10 % in 2005, 5% in 2006, 3% each year thereafter till 2010 Includes. M&C Mkt. Leisure MC FIT	Increase yield in October-June by 2% in 2003-2004, 4% in 2004 and by 5% annually for 2004-2008.	Increase per party expenditure by 5% annually, as measured by the Exit Survey.
Québec	Increase visitation 2004 by 15%, 2005 by 10%	Increase yield in October-June by 2% in 2003-2004, 4% in 2004 and by 5% annually for 2004-2008.	Increase per party expenditure by 5% annually, as measured by the Exit Survey.
Rest of Canada	Increase visits by 5% year for 2004-2010	Increase yield in October-June by 2% in 2003-2004, 4% in 2004 and by 5% annually for 2004-2008.	Increase per party expenditure by 5% annually, as measured by the Exit Survey.

It should be noted that in all these market objectives, benchmark data is very thin. An early challenge of research should be to define benchmarks in these specific areas. For now, these are useful as targets which if achieved, will get Cape Breton close to the revenue goal of the Road Map.

Strategy Overview for International Market

These strategies are described in the following paragraphs.

United Kingdom and Germany

Canada, Nova Scotia, and the Atlantic Canada Tourism Partnership will lead in these markets, although it is clear that nature and marine tourism products, are strong suits for Cape Breton. These markets are expensive, so partnership marketing is even more critical than in other markets.

In order to make a reasonable evaluation of European marketing potential, much better information and research needs to be done. The impact of the travel trade, at the tour operator and travel agent level, is very important in these long haul markets. Cape Breton tourism partners who are active in Europe have learned much about how to manage travel trade relationships in these markets. A European market working group can help provide leadership to tourism partners and evaluate the opportunities for marketing investment.

Media relations presents a significant opportunity in Europe. Cape Breton should cooperate proactively with Nova Scotia and the CTC in addressing this. In 2003, a review of existing research, gathering data on travel trade and partnership marketing opportunities, as well as product development enhancements should be implemented, in order to pave the way for marketing activities in 2004 and beyond.

Objectives by market are listed below in Figure 12.2.

Figure 12.2: Marketing Objectives for International Markets

Market	Visitation Objectives	Yield Objectives	Per Capita Revenue Objectives
NE USA	Increase visitors in 2003 by 3 %, and 5% in 2004-2010	Increase yield from US accommodations purchases by 2% in 2003-2004 and 7% per year thereafter 2004-2010.	Increase per party expenditure by 5% in 2003, 2004, and 8% per year in 2005, 2006 and 5% in 2007-2010 across all markets, as measured by the Exit Survey.

Market	Visitation Objectives	Yield Objectives	Per Capita Revenue Objectives
UK	Increase visitors by 2% in 2003 and 5% per year in 2004-2007, 3% in 2007-2010	Increase yield 5% per year from 2004-2010	Increase per party expenditure by 5% in 2003, 2004, and 8% per year in 2005, 2006 and 5% in 2007-2010 across all markets, as measured by the Exit Survey.
Germany	Increase visitors by 2% in 2003 and 5% per year in 2004-2010	Increase yield 5% per year from 2004-2010	See above

POSITIONING CAPE BRETON

The following overall positioning statement is consistent with CTC and Nova Scotia positioning and puts a "stake in the ground", positioning Cape Breton aggressively as the premier touring destination in Atlantic Canada.

"Cape Breton Island is the ***premier touring destination on Canada’s Atlantic Coast*** where visitors can connect with nature, cultural, and heritage experiences on a year-round basis".

Segment positioning strategies are as follows:

- **Grand touring.** Cape Breton Island, Nova Scotia is the premier touring destination on Canada’s Atlantic Coast where you can follow the renowned Cabot Trail along scenic seacoasts, through heritage communities, and Cape Breton Highlands National Park.
- **Culture and heritage**. Cape Breton Island, Nova Scotia, where the Fortress of Louisbourg, the Alexander Graham Bell Museum and Aboriginal, Acadian and Celtic cultures are living testament to our heritage, where musicians, artists and craftspeople celebrate our culture.
- **Nature and outdoor adventure**. Cape Breton Island, Nova Scotia, where natural beauty, seacoast experiences, national parks, protected areas, lakes, rivers and the ocean, are home to abundant wildlife and are sustained by both residents and visitors.
- **Meetings and conventions.** Cape Breton Island is a great place to hold meetings, conventions and special events where delegates connect with nature and culture and planners enjoy the partnership of a co-operative, experienced tourism industry.

Marketing Planning Gap – Research Needed

There is a need for more and better information to evaluate results, plan future initiatives, and understand customers, markets and our competitors' strategies. Based on a thorough review of research conducted by Nova Scotia, ACTP, CTC and other partners, the Cape Breton Tourism Coalition will encourage collaboration to answer fundamental questions of importance to tourism marketing.

- Establish a statistical benchmark for all tourism products and markets as a comprehensive template for future research.
- Updated and detailed profiling of customers to understand their needs/activities.
- Expenditure surveys which give accurate data on consumer activities.
- Return on Investment measurement of all marketing programs, measuring conversion success. This is important in campaigns managed by other partners such as the CTC and NS Tourism, where results should be evaluated to the Cape Breton level.

Competition

Cape Breton is competing with any destination that competes with Canada, Atlantic Canada, or Nova Scotia. When people do decide that a portion of their trip will be in Atlantic Canada, Cape Breton is competitive with other regional destinations for share of market. However, Cape Breton must foster co-operation. The more Cape Breton is featured in marketing materials with Nova Scotia, Atlantic Canada, and Canada, the more the Cape Breton's share of business will increase. Some specific competitors for products are as follows:

- **Golf product**: Prince Edward Island
- **Meetings and Conventions:** Destination Halifax
- **Nature and Outdoor Adventure:** Newfoundland and Labrador, New Brunswick, Maine
  - Bird-watching:
  - Whale-watching and Marine Wildlife:
  - Walking and Hiking:
- **Culture and Heritage:** Newfoundland and Labrador, Halifax
- **Grand Touring:** New Brunswick, South Shore of Nova Scotia.

Marketing Strategies

Building from strength our core strategy is to *expand sales from existing markets*. We will expand sales in existing markets by:

- Increased market penetration through partnerships, aggressive promotion, and packaging.
- Product development through program and infrastructure development, to better meet the needs of existing markets, expand the customer base, and increase visitor expenditures.
- Niche market serendipity – getting new customers from existing and new markets when they respond to our niche marketing initiatives on the web.

Sales Strategies

There are several key sales strategies, which are discussed in the following paragraphs:

- **Customer relationship management (CRM).** This is essentially direct sales to existing customers. We stay in touch with them and entice them to come back, with targeted offers that include product enhancements focused on their interests. Powerful "word of mouth" results flow from this.
- **Direct sales.** There will be aggressive online selling, as well as selling at the Welcome Centre and selling with co-op partners direct to consumers. Every opportunity to turn existing VIC's into sales centres will be pursued.
- **Packaging.** Packaging is essential to draw visitors to specific destinations and activities. Travel Trade partners will assist with this process, but there is an onus on local industry to create packages, especially where the consumer wants to deal directly.
    - *Activity, experiential packages.* Visitors come to Cape Breton for a specific purpose but branch out and find additional experiences. These packages must be built around market ready, quality, competitive products.
    - *Multiple activities packages*. Multiple activities provide the *quantity* of experiences necessary to attract visitors, perhaps in the absence of one perceived world-class product / experience. Travel decisions often involve several people, so providing a quantity of experiences may be a practical compromise. It is known that the Culture and Nature markets enjoy a variety of experiences on the same vacation.
    - *Destination packages.* Revolve around a particular destination which may act as a hub, with additional activities available surrounding that

area. This packaging is used where there is a well-known destination like Baddeck, ("Spring in Baddeck"), Bras d'Or or Cape Breton Highlands or in combination with meetings and conventions.

A comprehensive inventory of *day trips*, is needed, responding to a variety of interests. New Brunswick's "Adventures Left and Right" program is probably the most successful such package program in Canada, and it should be the model for a "Cape Breton Day Adventures" program.

- *Touring Packages.* The Travel Trade are adept at creating their own touring packages, and will make incremental changes to improve itineraries. The real opportunity is to reach touring customers who have not purchased a package and are travelling on their own.

  A good array of packages can help visitors define their itinerary and allocate more time to Cape Breton than to other parts of Atlantic Canada. The Cape Breton Day Adventures program is an effective tool to help any touring visitor find good experiences wherever they are on the Island. These should be aggressively promoted with point of purchase material (POP) in tourist bureaux and other public places.

- **Travel trade.** This sales channel will be important in both the wholesale and retail environments. Motorcoach Tours, FIT operators, Inbound Operators and Tour Operators in the Outdoor Adventure market are prime targets. Participation in major industry trade shows, such as Rendezvous Canada, NTA, ABA, OMCA, Atlantic Canada Showcase, as well as cruise industry shows are important opportunities for Cape Breton. Travel Agents are changing to meet the times and should be assessed as potential sales channel partners. Certainly the CAA and AAA clubs will be prime targets for relationship building and sales. Online travel agencies and travel sales sites are great new opportunities, and should be evaluated for use.

- **Promo/hallmark events.** This kind of activity can grow visitation exponentially and should be used to promote certain kinds of activity packages, especially where clubs, associations or niche media can be reached by a well-run event. Winter events in cross country skiing or snowmobiling, bicycling events like the Cabot Trail Tour, bird, wildlife or marine wildlife migrations, as well as cultural events like Celtic Colours are great examples of potential or real events, which can draw visitors.

- **e-commerce**. This must be a major thrust of the Cape Breton marketing effort. It is described in detail in the product development section (Chapter 10), and is an essential piece of tourism infrastructure. E-commerce is the online extension of CRM and works hand in hand with aggressive sales in visitor information and Welcome Centres.

Communications Strategies

We are recommending the following communications strategies:

- **Media relations.** This should be a core activity of the Partnership. It has (arguably) the highest return on investment; most of the resources invested are ideas and staff time. Electronic media and publications can be targeted based on the quality and quantity of the reader / viewer. Increasingly, materials prepared for / by media can live on the Internet as well. There will be some resources necessary for hosting media tours, although these can often be "in kind" contributions.
- **Industry relations.** This can be both internal in the tourism sector, or external with the many industry organisations across the country and local partners. The Cape Breton Tourism Partnership should be the best partner that any tourism business on Cape Breton could want. Collaboration will bring more business, and close collaboration will also bring access to the planning and inner circle of tourism in Canada.
- **Government relations.** Since government is a major player in tourism in Canada, the Cape Breton Tourism Coalition should be aware of issues from a government perspective at the federal, provincial and municipal levels, with the intention of advancing marketing programs.
- **Internet communications**. Through the use of web sites and linkages, organised as a portal, information can be communicated to customers from the perspective of their "interests". Thus consumers can be reached at very low comparative costs. When backed-up with booking and transaction software, the E-commerce model is complete.
- **Advertising.** Cape Breton should invest in co-op advertising campaigns organised by Nova Scotia, Atlantic Canada, and Canada. Provided that priority markets are chosen, media is appropriate, and the Cape Breton message is clear, these coop campaigns can multiply the impact of the Cape Breton advertising investment. They also offer opportunities to get images and packages into the ads, and build rapport with partners, opening the door to other opportunities. Advertising campaigns targeting provincial and regional markets are also an essential part of the marketing effort, which can be led by Cape Breton tourism partners. Niche campaigns in cooperation with partners in the Nature, Culture or Meeting and Convention markets will also be effective.

- **Promotional material**. Web materials, photography, video clips, media material, point of purchase (POP) material and brochures will be required. These are essential tools in the campaign to convert visitors who are seeking information at Welcome centres, and VIC's, into customers. Often by having media materials readily available, a destination can take advantage of opportunities that others may miss. This is particularly true of photos, video clips and editorial material.

PROPOSED MARKETING CAMPAIGNS

We are recommending specific marketing campaigns for each of the major geographic target markets.

Nova Scotia Market

Core Cape Breton Marketing Activities

As there are no CTC or Nova Scotia partnership opportunities that sell into the provincial market, all campaigns aimed at mainland Nova Scotia must be managed entirely by Cape Breton tourism partners. This is an important market that should be addressed annually, as follows:

1. *CRM activities* managed by individual businesses collaborating within the Cape Breton e-commerce program. This would involve electronic creative material on upcoming festivals, events and attractions, as well as new packages, which integrate vacation experiences.
2. *Media Relations* management activities managed by the Partnership on behalf of the whole of Cape Breton.
3. *Travel Trade relationships* with the regional players such as Via Rail, Atlantic Tours, Taymac Tours and other players will be managed as key sales accounts.
4. *Niche marketing* activities targeted at the meetings & conventions market, trade & consumer exhibitions, the sports events market, clubs and associations in the nature, marine and outdoor markets, VFR markets and other markets as identified can be driven by Cape Breton tourism partners. Tools include personal sales, electronic communications, and direct mail.
5. *Off-season promotional programs* targeted on Halifax should become annual campaigns. There should be a major integrated campaign using traditional media such as TV, radio and print with internet sales support to sell packages online, and through Check InnNS.

Atlantic Canada Market

Core Cape Breton Marketing Activities

Recommended annual marketing activities for Atlantic Canada include:

1. *CRM activities* managed by individual businesses collaborating within the Cape Breton E-Commerce program. This would involve electronic creative material on upcoming festivals, events and attractions as well as new packages, which integrate vacation experiences.
2. *Media Relations* management activities managed by the Partnership on behalf of the whole of Cape Breton.
3. *Travel Trade relationships* with the regional players such as Maxxim Vacations, Tours Acadie, Atlantic Tours and other players managed as key sales accounts. *Niche marketing* activities targeted at the meetings & conventions market, sports events markets, clubs and associations in the nature, marine and outdoor markets, VFR markets and other markets as identified can be driven by Cape Breton tourism partners in collaboration with Nova Scotia Tourism. Tools include personal sales, electronic communications, and direct mail.

Cooperative Marketing Opportunities

These are areas where Nova Scotia Tourism and Cape Breton tourism partners can cooperate closely.

1. Advertising with the Nova Scotia Tourism campaign in New Brunswick, Prince Edward Island and Newfoundland and Labrador.
2. CTC Domestic marketing program offers co-op advertising programs, which distribute special sections on Canada tourism product to all Atlantic Canada markets.
3. Niche marketing campaigns built around major festivals and events such as Celtic Colours.

Ontario Market

Core Cape Breton Marketing Activities

These activities would include:

1. *CRM activities* managed by individual businesses collaborating within the Cape Breton E-Commerce program. This would involve electronic

creative material on upcoming festivals, events and attractions as well as new packages, which integrate vacation experiences.

2. *Media relations* management activities managed by the Partnership on behalf of the whole of Cape Breton. Photography, video / film footage and story ideas / actual stories will be proactively offered and a contact database kept on media throughout the market.

   Relationships with media officers from Nova Scotia, ACTP, CTC, Canadian Consulates, and major industry partners will help foster opportunities. Co-ordination with industry will secure accommodations, meals, tours and other hosting activities. Measurement of results will be carefully undertaken to provide a return on investment assessment, and to maintain productive relationships.

3. *Travel trade relationships* will be managed as key sales accounts. These relationships will include Tour Operators, Tour wholesalers and Inbound Operators currently servicing the market with both group and individual leisure products. Airlines, both charter and scheduled will be an important part of the travel trade program. Allies within the Nova Scotia Tourism, ACTP and CTC agencies will be partners in many of these endeavours. This will be managed by a staff person, who will also ensure statistics are captured and programs are evaluated.

4. *Niche marketing* activities targeted at the meetings and conventions market, the sports events market, clubs and associations in the nature, marine and outdoor markets, VFR markets and other markets can be driven by Cape Breton tourism partners in collaboration with Nova Scotia Tourism. Tools include personal sales, electronic communications, and direct mail.

Co-operative Marketing Opportunities

These are areas where Nova Scotia Tourism will lead and Cape Breton tourism partners will multiply (available) resources through partner marketing in established, subsidized programs, in markets of priority.

1. Advertising with the Nova Scotia Tourism campaign in major markets such as Toronto, Southern Ontario and Ottawa.
2. CTC Domestic marketing program offers co-op advertising programs, which distribute special sections on Canada tourism product to all markets. It is possible to purchase the Ontario market on its own.

3. Niche marketing campaigns, typically magazine campaigns for nature tourism markets, in co-operation with CTC or Nova Scotia Tourism.

Quebec Market

Core Cape Breton Marketing Activities

The following marketing activities should be undertaken:

1. *CRM activities* managed by individual businesses collaborating within the Cape Breton E-Commerce program. French language material will be developed to assist with this communication effort.
2. *Media Relations* management activities managed by the Partnership on behalf of the whole of Cape Breton. French language capability will be required to maximise effectiveness. Media Fams will be important.
3. *Travel Trade relationships* and trade and consumer show opportunities will be managed as key sales accounts. Salon Vacances, Bienvennue Quebec and other trade and consumer shows will be important. Trade Fams will be key to expanding sales activity in this channel.
5. *Niche marketing* activities targeted at the corporate meetings market, the sports events market, clubs and associations in the nature, marine and outdoor markets. Tools include personal sales, electronic communications, and direct mail, with French language communications support being provided by the Partnership staffing.

Co-operative Marketing Opportunities

These are areas where Nova Scotia Tourism will lead and Cape Breton tourism partners, will multiply (available) resources through partner marketing in established, subsidized programs. Advertising with the Nova Scotia Tourism campaign in major markets such as Montreal, Quebec, and the Eastern Townships.

1. CTC Domestic marketing program offers co-op advertising programs, which distribute special sections on Canada tourism product to all Quebec markets.

New England / Northeast USA Market

Core Cape Breton Marketing Activities

These should include the following:

1. *CRM activities* managed by individual businesses collaborating within the Cape Breton e-commerce program.
2. *Media Relations* management activities managed by the Partnership on behalf of the whole of Cape Breton.
3. *Travel Trade relationships* will be managed as key sales accounts. These relationships will include tour operators, tour wholesalers and inbound operators currently servicing the market with both group and individual leisure products. NTA, ABA, AAA, and Sea Trade, will be important marketplaces for this sales effort. Airlines, both charter and scheduled, will be an important part of the travel trade program.
4. *Niche marketing* activities targeted at clubs and associations in the nature, marine and outdoor markets, can be pursued in cooperation with speciality tour operators working for Smithsonian, and *National Geographic*. Canadian Sailing Expeditions can give strategic entré to these relationships, with a high end Cape Breton / Bras d'or Lakes cruise. VFR markets and other markets, as identified can be driven by Cape Breton tourism partners, in collaboration with Nova Scotia Tourism. Tools include personal sales, electronic communications, and direct mail.

Cooperative Marketing Opportunities

These are areas where Nova Scotia Tourism will lead and Cape Breton tourism partners, will multiply (available) resources through partner marketing in established, subsidised programs, in markets of priority.

1. Advertising with the Nova Scotia Tourism campaign in New England and Northeast USA.
2. The CTC's USA marketing program offers co-op advertising programs in these markets, and also opens the possibility of programs designed in Cape Breton / Nova Scotia being funded by the CTC. More study of the market is required for Cape Breton tourism partners to take on this leadership, but that can evolve in future years.
3. Niche marketing campaigns, typically magazine campaigns for nature tourism markets, in co-operation with the CTC or Nova Scotia Tourism.

United Kingdom and German Markets

Core Cape Breton Marketing Activities

The UK and Germany are markets where the CTC and Nova Scotia Tourism will lead and Cape Breton tourism partners can multiply (available) resources through partner marketing in established, subsidised programs, and by doing core marketing activities in support of these campaigns.

1. *CRM activities* managed by individual businesses collaborating within the Cape Breton e-commerce program.
2. *Media Relations* management activities managed by the Partnership on behalf of the whole of Cape Breton. Media Fams will be important.
3. *Travel Trade relationships* will be managed as key sales accounts, in co-operation with Nova Scotia Tourism. These relationships will include Tour Operators, Tour wholesalers and Inbound Operators, currently servicing the market with both group and individual leisure product. Scheduled and charter airlines will be valuable relationships. Trade Fams will be important.
4. *Niche marketing* activities targeted at clubs and associations in the nature, marine and outdoor markets. Tools include personal sales, electronic communications, and (to a lesser extent) direct mail.

Co-operative Marketing Opportunities

1. Advertising with the Nova Scotia Tourism / CTC as resources permit in United Kingdom and Germany.
2. Trade Shows which target the European market such as Rendez-Vous Canada, ITB Berlin, the World Travel Mart, and others, can be worked in conjunction with Nova Scotia Tourism, ACTP, and the CTC, based on recommendations of the Europe working group.
3. Cape Breton should explore opportunities to cooperate with Newfoundland in packaging and marketing aimed at the European market. Airlines and Ferry operators will be allies in this campaign.

PRODUCT DEVELOPMENT PLAN

The roles of product development in the overall "Tourism Road Map" are as follows:

1. Support the major new infrastructure projects or enhancements to

infrastructure required to meet the needs of target customers, and expand penetration of existing markets, or help enter new markets.

2. Provide programming that supports current infrastructure, by adding new experiences that complement existing product. It is particularly important to enrich visitor experiences in nature, culture and seacoast products, as a way of drawing visitors into less travelled areas of the island.
3. Create packages that combine various products, thereby making the products easier for the target market to buy. These packages must satisfy customer needs and be available for sale directly to customers and through the travel trade, in both the retail and online settings.

What is a package?

A package is a tourism experience which:

- Is a unique experienc e that did not exist before
- Is complete and sold by one vendor in a single transaction for a single price
- Is one or more compelling experiences, including all services
- Offers savings or value add elements

Two types of packages will be developed

1. Cape Breton adventures
2. Cape Breton day adventures

The two primary types of packages are those which include accommodation (Cape Breton adventures) and those, which are designed as day trips (Cape Breton day adventures) to capture a particular experience and extend the visitors stay in a particular area. Both types of packages are included in Tourism Road Map activities.

Levels of Sophistication in Packages

Packages can be developed simply, involving a few community based operators, or built into elaborate multi-partner relationships that use one or more distribution channel partners for distribution.

In the initial stages the package development done as a part of the Road Map plan will involve basic community based package development. This will entail the creation of packages that are developed among two or more operators who choose to market the experience through mailers, their own web sites and the Cape Breton Portal.

In due course more sophisticated packages will be developed, involving longer and more complex itineraries under the cultural and nature product banners. As sophistication grows and ground operator partners come on board, this product will be distributed broadly through the travel trade.

Partnership Structure Fosters Marketing Product Development Linkages

Since product development initiatives frequently bring various businesses together in an alliance to permit customers to buy in the format they choose, these alliances will become natural marketing partnerships. Product development and marketing are, therefore, different sides of the same coin and must work closely together for either to be effective. The structure and operational methods of the DMO model are designed to encourage this.

Note that the organisational structure outlined earlier in Chapter 11 also shows this "mirrored" approach to the integration of product development and marketing

Priorities for Product Development

Product development is a major area of activity at all levels within Canada because it is seen as a realistic way to interpret visitor experiences and tailor those experiences to each customer segment. There are product clubs at the national, regional, and provincial levels, which help organise industry and government partners around opportunities for product development. It is essential that Cape Breton make maximum use of lessons learned in this process by participating in existing product clubs and structuring new product development initiatives to follow the product club model.

The product development plan put forward by Nova Scotia Tourism and Culture identifies product development priorities and programs which are very much in line with those of Cape Breton.

Product development can be initiated by industry, government, the travel trade, and communities themselves. This plan envisions a major role for communities in identifying opportunities to increase and improve tourism product.

Major new infrastructure projects will be the catalyst for new auxiliary products. Changes in traffic flows will open up further opportunities. Affinity groups (birding for example), as well as geographic communities, will see product development and packaging opportunities, and may make use of existing provincial programs for support.

The Nova Scotia product development program identifies the following as opportunities for support, all of which are in synergy with the initiatives and approaches outlined in the Cape Breton Tourism Road Map.

- Tourism product development and enhancement, which includes tourism planning; interpretation development; tourism infrastructure; tourism programming; tourism (highway) signage.
- Tourism market readiness, which includes study tours/ best practice missions; seminars, workshops, conferences, professional development, mentoring assignments; trade smart, French readiness; sustainable tourism initiatives at the community level such as baseline situation analysis, training, and planning.

Leveraging Existing Product Clubs

The Cape Breton Road Map product development plan is intended to encourage industry and communities to work diligently on product development and deliver the product to the sales channels, doing so in co-operation with others who are currently working on the same priorities. There are existing product clubs which are relevant for Cape Breton because they offer valuable information, which can fast track knowledge and skills. Participation in these clubs should be a departure point for Cape Breton product teams. Existing clubs include:

- Aboriginal Tourism Product Club
- Acadian Tourism Product Club
- Adventure, Outdoor and Eco-Tourism Product Club
- Atlantic Ecomuseum Network Product Club
- Cross country Ski Product Club
- Cuisine, Wine and Culture Product Club
- Eco-Tourism Product Club
- Gardens Product Club(s)
- Heritage Product Club
- Ski and Snowboard Product Club

- Snowmobile Product Club
- Trans Canada Trail Product Club

A new Product Club – About People?

One of the major resources we have on Cape Breton is our people. Luckily young and old still share the stories that make Cape Breton culture unique. Yet we have an out migration problem and many of our older citizens would like to welcome visitors but have no role to play in the visitor experience. A new product club concept called the "Tourism Corps" would seek to provide education, skills and accreditation to community guides/hosts and interpreters. Young and old would join together, creating activity and in some cases jobs or small enterprise. Municipalities would partner to provide local co-ordination and The CTC, HRDC and others could be seen as funding sources. There is a strong case to be made that in Cape Breton our people are our product – investing in their education and skills should pay dividends.

Figure 12.3: Product Development Initiatives

Product Development Project	Role of PD Manager	Resources Required
Major Infrastructure - priorities identified in Chapter 10	liase with proponent team, monitor implementation Identify incremental business opportunities Encourage new business ventures	Staff time Knowledge of support programs available Investment as per project spec sheets
Programming (Infrastructure) **Cruise welcome / Sailing Cruise Product** **Interpretation Pgm. Cabot Trail / Fleur-de-lis Trail** **Nature Trails Strategy**	Liase with proponent teams Monitor implementation Identify BDP Facilitate communication Liase with marketing function to get product into sales channel	Staff time Communications budget
Packaging **Cape Breton adventure packages** **Seacoast Experience** **Nature Tourism** **Culture tourism** **Aboriginal Experience** **Acadian Experience** **Celtic Experience**	Work with/support product teams BDP Establish Guidelines / admin. Process Liase with communities re training Facilitate partnerships with Nova Scotia Tourism PD Invest in Collateral material Research travel trade opportunities Evaluate customer feedback	Staff time Packaging budget Research budget PD / Marketing Coop Provincial PD resources

Product Development Project	Role of PD Manager	Resources Required
	Deliver packages to sales channel	

Packaging – Cape Breton Adventures

For motorcoach operators

Packaging is an under utilised tool in tourism marketing. Motorcoach companies have been touring Cape Breton for 50 years, and often the itineraries do not change much from year to year. As Cape Breton is part of a Nova Scotia or Maritimes itinerary, it is difficult to achieve additional days within these itineraries, unless significant new product is added.

Often it is local tour operators that offer pre-packaged itineraries to other motorcoach companies. It is important for the sector to maintain close contact with these companies and make minor improvements as product becomes available.

For the Individual Visitor

For the individual visitor, the use of packages purchased through the travel trade increases with the distance travelled. Not surprisingly, European travellers tend to purchase packaged vacations most often. This offers real opportunity for new packaging tailored to the interests of the visitors. With the advent of the Internet and the virtually unlimited amount of destination information that can be made available, visitors often research commercially available itineraries and make modifications for their own use. That is to say that the value of a vacation itinerary to a destination *is much greater* than the number of people who purchase it through travel trade channels.

Supporting Consumers in Itinerary and Package Planning

The Tourism Industry Association of America have recognized this and have made a new program that specializes in "Byways of America" itineraries available on line for individuals or groups to follow as they wish. There is an opportunity for the Cape Breton tourism portal to have a dynamic itinerary function, allowing consumers to craft itineraries that can be used by others. Itineraries created by knowledgeable people, particularly in niches such as seacoast adventures, bicycle tours etc, hiking trails and cultural tours, can be very effective in attracting tourists and helping them experience the best of Cape Breton.

Day Adventures Extend Stay

Day adventure packages are very effective in filling in an itinerary. They must be part of a pre-trip sale or sold as an impromptu, on site travel choice. New Brunswick as has used this tactic effectively to slow tourists en route to Nova Scotia or Prince Edward Island. The intent is to get visitors to stay on the island longer to experience the other areas.

With the establishment of the Cape Breton Welcome Centre at the Causeway, Cape Breton tourism partners have an unparalleled opportunity to sell day adventure packages. This opportunity should be aggressively pursued by every business and every community wanting more tourism traffic.

Product Teams a Good Launch Pad

It is clear that packaging will be an important element of the Cape Breton Tourism Road Map. Product teams can be a good launching pad for tourism packaging. It is recommended that a major initiative be launched to build packages for both the longer haul overnight markets and the day adventure market, following the processes developed in other jurisdictions and making use of Nova Scotia Tourism product development programs and CTC programs.

A “Best of Cape Breton” program could result in many new packages being developed in a very short term, giving opportunity to communities and niche market players to create packages that meet guidelines established in such programs as the Trade Smart initiative offered by Nova Scotia Tourism.

In 2003/04 a selection of test packages on the web portal could be featured in a dynamic regional marketing test using traditional media to draw customers to a major online sale. Off-season product could be positioned with entry-level prices and peak season product sold at premium prices. This concept could be fine tuned for a major multi market marketing campaign in 2004/05, in partnership with Nova Scotia and the CTC.

Community-Based Packages

Partnership staff, working within Nova Scotia product development programs can assist and facilitate participation by communities and businesses throughout the island. They will consult with industry and communities, but the initiatives must come forward from communities to be successful. This plan envisions many informal product groups of like-minded people coming together to develop and package product.

Package Themes

Themes for development might include, among others:

- Wildlife viewing - birding as an example
- Experiencing nature - the Mi'kmaq perspective
- Marine packages
- Winter sports
- Learning
- Nature
- Cuisine
- 2004 celebrations
- Acadian
- Mi' kmaq
- Celtic
- Science and technology
- Industrial history
- Transportation and railway history
- Nautical heritage, harbours and waterfronts
- Palaeontology and fossils
- Sports events.

HUMAN RESOURCES DEVELOPMENT

There are many human resource development initiatives within the Canadian tourism industry, most based on training standards that are well established. The Tourism Human Resource Council has strong program ties to the Tourism Industry Association of Nova Scotia, offering national standards and certification in many aspects of the industry. The Cape Breton tourism partnership and the staff which support their efforts should be very knowledgeable about these programs.

Training and personnel development opportunities should be promoted to industry and communities, with referrals to the appropriate body to implement these programs. In addition to the product teams and groups already noted, the following are some of the industry development initiatives, which will be key elements of overall product improvement and human resource development. Listed as well are several important studies and publications undertaken by Nova Scotia Tourism, which contain recommendations for industry development, product development and marketing.

Leveraging Existing Programs/Resources is Key to Success

The Cape Breton tourism sector does not have the resources to tackle such a large challenge on its own, and must make use of pioneering work which is being done by dedicated, knowledgeable industry players in other parts of the country.

Human Resource Programs Already Available

- SuperHost Program
- Accommodations Grading
- TradeSmart
- Best demonstrated practices from other jurisdictions, other companies, as facilitated by the Nova Scotia Tourism product development program.

Studies Which Reference HR, Standards

- Marine Tourism Study 1997, which notes steps for improving tourism by addressing the barriers to product development, including standards and training.
- Nature Tourism Study 1997, which addresses standards and training issues.
- Culture Tourism Study 1996

Training manuals

Nova Scotia Tourism Handbooks for Bed and Breakfasts, Tour Operators, Adventure Tour Operators, Community Tourism Associations. These are valuable training manuals and product development guides which should be required reading for any industry partner who wants to improve the quality of staff and product. These and other programs will be facilitated by the product development function of the Partnership working with municipalities and other partners.

Yield Management Training

A big part of the challenge to build revenues is the need to increase the prices we charge for existing product. A revenue management approach first perfected in the airline industry, "yield" has successfully been adopted by the hotel sector and other industries. Operators are using yield systems now in Cape Breton businesses but the management technique is not widely used in the tourism sector.

A working group should be assembled by the Tourism Task Force, under the product development program component. It will build an educational and training program that will, in due course, be available to industry. As this type of training is new, we will seek the assistance of content, IT and funding partners to develop a specific Cape Breton approach to this training need.

APPENDICES

A. Industry Consultation and SWOT Analysis

B. Inventory of Accommodation Facilities

C. Inventory of Attractions and Other Tourist Facilities

D. List of Festivals and Events

E. Inventory of Arts and Crafts Facilities

F. List of References

APPENDIX A
Industry Consultation and SWOT Analysis

Baddeck Public Meeting Summary Notes
Monday, June 17, 2002

Consultants Moderating Session

John Murray	Economic Growth Solutions Inc.
John Hockin	Economic Growth Solutions Inc.
Dan White	Dan White & Associates Ltd.

Session Participants

Participant	Organization
Scott MacAulay	Tourism Task Force; Cape Breton Resorts
Don Mingo	Tourism Task Force;
Warden Gordon Sampson	Warden, Victoria County
Henry Fuller	Baddeck Boat Yard and Bras d'Or Lakes Stewardship Society
John Fraser	Tourism Cape Breton
Janet Connor	Tourism Cape Breton
Dr. Hilda Tremblant	Campground operator
Don Moffet	Castle Moffet – Accommodation
Sharon Morrow	Interested Citizen
Lorna MacFarlane	Baddeck Volunteer Fire Department
Tom C. Wilson	Victoria County Recreation Department
Mike Crimp	Wreck Cove General Store
Ian Green	Independent Accommodation Operator
John Cotton	Inverness Recreation Department
Michele MacKenzie	Deputy Minister, NS Dept. Tourism & Culture
Bob Doucette	
Frank MacPhail	
Wayne McClure	
Allen Rowe	
Sam MacPhee	Gaelic College
Vickie Price	
George Maher	Central Cape Breton Community Development
Marina Young	
Nancy MacDonald	
Elaine MacNeil	
Ross MacDonald	

Discussion of Key Issues

Tourism Products

- What tourism products should we be developing?
- Kids attractions on Island – summer and all year
- Develop Bras d'Or Lakes – Aquarium
- Communities develop packages / vouchers / day trips
- Cabot Trail – back to being major icon (Festival)
- Develop Winter Festival
- Recreational Boating
- Heritage Product
- Pathway – Trails around the Island
- Continue Viewscapes
- Cape Breton Highland Games – Tattoo

- Ferry Service PEI to Port Hood
- Promote 3 – 5 days in Cape Breton
- Festivals and Events
- Small Landing Strip
- Few more Golf Courses
- "Branson North" – Performing Culture
- Market "Homecomings"
- National Centre for Curling
- Cooperative partnership with Inverness County
- Important to have standards in accommodation
- Cabot Trail – Inverness – Victoria County
- Challenge is to have people stay one extra night
- Cabot Trail – coastal mapping project
- Local info in rooms at the hotel – history and heritage
- Develop and utilize the Highlands
- Promote Moose Hunt
- Develop what we already have
- Protect and develop the Bras d'Or Lakes
- Cabot Trail – stay overnight in Margaree, Cheticamp and Ingonish
- Growing the shoulder season
- Develop Cultural Assets (Cultural, Performing Arts Centre)
- Theme of Flight
- Louisbourg and Bell
- Winter Season – Ski Cape Smokey open is important to economy and marketing report indicates this
- Trail Development – Trans Canada Trail; every area has their trails – Cape Breton is looped together
- Festivals, Beach Development – done by volunteers –
- Cater better to disabled travellers
- Lake Ainslie is largest freshwater lake in Nova Scotia and an underutilized resource (could develop Lake Ainslie Campground)

Packaging

- What type of packages should we be looking at developing?
- Birding – 3-5 day package together with culture and locals
- Photographer's Tour
- Seaplane Service from Halifax to Cape Breton
- Historical Package – Cultural Packages
- Transportation from place to place around the Bras D'Or Lakes
- High-end cruise around the Bras D'Or Lakes
- Hiking
- Authentic Cape Breton experience – Music, Nature & Pubs
- Piggy-back existing stuff – i.e. Celtic Colours
- More choices and things to do
- Package Newfoundland, Cape Breton Island and PEI as Islands

Marketing / Promotion

- Stronger market/promotion Cape Breton Tourism on a cooperative basis
- Restore a DMO for Cape Breton Island
- Strategic marketing of the Bras d'Or Lakes - major unique feature

- Lower fuel price
- Assess Cape Breton positioning
- Highlight icons – Cabot Trail – Louisbourg
- Working relationships with the trade and province
- Europe – double the value for your money
- Capitalize on Newfoundland Ferry traffic and promote/market to them
- Ecology integrity – marketing in sync with the product
- Vision of Cape Breton Island – together
- Visitor Information Centres – Accept 184,000 – 113,000 in 2001 – take a look at the buildings and hours of operation and training
- Go into the southern market
- Growing shoulder seasons is a key element

Infrastructure Issues

- To increase revenues from $230 to $400 million – we need to get people here in an easy manner. Rubber tire traffic is not enough.
- Enhanced air access into Sydney is critical
- PEI Ferry out of Port Hood
- Enhance communities
- Improve roads
- Maintain existing infrastructure before adding to it
- Lack of standards as to physical plant

Organizational Issues

- Streamlined organizational structure
- CED – Strong Link
- Mobilize and hold volunteer input
- Administrative support at community volunteer level
- Relationship with Provincial Government on a daily basis
- Advocacy
- Labour Challenges

Training/ Human Resources

- Enhanced staff training is essential
- Front line staff face particular needs
- Training at community level
- Training – better local product awareness
- Educating operators to marketing opportunities
- Ecology integrity – impact on ecology
- Environment
- Schools for training
- Concerns over availability of trained manpower to handle the increase in tourism traffic

Implementation Requirements

- How will the Road Map be measured for success
- Capital
- Infrastructure
- Marketing

- Capital Investment
- Incentive to invest
- Entrepreneurs/project proponents
- Communication/links with the communities
- More awareness of the value of Tourism
- Volunteers – more of them
- Network communities around the Cabot Trail
- Timing is key to implementation
- Political will has to be there
- Facilitate industry growth and expand
- Access to capital from non-traditional sources

Other Issues and Concerns Raised

- Cabot Trail –off-season services and common amenities
- Major Performing Centre
- Baddeck Media Festival
- More support for the arts
- Road Map should reflect work done to date at community level on development planning
- Tourism - quality of life connection
- Commissioner of the Cabot Trail and Films for Cape Breton
- Promote snowmobiling
- Collective effort - cooperation
- Doers and Dreamers
- ECBC – working partnership with industry
- Various roles and responsibilities should be clear and understandable
- Industry takes ownership of the Road Map
- Think outside the box
- Better knowledge of tourism industry dynamic
- Facilitate interaction of Tourists with locals
- Pollution in Bras d'Or Lakes – Invest in environmental issues and clean environment for visitors
- Compensation levels need to be addressed
- Must be clear on the threshold for growth
- Industry viability at the forefront?

Key Points

- Infrastructure – roads and attractions
- Cabot Trail – Icon
- Travel patterns – Air Access
- Tourists interact with the local people
- Training
- Ecology integrity
- Bras d'Or Lakes
- Not enough trained labour force for 50% increase in visitors
- Compensation an issue with tourism employees
- Working cooperatively
- DMO – Develop cultural assets
- Visitor Information Centres
- Public amenities

Inverness Public Meeting Summary Notes
Monday, June 17, 2002

Consultants Moderating Session

John Murray	Economic Growth Solutions Inc.
John Hockin	Economic Growth Solutions Inc.

Session Participants

Participant	Organization
Bill O'Brien	Youth Tourism Internship Program (UCCB)
Jasmine Jones	
Alice Freeman	Bear Paw Gift & Craft
Doug Ryan	Concerned Citizen
David Ryan	Citizen
Gordon Cranton	Cranton Cottages
Laurie Cranton	Fox Rock Trail Ride Adventures
Ned MacDonald	Inverness Miners Museum
Jim Ryan	IDA, Golf Committee, Inverness Development Assoc.
Elizabeth MacPhee	Owner, Thatch Inn & Gifts
John MacIsaac	Inverness Development Association
Stewart Applegath	Cape Breton Clay
Ben Fraser	Painter/Potter – Cape Breton Clay
Hugh Wallace	Inverness Lodge
Pauline MacLean	MacDonald House Museum
Allan MacDonald	Nova Scotia Trail Federation
Rodney Charn	Highland Village Museum
Eleanor & Alex Ryan	Gables Motel
Francis Moloney	Port Hood Area Development Society
Geoff Nishi	G.K. Nishi, Architects & CED Associates
Stephen Basker	Chair of Building Committee for Arts Centre Building Past President, Inverness Co. Committee of the Arts

Discussion of Key Issues

General Observations

- Celtic definition? 8 Cultures – Gaelic
- PEI comparison about 1.2 m visitors
- Nova Scotia off-island market
- Market for people who will move here
- Cape Breton not marketed in UK and Europe

Markets

- US strong market
- VFR / Friends /
- Europe / UK small now, but potential for the future
- Access is a critical piece for new markets
- Asia?
- Negative experience re CBGF. Application form for fund is lengthy
- Trail Development related to Fed Dollars is awaiting these results.

- Municipal plan not getting the go ahead
- Opportunities in the maritime market? PEI / Family market
- Environmental issue will affect capacity issues
- Co-ordination of funding resources
- Inverness – perception of difficult market

Product Opportunities

- Cape Breton as big picture
- Packaged by municipal units
- Product and Packaging
- Golf – Jack Nickalus Course is unique
- Attract International visitors
- Visitors / destination
- Engine for tourism
- Ecotourism is world-class
- Trails / Water / underdeveloped and under-marketed
- Beach Access
- Snow trails / winter Margaree – Trans Canada Trail
- Golf & Ecotourism must co-exist
- Other sectors who supports museums etc. are more US/Ontario
- Hiking / Biking
- Culture – dancing etc.
- Sports fishing – neglected in the shoulder – Margaree
- Ecotourism: Outdoor + education
- Nature based tourism – fishing / hunting – anything outside – Higher growth than main market
- Missing children – activities “camps” – sports
- Staying open earlier / later
- Networking along the shore
- National Park triggers seasonality
- Celtic colours ends the season
- Winter – snowmobile business – all year
- 10B Industry – CTC – 34Billion
- Multipurpose trails
- 40% of trails – signage
- West side attractive to snowmobilers

Packages

- Museums – themes
- Golf packages – travel Fab 4
- Biking
- Kayaking / canoeing – Lake Ainslie + rivers & oceans
- Hiking – winter
- Combinations of packages
- Encourage trade / companies to develop the product – Tour Operators
- Bus tours – they would come to Inverness – Roads
- Package Food / Cuisine + people related
- Links tourism to resources
- Cultural product – dancing etc.

- Cultural calendar? – Municipality
- Web – Positioning must be broad sell
- Media relations – Margaree – Macleans
- Need to use the good press – leverage to sell it

Organizational Issues

- Who implements the strategy?
- Volunteer burnout – "intimidated"
- Federal / Provincial / Municipal linkages re: funding and information
- Young people internship programs + others
- Young people have ideas but don't know where to go in the community
- We don't market to youth but should
- Mentorship from adults in tourism fields to young people
- Internet

Implementing the Study

- Who is going to coordinate the implementation?
- RDA, Municipality, Regional Tourism Association, Development Associations
- Industry Leadership – Formula to make it work
- Parochial Cape Breton
- Paranoia
- Can we work together? Yes, if each element works together
- Do we have momentum?
- Need organizational network to be successful

Cheticamp Public Meeting Summary Notes
Tuesday, June 18, 2002
Consultants Moderating Session

John Murray	Economic Growth Solutions Inc.
John Hockin	Economic Growth Solutions Inc.

Session Participants

Participant	Organization
Monique AuCoin	Task Force Member
Roland Chiasson	La Digue Craft Shop
Leandre LeBlanc	Le Moine Development Association
Anne Marie Currie	Le Moine Development Association
Rene AuCoin	College de l' Acadie – Association touristique
Bob Wheeler	Margaree Area Development Association
Francis Gillies	Strait Highlands RDA
Ethel Merry	The Cheticamp Motel & Cheticamp Devel. Comm.
Maurice Doucet	Cabot Trail Sea & Golf Chalets
Raymond Doucet	Co-op Council
Eve Polecke	CBGF
Robert Fraser	ECBC
Alvin Martell	CDENE
Jean Timmons	Tour Operator, Consultant & Freelance Photographer
Aurel Muise	CDENE Development Officer
Blaine Gillis	Strait Highlands Regional Dev. Agency
Rene LeFort	Flora's and Le Gabriel
Paul A. Desveaux	Bellefontaine Bed & Breakfast
Denis H. Larade	Conseil Co-op Acadien Credit Union
Ginette Deveau	Plage St. Pierre Camping Ltee
Sylvia Lelievre	Association Touristique du Cheticamp
Geraldine Bourgeois	Manager Les Cabines du Portage
Lon Dubinsky	Works with Arts Heritage groups in small Commmunities
Marguerite LeBlanc	Interested Community Member
Carole Aucoin	Young Adults Action Committee
Valerie LeBlanc	Lemoine Development Employee
Rosie Grace	Lemoine Development Association & CHNE-TV Researcher
Elaine Wallace	Mgr., Visitor Services & Education, Cape Breton Highlands National Park
	Auberge dejeuner de soleil – Bed & Breakfast
Armand St. Jean	Concerned Citizen, affiliated with World Acadian Congress
Glen Bourgeois	Le Portage Golf Course & Cheticamp Arena
Marguerite Deveau	Editor, The Participaper, Inv. Co. Periodical
Marie Aucoin	La Societe Saint-Pierre (Les Trois Pignons)
Lisette Cormier	Le Conseil des Arts de Cheticamp
Paul Galant	

General Issues

- Is it destination or the marketing of our product?
- Keep our visitors here with our products!
- Shoulder Seasons
- Make Cheticamp – Major Destination – Unique culture – tap into Francophones by improving marketing and presence outside the Province and the country
- New Brunswick invests more dollars into Tourism than the Nova Scotia Government
- What kind of strategies / development to get over our hurdles – the hump?
- Unspoiled – Extraordinary Beauty
- Does our numbers / population decide how much marketing each area gets? Why the competition … why not pool together and work together
- Need resources to partner to promote each other – enrich each other
- A unique experience for your visitors
- We are missing out on the packaging for our visitors and for ourselves
- Best studies – talking to the clients
- Connecting link between attractions
- EDUCATION AT ALL LEVELS!!!

Product Issues

- Le Congres Acadien 2004
- Percentage of Francophones to our region
- History, culture, geneology etc. – Acadian Activities
- Concerned with preservation of our history!
- Signage
- Percentage of our visitors downgrade
- Reason for this study?
- Nature / Culture / Increased Traffic – Improve Training
- Relationship between agencies and the proposed plan – (oil and gas? – Tourism)
- Questionnaire Re: Our communities – need results to make a plan (Accommodations)
- Concerned about the Government's role in Marketing Nova Scotia
- Roads
- Turbines on Cheticamp Island (N.S. Power)
- Keeping our community as it is!
- Need to know each other on Island on Exterior
- Treat our own with respect – develop our culture / history (museums & galleries) and nature without commercialization! We have such uniqueness – let's not lose it
- Sydney Airport is downsizing
- Cape Breton County – Island
- Cultural projects
- Harbour Development – Tourism Attraction to area
- Causeway / Bridge / Roads
- Provincial Marketing
- Training "A Key"
- Have we identified our weaknesses and strengths?

Attractions Development

- Grading of attractions
- Port Hood Ferry from Souris, PEI

- Margaree Air Access
- Inverness Golf Course
- 2 Projects Council of the Arts
- Sound & Light Show – re-enactment of historical events
- Water Puppets – local and Cape Breton
- Market Beaches
- Festival Development (more ECBC Funding?) at least 3 years
- Events early to late May as target date – signature, world class tier
- One major plan for all of Cape Breton

Marketing / Promotion

- Who should promote our area products? Maybe a true Cape Bretoner
- Major trade shows might not be the answer
- Master of our own Destiny!!
- These Dollars – where do we fit in?
- Small scale – Community based education
- All part of this Puzzle
- Why not invest in prolonging our seasons – not overflowing us!
- Low dollar issue
- Volunteer / Stress / Burnout
- Marketing – Fair return? Yes – Why Ontario?
- Quebec closer and more opportunity – a potentially strong Market
- Parks Canada data – indicates 10% from Quebec
- Not enough marketing in Quebec. The tourists come here by accident
- Shoulder Seasons – need more marketing
- Target New Brunswick and PEI
- Not enough family attractions
- Inability to keep tourists longer
- Infrastructure??
- Higher paying, more permanent jobs

Training / Human Resources

- Do we need training at all levels in communities? Restaurants, Food Service, Garages, Info Centre Kiosks
- What preparation do we need to do before the next level?
- Tourism Sector Training – are we better prepared than 20-30 years ago?
- Visitors are more sophisticated – we need to prepare a plan to accommodate their needs!
- Time Frame for hiring students
- Know our own Community, Island, Province, etc.
- Resources are few / seldom e.g. Super Host – Too short and not organized as a real training tour
- Need direction and involvement from key agencies
- Why projects directed towards just _ students? Who decides? Where is the sense if planning long-term?
- Hard to get people to come back even though Cape Breton was the major highlight of their visit! Are we short-changing ourselves?
- Communities are neighbours but not aware of each other – their services, cultures, festivals etc.
- Start at student based classes to educate our people

Northeast Highlands Public Meeting Summary Notes
Tuesday, June 18, 2002

Consultants Moderating Session

John Murray	Economic Growth Solutions Inc.
John Hockin	Economic Growth Solutions Inc.

Session Participants

Participant	**Organization**
Dollena MacKinnon	North Highlands Community Museum
Kathleen MacLeod	North Highlands Community Museum
Kenneth MacKinnon	Cape North Development Ltd.
Ignatius La Rosa	
Tom C. Wilson	Municipality of Victoria County
Linda Murray	North Highlands Nordic
Ross MacDonald	Municipality of Victoria County
Donald Jardine	Ski Cape Smokey
Marcelle Lavoie	Business Owner
Sylvia Fitzgerald	Eagle North Canoe & Kayak
Paula Courtney	Board of Directors – Tourism Cape Breton
Eric Robicheau	Cape Breton Growth Fund
Heather Morrison	North Highlands Community Museum Organization
Kevin Chaisson	North Highlands Museum
Charlie Maclean	Markland Resort & Octagon Arts Centre
David Rasmussen	Interested Citizen
Sharon Fraser	Oshan Whale Cruise
Meril Rasmussen	Bay St. Lawrence Community Centre

Discussion of Key Issues

General Issues

- What is a real tourist?
- Danger of over-development
- Preserve natural environment
- Scenery is the premier attribute
- Thriving fishing industries that have been here for generations
- Government support – how it is applied
- Get younger people involved
- Cooperate – not compete
- Awareness
- People feel comfortable – want to stay longer
- No facilities – bathrooms – gas – information

Markets

- Value of Canadian Dollar to American Dollar – Opportunity Markets
- New England - % from U.S.
- Niche – Educational / Workshops i.e. film / ecotraining / massage / park / environment
- Winter market
- Fall

- Weather not necessarily negative
- Seasonal opportunities
- Need to explore dollars spent by niche markets – need to get more money from them

Cabot Trail

- Roads are poor
- Staffing
- Courses needed
- Who takes charge after strategy is set
- Numbers are unrealistic
- Are we ready environmentally and culturally?
- Code of ethics
- Cost of travelling Trail
- Impact of tourism increase on local industry – i.e. oysters
- Sewage
- Should we not have a toll highway?
- John Cabot Celebration lost
- Park needs to be open
- Natural Resources close parks in shoulder season
- Wilderness destination not summer destination
- Fear factor – need controlled use of environment
- More input into strategy plan later on
- Roads – Paved shoulders, bicycle lane and pull-offs needed
- + vista views would be greater
- One brush cutter for Inverness / Victoria
- Moose is a danger factor

Product / Packaging Ideas

- Seasonality – full in summer
- Packaging
- Cabot Trail takes more than a day – slow them down
- Cycling – Road conditions?? – Pave shoulders – dangerous
- Washroom facilities
- Visitor Information Centre in each community
- Wilderness interpretation – places to stop
- Want more tourists??
- Shoulder season – need signs of off-season – pictures of winter / fall
- Tourists are interested
- May – June / October – May
- Early spring – baby boomer / senior
- Summer – young families with school children
- September – visitors spend more dollars
- How to get them to spend more dollars
- Natural History
- Fall – leaves
- Need to stay open
- Indoor pool
- Drinks

- Skiing / cross country – winter
- Parks have groomed
- Quebec, U.S., Washington D.C., Europe and England
- Packages
- Cross country / snowshoeing
- Back Country
- Existing tour operators that offer packages
- Restaurants
- Modest winter package
- Ski hill
- Sauna / fireplaces – accommodation
- Night life
- Cultural tourism
- Group packages
- Rainy day activities
- E-commerce
- Perception of weather

Winter Activities

- Cross Country Skiing
- Downhill
- Snowshoe
- Dog Sleds
- Snowmobile Tours
- Need promotion of activities / help for facilities

Organizational Challenges

- Tourism Cape Breton is still new and it is a challenge
- ECBC is no longer a DMO
- Statistics – which to use and why?

Marketing

- Need to promote Cape Breton
- Word of Mouth
- Good product / facilities
- Know who our customers are
- Promote culture
- Advertising – non-traditional / film / musicians / third party
- Explore public relations / media relations
- Festivals as shoulder seasons
- Festivals & Events
- Doers and Dreamers – push shoulder
- Most successful across countries
- SUV's – four- wheel trip around trail – great tour in the winter
- Lack of resources for marketing – need help such as a hotel tax
- Meat Cove – People pay on rates - $60.00 per year

Training/Human Resources

- Difficulty in staffing and training
- Minimum wage – then they leave
- World class facility at Keltic – 2 winters in 30 not open
- Training – People here can teach others
- Ski Hill – better infrastructure
- Can we accommodate the numbers wanted??
- Hiking
- Festivals / relay, John Cabot – Increase numbers
- E-business
- Educate – municipalities – value of tourism players
- Training – opportunities in-house – management training
- Housing challenge – apt. for labour – affordable housing
- Wages low in industry and seasonal
- Employment insurance

Implementation Issues

- Partnerships
- Nova Scotia Partnership Council 50-50 – Government / Private
- Equal representation
- Linkages to other sectors
- To be sustainable – needs to grow slowly and be integrated with existing industries
- Insurance programs

Louisbourg Public Meeting Summary Notes
Wednesday, June 19, 2002

Consultants Moderating Session

John Murray	Economic Growth Solutions Inc.
John Hockin	Economic Growth Solutions Inc.

Session Participants

Participant	**Organization**
Clarrie MacKinnon	Louisbourg & Area District Tourism Society
John Othick	Louisbourg Trails Society
Mary K. MacKinnon	Louisbourg & Area District Tourism Society
Sharon Hall	Louisbourg & Area
Harrington Lend	
Harvey Lewis	Louisbourg
Ross MacKeigan	District Councillor
Mary MacMullin	Manager, Louisbourg Motorhome RV Park
George Wheeliker	
Carole Ravanello	Cranberry Cove Inn
Margie Cameron	Interested Citizen
Camilla Peck	
Peter Chiasson	Parks Canada
Jean Bagnell	Louisbourg Lighthouse Heritage Comm.
Rita Price	Midtown Housekeeping Cottages
John & Judy Doyle	Louisbourg & Area Tourism Society
Jon Lawrence	Fortress View Restaurant, Louisbourg Merchants
Mary Price	
Cathy O'Neil	Morning Glory Bed & Breakfast
Linda Burke	Grubstake Restaurant
Sharon Thomas	Grubstake Restaurant
Linda Kennedy	Point of View Suites & RV Park Ltd.
W. G. Gartland	Lighthouse Comm.
Eileen Miles	My Favourite Things
Alister MacDonald	Lighthouse Comm. Ocean Race
Greta Cross	
Richard Hardy	Garden Sanctuary Bed & Breakfast

DISCUSSION OF KEY ISSUES

Product Ideas

- Multi-purpose – expand season – non season – e.g. Harbour Trails
- Local Heritage Days
- Local Day Tours
- Harbour Activities – Races & Tours
- Community Investments
- Create Circle Routes (Loops)
- Wilderness Camp
- Fortress open 12 months of the year
- Develop less travelled routes
- Build on great communities

- Pride in Community
- Ecotourism – e.g. Trails
- Infrastructure – Roads – Fleur de Lis Trail
- Impulsive travellers
- Signage
- Build a Team
- Develop and Promote History
- Develop Festivals
- Golf Course
- Shuttle and Cruises to Fortress
- Floating Night Life
- Enormous Hiking Trail Possibilities
- Shipwrecks possibility as a feature attraction
- Airplane and Ship History
- Marconi Receiving Station here in Louisbourg – Titanic Connection & other last messages
- Musical cultural community participating island wide – more like Celtic Colours
- Scuba Diving Cultural Centre

Marketing/Promotion

- Tourism Information Tapes & Radio
- Review Fortress openings – longer season
- Pricing opportunities – prices charged
- Baby Boomers – longer season – before July or after September
- Island Open For Business
- Make Fleur de Lis Trail into a full Loop – tourists do not want to re-trace
- Quebec and Europe – Value for Dollar
- Improved advertising / marketing ideas & packaging

Implementation Issues

- Tourism industry too fragmented and broken up
- Enhanced collaboration between communities and within communities is needed
- Better Web Site – utilize Internet more effectively
- Start collaboration with members of each town hall session

Key Markets

- New England
- Quebec
- Europe
- Yachting Market
- Diving
- Cruise Ships
- Van Tours
- GOLF!!!

Sydney Public Meeting Session

Wednesday, June 19, 2002

Consultants Moderating Session

John Murray	Economic Growth Solutions Inc.
John Hockin	Economic Growth Solutions Inc.
Dan White	Dan White & Associates Ltd.

Session Participants

Participant	**Organization**
Gordon Sampson	Northside Area Community Planning Group
Edward Bender	
Harvey Webber	Smart Shop Place
Hazel Campbell	Beacon Motel & Bed & Breakfast
Connie Bowers	Paradise Found Bed & Breakfast
Janet Connor	Tourism Cape Breton
Ken Tutty	Gowrie House Country Inn
Cliff Matthews	Sydney Mines
Gary Moore	Delta Sydney
Eleanor Anderson	Icon
Aaron Booth	UCCB
Samantha Hill	UCCB
Carl Getto	New Waterford Economic Renewal
Rev. Karen Ralph	Sydney Mines Renewal Assoc.
Sandra Allen-Simes	Clansman Motel
Carol Beaton	Cape Breton Centre for Crafts & Design
E. Barry Smith	
Sam MacPhee	Gaelic College
Jamie Whitters	Cape Breton County Trails Assoc.
Rick McCready	Coastal Connections Trail Association
Cathy Huntley	Casino Nova Scotia
Lou Leith	PAL
Heather MacDougall	CBC Trails Association
Gerald MacDonald	GreenLink Park Society
Charles MacDonald	CB Farm Market Assn & BCA Investment Co-op
Sharon MacDonald	CB Food Processors Assn.
Auley Carey	Northside Planning Group
Don Blackwood	
Gordon Heading	Best Western Northstar Inn
Ann Pilon	Ann's Victorian Bead & Breakfast
Helen Parpoulas	Whitney Pier Festival of Visual Arts
Posey McKinnon	Four Winds Gallery, W.P. Museum
Charles MacKinnon	Sentry Quality Ltd.
Rob Smith	

DISCUSSION OF KEY ISSUES

Tourism Products

- Culture is a key component of Cape Breton Tourism Product
- Avoid over-Commercialization
- "Signature Projects" – e.g. Cape Breton Tourism Centre (Gateway Centre)
- Fossil Centre – Sydney Mines
- Tourism entrepreneurship training for Youth
- History, Sport Heritage – "Mural Town" Development
- Cultural links b/w new pier – Waterford – Glace Bay
- Creation of trails – green space
- Farmers' Market – more permanent? Covered? Need financing – Agricultural tours?
- Southern part of Cape Breton – trails not developed – a lot of public land here – more trails close to the coastline
- Accentuate the natural beauty of the island ' proposed 66 acre park in Sydney
- We lack a culture of excellence in maintaining parks and green space
- Celtic-related culture / music
- Does not have to be Celtic – Eclectic
- Fiddler / miner steelworker – industrial history – diverse background
- Passing on culture – higher end activity
- World Class cultural feel
- Cultural Product – music – dancing – art – heritage – buildings' architecture – cuisine – clans – theatre – large flea markets – community based
- Military installations
- Colliery drive not in travel guide
- Need more loops that keep them looping
- Car & Trails
- Fort Petrie development
- Seacoast experience – develop harbours
- Souris to Port Hood Ferry
- Outdoor experience recreation – walking, hiking, cycling, industrial Cape Breton, whale-watching
- Rails for Trails
- Integrate Culture & Outdoor Experiences whenever possible
- Visual Arts Festival in Pier – multicultural emphasis – geneology
- Further development of Centre 200 (to host more conferences)
- Harbour Clean-up
- Sea-plane on the harbour
- Boat rides in Sydney Harbour
- Cooperatively owned community-based tourism model – pool resources creating a network – mass-marketing an integrated site
- Music tourism – evening programming – local entertainment

Markets and Marketing/Promotion

- Nature Tourism
- Talk to people who visit here – what do they want (.. to buy)
- Sport Tourism and Conferences
- VFR Market – Very Import (Visiting Friends & Relatives)
- Promote Cape Breton at Ferry Terminals (welcome centres) in Newfoundland

- Crafts and artisans enhance the overall tourism product
- Develop showcases and galleries throughout the Island
- Hostellers are potential market – research shows – they have very good spending spin-off
- Attitude shifts among Cape Bretoners … work co-operatively – i.e. different parts of Cape Breton
- Addressing impediments – i.e. in public policy / politics
- We are "giving it away" – we should really look at more realistic pricing scenarios relative to various market segments
- 60% American, 33% Other Canadians, 7% European (German)
- Michigan and Southern States – come off to cool off
- Fill in Gaps (May / June etc.) – shoulder pockets here and there for winter months
- Target people who don't have seasonal changes (i.e. autumn)
- Buy local products (i.e. produce)
- Spring Choral Festival (i.e. big events)
- Spring hiking – nature – Europeans
- Meetings & Conferences – barrier – not all in one (accommodations, meeting rooms)
- Put in Pedway
- Boomers – 88 Million (1946 – 1964)
- Festivals targeted at these audiences – Elder Hostels (component of festivals)
- Cape Breton talent pool – capacity for more festivals, especially for Signature festival

Cruise Ship Market

- Sustainable benefit? – visitors from southern U.S.A. like to come north in summer to cool-off
- Limited shopping, time stay
- Get them to extend stays overnight
- More Bus transportation
- Need local committee for shore side of cruises
- Sunday shopping

Operational Issues

- Political conversions
- What do we want from them?
- Resources and direction
- Guidance and seed money
- Organization follows product categories
- Marketing Money – Have marketing momentum – e-commerce is huge
- Ship based marketing people (Ferries) – direct ship traffic
- Expand on what is in place now organizationally
- Collaborators and Competitors
- Ten year strategy for reunions
- Good service training needed
- We have transportation issues – nice product but how accessible is it (i.e. to the European Market)?
- Tourism affects everyone on Cape Breton Island
- Infrastructure not adequate

Port Hawkesbury Public Meeting Summary Notes
Thursday, June 20, 2002

Consultants Moderating Session

John Hockin	Economic Growth Solutions Inc.
Dan White	Dan White & Associates Ltd.

Session Participants

Participant	Organization
Leo A. MacDonell	Interpretation Centre & President of Celtic Music
Joyce Rankin	Celtic Music Interpretation Centre
Cheryl Gallant	Chamber of Commerce
Robert J. Picton	Chapel Island First Nation Breakfast
Paula Davis	Port Hawkesbury Rec. Dept.
Sandra MacDonald	Sobey's Port Hawkesbury
Carmel Avery-MacDonald	GCRDA
George Freer	Town of Mulgrave
Larry McLean	Mgr. Maritime Inn, P.N.S.C.C.
Don Mingo	Maritime Inns & Resorts
Yvonne Fox	Port Hastings Historical Society
Blaine Macquarrie	Strait Area Waterford Dev. Society
Bruce MacNeil	N.S.C.C.
Francis Gillies	SHRDA
Beryl MacLord	Gulf of Canso Museum Curator
Allena MacDonald	Media
Jeannette Crewe	ECBC Employee – translation
Ron Aitken	Restaurant & Accommodation
Sandy MacKenzie	MacKenzie House Port Hawkesbury
Catherine Ann Fuller	Province of Nova Scotia, Office of Economic Development

DISCUSSION OF KEY ISSUES

Unique Opportunities
- German/Euro investment (Off season- Eco interest)
- Perception of safety since 9/11
- Descendent/Genealogy interests
- Genealogy center - Clan gathering call

Themes
- Fab 4 of culture/nature like golf
- Roads/infrastructure that will loop people
- Plan must compliment the strengths of all Communites
- Signage
- VIC to be enhanced
- Develop strategy re:
    CB music
    Genealogy
    CB crafts
    CB heritage
    A themed approach - a system

- Cultural festivals (passport driven)
- Big ideas
- Require support for small ideas and projects
- Ideas must look at the age of anticipated participants
- Port Hood Ferry
- 4 bedroom communities in CB
- Baddeck, Cheticamp, Sydney and Port Hawksebury - lets use these 4 as a base for development
- Province - more options for industry to become involved in cultural activities
- Involve industry in the process of looking at this
- There is plenty of business for everyone - so we should unify our approach in a collaborative manner
- Develop a culture that will celebrate the success of the industry
- Cautious of the thought that Govt. will do it as they won't

Types of tourism products
- Museum in Mulgrave re Canso Causeway
- Cape Porcupine as a big bill board ("Hollywood"- Cape Breton)
- Celtic Cultural Center support - Experiential - needs expansion of season
- Aboriginal/first nations cultural experience
  Need commitment from employers
  Need cross cultural understanding and acceptance/support
  Need to properly represent culture
  Need to be open to sharing culture with others
- Upgrade the Canso Causeway - make it more welcoming/clean – Better visitor information
- RV park for Pt Hawesbury area
- Learning vacations
- Human resource - training and support for staff and managers - connect community college with the industry
- Exploit connection between Islands (locally and internationally)
- Need transportation upgrades (roads, ferries, airports)
- Gateway tourism center at Strait (review the Pt Hawksebury/P Hastings plan
- Ceilidhs at the creamery now 3 nights a week
  Need to upgrade/expand facility
  Local marketing support needed
- Maintain Kiosks around island
- Conference destination/conventions
- Sports center

Marketing/promotions
- Concentrate on UK
- Don’t over market - get our house in order first
- Niche markets - outside Atlantic Canada via the internet & local info sharing
- Industry has to supplement marketing dollars
- Use money strategically- advertise your web page
- Theme like " Cape Breton masterpiece'
- Focus our marketing, not a scattered approach
- Communities need to be responsive to tourists
- Fam tours
- Island wide outreach and inter community too
- Detailed info sharing for front line workers locally

- Packages

Organizational issues
- Use appropriate vehicles to get info to the industry - needs to be all inclusive for better communications
- Scattered approach / volunteer issue a problem
- Need to be able to sell the product
- If the groups communicated/networked more it would help
- Island wide marketing body needed - representative of all sectors in tourism and geographic representation

Arichat Public Meeting Summary Notes
Thursday, June 20, 2002

Consultants Moderating Session

John Hockin	Economic Growth Solutions Inc.
Dan White	Dan White & Associates Ltd.

Session Participants

Participant	Organization
Victoria Bonin MacKenzie	Pottery Owner
Greg Silvetz	Tourism Isle Madame Assoc.
Brenda Martell	CBGF Tourism Task Force
Rosemary Burns	Bras d'Or Shores Resort Owner/Manager
Richard Cotton	Municipality of Richmond
Teddy Pointer	Lennox Passage Yacht Club
Clifford Boudreau	Richmond Tourism Culture & Recreation
Dan Wall	Dept. of Tourism, Culture & Recreation
Alvin Martell	CDENE
Lisa Berthier	Congres mondial acadien 2004
Terrance Fortoner	Flatcalm County Inn
Glen MacDonald	Dundee Resort & Golf Club
Mac MacIsaac	Village-on-the-canal Association
Lorenzo Boudreau	
Donna Boudrot	Isle Madame Historical Society
Claire Doyle	Isle Madame Tourism & Trade Assoc.
Janine Lacroix	La Picasse Centre culturel, communautaire et educatif

DISCUSSION OF KEY ISSUES

- Very positive attitude in the group - saw the project as an opportunity to engage more broadly in the industry
- Saw opportunities with both the Acadian cultural product and a chance to connect with neighboring communities.
- Emphasized the importance of implementation to the success of the Road Map.
- Want linkages between Road Map and NS Tourism Partnership plan

Consensus around the themes of:
- Need to work together as communities
- Fab 4 of culture would be good for the Acadian product side
- Saw real benefit in linking up to Cheticamp and its perceived strength in the market
- Felt strongly about connecting the Fleur de Lis Trail
- Agreed with the general notion of looping people
- Condition of roads discussed and the idea of a road rating or qualifier system was introduced.
- Emphasis on asset mapping within the Cape Breton Tourism sector – build more awareness of what Cape Breton has to offer by way of a tourism product.
- Suggested three central themes in tourism marketing – seacoast, heritage and culture and nature.

Types of tourism products
- Cultural touring product

- Branson idea? Tested this on them - very keen on the concept - felt it would serve their community and Cape Breton well. In fact they expanded the Branson concept to a national heritage treasure concept - make it bigger than Cape Breton and attract both federal money and more customers
- Homecomings
- Signature events – high profile, unique, quality – distinctly tied to Cape Breton
- Animated discussion around genealogy and the possibility of a links to genealogy resources such as the Beaton Institute and NS Highland Village-Roots Cape Breton project
- Segment or categorize Cape Breton based on Tourism product similarities

Marketing/promotions
- Internet
- At the causeway
- Very supportive of the causeway visitor center concept
- Keen on Acadian Congress 2004 and the need to develop and market initiatives that will enhance the appeal and draw of the congress such as reunions, and a gathering of the clans
- Specific mention of a Highway Route 104 Port Hawkesbury to Sydney product club as a means of increasing the flow of visitors down the east side of the Island as compared with travel on Route 105 to Baddeck.
- Discussion of 'Fam" Tours. Considered useful in promotion.
- Emphasized marketing Cape Breton as a destination.
- Provide easy access to local music.

Organizational issues
- See themselves as collaborators by nature
- Understand the importance of implementation to the success of the road map but do not currently see a potentially effective delivery model.
- Need liaison/partnership resources internally in the community - need a full time role to seek out the potential partnerships beyond the community (in tourism) - there are so many and they require professional attention beyond the ability of volunteers
- Island wide marketing body needed - representative of all sectors in tourism and geographic representation
- Need to develop some type of model that addressed the persistent problem of a lack of sustainable cultural products

Next steps
- The group was very keen to be involved in some way in the next phase of the project.
- They would like to get a briefing or a sense of what track the road map is taking as it goes forward.

Iona Public Meeting Summary Notes
Friday, June 21, 2002

Consultants Moderating Session

John Hockin	Economic Growth Solutions Inc.
Dan White	Dan White & Associates Ltd.

Session Participants

Participant	Organization
Gerard MacNeil	Iona CAP
Angie Fawler	
Jim MacNeil	
Fred McCracken	Boisdale Volunteer Fire Dept.
Chantal Prosper	
Allison MacKenzie	Feisan Eilein
Elaine MacNeil	Grand Narrows B&B
Allison MacKenzie	Grand Narrows & Waterfront Dev. Soc.
Vince MacLean	CCBC Ventures Inc.
Walter MacNeil	N.S.H.V.
Sheila MacNeil	Highland Heights Inn Ltd., Manager
Dan E. MacNeil	Victoria County
Philip MacLennan	Grand Narrows Board of Trade
Rod Farrell	Canadian Alliance
Rodney Chaisson	Highland Village
Bruce MacNeil	Central Cape Breton Community

DISCUSSION OF KEY ISSUES

- This was an add on meeting, inspired by the request of some members of the community.
- Grand Narrows Board of Trade was the hosting organization
- According to group Iona area not formally included in a study since 1980 Laventhol & Horwath study.

Background Information
- At peak 225k cars recorded at Little Narrows - it has dropped to 85K since the price has been put on the ferry (all local traffic?)
- Group felt they need a bridge at Little Narrows
- Tourism traffic is up at Highland Village although claim is that they get only 4% of the on-island traffic.
- Highland village a good potential anchor for a Gaelic or cultural trail and packages.
- They claim that an informal Gaelic network is in place now-
- Faiche model - 30 community based instructors out there now around the island
- Product club potential in the cultural sector? The 3 cultural groups in one Product club?
- Positive attitude in the group - no one was complaining and all wanted to assure us that they had a vibrant community that was keen on tourism, actively involved and wanted to work with other communities to drive tourism numbers
- There was a sense evident in discussions that Route 223 which runs from through the centre of Cape Breton from Trans Canada 105 east of Whycocomagh to the Trans Canada 105 west of Sydney – total distance approximates 50 km. – was not getting the attention it deserved in existing promotional materials and marketing.
- The need to better strengthen the culture-tourism relationship was foremost on the group's mind.
- Lots of volunteer/community input in shaping/delivering cultural and tourism products along Rte. 223

Types of tourism products
Highland Village

- Real potential felt to be here - They are linked now to the Highland Folk Museum in Scotland.
- Could be developed into an international center for Gaelic.
- They felt they could use the existing center and in concert with international contacts, build the concept - develop genealogy and other learning vacation themes and market specifically in shoulder season.

Celtic Colours

- Discussion about: "what makes it work so well?"
- It involves the linkage of 26 communities - just the challenge everyone identified when they have been talking about wanting to become more collaborative, less competitive.
- Best practices as seen by the group in Celtic colors:
  - Strong committee structure
  - Picking a need time gets people rallied around common goals - all see the need for shoulder business
  - Get culture and tourism to work together by showing them the common goal
  - Eye ball to eyeball contact among communities - help people build relationships and trust
  - Knowing this a 3 year job and it will be tough
  - Outsource the product side (in this case get professional promoters to do the entertainment)
  - Be aggressive about ticket sales (pricing)
  - Target a mix of funding - govt., corporate and sales (all 1/3)

The Bras d'Or Lakes:

- Cruise ship on Bras dor lakes - didn't see the benefit in cruise ship - they were looking for the impact in their own communities "they would spend their money on the boat".
- *BUT* felt a jazz cruise would be very good and would integrate theme of music and the cruising theme
- Sailboat charters - they felt that it would both position CB in the minds of tourists as a sailing haven and generate money from the tourists who chartered boats and the support industries
- Emphasized rich history of the lakes and a cruise that focused on this aspect
- Central Cape Breton Ventures Inc. a local community development corporation has spent considerable time working on a Bras D'Or Lakes Aquarium, Education and Marine Research Centre. Major study completed in the past year. New initiatives planned to advance the concept. The centre would focus on the rich ecological character of the Lakes – 450 square mile inland waterway – (one of the largest in the world). As well, the centre would have an educational, research and obvious tourism bent. It was emphasized that marine research and tourism should make a link - an attraction or research center that provides learning vacation programming?
- Christmas island potential as a destination - Santa's village? Or other way to get people to stop
- Very keen on the story of 200 years of aboriginal and highland harmony in the area. Major mural depicting this has been commissioned and presented recently
- Branson idea? Good responses to the concept
- Want to build on the apparent inertia of the Highland Village which is now part of the Nova Scotia Museum system and attracts 35,000 yearly. Highland Village has completed a new strategic directional document and aspires to be an International Centre of Excellence in Gaelic Culture
- Discussion of a Highland Folk Museum

Marketing/promotions

- The causeway - they saw need for more capture and felt that community would step up to challenge of going down to the causeway to market instead of waiting for a visitor center to market them
- Uniqueness of Route 223 and scenic qualities of the area considered important in marketing

S.W.O.T. Analysis

We have prepared an overall SWOT Analysis for Cape Breton's tourism industry. Strengths, weaknesses, opportunities and threats have been grouped into the following categories:

- ♦ Product
- ♦ Packaging
- ♦ Marketing
- ♦ Organization
- ♦ Infrastructure

The objective of this analysis is to identify key strengths to build upon in the strategies developed for the Tourism Road Map, weaknesses that must be addressed, the range of opportunities to consider, and some threats which must also be taken into account.

Strengths

Cape Breton's tourism industry has many strengths to build on, shown as follows:

+ STRENGTHS
Product ♦ Cape Breton Island is ranked as the 3rd best temperate island in world by the 2001 Condé Nast Traveler reader's choice awards. ♦ Unspoiled natural beauty, extensive seacoast ♦ A great diversity of landscapes with tourism potential ♦ Cape Bretoners are renown for their friendly service and excellent food ♦ The Cabot Trail is an internationally recognized icon ♦ Fortress Louisbourg is the second largest historical restoration in North America ♦ Highland Links is the #1 ranked golf course in Canada and 57th in the World ♦ Alexander Graham Bell National Historic Site ♦ Celtic Colours International Festival ♦ Le Congres Acadien 2004 ♦ An extensive range of heritage products and festivals ♦ Unique and interesting history (e.g. Acadian, Gaelic, Mi'kmaq) ♦ The Island's artisans and crafts enhance the overall tourism product ♦ Highland Village is now linked to the Highland Folk Museum in Scotland ♦ World-class ecotourism resources ♦ Strong Aboriginal product development initiatives underway (Eskasoni, Membertou) ♦ Whale watching on the Gulf of St. Lawrence ♦ Recreational boating and cruising on Bras d'Or Lakes ♦ Salmon Fishing on the Margaree River

+ STRENGTHS

- Excellent sea kayaking along the coast, on Bras d'Or Lakes and to offshore islands

Packaging

- The "Fabulous Four" golf package(s)
- Variety of packages offered by Island's major resorts
- Cycling Tours of the Island, especially the Cabot Trail
- Circular touring routes throughout the Island

Marketing

- Strong U.S. market, particularly from New England states and Florida
- Substantial VFR market, particularly within province and from other Maritime provinces
- Value of Canadian Dollar relative to the American Dollar

Organization

- Growth Fund and Tourism Task Force leading growth initiative on behalf of industry
- Municipalities active in tourism and economic development planning
- First Nations Councils and economic development stakeholders showing strong interest and initiative regarding tourism

Infrastructure

- Canso Causeway provides excellent access to mainland
- Ferry links to Newfoundland enable inter-provincial itineraries
- Sydney Airport offers scheduled and charter air access

Weaknesses

There are also a range of weaknesses that must be addressed:

- WEAKNESSES

Product

- Majority of international visitors to Cape Breton stay less than 3 nights
- Lack of four/five-star accommodation in certain areas (e.g. St. Peter's, New Waterford and parts of the Cabot Trail)
- Operating season for many accommodation facilities ends in mid October, while tour operators are still busy
- Limited availability of accommodation in Baddeck during summer
- Many of the trails and waterways are underdeveloped and under-marketed

- WEAKNESSES

- Lack of products and events for the spring and winter seasons
- Lack of market ready Mi'kmaq tourism products
- Not enough family attractions
- Limited retail shopping hours in some communities
- Loss of the John Cabot Celebration
- Lack of infrastructure at ski hills
- Short length of operating season for key attractions (e.g. Fortress of Louisbourg and Cape Breton Highlands National Park)
- Lack of support for the arts
- Natural Resources Department close parks in shoulder season, but still demand for them

Packaging

- Lack of availability of packages combining adventure and culture
- Lack of packaging between communities and counties

Marketing

- General lack of awareness of Cape Breton as a destination in the international marketplace
- Currently no full-fledged Destination Management Organization (DMO) for Cape Breton Island
- Lack of marketing in UK and Europe
- Currently not marketing to youth or Generation Xer's
- Lack of marketing activity in Quebec
- Lack of marketing in the shoulder seasons – especially spring
- Lack of resources for marketing (e.g. hotel tax)
- Need to utilize the Internet more effectively
- Minimal marketing of sportfishing in the shoulder season around Margaree
- Existing perception of the weather

Organization

- Super Host program too short and not organized as a real training tour
- Lack of communication between communities about each other's services, cultures, festivals etc.
- Need to educate some municipalities about the value of tourism
- Low industry wages and large seasonal workforce
- Lack of a strong Island-wide marketing body representative of all sectors and geographic locations
- Municipal plan not getting the go ahead in Inverness

Infrastructure

- Air access for longer haul flights is through Halifax and often requires an overnight stop, limiting time available for Cape Breton tours
- Lack of standards relating to tourism's physical plant
- Lack of off-season services and common amenities on the Cabot Trail

- WEAKNESSES
♦ Lack of facilities (e.g. washrooms, gas, information) in Northeast Highlands ♦ Condition of roads on Cabot Trail is poor ♦ Lack of adequate paved shoulder on roads for bicycling ♦ Only very limited number of pull-offs for resting and viewing scenery ♦ Does not appear to be a "culture of excellence" in maintaining parks and green space ♦ VIC's require upgrading and enhancing ♦ Maintain existing infrastructure before adding to it

Opportunities

There are many potential tourism development, packaging and marketing opportunities to consider, as shown below and discussed in more detail in chapters 8 and 10 of this report.

↑ OPPORTUNITIES
Product ♦ Create a Cape Breton Tourism Centre (e.g. Gateway Centre near Canso Causeway) ♦ Build and expand on the Le Congres Acadien 2004 programs ♦ Develop a Lake Ainslie campground, possibly near Trout Brook Provincial Park ♦ Develop a Bras D'Or Lakes Aquarium, Education and Marine Research Centre ♦ Further development of Mi'kmaq cultural and ecotourism products including proposed Longhouse development by Eskasoni First Nation ♦ Membertou First Nation Waterfront Museum and Convention Centre development ♦ Day-trip outdoor adventure packages (ex Sydney) for the U.S. baby-boomer and UK cruise market ♦ Create a winter music festival (e.g. Christmas carols) ♦ Create a winter festival around Nordic activities with races, instructional clinics and other activities ♦ Enhance golf product, possibly locating new courses in Inverness/Port Hood region and Cape Breton County ♦ Salmon fishing information kiosk in Margaree River for tours, guides and other services ♦ Develop a National Centre for Curling ♦ Development of First Nations cultural and ecotourism products within their communities ♦ Enhance heritage interpretation at Battery Provincial Park ♦ Potential heritage attraction in the Mabou Highlands (e.g. historic Scottish settlement) ♦ Potential heritage interpretation site at Indian Point near Port Hood ♦ Create a cultural asset such as a major Performing Arts Centre

↑ OPPORTUNITIES

- Focus on enhancing services for disabled travellers
- Create a high-end cruise around the Bras D'Or Lakes
- Fossil Museum development for Sydney Mines area
- Major expansion of Miners' Museum in Glace Bay
- Develop SUV/4x4 touring trips around the Cabot trail in the winter
- Cultural product delivery at National sites in partnership with Parks Canada
- Enhance activities on Louisbourg Harbour (e.g. races & tours)
- Develop product clusters along some of Cape Breton's less travelled routes (e.g. 255, 223)
- Shipwrecks in Louisbourg harbour could form the basis of an attraction product or tour
- The concept of local heritage days in Louisbourg and other communities
- Enhance the Farmers' Market (e.g. more permanent, covered)
- In conjunction with the Farmer's Market create and market agricultural tours
- Develop a boat tour product for Sydney Harbour
- Enhance the network of showcases and galleries throughout the Island to display artisans' work
- Potential for an RV park development in the Port Hawkesbury area
- Develop an interpretive cruise that focuses on the rich history of the Bras d'Or Lakes
- Develop the Highland Village into an international centre for Gaelic culture
- Create a Jazz cruise on Bras d'Or Lakes to integrate the themes of music and cruising
- Develop additional kids attractions
- Create a Wilderness Camp
- Golf – proposed Jack Nicklaus Course is a unique opportunity – Inverness area
- Sound & Light Show – re-enactment of historical events
- Promote the Moose Hunt more actively
- Spring Choral Festival (i.e. big events)

Packaging

- Create a "Fabulous Four" for other attractions like culture/heritage and outdoor adventure activities
- Promote Cape Breton as a 3 to 5 day stay with itineraries to match
- Create more themed package experiences (e.g. the theme of Flight, anchored by the Bell Museum)
- Work with Parks Canada to package their products with accommodations, other attractions, tours and excursions
- Offer 3 to 5 day birding packages that also combine local culture
- Promote a Photographer's Tour of the Island
- Build on and around existing events like the Celtic Colours
- Work with Newfoundland and PEI to package trips to the "Islands"
- Create a food & cuisine package/tour that links eating with heritage
- Promote winter packages including downhill skiing, cross country skiing, telemarking,

↑ OPPORTUNITIES

snowshoeing and dog sledding

- Create snowmobiling and accommodation packages on touring routes
- Integrate culture and outdoor experiences wherever possible
- Develop product clubs along specific highway routes to highlight attractions and activities (e.g. Hwy. 104 Port Hawkesbury to Sydney).
- Highland village is an excellent anchor for a Gaelic or cultural trail development.

Marketing

- Enhanced web sites, major Web portal and Internet-based marketing and promotional activities
- Promote the performing arts of Cape Breton (e.g. "Branson North")
- Potential to market "Homecomings", especially in connection with Le Congres Acadien 2004
- Focus on growing the shoulder and winter seasons
- Better integration of destination marketing and promotional efforts with those of Parks Canada
- Continue to highlight the Island's icon attractions (e.g. Cabot Trail, Fortress Louisbourg, Celtic Colours)
- Market directly to Newfoundland ferry traffic
- Great potential to promote snowmobiling trails and packages in Cape Breton to the U.S. market
- Marketing to the European and United Kingdom visitor, great future potential
- Marketing the unique Francophone culture and increasing the presence outside the Province and the country (e.g. Quebec, France)
- Develop marketing initiatives around Cape Breton's beaches
- Significant potential to draw more visitors from Quebec because of location and Acadian cultural products
- Develop sport tourism and conferences marketing initiatives
- Backpacker and hostelling market(s) offer opportunities for budget accommodation providers and adventure operators
- More cooperative marketing initiatives with sectors grouping together to increase their marketing reach
- Strategic marketing of the Bras d'Or Lakes as a unique feature with heritage and cruising potential
- Develop unique niche products – educational / workshops (e.g. film / eco-training / spa / park / environment)
- Opportunities in the Maritimes market (e.g. promote to family market)

Organization

- Develop community based packages and product clusters
- Cooperative partnerships between Counties and communities
- Provide accommodation facilities with information packages on the area's history and

↑ OPPORTUNITIES

heritage

- Access to capital from non-traditional sources
- Develop mentorship programs for experienced operators to assist younger people entering the industry
- Establish a tourist operator "Code of ethics" to ensure maintenance of minimum standards
- Certify communities as sustainable (e.g. *Green Globe* communities)
- Need to develop better public-private sector working partnerships for the tourism industry

Infrastructure

- Develop nature themed touring routes for wildlife viewing (e.g. like Great Texas Coastal Birding Trail)
- Create more wilderness interpretation sites, where visitors can stop
- Development of state-of-the-art Web portal for Cape Breton's tourism industry
- Work with Parks Canada to address infrastructure issues which relate to their Cape Breton operations
- Continue to develop the Trans Canada Trail throughout the Island
- Consider possibility of seaplane service from Halifax to Cape Breton
- Transportation system around the Bras D'Or Lakes
- Enhanced air access into Sydney is critical
- Work towards improving the condition of the roads
- Establish a community-based visitor information centre in each community
- Promote Cape Breton at Newfoundland ferry terminals (e.g. welcome centres)
- Continue to develop and maintain the Island's trails networks – significant potential in the southern part of Cape Breton and focus on coastal trails
- Upgrade the Canso Causeway to make it more welcoming
- Develop multi-component Gateway tourism centre at Causeway
- Consider viability of a bridge at Little Narrows over St. Patrick's Channel

Threats

Specific threats must also be examined and addressed by strategies.

➔ THREATS

Product

- Danger of over-development, need to maintain character and lifestyle of Island (e.g. uniqueness)
- Parks Canada sites trigger the tourist season for Cape Breton
- Celtic Colours Festival currently ends the tourism season
- Preservation of Cape Breton's history
- Large range and diversity of products being developed in other Atlantic Provinces
- Maintaining the consistency and quality standard of product, particularly in the accommodations sector
- Maintenance of beach access
- Maintaining a green image in the marketplace

Packaging

- Competition from other destinations in North American and overseas

Marketing

- Maintaining Cape Breton's profile in the marketplace, with a sustained marketing presence
- Significant increases in marketing expenditures by some competitive destinations
- For example, PEI substantially increased its marketing budget in 2002

Organization

- Lack of awareness of the value of tourism to communities
- Maintaining administrative support at the community volunteer level
- Dealing with volunteer burnout and stress
- Training at community level
- Concerns over availability of trained manpower to handle the increase in tourism traffic
- Short term nature of festival development funding from ECBC, events need at least 3 years
- Lack of professional full-time people needed to develop partnerships beyond the community, which are outside the ability of volunteers
- Lack of a strong island-wide destination marketing body, which is representative of all sectors in tourism and has widespread geographic representation
- Many of the cultural products and ideas generated are not financially sustainable.

Infrastructure

- Pollution in Bras d'Or Lakes and seeking investment to preserve the integrity of the ecosystem
- Trail development is often dependant on federal or provincial dollars
- Lack of clear and appropriate signage in certain areas and sites

➔ **THREATS**
♦ Nova Scotia Power turbines on Chéticamp Island
♦ Sydney Airport has limited resources to attract new business and flight schedules (recent pull-out of Provincial Airlines)
♦ Canadian motorcoach regulations which restrict pickups out of province – this limits back-to-back tour planning in some cases
♦ Environmental issues will affect capacity and development opportunities

APPENDIX B
Inventory of Accommodation Facilities

Bras d'Or Lakes Accommodations

Name	Location	Units	Restaurant	Gift Shop/ Store	Rentals	Pool	Activities	Meeting Room
Hotels, Motels and Motor Hotels								
Aberdeen Motel	Whycocomagh	14		X			X	X
Bras d'Or Lakes Inn	St. Peter's	20	X					X
Bras d'Or Shore Resort	West Bay	8				X		
Captain rene's House	St. Peter's	6					X	
Fair Isle Motel	Whycocomagh	21						
Highland Heights Inn	Iona	32	X					
Joyce's Motel & Cottages	St. Peter's	12				X	X	
Kelly's View Motel	Bras d'Or	14						
Macdonald Hotel & Dining	St. Peter's	7	X					
MacNeil's Motel	Bras d'Or	17						
Mountain Brook Motel	River Denys	4						
Seal Island Mote l	Bras d'Or	46	X			X		
Resorts and Lodges								
Bras d'Or Lakes Outfitters	Barrachois Harbour	3			X		X	
Dundee Resort	West Bay	97	X	X	X	X	X	X
Bed & Breakfasts and Tourist Homes								
Bras d'Or Lakes Hideaway B&B	Grand Narrows	2						
Bubbles Bay B&B	Boularderie	3						
Fiddler's Farm B&B	River Denys	3						
Gilead B&B	Boularderie East	2						
Grand Narrows B&B	Grand Narrows	4						
Hayes B&B	Orangedale	2						
Hector's arm B&B	Iona	4						
J. Kerr's B&B	Englishtown	2						
Lakeview B&B	Boisdale	2						
MacIntyre's B&B	Big Pond	3						
Mary Smith B&B	Whycocomagh	2						
Moeller's Lake View B&B	Orangedale	2						
Turn of Century B&B	West Bay	2						
Mary Smith B&B	Whycocomagh	2						
Moeller's Lake View B&B	Orangedale	2						
Turn of Century B&B	West Bay	2						
Cabins, Cottages & Country Inns								
Annfield Manor Country Inn (c 1893)	Little Bras d'Or	4						
Annlynn Lake Resort	Boulardurie	3			X		X	
Big Pond Housekeeping Cottages	Big Pond	6						
Carter's Lakeside Cottages	St. Peter's	2						
Celtic Mist Country Inn	Whycocomagh	5	X					
Diana Inn & Cottages	West Bay	8	X		X		X	
Kayak Cape Breton Cottages	West Bay	3			X		X	
MacKinnon's Cabins	River Denys	3						
Mountain Vista Seaside Cottages	Big Bras d'Or	4		X			X	

Bras d'Or Lakes Accommodations

Name	Location	Units	Restaurant	Gift Shop/ Store	Rentals	Pool	Activities	Meeting Room
Sporting Mountain Cottages	West Bay	3			X		X	
Swiss Valley Chalet	Valley Mills	2						
Campgrounds and RV Parks								
Arm of Gold Campground	Bras d'Or	140					X	
Battery Provincial Park	St. Peter's	53					X	
Ben Eoin Beach	Ben Eoin	207		X			X	
Glenview Campground	Whycocomagh	100		X				
Joyce's Campground	St. Peter's	35				X	X	
Mountain Vista by the Sea Campground	Big Bras d'Or	12		X			X	
Seal Island Trailer Park	Seal Island	155		X			X	
Whycocomagh Provincial Park	Whycocomagh	61					X	

Cabot Trail Accommodations

Name	*Location*	*Units*	*Restaurant*	**Gift Shop/ Store**	**Rentals**	**Pool**	**Activities**	**Meeting Room**
Hotels, Motels and Motor Hotels								
Acadian Motel	Chéticamp	16						
Albert's Motel	Chéticamp	4						
Auberge Gisele Inn	Baddeck	78	X	X	X		X	
Baddeck Inn	Baddeck	5						
Buckles Cabins & Motel	Margaree Forks	15						
Burton's sunset oasis Housekeeping Motel	Dingwall	5						
Cabot trail Motel	Baddeck	40	X	X		X		
Ceilidh Country Lodge	Baddeck	52	X	X	X			
Chéticamp Motel	Chéticamp	9						
Coyote Moon Guest House	Margaree Centre	3						
Duck Cove Inn	Margaree Harbour	24	X					
Fraser's Motel & Cottage	Chéticamp	5						
Highland hideaway Motel	Pleasant Bay	8						
Laurence Guest House (c 1870)	Chéticamp	4						
Laurie's Motor Inn	Chéticamp	54	X		X		X	
Macdonald's Motel & Cabins	Dingwall	17						
MacIvor House	Baddeck	1						
Margaree Lodge	Margaree Forks	40	X		X	X	X	
Merry's Motel	Chéticamp	10						
Mountain View Motel	Pleasant Bay	25	X					
Park View Motel	Chéticamp	17	X		X		X	
Ross' Housekeeping Motel	Margaree Valley	4						
Salty mariner's Motel & Inn	Chéticamp	20						
Scotch Hill Apartments	Baddeck	2						
Sea breeze Cottages & Motel	Ingonish	15						
Shoreline suite	Ingonish	1						
South harbour hideaway summer home	Dingwall	1						
St. Ann's Motel	Baddeck	8						
The Village Manse Vacation House	Baddeck	1						
Trailsman Motel	Baddeck	55	X			X		
Resorts and Lodges								
Atlantic Beach Resort	Ingonish	32	X		X	X	X	
Big Intervale Fishing Lodge	Margaree Valley	6	X		X		X	
Chéticamp Outfitters Inn	Chéticamp	6					X	
Glenghorm Beach Resort	Ingonish	81	X	X	X	X	X	X
Green Highlander Lodge	Baddeck	3					X	
Inverary Inn Resort	Baddeck	138	X	X	X	X	X	X
Keltic Lodge	Ingonish Beach	84	X				X	X
Markland Coastal Resort	Dingwall	25	X		X		X	X
Meat Cove Lodge	Meat Cove	2					X	
Silver Dart Lodge	Baddeck	84	X	X	X	X	X	

Name	*Location*	*Units*	*Restaurant*	**Gift Shop/ Store**	**Rentals**	**Pool**	**Activities**	**Meeting Room**
Country Inns								
Broad Water Inn & Cottages	Baddeck	12						
Castle Rock Inn	Ingonish Beach	15	X					
Chanterelle Country Inn (the)	North River Bridge	9	X				X	
Duffus House Inn (1830)	Baddeck	7						
Four Mile Beach Inn (1880)	Cape North	5					X	
Island Inn limited (the)	Ingonish Beach	10						
L'auberge Doucet Inn	Chéticamp	11	X					
Lynwood Country Inn	Baddeck	4	X					
Normaway Inn & Cottages	Margaree Valley	28	X		X		X	
Piper's Guest House	Indian Brook	5	X	X		X		
Telegraph House	Indian Brook	43	X					
Bed & Breakfasts and Tourist Homes								
An Seanne Mhanse B&B	Baddeck	4						
Auld Manse B&B	Baddeck Forks	4						
Bain's Heritage House B&B	Baddeck	3						
Bald Eagle House	Baddeck	3						
Bear Cove B&B	North Ingonish	2						
Brewer's B&B	Ingonish Centre	2						
Carol's B&B	Bay St. Lawrence	4						
Castle Moffett	Baddeck	7	X				X	
Bed & Breakfasts and Tourist Homes (continued)								
Chimney corner B&B & Cottages	Margaree Harbour	4						
Conti's B&B	St. Joseph du Moine	3						
Country Haven B&B	Dingwall	2						
Down on the Farm B&B	Baddeck	3						
Eagle's Bay B&B	Baddeck	3						
Germaine's B&B	Chéticamp	3						
Goodwill House B&B	Wreck Cove	4						
Harbour View Inn	Margaree Harbour	3						
Harrison hill B&B	Margaree Forks	4						
Heidi's B&B	Baddeck	3						
Highlands by the sea	Bay St. Lawrence	2						
Inlet B&B	Dingwall Harbour	3						
Kerr's B&B & Cottage	Baddeck	3						
L'anse aux homards B&B	Chéticamp	2						
Luckenbooth B&B	St. Anns'	3						
M & V B&B	Baddeck	3						
Macaulay's B&B	Baddeck	3						
MacNeil House	Baddeck	6	X	X	X		X	
Margaree Inn B&B	Margaree Harbour	4						
McDaniel B&B	Margaree Forks	2					X	
Mother Gaelic's B&B	Baddeck	4						
Oakwood Manor	Cape North	3					X	
Ocean Haven B&B	Margaree Harbour	2						
Old Miller Trout Farm B&B	Margaree Forks	2			X		X	

NAME	*Location*	*Units*	*Restau-rant*	**Gift Shop/ Store**	**Rentals**	**Pool**	**Activities**	**Meeting Room**
Bed & Breakfasts and Tourist Homes (continued)								
Pilot whale B&B	St. Joseph du Moine	3						
Restawyle tourist home B&B	Baddeck	5						
Roost B&B (the)	Baddeck	3						
Salmon pool Inn	Margaree	4						
Sarah Jean's Inn	Baddeck	6						
South Harbour B&B	Dingwall	2						
Stephen's B&B	Baddeck	3						
Taigh Mairi B&B	Baddeck	2						
Taigh na h-aibhne B&B	Baddeck	2						
Taylor's B&B	Margaree Harbour	3						
The Dunlop Inn	Baddeck	5						
Tree seat B&B	Baddeck	4						
Two Little B&B	White Point	3						
Water's Edge Studio	Baddeck	1						
Worn Doorstep (the)	Baddeck	4						
Cabins and Cottages								
Auberge dejeuner de soleil Inn	Chéticamp	5						
Back Cove Cottage	Neil's Harbour	1						
Beach View Cottage	Dingwall	3						
Bethune's boathouse Cottage	Baddeck	1						
Breezy brae summer Cabin	Baddeck	1						
Brown's Bruaich na H' aibhne Inn & Cottages	Margaree Centre	8	X					
Cabot trail sea & golf Chalets	Chéticamp	12						
Cajun cedar log Cottages	Margaree Forks	6						
Cape Breton Highlands bungalows	Ingonish Beach	25						
Chéticamp Island Resort	Dominion	5						
Chiassons 's Riverview Housekeeping Cabins	Margaree Harbour	3						
Cranton Cottages	Margaree Centre	6						
Deervale Cottages	Ingonish Beach	10					X	
Hunter's Mountain Country Cottages	Baddeck	12						
Ingonish Chalets	Ingonish Beach	12		X	X		X	X
Kennedy's Housekeeping Cottages	Baddeck	2						
Knotty Pine Cottages & tourist home	Ingonish Ferry	10						
Lakes Cottages	N.E. Margaree	6	X	X	X		X	
Les Cabins du Portage (Chéticamp sporting camps)	Chéticamp	9						
McIntyre's Housekeeping Cottages	Baddeck Inlet	2						
Mountain View Cottage	Baddeck	1						
Ocean View Motels & Chalets	Chéticamp	18						
Pilot Whale Chalets	St. Joseph du Moine	8						
Point Cottages by the sea	Ingonish	6						

NAME	*Location*	*Units*	*Restau-rant*	**Gift Shop/ Store**	**Rentals**	**Pool**	**Activities**	**Meeting Room**
River Trail Cottages	Margaree Centre	6						
Rocky Bay Cottages	North Ingonish	4						
Seashell Housekeeping units	Chéticamp	3						
Silver Spruce Vacation Park	Baddeck	3			X	X	X	
Skyline Cabins	Ingonish Beach	12						
Sleepy Hollow Cottages	Ingonish	8						
The Bungalow	Bucklaw	1						
Thompson's Cabin	Baddeck	1						
Whale Cove summer village	Margaree Harbour	30		X	X		X	X
Wreck Cove wilderness Cabins	Wreck Cove	2					X	
Campgrounds and RV Parks								
Baddeck Cabot Trail Campground	Baddeck	158		X	X		X	
Bras d'Or Lakes Campground	Baddeck	85		X	X	X	X	X
Buckles Trailer Court & Campsite	Margaree Forks	20						
Dino's Camping & Trailer Park	Ingonish	15		X				
Englishtown Ridge Campground	Englishtown	49				X	X	
Hideaway Campground	Dingwall	39			X		X	
Jumping Moose Campground	St. Margaret's Village	10					X	
Lakes Campsite	N.E. Margaree	37	X	X	X		X	
Meat Cove Campground	Meat Cove	25					X	
Parks Canada Big Intervale Campground	Ingonish Beach	10						
Parks Canada Broad Cover Campground	Ingonish	256					X	
Parks Canada Chéticamp Campground	Chéticamp	162					X	
Parks Canada Corney Brook Campground	Ingonish Beach	20						
Parks Canada Ingonish Beach campground	Ingonish Beach	90						
Parks Canada MacIntosh Brook Campground	Ingonish Beach	10						
Parks Canada Marrach Group Campground	Ingonish Beach	3						
Pine Away Overnight Trailers	Baddeck	3						
Piper's Trailer Court	Indian Brook	49	X	X		X		
Plage Saint Pierre Campground	Chéticamp	87					X	
Silver spruce vacation park	Baddeck	85			X	X	X	
St. Ann's Bay Campark	Englishtown	34		X			X	

Ceilidh Trail Accommodations

Name	Location	Units	Restaurant	Gift Shop/ Store	Rentals	Pool	Activities	Meeting Room
Hotels, Motels and Motor Hotels								
Capeway Motel	Port Hastings	7						
Gables Motel	Inverness	10						
Hebridean Motel	Port Hood	16						
Howard Johnson Inn - Highland gateway - Port Hastings	Port Hastings	70	X					
Inverness Lodge Hotel & Motel	Inverness	25	X					
MacPuffin Motel	Port Hastings	44	X			X		
SkyeLodge Cape Breton Island	Port Hastings	49	X					
Country Inns								
Duncreigan Country Inn	Mabou	8	X					
Glenora Inn & Distillery	Glenville	6	X				X	
Haus Treuburg Country Inn & Cottages	Port Hood	6	X					
Hillcrest Hall Country Inn	Port Hood	11	X					
Tulloch Inn	West Lake Ainslie	6	X					
Bed & Breakfasts and Tourist Homes								
Apple Tree Farm B&B	Glendale	2					X	
Beaton's B&B	Mabou	3						
Clayton Farm B&B	Mabou	4						
Creignish B&B	Creignish	3						
Cup o' tea B&B	Inverness	1						
Elmsdale Farm B&B	Mabou	3						
Flowers on the front porch B&B	Whycocomagh	3						
Foot Cape B&B	Inverness	3						
MacLeod Inn	Inverness	6						
Marg's B&B	Troy	3						
Rachel by the Sea B&B	Judique North	3						
Cabins and Cottages								
Ceilidh Cottages	Port Hood	10				X	X	
Chisholm's of troy coastal Cottages	Troy	7						
Colindale Cottages	Port Hood	2						
Inverness Beach village	Inverness	41	X	X			X	
Lighthouse Cottages	Port Hood	9						
MacLeod Highlander Farm Cottage	Port Hood	1						
Paul Bunyan's Oceanfront Cottages	Troy	6						
Sunset Housekeeping Cottages	East Lake Ainslie	3					X	
West Lake Ainslie Cottages	West Lake Ainslie	7			X		X	

Ceilidh Trail Accommodations

Campgrounds and RV Parks								
Ainslie Village Tent and Trailer Park	South Lake Ainslie	65		X				
Ceilidh Trailer (RV) Camping Park	Mabou	15	X			X	X	X
Inverness Beach village	Inverness	37	X	X			X	
MacKInnon's Campground	East Lake Ainslie	25		X				
MacLeod's Beach Campsite	Dunvegan	126					X	
Other								
Mabou River Guest House and Hostel	Mabou	15	X		X		X	

Fleur-de-lis & Marconi Trail Accommodations

Name	Location	Units	Restaurant	Gift Shop/ Store	Rentals	Pool	Activities	Meeting Room
Hotels, Motels and Motor Hotels								
Carmel Centre	New Waterford	14		X				X
Cove Motel	Auld's Cove	42	X	X	X		X	
Duke of York Cranberry Farm Tourist House	Arichat	1			X		X	
Fortress Inn Louisbourg	Louisburg	45	X	X				
HarbourView B&B & Motel	Port Hawkesbury	9						
Louisbourg Heritage House	Louisbourg	5						
Maritime Inn Port Hawkesbury	Port Hawkesbury	73	X				X	X
Point of View Suites	Louisbourg	13	X					
Port Hawkesbury Motel	Port Hawkes bury	28	X					
Vina Motel	Arichat	5						
Will-bridg House	Glace Bay	4						
Resorts and Lodges								
Flat Calm Country Inn	D'Escousse	5	X	X	X		X	X
River Inhabitants Inn	Cleveland	5			X		X	
Country Inns								
Cranberry Cove Inn	Louisbourg	7						
L'auberge Acadienne Inn	Arichat	17	X					
Bed & Breakfasts and Tourist Homes								
Becky's B&B	Reserve Mines	3						
Camilla Peck's B&B	Catalone	3						
Coal Captain B&B	Louisbourg	2						
D'Escousse B&B	D'Escousse	4						
Garden Sanctuary B&B	Louisbourg	3						
Grandma's House B&B	River Bourgeois	3						
Greta cross B&B	Louisbourg	3						
Innkeepers cafe B&B (the)	Glace Bay	2						
La Marguerite B&B	Port Hawkesbury	3						
Lady Louisbourg B&B	Louisbourg	3						
Bed & Breakfasts and Tourist Homes (continued)								
Levy's B&B	Louisbourg	2						
Louisbourg Harbour Inn	Louisbourg	8						
Louisbourg Manse B&B	Louisbourg	3						
MacKenzie House B&B	Port Hawkesbury	4					X	
MacLeod's B&B	Catalone	3						
Spinning Wheel B&B	Louisbourg	3						
Stacey House B&B	Louisbourg	4						
Sunlit Valley B&B	Albert Bridge	4						
Cabins and Cottages								
Hilltop Cottage	Louisbourg	1						
Indian Point Lodge	Grand River	3						
Lupine Cottages	Louisbourg	1						

Fleur-de-lis and Marconi Trail Accommodations

Name	Location	Units	Restaurant	Gift Shop/ Store	Rentals	Pool	Activities	Meeting Room
Midtown Housekeeping Cottages	Louisbourg	10						
Mira River Cottages	Marion Bridge	4	X					
Montebello Cottage	Louisbourg	1						
Peck's Housekeeping Cottages	Louisbourg	7						
Robin's Harbour View Cottages	Arichat	2						
Salmon View H ousekeeping log Cabins	Grand River	5						
St. Esprit Lake Wilderness Holiday	Grand River	2			X		X	
Troy Lodge Cottages	Port Hawkesbury	9						
Victoria Bridge Housekeeping Cottages	Marion Bridge	5						
Vollmer's Island paradise	West Arichat	7	X		X		X	X
Campgrounds and RV Parks								
Hidden Treasure Campground	Louisbourg	74		X		X	X	
Louisbourg Motorhome RV Park	Louisbourg	57						
MacKeigan's Bay Beach Park	Marion Bridge	50		X			X	
Mira River Provincial Park	Albert Bridge	141		X			X	
Point of View RV Park	Louisbourg	36	X					

Metro Cape Breton Accommodations

Name	Location	Units	Restaurant	Gift Shop/ Store	Rentals	Pool	Activities	Meeting Room
Hotels, Motels and Motor Hotels								
Beacon Motel & Lodge	Sydney	13				X	X	
Best Western North Star Inn	North Sydney	101	X					X
Cambridge suites Hotel - Sydney	Sydney	149	X				X	X
Cape Bretoner Motor Inn	Sydney	71						
Chambers Guest House	North Sydney	4						
Clansman Motel	North Sydney	46	X			X	X	
Comfort Inn - Sydney	Sydney	62						
Cormorant tourist home	Sydney	4						
Days Inn Sydney	Sydney	165					X	X
Delta Sydney	Sydney	152	X			X	X	X
Highland Motel	North Sydney	18						
Jacques-Cartier Motel	Sydney	20						
Meadows Motel	Sydney Forks	10						
Meridian Hotel	Sydney	65	X					
Paul's Hotel	Sydney	17						
Royal Hotel	Sydney	10						
Country Inns								
Gowrie House Country Inn	Sydney Mines	10	X					
Bed & Breakfasts and Tourist Homes								
Alexandra Shebib's B&B	North Sydney	4						
Ann's Victorian B&B	Sydney	3						
B&B on Blacketts Lake	Sydney	2						
Candle Light B&B	Sydney River	2						
Century Manor B&B	Sydney	2						
Christies' B&B	Sydney Forks	3						
Company House B&B	North Sydney	3						
Court House bed and breakfast (the)	North Sydney	3						
Dove House B&B	North Sydney	3						
Garland Stubbert's B&B	Sydney Mines	3						
Gathering House B&B (the)	Sydney	3						
Heritage home B&B	North Sydney	5						
Linden Tree B&B	Sydney	3						
Paradise Found B&B	Sydney	3						
Park Place B&B	Sydney	3						
Purcell Place B&B	Sydney	2						
Cabins and Cottages								
Garden Court Cabins	Sydney Forks	11			X		X	
Campgrounds and RV Parks								
Driftwood Tent & Trailer park	North Sydney	75		X			X	
Other								
University College of Cape Breton	Sydney	50					X	X

APPENDIX C

Inventory of Attractions and Other Tourist Facilities

Heritage Attractions – Bras d'Or Lakes

Name	Location	Product Group	Product Description
Johnstown Market	Johnstown	Arts & Crafts	Market in converted school house
MacIssac Kiltmakers	St. Peter's	Arts & Crafts	Traditional Scottish kiltmakers
Rita's Tea Room	Big Pond	Arts & Crafts	Tea room and gift shop of Cape Breton's famous singer Rita MacNeil.
Whycocomagh & District Historical Society	Whycocomagh	Cultural Society	Society working towards establishment of the museum
Coal-fired Generating Station	Point Aconi	Historic Site	Historic coal-fired Generating Station
Orangedale Intercolonial Railway Station	Orangedale	Historic Site	Built in 1886 by the Intercolonial Railway of Canada later operated by Canadian National and Via Rail
St Peters Canal	St. Peters	Historic Site	800 metre canal linking the Atlantic Ocean with Bras d'Or Lake. Completed in 1869.
Highland Village Museum	Iona	Museum	43 acre living museum devoted to early Scottish settlers. Historic buildings and costumed guides
Marble Mountain Museum and Library	Marble Mountain	Museum	Presents story of the limestone and marble quarry in late 1800s
Nicholas Deny's Museum	St. Peters	Museum	Collection of local historical materials housed in a 1967 building, inspired by French styles.
Orangedale Railway Station Museum	Orangedale	Museum	Displays, old pictures, documents, and artifacts from local area.
Roots Cape Breton Genealogy & Family History Centre	Iona	Museum	Part of the Highland Village.
Wagmatcook Culture & Heritage Centre	Wagmatcook	Museum	Cultural centre including museum exhibits, Mi'kmaq crafts, and many activities and events.
Wallace MacAskill Museum	St. Peters	Museum	Historic Building (c 1880) with over 100 of MacAskill's photographs and other items.

Heritage Attractions – Cabot Trail

Name	Location	Product Group	Product Description
Acadie Masque	St. Joseph du Moine	Arts & Crafts	Mask making Studio
Hooked Rug Interpretation Gallery	Chéticamp	Arts & Crafts	World famous Dr Elizabeth LeFort
Joe's Scarecow Village	Cap Le Moine	Arts & Crafts	Over 100 scarecrows in various dress and poses
Octagon Arts Centre	Dingwall	Arts & Crafts	
Schooner Village	Margaree	Arts & Crafts	Craft shop and tearoom
Cabot's Landing	Cape North	Historic Site	John Cabot's landfall in 1497 and beginning of British Empire overseas
Église Saint-Pierre	Chéticamp	Historic Site	Built in 1893 as the centre of worship for the Roman Catholic Community of Cheticamp

Name	Location	Product Group	Product Description
Informative Plaque	St. Ann's	Historic Site	Reverend Norman McLeod immigrated from Scotland to Pictou in 1817
Informative Plaque	St. Ann's	Historic Site	Sainte-Anne, settled 1629 by captain Charles Daniel, and site of an early Jesuit mission.
Informative Plaque	Sugar Loaf	Historic Site	First Terminus of the Atlantic Cable 1856
Informative Plaque	Sugar Loaf	Historic Site	John Cabot's discovery of North America on 24th June 1497
Informative Plaque	Sugar Loaf	Historic Site	Maisie MacPherson -Munro founder of the Cape Breton Historical Society
L'Eglise St. Pierre Church	Chéticamp	Historic Site	1893 heritage church
Lone Sheiling	Pleasant Bay	Historic Site	Replica of Scottish shepherd's hut
MacLeod Pioneer Cemetery	St. Ann's	Historic Site	Early pioneer cemetery
Ross House Studio	Margaree Harbour	Historic Site	Working print making studio in historical buildings withfine art gallery
Cabot Archives	Neil's Harbour	Historic/Culture	A repositary of local historical documents
Bras d'Or Lakes & Watershed Interpretive Centre	Baddeck	Interpretive Centre	Interactive modules presenting ecology of the Lakes and audio/visual presentation
Margaree Fish Hatchery & Interpretation Centre	Margaree Valley	Interpretive Centre	View fish fry at various stages in their evolutionary cycle, interpretative displays
Whale Interpretive Centre	Pleasant Bay	Interpretive Centre	Inspires, promotes and preserves an awareness of whales and marine life in Cape Breton.
Acadian Museum	Cheticamp	Museum	Displays of Acadian relics from area and displays of wool carding, spinning, weaving and rug hooking.
Alexander Graham Bell	Baddeck	Museum	National Historic Site
Centre de Genealogie Pere Charles Aucoin	Cheticamp	Museum	Major family collections: Acadian families of the Cheticamp area
Gaelic College of Celtic Arts & Crafts	St. Ann's	Museum	Presents Scottish history from past to present day. Extensive gift shop, musical demonstrations and the Great Hall of the Clans
Giant MacAskill Museum	Englishtown	Museum	Artifacts belonging to Angus MacAskill (7ft 9in. Tall) circa 1800s.
La Pirogue Fisheries Museum	Chéticamp	Museum	Celebrates the area's
Les Trois Pignons	Chéticamp	Museum	A cultural and information centre.
Margaree Bicentennial Museum	East Margaree	Museum	
Margaree Salmon Museum	North East Margaree	Museum	Numerous displays, old-time fishrods & tackle, fly-tying material, pictures and poachers' paraphernalia.
Marion Elizabeth Schooner Museum	Margaree Harbour	Museum	
North Highlands Community Museum	Dingwall	Museum	

Heritage Attractions – Ceilidh Trail

Name	Location	Product Group	Product Description
Inverness County Centre for the Arts	Inverness	Arts & Crafts	Art Gallery
Informative Plaque	Inverness	Historic Site	Province of Nova Scotia historic site in memory of the miners who lost their lives in Inverness coal field 1901-1915
Informative Plaque	Judique	Historic Site	First pioneer settler Michael MacDonald. Commemorated the 200th Anniversary of his arrival
Informative Plaque	Port Hood	Historic Site	Hon. Sidney Smith born Port Hood Island 1897, died 1959.
Informative Plaque	Port Hood	Historic Site	Donald MacMillan and his wife Sarah first settlers on the property in 1802.
Informative Plaque	Port Hood	Historic Site	The settlement of the land in 1802 of Angus and Ann Gillis.
Informative Plaque	Port Hood	Historic Site	Moran Family arrival in 1815 from Ireland
Informative Plaque	Port Hood	Historic Site	St.Peter's convent 1884-1984 sisters of de notre dame
Informative Plaque	Port Hood	Historic Site	Alfred Reynolds the founding member of the Chestico Museum 1903-1979
Informative Plaque	Port Hood	Historic Site	Donald Macpherson parish priest from 1919 to 1957
Informative Plaque	Port Hood	Historic Site	Second Railway Station in Port Hood 1927
Informative Plaque	Port Hood Island	Historic Site	Arrival of first settler David Smith and his family to Port Hood Island in 1786
Mother of Sorrows Pioneer Shrine	Mabou	Historic Site	Shrine in miniature pioneer church
Pioneer Cemetery	West Mabou	Historic Site	Original Scottish Pioneers
Cape Breton's Celtic Music Interpretative Centre	Judique	Interpretive Centre	History of Music and live performances
Glenora Distillery	Glenville	Interpretive Centre	Only single malt distillery in North America
Au Drochaid (The Bridge)	Mabou	Museum	Centre of artifacts and historical records
Chestico Museum & Historical Society	Port Hood	Museum	Museum of early settlers of area
Father John Angus Rankin Cultural Centre	Glendale	Museum	Local archives back to 1800s
Gut of Canso Museum & Archives	Port Hastings	Museum	A 100-year-old house overlooking the Canso Strait, with displays on causeway
Inverness Miners Museum	Inverness	Museum	In old CN Railway station - displays on coal mining history
MacDonald House Museum	Lake Ainslie	Museum	150 year old gothic farmhouse & barn with displays

Heritage Attractions – Fleur-de-lis & Marconi Trail

Name	Location	Product Group	Product Description
Isle Quilt Market	Port Hawkesbury	Arts & Crafts	
Lighthouse Battery Provincial Park	St. Peter's	Historic Site	1869 Entrance to St.Peter's Canal
Louisbourg Lighthouse	Louisbourg	Historic Site	Stands adjacent to ruins of Canada's oldest lighthouse (1734)
Louisbourg Playhouse	Louisbourg	Historic Site	Live theatre in 17th century style building
Pioneer Cemetery	Framboise	Historic Site	Early pioneer cemetery
Centre LaPicasse	Petit-de-Grat	Interpretive Centre	Acadian cultural and community Centre, visitor info
Two Rivers Wildlife Park	Marion Bridge	Interpretive Centre	Trout fishing
Atlantic Statiquarium Marine Museum	Louisbourg	Museum	
Fortress of Louisbourg	Louisbourg	Museum	National Historic Site
Le Noir Forge Museum	Arichat	Museum	18th century blacksmith museum
MacAskill House Museum	St. Peter's	Museum	A gallery of Wallace MacAskill prints displayed in home of his b irth
Point Tupper Heritage Association Museum	Point Tupper	Museum	Museum is in 1893 Methodist/United church
Sydney & Louisburg Railway Museum	Louisbourg	Museum	Photographs and artifacts telling the story of the S&L Railway
New Waterford and District Historical Society	New Waterford	Cultural Society	
Bridgeport-Dominion Heritage Building	Dominion	Historic Site	
Informative Plaque	Baleine	Historic Site	First Scottish Settlement 1629
Informative Plaque	Baleine	Historic Site	Beryl Markham 1902-1986 monoplane Flight to Baleine Cove in 1935 from England
Informative Plaque	Mira Gut	Historic Site	The Scottish pioneers of Mira.
Marconi Centennial	Glace Bay	Historic Site	
Old French Mine Site	Port Morien	Historic Site	First coal mine in North America
Savoy Theatre	Glace Bay	Historic Site	Restored Victorian Theatre, events year round
Sydney Atlantic Bulwark	Fort Petrie Site	Historic Site	Network of military defences that protected Sydney
Dominion Heritage Schoolhouse Museum	Dominion	Museum	Replica of late 1800s schoolhouse. Various displays of clothing, tools
Fisherman's Museum	Main-á-dieu	Museum	Dedicated to the history and on going livelihood of the community.
Fort Petrie Museum	New Victoria	Museum	Ruins of WWII coastal fortifications, tours

Inventory of Attractions and Other Tourist Facilities

Name	Location	Product Group	Product Description
Glace Bay Heritage Museum	Glace Bay	Museum	
Glace Bay Miners Museum & Ocean Deeps Colliery	Quarry Point	Museum	Many exhibits and guided tour of Ocean Deeps Colliery and simulated mine ride.
Marconi National Historic Site	Glace Bay	Museum	In 1902, the first official wireless message was sent from this site across the Atlantic Ocean to England.
Tompkins Historical Museum	Reserve Mines	Museum	Dedicated to Father Jimmy Tompkins

Heritage Attractions – Cape Breton Metro

Name	Location	Product Group	Product Description
Cape Breton Centre for Craft & Design	Sydney	Arts & Crafts	Summer exhibits, classes
University College of Cape Breton Art Gallery	Sydney	Arts & Crafts	Only public art gallery on Cape Breton Island. Contemporary Canadian works
North Sydney Historical Society	North Sydney	Cultural Society	
Informative Plaque	Sydney	Historic Site	Arrival of Scots to Cape Breton 1802.
Informative Plaque	Sydney	Historic Site	50th anniversary VE Day
Informative Plaque	Sydney	Historic Site	J.F.W. Desbarres 1722-1824
Informative Plaque	Sydney	Historic Site	Sydney's 200 Bicentennial
Informative Plaque	Sydney	Historic Site	Memorial Labour Park
Informative Plaque	Sydney	Historic Site	Sir John George Bourinot - a native of Sydney, Bourinot joined the parliamentary staff in Ottawa in 1868.
Informative Plaque	Sydney	Historic Site	Terry Maclennan Memorial Plaza; Ann Terry Maclennan a community broadcaster and resident of Cape Breton
Informative Plaque	Sydney	Historic Site	Atlantic Convoys
Informative Plaque	Sydney	Historic Site	Korean War 1950- 1953 memorial
St. George's Church & Cemetery	Sydney	Historic Site	Late 1700s with ruins from Louisbourg
Statue	Sydney	Historic Site	Statue from Royal Bank building 1901 to 1976.
Statue	Sydney	Historic Site	J.F.W. Desbarres 1722-1824, founded of Sydney 1785
Beaton Institute of Cape Breton Studies	Sydney	Museum	Numerous manuscripts and historical documents
Cape Breton Centre for Heritage and Science	Sydney	Museum	
Cossit House	Old Sydney	Museum	Historic House (1787) with displays on Cossit
Jost House Museum	Old Sydney	Museum	One of the oldest remaining wooden buildings in Colonial Sydney
St. Patrick's Church Museum	Sydney	Museum	Oldest Roman Catholic Church on Cape Breton Island. Now a museum of local memorabilia.
Sydney Mines Community Heritage Museum	Sydney Mines	Museum	Museum complex including a new fossil centre
Whitney Pier Historical Museum	Sydney	Museum	Holds a vast array of photographs and artifacts pertaining to Whitney Pier.
Bras d'Or VIA Rail train	Sydney	Tour/Excursion	Scenic day train journey from Halifax to Sydney

Other Cape Breton Attractions

Name	Location	Product Group	Product Description
Station Hill Amusements	Louisbourg	Amusements	Go-karts and mini golf
Casinos Nova Scotia	Sydney	Amusements	Casino machines, entertainment lounges
Centre 200	Sydney	Amusements	Sporting arena complex
Gallop's Funland	North Sydney	Amusements	Family entertainment: mini-golf, go-karts, driving range, bumper boats, water slides, baseball machines and canteen.

Outdoor Adventure – Bras d'Or Lakes

Name	Location	Product Group	Product Description
Cape Breton Lake Charters	Big Pond	Boat Charters	Bareboat sailing charter, stay-&-Sail B&B, learn to sail
Grand Narrows Boat Charters	Grand Narrows	Boat Charters	Fully crewed charters on 12m vessel. Packaged with accommodation
Bras d'Or Arctic Char Co-op	St. Peter's	Fish Farm	Salmon and Arctic Char fish farm
Bras d'Or Lakes Outfitters	Barrachois	Fly Fishing	Fishing (Fly, deep sea) and hunting Oufitter
Jolley Country Adventures	West Bay	Guided Adventure	Guided canoeing, fishing, hiking, mushrooming
Kayak Cape Breton	West Bay	Guided Adventure	Guided sea kayaking on Bras d'Or & ocean. Rentals kayak, bike.
Snowdrift Farm	Beaver Cove	Guided Adventure	1/2 to full day hikes with llamas
Easy Dive Canada	St. George's Channel	Scuba Diving	Dive sales, rentals, instruction
Ski Ben Eoin	Ben Eoin	Winter	Downhill Skiing - 1 Quad, rowtow, poma 149m vertical, night skiing

Outdoor Adventure – Cabot Trail

Name	Location	Product Group	Product Description
Elsie Yacht Charters	Baddeck	Boat Charters	Captained Charters on 18m yacht built for AG Bell
Eagle North Canoe & Kayak Ltd	Dingwall	Canoe Outfitters	Canoe & Kayak rentals, shop, cabin
Margaree River Canoe Outfitters	Margaree Harbour	Canoe Outfitters	Canoe rentals hourly and daily
The Lakes Cottages & Campgrounds	Northeast Margaree	Canoe Outfitters	Rent canoes, kayaks, pedal boats
Cap Rouge Ltée Deep Sea Fishing Charters	Chéticamp	Deep Sea Fishing	Deep sea fishing
Fisherman's Reserve	Englishtown	Fish Farm	Lobster pound and mussel farm
Lobster Pound	Belle Cote Beach	Fish Farm	Lobster pound
Big Intervale Fishing Lodge	Margaree Valley	Fly Fishing	Local guided fly fishing

Inventory of Attractions and Other Tourist Facilities

Name	Location	Product Group	Product Description
Chéticamp Outfitters Inn	Chéticamp	Fly Fishing	Oufitters for fishing Margaree & Chéticamp Rivers
Green Highlander Lodge	Baddeck	Fly Fishing	Fully guided fly fishing and instruction
Margaree Lodge	Margaree Forks	Fly Fishing	Guided and rentals for fishing, wilderness tours, hunting
Old Miller Trout Farm	Margaree Forks	Fly Fishing	Stocked trout pond, equipment rentals
Parkview Motel	Chéticamp	Fly Fishing	Salmon fly fishing with local guide
Cape Breton Seacoast Adventures	Ingonish	Guided Adventure	Guided sea kayak tours
Fox Rock Trail Ride Adventures	Margaree Valley	Guided Adventure	Guided trail rides and lessons
Gaboteux Tours	Chéticamp	Guided Adventure	Guided minibus tours of Cabot and nature tours with naturalist. Moose viewing-Fall
High on Island Life Adventure	Baddeck	Guided Adventure	Outdoor tours, 1/2 day to week, guided or self guided. Hike, bike, sail, paddle, fish and culture
Island Eco-adventures	Baddeck	Guided Adventure	Guided & self guided biking and kayaking
Little Pond Stables	Chéticamp	Guided Adventure	Guided trail, beach and mountain rides
North River Kayak Tours	North River	Guided Adventure	Guided hourly to multi-day kayak trips, hiking and rentals
Scotia Sea Kayaking Tours	Chéticamp	Guided Adventure	Guided 1/2 day and longer kayak trips. Rentals
Sea Spray Cycle and Outdoor Adventure Centre	Dingwall	Guided Adventure	Guided biking, kayaking, hiking, x-c skiing, snowshoeing. Rentals
Strathlorne Service Centre	Inverness	Guided Adventure	Guided kayak tours and rentals
Walking the Wildside Adventure Tours	Baddeck	Guided Adventure	Guided interpretive nature trips. 1/2, day or custom
Wilderness Cape Breton	Pleasant Bay	Guided Adventure	Guided 1/2 and multi-day kayak trips
Margaree Harbour Boat Tours	Margaree Harbour	Marine Wildlife	Trip to Margaree Islands, marine life viewing, deep-sea fishing
Puffin Boat Tours	Englishtown	Marine Wildlife	Narrated 2.5 hour trip to Bird Islands
Englishtown Ferry	Englishtown	Public Ferry	Public service cable ferry
Paul Island Trading Company	Dingwall	Scuba Diving	PADI Dive Centre. Rentals, training, charters. Snorkelling rentals and guided tours
Acadian Whale Cruise	Chéticamp	Whale Watching	Whale watching tours, hydrophone equipped
Atlantic Whale Watch	Ingonish Beach	Whale Watching	Whale watching tours
Capt. Mark's Whale & Seal Cruise	Pleasant Bay	Whale Watching	Whale watching tours, hydrophone equipped
Captain Cox's Whale Watch Cape Breton	Capstick	Whale Watching	Whale watching tours, hydrophone equipped
Fiddlin' Whale Tours	Pleasant Bay	Whale Watching	Whale watching tours with commentary
Oshan Whale Cruise	Cape North	Whale Watching	Whale Watching cruise
Sail to the Whales Inc.	Dingwall	Whale Watching	Whale watching on classic 16m schooner
Sea Visions, Whale Watch	Ingonish Ferry	Whale Watching	Whale watching on classic 18m schooner
Seaquarium Whale Watching Tours	North Ingonish	Whale Watching	Whale watching tours 3 daily
Seaside Whale and Nature Cruises	Chéticamp	Whale Watching	Whale watching tours, hydrophone equipped
Wesley's Whale Watch	Pleasant Bay	Whale Watching	Whale watching tours 10 departures daily
Whale Cruisers	Chéticamp	Whale Watching	Whale watching, geology, sea caves
White Point Whale & Scenic Tour	White Point	Whale Watching	Whale watching, sport fishing
Cabot Snowmobile Club		Winter	Trails 60km and 500km, trail camps
Highland Snowmobile Club	Chéticamp	Winter	
Margaree Highlanders Snowmobile Club	Margaree	Winter	
North Highland Nordic Ski Trail	Cape North	Winter	Nordic skiing - over 17km of (un) groomed trails. Rentals, instruction

Name	Location	Product Group	Product Description
Ski Cape Smokey	Ingonish Beach	Winter	Downhill Skiing - 2 Lifts, 303m vertical, snowmaking and ski school
Ski-Tuonela/Telemark Ski Resort	St. Ann's	Winter	Telemark and Nordic Skiing - 15km groomed woodland trails, hiking, biking and x-c skiing

Outdoor Adventure – Ceilidh Trail

Name	Location	Product Group	Product Description
Airmac Flight Centre	Port Hastings	Flightseeing	Charter flights, Flightseeing, rentals
Cove Motel Sightseeing Tours	Port Hastings	Marine Wildlife	Daily nature sightseeing tours Strait of Canso
Port Hood Island View Tours	Port Hood	Whale Watching	Boat tours to islands, hiking, deep -sea fishing, wildlife viewing
Alpine Snowmobile Club	Port Hood	Winter	60km of trails, clubhouse, maps
Inverness Capers Snowmobile Club	Inverness	Winter	

Outdoor Adventure – Fleur-de-lis & Marconi Trails

Name	Location	Product Group	Product Description
Canoe Camp Salmon River	Marion Bridge	Canoe Outfitters	Rentals & sales for canoe and camping gear. Canoe, bike and hiking tours
Starfish Kayak Adventures	St. Peter's	Canoe Outfitters	"sit-on-top" kayaks for rent
Mountain Star Resort	River Bourgeois	Fly Fishing	Stocked trout pond fishing and trail rides
Cape Perce Nature Tours	Louisbourg	Guided Adventure	Nature viewing - birds, flowers and marine mammals
Island Safari Sea Kayaking	Catalone	Guided Adventure	Guided 1/2 to multi-day custom tours on coast
Isle Madame Water & Sky Paddling Adventures	Arichat	Guided Adventure	Guided kayak, fly fishing and hiking. Kayak sales and rentals
Paradise Kayak Tours	Louisbourg	Guided Adventure	Guided 1/2 and multi-day kayak or hiking trips
Paul Island Trading Company	Louisbourg	Scuba Diving	PADI Dive Centre. Rentals, training, charters. Guided wreck diving. Mulit-day to Scatarie & Guyon Islands
Vollmer's Island Paradise	West Arichat	Scuba Diving	Diving equipment rentals, sales and lessons
Cape Clear Snowmobile Club	Cleveland	Winter	320km of trails, trail camps, clubhouse
Eastern Trailblazers Snowmobile Club	Glace Bay	Winter	500km of trails, trail camps
Fortress Louisbourg National Historic Park	Louisbourg	Winter	Nordic Skiing - 9 km groomed and 20km ungroomed trails
Kennington Cove Trails	Louisbourg	Winter	Nordic Skiing - 5.5km of groomed trails

Outdoor Adventure – Metro Cape Breton

Name	Location	Product Group	Product Description
Cape Breton Fly Fishing Adventures	North Sydney	Fly Fishing	Flyfishing with licenced local guide
Bird Island Boat Tours	Big Bras d'Or	Marine Wildlife	Boat tours to Bird Island puffin, eagles and seals
Scuba Cape Breton	Sydney	Scuba Diving	Dive sales, rentals, instruction
Scuba Tech	Sydney	Scuba Diving	Diving equipment rentals, sales and lessons

Parks and Natural Features – Bras d'Or Lakes

Name	Location	Product Description
Barachois	Barachois Harbour	Provincial Park - Picnic area and lagoon
Ben Eoin	Ben Eoin	Provincial Park - Picnic area and lookout to East Bay
Bras d'Or	Bras d'Or	Provincial Park - Boat launch
Bras d'Or Lakes	Bras d'Or Lakes	Cape Breton's inland sea and boating mecca
Dalem Lake	Bras d'Or	Provincial Park - Beach, trail, non-motorized boats, picnic area
Dundee	Dundee	Provincial Park - Boat launch and sandy beach
Groves Point	Bras d'Or	Provincial Park - Warm water beach, picnic area
Irish Cove	Irish Cove	Provincial Park - Picnic area
MacCormack	Iona	Provincial Park - Beach access, views, picnic area
Ross Ferry	Ross Ferry	Provincial Park - Boat launch
Whycocomagh	Whycocomagh	Provincial Park - 61 Camp sites, Picnic area and trails

Parks and Natural Features – Cabot Trail

Name	Location	Product Description
Mary Ann Falls	Ingonish	Provincial Park - Spectacular Waterfall
Cabot Landing	Cape North	Provincial Park - Beach, interpretation, picnic area,
Cape Breton Highlands National Park	Chéticamp & Ingonish Beach	551-Camp sites, interpretation, boardwalk, swimming, hiking, fishing, beaches, picnic area
Cape Smokey	Ingonish Ferry	Provincial Park - Picnic area, trails
Lake O'Law	Finlayson	Provincial Park - Boating, swimming in lake, picnic area
North River	North River Bridge	Provincial Park - Picnic area and fishing
Plaster	North Shore	Provincial Park - Picnic area small trail
St. Ann's	St. Ann's	Provincial Park - Picnic area
Uisge Bahn Falls	Baddeck Forks	Provincial Park - Trails, waterfall, picnic area

Parks and Natural Features – Ceilidh Trail

Name	Location	Product Description
Long Point	Long Point	Provincial Park - Picnic area
Mabou	Mabou	Provincial Park - Picnic area
MacFarlane Woods	Mabou	50-ha Nature Reserve - hardwood forest
Port Hood Station	Port Hood	Provincial Park - Picnic and boardwalk
Southwest Margaree	Margaree	Roadside picnic area
Trout Brook	Lake Ainslie	Provincial Park - Beach access and Picnic area

Parks and Natural Features – Fleur-de-lis & Marconi Trails

Name	Location	Product Description
Grand River Falls Fish Ladder	Grand River	Fish ladders
Battery	Grand Greve	Provincial Park – 53-Camp sites, picnic area, small beach, trail interpretation
Burnt Island	West Arichat	Provincial Park – Boat launch
Lennox Passage	D'Escousse	Provincial Park – Lighthouse, beach, picnic area
Louisdale	Louisdale	Provincial Park – Boat launch
Point Michaud Beach	Point Michaud	Provincial Park – 3km Sandy beach
Pondville Beach	Arichat	Provincial Park – Large beach, lagoon, picnic area
Dominion Beach	Dominion	Provincial Park – Sandy beach, boardwalk, trails
Mira River	Mira	Provincial Park – 141 Camp sites, picnic area and swimming

Parks and Natural Features – Metro Cape Breton

Name	Location	Product Description
Petersfield	Wesmount	Interpretation, historic ruins, picnic area

Golf Courses – Cape Breton

Name	Location	Trail	Product
Dundee Resort & Golf Club	Dundee	Bras d'Or	18-Hole Championship Golf Course. 72-Par (5,940 yd.). This course was designed by Robert Moote and is one of the "Fabulous Foursome"
Baddeck Forks Golf Club	Baddeck	Cabot	9-Hole, par 70 (5,590 yd.) course
Bell Bay Golf Club	Baddeck	Cabot	18-Hole, Par 72 (7,037 yd.) course. Designed by Thomas McBroom and located above the Bras d'Or Lakes. Awarded the Best new course in Canada by Golf Digest 1998. One of the "Fabulous Foursome"
Highland Links	Ingonish Beach	Cabot	18-Hole Championship Golf Course designed by Stanley Thompson. This 72-Par (6,198 yd.) course is ranked the #1 course in Canada by Score Golf Magazine (July '00) and also ranked 57th in the world by Golf Magazine. The course is also a "Certified Audubon Co-operative Santuary." One of the "Fabulous Foursome"
Le Portage Golf Course	Chéticamp	Cabot	18-Hole, Par 72 (6,751 yd.) course also has a driving range and putting green. One of the "Fabulous Foursome"
Lingan Golf & Country Club	Sydney	Metro CB	18-Hole, par 72 (6,347 yd.) course.
Seaview Golf & Country Club	North Sydney	Metro CB	18-Hole, par 71 (6,120 yd.) course designed by Bob Moote.
Alderdale Greens	Point Edward	Metro CB	9 Hole, par 70 course
Passchendale Golf Course	Dominion	Metro CB	9 Hole, par 70 course
Lionel’s Golf Centre	Gardner Mines	Metro CB	9 Hole, par 70 course
P.Js Golf Centre	Sydney River	Metro CB	9 Hole, par 3 course

Cape Breton Visitor Information Centres

Location	Trail	Operating Months
Little Narrows	Bras d'Or	July-Aug
Parks Canada	Cabot	
Chéticamp	Cabot	May-Oct
Ingonish	Cabot	May-Oct
Baddeck	Cabot	May-Oct
Margaree	Cabot	June-Oct
Les Trois Pignons	Ceilidh	
Port Hood	Ceilidh	July-Sept
Louisbourg	Fleur-de-lis	June-Oct
Port Hastings	Fleur-de-lis	March-Oct
St. Peters	Fleur-de-lis	June-Oct
Sydney River	Marconi	June-Sept
North Sydney	Metro CB	July-Aug

APPENDIX D
List of Festivals and Events

Cape Breton Festivals and Events 2002

Date	Name of Festival/Event	Trail	Location
January – December (weekly)	West Mabou Square Dances	Ceilidh Trail	Mabou
January – December (Mondays)	Brook Village Adult Square Dances	Ceilidh Trail	Brook Village
February 10	Margaree Highlanders Snowmobile Drag Races	Cabot Trail	Margaree Valley
February 12	Pancake Supper, St. Patrick's Hall	Cabot Trail	Margaree Harbour
February 12	Shrove Tuesday Pancake Supper	Ceilidh Trail	Port Hood
March 17	Jigg's Dinner 11:30 pm-2 pm	Cabot Trail	Margaree Forks
May - September	Cape Breton's Largest Outdoor Flea Market	Metro Cape Breton	Whitney Pier
May 1 – October 31	Fortress Mystery Tours	Fleur-de-Lis Trail	Louisbourg
May 2	Annual Fishermen's Lobster Picnic	Ceilidh Trail	Mabou
May 17 – 19	Feis Mabou	Ceilidh Trail	Mabou
May 18	Feis a Chlachain/Village Festival	Bras d'Or Lakes	Iona/Grand Narrows
May 19 and October 13 (long weekends)	Scottish Concert*	Ceilidh Trail	Mabou
May 25	Louisbourg Spring Fair	Fleur-de-Lis Trail	Louisbourg
May 25 – 26	Cabot Trail Relay Race	Cabot Trail	
May 26	Annual Fishermen's Steak & Lobster Dinner	Ceilidh Trail	Judique
May 28	Lobster & Steak Dinner	Ceilidh Trail	Judique
June 1	7th Annual Donald Mackinnon Memorial Fishing Derby	Ceilidh Trail	Lake Ainslie
June 6	Marion Bridge 10km Road Race	Marconi Trail	Marion Bridge
June 8, 9	Orangedale Railway Station Open House	Bras d'Or Lakes	Orangedale
June 15 – October 15	Louisbourg Playhouse	Fleur-de-Lis Trail	Louisbourg
June 15 – October 20	Three Fiddler Concert & Ceilidh Dances	Cabot Trail	Margaree Valley
June 16 – September 16	Victorian Teas	Fleur-de-Lis Trail	Louisbourg
June 22	Cabot Day Celebrations	Cabot Trail	Dingwall
June 25 – September 17	Tuesday Night Ceilidhs	Ceilidh Trail	Mabou
June 25 – September 17	Wednesday Night Ceilidhs	Ceilidh Trail	Judique
June 27 – October 16	Isle Quilt Market	Fleur-de-Lis Trail	Port Hawkesbury
June 28 – July 1	Mabou Ceilidh	Ceilidh Trail	Mabou
June 18 – October 1	Ceilidh At The Creamery	Fleur-de-Lis Trail	Port Hawkesbury
June 29 – July 6	Mira Gala	Marconi Trail	Marion Bridge
July	East Margaree Parish Picnic & Family Fun Day*	Cabot Trail	Margaree Harbour
July – August (Thursdays)	Sounds Of Summer Concerts	Ceilidh Trail	Port Hood
July – August (Thursdays)	Glencoe Mills Family Square Dances	Ceilidh Trail	Glencoe Mills
July – August (Fridays)	SW Margaree Adult Square Dances	Cabot Trail	SW Margaree
July – August (Wednesdays)	Harness Racing	Ceilidh Trail	Inverness
July – September (Tuesdays)	Feasger Na Gaidhleg	Cabot Trail	Margaree Harbour
July 1	CANADA DAY	Island wide	Island wide
July 1	Canada Day Ceilidh in the Park	Ceilidh Trail	Port Hood
July 1 - 31	Baddeck Gathering Ceilidh	Cabot Trail	Baddeck
July 1 – August 30	Arkandor Summer Music Festival	Bras d'Or Lakes	Bras d'Or
July 1 - September 1	Dockside Ceilidh	Metro Cape Breton	North Sydney
July 3	Summer Ceilidh Series	Cabot Trail	St. Ann's

List of Festivals and Events

Date	Name of Festival/Event	Trail	Location
July 3 – August 28	Thursday Night Ceilidhs	Ceilidh Trail	Inverness
July 4	North River Centre for Performing Arts	Cabot Trail	North River Bridge
July 4 - September 26	Ceilidh With Triskele	Fleur-de-Lis Trail	Port Hawkesbury
July 5, 12, 26	Ceilidh Series, Octagon Arts Centre	Cabot Trail	Dingwall
July 5, 6	Glendale Ceilidh Days	Bras d'Or Lakes	Glendale
July 5, 7	North East Margaree Firefighters Fun Days	Cabot Trail	Margaree
July 6	Grand River Salmon Supper	Fleur-de-Lis Trail	Grand River
July 7	Strawberry Festival	Bras d'Or Lakes	St. Peter's
July 7 - 9	Route Saint Pierre Yacht Race	Fleur-de-Lis Trail	Louisbourg
July 7 - August 22	This is Cape Breton	Metro Cape Breton	Sydney
July 7 - August 25	Granville Green Concert Series	Fleur-de-Lis Trail	Port Hawkesbury
July 7, 21, 28	Chamber Music Series, Octagon Arts Centre	Cabot Trail	Dingwall
July 9 - August 30	Discovery	Metro Cape Breton	Sydney
July 10 - 21	Bay Bye Festival	Marconi Trail	Glace Bay
July 10 – August 17 (Wed to Sat)	Annette a Mal au Ventre (children's play)*	Cabot Trail	Chéticamp
July 10 -13	Cheticamp Arts Council Okazoo*	Cabot Trail	Chéticamp
July 11 – 14	Festival on the Lake	Bras d'Or Lakes	St. Peter's
July 12	Concert Under the Stars	Cabot Trail	St. Ann's
July 12	3rd Annual Inverness Crab Festival	Ceilidh Trail	Inverness
July 12 – 13	Firemen's Ceilidh Days	Ceilidh Trail	Scotsville
July 12 – 13	Judique On The Floor Days	Ceilidh Trail	Judique
July 12 – 14	Arichat Oceanview Festival	Bras d'Or Lakes	Arichat/Isle Madame
July 13	Traditional Codfish Supper	Bras d'Or Lakes	Iona/Grand Narrows
July 13 – 20	Big Wave Summer Festival	Bras d'Or Lakes	Bras d'Or
July 13 – 21	Summerfest	Bras d'Or Lakes	St. Peter's
July 13 – 21	Louisbourg Summer Celebration	Fleur-de-Lis Trail	Louisbourg
July 13 – 21	Rural Summer Festival Celebration	Fleur-de-Lis Trail	Louisbourg
July 13 – 21	Coal Dust Days	Marconi Trail	New Waterford
July 14	Chamber Music Series, Octagon Arts Centre	Cabot Trail	Dingwall
July 14	Joe Donovan Memorial Triathlon	Metro Cape Breton	North Sydney
July 14 – 21	Big Pond Summer Festival	Bras d'Or Lakes	Big Pond/Ben Eoin
July 14,21,28 and August 11,18	Souper-theatre (Acadian Meal)*	Cabot Trail	Chéticamp
July 15, 22, 29 and August 5, 12	Du Violon*	Cabot Trail	Chéticamp
July 17, 31	Gaelic College Summer Ceilidh Series	Cabot Trail	St. Ann's
July 18 – 21	Chapel Island Pow Wow	Bras d'Or Lakes	Chapel Island
July 19	Codstock	Bras d'Or Lakes	Arichat/Isle Madame
July 19	Ceilidh Series, Octagon Arts Centre	Cabot Trail	Dingwall
July 19 – 21	Whycocomagh Summer Festival	Bras d'Or Lakes	Whycocomagh
July 20	Parks Day	Cabot Trail	Baddeck
July 20	MaCaskill Cup Sailing Boat Race	Fleur-de-Lis Trail	St. Peter's
July 20 - 21	Sand Castle Art Competitions	Bras d'Or Lakes	Pondville & Point Michaud
July 20 - 21	Festival-By-The-Lake	Bras d'Or Lakes	West Bay
July 20 – 28	Dominion Seaside Daze	Marconi Trail	Dominion
July 21	Fishing Derby and Crabfest	Cabot Trail	Bay St. Lawrence
July 22 - 27	Inverness County Show of Hands	Ceilidh Trail	Inverness

List of Festivals and Events

Date	Name of Festival/Event	Trail	Location
July 22 - 28	Inverness Gathering	Ceilidh Trail	Inverness
July 24	Summer Ceilidh Series	Cabot Trail	St. Ann's
July 24 - 28	Baraco Days	Fleur-de-Lis Trail	Louisdale
July 24 - 28	Bartown Festival	Metro Cape Breton	North Sydney
July 25 - 28	Belle Cote Days/ Belle Cote	Cabot Trail	Belle Cote
July 25 - 28	L'Ardoise Acadian Days Festival	Fleur-de-Lis Trail	L'Ardoise
July 25 - 29	St. Ann's Annual Mission	Bras d'Or Lakes	St. Ann's
July 26-28	Rendezvous 2002	Fleur-de-Lis Trail	Arichat/Isle Madame
July 28	Chamber Music Series, Octagon Arts Centre	Cabot Trail	Dingwall
July 28	46th Annual Broad Cove Scottish Concert	Ceilidh Trail	Broad Cove
July 28	Broad Cove Concert/ Broad Cove	Ceilidh Trail	Broad Cove
July 28	Polish Festival	Metro Cape Breton	Sydney
July 28 - August 4	Clan MacNeil Celebrations	Bras d'Or Lakes	Iona/Grand Narrows
July 28 - August 4	Feill Nam Barrach/Barramen's Feast	Bras d'Or Lakes	Iona/Grand Narrows
July 29	Chestico Days Summer Festival	Ceilidh Trail	Port Hood
July 31 – August 3	La Swing du Suete*	Cabot Trail	Chéticamp
July 31 - August 15	Congres Mondial Acadien 2004	Island wide	Island wide
August 1 - 4	Lennox Passage Harbourfest	Fleur-de-Lis Trail	D'Escousse
August 2	Ceildh Series, Octagon Arts Centre	Cabot Trail	Dingwall
August 2 - 3	Louisbourg Crab Festival	Fleur-de-Lis Trail	Louisbourg
August 2 - 4	Festival de L'Escaouette	Cabot Trail	Chéticamp
August 3	Chestico Stepdancing Festival	Ceilidh Trail	Port Hood
August 3	Nova Scotia Highland Village Day	Bras d'Or Lakes	Iona/Grand Narrows
August 3 – 10	Bras d'Or Lakes Annual Regatta Week	Cabot Trail	Baddeck
August 3 - 11	Action Week 2002	Metro Cape Breton	Sydney
August 3 - 4	Margaree Summer Festival	Cabot Trail	Margaree Forks
August 4 - 11	Nicholas Denys Days & Come Home Yacht Race	Bras d'Or Lakes	St. Peter's
August 7	MacAskill Museum Auction	Bras d'Or Lakes	St. Peter's
August 7 - 14	Bluenose II Public cruises	Cabot Trail	Baddeck
August 7 – 10	Sonnez les Matines*	Cabot Trail	Chéticamp
August 8 to August 11	Festival Acadien de Petit Grat	Bras d'Or Lakes	Arichat/ Isle Madame
August 9, 16, 23, 30	Ceilidh Series, Octagon Arts Centre	Cabot Trail	Dingwall
August 10	2nd Annual Folk Festival, Community Centre	Cabot Trail	Bay St. Lawrence
August 10	Feis a 'Mhoid, Gaelic College, St. Ann's	Cabot Trail	St. Ann's
August 10	Johnny Miles 3 Mile Road Race	Marconi Trail	Syndey Mines
August 11	26th Annual St. Joseph du Moine Scottish Concert	Cabot Trail	Joseph du Moine
August 14 - 17	Port Lajoye (Musical)*	Cabot Trail	Chéticamp
August 17	Louisbourg Race Through Time	Fleur-de-Lis Trail	Louisbourg
August 17 - 18	Festival of Cape Breton Fiddling	Cabot Trail	St. Ann's
August 18	Aviation Day	Cabot Trail	Baddeck
August 18	Creignish Ceilidh By The Sea	Ceilidh Trail	Creignish
August 18	10^{th} Annual Kintyre Farm Scottish Concert	Ceilidh Trail	Judique
August 19 - 24	Cape Breton Farmers Exhibition	Metro Cape Breton	North Sydney

List of Festivals and Events

Date	Name of Festival/Event	Trail	Location
August 20 - 24	Feis An Eilean	Bras d'Or Lakes	Iona/Grand Narrows
August 20 - 25	Janvrin's Fest	Bras d'Or Lakes	Arichat/Isle Madame
August 22	World Premier of	Cabot Trail	St. Ann's
August 23	Johnstown Milling Frolic	Bras d'Or Lakes	St. Peter's
August 24	Isle Madame Seafood Festival	Bras d'Or Lakes	Arichat/Isle Madame
August 24	Bras d'Or Lakes Campground August Ceilidh	Cabot Trail	Baddeck
August 25	Suis-je dans un reve?	Cabot Trail	Chéticamp
August 25	Fete de Saint Louis/ Feast of Saint Louis	Fleur-de-Lis Trail	Louisbourg
August 28	Westmount Garden Club's Annual Flower Show	Metro Cape Breton	Sydney
August 29	Seombar Samhraidh a ' Chlachain	Bras d'Or Lakes	Iona/Grand Narrows
August 29 - September 1	River Bourgeois Community Festival	Bras d'Or Lakes	St. Peter's
August 30 - September 2	Summer Fun Days at Mackinnon's Campground	Ceilidh Trail	Lake Ainslie
August 30 - September 2	Summer Fun Days/ 7th Annual Bicycle Poker Rally	Ceilidh Trail	Lake Ainslie
August 31	Highland Village Hosts its Final Codfish Supper of the Summer	Bras d'Or Lakes	Iona/Grand Narrows
August 31 - September 1	Stone Mountain Music Festival	Bras d'Or Lakes	St. Peter's
August 31 - September 2	Cabot Trail Bicycle Tour	Cabot Trail	Cabot Trail
September 7	Pioneer Day	Bras d'Or Lakes	Iona/Grand Narrows
September 8	Sydney & Louisbourg Railway Reunion	Fleur-de-Lis Trail	Louisbourg
September 9	Cruise Ship Clipper Adventure	Fleur-de-Lis Trail	Louisbourg
September 20 - 22	West Bay Road Fall Fair	Bras d'Or Lakes	West Bay
September 20 - 29	PierScape	Metro Cape Breton	Sydney
September 21	Feis Chladaich a Tuath	Cabot Trail	Breton Cove
September 21	Harvest Home	Cabot Trail	Baddeck
September 22	Brook Village Parish Bazaar	Ceilidh Trail	Brook Village
September 29	Louisdale Fall Fair	Fleur-de-Lis Trail	Louisdale
October 5	Mabou Parish Bazaar	Ceilidh Trail	Mabou
October 11 - 19	Celtic Colours International Festival	Island wide	Island wide
October 12 - 14	L'Ardoise & District Volunteer Fire Department Fall Fair	Fleur-de-Lis Trail	L'Ardoise
October 20	Ben Eoin Fall Festival	Metro Cape Breton	Sydney
November 22 - 24	Christmas at the Centre	Metro Cape Breton	Sydney
November 23 - 24	Festival of Trees	Bras d'Or Lakes	St. Peter's
December 7 - 8	Ceilidh na Nollaig/Christmas Open House	Bras d'Or Lakes	Iona/Grand Narrows

Source: Travel Cape Breton 2002, 2002 Doers and Dreamers Guide, Tourism Cape Breton Website

* Note: The timing and frequency of many of the events and performances will vary from year to year

APPENDIX E
Inventory of Arts and Crafts Facilities

Inventory of Arts and Crafts Facilities

Name	Location	Product Description
Bear Paw Gift & Craft Shop	Inverness	Paintings and Photography by local artists. Handcrafts, knitting, crocheting, quilting, weaving.
Cultural Centre Gift Shop	Glendale	Gaelic and Celtic interest resources: books, video and audio tapes.
Judique Crafters' Guild	Judique	Handcrafted wall hangings and quilts, tartan items as well as other gifts and souvenirs
Sara's Crafts & Gifts Ltd	Port Hood	Known for their quilts. Many local crafts, pottery, Seagull pewter and t-shirts.
Scotsville School of Craft & Cap Site	Scotsville	CB crafts, handwoven tartan blankets and other woven and knitted items. Also offers craft classes.
Hillsdale Mohair	Judique	Knitwear, weaving, yarn, carded mohair, mohair fleece
MacLeod Highlander Farm	Port Hood	Wooden inlay puzzles, stand-up puzzles made of hardwood, paper cuts and tile maps.
Mabou Village Gallery	Mabou	Contemporary and traditional paintings, limited-edition prints, reproductions and photographs.
Suzanne Craig Designs - Bioprints	Mabou	The entire selection of Bioprints is available here, as well as notepapers, unique decorations and hand-wovens.
Arts North	Dingwall	Jewellery, pottery, quilts, woodworking, silk, weaving, and other crafts designed, handcrafted by CB residents.
Baddeck Yarns	Baddeck	High quality Nova Scotian and Canadian yarns, a large selection of books and pattern, kits and knitting supplies. Hand-knit sweaters etc.
Blue Heron Gift Shop	Baddeck	Nova Scotia books, cassettes and CDs. Cheticamp hooking, framed prints, NS and CB tartan. Posters, sweatshirts, jewellery.
Cape Breton Clay	Margaree Valley	Unique pottery.
Co-operative Artisanale De Cheticamp Ltée	Cheticamp	Wide selection of hooked rugs, souvenirs, t-shirts & sweatshirts. Also a restaurant and museum on premises.
Country Craft & Pottery Outlet	Dingwall	Quilts, pottery, woodworking, Irish knit sweaters, jewellery, tartan blankets, clothing and other crafts.
Cranberry Patch Fine Arts & Gifts	Cape North	Pottery, children's tartan clothing, quilts, hand-knits, blown glass, jewellery, woodworking.
Flora's Gift Shop	Cheticamp	Hooked rugs of all sizes, as well as other crafts such as pottery, pewter, jewellery and hand-knit sweaters.
Heavenly Angels & Glass Creations	Baddeck	Stained glass made on location, Nova Scotia crystal, blown glass and other glass crafts. A large selection of angels, Seagull pewter, porcelain etc.
Kidston Landing Country Store	Baddeck	Sweaters, pottery, pewter, books, prints blankets, wrought iron, NS & CB tartan, soapstone carvings, Mi'k maq baskets, maple syrup, carved decoys.
Lynn's Craft Shop and Art Gallery	Ingonish	Pottery, iron work, knitted accessories, candles, soaps preserves, watercolors by Nova Scotia artist Christopher Gorey.
Margaree Harbour Craft and Gift Shop	Margaree Harbour	Wool blankets, yarn, hand-knitted sweaters, hooking, Seagull Pewter, pottery, china, photography, local crafts and other fine gifts.
Scrub-N-Brush Crafts	Margaree Valley	Hand knit clothing. Fine Crocheting, cross-stitch, clothing, quilts, stained glass, tole painting, woodworking, all-occasion home decor items.
Sea Shanty Antique & Craft Shop	Englishtown	Old and new quilts, old hooked rugs, Cheticamp hooked items, pewter, local and Maritime crafts.
Seasonal Treasures Gallery & Gifts	Cheticamp	High quality handcrafts such as stained glass, art, wooden toys, hooked rugs, pottery, metal crafts, and pewter. Some made on

Name	Location	Product Description
		premises.
Seawinds Chandlery	Baddeck	Hand knit sweaters, mitts, framed NS prints, blankets, carved deco, buckets, windsocks, wind chimes.
Shape Shift and the Goose Cove Pottery	North River	Local potters specializing in hand-sculpted Raku art as well as decorative dinnerware.
St. Ann's Lobster Galley Restaurant and Gift Shop	St Ann's	Local folk art and crafts as well as an art display. Cappuccino and delectable desserts.
Tartans and Treasures	South Harbour	North America's largest collection of tartan ties, scarves and blankets. Kilts, tams, shawls, serapes, wool & mohair tartan blankets, and tartan clothing.
Two Macs	Margaree Valley	Hand-painted Canvas floor coverings by local artist Jennifer MacDonald as well as work by other local artists- prints, pottery, glass and jewellery.
Barachois River Basket Studio Leather Works	Tarbotvale Indian Brook	Baskets from willow, alder, rattan, and findings from nature. Belts, bags, wallets, and moulded leather vases as well as historic reproductions.
Peter Bauer Silverforge	Available in various shops in NS	One of kind hand-forged art jewellery.
Pipkin's Folk Art	Baddeck	Polymer clay jewellery, switch plates, thumbtacks, candleholders, pictures, vases, etc in many designs.
Sew Inclined	Wreck Cove	One of kind clothing, specializing in hats and wearable historical clothing.
Smelt Brook Studio	Smelt Brook	Potter/ driftwood assemblages. Can also be viewed at Arts North.
Galerie La Bella Mona Lisa	St Joseph du Moine	Paintings, prints, hand-woven textiles, quilts, wooden toys, fused glass, ceramics, folk art, burl bowls, handcrafted spoons, shaker boxes, and jewellery.
Iron Art & Photographs	St Ann's Loop	Unique and useful decorative iron hooks, coat and plant holders, sculptures and paintings. Hand-tinted black and white photographs.
Le Motif	Cheticamp	Folk art, rag rugs, jewellery, pottery, paintings, Cheticamp hooked rugs, carvings, etc.
Thistledown Gallery & Gifts	Baddeck	Hand-painted quilt blocks, sea rocks, paintings of docks and folk art seagulls. Pottery, woodturnings, prints and unique Maritime made gifts.
Wild Things Gallery	St Ann's Loop	Wood sculptures
The Ark/ L'Arche	Whycocomagh	Nova Scotia crafts, Mi'kmaq crafts, l'Arche crafts, and a variety of nativity scenes.
Woodswork Art	Kempt Head	Carved Sculptures, wood-burnings, and paintings.
Parlour Victorian Rubber Stamp Company	East Bay	Handcrafted fine-art rubber stamps.
The Pottery Garden	West Bay	Hand-built terra cotta planters and flowerpots.
Isle Quilt Market	Port Hawkesbury	Quilts and work of Nova Scotia artists.
A Bib or Two	Sydney	Unique gifts for babies of any age.
Cape Breton Centre for Craft and Design	Sydney	Promotes excellence in the field of craft and design, both professional and recreational, through education and training.
E. Ramsay Woodworking	Sydney Mines	Custom clocks: grandfather, grandmother, mantle desk, cabinet, wall, shelf, and corner clocks
Grey Seal Weaving Studio	Point Michaud	Specializing in damask silk scarves and shawls.
Leo MacNeil Designs	Sydney	Gallery giftshop, sculpture and woodcrafts. Everything made on site.
MacIssac Kiltmakers	St Peter's	Custom kiltmakers, alterations and repairs. Celtic gifts; Celtic jewellery.

Inventory of Arts and Crafts Facilities

Name	Location	Product Description
Sew Sweet Tartans and Fashions	Sydney	Jumpers, vests, skirts, shorts, and nightgowns in CB and NS tartan.
Tree Frog Herbs and Flowers	Sydney	Garden tour and tea: Tour our herb garden with over 100 herbs, flowers, two ponds followed by a herbal tea party.
Turnstone Pottery	Isle Madame	Stoneware and porcelain wheel-thrown pottery.

APPENDIX F
List of References

Cape Breton

- *A Study for Estimating Cape Breton Island Tourist Visitation.* Prepared for Enterprise Cape Breton Corporation by Gardner Pinfold Consulting Economists Limited, March 2001.
- *Cape Breton County Economic Development Authority – Action Plan 1995*
- *Cape Breton Marina Study.* Prepared for Development Isle Madame Association and Enterprise Cape Breton Corporation, December 2001.
- *Enterprise Cape Breton Corporation Annual Report 1999-2000.*
- *Plan for Community Based Municipal Development.* Prepared for County of Inverness by G. K. Nishi, Architect & CED Associates, April 1999.
- *Inverness County Tourism Product / Marketing Partnership Study.* Prepared by Icon Communications & Research Inc., September 2001.
- *Inverness County Community Based Development Plan.* Prepared by Icon Communications & Research Inc., October 1999.
- *Inverness County Tourism Market Study Final Report.* Prepared by Icon Communications Inc., November 1996.
- *Choice Not Circumstance – The Victoria County Strategic Plan.* Prepared by The Community Economic Development Committee of the Victoria County Council, June 2000.
- *Golf Destination Strategy for Cape Breton Island.* Prepared by KPMG, 2001.
- *Cape Breton Marina Study for Development Isle Madam Association and Enterprise Cape Breton Corporation.* Prepared by Market Research Associates Ltd., December 2001.

Nova Scotia

- *Managing Natural Resources on Crown Land – An Overview of Eastern Region* (Pictou, Guysborough, Antigonish, Victoria, Inverness, Cape Breton and Richmond Counties); February, 1998
- *Nova Scotia Integrated Tourism Plan 2002.* Prepared by the Nova Scotia Tourism Partnership Council.
- *The Nova Scotia Tourism Strategy 2000.* Prepared by the Nova Scotia Tourism Partnership Council, November 2000.
- *Nova Scotia Tourism Strategy. Summary Report of Tourism Industry Input Sessions.* Prepared by the Nova Scotia Tourism Partnership Council, May 2000.
- *Nova Scotia Partnership Opportunities 2002.* Prepared by the Nova Scotia Tourism Partnership Council.
- *Nova Scotia Partnership Opportunities 2001.* Prepared by the Nova Scotia Tourism Partnership Council.

- *Nova Scotia Product-Market Match Study, Final Report.* Prepared for the Nova Scotia Tourism Partnership Council and Nova Scotia Department of Tourism and Culture by The Economic Planning Groups of Canada, January 2000.
- *Tourism Product Development Annual Plan. 2002-2003 Product Priorities*. Prepared by the Nova Scotia Tourism Partnership Council, November 2001.
- *Nova Scotia Tourism Product Development Plan.* Prepared by the Nova Scotia Tourism Partnership Council, November 2001.
- *2000 Nova Scotia Visitor Exit Survey.* Prepared for Nova Scotia Department of Tourism and Culture by Corporate Research Associates Inc, October 2001.
- *2000 Nova Scotia Visitor Traffic Flow Report.* Prepared for Nova Scotia Department of Tourism and Culture by Corporate Research Associates Inc, February 2002.
- *The Business Case for Growing Tourism in Nova Scotia, Executive Summary*. Prepared by the Nova Scotia Tourism Partnership Council. November 2000.
- *Tourists Attraction Signing Policy*. Prepared by Nova Scotia Department of Tourism and Culture and the Department of Transportation and Public Works.
- *Tourism Development Guidelines Series.* Prepared by Nova Scotia Department of Tourism and Culture, 2002.
- *Nova Scotia Department of Natural Resources Business Plan 2002-2003.* Prepared by Department of Natural Resources. April 2002.
- *The Nova Scotia Culture Sector Strategy. Culture in the New Millennium.* Prepared by Nova Scotia Department of Tourism and Culture, September 1999.
- *Nova Scotia Department of Tourism and Culture Business Plan 2002-2003.* Prepared by Nova Scotia Department of Tourism and Culture.
- *Towards Sustainable Forestry. A Position Paper.* Prepared by the Department of Natural Resources Nova Scotia. 1997.
- *Keep it Wild. A Guide for Low Impact Recreation in Nova Scotia's Wilderness Areas.* Nova Scotia Department of Environment and Labour, Protected Areas Program, 2001.
- *Tourism Partnership Council, 2001 Report Card.* December 2001

Canada

- *National Tourism & Cuisine Forum: "Recipes for Success" Proceedings and final Report, Halifax, June 11-13, 2001.* Prepared by Culture Quest International for the Canadian Tourism Commission.
- *Canadian Ed-Ventures. Learning Vacations in Canada: An Overview.* Prepared by Nancy Arsenault for Canadian Tourism Commission, April 2001.
- *Best Practices Tour 2000 in Adventure Travel and Ecotourism.* Prepared for Canadian Tourism Commission by The Economic Planning Group of Canada, July 2000.
- *Catalogue of Exemplary practices in Adventure Travel & Ecotourism*, Prepared for Canadian Tourism Commission by Pam Wight & Associates 1999.

- *National Snowmobile Tourism Study Final Report.* Prepared for Canadian Tourism Commission by Pannell Kerr Forster, December 2001.
- *On Route to Sustainability, Best Practices in Canadian Tourism.* Prepared by Canadian Tourism Commission & Centre for Tourism Policy and Research, Simon Fraser University. Edited by Peter W. Williams & Isabel Budke, February 1999.
- *Catalogue of Exemplary Practices in Adventure Travel and Ecotourism.* Prepared for Canadian Tourism Commission by Pam Wight & Associates, 1999.
- *Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, Final Report*. Prepared for Canadian Tourism Commission by The Randolph Group, January 1997.
- *Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, Technical Appendix. Product and Market Analysis.* Prepared for Canadian Tourism Commission by The Randolph Group, January 1997.
- *Travel Activities & Motivation Survey (TAMS),* Prepared by Lang Research Inc., 2001.
- *RVC Buyer Profiles*. Prepared by the Tourism Industry Association of Canada (TIAC), 2000.
- *Values-Based Strategic Plan 1999-2002.* Aboriginal Tourism Team Canada, 1999.
- *The Importance of Nature to Canadians: Survey Highlights.* Prepared by Environment Canada, B.C. Ministry of Environment, Lands and Parks, Ministère de l'Environnement et de la Faune du Québec, Ontario Ministry of Natural Resources, Canadian Forest Service, Northwest Region, Memorial University of Newfoundland, Canadian Tourism Commission, 1999.
- *The Importance of Nature to Canadians: The Economic Significance of Nature-related Activities.* Prepared by Federal-Provincial-Territorial Task Force on the Importance of Nature to Canadians, for Environment Canada, 2000.

United States

- *1999-2000 National Survey on Recreation and the Environment.* Prepared by the U.S. Forest Service and the University of Tennessee, Knoxville, Tennessee.
- *Human Power Outdoor Recreation: State of the Industry Report 2000.* Prepared by The trade Association of the Outdoor Industry (ORCA), 2000.
- *The Adventure Travel Report 1997.* Prepared by the Travel Industry Association of America, January 1998.
- "Ecotourism Statistical Fact Sheet". Prepared by The International Ecotourism Society, 2000.
- "U.S. Ecotourism Statistical Fact Sheet". Prepared by The International Ecotourism Society, 1999.

Other International

- *Tourism Highlights 2001*. Prepared by the World Tourism Organization (WTO).

- *Ecotourism: Principles, Practices and Policies for Sustainability.* Prepared by M. Wood for the United Nations Environment Program and International Ecotourism Society, 2002.
- *Protecting Paradise: Certification Programs for Sustainable Tourism and Ecotourism.* The Institute for Policy Studies, October 2001.