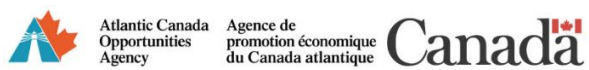


**Ingonish Development Society
Strategic Tourism Expansion Program (STEP)
2025 – 2027 Tourism Strategy**
July 11, 2024



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Appreciation

The successful outcomes of this project resulted from the many business owners, community leaders, volunteers, and residents who participated in the strategy development process. Their collaborative efforts and willingness to provide input and observations contributed significantly to helping inform the strategy recommendations. The BRAIN TRUST team wants to acknowledge and thank members of the Ingonish Development Society, the Ingonish and Area STEP Working Group and the staff from Victoria County, Destination Cape Breton, Tourism Nova Scotia, Parks Canada and ACOA who provided leadership and guidance throughout the process (Appendix 1).



Parks
Canada

Parcs
Canada

We also acknowledge the financial contributions made by the Government of Canada through its partners at the Atlantic Canada Opportunities Agency (ACOA, Tourism Atlantic). Their interest and commitment to enhancing Canada's tourism offering from coast to coast to coast is appreciated.



Canada



BRAIN TRUST

Land Acknowledgement

Ingonish is in Unama'ki, one of seven traditional districts of Mi'kma'ki, the ancestral and unceded territory of the Mi'kmaw People.

This territory is covered by the Treaties of Peace and Friendship.

We are all Treaty people, and we must respect and honour our rights as such.



Source: Destination Cape Breton, Eskasoni Cultural Journeys

Executive Summary

The Ingonish Development Society has formulated a comprehensive three-year Strategic Tourism Expansion Plan (STEP) to enhance the region's appeal and competitiveness. Done in partnership with Victoria County and with support from Tourism Atlantic (Atlantic Canada Opportunities Agency), the plan is built on a foundation of thorough market and destination analysis and community stakeholder engagement/validation.

In response to dramatic shifts in Canada's post-pandemic tourism economy, the Ingonish Development Society (IDS) identified the need to understand, adapt, and innovate to boost local economic growth through strategic tourism development within the Ingonish area. This strategy outlines a roadmap to capitalize on emerging market and traveller trends while leveraging the unique assets of the Ingonish area.

Preserving the place Ingonish citizens call home is a priority of the plan, which recognizes a balanced interest in the well-being of residents along with visitation growth and profits; these factors will measure success. While economic growth will strengthen the prosperity of tourism businesses, a regenerative development approach that factors in societal wealth and well-being and contributes to environmental sustainability will earn the favour of citizens, tourism operators, and visitors.

Key Findings

Ingonish is a picturesque coastal community that offers visitors natural and built culture, heritage, and outdoor recreation sites, attractions, and facilities. Visitors experience primary attractions like Cape Breton Highlands National Park and the Cabot Trail, Ingonish Beach, Cape Smokey, the Keltic Lodge Resort, and Highlands Links Golf Course, supported by limited retail and food and beverage options, including fresh seafood.

Throughout the planning process, five overarching Findings were identified.

1. **Mixed Interest in Community Tourism Development:** While the region has a rich history of welcoming visitors, tourism operators and citizens showed mixed interest at the outset of the development process. This interest grew somewhat as the planning process evolved.
2. **Preserve the Place We Call Home:** During the consultation process, an overwhelming agreement was expressed that embraced this concept, including the notion that "A Great Place to Live Is a Great Place to Visit." While new to some, the idea of putting the planet and people first through regenerative tourism development was soundly endorsed.
3. **Ingonish Vision and the Visitor Journey:** The vision and visitor journey maintain that Ingonish has the following core attributes:
 - Connections, relaxation, rejuvenation, appreciation, joy.
 - Warm and welcoming people.
 - A tapestry of natural beauty, breathtaking landscapes, and a unique, well-paced way of life.
 - Places of discovery with a rich culture, art and heritage, music and events, fresh seafood, and exhilarating outdoor adventure opportunities.

4. **Four-season Outdoor Recreation, Heritage, Arts, and Culture:** These anchor assets feature Cape Breton Highlands National Park (CBNP), the Cabot Trail, Cape Smokey, Highland Links Golf Course, and the North Highlands Community Museum. There are supporting festivals and events, as well as retail and food establishments, to help the core assets.



5. **“Linger Longer” is the Underlying Positioning:** The official Cabot Trail tourism map says the entire drive takes approximately five hours, reinforcing that visitors can “Do the Trail” relatively quickly. This thinking undermines the visitor’s journey and naturally shortens the length of stay and revenue-generating opportunities for tourism businesses.

Additional findings include Ingonish’s unclear positioning, gaps in wayfinding and visitor signage, challenges at Keltic Lodge due to the condition of the aging main lodge and cottages, and the underground infrastructure of Keltic In Road.

Development Imperatives

Several development imperatives were identified to respond to these overarching findings successfully and implement the identified recommendations and actions. These include:

- Victoria County facilitates strategy implementation in partnership with the IDS.
- Resource gaps for plan implantation must be identified early, and steps must be taken to fill these gaps through dialogue with government and tourism partners.
- Tourism Atlantic (ACOA) will take proactive steps to ensure plan implementation is realized.
- Destination Cape Breton, in partnership with Tourism Nova Scotia, will proactively support Ingonish destination development.
- Destination Cape Breton, in partnership with Tourism Nova Scotia, leads Ingonish (IDS and Victoria County) marketing activities.
- Partnership expectations and parameters must be clearly defined immediately following the approval of the strategy.
- Identified local partners (Cape Smokey, Keltic Lodge, CBHNP) will collaborate on the recommendations and actions detailed in the plan to support community-wide success.



Recommendations

The IDS, the community, and tourism sector stakeholders have validated and prioritized the following Recommendations, which are believed to be achievable over the next three years (September 2024 to March 2027). A series of tactics support each recommendation and identify who is responsible and when recommendations should begin.

1. Secure broad-based endorsement of the tourism strategy throughout the Ingonish area, reinforcing the underlying theme, “A great place to live is a great place to visit.”
2. Clarify roles and responsibilities for the implementation of the plan.
3. Foster the creation of new legendary visitor experiences through connections with local people.
4. Use existing events to stimulate overnight visitation in Fall and Winter.
5. Ensure the “Linger Longer” proposition drives development and promotional activity.
6. Take proactive steps to maximize the community's online presence, utilizing the learning from the Digital Footprint Analysis.
7. Ground tourism development in regenerative tourism practices.
8. Identify and, where possible, address service and infrastructure gaps in collaboration with others.



Introduction

Tourism was one of the fastest-growing economic sectors in the world. In Canada, annual tourism spending consistently grew from 2017 to 2019, outpacing the economy's annual growth rate. In 2019, total tourism spending hit an all-time high of \$105 billion. That year, tourism accounted for 748,000 direct jobs and supported 2 million jobs. One out of every ten workers had a job in or related to the sector. Additionally, Statistics Canada calculated that total government revenue in 2019 attributable to tourism was \$28.4 billion.

However, one year later, tourism spending dropped by half, down to just over \$53 billion. Domestic expenditures decreased by 40%, and international spending dropped by 87%. Direct jobs fell by 30%, a decline of 533,000, and all related jobs dropped by 23% to 1.6 million.

Many challenges continue to hinder the full global recovery of the sector. Economic and geopolitical difficulties persist. Inflation, high interest rates, volatile oil prices, and trade disruptions continue to impact transport and accommodation costs. Staff shortages remain a critical issue for tourism businesses grappling with high demand. Geopolitical tensions, such as the Hamas-Israel conflict and uncertainty surrounding the Russian aggression against Ukraine, could influence travel confidence and disrupt plans. As the world has reopened its doors to travel, the evolving landscape prompts both caution and enthusiasm among tourists and industry professionals alike.

Planning Context

A snapshot of travel performance is presented here to provide context for planning, strategy development and implementation of the Ingonish tourism strategy.

International Tourism Arrivals¹

- According to the UN Tourism (known as the United Nations World Tourism Organization) World Tourism Barometer, international tourism arrivals ended 2023 at 88% of pre-pandemic levels, with an estimated 1.3 billion international arrivals. Pent-up demand, increased air connectivity, and a more robust recovery of Asian and other markets fueled this recovery.
- According to preliminary estimates, international tourism receipts reached USD 1.4 trillion in 2023, about 93% of the USD 1.5 trillion earned by destinations in 2019.
- Total export revenues from tourism (including passenger transport) are estimated at USD 1.6 trillion in 2023, almost 95% of the USD 1.7 trillion recorded in 2019.
- Preliminary estimates on the economic contribution of tourism, measured in tourism direct gross domestic product (TDGDP), point to USD 3.3 trillion in 2023, or 3% of global GDP. This indicates a recovery of pre-pandemic TDGDP driven by vital domestic and international tourism.
- **The UNWTO predicts a full recovery of international tourism arrivals to pre-pandemic levels in 2024, with an estimated 2% growth above 2019.**



¹ UNWTO. World Tourism Barometer. January 2024.

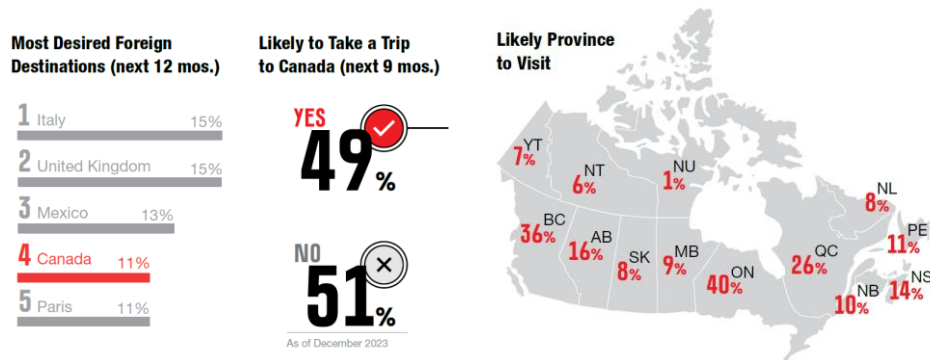
Canada's Tourism Performance²

Through December 2023, overnight travel to Canada showed signs of recovery, depending on which lens is used to evaluate recovery. While spending exceeded the 2019 benchmark by 8%, overnight visitors are 17% below 2019.

- **Canada welcomed 18.3 million overnight visitors in 2023, an increase of 43% over 2022 and 83% of annual 2019 arrivals; however, total yearly tourism revenue surpassed pre-pandemic levels in 2023, reaching 108% of 2019 tourism spending levels.**
- Demand from Canada's key markets, as indicated by search volume for Canadian travel, remained high through the end of 2023, with all markets surpassing the pre-pandemic baselines by the end of Q4. Additionally, Canada remains high on the consideration list among American travellers for an international trip in 2024.
- Spending by domestic travellers (110% of 2019 levels) and international visitors (103% of 2019 levels) recovered the most through December 2023.
- Annually, tourism spending rose 13.5% in 2023 after increasing 50.4% in 2022. Tourism GDP grew 9.5% in 2023, with growth in all categories. Transportation (+25.5%) accounted for nearly half of the yearly gains.
- While the Canadian labour force in general expanded 5.8% over its pre-pandemic level through December 2023, the labour force active in the tourism sector remained 5.3% below its pre-pandemic level.

U.S. Visitation and Traveller Intent³

- **There were 12.8 million U.S. overnight visitors, 41% more than in 2022 and 85% of 2019 arrivals.**
- Americans represent Canada's number one visitor market, and as such, their 2024 travel intentions are encouraging, as reported in the charts below.
- Nova Scotia is the most likely destination for Americans to travel within Atlantic Canada.






² Destination Canada Quarterly Snapshot – Q4, 2023. Statistics Canada, National Tourism Indicators, Q4 2023. Data released March 27, 2024.

³ Destination Canada Destination Analysts. The State of the American Traveller, Dec 18-25, 2023.

International Visitation⁴

- There were 5.6 million visitors who arrived from overseas (78% of 2019).

Year-to-date arrivals by mode of entry, border counts
Year-to-Date December 2023

Mode	★	🌐	Total
	4,607,775 90% vs. 2019	4,756,072 81% vs. 2019	9,363,847 85% vs. 2019
	7,700,742 85% vs. 2019	748,436 74% vs. 2019	8,449,178 84% vs. 2019
	474,431 55% vs. 2019	56,753 22% vs. 2019	531,184 48% vs. 2019
Total	12,782,948 85% vs. 2019	5,561,261 78% vs. 2019	18,344,209 83% vs. 2019

- Through Q4 2023, Canadian international air connectivity surpassed 2019 levels and slightly outpaced the global average for international route recovery, which bodes well for a full recovery in 2025.
- All entry modes from international (and U.S.) destinations remain well below 2019 levels.



2024 and Beyond

Destination Canada, in its May 2024 strategy, *Tourism 2030: A World of Opportunity*, indicated increased visitation will drive full recovery and has set ambitious visitation performance targets, along with a focused approach, to meet those targets.

Unlocking a World of Opportunity – “In 2019, the sector set a new benchmark of \$105 billion in revenue. Based on expected market conditions, the status quo between now and 2030 would take us to \$140 billion in revenue. While this represents growth, it barely compensates for inflation, offering little advancement for tourism businesses and their employees. Aiming for transformative growth, however, gives the sector the potential to grow to \$160 billion annually in revenues by 2030*, a \$20 billion annual difference that propels all of us to the next level - a 6.1% year-over-year growth rate for businesses that support communities across Canada. Among the total revenues of \$160 billion, it is anticipated that \$49 billion will stem from tourism exports, reflecting spending by international visitors in Canadian destinations, and \$111 billion is expected to result from expenditures by Canadians within Canada, inclusive of fares paid to Canadian carriers.”

Tourism 2030: A World of Opportunity, Destination Canada, May 2024.

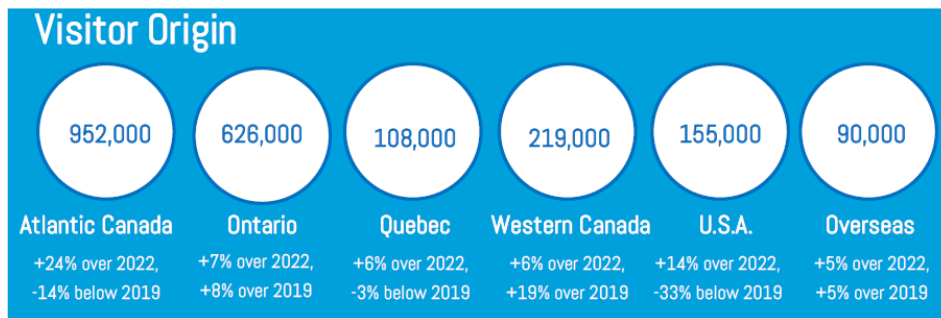
**Tourism Outlook Fall 2023, Destination Canada, Tourism Economics.*

⁴ Statistics Canada, Table 24-10-0055-01 (data released February 23, 2024).

Nova Scotia Tourism Performance⁵

Nova Scotia’s tourism performance continued to show positive signs of recovery in 2023. This growth occurred despite several uncontrollable factors. In late May and early June, Nova Scotia experienced significant wildfires in multiple locations. In addition, heavy rainfall and flooding in several areas also prompted a state of emergency in the province in late July.

- **In 2023, Nova Scotia welcomed 2.2 million visitors, an increase of 14% (or 266,000 more visitors) compared with 2022. Compared with 2019, 2023 visitation was down by 6% (or 149,000 fewer visitors).**
- Of these 2023 visitors, 1.3 million arrived by road (up 15% compared with 2022 and down 13% compared with 2019).
- Visitation to Nova Scotia by air increased by 12% compared with 2022, with 813,000 visitors arriving in 2023 (up 7% from 2019).



The primary contributor to lower visitation in 2023 compared with 2019 was a softness in visitation recovery from Atlantic Canada and the United States.

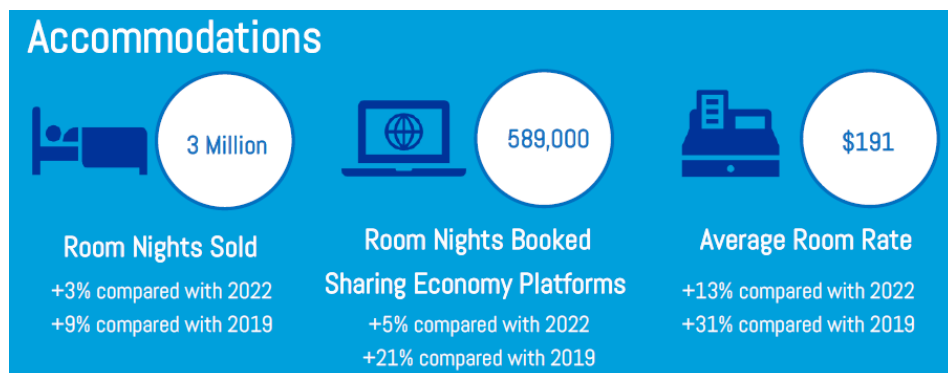
- 952,000 Atlantic Canadians visited Nova Scotia in 2023, an increase of 24% compared with 2022 (184,000 more visitors) but a decrease of 14% compared with 2019 (156,000 fewer visitors). Atlantic Canadians have the most significant % of visitors to the province at 44%.
- Visitation from the US also increased in 2023, with 155,000 visitors arriving in 2023 (a 14% increase compared with 2022); however, it is still down by 33% compared with 2019 (77,000 fewer visitors).
- Ontario remains a crucial market for Nova Scotia, with 626,000 visitors arriving in 2023, +7% (41,000 more visitors) compared with 2022 and +8% (49,000 more visitors) compared with 2019. Visitors from Ontario accounted for 29% of total visitors to Nova Scotia in 2023.
- Visitation from overseas markets increased by 5% compared to 2022 and 2019, with 90,000 visiting Nova Scotia in 2023.

⁵ Tourism Nova Scotia. Tourism Statistics. January – December 2023. <https://tourismns.ca/accommodation-statistics>

Nova Scotia Accommodation Performance⁶

Accommodation sales in Nova Scotia continued to increase during 2023, with room nights sold surpassing 2022 and 2019 pre-pandemic levels.

- **Nova Scotia accommodations operators reported 3 million room nights sold in 2023, a 3% increase (80,000 more room nights sold) compared with 2022 and a 9% increase (235,000 more room nights sold) over 2019.**
- All tourism regions experienced growth in 2023 compared with 2019.
- Compared with 2022, four tourism regions reported continued growth in room nights sold in 2023:
 - Halifax Metro, up 4% (61,000 more room nights sold)
 - Bay of Fundy & Annapolis Valley up 7% (26,000 more room nights sold)
 - Northumberland Shore up 3% (6,000 more room nights sold)
 - Eastern Shore, up 6% (1,000 more room nights sold)
- The other three regions experienced declines in room nights sold compared with 2022:
 - South Shore, down 3% (6,000 fewer room nights sold)
 - Yarmouth & Acadian Shores, down 5% (4,000 fewer room nights sold)
 - Cape Breton, down 1% (3,000 fewer room nights sold)
- According to AirDNA data, there were 589,000 room nights booked through sharing economy platforms in 2023, an increase of 5% compared with 2022 and up 21% compared with 2019.
- **According to the latest data from the CBRE Hotels National Market Report⁷, the average room rate for Nova Scotia accommodations was \$191 for 2023, an increase of 13% over 2022 and a rise of 31% compared with 2019.**
- **The average room rate in the Halifax Regional Municipality was \$206, up 14% over 2022 and up 34% over 2019, while the average room rate of \$151 in the rest of Nova Scotia was up 9% compared with 2022 and up 24% compared with 2019.**









⁶ Ibid

⁷ CBRE Hotels National Market Report. January – August 2023 Accommodation Performance.

Cape Breton Economic Assessment

In 2023, the Cape Breton Partnership (CBP) engaged KPMG LLP (KPMG) to conduct an economic impact assessment (EIA) of the current state of Cape Breton Island’s (CBI) tourism sector. The assessment report, published in December 2023, presented a very optimistic picture of CBI's tourism performance and potential.

Comparison of Cape Breton Island and Nova Scotia Tourism Impacts⁸

Indicator	Unama'ki CBI	Nova Scotia	Share of Unama'ki CBI to Nova Scotia
 Population	132K	969K	13.6%
 Annual visitors	422K – 551K	2.2M – 2.7M	20%
 Tourism Output	\$575M – \$721M	\$3.1B – \$4.0B	18% – 19%
 Tourism GDP	\$306M – \$383M	\$1.6B – \$2.1B	18% – 19%
 Tourism Taxes	\$35M – \$43M	\$184M – \$236M	18% – 19%
 Tourism Jobs ²	6.8K – 8.5K	36K – 49K	17% – 19%





Source: KPMG Analysis

The table above illustrates that CBI tourism impacts far exceed their relative population share to Nova Scotia. While CBI accounts for approximately 13.6% of Nova Scotia’s population, it attracts about 20% of the visitors. Further, the CBI tourism sector accounts for 17% - 19% of the province’s tourism output, GDP, taxes, and jobs⁹.

⁸ The Cape Breton Partnership Economic Impact Assessment. KPMG LLP. Dec. 13, 2023.

⁹ Ibid.

Comparison of Cape Breton Island and Nova Scotia Impacts Per Dollar



Indicator	Unama'ki CBI	Rest of Nova Scotia ³	All of Nova Scotia ⁴
 Tourism Output	\$2.62 – \$2.63	\$2.0 – \$2.2	\$2.1 – \$2.2
 Tourism GDP	\$1.39 – \$1.40	\$1.1 – \$1.2	\$1.1 – \$1.2
 Tourism Taxes	\$0.16	\$0.12	\$0.13
 Tourism Jobs ⁵	31	24 – 27	25 – 27

Source: KPMG Analysis



The table above illustrates the strength of impacts per dollar for Cape Breton Island’s tourism sector compared to Nova Scotia’s. A dollar of visitors spent in Cape Breton Island generates higher tourism output, GDP, taxes, and jobs than Nova Scotia¹⁰.

Cape Breton Future State Opportunities/Impacts





The KPMG study explored four future state growth scenarios where mutually exclusive visitation variables were modified, holding all else constant (e.g., only one visitation variable is modified in isolation per scenario). The scenarios selected include:

 Scenario 1: Growth in year-round Tourism	 Scenario 2: Longer trip Duration
Description: This scenario explores a future where Unama'ki Cape Breton Island experiences increased visitation during its off-season/winter months from November to March	Description: This scenario estimates the impacts of visitors spending more time on the Island.
Rationale: Based on stakeholder insights expressing the desire for year-round operation and case studies from Whistler (a four-season destination) and Banff National Park (a seasonal destination with more established winter tourism).	Rationale: Stakeholders expressed that tourists consider the Cabot Trail region as a scenic drive rather than a destination. Additionally, tourism in non-Cabot Trail regions, which could encourage longer stays and excursions, are less well-known. Data from Tourism Nova Scotia also supports the possibility of increasing trip duration.

¹⁰ Ibid.

 Scenario 3: Focusing on high impact subsectors	 Scenario 4: Attracting high value visitors.
Description: This scenario estimates the impacts of changing the composition of Unama'ki Cape Breton Island's subsectors towards "higher impact" subsectors.	Description: This scenario estimates the impacts of attracting visitors who spend more while visiting Unama'ki Cape Breton Island.
Rationale: Unama'ki Cape Breton Island's largest tourism operators are substantially investing in expanding their activity offerings and accommodations. This scenario shows how growth in subsectors could affect impacts.	Rationale: Based on stakeholder insights expressing the desire to attract and diversify their consumer demographic, as well as data from Tourism Nova Scotia which also supports potential growth of increasing average visitor expenditure.

Cape Breton Future State Analysis Summary

Scenario	Range of additional impacts on total output	% increase from baseline output	Impact assessment
 Scenario 1: Year-round tourism	\$31M – \$137M	5% – 24%	Strong
 Scenario 2: Longer trip duration	\$63M – \$252M	11% – 44%	Very Strong
 Scenario 3: Focusing on high-impact subsectors	\$2M – \$8M	0.2% – 1.4%	Weak
 Scenario 4: Attracting higher value visitors	\$29M – \$115M	5% – 20%	Strong
Total potential growth opportunity: \$125M – \$512M (22% – 89%)			

Source: KPMG Analysis

Based on the analysis, the future impacts generated showed strong potential for economic growth. Almost half of the total potential impact could be realized by attracting longer visitors, with all else being held constant¹¹.

Information in the KPMG Impact Study supports efforts to responsibly grow tourism visitation to Cape Breton, Victoria County, and the Ingonish area through focused and intentional tourism development and marketing.

¹¹ Ibid.

Victoria County Tourism Performance

Annual Accommodation Occupancy¹²

Year	Occupancy Rate	Projected Units Sold	Total Units Available	Reporting Rate
2019	52	101695	198809	94
2020	25.7	38209	147590	96.2
2021	37.3	59989	159387	95.9
2022	48.4	113596	236808	89.9
2023	45.9	111133	239562	87.8

Accommodation Occupancy – 2023¹³

Month	Occupancy Rate	Projected Units Sold	Total Units Available	Reporting Rate	Properties Reported
Jan	8.5	1149	13485	91.7	29
Feb	10.8	1293	12003	93.5	31
Mar	11.8	1597	13516	92.9	30
Apr	10.1	1453	14437	89.6	30
May	23.4	6028	25733	87	47
Jun	44.2	14282	32310	86.9	58
Jul	70.1	23545	33602	87	60
Aug	76.1	25553	33600	87	60
Sep	62.7	20546	32776	86.3	56
Oct	55.8	15687	28100	85.7	53
Nov	*	*	*	64	24
Dec	*	*	*	54	18

*Indicates months with insufficient accommodator reporting data.

In reviewing Victoria County’s accommodation performance in 2023, the Spring and Fall shoulder seasons represent an opportunity for growth, given that in June, September, and October, there are a similar number of rooms available as in July and August. Creating reasons for visitors to consider an overnight trip to Victoria County and Ingonish in these months could positively impact annual visitation and revenue.

¹² Tourism Nova Scotia. Fixed Roof Occupancy by Geography Report – Victoria County. YTD December 2023. TNS needs monthly occupancy reports from properties with at least 85% of units available to publish data.

In April, July and Dec 2022, our reporting threshold in Victoria County was below 85% for those months.

¹³ Tourism Nova Scotia. Fixed Roofed Accommodation Report – Victoria County. YTD December 2023.

Ingonish 2024 – 2027 Tourism Strategy

The Strategic Tourism Expansion Program (STEP) is a sustainable tourism development planning process focusing on tourism experiences. It is designed to help Atlantic Canada communities and SMEs with above-average potential develop experiential tourism products and techniques for digital/online marketing enhancement and tourism investment in collaboration with SMEs.¹⁴

A project of Tourism Atlantic, a division of ACOA, STEP is a framework for tourism development customized to the needs of communities in Atlantic Canada. A series of steps guide communities through a strategic process of building and executing a Sustainable Tourism Plan focusing on product clustering, SME excellence, digital/online enhancement, and value-added product/experience development.

The Ingonish STEP process involved many partners, including the Ingonish Development Society (IDS, the project proponent), Victoria County, Destination Cape Breton, Tourism Atlantic (ACOA), Parks Canada, and Tourism Nova Scotia.



“The IDS mission is to establish the infrastructure and resources that constitute “the Ingonish Experience. Through supporting and educating stakeholders and community members in the spirit of cooperation, they can become a sustainable tourism destination that can be shared with the world.”¹⁵

The IDS's efforts initiated ACOA's STEP strategy development process. In January 2023, a Request for Proposal for a certified STEP tourism consultant was issued. In March 2023, the IDS awarded the assignment to Brain Trust.

The IDS identified the following deliverables in their Request for Proposal:
“STEP will assist Ingonish in becoming a sustainable tourism destination by exposing community entrepreneurs and influencers to varied techniques and formulas required for sustainability. The STEP process will focus the Ingonish Development Society and community on strategic planning, building tourism capacity and experiential product development.” IDS STEP RFP, Feb. 23, 2023

The IDS is comprised of various industry stakeholders in the community. These stakeholders include business owners and operators of Ingonish area accommodations, restaurants, food markets, and craft artisan shops. For the STEP process, the IDS formed a Working Group of engaged stakeholders, including residents, to work with the consultant actively throughout the process.

¹⁴ A STAR Area or Region is defined as a geographic area with definable characteristics but not permanently fixed boundaries and is typically comprised of several communities and more than 4,000 people.

¹⁵ Ingonish Development Society. STEP Request for Proposal. Jan. 2023.

Partners followed a strategic, collaborative, and community-based process, producing a three-year tourism development strategy.

The process required:

- Active participation from tourism stakeholders, local organizations, governments, and residents.
- Alignment with Destination Cape Breton strategies.
- Collaboration to identify regional opportunities and strategies to enhance the hosting economy.

Three fundamental imperatives guided the development process:

- **Destination Alignment** – Industry, community and government alignment drive destination brand, responsible visitation, and revenues.
- **Connection to Communities** – Destinations belong to the people who call them home. A locals-first approach is destination development with sustainable goals, filtered through a lens of resident quality of life, economic prosperity, sociocultural vibrancy, inclusiveness, and environmental thrive ability.
- **Connection to the Visitor** – Being visitor-friendly through the visitor's journey ensures visitors feel welcome and can access information and services that make their visit a positive experience.

Ingonish and Area

Ingonish is a 4-season destination on the world-famous Cabot Trail at the northeastern tip of Cape Breton Island. The Canso Causeway connects Cape Breton Island to the Nova Scotia mainland. About 15% of Nova Scotia's population lives on Cape Breton Island. Three cultures come together on Cape Breton Island: Mi'kmaq, Acadian, and Gaelic.

The Ingonish area has four iconic tourism demand generators: Cape Breton Highlands National Park, Cape Smokey, the Keltic Lodge, and the Highlands Links Golf Course. The area features fresh seafood, beautiful beaches, fantastic hiking and cycling trails, a rich cultural history, a long list of events, the world-renowned Celtic Colours International Festival, and many welcoming locals willing to share this special part of Atlantic Canada. Tourists' primary reasons for visiting are to see the stunning coastal views and highland scenery and experience music, seafood, and coastal history and culture.



Regarding the planning context, the customer has changed, and travel behaviour and motivations have been dramatically altered post-pandemic. For example, Destination Canada suggests visitors desire more frictionless travel supported by enhanced technology and a shift to more responsible travel with a socio-environmental focus. In addition, they have identified a heightened interest in Indigenous tourism, outdoors and nature-based destinations, and health and well-being tourism.

Additionally, Destination Canada has identified two critical factors when understanding new travellers and how to succeed in attracting them to specific destinations, like the Ingonish.

High-Value Guests (HVGs) – Travellers with a higher-than-average income who travel more frequently and intend to travel in 2024 and beyond. These guests leave a destination better than they found them and appreciate local culture by contributing to the host community's economy. They visit and interact with places and people respectfully and make travel choices based on the availability of extraordinary experiences and a sense of life enrichment. HVGs display the following characteristics:

- **Appreciate Slow Travel** - It is not about checking off boxes or seeing as many things as possible in the shortest amount of time but relishing moments of rejuvenation.
- **Learners and the Naturally Curious** - They want to feel inspired by their surroundings and learn more about the history of the place they're staying and the stories of the people around them.
- **Actively Seeks Culture and Events** - They want to get out and experience exciting and life-enriching things.
- **Engages With Locals** - They want to try the local dishes and immerse themselves in the local customs. In many ways, they want to feel like they're one of the locals.
- **Experience Over Price** - For these travellers, extraordinary experiences are priceless. Price always plays a role but is not as crucial to high-value guests.
- **Leave the Places They Visit Better Than They Found Them** - They want to give back rather than take from the places they visit.

High-value guests also align with Tourism Nova Scotia, Destination Cape Breton, and Destination Canada's EQ target market segments, which include Authentic Experiencers, Cultural Explorers, and Free Spirits. There is supporting data that defines these guests' travel behaviours and motivations, which should be utilized to inform the implementation of the strategies. Note: Destination Canada is currently updating the EQ market segments. This work is expected to be released in 2024.

Legendary Experiences – In the near term, successful tourism development in Ingonish will not be based solely on significant investments in tourism-related infrastructure, like at Cape Smokey, but on leveraging the power of existing tourism assets like the fantastic coastal landscapes and the four-season outdoor recreation features.

Once again, taking the lead from Destination Canada (DC) will be of value to tourism and community stakeholders. DC suggests destinations need exceptional, inimitable travel experiences reflecting our country's essence and diverse fabric to attract high-value guests. Legendary experiences are unforgettable travel experiences that reflect Ingonish characteristics, themes, and narratives. Experiences preserve and celebrate the heritage, local cultures and traditions, natural surroundings, and coastal landscapes. Through effective engagement, ongoing training, and capacity building with a broad base of stakeholders, new or enhanced legendary experiences can be developed.

A New Reality

The hiatus from travel from 2020 to 2022 forced new conversations. Globally, tourism management organizations and community leaders identified the need to shift to more responsible travel with a greater focus on socio-environmental factors. They supported a greater interest in the well-being of communities and residents rather than visitation growth and profits to measure success.

As a result of the global reset related to future travel, many destinations, including many in Canada, are adopting a regenerative tourism approach. This approach encourages a move beyond conventional measures of growth and revenue. It considers community well-being, environmental impact, and cultural vibrancy. A regenerative approach also suggests that destinations reassess target audiences and the timing of visits to utilize capacity better and improve ROI.

As Ingonish embarks on tourism development, investments, infrastructure, and policies must consider better support for the community and the tourism sector. The goal is revenue growth, making businesses more profitable and communities more prosperous.

While accurate, transformative growth will strengthen prosperity for tourism businesses, a regenerative approach that factors in societal wealth and well-being and contributes to environmental sustainability will earn the favour of citizens, tourism operators, and visitors.

Destination Canada stated this to help guide Canada's approach to regenerative tourism development:

"The hosting economy is finally being seen for its power as a community-builder, a job generator, a path to reconciliation, a protector of natural assets, and as an enabler of Canada's identity and broader global ambitions. We want a sector that produces profitable business growth and net benefits for our communities from a thriving, regenerative tourism ecosystem."

This approach to tourism development in Ingonish was seriously considered. Throughout the community consultation process, participants were eager to understand the thinking behind the regenerative approach. The idea resonated and was welcome news, particularly for residents who attended the consultation sessions.

Those implementing the strategy are encouraged to explore how regenerative tourism development translates at the community and business levels.

Destination Cape Breton is leading the way in this regard with several regenerative activities for communities and tourism operators, including introducing the Rainbow Registered and various sustainable tourism programs, like GreenStep. These initiatives can help develop inclusive and responsible elements of tourism development at the community and operator level.

The Rainbow Registered Program helps businesses, organizations, and communities to certify their status as 2SLGBTQI+ friendly. Accredited businesses benefit from guidelines that provide information, advice, and resources to ensure that 2SLGBTQI+ customers feel welcome and accepted. GreenStep Sustainable Tourism, among other programs, is a national initiative that provides assessments, programs, and certifications to help tourism destinations and businesses measure and improve their sustainability performance.

In 2023, an example of regenerative tourism development was launched in the Annapolis Valley, NS. Stakeholders created Food Art Nature – visitor experiences built on regenerative tourism principles.

The FAN Project¹⁶ (Food, Art, Nature) represents the emergence of a non-traditional collaborative from within a community/region. According to Celes Davar, a partner in the initiative, FAN was inspired by a quote about purpose-led travel from James Thornton, CEO of Intrepid Travel:

"We fundamentally believe the travel industry can only rebound stronger if it builds more responsibly. So, we shouldn't be aspiring for things to go back to normal, but rather redefining what normal means and use this time as a rare chance to think about how we travel and how we can aim to be more ethical and sustainable travellers and global citizens in the future."

The FAN project includes the Wolfville Farmers Market Cooperative, the Blomidon Naturalist Society, and a private-sector tourism operator, Earth Rhythms. The group explored how to offer new food, art, and nature experiences that reflect the people and stories in the Annapolis Valley, NS, while respecting the people and place where experiences occur. The endeavour includes 12 experiences launched to encourage visitors to stay longer and get closer to what is local and authentic in the Annapolis Valley.

Planning Process

A comprehensive tourism destination development planning process was implemented:

1. First Proponent and Working Group meeting, April 12, 2023
2. Regional desk-based research, establish a working committee, asset inventory
3. Community launch sessions, introduction to STEP, May 31, June 1
4. Key Informant Interviews initiated and ongoing throughout the process
5. Visioning, Benchmarking, Idea Generation sessions, June 26, 27
6. Digital Footprint Analysis underway
7. Findings, Observations, Implications sessions, Experiential Tourism Training sessions, Oct. 17, 18
8. Prepare Draft I Plan, review with proponents, January 19, 2024
9. Draft Plan II validation, review with proponents, March 1
10. Present DRAFT III Plan to Working Group, April 17
11. Community Draft Plan Validation sessions, May 6, 7
12. Plan Refinement and proponent approval, June 2024



¹⁶ Celes Davar. Earth Rhythms Inc. is a Partner in the FAN project.

Community and stakeholder input, feedback, and validation were secured throughout the planning process. From project proponents, government partners, tourism stakeholders, and Ingonish citizens, the consultation process effectively engages stakeholders and builds consensus on the findings, observations, recommendations and actions for the 2024 – 2026 tourism strategy.

IDS, Victoria County, Destination Cape Breton, and the Working Group - Fully embraced the development process and outcomes.
Community Stakeholders and Tourism Operators - Positive and supportive participation, providing constructive feedback and validation.
Tourism Atlantic (ACOA) - Enthusiastically supports the process outcomes and will be an active partner for implementation.
Tourism Nova Scotia - Support the outcomes as they align with TNS’s direction and priorities.

Invitations – Findings, Observations Implications Sessions and the Experiential Tourism Workshops



Strategic Tourism Expansion Programme (STEP)
YOU ARE INVITED
 STEP FINDINGS, OBSERVATIONS, IMPLICATIONS SESSIONS

October 17 & 18, 2023

STEP SESSIONS

Following several months of discovery and in partnership with the Ingonish Development Society, ACOA, Tourism Nova Scotia, Destination Cape Breton, and Victoria County, our consultant, Richard Innes, will share the findings, observations and implications related to our STEP Tourism Destination Development Strategy. The purpose of the sessions is to secure stakeholder feedback and input before strategy completion.

October 17
 Presentation of Findings and Implications
 10:00 am - 11:30 am - Ingonish Fire Hall
 6:00 pm - 7:30 pm - Ceilidh Hall, Keltic Lodge

October 18
 Presentation of Findings and Implications
 1:30 pm - 3:00 pm - Ingonish Fire Hall

RSVP:colleen.whelan-smith@victoriacounty.ca

Who Should Attend:
 The Findings and Implications sessions are open to anyone interested in contributing to the region's tourism development. Residents, community volunteers, elected officials, business owners, and tourism operators are welcome.




DO YOU WANT TO BE A TOURISM OPERATOR IN INGONISH?
THIS SESSION IS FOR YOU!

EXPERIENTIAL TOURISM DEVELOPMENT WORKSHOPS

Richard Innes, Ingonish Development Society's tourism consultant, will facilitate two Experiential Tourism Development Workshops for residents and business owners and who are interested in learning the skills to develop and deliver visitor experiences that can be retailed to tourists to enhance their visit. Destination Canada suggests that legendary experiences are what attracts and meets current traveller preferences. The workshop will present the components of successful experiences and provide relevant instruction on how to go about creating compelling experiences.

October 17
 Experiential Tourism Workshop
 2:00 pm - 4:00 pm - Ingonish Fire Hall

October 18
 Experiential Tourism Workshop
 10:00 am - 12:00 pm - Ingonish Fire Hall

RSVP:colleen.whelan-smith@victoriacounty.ca

Who Should Attend: The Experiential Tourism Workshop is designed for individuals and businesses who have potential to create and deliver visitor experiences.

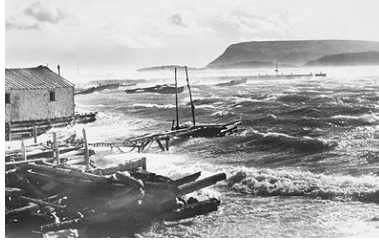
Experiential Tourism – What is it?

- A tourism product is what you buy; a tourism experience is what you remember.
- Experiences preserve and celebrate our heritage, cultures, traditions, natural surroundings through connections with people.
- Experiences are designed and led by locals.
- Experiences engage, excite, are relevant, and memorable.
- Experiences are regenerative – they are frictionless, minimizing the carbon footprint on the landscape, take into consideration the visitor's needs, and where possible, contribute to restoring ecosystems and community infrastructure.
- Experiences generate income for experience providers and contribute to the local economy.



Findings and Observations

Ingonish, known historically as Nikanisk by the Mi'kmaq, is a picturesque coastal area consisting of Ingonish, Ingonish Centre, Ingonish Beach, Ingonish Harbour¹⁷ and Ingonish Ferry. The area is in Victoria County on the Cabot Trail, approximately 94 km north of Baddeck. According to the Canadian Encyclopedia, the origin of the Ingonish name may be Portuguese, named by fishermen who wintered here as early as 1521. The Portuguese settlement was destroyed in conflicts with the Mi'kmaq and French, who, in the 1600s, operated Port d'Orléans, a thriving fortified centre producing prized salt cod.



Today, Ingonish provides natural and built culture, heritage, outdoor recreation sites, attractions, and tourist facilities. Visitors experience primary attractions like Cape Breton Highlands National Park and the Cabot Trail, Ingonish Beach, Cape Smokey, the Keltic Lodge Resort, and Highlands Links Golf Course, one of the top 100 golf courses in the world.



The people who call Ingonish home are proud and passionate. They take great pride in their community and the many assets that attract visitors worldwide. Many residents were born and raised in the Ingonish area. Others discovered the area's rich beauty and natural wonders and have relocated to start a new life in retirement. Whether these individuals live, work, or play in the area, they are anxious to see responsible and collaborative tourism development unfold over the next three years.

¹⁷ Photo by Wallace MacAskill/Nova Scotia Archives. The Canadian Encyclopedia © 2024.

Throughout the planning process, five overarching Findings and Observations were identified that frame the Findings and Observations.

1. **Mixed Interest in Community Tourism Development** – While the region has a rich history of welcoming visitors, mixed interest was evident at the outset of the development process.

Many, but not all, tourism operators were very interested in embracing responsible tourism development to ensure their community's healthy future for their families and to help rebuild their tourism operations post-pandemic. However, other operators chose not to participate in the tourism development planning process, perhaps saying they were satisfied with current business levels or too busy to get involved.

Citizens, especially those born and raised in the community and witnessing a decline in healthy lifestyle attributes, embraced any development to preserve future prosperity. However, other citizens were fearful and apprehensive, wanting to protect their current way of life; several examples of over-tourism in other communities were used to substantiate those fears.

The municipal council encouraged and supported responsible tourism development, recognizing the need to bolster the local economy to ensure a sustainable tax base to cover current operations and future community service and infrastructure requirements.

Additionally, significant investments have been and will continue to be made among public and private-sector tourism businesses, suggesting great interest in seeing Ingonish flourish into the future. These include Parks Canada/Cape Breton Highlands National Park, Cape Smokey, GolfNorth Properties/Keltic Lodge/Highland Links Golf Course, Groovy Goat, Bitsy Bean Café, and others.

Finally, a consensus was reached on accommodating all through responsible tourism development, respecting and sharing our unique place, and implementing regenerative tourism practices in all development initiatives.

2. **Preserve the Place We Call Home** – During the consultation process, overwhelming agreement was expressed that embraced this concept, including the notion that:

“A Great Place to Live Is a Great Place to Visit”

While new to some, the notion of putting the planet and people first through responsible and “regenerative” tourism development was soundly endorsed. Most everyone recognizes that a thriving, regenerative tourism ecosystem produces net benefits for the community and businesses and agrees with Destination Canada’s view that tourism is a community-builder, job generator, and potential path to reconciliation.

Regenerative tourism development builds people's capability to engage in a continuous and healthy relationship with the place where they live. There is constant learning and feedback so that all aspects of the system (natural, cultural, and economic) are an integral part of life in this place – co-evolution.

3. **Ingonish Vision and the Visitor Journey** – Consensus was reached regarding the elements of an Ingonish vision. The vision and visitor journey maintain that Ingonish has the following core attributes:

- Connections, relaxation, rejuvenation, appreciation, joy.
- Warm and welcoming people.

- A tapestry of natural beauty, breathtaking landscapes, and a unique, well-paced way of life.
 - Places of discovery with a rich culture, art and heritage, music and events, fresh seafood, and exhilarating outdoor adventure opportunities.
4. **Four-season Outdoor Recreation, Heritage, Arts, and Culture are the Core Tourism Assets** – These anchor assets feature Cape Breton Highlands National Park (CBNP) and the Cabot Trail, Cape Smokey, Highland Links Golf Course, and the North Highlands Community Museum.

Most four-season outdoor recreation pursuits involve land and water-based activities, such as cycling, hiking, snowshoeing, downhill and cross-country skiing, snowmobiling/ATV, paddling, guided tours, whale watching, and golf.

Cape Breton is built on a rich Mi'kmaw heritage, which is illustrated, at present, through several interpretive learning opportunities delivered by CBHNP. The North Highlands Museum and Culture Centre is home to much of the area's recent past. The Ingonish Arts & Culture Society also offers many arts, culture, and heritage activities, conversations, and programs. The community's Gaelic heritage is also a factor in the story, as evidenced by the wayfinding signage throughout the region that features the Gaelic language. There is also a calendar of heritage, culture, and arts events, including the world-famous Celtic Colours International Festival, the annual INGObeach Pride Festival celebrations, and Hike the Highlands Festival.

5. **“Linger Longer” is the Underlying Positioning** – Enhancements to infrastructure, visitor services and experiences are required to attain this positioning successfully.

The official Cabot Trail tourism map says the entire Cabot Trail drive takes approximately five hours to drive, which, one could argue, reinforces a notion that visitors can “Do the Trail” in a relatively short length of time. This thinking undermines the visitor’s journey, which could include opportunities for interactive experiences and adventures beyond taking pictures of spectacular vistas and landscapes. In addition, when visitors take this approach at the planning stage before they leave home, it eliminates the possibility of an overnight stay, reducing the economic impact of the visit to Cape Breton.

Specific Findings and Observations

Digital Footprint Analysis – As part of the development process, online assessment specialists White Punt Consulting completed a comprehensive analysis. Their detailed report presents the specific results of their study and a series of considerations, which have been included in the recommendations and action section of the strategy.

A high-level summary of the White Punt findings is as follows:

- Provincial tourism website (novascotia.com): To fully leverage the provincial platform, which has a great deal of general information about Ingonish, there's an opportunity to create more Ingonish-specific travel packages, experiences, events, and festivals that can be posted on the site free of charge (they must meet guidelines) to stimulate a visit (TNS has programs to help operators develop purchasable experiences and packages).

- Destination Cape Breton Website (cbisland.com) The DCB site is a comprehensive resource and could be the go-to site for prospective Cape Breton Island visitors. Presented and themed seasonally, it provides a detailed overview of almost everything to see and do and listings for the island's tourism businesses.
- Victoria County website (victoriacounty.com/visitors/) The municipal website has a substantial list of trip motivators under "Suggested Experiences." Still, there are more things to see and do in the county, and therefore, while providing basic information, it lacks detailed trip planning information.
- Ingonish Development Society website (experienceIngonish.com) The IDS site uses Ingonish - Nature's Home as a theme and lists things to do along with blog posts that could relate to visitors; however, the site is thin on details, especially for visitors during the trip planning window.
- Ingonish Arts & Culture Society (IACS) website (ingonishartsandculture.ca) The IACS site features limited information with little content related to activities and events specific to this sector. The site does provide good coverage of the Dories and Stories experience program. Still, it appears to not be up to date with helpful and relevant information for potential visitors.
- Individual tourism operator websites.
 - Lead tourism operators have websites that provide potential visitors with helpful information to plan a trip, including purchase/reservation options (accommodation bookings, lift ticket sales, tee time reservations, attraction/tour bookings, etc.
 - Secondary tourism operators are generally ok; however, most sites reviewed lack specific information to help potential visitors fully plan a visit. More specifically, they lack compelling visuals, few use video, and most don't ask for the sale by providing a mechanism to make a reservation, book an experience or secure a purchase.
- There is little culinary or food and beverage information on all websites.
- It is apparent significant work needs to be done to consolidate the proliferation of websites that provide potential visitors with helpful information when they are in the planning stage of a possible trip or when they are in the community on a trip – at present, visitors may get confused when it comes to relying on a specific site and information related to Ingonish.
- By working together, Tourism Nova Scotia, Destination Cape Breton, Victoria County, and the Development Society can perhaps consolidate visitor sites, align messaging, and clearly state the area's most essential trip motivators, featured themes and assets.
- Effectively taking the potential visitor successfully down a path to purchase can be the goal of future revisions to the Ingonish online presence.

Emerging Themes – Two Ingonish tourism themes became apparent throughout the discovery phase of the development process. When leveraged, these themes represent opportunities to differentiate Ingonish from other communities and regions in Cape Breton, Nova Scotia, and Atlantic Canada.

The themes are supported by existing and future visitor touch points, representing attractive opportunities for visitors to plan an extended visit to the Ingonish area.



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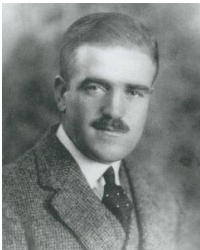
Four-Season Outdoor Adventure – Visitor Touch Points:

- Land and water-based activities, including the Cabot Trail, CBHNP, Cape Smokey, Cape Breton Highland Links Golf Course, picturesque coastlines, hiking and cycling trails, snowshoeing, downhill and cross-country skiing, golf, paddling, whale-watching tours, snowmobiling, and ATV trails
- The announcement of the development of the Sea Wall Trail has the potential to become one of North America’s iconic wilderness trails. “The province is investing \$6.4 million in the design and construction of the nearly 50-kilometre Seawall Trail, including huts and bridges, as well as marketing, communications and engagement with local Mi’kmaw communities in the traditional district of Unama’kik (Cape Breton).”¹⁸ The trail, when complete, will help position Cape Breton and, more importantly, Ingonish as a beautiful place to hike. Even if hikers do not take on the challenge of the Seawall Trail, they’ll learn other notable hikes within CBNP and the Ingonish area, including options for multi-day and shorter wilderness hikes, cross-country skiing and snowshoeing.
- Discover Cape Smokey Four Season Resort, known for its excellent downhill skiing, snowboarding, guided hiking, and paddling experiences (kayak rentals are available). In terms of the future, Cape Smokey has embarked on a robust site expansion plan that includes enhanced year-round visitor experiences and activities, roofed commercial accommodation, and retail and restaurant options in Cape Smokey Village.

Arts, Culture, Heritage – Visitor Touch Points:

- Mi’kmaw culture, Gaelic culture, fishing culture, the North Highlands Museum and Culture Centre, local artisan’s studios and shops, musicians who perform nightly at the Keltic Lodge, Cape Smokey (scheduled) and festivals and events, a long list of existing events and festivals, the iconic Keltic Lodge and its storied past.
- The historic Cape Breton Highlands Links golf course was designed by renowned golf course architect Stanley Thompson (1939 – 1941). The National Park Service (now Parks Canada) hired

Stanley Thompson to design and build what he called “the mountains and ocean” course. Much of the course was clear land, and much of the growth of the surrounding vegetation has come since. The result is an inspired piece of architecture that has proved to be one of Thompson’s finest design achievements.¹⁹



¹⁸ The Seawall Trail Society. <https://www.seawalltrail.com/post/seawall-trail-funding-annoucement>

¹⁹ Cape Breton Highland Links Golf Course. <https://golfcapebretonhighlands.ca/history/>

- Other attributes contribute to the Arts, Culture Heritage theme, including:
 - Land and sea stages for experiences and storytelling.
 - Mi'kmaw culture, as articulated through interpretive programming delivered by Parks Canada staff.
 - The Dories and Stories experience (pictured below)²⁰ delivered by the Arts & Culture Society in partnership with Parks Canada.



- The Ingonish Arts & Culture Society, whose stated mandate is as follows:

As a community-based Not-for-Profit Society, the mission of the Ingonish Arts and Cultural Society is to promote and preserve the artistic and cultural heritage of the Ingonish area by providing educational and engaging opportunities for community members of all ages to participate in and experience the arts, fostering creativity, and building a vibrant and inclusive community. We strive to create a platform for local artists to showcase their talents and to provide cultural events and activities for the community to enjoy throughout the year.²¹

Annual Events Reinforce the Themes and Position Destination – Existing and past annual events can help position Ingonish in the context of its unique narrative and themes and simultaneously stimulate year-round visitation. Past events not currently being held can be resurrected if they meet positioning and off-season business-building criteria. Existing events may have the potential to expand beyond a day or weekend.

Events include, but are not limited to:

- Hike the Highlands (pictured)
- Ingo Beach PRIDE (pictured)
- Celtic Colours International Festival (pictured)
- Huckle Buckle Festival
- Food Truck Rally



Ingonish Positioning—Several logos and accompanying positioning lines represent Cape Breton and Ingonish, specifically in the market. These logos may or may not provide the most desirable positioning for the destination in a tourism context and, therefore, may create confusion in potential visitors' minds.

²⁰ Ingonish Arts & Culture Society. <https://ingonishartsandculture.ca/dories-stories/>

²¹ Ingonish Arts & Culture Society. <https://ingonishartsandculture.ca/>

Cape Breton Island's overarching positioning is that *your heart will never leave*. This positioning is not inconsistent with how Ingonish may want to be perceived by potential visitors and, therefore, does not present any apparent confusion. In addition, Cape Breton Island has notoriety, as evidenced by the sound endorsement it received from Cone Nast Traveller, a leading U.S.-based travel media outlet and publication.



However, the other logos and positioning more specific to Ingonish may confuse, as illustrated in the logos and taglines below:



Wayfinding and Visitor Signage – There is a deficit in wayfinding signage in and around Ingonish. The signage outside CBHNP shows wear; some signs are unreadable or overgrown with foliage. Others lack clarity in directing visitors to where they want to go. For example,



visitors may be confused about whether they are on the Cabot Trail or in or outside Cape Breton Highlands National Park.



CBHNP signage, on the other hand, is excellent and provides clear directions to trails, campgrounds, beaches, and other park attractions.



The lead tourism operators in the community have attractive signage that directs visitors to their businesses. For example, Cape Smokey has an elaborate signage program that provides clear directional signage along the route. They also have fun with some of their directional signage.



Keltic Lodge also has good signage that directs and welcomes guests to its property.



Golf North/Keltic Lodge and Parks Canada Challenges – On April 3, 2024, the following information concerning the current situation at the Keltic Lodge was communicated by Golf North:

“GolfNorth, jointly with Parks Canada, has made the difficult decision to close the Keltic Main Lodge and several of the cottages in Ingonish, Nova Scotia. Despite substantial GolfNorth investment, the condition of the aging Main Lodge and cottages has proven to be a challenge. A significant investment in the range of tens of millions of dollars would be required to comply with minimum current standards and codes, including electrical, heating, air conditioning and accessibility, and to maintain the high-quality experience visitors have come to expect. Additionally, Parks Canada is slated to restore and realign the Keltic Road and associated underground infrastructure starting in the fall of 2024.

Parks Canada and GolfNorth are keenly aware of the historical, cultural, and local community significance of the Keltic Lodge and Middle Head Peninsula. Parks Canada is currently confirming the building’s heritage values through the Federal Heritage Buildings Review Office guidelines. This review will capture and document the historical and cultural value of the building and its surroundings, and this information will be used to inform decisions regarding the future of the building and the recognition of its history. Working together, Parks Canada and GolfNorth are developing a long-term plan for the entire peninsula with a focus on a sustainable tourism offer. Both organizations are committed to the revitalization of the property and engaging Canadians in this process to ensure this cherished destination continues to thrive and evolve for generations to come. Stay tuned for updates in due course.”²²

As the release states, the Keltic Lodge and Middle Head Peninsula have historical, cultural, and local community significance and positively impact the local economy and workforce. The future success of Ingonish and its tourism sector relies heavily on the services, features, and benefits the Keltic Lodge brings to the community and the travelling public.

²² Keltic Lodge website (edited for brevity). https://kelticlodge.ca/closure-of-keltic-main-lodge-and-cottages/?utm_source=Keltic+Lodge+%2B+CBHL&utm_campaign=d5559729d1-EMAIL_CAMPAIGN_2024-04-03-KL&utm_medium=email&utm_term=0_a9d77b0792-d5559729d1-349947517&mc_cid=d5559729d1&mc_eid=02adc56da3

In addition, investments in services and infrastructure made by others within the community, especially by Cape Smokey, will only be entirely beneficial when Parks Canada and Golf North complete the needed work on the lodge, cottages, and Keltic In Road.

The future success of Ingonish is dependent on a fully operational and competitive Keltic Lodge.

Development Imperatives – To successfully respond to these overarching Findings and Observations and the Emerging Themes, several Strategy Imperatives were identified to fulfill and implement the identified recommendations and actions. These include:

- Victoria County facilitates strategy implementation in partnership with the IDS.
 - Work needs to be done immediately following the approval of the strategy to clarify roles and responsibilities for plan implementation.
- Identify resource gaps for plan implantation and take steps to fill gaps through dialogue with government and tourism partners.
- ACOA/Tourism Atlantic will take proactive steps to ensure plan implementation is realized.
- Destination Cape Breton, in partnership with Tourism Nova Scotia, is proactive in supporting Ingonish destination development.
- Destination Cape Breton, in partnership with Tourism Nova Scotia, leads IDS and Victoria County marketing efforts.
 - Both organizations have already expressed a willingness to support this activity.
 - Both organizations have dedicated resources to facilitate strategic marketing initiatives.
- Partnership expectations and parameters will need to be clearly defined immediately following the approval of the strategy.
- Identified local lead partners (Cape Smokey, Keltic Lodge, CBHNP) will support community-wide success by collaborating on the recommendations and actions detailed in the plan.
 - Other tourism and community stakeholders embrace the identified recommendations and actions and support collaborative community-based tourism development.

Recommendations and Action Plan

The 2024 – 2026 Tourism Strategy's recommendations and actions are based on findings and observations revealed through the discovery consultation sessions, key informant interviews, working group input, current/future market dynamics, and the realities of a redefined tourism landscape.

The Working Group, county staff, members of the IDS, and the community and tourism sector stakeholders have validated and prioritized the Recommendations and Actions, which are believed to be achievable over the next three years. To do so will require sufficient staff resources and buy-in, determination, commitment, and focus from a broad base of stakeholders in and outside the tourism sector in Ingonish. This includes citizens, business operators, community groups, and governments.

The IDS also wanted to identify actions that would positively and immediately impact the tourism landscape in Ingonish. Those actions include activities that will be addressed as soon as possible and others that align with activities already in play. These actions are identified with a ★ symbol.

Role Legend: IDS – Ingonish Development Society, VC – Victoria County, OP=Tourism Operators, RES - Residents, IACS – Ingonish Arts and Culture Society, DCB – Destination Cape Breton, CBP – Cape Breton Partnership, PC – Cape Breton Highlands National Park, TNS – Tourism Nova Scotia, CS – Cape Smokey, TCOA – Tourism Atlantic/Atlantic Canada Opportunities Agency.

Recommendations	Actions	Role	Timing
<p>1. <i>Secure broad-based endorsement of the tourism strategy throughout the Ingonish area, reinforcing the underlying theme:</i></p> <p><i>“A great place to live is a great place to visit.”</i></p> <ul style="list-style-type: none"> Take proactive steps to communicate, inform, and engage a broad base of individuals on the specifics of the STEP. Underpin development goals and actions by reinforcing tourism’s benefits and importance to the community’s future viability. 	<ul style="list-style-type: none"> IDS leads all communications with facilitation and support from Victoria County tourism staff. 	IDS VC	Sept 24
	<ul style="list-style-type: none"> IDS and Victoria County have a dedicated STEP Implementation Progress page on their websites for all to see. 	IDS VC	Sept
	<ul style="list-style-type: none"> Utilize IDS, County, and other social media to extend the reach of strategy implementation details. 	IDS VC	Sept
	<ul style="list-style-type: none"> STEP community launch sessions: Rally support by holding a public strategy session to introduce the STEP Recommendations and Action Plan. <ul style="list-style-type: none"> Provide opportunities for attendees to sign up for specific tasks related to plan implementation (e.g., experience provider, GIVE BACK vendor, subcommittee member, etc.). Identify and enlist community champions to be spokespersons for the strategy. 	IDS VC	Oct
	<ul style="list-style-type: none"> Identify a community GIVE BACK project 	IDS	Oct

	<p>where visitors are invited to support a local social or community initiative – tourism. Proceeds could support:</p> <ul style="list-style-type: none"> ○ North of Smokey Food Bank, Senior Housing, Cop’s Cove Tourism Hub, etc. ● Create a bi-monthly stakeholder/partner e-newsletter to keep constituents up to date on tourism-related actions and activities. 	VC IDS	Jan 25
2. Clarify roles and responsibilities for the implementation of the plan.	<ul style="list-style-type: none"> ● Victoria County, IDS and DCB to determine roles and responsibilities. <ul style="list-style-type: none"> ○ VC takes the lead on these discussions (including DCB CBP, PC, Cape Smokey, and Keltic Lodge) ● Identify VC staff lead to facilitate initial strategy implementation. <ul style="list-style-type: none"> ○ Identify what ongoing resources are required (\$\$\$ and HR) to ensure STEP implementation. ● Establish a sustainable funding model to support development initiatives through 2027. 	VC IDS DCB VC IDS DCB ACOA VC IDS DCB	Sept 24 Sept Jan 25
3. Foster the creation of new legendary visitor experiences through connections with local people	<ul style="list-style-type: none"> ● Inventory existing visitor experiences where high-value guests can purchase and experience compelling articulations of the featured themes. <ul style="list-style-type: none"> ○ Ensure these experiences are featured on the DCB, IDS, VC, and TNS websites, social media channels and other promotional vehicles. ● Identify gaps in four-season on-theme, curated, purchasable experiences. Gaps identify where the creation of new visitor experiences is needed—opportunities for high-value guests to purchase compelling experiences to attract them to the community for extended stays at times of the year when there is capacity (non-peak season). ● Mobilize residents and access the wealth of local knowledge and skills that is present. <ul style="list-style-type: none"> ○ Issue a Call for Experience Providers who develop experience concepts and ideas and submit them for implementation consideration. ○ Allocate budget for experience providers' development expenses, 	VC VC IDS RES	Feb 25 Feb
<ul style="list-style-type: none"> ● Facilitate planning sessions and skills mapping to understand passions, interests, skills, and talents, which could be developed into authentic visitor experiences. ● Take proactive steps to leverage the power of the themes (Four Season Outdoor Recreation and Heritage, Culture, Arts) by developing purchasable, curated, visitor-friendly tourism experiences. ● This is a four-step process: 			

<ul style="list-style-type: none"> 1. Optimize the potential of existing theme-related experiences through enhancement and partner promotion (DCB, TNS). 2. Fill gaps in themed experiences using them as four-season destination attractors. 3. Recruit, train, and empower a network of theme-related experience providers (residents). 4. Provide seed funding to help individuals get their experiences to market. 	<p>such as loaner binoculars for a birding experience (Victoria County Development Capital Fund, VC/North Highlands Community Museum ★ Experiential Development program)</p> <ul style="list-style-type: none"> ○ Undertake a community Skills Mapping process – see Asset Based Community Development tools. • Tap into the skills of DCB, TNS, and PC staff to help facilitate learning opportunities for potential Ingonish experience providers. • New year-round experiences must embrace regenerative tourism principles. They must enhance local economies using local products and services, be frictionless, minimize carbon footprint on the landscape, present the cultures and traditions of host communities through connections with local people, be inclusive and welcoming to all, consider visitor needs, and restore ecosystems and community infrastructure. • Organize a best practice mission to Wolfville, NS, to meet with organizers and participants in the FoodArtNature program; use their experience to encourage potential Ingonish individuals to create their own visitor experiences. 	<p>VC, DCB, TNS, OP RES</p> <p>VC IDS</p>	<p>March</p> <p>April</p>
<p>4. Use existing events to stimulate overnight visitation in Fall and Winter.</p>	<ul style="list-style-type: none"> • Leveraged the planned Cape Smokey Race Team-sanctioned Alpine Ski Race. ★ The event includes: <ul style="list-style-type: none"> ○ Participants - Youth 7-18 years of age ○ Training camp weekend in Dec 2024, with the race weekend scheduled for early January 2025 ○ Partner with Ski Ben Eoin and their race, which takes place the week before with the same participants. • Prioritize the development of events that are “on-theme” to attract locals and visitors. <ul style="list-style-type: none"> ○ Leverage DCB Shoulder/Winter Event Incubator, \$25,000 x 3 years ★ ○ Create Event Accommodation Packages with an F&B component. ○ Offer supporting experiences to guests to supplement event activity. ○ DCB and TNS take event packages to market. 	<p>CS IDS VC</p> <p>IDS VC DCB TNS</p>	<p>Sept 24</p> <p>May 25</p>

	<ul style="list-style-type: none"> ○ Build a GIVE BACK component to support the community project (see Recommendation #1) ○ Grow the length of specific events from one day to two, three days to four, or back-to-back weekends to fully leverage efforts to stage the event and encourage extended guest stays. ● Identify event gaps in the annual calendar of activities, then consider developing a new event using the Shoulder Season/Winter DCB Incubator Fund. ★ 	VC	May 25
<p>5. Ensure the “Linger Longer” proposition drives development and promotional activity*.</p> <p>*Not necessarily more visitors but visitors who spend more time in the region.</p>	<ul style="list-style-type: none"> ● Dispel the “Do the Trail” positioning and reinforce everything to experience in the area <u>when potential visitors are in the trip planning phase</u> (online). ● Create year-round multi-day itineraries designed around visitor segments and our themes. <ul style="list-style-type: none"> ○ Prioritize itineraries to stimulate business in June, September and October when there are accommodation options with capacity. ● Equip front-line staff with timely “Things to See and Do” info they can share with customers. ● Identify and develop the Ingonish community hub at Cop’s Cove - the hub becomes the community gathering, celebration, and meeting place, supporting visitor services and infrastructure. <ul style="list-style-type: none"> ○ IDS already has a License to Occupy from Parks Canada. ★ 	IDS VC DCB TNS VC DCB VC IDS IDS VC PC	April 25 April April Sept
<p>6. Take proactive steps to maximize the community's online presence, utilizing the learning from the Digital Footprint Analysis.</p>	<ul style="list-style-type: none"> ● The TNS website (novascotia.com) is the primary link for “from away” visitors considering a trip to the province. Therefore, DCB, IDS, VC, and lead operators (Keltic Lodge, Cape Smokey, Parks Canada) must ensure that TNS has relevant Ingonish content for visitors in the trip-planning phase. ● The DCB website (cbisland.com) is the go-to site for prospective visitors considering a trip to Cape Breton. Therefore, consolidating other Ingonish websites (Victoria County, IDS, Ingonish Arts, Culture Society) is needed to 	DCB VC TNS DCB VC IDS IACS OP	Feb 25 March

	<p>reduce redundancy and streamline the path to purchase for potential visitors planning a trip to Cape Breton Island.</p> <ul style="list-style-type: none"> • Work with DCB to complete this consolidation utilizing DCBs new Listing System and the newly created DCB/VC Content Hub ★ • Implement capacity-building/training sessions for operators to enhance their websites and social media presence, utilizing training expertise from DCB and TNS. • Develop and feature more Ingonish travel packages and experiences on novascotia.com; the free listings can be developed in partnership with TNS guidance. 	<p>VC DCB</p> <p>DCB TNS VC</p> <p>DCB VC OP</p>	<p>March</p> <p>April</p> <p>April</p>
<p>7. Ground tourism development in regenerative tourism practices.</p> <p>Throughout the planning process, there was consensus that the strategy should embrace regenerative tourism principles. Ongoing dialogue is required to support a greater understanding that turns knowledge into action. A regenerative approach to tourism development involves several elements:</p> <ol style="list-style-type: none"> 1. Connecting people and their place in a deep, purposeful, and meaningful relationship. 2. Putting that shared purpose into action by developing hosting experiences and infrastructure enlivened by local stories, learning, and care. 3. Working in a manner that grows capacity for flourishing and resilience among people, businesses, communities, and ecologies. 	<ul style="list-style-type: none"> • All development efforts must be guided by an equal focus on economics and the well-being of Ingonish people and places to measure future tourism sector success. • Ingonish businesses become certified sustainable – explore programs offered by GMIST and others as DCB develops a Sustainable Tourism Program/Plan. ★ <ul style="list-style-type: none"> ○ As a priority – set a goal for the number of Ingonish businesses that become certified sustainable. • Reinforce the need to source locally – set up a community-centric buying directory or platform to help operators identify and source local goods and services. • Identify and communicate our community expectations and standards to create meaningful connections in safe and supportive settings for all; for example, DCB has subscribed to the Rainbow Registered program and is encouraging businesses to register to become participating members. ★ • DCB is also creating a program to ensure compliance with accessibility standards at all businesses. • Send Ingonish delegates, through a co-funded program, to annual Impact Conferences in communities nationwide. • Following Parks Canada's lead, take steps to protect the environment through regenerative development and business operations. For example, consider 	<p>IDS VC</p> <p>DCB VC IDS OP</p> <p>IDS VC OP</p> <p>IDS VC</p> <p>DCB VC IDS IDS</p> <p>IDS VC</p>	<p>April 25</p> <p>Sept</p> <p>Oct</p> <p>Nov</p> <p>Nov</p> <p>Nov</p> <p>Jan 26</p>

	<p>encouraging operators to reduce/eliminate the use of single-use plastics.</p> <ul style="list-style-type: none"> Consider developing and adopting an Ingonish Regenerative Tourism Vision, for example: <i>Ingonish is a community of citizens and visitors committed to embracing regenerative tourism practices that leave our unique and beautiful place with a healthier environment, a happier community, and a more robust hosting economy.</i> (Adapted from Canmore, Alberta's Regenerative Tourism Framework) 	IDS	April 26
<p>8. Identify and, where possible, address service and infrastructure gaps in collaboration with others.</p> <p>Address infrastructure and service gaps that are detrimental to the visitor journey. This includes, but is not limited to:</p> <ul style="list-style-type: none"> Ongoing infrastructure challenges and gaps at Keltic Lodge, for example, the current condition of the main lodge (currently closed due to safety concerns), the condition of the access road to the main lodge due to erosion issues Frequency cost of air access to Sydney Poor road conditions throughout the area Poor broadband/cell connectivity throughout the area Wayfinding signage throughout the region – quality, frequency, etc. (outside of CBHNP) EV charging stations Consistent business operating hours, especially food and 	<ul style="list-style-type: none"> Prioritize the extended infrastructure and service gaps and identify specific actions and accountabilities to address the most pressing issues. <ul style="list-style-type: none"> Work with government, industry and private sector partners to identify lead entities to address gaps Work with industry to address service, hours of operation gaps, as well as F&B options and availability Lend support to the ongoing discussions between Parks Canada and Golf North/Keltic Lodge regarding critical infrastructure gaps. A fully functional operation at Keltic Lodge is vital to Ingonish's future success. Take necessary steps to ensure a sustainable workforce through dialogue and partnership with operators, DCB and TIANS. Continue to address affordable hospitality staff housing shortages. <ul style="list-style-type: none"> Ensure the DCB/VC Housing project becomes a reality (awaiting confirmation of government funding). ★ Once built, take steps to transfer management and operations to a community group like the IDS. Continue to lobby for removing seasonal business tax incentives (Bill 191), which is counterintuitive to extend the season. 	IDS VC DCB ACOA TNS CBP OP IDS VC DCB PC Keltic VC DCB TIANS VC DCB VC DCB TIANS	Sept 25 ASAP Ongoing Ongoing Ongoing ASAP

<p>beverage operations</p> <ul style="list-style-type: none">• Enhanced food and beverage outlets and options• Workforce development and labour shortages, including affordable housing for hospitality workers• Consistent service standards at all tourism operations			
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Appendix 1 – Working Committee

We acknowledge the work of this group of individuals who provided insight, guidance, and validation of the Ingonish STEP strategy.

- Ryan Costelo, Chair (Groovy Goat)
- Dan Coffin (Victoria County)
- Colleen Whelan-Smith (Victoria County)
- Ken Donovan (citizen)
- Terry Smith (DCB)
- Jo-Lanna Murray (DCB)
- Andrea Gray (TNS)
- Cathy MacKenzie (ACOA)
- Martin Kejvel (Cape Smokey)
- Larry Dauphinee (Victoria County Council)
- Kinnon MacKinnon (citizen)
- Ruth Shore (citizen)
- Stan Symes (citizen)