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CAPE BRETON ISLAND WINTER PRODUCT SITUATION ANALYSIS, INVENTORY and OPPORTUNITIES ASSESSMENT

Prepared for

DCBA
Destination Cape Breton Association

by
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CONTENTS

Executive Summary………… iv

1. Introduction………… 1
2. Purpose and Objectives………… 1
3. Approach ………… 2
4. Winter Product Situation Analysis………… 2
   - 4.1 Atlantic Canada Winter Tourism and Activities………… 2
   - 4.2 Nova Scotia Winter Product………… 3
   - 4.3 New Brunswick Winter Product………… 8
   - 4.4 Newfoundland and Labrador………… 9
   - 4.5 Prince Edward Island………… 11
5. Market Readiness Criteria………… 12
6. CBI Winter Tourism Product/Experience Inventory………… 14
   - 6.1 CBI Winter Accommodations………… 14
   - 6.2 Food & Beverage Establishments/Restaurants………… 17
   - 6.3 Outdoor Activities………… 19
     - 6.3.1 Non-motorized Activities………… 19
     - 6.3.2 Motorized Activities………… 22
   - 6.4 Art Galleries, Artisans, Shops………… 26
   - 6.5 Attractions/Ongoing Events………… 26
7. Opportunity Assessment………… 27
8. Recommendations………… 29
9. Conclusion………… 31

LIST of FIGURES and TABLES

Figure 1: 2015 Occupancy Rates for nova Scotia and Cape Breton.................................... 5
Table 1: Atlantic Canadian Participation in Non-Motorized Winter Activities................. 3
Table 2: Nova Scotia Winter Visitor Profile………………………………………………………………… 4
Table 3: Nova Scotia Resident Snowmobiler Profile………………………………………………….. 7
Table 4: New Brunswick's Major Downhill Ski Slopes………………………………………………… 8
Table 5: Winter Activities/Experiences Highlighted under "Things to Do" on the NL Website………………………………………………………………….. 9
Table 6: Proposed Visitor Ready Criteria……………………………………………………………….. 13
Table 7: CBI Accommodations Open During Winter 2016…………………………………………. 15
Table 8: Food and Beverage Establishments Open During Winter 2016………………………. 17
Table 9: CBI Snowshoe and Cross-Country Ski Aras & Rentals…………………………………. 20
Table 10: Snowmobile Clubs and Related Offerings on CBI………………………………………. 23
Table 11: ATV Clubs on CBI……………………………………………………………………………………. 25
Table 12: CBI Art Galleries, Artisans and Shops on CBI……………………………………………… 25
Table 13: Attractions/Ongoing Events Open During Winter 2016…………………………………. 26

APPENDIXES

A. Appendix A: Provincial, Municipal and Stakeholder Consultation List..................... 32
B. Market Readiness Definitions Across Canada……………………………………………………. 33

EXECUTIVE SUMMARY

CAPE BRETON ISLAND WINTER PRODUCT SITUATION ANALYSIS, INVENTORY and OPPORTUNITIES ASSESSMENT

INTRODUCTION

As part of strengthening and extending CBI's products/experiences, the Destination Cape Breton Association (DCBA) wishes to understand the feasibility of developing winter tourism. The report provides DCBA with a better understanding of the current winter tourism product marketplace, products available, and potential to grow winter tourism.

PURPOSE and OBJECTIVES

The purpose of the project was to assess the development potential (feasibility) of developing the winter tourism product on Cape Breton, Island, and to provide a go forward strategy. Specific objectives of the project were to:

1. Provide a situation analysis of winter tourism for Atlantic Canada/Nova Scotia/Cape Breton;
2. Develop market-ready criteria for winter products/experiences;
3. Develop an inventory of the Cape Breton Island winter tourism product and assess levels of market readiness;[1]
4. Provide an opportunities assessment of winter product opportunities, (establishing) the potential for developing winter tourism.
5. Specify go forward recommendations on next steps.

APPROACH

Several methods were used to fulfill the objectives noted above:

- Research review: on Atlantic Canada winter tourism environmental scan, market readiness criteria, winter tourism reports and analyses;
- Web-based Review: of a) market readiness criteria, and b) individual operator websites;
- Interviews: with many Cape Breton Island operators, provincial/municipal tourism representatives and other tourism stakeholders;
- E-mail Contact and Telephone Follow-up: with operators in the inventory listing.

SITUATION ANALYSIS

Atlantic Canada is home to 5.3 million people. About 45% participate in non-motorized activities (skating, snowshoeing, downhill skiing, cross-country skiing), but not necessarily while traveling.

[1] The original objective was to identify which products/experiences are market ready. This task proved to be difficult without visiting operators. Potential winter product market readiness is provided with an associated recommendation.

In **Nova Scotia**, winter travelers represent approximately 12% of Nova Scotia's non-resident pleasure visitors. Only 5% of winter travelers stopped or stayed on Cape Breton Island (CBI). The province has defined and profiled winter travelers. Winter travelers represent a low yield market segment. Many non-motorized activities are trail-based and market readiness inroads have been made by Hiking Nova Scotia. In terms of motorized activities, there are about 7,500 resident snowmobiles in Nova Scotia with annual expenditures on outings of $23.7 million. There are about 35,281 ATV riders who spend $42.1 million on outings during 2015.

New Brunswick has a relatively strong winter product, predominantly located in the northern part of the province. There is no explicit winter strategy per se promotions emphasize the "most snow" in the Maritimes, great snowmobiling and downhill skiing. Indoor activity options are also featured under "winter" on the website. There are more than 20,000 snowmobile users in New Brunswick, with an industry valued at $25 million. 36,000 ATV users were estimated to spend $12.2 million in 2010 (most recent figures).

Prince Edward Island (PEI) does not focus on winter, nor does it target the winter visitor so there is little in the way of winter tourism product. Most activities, festivals and events are aimed at resident.

MARKET READINESS CRITERIA

A definition for visitor readiness is proposed, along with several visitor ready criteria.

WINTER PRODUCT INVENTORY

Assuming that the total number of tourism operators on Cape Breton Island is rounded at 500, it is estimated that about 25-30% (140 approx.) are open during winter (i.e. year round). Some operators cater to residents but serve visitors when they are on the Island.

This number includes approximately:

- 70 accommodation operations, with a mix of hotels and cottages/cabins,
- 70+ food and beverage operations,
- numerous outdoor activity options, at least 2 of which are private sector operators,
- 19 art galleries, artisans, shops, and
- a handful of attractions (about 10), most of which are demand supporters, versus demand generators, as they do not motivate visits.

OPPORTUNITIES ANALYSIS

The winter travel market is relatively small. However **there are opportunities to target niche markets including resident and nearby markets seeking: getaways, x-country ski, snowshoe and hiking enthusiasts and snowmobilers.** While there is high AC participation in non-motorized winter activities – there is low participation when people travel -- unless they are coming specifically for the activity.

There is a pervading impression that most businesses are closed. Although this sentiment is to some extent borne out by the research, there are still approximately 25% of operators open for business – and not all are located in Sydney. Victoria and Inverness Counties boast several accommodations and eating establishments open during winter and there is room to support operators in various programs.

Given the reliance on and tenuous nature of the weather, experiences need to be facilitated that rely less on snow.

Snowmobiling is a niche market but the product is market ready and has potential. To a lesser extent, the ATV product may provide opportunities in the long-term.

RECOMMENDATIONS

1. Marketing: Consider a limited <u>cooperative</u> winter campaign with the key message that "*Cape Breton is open for winter business*".
2. Feature winter on the cbisland.com website "in season" (Dec- Mar).
3. Create a website search mechanism by season/date.
4. Build Winter Content on the Website.
5. Develop a Winter "App".
6. Work with Cape Breton Highlands National Park to ensure visitors know it is open.
7. Annually Update the Winter Inventory.
8. Clearly identify operators that are open for business as well as locations for equipment rentals.
9. Encourage and facilitate signature experience development by Operators
10. Develop self-guided Itineraries.
11. Consider targeting the niche snowmobile market.
12. Communities: encourage community groups to take part in winter offerings, particularly promoting equipment rental where locally available.
13. Formally adopt the proposed *visitor readiness* definition.
14. Work with ATVNS to – develop the ATV winter market in the long term.

CONCLUSON

Should Cape Breton Island promote winter tourism? The answer is yes, with a limited budget, to encourage additional business, support operators who are open and inspire others to extend the season.

1. Introduction

As home to over 500 tourism operators spread across five municipalities, Cape Breton Island (CBI) also offers opportunities for winter product experiences. While outdoor activities represent a primary travel motivator to various parts of Atlantic Canada including Cape Breton Island, many of these activities take place during peak and shoulder seasons

As part of strengthening and extending CBI's products/experiences, the Destination Cape Breton Association (DCBA) wishes to understand the feasibility of developing winter tourism for the Island. This report provides DCBA with a better understanding of the current winter tourism product marketplace, products available, and potential to grow winter tourism.

2. Purpose and Objectives

Goal - Purpose

Overall, the purpose of the project was twofold:

i. to assess the development potential (feasibility) of developing the winter tourism product on Cape Breton, Island, and
ii. to provide a go forward strategy.

Project Objectives

Specific objectives of the project were to:

1. Provide a situation analysis of winter tourism for Atlantic Canada/Nova Scotia/Cape Breton;
2. Develop market-ready criteria for winter products/experiences;
3. Develop an inventory of the Cape Breton Island winter tourism product and assess levels of market readiness;[2]
4. Provide an opportunities assessment of winter product opportunities, (establishing) the potential for developing winter tourism.
5. Specify go forward recommendations on next steps.

[2] The original objective was to identify which products/experiences are market ready. This task proved to be difficult without visiting operators. Potential winter product market readiness is provided with an associated recommendation.

3. APPROACH

Several methods were used to fulfill the objectives noted in Section 2:

- **Research review**: on Atlantic Canada winter tourism environmental scan, market readiness criteria, winter tourism reports and analyses;
- **Web-based Review**: of a) market readiness criteria, and b) individual operator websites;
- **Interviews**: with many Cape Breton Island operators, provincial/municipal tourism representatives and other tourism stakeholders (see list of those interviewed in ***Appendix A***);
- **E-mail Contact and Telephone Follow-up:** with operators in the inventory listing.

4. WINTER PRODUCT SITUATION ANALYSIS

The Situation Analysis looks at Atlantic Canada – and winter participation in outdoor activities as well as the winter product in New Brunswick (NB), Newfoundland and Labrador (NL) and Prince Edward Island (PEI).

4.1 Atlantic Canada Winter Tourism and Activities

Atlantic Canada non-resident visitation is estimated at 5.26 million in 2015, with total receipts of $4.89 billion (ACOA-Tourism Atlantic, 2016). The percentage of winter tourism visits is not known and these estimates do not include resident visitation.

Marketing outdoor winter tourism products/experiences in Atlantic Canada is challenging, in part because of the unpredictability of the weather in in part because of the Atlantic Canada market's familiarity with winter. Moreover, winter tourism does not surface as a high priority in *ACOAs Growth Strategy for Tourism: The Right Products Drive New Demand*.

With the possible exception of Northern New Brunswick, Atlantic Canada is not considered a winter tourism destination for non-residents. That being said, our main tourism market is Atlantic Canadians – even though provincial tourism departments target NEW visitors from outside the region.

Let's take a look at the **resident market:**
In terms of residents, Atlantic Canada has a population of 2.3 million. Recent data shows that about 45% (or 1.035 million) participate in outdoor **non-motorized** winter activities[3]. The majority (55%) do not participate in any winter activities suggesting increased opportunities for targeting indoor experiences. Participation by Atlantic Canadians in the most popular non-motorized winter activities is shown in ***Table 1***.

[3] Navigate, 2013, "Winter Activities", *Navigate: New Directions in Travel, Hospitality and Leisure*, V. 7, Winter, p. 8.

Table 1: Atlantic Canadian Participation in Non-Motorized Winter Activities

➢ Skating	17%	(391,000 people)
➢ Snowshoeing	11-12%	(264,500)
➢ Downhill skiing	8%	(184,000)
➢ Ice fishing	7%	(161,000)
➢ Cross-country skiing	6%	(138,000)

These figures represent the estimated market size of Atlantic Canadians participating in non-motorized winter activity. However, many of these participants do not travel to participate (or do not participate while traveling) which makes it difficult to assess the percentage of this market that can realistically be captured by Cape Breton Island.

Tourism Nova Scotia is focused on creating world-class experiences – in all products and regions, including the winter tourism product.

In attempting to build the winter product, a note on climate change is worth consideration:
As early as 2007, it was noted that:

> As *losses to regional and local economies from both extreme weather events and gradual, longer term changes in climate could be severe. At the local scale, communities that are reliant on climate-sensitive natural resources may be particularly vulnerable to climate change*.[4]

This point underlines the future need to balance outdoor **and** indoor winter experience development.

4.2 Nova Scotia Winter Product

2015 was a strong tourism year for Nova Scotia (NS); overall visitation was in to 2,069,200 up 6% over the previous year. Major markets are Atlantic Canada (54%), Ontario (23%) and Quebec (5%).[5]
Air visits were down but road visits were up substantially (9% increase, especially from Atlantic Canada, Ontario and Quebec). Travelers tend to seek getaways and things to do while visiting.

Winter travellers represent approximately 12% -- or about 250,000 -- of Nova Scotia's pleasure visitors.

[4] Intergovernmental Panel on Climate Change, 2007.
http://www.nrcan.gc.ca/environment/resources/publications/impacts-adaptation/reports/assessments/2008/ch2/10321.
[5] Tourism Nova Scotia, *Tourism Performance 2015*. https://tourismns.ca/nova-scotia-tourism-performance.

While Nova Scotia has no specific winter tourism strategy or inventory of winter-specific products, the Winter Traveller has been defined and profiled.[6] The 2015 winter traveller profile (most recent available) is shown in ***Table 2***.

Table 2: 2015 Nova Scotia Winter Visitor Profile[6]:

- 77% are from Atlantic Canada (versus 44% for all pleasure visitors).
- Have relatively short stays (3-4 days)
- Couples or lone travellers;
- Lower than average party spend ($725 versus $1,280 for all pleasure visitors).
- 43% have incomes over $80,000;
- Accommodation preferences are friends/family (51%), hotels (45%);
- Motivations for travel are friends/family, rejuvenation and doing interesting things.
- They enjoy visiting night clubs and pubs
- Participation in winter activities is low while traveling (downhill & cross-country skiing, snowboarding and snowmobiling), with only 1-2% participating while traveling.

Winter travellers Defined
(Tourism Nova Scotia, 2015)
Include pleasure visitors who travelled from December through March, excluding visitors who travelled here to attend a festival, special or public events, music concert or sporting event (these visitors are represented by the Festival and event segment and travel is determined by the festival or event).

Only 5% of winter travellers (about 12,500) stopped or stayed on Cape Breton Island (4% stayed overnight).[6]

From targeting perspective, the winter traveler market tends to be low in relative numbers and yield, thus has not been a high priority for Tourism Nova Scotia. The Province is not at capacity in peak season, which is the focus for most tourism operators. Seasonal trends are reflected in annual occupancy rates. Occupancy rates for both NS and Cape Breton Island are shown in **Figure 1**. CBI occupancy rates range from 30% in December to about 25-25% in January and February.

The 2015 profile shown in ***Table 2*** does not yet link to EQ (Explorer Quotient) segments. With Tourism Nova Scotia's recent adoption of EQ Segmentation, the winter segments may change, as the research looks through the EQ lens in 2016.[7]

At the same time, TNS will also continue to provide demographic information, link lone travelers, couples, families, etc. to Visitor Exit Survey information. Winter travelers are currently under the "outdoor activity" segment, which fits well under the EQ umbrella. Future development of the EQ model will leverage work within currently defined segments.

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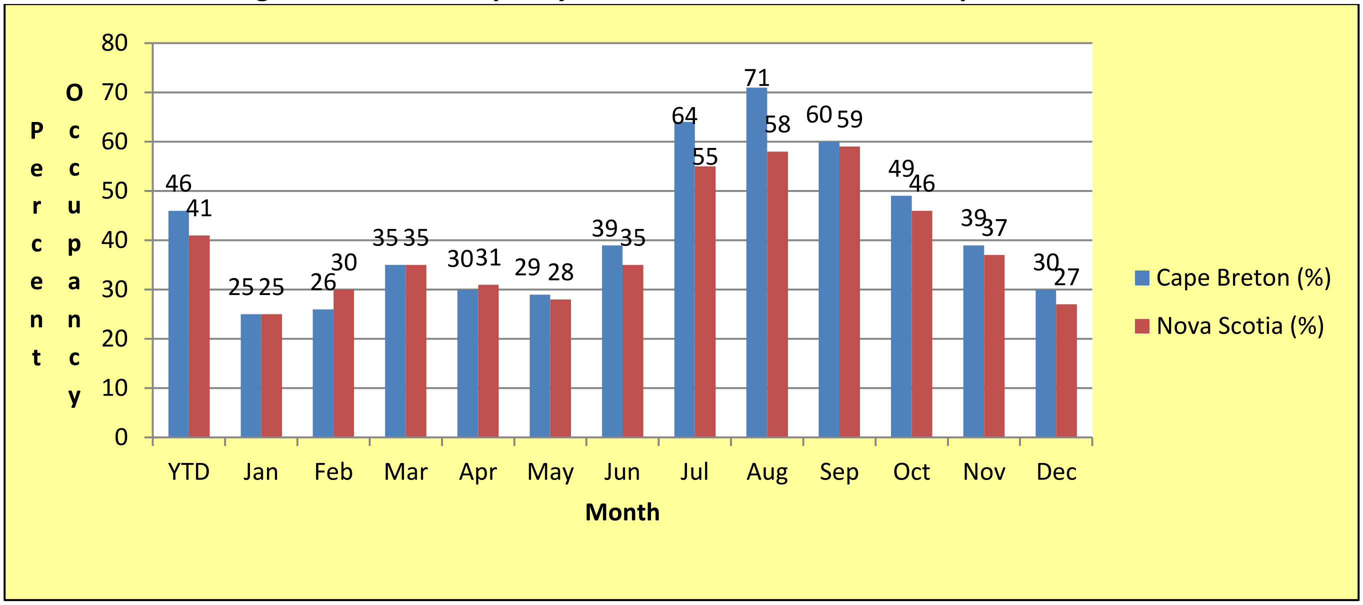
[6] NS 2015. *Nova Scotia Tourism Market Profile: Winter Travelers 2015*, http://tourismns.ca/sites/default/files/page_documents/winter_travellers.pdf

[7] Many profiles will be updated once Tourism Nova Scotia has completed the *2015 Visitor Exit Survey*. The survey is in field until the end of April, 2016 and full year reports should be released by Autumn 2016. Anna Moran, Manager, Research, Planning & Decision Support, Personal communication, April 12.

Figure 1: 2015 Occupancy Rates for Nova Scotia and Cape Breton[8]



NS Outdoor Winter Activities

Activity-based trails figure prominently in visitor activities and have become a traveler expectation. However, all trails are not created equal. ***Destination Trails*** have the potential to motivate travel and are link communities, services, amenities, cultural experiences and a mix of facilities. Trail experiences that have the potential to motivate travel, are termed *Destination Trails* where communities and facilities are linked. These are distinct from ***Supporting Trails*** which are part of the visitor experience/activity while in the Province (i.e. visitors may cycle or hike the because it is close to their accommodation or attraction).[9]

Cape Breton's **Celtic Shores Trail** is one example of a Destination Trail and involves 6-7 community groups that have branded this name and worked with Tourism Nova Scotia to look at the trail visitor and the services they will be seeking. Considerable dollars and volunteer human resources have been used to do trail assessments, upgrades, a website and the trail is now going through market readiness requirements.

Nova Scotia has thousands of kilometres of recreational trail opportunities throughout the province. Some are managed by federal, provincial or municipal governments, but most community trails are managed by volunteers within the community the trail serves.[10] The CBRM, like many municipalities, uses a "*community support model*", for trails and other recreation activities; this means there is minimal direct programming. Instead there is reliance on community groups which are supported by the CBRM.

[8] *Nova Scotia Tourism Indicators*, December 2015 (at January 2016).
[9] Yule, Heather, Acting Manager, Development, Tourism Nova Scotia, E-mail communication, March 15.
[10] NS Trails, 2016. *Advancing Pathways to Discovery, Wellness and Community Connections -- A Shared Strategy for Trails in NS* (Draft), Feb 4, 2016.

A recently completed *Cape Breton Trail Review and Inventory*[11] documents trails, ranging from hiking/walking to off-road cycling, all-season motorized to winter trails. However not all trails are "market-ready" per se.

There are 33 Cape Breton Island trail listings on novascotia.com; 26 of these are located in Cape Breton Highlands National Park (CBHNP). These trails conform to International Trail Standards ensuring that they are market ready -- so are a "sure thing" from a tourism marketing perspective.

Nova Scotia Trails and Market Readiness Enhancement

As the trails movement in Nova Scotia has grown and matured, new initiatives have been adopted, such as:

- a trail patrol program
- affordable general liability insurance - the Nova Scotia trail insurance program is considered the gold standard. It is the only one of its kind in the country and is being used as a model elsewhere.
- educational programs
- rider safety training
- risk management training
- youth engagement programs
- trail - specific funding from multiple sources for construction, maintenance, engineering and capacity building
- guided trail events.

Snowmobiling in NS

From a Tourism Nova Scotia perspective, snowmobiling is a niche market. Exit survey data shows that about 4% of non-resident visitors are interested or participate in snowmobiling.[12]

The resident market is small but identifiable; the size of the residential snowmobile market in NS is estimated at 7,463 riders, with annual estimated expenditures on outings of $23.7 million [12] (fuel: $5.4 m; Food & beverage: $4.1 m; lodging $3.0 m; outing fees $10.3 m). A complete profile of the NS snowmobiler is found in SANS, 2012[13].

The NS resident snowmobile market is profiled in Table 3.

In terms of market-readiness, the Snowmobile Association of Nova Scotia (SANS) is all about safety. SANS has adopted an international standard on signage (SANS sign guidelines recommended by the International Association of Snowmobile Administrators). All trails have land-owner permission; licenses on crown land are in place to access the extensive network of trails; license agreements are in place with DNR for wilderness protected areas. Trails are mapped using GPS coordinates and self-service signs (e.g. medical emergency) and cell coverage signs (yellow) are present on designated snowmobile trails.

[11] *Cape Breton Trail Review and Inventory*, January 2016. Prepared by Cobequid Trails in Association with RMA Tourism Ltd. for Destination Cape Breton Association.

[12] OHV Spending, 2015, *Off Highway Vehicle President's Council Spending Survey: Report on Direct Spending in Nova Scotia*, by Nova Insights Inc. Sponsored by: Snowmobilers Association of NS (SANS), ATV Association of NS (ATVANS) and NS Off-Road Riders Association.

[13] SANS 2012, *Snowmobilers Association of Nova Scotia Trail Pass Survey 2012*, by Nova Insights Inc.

Table 3: NS Resident Snowmobiler Profile[12]

Those who participate in snowmobiling:

- Have a median household income of $97,000
- 66% are male and a majority also own ATVs.
- Ride their snowmobiles about 1,750 kms per year
- Spend about 7.2 nights per snowmobile season in paid accommodation.[1]
- **South west NS snowmobilers** (Zone 3) are less likely to ride in their own zone so represent a potential market for Cape Breton.
- **Cape Breton snowmobilers** (Zone 1) are more active and committed to the sport, traveling further to the trail, travel with more people, spend more on equipment and are far more likely to belong to a club.
- Having amenities close to trails is important for almost all snowmobilers, so it is important to identify what is open.

In Nova Scotia, it is currently illegal for OHVs (off highway vehicles) to cross four-lane controlled access highways. This makes it difficult to develop an intraprovincial trail, with linkages to all communities, including in Cape Breton. SANS is currently lobbying the province to have this restriction changed to be consistent with rules in other provinces and has requested 3-4 crossings on these highways where it is safe to do so (Baddeck is one of these areas).[14]

ATVing in NS

ATVing is an activity that takes place year round, including winter. The image of ATVing has been elevated in recent years, with more conscientious participants and an emphasis on safety. The ATV Association of Nova Scotia (ATVNS) represents the interests of riders.

There are an estimated 35,281 ATV riders in Nova Scotia; 13% of ATV riders also have snowmobiles.[15]

Off highway vehicle (OHVs) riders in general:

- Travel an average of 130 kms. for special outings;
- Go on 2 outings per year;
- Spend 1.3 nights away from home;
- Take 4 passenger vehicles and 7 OHVs per outing with 10 people in the group;
- Each person spends $327 per special outing. [17]

NS ATV riders had total direct spending of **<u>$42.1 million (M) on outings</u>** during 2015:

- Outing fees $13.2M
- Lodging $ 5.5M
- Entertainment $ 1.7M
- Food & Beverage $10.6M
- Fuel $11.1M

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[14] SANS does not support a wide open policy of crossing anywhere as it would lead to an unsafe conditions.

[15] *OHV Spending Survey 2015 -- OHV Report on Direct Spending in Nova Scotia*, by Nova Insights for the Off Highway Vehicle President's Council. N

4.3 New Brunswick Winter Product

New Brunswick hosted 2.8 million visitors in 2015, with total visitor spending of $1.14 billion. Based on room nights sold in December, January and February, about 24% of these visitors com during winter months. Provincial occupancy rates during these months range from 35% in December to 40% in February.[16]

New Brunswick has a relatively strong winter product, predominantly located in the northern part of the province. While there is no explicit strategy per se, snowmobiling and downhill skiing are featured in promotions http://www.tourismnewbrunswick.ca/Do/OutdoorActivities/WinterActivities.aspx. Indoor activities, winter festivals/events and parks are highlighted on the winter activity page.

The province boasts the "most snow" in the Maritimes and Atlantic Canada's largest ski vertical. Major downhill ski slopes are shown in ***Table 4***.

Table 4: New Brunswick's Major Downhill Ski Slopes

1. **Ski Crabbe Mountain**: 45 minutes north of Fredericton; 27 trails and glades.
2. **Sugarloaf Provincial Park**: 12 Alpine ski trails, ski school, groomed cross-country ski trails and snowmobile trails, snowshoeing, tobogganing, tubing and ice skating. 1,000 ft. summit outside Campbellton.
3. **Mont Farlagne**: near Edmundston; 22 ski runs, snow park; tubing, snowshoe trails, ProShop, rentals
4. **Poley Mountain**: southern NB, 10 kms south of Sussex in the southern NB "snow belt". 30 trails, 5 lifts, rebuilt in 2015; new lodge.

NB Inside activity options are also featured, including a link to accommodations as well as activity centres; cultural attractions, galleries theatres, night time entertainment options. http://www.tourismnewbrunswick.ca/Do/OutdoorActivities/WinterActivities/Winter-Indoor.aspx

Snowmobiling: The snowmobile product is mature and well known. Recent estimates value the industry at $25 million.[17] That there are more than 20,000 snowmobile users in New Brunswick (residents and visitors). The infrastructure to support this "white gold" industry includes multiple rail bed trails crisscrossing the province and acting as main trunks for 8,000 + kilometers (4,900 + miles) of maintained trails. The New Brunswick Federation of Snowmobile Clubs (NBFSC) is a volunteer association of 52 clubs with 20 000 members that has a mandatory trail permit system with a dedicated funding plan.

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[16] NB *2015 Tourism Indicators*, hc-tpc/pdf/RSP/Indicators_Indicateurs/IndicateursDuTourisme2015TourismIndicators.pdf
[17] Fraser, Bill (2015), NB Minister of Tourism, Heritage and Culture, http://www2.gnb.ca/content/gnb/en/news/news_release.2015.07.0733.html

ATVing: In 2010, ATV spending in NB was estimated to generate a total sales volume of $12.2 million, and the value added to the provincial economy from ATV tourism visitor spending was estimated at $4.9 million dollars.[18] In 2010, there were 35,825 ATVs registered in NB and a total of 9,122 trail permit holders. 8,057 of these trail permit holders were from NB. The majority of trips are taken in the winter. ATVing is represented by the NBATV Federation which looks after trail development.

4.4 Newfoundland and Labrador

Newfoundland had 503,000 visitors in 2015 who spent $492.8 million. The percentage of these visitors traveling in winter is not published but the average accommodation occupancy is 50% -- on par with that of Nova Scotia. Newfoundland's winter activity push is predominantly located in western and central Newfoundland and Labrador where snow is generally guaranteed. Winter is part of overall NL "Season Extension" NL efforts.[19]
Festivals (Snow West) and Events (Mid-Winter Bivver, Cain's Quest) have been supported over the past few years by many partners including government (with varying degrees of success) as well as a more concerted effort to develop market ready, packagable offers on NL.com.

Marble Mountain receives annual operating/marketing support and incorporate a new chair line in 2015 (*The Lightning Express*) at nearly 4 million – but serves a mostly local market.

There are several community winter carnivals around the province with an entire continuum of winter programming; some have non-resident appeal, but mostly are community-type celebrations. Key NL winter activities are shown in ***Table 5***. There are several cross-country venues/clubs/rentals across NL – both for backcountry x-country and snowshoeing.

Table 5: Winter Activities/Experiences Highlighted under "Things to Do" on the NL Website

Skiing and Snowboarding
Downhill:
➢ Marble Mountain; 1,700 vertical drop, 37 runs, 5 lifts, novice-expert
➢ Smokey Mountain Ski Club: Labrador (City)
➢ White Hills: Eastern NL, 2 hrs. from St. John's.
Cross-country:
➢ Gros Morne National Park
➢ Terra Nova National Park
➢ Menihek Nordic Ski Club: Labrador City, 15 kms.
Tour Operators
➢ Riverfront Chalets Snowmobile Tours: Central NL
➢ Cycle Solutions: snowshoeing, Western NL

Source: http://www.newfoundlandlabrador.com/

[18] (*The Economic Impact of ATV Tourism in New Brunswick by NBATVF Trail Permit Holders 2010 – 2011*, NB Department of Culture, Tourism and Healthy Living, May 2012).
[19] *NL Strategic Directions: Vision 2020*: http://hnl.ca/resources/vision-2020/7-strategic-directions/strategic-direction-4 /.

Non-Motorized Activities: Several outdoor winter activities take place near St. John's[20] including: 1. Winter Zip lining (North Atlantic Zip lines), 2. Skating the Loop (Bannerman Park), 3. Cross-country skinning/snowshoeing (Pippy Park) and a variety of urban indoor activities (e.g. the Rooms, Johnson's Geocentre and shopping options.)

Snowmobiling: Snowmobiling is important to Newfoundland. Unofficial figures are 10 years old and highlight the impact of snowmobiles in 2005 the range of $190 million per year (est.).[21] Newfoundland has over 5,000 kms of groomed trails. Trail passes available from the NL Snowmobile Federation: nlsf.org or in Labrador from one of four local snowmobile clubs. The few tour operators who offer snowmobiling tend combine the activity with packages with backcountry accommodations; on one's own or with a guide. Labrador has 1,500 kms of groomed trails with 5 key trails in province http://www.destinationlabrador.com/guide/snowmobile_trails.htm

The NL Snowmobile Federation governs 16 volunteer snowmobile clubs across the island. They are responsible for the costs associated with the insurance for the groomers, trails across the island, and the day-to-day expenses. The NLSF owns all groomers on the island and clubs use them to maintain 3,700 of groomed trails. Close to $11 million has recently been spent on infrastructure development (trails, bridges, warm-up shelters, groomer shelters, etc.…), and groomer purchases for the island.[22]

An economic impact study underway with the NL Snowmobile Federation to gain some benchmark insights into that sector's contributions (and to lay the foundation for future models of sustainable development/operations for that organization and the snowmobile/winter stakeholders) moving forward.

Backcountry snowmobile riding (with groomed trail accessibility to the backcountry) especially in Western NL and Labrador holds latent product development potential.

There are 10 winter packages offered on the NL website, mostly in Western NL. Fat biking and other niche winter offers have potential to round things out product offerings.

[20] http://destinationstjohns.com/article/notable-winter-activities-in-the-capital/, 2016.
[21] Grandy, Elroy, Burin Peninsula Trailway Board Inc., *The Packet,* August 5, 2015 http://www.thepacket.ca/Opinion/Letter-to-the-editor/2015-08-05/article-4235609/ATV-industry-needs-regulations-to-grow/1
[22] NL Snowmobile Federation Website: http://nlsf.org/faqs/.

4.5 Prince Edward Island

Prince Edward Island (PEI) had 1.4 million visitors in 2015. About 8.2% come in November-December and an additional 14.5% arrive between January-April.[23] Winter occupancy rates run at about 24%.

PEI has no winter strategy and, self-admittedly does not target the winter visitor. As such, there very little in the way of winter tourism product. Most activities, festivals and events are targeted at residents, including Winter Carnivals, Live @ the Centre, art exhibits, bonspiels, hockey tournaments, community events, and more.

Non-motorized Outdoor Activities: Brookvale Provincial Ski Park alone offers alpine hills 9; lifts 2; Nordic Trails – 9 (closed in Mar due to weather); snowshoeing, tubing; rentals are available.

Snowmobiling: Snowmobiling is considered a largely resident activity. The Island has almost 1,000 kms of trails with trail permits required; seasonal and visitor (valid for 3 days) trail permits are available through the PEI Snowmobile Association.http://www.peisa.ca/front_home.php. There are five clubs on the island. Trail conditions available on the PEI Snowmobilers Association website.

[23] *PEI Exit Survey 2014*, Overall Results, Department of Economic Development and Tourism & Centre for Tourism Research at TIAPEI.

5. MARKET READINESS CRITERIA

One of the objectives of the Cape Breton winter product inventory was to develop market-ready criteria for winter products/experiences. Market ready criteria development included: a) a review of definitions and criteria used across Canada, and b) proposing appropriate winter-readiness criteria for DCBA.

For Nova Scotia, the **building blocks** of market - readiness include[24]:

1. Compelling, market-ready offers, targeted to selected audiences, based on unique selling propositions (USPs), along with competitive advantages and good value.
2. Seasonal offerings to sustain revenue and profitability in both high and low demand periods.
3. Connecting with customers and motivating them to respond to your offers through effective promotional programs.
4. Reinforcing credibility through quality service and connecting with consumers through social networks.
5. Making it easy for customers to plan and buy – offer booking options, information and suggested itineraries and packages.
6. Building and sustaining positive relationships with customers, particularly those that might become repeat clients.

Definitions: for market readiness, visitor readiness and export readiness found across Canada are shown in ***Appendix B**.* It was recommended that the term "*Visitor Ready*" be adopted for Cape Breton Island winter products that can be applied to all products, year round, as follows.

Proposed Visitor Ready Definition:
Visitor Ready refers to an operation which has all licenses, permits, and insurance to operate legally, markets to and communicates with potential visitors year round and, in the case of accommodations, accepts advanced reservations.

This definition was broadly used when developing the *2016 Cape Breton Winter Product Inventory*. However, it became apparent that all (i.e. food establishments) did not always accept advanced reservations – it may be appropriate to remove them from the inventory.

Criteria: A mixed bag of market readiness criteria exists across the country. New Brunswick and British Columbia have developed basic and additional criteria. **Comparisons of Market Readiness Criteria** for key Canadian destinations have been provided to DCBA in an earlier report. From these, several were selected for consideration while conducting the inventory but were not strictly applied to all properties. Proposed criteria for future use are shown in ***Table 6***.

[24] NS, 2013. *A Guide to Marketing Your Nova Scotia Tourism Business*. Economic Planning Group.

Table 6: Proposed Visitor Ready Criteria

1. Compliance with regulations: has all licenses, permits, and insurance to operate legally,
2. Markets to potential visitors year round
3. Consistent hours of operation
4. Open consistently for at least two consecutive months during Winter (Dec, Jan, Feb, Mar)
5. Consideration of the CBI *12 Essentials* (as guidelines)
6. On-line presence (Website, Facebook, Twitter)
7. Point of Contact: contact telephone number or (and?) e-mail contact year round
8. For accommodations, Accepts advance reservations.
9. Provides 24-hour turn around to requests

6. CBI Winter Tourism Product/Experience Inventory

The ***2016 CBI Winter Tourism Product/Experience Inventory*** is shown in the pages that follow.[25]

Assuming that the total number of tourism operators on Cape Breton Island is rounded at 500, it is estimated that about 25-30% (140 approx.) are open during winter (i.e. year round). Some operators cater to residents but serve visitors when they are on the Island.

This number includes about:
- 70 accommodation operations, with a mix of hotels and cottages/cabins,
- 70+ food and beverage operations,
- numerous outdoor activity options, at least 2 of which are private sector operators,
- 19 art galleries, artisans, shops, and
- a handful of attractions (about 10), most of which are demand supporters, versus demand generators, as they do not motivate visits.

At the outset, it must be stated that **the *2016 Winter Inventory* is a snapshot at a given point in time** -- it is a moving target. Even as the inventory was being developed, some operators called to indicate changes in operations. Moreover, the relative lack of snow during the 2016 winter limited offerings of operators relying on outdoor activities.

The ***2016 Winter Inventory*** is divided into five sections:
1. Accommodations
2. Food and Beverage establishments
3. Outdoor Activities
4. Crafters, Artisans and Shops
5. Attractions and Ongoing Events.

6.1 CBI Winter Accommodations[26]

During the winter of 2016, 60 accommodations were open for business (***Table 7***). Most of these are also listed with cbisland.com (red highlights). As expected, many of these are in the Sydney area. However several are scattered across the Island. About 1/3 are also listed on novascotia.com; the remaining 2/3 are not.

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[25] The inventory does not include festivals, special or public events, music concert or sporting events as travel is typically determined by the festival or event. (Tourism Nova Scotia, 2015).

[26] Airbnb, Kijiji and Vacation Rental by Owner (VRBO) listings are not included as these establishments are not considered market ready in that they often do not have licenses, permits or insurance in place to operate legally.

Table 7: CBI Accommodations Open during Winter 2016

Red boxes indicate listing on cbisland.com

	Property	Location	Description
Cape Breton Regional Municipality			
1	Colby House B&B	Sydney	7 rooms/suites
2	Beacon Motel & Lodge	Sydney	9 AC rooms (6 housekeeping units)
3	Linden Tree B&B	Sydney	3 rooms all with ensuite bath
4	A Paradise Found B&B	Sydney	3 rooms all with ensuite bath
5	Royale Hotel	Sydney	4 rooms private bath; 3 rooms shared bath
6	Premiere Executive Suites - Spanish Bay Inn	Sydney	6 apts; 5 queen rooms
7	(Days Inn) Travelodge Inn & Suites	Sydney	163 AC rooms
8	The Gathering House B&B	Sydney	3 rooms; 1 with private 2 with shared baths
9	Holiday Inn Sydney-Waterfront	Sydney	155 harbour view rooms
10	The Comfort Inn	Sydney	60 rooms, newly renovated
11	Martin Arms	Sydney	65 rooms
12	Cambridge Suites Hotel	Sydney	148 suites
13	Hearthstone Hospitality (aka Quality Inn)	Sydney	69 executive suites, double & single rooms, restaurant, lounge
14	Hampton Inn and Suites	Sydney	128 guest rooms
15	Clansman Motel	North Sydney	suites, singles, twins, cottages, restaurant
16	At the Harbourfront B&B Inn	North Sydney	3 rooms
17	A Boat to Sea B&B	North Sydney	3 rooms
18	Heritage Home B&B	North Sydney	4 rooms, 3 ensuites
19	Aaron's Dove House B&B	North Sydney	3 rooms with ensuites; 1 cottage
20	White Maples B&B	Howie Centre	2 rooms; shared bath
21	The Birches at Ben Eoin Country Inn	Ben Eoin	12 suites, restaurant
22	Fiddlers Lake B&B and Apt.	near Gabarus	1 rm & 1 apt.
Port Hawkesbury			
23	Hearthstone Hospitality	Port Hastings	26 rms, restaurant
24	Maritime Inn	Port Hawkesbury	73 rms, restaurant
25	Mackenzie House B&B	Port Hawkesbury	4 rms
26	Skye Lodge	Port Hastings	49 rms, restaurant
Inverness			
27	Cranton Cottages	Margaree Centre	6 housekeeping cottages
28	River Trail Cottages	Margaree Centre	6 housekeeping cottages
29	Margaree Harbour View Inn B&B	Margaree Habour	3 rooms
30	Duck Cove Inn	Margaree Harbour	24 suites, dining room

Continued…

Table 7 (continued)

	Property	Location	Description
31	Tulloch Inn	West Lake Ainslie	6 rooms
32	Big Intervale Fishing Lodge Restaurant & Cabins	Big Intervale, Margaree Valley	6 housekeeping cottages
33	Pilot Whale Chalets & B&B	Cheticamp	3 chalets; one deluxe suite, standard suites
34	Pilot Whale B&B	St. Joseph du Moine	3 luxury suites
35	Auberge Baywind Suites	Cheticamp	4 waterfront suites
36	House Next Door B&B	Cheticamp	2 suites; available as 3 bed house
37	Maison Fiset House	Cheticamp	8 suites
38	Nestle In Suites	Cheticamp	3 suites
39	Soliel Chalets	Cheticamp	10 chalets
40	Keltic Quay	Whycocomagh	6 cottages; 12 suites
41	Cape Escape	Whycocomagh	1 single B&B with ensuite
42	Hebridean Motel	Port Hood	18 units
43	Chisholms of Troy Coastal Cottages	Troy	11, 1&2 bedroom cottages; 4 suites
Victoria			
44	Seaweed and Sod Farm B&B	Kempt Head	2 rms with shared bath
45	Iona Heights Inn	Iona	21 rooms - renos; restaurant, choc shop
46	Inverary Inn (Cape Breton Resorts)	Baddeck	185 rooms, pub, dining room
47	Telegraph House	Baddeck	18 Lodge Rooms; 13 motel rooms; 4 cabins, rest.
48	McIntrye Housekeeping Cottages	Baddeck	8 Cottages & 1 house
49	The Dunlop Inn	Baddeck	5 rooms with private baths
50	Lynwood Inn	Baddeck	3 suites, 29 rooms, 2 cottages, restaurant
51	Cabot Shores Wilderness Resort and Retreat	Indian Brook	4 chalets, 1 winter yurt (7 total), domes (tree top), lodge, bistro
52	Back Cove Cottages	Neil's Harbour	6 cottages
53	Channel Breezes B & B	Dingwall	2 rooms, 1 ensuite & 1 pvt. 4 piece bath
54	Knotty Pine Housekeeping Cottages	Ingonish Ferry	9-10 cottages
55	Castle Rock Country Inn	Ingonish Beach	17 rooms; restaurant
56	The Sleeping (Zzzz) Moose Camping Cabins	Birch Plain	2 insulated cabins w ensuite, restaurant
Richmond			
57	Bras d'or Lakes Inn	St. Peter's	19 rooms, restaurant
58	L'Auberge Acadienne	Arichat	9 Inn suites & 9 Motel units
59	Lakeside Seniors Cottage	West St. Peters	detached 3 bed holiday home

6.2 Food & Beverage Establishments/Restaurants

Outside of the Sydney and Port Hawkesbury areas there are several food establishments (***Table 8***). In rural areas, there is a mix of take-out, fast food, pub food, cafes and family restaurants. Generally, fine-dining is confined to Sydney.

In terms of numbers, there are a over 18 options in the Sydney area (CBRM), 20 in Victoria County, 18 in inverness County, 5 in Port Hawkesbury and 4 in Richmond County.

Note: Grocery stores and individual fast food restaurants are included in rural areas as they have "take-out" foods and are often used by visitors who stay in self-service accommodations. In urban centres (Sydney and Port Hawkesbury) grocery stores are excluded and only select fast food operations are included.

Table 8: CBI Food and Beverage Establishments Open During in Winter 2016

	F&B Establishment	Winter Opening Hours (YR=yr. round)	Location
	Cape Breton Regional Municipality		
1	Cape Breton Farmers Market	YR Sat 8:30-1pm	Sydney
2	Wentworth Perk Coffee House	YR 7:30-8pm	Sydney
3	Kiju's Restaurant	YR 11-9 S&S,10 pm	Sydney
4	Governors Pub and Eatery	YR 11-11	Sydney
5	A&K Lick-a-Chick	YR 11-11	Bras d'Or
6	Flavor 19 at the Lingan Golf Club	YR Mon-Sat 11:30-9	Sydney
7	Flavor Downtown	YR 8-9	Sydney
8	Flavor on the Water (Port)	YR Daily 11-9 or 10	Sydney
9	Trio	YR Daily 5-10	Sydney
10	Amedeo's Italian Bistro	YR Daily 11-10	Sydney
11	Napoli Pizzeria	YR 11-12	Sydney & Sydney River
12	The Olive Tree	YR Mon-Sat 11-9	Sydney
13 +	Tim Horton's	YR General: 5am-11pm	Sydney & Area - 10 locations
14 +	Kenny's Pizza	YR, 11-12am, 1am weekends	Sydney area - 8 locations
15	A1 Pizza	YR, 11-1am, 11-3am weekends	Sydney
16	Boston Pizza	YR, 11-1am, 11-2am weekends	Sydney
17 +	Greco Pizza	YR, 11-12am, 2am weekends	Sydney & North Sydney
18	Malcolm's Dining Room at the Birches	W-Tues-Sat from 5 pm	Ben Eoin
	Inverness		
19	Sandeanies Bakery & Tea Room	YR, 7:30-3pm	Port Hood
20	Admiral Tavern	YR; 11-11pm	Port Hood
21	Galloping Cows Fine Foods (Pizza)	YR; Fri-Sat 3-8	Port Hood

Continued…

Table 8 (continued)

	F&B Establishment	**Winter Opening Hours** (YR=yr.round)	**Location**
22	The Mull Café & Deli	YR; 11-7	Mabou
23	Mabou Freshmart	YR, Daily 8-6pm	Mabou
24	Dancing Goat Café & Bakery	YR; Daily 7-5 or 8pm	Margaree
25	Coal Miners Café & Lounge	YR, 6:30-3pm	Inverness
26	Cabot Public House	YR; 12-10pm	Inverness
27	Village Grill Restaurant & Reel Pizza	YR; 11-8	Inverness
28	Downstreet Coffee Company	YR; 7-3	Inverness
29	Robins Doughnuts	Daily	Inverness
30	Doryman Pub & Grill	YR, Mon-Sat 10-10; Sun 12-10	Cheticamp
31	Evangeline Restaurant - Pizza Shack	YR; 6:30-11	Cheticamp
32	Happy Clam Café & Grill	YR, 6-4pm	Cheticamp
33	All Aboard Restaurant	YR, Wed-Sun 12-2, 4-10 +	Cheticamp
34	Le Gabriel Restaurant & Lounge	YR, Daily 10-12am	Cheticamp
35	Farmer's Daughter Country Market	YR, 7-7pm	Whycocomagh
36	Charlenes Bayside Restaurant & Café	YR, daily 11-7on	Whycocomagh
	Victoria County		
37	Bean There Café	YR, 6:30-4pm	Baddeck
38	Thistledown Pub at Inverary	YR Thurs-Sat, 5-12pm	Baddeck
39	Clean Wave Restaurant	YR Mon-Fri 11-6	Wagmatook
40	Julia's Bakery	YR, 8:30-6pm	Baddeck
41	Three Doors Down (Diner)	YR; 11-7pm	Baddeck
42	Tom's Pizza	YR, 11-11pm	Baddeck
43	Tim Horton's	YR 5am-11pm	Baddeck
44	Legion Branch 53	YR 2016; Mon-Sat - 12:00-8:00pm	Baddeck
45	Stand & Stuff Your Face Takeout	YR, Mon-Sat 12-8pm	Baddeck
46	Baddeck Forks Golf Course	YR Sat & Sun	Baddeck
47	Victoria Farmers Co-op	YR, M-W, Sat 8:30-7; Thu-Fri to 8pm	Baddeck
48	Frolic & Folk Pub Café	YR, Thu-Sun 11-9pm -Pub to 12am	Iona
49	The Dancing Moose Café	YR Dec-Apr Thu-Sun, 7-4	Birch Plain
50	Andrew's Pizzeria	YR - Thu 11:30-7pm; Fri-Sat 3-7pm	Ingonish
51	Avalon at Castlerock Country Inn	YR - 7-9am and 6-8pm	Ingonish
52	The Bay Café	YR, 8-4pm	Bay Saint Lawrence
53	Co-op Foodland Neil's Harbour	YR, Mon-Sat 9-6, Sun 12-5	Neil's Harbour
54	Central Co-op - The Hut Takeout	YR Mon-Sat 9-5; Sun 12-5	Bay St. Lawrence
55	Celtic Touch Bakery & Pizzeria	YR; Mon-Fri 10-7; Sat-Sun 9-6	Dingwall
56	Cabot Trail Food Market	YR, 8-6pm	Dingwall
57	Ingonish Freshmart	YR,Mon-Fri 9-6; Sat-Sun 9-5	Ingonish

Continued…

Table 8 (continued)

	F&B Establishment	Winter Opening Hours (YR=yr.round)	Location
	Port Hawkesbury		
58	The Miller's Tap & Grill	YR, Mon-Sat 11-11, Sun 11-10pm	Port Hawkesbury
59	Tim Horton's	YR, Daily 5-12am	Port Hawkesbury - 2 locations
60	Fleur de Lis Tea Room & Dining room	YR; Mon-Sat 7-7pm; Sun 10-2pm	Port Hawkesbury
61	Rose Garden Restaurant	YR; Daily	Port Hawkesbury
62	China King Buffet Restaurant	YR; Daily	Port Hawkesbury
	Richmond		
63	L'Auberge Acadienne Inn Dining Room	YR Tue-Fri 6-9pm; Sat/Sun by rez.	Arichat
64	Tim Horton's	YR, 5am-11pm	St. Peters
65	MacBouch Beverage Room Grill	YR, daily	St. Peters
66	Louie's Cosy Corner	YR, 8am-9pm	St. Peters

6.3 Outdoor Activities

6.3.1 Non-motorized Activities

Snowshoeing and Cross Country Skiing

The myriad of trail sites and hiking clubs makes finding trails – even winter trails – challenging to visitors. As a starting point – and to simplify the inventory -- trails noted on the www.novascotia.com website as offering snowshoeing and skiing were identified and are highlighted using green square. These sites were augmented by others found during the course of the research. Some trails are groomed; others are not.

X-country skiing and snowshoeing activities are available throughout the winter in the Highlands. two ski centers offer a combined total of close to 50 kilometers of lowland trail that's groomed daily for both classic and skating techniques. Additionally, in the highlands the deeper snow covers the low scrub bushes, enabling guided backcountry skiers to travel routes impassable during the summer months, accessing with ease the mountains-meeting-the-sea vistas for which the area is famous.

A world-class x-country facility at Cape North staffed by dedicated volunteers and consistently open through March. Most visitors to this facility stay nearby. In addition, there are many other trails as noted in the Cape Breton Trail Review and Inventory[12]. And there are many ungroomed trails.

Contrary to popular believe, the Park IS open during winter. There is no charge for entry and the trails are still accessible, although not groomed. There is some visitation in winter and the Park provides some information (at the side door of the entry kiosk?). Visitor counseling is provided; many people stay in Cheticamp

While arguments can be made for x-country skiing in the Highlands, reliance on the downhill ski product cannot be counted on – the winter of 2016 is a case in point. Ski Cape Smokey only enjoyed a brief season. With more and more extreme weather expected, reliance on snow is tenuous.

While not directly tourism-related, there is evidence of a move to "push" the winter outdoor product. For example, Hike Nova Scotia put a call out for fall guided hikes and winter guided snowshoe hikes (50 across the province) suggesting that snowshoeing interest is increasing. Moreover, there appear to be recreation-based grants for programming that community groups can access -- if human resources are present to organize activities/experiences.

An inventory of snowshoe and cross-country ski areas is shown in ***Table 9***. The inventory does not include all trails across the Island but those which tend to have access to services nearby. Rinks which provide largely community based activities or hockey tournaments.

Table 9: CBI Snowshoe and Cross-Country Ski Areas & Rentals

Green boxes indicate listing on *novascotia.com*

	Individual Listing	Winter Hours	Location	Snow-shoeing	Skiing
	Cape Breton Regional Municipality				
1	CBRM Community Trails	Daily	29 trails, Sydney Area, mapped	●	√
2	Petersfield Provincial Park	"	Sydney	●	√
3	Framework Cycle and Fitness	"	Sydney, snowshoe rentals	●	
4	Mira River Provincial Park	"	Albert Bridge	●	√
5	Two Rivers Wildlife Park	Daily 10-4pm	Huntington	●	√
6	East Bay Hills Trail	Daily	East Bay	●	√
	Victoria County				
7	Baddeck Forks Golf Club	Daily	Baddeck	●	√
8	Bell Bay Golf Club	Daily	Baddeck	●	√
9	Cape Breton Guided Walks	By appt.	Baddeck	●	
10	Uisage Bàn Falls Provincial Park	Daily	Baddeck Forks	●	
11	Victoria County Guided Snowshoe Hikes	Sats 10am	From various locations (8 guided snowshoe hikes - out of a total of 11 on CBI with Hike NS)	●	

Continued…

Table 9 (continued)

	Operation	**Winter Hours**	**Location**	**Snow-shoeing**	**Skiing**
12	St. Ann's Health Centre	Sat, 8-12pm	St. Ann's, Saturday morning - Fall to March, Snowshoeing, cross-country ski or walks	●	√
13	Cape Breton Highlands National Park	Daily	Ingonish, Cheticamp & various access points, 26 hiking trails, ungroomed	●	√
14	North Highlands Nordic Ski Area	"	Cape North	●	√
	Inverness County				
15	Celtic Shores Coastal Trail (multi-use, groomed)	Daily	Port Hastings to Cape Breton Highlands National Park	●	√
16	Inverness County	Mon-Fri, 8-4pm	Port Hood, Snowshoe & X Country Ski Rentals	●	
17	Judique Flyer Trail	"	Part of Celtic Shores Coastal Trail	●	√
18	Ski Ben Eoin	"	Ben Eoin, 12 runs, 2 x-country tails	●	√
19	Ski Cape Smokey	Daily 9-4 pm	near Ingonish, closed early in 2016 due to poor snow conditions		√
20	Ski Tuonela	Yes	11 kms from exit 11 on Hwy 105;Ski Village is 4 km ski-in from Cabot Trail; Maritimes only serviced Telemark ski area; back-country/outback skiing		√
	Richmond County				
21	Battery Provincial Park	Daily	St. Peters	●	√
22	Lennox Passage Provincial Park	"	Lennox	●	√
	Port Hawkesbury				
23	Port Hawkesbury Community Trails	"	Port Hawkesbury	●	√

6.3.2 Motorized Activities

● Snowmobiling

It is not clear what percentage of snowmobilers on Cape Breton are from off-island.

While snowmobiling is considered a niche tourism market, it is a mature motorized sport. Snowmobilers seek long, linked trails and tend to spend dollars in rural areas and communities to which there are links. There is neither data on the number of snowmobilers to Cape Breton nor their economic impact.

CBI is identified as Zone 1 in Nova Scotia and boasts seven clubs: 1. Highland Trail Groomers (Cheticamp), 2. Cabot Snowmobile Club (Sydney?), 3. Crowdis Mountain, 4. Margaree Highlanders, 5. Inverness Capers, 6. Alpine Snowmobile Club, 7. Cape Clear Snowmobile Club.
http://www.snowmobilersns.com/nova-scotia/about-sans/member-clubs/

While some clubs do counts, there are no traffic counters so numbers are not always reliable.

As noted in the *Cape Breton Trail Review and Inventory*[12] most of the trails have been mapped. Cape Breton Island is in Zone 1. Major marked snowmobile trails run from Cheticamp in the north to Port Hastings and from Margaree to Whycocomagh. Margaree is a major hub. Grooming is considered to be state of the art. Hundreds of unmaintained logging roads branch off the marked trails. Getting lost and running out of gas could happen without a guide.

Proposed Baddeck Snowmobile Link/Access: Because it is currently illegal to cross 4-lane access highways, SANS has requested access over Highway 105 (near Baddeck) on Cape Breton – this access point has been the total focus for access during the past 2 years as it is key to opening up Baddeck to OHV business.[27] SANS has suggested that it will build an OHV bridge over the highway to provide access. The decision is pending but would enhance the appeal of the destination among snowmobilers.

CBHNP is currently closed to snowmobiles. The Highlands terrain is different from anywhere else in Nova Scotia. Discussions are underway with the Snowmobile Federation of Nova Scotia to permit park access to snowmobiles. One of the larger issues is safety: the wind in the Highlands (e.g. Barrens) picks up quickly and it is not safe for those unfamiliar with the area. SANS is negotiating with Cape Breton Highlands National Park to establish Park access (e.g. Ingonish has no access to the trails through the Park). Parks Canada is open to having trails through Park and negotiations are underway.

[27] Mike Eddy, March 2016, Snowmobilers Association of Nova Scotia (SANS). Personal Communication.

Most riders bring their own snowmobiles. There few places on Cape Breton where visitors who wish to can rent a snowmobile. Rentals are between $425-$475 for a weekend; trailers are extra at $40-$60/day (Highland Snowmobile rentals).

The clubs are shown in ***Table 10*** to provide an indication of the resources on the ground that can assist with hosting riders and for potential cooperative marketing efforts. Events are shown to provide an indication of rally dates.

Table 10: CBI Snowmobile Clubs and Related Offerings on CBI

	Operation	Offerings	Location
	Snowmobile groups who have developed and maintain snowmobile trails thorughout Capo Breton	Snowmobile map of all the trails available.	
1	Alpine Snowmobile Club		Mabou, Port Hood
2	Cape Clear Snowmobile Club	320 kms groomed trails, Club house	River Denys Mountain
3	Inverness Capers Snowmobile Club	120 kms groomed trails	Inverness
4	Margaree Highlanders	200 kms groomed trails	Margaree
5	Highland Trail Groomers Association		Cheticamp
6	Cabot Snowmobile Club		Sydney
7	Crowdis Mountain Snowmobile Club		Baddeck
9	Ceildh Trail Groomers Association	Groomers	Port Hood
10	Highlandview Snowmobile Rentals	Rentals	Baddeck
	Major Events	**2016 Dates**	
1	Ride for Dad	Sat, March 5	
2	Gary Ross Memorial Snowmobile Races, Middle River	Sat, Feb 20, 2016, storm date Feb 21	
3	Margaree Highlanders 27th Snowmobile Poker Rally and Dance	Feb 13, 2016 (day, eve)	
4	Middle River Snowmobile Rally	Mar 12, 2016 (cancelled due to poor conditions)	
5	St. Margaret's of Scotland - oldest public building in Inverness (1841)	Annual (early Mar) afternoon Mass on the Mountain for snowmobilers	Inverness - River Deny's Mountain, near Judique

● ATVing

As with snowmobiling, the ATV market is a niche one for Cape Breton. The activity is primary targeted at residents but riders do travel for the activity.

In terms of market readiness, ATVing is not as mature a sport as snowmobiling. Ten regional clubs map and manage the trails, which have varying levels of market readiness. Safety is emphasized. Sometimes designated routes are not clearly defined so mapping has not been completed and trail distances are not always determined (*Cape Breton Trail Review and Inventory*)[12]. Moreover, trails are also sometimes disconnected from one another by rivers, canals and oceans. Trail permits must be obtained from an authorized OHV club.

Access to trail networks are available through clubs in Richmond, Cape Breton, Victoria and Inverness counties. Rallies and group events draw visitors but ATV use is predominantly residential. Moreover, rallies are planned from year to year, with not much lead time for visitors. The demand for ATV tourism has not been assessed and trails are often inland with coastal viewing secondary.

Like their snowmobiling counterparts, one of the biggest complaints about ATVing in in Nova Scotia is the need to access to accommodations, fuel and food directly from the trail (i.e. riders need to trailer machines from where they are staying to get to the trails. It is apparent that information is lacking.

In terms of tourism, one ATV club member stated, "*I think with some common sense changes to the OHV regulations and some trail connectivity issues resolved, ATVing could be a huge attraction for the province on a year round basis. If the product is there, ATVers will find it*."

Limited connectivity makes it difficult to compete against other ATV destinations since ATV travelers wish to travel from one community to another; like snowmobiling this provides direct economic impacts for the host communities. If competing for the ATV tourism business, there would need to be plans to cross brides and make connections so riders can go from Inverness to Sydney.

The size of the resident ATV market cannot be ignored and when coupled with the New Brunswick population, group spends and propensity to travel in winter – give this market one which is worth a look from a winter perspective.

That being said, there may be potential to build on events held during winter and many resources on the ground to assist with hosting and cooperative marketing efforts (***Table 11***).

Table 11: ATV Clubs on Cape Breton

ATV Clubs & Related	Activity	Base Location
Isle Madame ATV Riders*	ATV riding	Arichat
Baddeck & Area All Terrain Club	" "	Baddeck
East Richmond ATV Club	" "	St. Peters
Highland ATV Club	" "	Cheticamp
Isle Royale ATV Club	" "	Sydney
Marconi Trailblazers ATV Club	" "	Glace Bay
Eddie's Small Engine Repair	ATV/Snowmobile related business	North East Margaree
ATG All Terrain Vehicle Enterprises	Rentals & tours by appt.	Sydney 2251 Hwy 104
Events/Rallies		
Isle Madame ATV Rider Assoc - Rally	Rally late February	Isle Madame
Coastal Riders ATV Assoc.	Luck of the Draw Rally end Jan, early Feb	L'Ardoise

*2nd largest club in Nova Scotia with 170 members

6.4 Art Galleries, Artisans, Shops

In comparison to summer, few artisans, shops and/or galleries are open during winter. Open establishments are shown in ***Table 12***. There are 19 open during the winter.

Table 12: CBI Art Galleries, Artisans and Shops

	Operator	Winter Opening Hours (YR=yr. round)	Location
	CBRM		
1	Cape Breton Centre for Craft & Design	YR, Mon-Sat 10-6	Sydney
2	Cape Breton University Art Gallery	YR, Mon-Fri, 10-4; Sat by appt.	Sydney
3	Best of Cape Breton Craft Shop	YR, Mon-Sat 8-6	Sydney
4	Leo MacNeil Designs	YR, Mon-Sat 8-6	Sydney
	Victoria County		
5	Baadeck Yarns	YR, Thu-Sat 10-5pm	Baddeck
6	Blue Heron Gift Shop Ltd.	YR, Mon-Sat 9-9; Sun 12-9	Baddeck
7	Boutique Patchouli	YR, Thu-Sat 10-5pm + Wed in Mar	Baddeck
8	The Outdoor Store	YR, Mon-Sat 10-5	Baddeck
9	Our Seaside Home Décor	YR, Wed-Sat 10-5pm	Baddeck
10	Wagmatcook Cult./Heritage Centre Gift Shop	YR, Weekdays, 9-4pm	Wagmatcook
11	Highland Village Museum & Gift Shop	YR, Mon-Fri 9-5pm	Iona
12	The Little Dipper Boutique	YR, Sun-Thu 10-6pm; Fri-Sat 10-8pm	Iona
13	Jill's Chocolate Cafe	YR, Daily 8am	Iona
14	Big Spruce Brewing	YR, 10-6; Sat 12-4	Nyanza
	Inverness		
15	Ann Schroeder Studio-Fine Arts Quilts	YR; Mon-Sat 10-5 by appt.	Mabou Harbour
16	Doug Fraser Art Gallery & Sculpture Garden	YR - 9-6 or by appt.	Inverness
17	Tears of Glass	YR - 10-7 (most days)	Inverness
18	Firehouse Iron Works	YR, Mon-Sat 9-4:30	Whycocomagh
	Port Hawkesbury		
19	Wooden Horseshoe Designs	YR, By appt. or chance	Port Hawkesbury

6.5 Attractions/Ongoing Events

Several attractions and ongoing events are open during the winter in the Sydney area (***Table 12***) but these are limited around the Island.

Table 12: Attractions/Ongoing Events Open During Winter

	Operation	OPEN	Offering	Location
	Music/ceildahs	Various times	Music EVENTS www.musiccapebreton.com/events2016	Cape Breton & NS
	CBRM			
1	Cape Breton Centre for Craft & Design	YR, Mon-Sat 10-6	Cape Breton crafts	Sydney
2	Membertou Heritage Park	YR, Mon-Fri 9-4:30	Living history, interpretation	Sydney
3	Casino Nova Scotia	Fri 11am to Mon 3am Mon-Thu 11-3	Gaming, slots, entertainment	Sydney
4	Joan Harris Cruise Pavillon Interpretive Centre	YR Mon-Sat 9-5	Interpretation of Sydney, shops, restaurant	Sydney
5	Cape Breton University Art Gallery	YR, Mon-Fri, 10-4; Sat by appt.	Gallery	Sydney
6	Cape Breton Centre for Heritage and Science	YR; Mon 1-4 Tue-Fri 10-4	In house and travelling exhibitions	Sydney
7	Two Rivers Wildlife Park	YR; Daily 10-4pm	over 50 species of animals, petting zoo, skiing, kids activities	Huntington
	Inverness			
8	The Doryman Pub & Grill	YR; Daily 10-10 til 2am Sats	Live Fiddle Music - Every Sat 2-6pm	Inverness
9	West Mabou Family Square Dances	YR; Sats 9-12pm	Square Dancing every Sat	West Mabou
	Victoria			
10	Big Spruce Brewing	YR, 10-6; Sat 12-4	Nyanza, west of Baddeck	Jeremy White
11	Rocking Horse Ranch and Rehab Centre	YR, by appt.	Rescue horse ranch; Lessons, visits, special parties, play pen petting zoo	near Baddeck
12	Wagmatcook Culture & Heritage Centre	YR, Mon-Fri 9-4	Small Interpretation centre, Sporadic events	Wagmatcook

7. OPPORTUNITIES ASSESSMENT

The following analysis is based on conclusions drawn from the situation analysis, inventory and consultations.

The winter travel market is relatively small. **However there are opportunities to target niche markets including resident and nearby markets seeking: getaways, x-country ski, snowshoe and hiking enthusiasts and snowmobilers.** While there is high AC participation in non-motorized winter activities – there is low participation when people travel -- unless they are coming specifically for the activity.

There is a pervading impression that most businesses are closed. Although this sentiment is to some extent borne out by the research, there are still approximately 25% of operators open for business – and not all are located in Sydney. Victoria and Inverness Counties boast several accommodations and eating establishments open during winter and there is room to support operators in various programs. Given the reliance on and tenuous nature of the weather, experiences need to be facilitated that rely less on snow.

Snowmobiling is a niche market but the product is market ready and has potential if: a) the weather cooperates, and b) it can be specifically targeted. To a lesser extent, the ATV product may provide opportunities in the long-term; it is a larger market and requires work to elevate market readiness levels and connect trails.

- **The Issues**

Several issues impede operators from being open during winter:

- **Unpredictable weather**: snow is not always present.
- **Market size:** CBI does not have the numbers to draw from for large scale winter tourism.
- **Why remain open?** There is a tax break (incentive) for "seasonal" operations (restaurants and roofed accommodations) that close for four months of the year.
- **Market perception** that Cape Breton (including CBHNP) is closed and/or far.
- **Limited Provincial emphasis** on winter tourism.
- **Staffing**: difficult to get qualified staff in winter; also people do not want to give up their employment insurance (E.I.) benefits.
- **Limited events, attractions, evening activities**: open during winter,
- **Limited/non-existent visitor information** during winter.
- **Difficulty in accessing fresh food products** (hard to shop local).
- **Snowmobile trail access:** Need to be on or have access to a snowmobile trail to tie into the snowmobile market (esp. at Baddeck); no access over controlled access highways.
- **ATV Trails:** Connectivity and market readiness of ATV trails needs improvement.
- **Expenses:** insurance, utilities make it challenging to open.

- **Strengthening CBI as a Winter Destination**

Operator ideas for strengthening CBI as a winter destination include:

- Coordinating and promoting organized outdoor activities operated by communities
- Engagement of businesses to remain open during winter.
- More evening activities, lodgings & food places open.
- CB Highlands National Park trails open & groomed.
- More attractions and events: events such as hockey and other things tend to work
- Promote what we already have**:** snowmobile trails, snowshoeing, x-country skiing – no need to invent anything.
- Experiences and packaging: need to create a reason for people to come.
- Promotion: Operators need to let people know they are open.

Cape Breton markets for winter are varied, based on discussions with operators. Winter visitors appear to be from many places seeking different activities:

- Winter getaways: residents from Sydney to Halifax seeking a winter getaway
- Active X-country ski, snowshoe and hiking enthusiasts.
- Travelers from abroad (Europe, Australia, NZ) who expect everything to be open
- Students/youth, small friend groups (5-12 people) seeking adventure – esp. international students seeking affordable accommodation
- Hockey tournament teams and families
- Business travelers
- Snowmobilers
- Visiting friends, relatives

8. RECOMMENDATIONS

1. **Marketing**: Consider a limited cooperative winter campaign with the key message that "***Cape Breton is open for winter business***" and using a strong social media component. Obtain buy-in from winter lodgings, food and beverage establishments and snowmobile clubs.

2. **Feature winter on the cbisland.com website "in season"** (Dec, Jan, Feb, Mar): The winter product is not prominently featured on the *cbisland.com* website, although one can search for activities – but not by season or date. This makes it difficult for visitors seeking getaways and means that people seeking winter activities, accommodations and/or restaurants need to search several websites and often telephone several places to confirm if they are open.

3. **Website search mechanism**: Create a mechanism to search the cbisland.com website by date or open season so that travelers can distinguish which operators are clearly open in winter (could be by season).

4. **Build Winter Content on the Website:** consider building a sustained, "always on" content strategy that supports and expands the effectiveness of paid media efforts. Encourage operators to help build content.

5. **Develop a Winter "App"**: that can be downloaded by winter travelers prior to visiting CBI; the App should identify properties that are open during the winter, including accommodations, activities/experiences and eating establishments.

6. **Cape Breton Highlands National Park**: Work with the Park to ensure that visitors – and locals -- know that the Park is open for business (i.e. park trails and information). Park trails should be integrated into the winter product as they have strong appeal.

7. **Update the Winter Inventory yearly**: hire someone (a student?) to make calls in early winter (November, December) to verify: a) which operations are open, and b) winter programming. The inventory provides contact information and updates will help measure winter industry growth.

8. **Clearly identify operators that are open for business as well as locations for equipment rentals**: Identify where visitors can stay, eat and obtain/rent snow-related equipment (both private and public sector: snowshoes, cross-country skis, snowmobiles).

9. **Encourage and facilitate experience development by Operators:** Facilitate development of 1-2 new signature, world class winter experiences per year for the next 3 years with the intent of motivating travel from first-time and repeat visitors. Slowly and surely build indoor experiences with unpredictable weather in mind. Consider additional outdoor experiences such as storm watching, star gazing, candlelight snowshoe walks, winter culinary opportunities such as chili

cook-offs, sweating parties etc. Engage partners through the "*World Class Experience Excellerator Program*" and Experience coaching offered by Tourism Nova Scotia.[28]

10. **Self-Guided Itineraries**: develop and post 1-day, 2-day and 3-day itineraries that identify winter possibilities for snowshoe-ers, cross-country skiers and snowmobilers.

11. **Consider targeting the niche snowmobile market**: With a market size of 20,000 in New Brunswick and 7,000 in Nova Scotia, there are opportunities to draw snowmobilers if the weather cooperates. This niche market should targeted in cooperation with SANS and operators serving this market.
    - Work with SANS and Clubs to establish counts of snowmobile visitors (permits issued) to measure market growth/decline over a three year period.
    - Promote hubs (Baddeck, Margaree, Ingonish and Cheticamp) which is where services are located and open.
    - Work with the NS Snowmobile Federation to lobby for trail access to Baddeck.
    - Assist the Federation by developing suggested one-, two- and three-day itineraries to include on both websites and using (this inventory) as a base for Self-guided Itineraries.

12. **Communities:** encourage community groups to take part in winter offerings (programming or equipment rentals), so if more of an emphasis is placed on the Winter product, community groups may become more willing to be on board.

13. **Market readiness**: Formally adopt a visitor readiness definition such as the one proposed in Section 5.
    - **Non-Motorized Trail Market Readiness:** leave trail standards and criteria to the NS trails working group (interdepartmental). Since novascotia.com is being linked to the cbisland.com website – use these trails as the ones promoted as they are considered market ready.

14. **Work with ATVNS**: to provide support for developing – long-term -- the ATV winter market, where ATV groups would take the lead. This is in part because this market does not rely on snow.

[28] http://tourismns.ca/sites/default/files/experienceexcelleratordec22_final.pdf

9. Conclusion

This report provides an assessment of the feasibility of winter tourism product development on Cape Breton Island. The report outlines

- The winter product situation in Atlantic Canada,
- Winter product market readiness criteria,
- A 2016 Inventory of winter product on Cape Breton Island, and
- An opportunity assessment and go forward recommendations for the winter product.

Should Cape Breton Island promote winter tourism? The answer is yes, with a limited budget, to encourage additional business, support operators who are open and inspire others to be open. People typically come for getaways and/or to participate in winter activities. With winter's unpredictable weather, there need to be more options for indoor activities that can serve as alternatives when there is no snow.

Appendix A: Provincial, Municipal and Stakeholder Consultations

	Location	Name	Organization & Title
1	NS	Jennifer McKeane	Tourism NS, Tourism Planning & Development Officer
2		Heather Yule	Tourism NS, Acting Manager, Development
3	NB	Margie MacKenzie	NB Dept of Tourism, Heritage & Culture
4		Emilie Comeau-Sinclair	NB Dept of Tourism, Heritage & Culture
5	PEI	Janet Wood	Manager, Product Development, PEI Dept of Economic Development & Tourism
6	NL	Carol-Ann Gillard	Director, Strategic Product Development, Dept of Business, Tourism, Culture & Rural Development
7	CBI	Kelsey Peters	Destination Cape Breton Association
8	Victoria	Vince Forrestall	Physical Activity Strategy Coordinator, Victoria County
9	Victoria	Tom Wilson	Director of Recreation/Tourism, Victoria County
10	Richmond	Jeff Stanley	Director of Tourism and Economic Development
11	CBRM	Christa Dicks	Recreation Manager, CBRM
12	Inverness	Donna MacDonald	Director of Recreation/Tourism, Mun. of the County of Inverness
13	Port Hawkes-bury	Paula Davis	Director Marketing, Recreation Tourism and Culture, Town of Port Hawkeskbury
14	Ingonish	Donald Jardine	Economic Development Society
15	Victoria	Vince Forrestall	Recreation, Victoria County
16	CBI	Mike Eddy	Snowmobilers Association of NS
17	Baddeck +	Scott MacAuley	Cape Breton Resorts
18	Northern CBI	Kelly Deveaux	Cape Breton Highlands National Park
19	Northern CBI	Graham Hudson	Keltic Lodge
20	Iona	Jill Franklin	Iona Heights Inn
21	Indian Brook	Paul Weinberg	Cabot Shores Wilderness Resort and Retreat
22	Isle Madame	Tony Pierce	Isle Madame ATV Riders

Appendix B: Market Readiness Definitions Across Canada

Area	Visitor Ready	Market Ready	Export Ready
Canada - Cdn. Signature Experiences			To be "***Export Ready" operators must fulfil many required criteria, including (broadly): 1. Proven track record and safety; 2. Support inq***uiries and reservations, 3. Market plan & budget, 4. have contracting and payments systems in place (many points within each category).
Canada: Aboriginal Cultural Experiences: National Guidelines		Businesses or experiences that have all their licenses, permits and insurance in place to operate legally; also meets or exceeds industry expectations for their sector, communicates with potential visitors year-round, and is ready to accept advanced reservations.	***Export Ready***: meets all the above criteria and is prepared to market and partner with travel trade distribution sales channels; includes understanding commission & net rate pricing plus agreeing to trade bookings and cancellation policies; experience should be adapted to the interests, language & expectations of the International market to be pursued.
Nova Scotia (NS 2013)		***Market readiness*** refers to the state of preparedness of a tourism operation, or a destination as a whole, in meeting the expectations of its customers. It refers to the whole spectrum of things affecting customer satisfaction quality of experiences, facilities and services, range of services provided, quality of customer service, information services, business policies and practices that affect the customer directly or indirectly, etc.	
New Brunswick		***Market Readiness c***riteria are developed by the Department of Tourism, Heritage and Culture(THC) to determine if a particular product is ready for visitation by the consumer. They are used in development of experiences, listings on website, in provincial publications, and highway signage.	
Ontario		MR not defined; has market readiness checklist tool which is really a business profile checklist	
Manitoba	Same as BC	Same as BC	Same as BC
British Columbia	A business which has all of their licenses, permits and insurance in place in order to operate legally.	A business that markets to potential visitors; communicates with potential visitors year round, and is ready to accept advanced reservations.	***Export Ready***: a business that markets to and through travel trade distribution sales channels, understands commission or net rate pricing, agrees to trade bookings and a cancellation policy.
Alberta			***Export ready***: ready to engage third party distributors, such as receptive tour operators, to sell your travel experience to potential visitors in international markets.