



Tourism Industry Recovery
Planning for the Halifax
Regional Municipality

Halifax Regional Integrated Tourism Master Plan

Community First Approach

Initiated in the fall of 2019, through extensive consultation this plan has established the framework for a holistic approach to advancing community economic goals through the responsible development of tourism.

Although the launch of the plan has been postponed due to COVID-19, the plan's framework is as relevant now under the current environment as it was during development.

One of the plan's primary guiding principles was a **Community-first Approach** to developing the tourism industry. This approach is the same approach we are taking with recovery planning under the COVID-19 Context.

Smart communities understand that an unforgettable experience as a visitor is the best way to attract the finest talent, a future neighbour, colleague, or friend.

And we're really good at making life-long friends. We have a reputation around the world as friendly, fun, and authentic.

Last year alone we welcomed 5.3 million overnight stays, our seventh consecutive year of growth. Visitors choose Halifax for lots of different reasons but most often, they come to visit family and friends. So as residents, we have an important role play when it comes to making a great first impression.

Together, we can experience a city that sits on the edge of nature, embraced by the ocean. We can experience the remarkable energy cheering for our sports teams. We can marvel at our award-winning architecture

and mixture of historic and modern buildings. We can sample a growing number of local breweries and distilleries and enjoy the best dining and shopping experiences in Atlantic Canada. We can also feel pride for our city and region's tremendous growth and momentum.

We've already accomplished a lot together and united under one plan we can do a lot more. We can protect our natural landscapes, improve our parks and recreational experiences, and determine what investments will make our communities better for visitors and residents.

Let's come together and make good things happen.

DISCOVER HALIFAX

DOCUMENT TITLE HERE

BACKGROUND

WHY AN INTEGRATED MASTER PLAN FOR TOURISM?

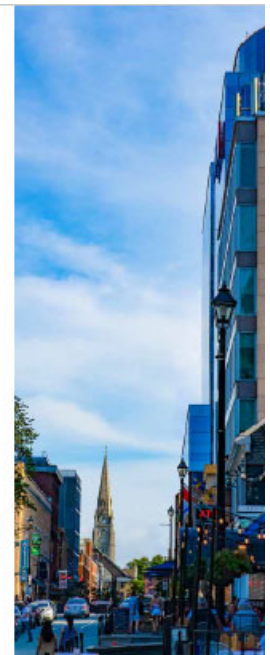
The Integrated Tourism Master Plan (ITMP) provides a vision for tourism in Halifax. Leading destinations are founded in a clear picture of where they are going and what needs to happen to achieve this, and this plan is how we will all get there, together.

Ultimately, this plan will help drive and prioritize the efforts and investments that will lead to sustainable economic growth from the region's tourism economy. And that will do one important thing: it will enrich the lives of our citizens.

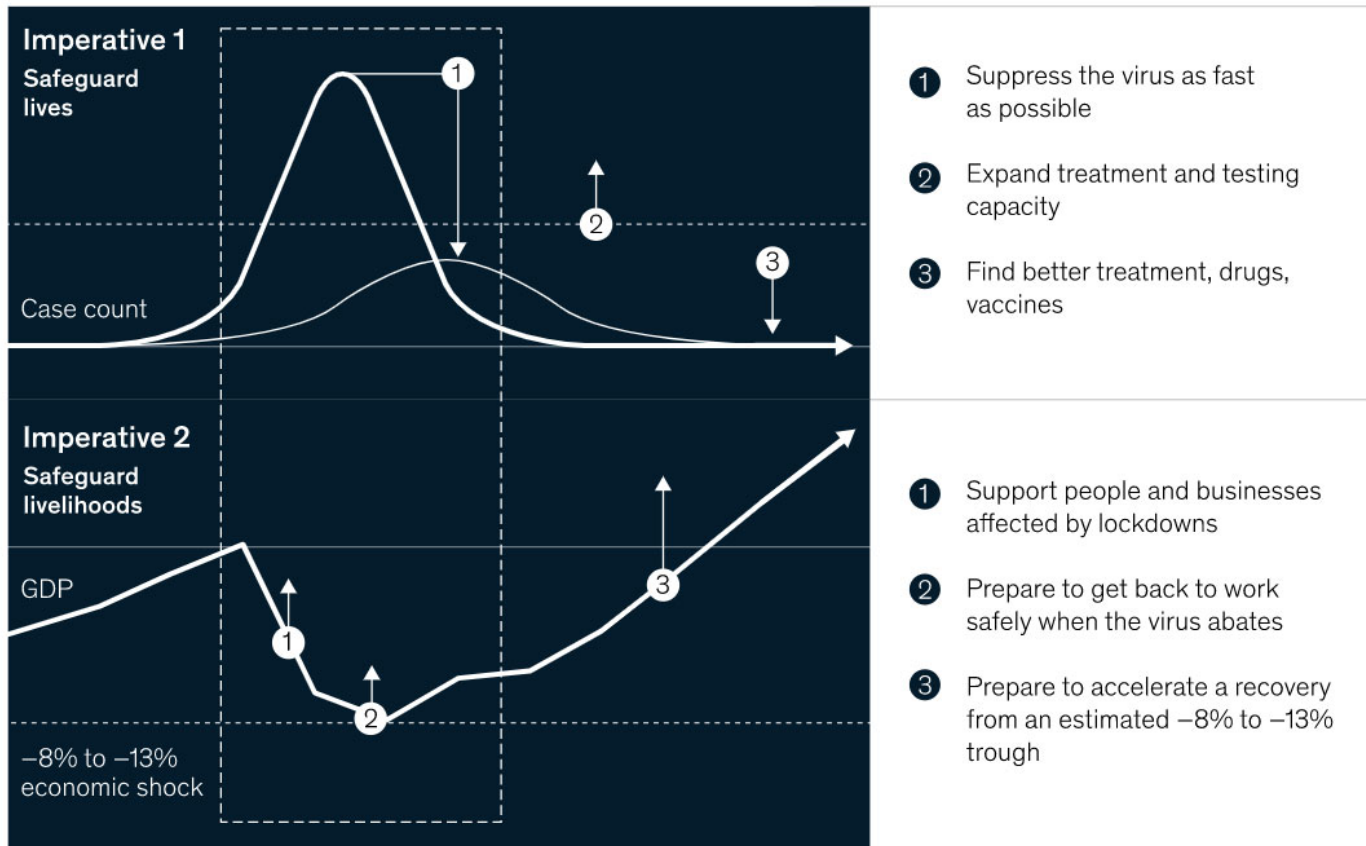
The Master Plan will anchor a shared vision and strategy for the Halifax Regional Municipality, while supporting growth and prosperity in the region through the lens of the tourism opportunity.

PLANNING CONTEXT

The Master Plan is not a plan for Discover Halifax alone, but a plan for all stakeholders and stakeholders in tourism and their main beneficiaries—those who live and work in the HRM. The plan is meant to be a framework for working toward a common goal, while still understanding that different organizations and stakeholders will have their own priorities.




Recovery Phases: Two Imperatives & Three Phases



Source: McKinsey analysis in partnership with Oxford Economics

Phase 1 – Supporting Businesses During Lockdown




DELIVERY & TAKE OUT

DINE & STAY HOME

Support local eats by ordering delivery or take out from your favourite neighbourhood restaurants, breweries, cafes and markets.

[BROWSE MENUS >](#)




SHOP ONLINE

SHOP & STAY HOME

Shop local retailers online!

[SHOP LOCAL NOW >](#)




#VIRTUALHFX

SEE & STAY HOME

Experience Halifax's most iconic landmarks and attractions from home.

[LEARN MORE >](#)



UPDATE

COVID-19 Information

Information help you to stay healthy and informed.

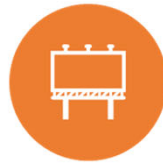
[LEARN MORE >](#)



Phase 1 - Convention & Events Sales Re-Booking

- DH sales team have contacted all event planners for 2020 and key accounts for re-booking and support needs (102 Conferences)
- DH sales team continue to prospect, and support inquires for 2021-2025 business cycles

Phase 2 –
Preparing to
Return to Work
4 Integrated
Plans



MARKETING
RECOVERY
PLAN



CONVENTIONS SALES
RECOVERY PLAN



EVENTS RECOVERY
PLAN



TRAVEL RESTRICTION
MANAGEMENT PLAN

Two Separate But Related Issues

01

Lockdowns & Mandatory Closures (Local)

- Impacts on Spending from Local Consumers
- Service economy, retail, restaurants (in part)

Likely Progression of Restrictions Easing



← May Move Back and Forth →

02

Travel Restrictions (Exports)

- Affects Spending from Visitors (Exports)
- \$1.4 billion spending affecting many different businesses to different degrees
- Likely longer problem to solve

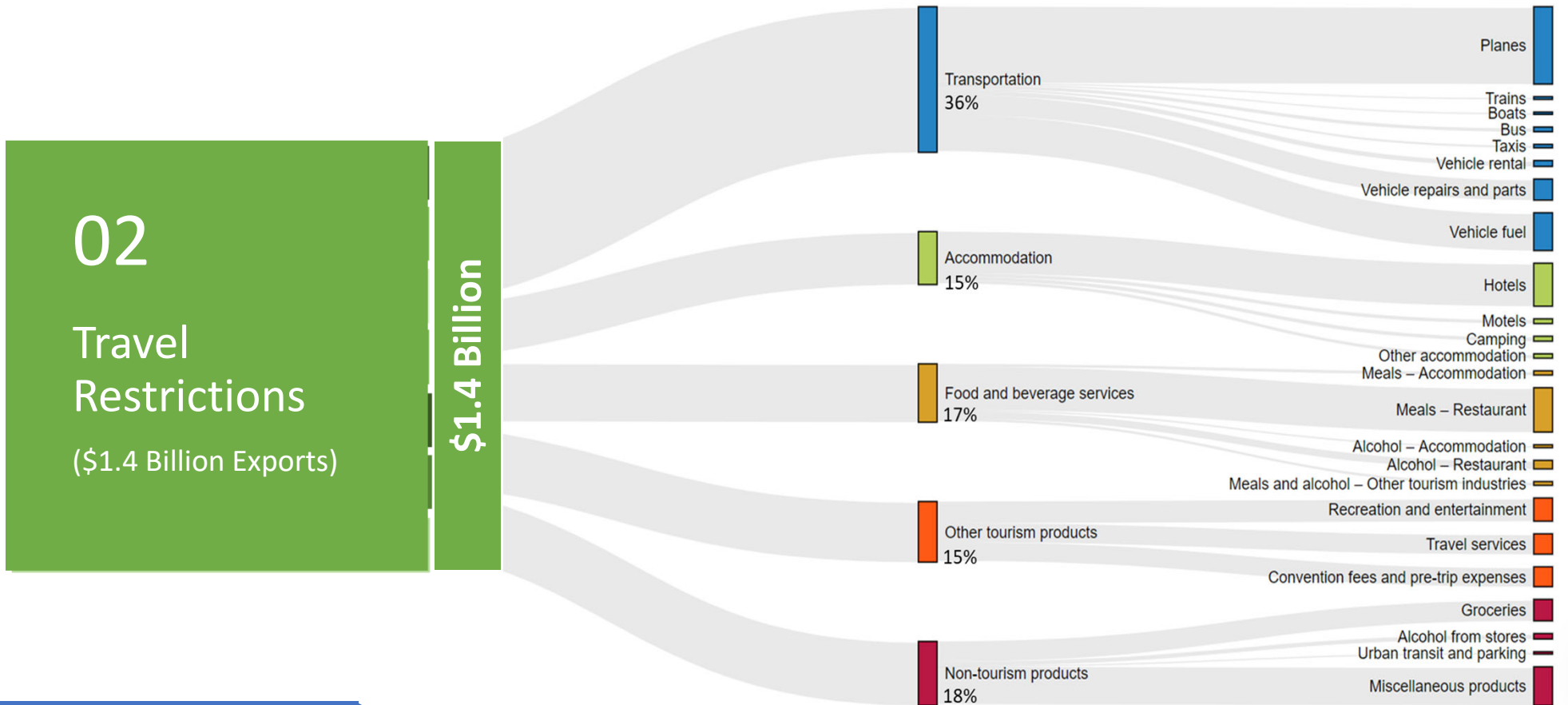
Likely Progression of Restrictions Easing



← May Move Back and Forth →

Travel Restrictions (Exports)

Tourism Expenditures by Business Type

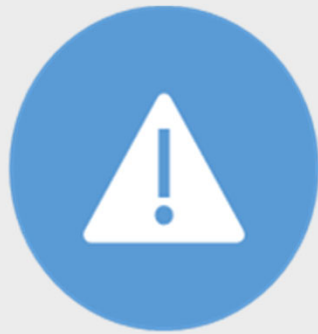


02

Travel Restrictions

(\$1.4 Billion Exports)

\$1.4 Billion



TRAVEL RESTRICTION MANAGEMENT PLAN

Objectives of the Plan

1. To support public health goals aimed to protect our community and safe travel
2. Through the development of advanced risk mitigation strategies, this plan seeks to maximize the economic benefits from the travel industry by expediting the removal of select travel restrictions
3. Using an evidence-based approach, support a managed process for the use of travel restrictions (including relaxing and/or re-introduction of restrictions based on epidemiology and situational analysis)
4. To instill confidence in the public for the management of travel in our region

Pillars

01

TRAVEL BETWEEN
SAFE MARKETS

02

DISPERSAL OF
PEOPLE AND
GROUPS IN THE
DESTINATION

03

COMMUNICATIONS
TO PROMOTE SAFE
TRAVEL AND PUBLIC
HEALTH GOALS

04

RESPONSIVE
DESIGN TO ADAPT
TO CHANGING
EPIDEMIOLOGY

Strategies

01

TRAVEL BETWEEN
SAFE MARKETS

1. Focus on Nova Scotia “Staycations” (2020)
2. Focus on Regional Maritime Drive Markets (2020)
3. Monitoring of Safe Markets for Changes in Epidemiology or Increased Risks

Strategies

02

DISPERSAL OF
PEOPLE AND
GROUPS IN THE
DESTINATION

1. Identification of potential locations where over-crowding may occur and development of mitigation strategies
2. Programming to support dispersal of visitors by geography, day of week, and time of day
3. Expansion of pedestrian spaces
4. Alignment of marketing communications to encourage dispersal of visitors by geography
5. Signage and measures to guide social distancing
6. Monitoring of public spaces and control measures to ensure social distancing

03

COMMUNICATIONS
TO PROMOTE SAFE
TRAVEL AND
PUBLIC HEALTH
GOALS

Strategies

1. Marketing campaigns to support dispersal
2. Working with Industry to promote safe messaging and visitor instructions (restaurants, hotels, etc)
3. Public Signage and Public Service Announcements

Strategies

04

RESPONSIVE
DESIGN TO ADAPT
TO CHANGING
EPIDEMIOLOGY

1. Oversight committee designed to monitor, evaluate, and implement corrective actions
2. Continued monitoring of open markets where visitors are originating from
3. Preparedness to roll back if required.



2019 Year End Results
Additional Information Slides

HALIFAX REGIONAL TOURISM MASTER PLAN



Discover Halifax launched the development of Halifax's first Integrated Tourism Master plan (ITMP) in Fall 2019. The plan will anchor a shared vision and strategy for the Halifax Regional Municipality, while supporting growth and prosperity in the region through the lens of the tourism opportunity.

Halifax City Council approved support for the plan in December 2019 recognizing that tourism can help Halifax achieve the goals laid out in its Economic Growth plan.

Community-first Approach

If we make communities better for residents, visitors will come and enjoy it, too. That's why Discover Halifax took a "community-first" approach in the development of Halifax's ITMP. We conducted extensive outreach and engagement, including:

- » A dedicated project website to inform stakeholders of the overall strategy process and to support the outreach and engagement process
- » Discussion primer and feedback form
- » Town hall sessions
- » Working sessions with industry stakeholders and sector groups
- » Bilateral interviews
- » An online survey of Discover Halifax members, broader stakeholder representatives, etc.
- » Project email address for open, unstructured input

~250
SURVEY
RESPONSES

32
ENGAGEMENT
EVENTS

300+
SESSION
ATTENDEES

INDUSTRY KEY PERFORMANCE INDICATORS

	Previous Year End (2018)	2019 Target	YTD Actual (2019)	% reached of 2019 Target	% Change from Prior Year
Room Nights Sold (Traditional Hotels)	1,413,689	1,391,401	1,464,039	105%	4%
Room Nights Sold (Online Sharing Economy)	322,596	440,000	442,867	101%	37%
Combined Overnight Room Sold	1,736,285	1,831,401	1,906,906	104%	10%
Daily Hotel Rooms Supply (measuring growth in new traditional hotels)	5,545	5,860	5,887	100%	6%
Cruise Visitation	316,859	320,000	323,709	101%	2%
Airport Enplaned / Deplaned Passengers	4,316,079	4,316,079	4,188,443	97%	-3%

Trends and Notes:

- 7th year of growth in traditional hotels (up 18% since 2013)
- Room sharing economy continues to grow (up 511% since May 2016)
- Opening of 3 new hotels in the municipality



GOAL #1 GROW LEISURE VISITATION

	Previous Year End (2018)	2019 Target	YTD Actual (2019)	% reached of 2019 Target	% Change from Prior Year
Total Impressions From Campaigns	47,511,579	47,000,000	52,809,242	112%	11%
Total Website Visits	1,092,640	1,200,000	1,275,517	106%	17%
Social Media Followers	161,487	173,000	182,873	106%	13%
Travel Media Ad Value	\$ 4,182,947	\$ 4,300,761	\$ 4,089,050	95%	-2%

Special Projects Undertaken

- Launched Handpicked Halifax Campaign including new section on website
- Partnership programs with Attractions, Downtown Dartmouth Business Commission and Tourism Nova Scotia
- Launch of Stopover Program in partnership with HIAA



GOAL #2 GROW GROUP VISITATION

	Previous Year End (2018)	2019 Target	YTD Actual (2019)	% reached of 2019 Target	% Change from Prior Year
Direct Economic Impact from Confirmed Conferences and Groups	\$ 76,832,000	\$ 76,832,000	\$ 57,668,403	75%	-25%
# of Conferences and Groups Confirming Halifax (Discover Halifax Supported)	119	119	122	103%	3%
Rooms Nights from Confirmed Groups (Discover Halifax Supported)	82,688	55,000	80,137	146%	-3%
New Tentative Bids (event count)	279	279	250	90%	-10%
New Tentative Bids (room nights)	165,154	130,000	185,337	143%	12%
Client Site Inspections Held	47	30	33	110%	-30%
Services - Delegate Websites Created	20	20	24	120%	20%

Special Projects Undertaken

- Exhibited at all major trade shows (Conventions), hosted key sales calls and activities in Toronto and Ottawa
- Promotions and Sales in partnership with Business Events Canada
- Hosting of major Familiarization Tour for Key Accounts



GOAL #3 GROW VISITOR SPEND WITH MEMBERS

	Previous Year End (2018)	2019 Target	YTD Actual (2019)	% reached of 2019 Target	% Change from Prior Year
Membership Count	398	481	471	98%	18%
Hotel Leads Issued	1,768	1,800	2,311	128%	31%
Service Leads Issued to Partners	160	160	552	345%	245%
Member Referrals Made to Clients	112	112	180	161%	61%
Visitor Guide & Maps Distribution	145,000	202,000	210,000	104%	45%
Kiosk and Wi-Fi Channel Sessions	120,000	120,000	123,231	103%	3%
Membership Satisfaction	69%	70%	58%	83%	-16%

Special Projects Undertaken

- Additional digital kiosks distributed to key locations in the HRM. Kiosks are located at Airport, Convention Centre, Cole Harbour Place, Cruise Terminal, Halifax Marriott Harbourfront & Sou'Wester Gift Shop in Peggys Cove
- Exclusive distributor of Halifax Highlights Visitor Guide in over 1,500 hotel rooms in the HRM, representing five geographical regions of the municipality

THE ECONOMIC BENEFITS OF TOURISM ARE ALL AROUND US



Marketing Halifax to visitors also attracts:
Students, Investors,
New Residents

