



P.O. Box 1749
Halifax, Nova Scotia
B3J 3A5 Canada

Item No. 12.1.1
Community Planning and Economic Development
Standing Committee
Special Meeting
January 28, 2021

TO: Chair and Members of Community Planning and Economic Development Committee

SUBMITTED BY: *-Original Signed-*

Denise Schofield, Executive Director, Parks and Recreation

-Original Signed-

Jacques Dubé, Chief Administrative Officer

DATE: January 11, 2020

SUBJECT: Halifax Regional Integrated Tourism Master Plan

ORIGIN

- December 3, 2019 approved motions:
 - THAT Halifax Regional Council approve a contribution of \$50,000 towards the development of a Regional Destination Development Plan by Discover Halifax, and
 - THAT Halifax Regional Council endorse the development of a Regional Destination Development Plan by Discover Halifax.
- Completion by Discover Halifax of an Integrated Tourism Master Plan for Halifax.
- September 29, 2020 approved motion THAT Halifax Regional Council ... 5. Request a staff report regarding the Mayor also ask the Province to amend the Marketing Levy Act to allow for a possible increase to the maximum marketing levy as described in the letter received from Discover Halifax on September 28, 2020.

LEGISLATIVE AUTHORITY

The *Halifax Regional Municipality Charter* 2008, c. 39, s. 1 permits the municipality to undertake a variety of economic development activities.

The *Halifax Regional Municipality Marketing Levy Act* permits the municipality to impose a levy to be used to promote the municipality as a tourist destination.

...RECOMMENDATION ON PAGE 2

RECOMMENDATION

It is recommended that Community Planning and Economic Development Standing Committee recommend that Regional Council:

- 1) endorse the Halifax Regional Integrated Tourism Master Plan (Attachment 1) presented by Discover Halifax and the municipality's related responsibilities as noted in the body of this report;
- 2) direct the CAO to work with Discover Halifax to provide annual updates to Council on the Halifax Regional Integrated Tourism Master Plan;
- 3) direct the CAO to negotiate a new Services Agreement with Discover Halifax to reflect an expanded role for Discover Halifax that includes destination development, with the scale and scope of activity contingent on funding levels from all sources, including operational funding from HRM subject to budget approval;
- 4) request the Mayor write to the Province of Nova Scotia requesting amendments to the *Halifax Regional Municipality Marketing Levy Act* to remove the cap on the marketing levy; and
- 5) direct the CAO to negotiate a memorandum of understanding with the Hotel Association of Nova Scotia in advance of any changes to the marketing levy.

BACKGROUND

Tourism can be defined as the activities of people traveling to and staying in places outside their usual environment for leisure, business or other purposes for not more than one consecutive year. From a policy perspective, tourism development includes governments, community and private sector efforts to increase tourist visitation and spending. Conventions, festivals, sporting events, cruise ships, air travel, out-of-province marketing, local tours, and other assets and efforts play a role in attracting tourists to Halifax.

Halifax Regional Municipality (HRM) is a significant tourism stakeholder in the Halifax region. It owns the Scotiabank Centre, a concert, sports, and special events venue in downtown Halifax with a 10,000+ seating capacity. HRM is also a 50% shareholder in the corporation that operates the Halifax Convention Centre. Furthermore, through a tax agreement, HRM provides tax relief to the Halifax International Airport Authority which operates the Halifax Stanfield International Airport. HRM also provides funding to attract and host large-scale sporting and tourism events that create significant economic impacts, promote Halifax as a diverse event destination, and attract tourists for multi-day visits. HRM also provides operational support to Discover Halifax (DH) to promote the municipality as a year-round destination of choice for business and leisure travelers. More broadly, municipal activities across business units including transit, transportation and public works, planning and development, and parks and recreation, among others, can have a significant impact on tourism.

The visitor economy represents approximately 5.3 million overnight stays per year and \$1.3 billion in spending by visitors in the municipality. Visitation in HRM represents approximately 54% of the total visitation in the province and there are approximately 4,000 businesses and 34,000 jobs associated with the sector in the municipality (source: Discover Halifax 2019 Annual Report).

Through late 2019 and early 2020, Discover Halifax (DH) led the development of a tourism master plan. The primary purpose of this plan is to help prioritize efforts and investments related to tourism to increase economic growth. It is meant to align strategic direction of a range of tourism partners. Regional Council endorsed the development of a tourism master plan, provided in-kind support through staff participation and contributed \$50,000 to the project. The Discover Halifax board of directors provided oversight on the plan development, and the project team included tourism consultants, HRM and DH staff and a community advisory committee. The community advisory committee included both political and staff representation

from HRM and provided feedback on the plan and its development. The engagement process included a dedicated project website, discussion primer and feedback form, town hall sessions, industry and sector working sessions, one on one interviews, an online survey sent to Discover Halifax members and a wider group of stakeholders, and a project email address that provided a venue for those who wished to provide unstructured feedback. Overall there were 32 engagement events, more than 300 people attended the various sessions, and 250 respondents to the online survey.

The Halifax Regional Integrated Tourism Master Plan (Integrated Tourism Master Plan) was completed just prior to Covid-19 restrictions being put in place and the breadth and severity of the impact of Covid-19 on the tourism industry being realized.

DISCUSSION

Key Findings, Vision and Strategic Themes

One of the foundational elements of the Integrated Tourism Master Plan is the importance of taking a “community first approach.” This is both a principle and a goal of the plan and was a key theme that emerged from the engagement. It is also a lens through which each of the strategic themes is analyzed.

The key findings of the master plan are:

- Tourism is one of the fastest growing industries in the world
- Halifax has the potential to be widely recognized as the favourite city in Canada
- Maximize our full potential for year-round visitation
- If we make Halifax an even better destination for visitors, it will also be better for residents
- Halifax’s greatest assets are our people and the unique combination of rural and urban experiences
- Discover Halifax stakeholders are eager to partner and collaborate under clear leadership

The vision of the master plan is to be widely recognized as the favourite city in Canada. The goals of the plan align to the Halifax economic growth strategy and are to:

- Grow tourism revenues
- Grow tourism employment
- Enrich the lives of residents
- Align with related strategies

The strategic themes of the plan are:

- Build and enhance Halifax’s key demand generators
- Make it easy to get here and visit
- Develop responsible tourism
- Attract highest yield and growth markets
- Be vibrant and alive, 365
- Establish, identify, and appoint tourism leadership

The plan identifies a number of strategic initiatives associated with each of the above noted strategic themes. While the municipality may play an indirect role in many of them, there are a number for which the municipality is lead or one of the lead organizations responsible. Each of the initiatives in which the municipality is identified as a lead is listed below, together with a comment or status update for those where the municipality is already active.

It is intended that the strategic initiatives will be evaluated on an on-going basis not only to track progress but also to consider whether amendments/additions or deletions to the list are merited.

Covid-19

The tourism industry is one of the hardest hit by restrictions associated with Covid-19. As reported in September 2020 in the [Covid-19 Economic Response and Recovery Plan Update](#) by the Halifax

Partnership, data from Discover Halifax showed total rooms sold since the pandemic were down 73%¹ compared to 2019, hotel revenues were down 82.5% from the prior year (as of end of August), visitation to the Halifax region was estimated to be down between 1 and 1.5 million overnight stays from 2019 and visitor spending is estimated to be reduced by \$900 million compared to prior years. In order to help position the industry for recovery, Discover Halifax led the development of the [Halifax Region Tourism Opening Plan](#). The Tourism Opening Plan's objectives are to adopt and support public health goals, to maximize economic benefits from the travel industry by expediting the reopening of safe travel through adoption of epidemiological and risk mitigation best practices, to articulate a process for re-establishing a quarantine-free travel zone between Nova Scotia and other safe markets, and to instill public confidence that the tourism and travel industry is being proactive as it relates to personal safety and the health of our communities. The Tourism Opening Plan articulates the steps being taken in the destination to create and ensure safe spaces. The Tourism Opening Plan speaks to near term actions and interventions to support tourism re-opening and recovery. Discover Halifax has reviewed the Integrated Tourism Master Plan in the changed context resulting from Covid-19. Their review, together with stakeholder consultation, indicate that the Integrated Tourism Master Plan remains a valid plan to support not only long-term tourism industry development but also short and medium term Covid-19 recovery. The Integrated Tourism Master Plan serves as phase 3 of the Discover Halifax Covid Recovery Plan with the objective of building back better.

Strategic Initiatives

Below is a listing of the proposed strategic initiatives identified in the Integrated Tourism Master Plan in which the municipality plays a lead or significant role along with a comment on the status of the work. In many cases these initiatives reflect on-going work by HRM. In others, new activity or investment is required by the municipality.

Return on Investment

Initiative: Create an Investment Filter to Assess the Tourism Impacts of Proposed Investments

Lead: Discover Halifax; *Partner:* Halifax Regional Municipality

Comment/status: The municipality could benefit from increased analytical capacity to ensure tourism impacts of proposed investments are accurately identified. Discover Halifax has developed an investment filter and it is available for future analysis. Use of and improvements to proposed filter are proposed to be discussed during the renewal of Discover Halifax's Services Agreement.

Enhance Demand Generators

Initiative: Implement the Wild Islands Plan

Lead: Wild Islands Tourism Advancement Partnership (WITAP); *Partner:* Halifax Regional Municipality

Comment/status: The municipality has supported the 100 Wild Islands project both with funding (\$300,000 grant to Nova Scotia Nature Trust for the 100 Wild Islands Campaign and the less the market value sale of land for a property within the 100 Wild Islands); and in-kind support from the municipality and Halifax Partnership in the form of participation in the WITAP. The municipality will continue to respond to requests for support as they arise.

Enhance Demand Generators

Initiative: Enhance Demand Generators for the Designated Arts District, Entertainment District, Heritage Conservation Districts

Lead: Halifax Regional Municipality

Comment/status: The municipality has established three Heritage Conservation Districts, Barrington, Schmidville and Old South Suburb. On November 17, 2020 Council approved

¹ The amount of levy collected from January -September 2019 was \$3.23M compared to \$934K for the same period in 2020.

the prioritization of new Heritage Conservation Districts and a revised public participation program to support the development of heritage conservation districts. The concept of designated arts and entertainment districts is being considered within the overall development of the Culture and Heritage Priorities Plan.

Demand Generation - Events

Initiative: Create two events including a signature event

Lead and/or Partner: Halifax Regional Municipality or Discover Halifax

Comment/status: Aside from the direct delivery of a core number of civic events, the municipality's role with respect to events development is primarily to enable events through funding support or guidance with respect to meeting regulatory requirements. The municipality may play a role in supporting new events with some components of additional direct event delivery as was the case with municipal participation in the Evergreen Festival. The municipality can further support through municipal support of Discover Halifax, including support to Discover Halifax in the role of events leadership (see below).

Dartmouth Waterfront – Disperse Visitation

Initiative: Create a community-led vision for the Dartmouth waterfront to disperse visitation and potentially include a cruise dock

Lead: Halifax Regional Municipality, Develop Nova Scotia

Comment/status: The municipality will work with stakeholders to explore the opportunity to better connect the Dartmouth waterfront to the downtown and harbour areas.

Competitive Event Venue – Canoe Kayaking

Initiative: Enhance the Canoe Kayaking Competition Facility on Lake Banook

Lead: Halifax Regional Municipality

Comment/status: On September 1, 2020, Halifax Regional Council approved a grant of \$700,000 (split between 2020/2021 and 2021/2022) to the Canoe '22 Society/Atlantic Division Canoe Kayak Canada contingent on similar funding from other orders of government, as capital funding towards the Judges Tower, Return Lane, and Accessible Docks. This funding is in addition to \$800,000 in event funding for Canoe 22, regular municipal support to the Atlantic Division Canoe Kayak Canada, and planned municipal improvements to the seating, pathways, general access and landscaping at Silvers Hill Park and improvements to support the athlete's village at Birch Cove Park. 2021/2022 funding will be considered as part of the upcoming budget process.

Waterfront Art District

Initiative: Develop the new Waterfront Art District as a place for everyone to experience Nova Scotia Art and Culture

Lead: Art Gallery of Nova Scotia, Develop Nova Scotia, Halifax Regional Municipality

Comment/status: The concept of designated arts and entertainment districts is being considered within the overall development of the Culture and Heritage Priorities Plan.

Outdoor Performance Infrastructure

Initiative: Complete a Needs Analysis for Additional/Enhanced Outdoor Performance Venues

Lead: Halifax Regional Municipality

Comment/status: It is recommended that HRM staff work with Discover Halifax towards completion of a needs analysis for outdoor performance venues.

Demand Generation - Events

Initiative: Establish an “Events Attraction Office” and implement the recommendations of the STAT Pro Report

Lead: Halifax Regional Municipality/Discover Halifax

Comment/status: Over the past several years, the municipality has worked with tourism and events stakeholders to develop a more strategic approach to event bidding and hosting. A report has been prepared by staff and is anticipated to be before Council in the coming weeks that summarizes the research completed, detailed analysis and recommendations with respect to a new event attraction model. This report also describes the financial request made by the Hotel Association of Nova Scotia (HANS) in order to support expanded activity in the area of event attraction.

HANS had previously advocated through the municipality for an increase to the marketing levy. These earlier discussions with HANS were predicated on the municipality providing increased operating funds at comparable levels to the increase in the levy (i.e. \$1.5 m increase to the levy matched with \$1.5m in increased operating funds from the municipality). Staff are engaging in discussions with HANS related to potential increases in the marketing levy. In a comparison of 23 Canadian jurisdictions Halifax has the lowest hotel tax.

The need for increased funds to support the tourism industry through support to Discover Halifax is also discussed below in the strategic initiative related to Discover Halifax as the backbone organization for the Integrated Tourism Master Plan.

Finally, the municipality considered the marketing levy as a potential source of funds for a proposed CFL stadium, which created uncertainty with respect to a levy increase to support Discover Halifax. Given the intense needs of the tourism industry at this time of Covid-19 impacts and impending recovery, it is recommended Council proceed to request that the Province remove the cap on the marketing levy to support the request of Discover Halifax and HANS.

The upcoming report will address this initiative in greater detail.

Provide New Opportunities for Visitors to Get Here and Get Around

Initiative: Adopt Ride-Hailing Services

Lead: Halifax Regional Municipality

Comment/status: On September 22, 2020 Council approved [by-law amendments](#) to permit Transportation Network Companies to operate in Halifax. These amendments took effect November 1, 2020.

Provide New Opportunities for Visitors to Get Around – Disperse Visitation

Initiative: Action the Halifax Rapid Transit Plan

Lead: Halifax Regional Municipality

Comment/status: Approved by Council May 26, 2020, the [Halifax Rapid Transit Strategy](#) is the municipality’s plan to build a Rapid Transit system by 2030. The Strategy establishes a Bus Rapid Transit (BRT) Network, proposes new ferry service, and sets a direction for land use policy to align with Rapid Transit.

Short Term Rentals

Initiative: Support policy process through the Inclusive Economic Growth Model for Short-term rentals

Lead: Halifax Regional Municipality

Comment/status: At the meeting of September 29/30, 2020, Council initiated next steps with respect to [Short Term Rentals](#). The proposed next steps will focus on establishing clear and consistent land use planning and business registration requirements for all areas of HRM. Amendments to the Regional Plan may also be needed to provide region wide objectives and policy guidance. New and updated regulations will be intended to support the tourism industry and residents' participation in the sharing economy, while also reducing negative impacts on long-term housing supplies and residential neighbourhoods.

The September 2020 staff report on Short Term Rentals included a recommendation to request of the Province of Nova Scotia an amendment to the *Halifax Regional Municipality Marketing Levy Act* to extend collection of the levy to accommodations with fewer than 20 rooms. In response to this recommendation, Discover Halifax wrote the Mayor and members of Council, requesting that the municipality's request to the Province also include a request to remove the current cap on the marketing levy that limits it to 2% of the purchase price of the accommodation (Attachment 2). The Hotel Association of Nova Scotia (HANS) as recently as January 4, 2021, wrote to Bernie Miller, Deputy Minister of the Department of Business, also requesting a removal of the cap on the marketing levy (Attachment 3).

Visitor Services – Disperse Visitation

Initiative: Increase the Availability of Public Washrooms Throughout Region

Lead: Halifax Regional Municipality

Comment/status: At their meeting of September 29/30, 2020 Council approved a [washrooms and drinking fountain strategy for parks](#). The strategy outlines policy and design recommendations and an action plan for the municipality in considering the planning, recapitalization, and installation of facilities in parks. Council directed the development of annual business plans for washrooms and drinking fountain projects for consideration in the annual capital budgets on the basis of a budget that would see investments and upgrades over the coming 14 years.

The above staff report also notes the need for washrooms and drinking fountains beyond recreational needs in parks though it did not specifically identify the needs of tourists, the potential for future work by the municipality to address the need for washrooms and drinking fountains in a broader context was noted. There is potential to identify other partners not currently identified in the ITMP such as private businesses.

Low Season Stimulus – Meetings and Conventions

Initiative: Develop an incentive program to attract strategic conferences in low season

Lead: Halifax Regional Municipality/Discover Halifax

Comment/status: It is recommended that HRM staff work with Discover Halifax to develop options for low season convention incentives and that this be considered through the services agreement.

Integrated Tourism Master Plan - Execution and Governance

Initiative: Evolve Discover Halifax to become the backbone organization for Integrated Tourism Master Plan

Lead: Halifax Regional Municipality

Comment/status: Page 8 of the Integrated Tourism Master Plan describes the collective impact model. It describes how many stakeholders and organizations need to work together in order to move forward the strategic initiatives of the plan and ultimately for the community to realize the benefits of the plan. While many organizations need to contribute to this work, in order for the plan to be successfully implemented, a backbone organization is required to coordinate activity, promote accountability among stakeholders, measure results and mobilize resources towards the goals of the plan. Discover Halifax is well positioned but inadequately resourced to perform this role.

Relatedly, with the development of an Integrated Tourism Master Plan, Discover Halifax is fulfilling a need for destination management in Halifax. Discover Halifax's primary focus historically has been on destination marketing. By definition, destination marketing organizations provide destination marketing but many provide a much wider range of services depending on the local need and context.² Currently no single organization has responsibility for destination management for the municipality. The UN World Tourism Organization (UNWTO) describes destination management as:

the coordinated management of all the elements that make up a tourism destination. Destination management takes a strategic approach to link-up these sometimes very separate elements for the better management of the destination.

The UNWTO also recognizes the trend of organizations traditionally involved in the destination marketing of a location broadening their mandates to include destination management.

Next Steps

As noted, many of the strategic initiatives are underway and will continue to be actioned with updates and reports on specific initiatives will be provided to Regional Council as warranted. In addition, the recommended update to the Service Agreement between HRM and Discover Halifax will incorporate these strategic initiatives and respective responsibilities.

In terms of implementation of the strategic initiatives, which are related to an expanded mandate, for Discover Halifax such an expanded mandate is logical but challenging from a resource perspective. Cross jurisdictional review indicates that Discover Halifax lags behind other Destination Management Organizations of similar sized and even smaller cities in terms of funding. In a benchmarking study from 2016, the average budget for destination marketing organizations was \$7.4m compared to a budget of \$2.5m for Discover Halifax. In a comparison of 10 Canadian cities, Discover Halifax has the lowest budget on a per room basis. Some of the difference in funding levels is due to the fact that other destination marketing organizations provide a wider range of services than Discover Halifax, however, Discover Halifax overall budget also benchmarks lower than others with a comparable service set. Current funding levels constrain the extent to which Discover Halifax can meet current functions including destination marketing and branding, additional functions such as destination management and events attraction will require additional funds. Destination management is a substantially new function for the organization with the Integrated Tourism Master Plan, but is an important shift for the municipality to keep pace with changes to the tourism sector. In addition, the potential, as noted above, of Discover Halifax taking on a leadership role with respect to events attraction carries with it requirements for resources. Finally, Covid-19 has reduced Discover Halifax's revenues at the same time as intensifying the need to be prepared to capture visitors as safe travel is able to restart.

Therefore, a pressure of \$250,000 will be identified to Council during the 2021/22 budget process that if funded as on-going operating funding to Discover Halifax, could begin to address some of the above noted challenges. If approved, the specific use of funds would be identified through the negotiation of the updated services agreement with Discover Halifax.

² See for example, slide 49, Organizational Functions and Responsibilities, The Future of Tourism Funding: DMO Data & Perspectives, by Destination Analysts.

FINANCIAL IMPLICATIONS

An additional \$250,000 in operating funding support for Discover Halifax is identified as a budget pressure in the upcoming 2021/22 budget. Any individual initiatives requiring funding would be brought forward independently for Council consideration. The current operational support (not including the levy) is \$386,600. HRM also flows \$6,400 to Destination Eastern and Northumberland Shore through Discover Halifax that is in addition to that amount. Four-year financial implications shown below do not show increases at this time, however, future increases to operational funding for Discover Halifax are expected. Requested increases will be identified brought to Council as discussions evolve on the role of Discover Halifax, the marketing levy and other potential funding sources.

Fiscal Year	2020/21	2021/22	2022/23	2023/24
Operating - Cost Centre	393,000.00	643,000.00	643,000.00	643,000.00

RISK CONSIDERATION

Risks associated with endorsement of the Integrated Tourism Master Plan are low. An Integrated Tourism Master Plan helped to identify strategic risks in the area of tourism. There is a risk that some aspects of the plan may be constrained from a resourcing perspective due to Covid-19 and would have to be deferred or reduced in scope. Some plan goals, such growing tourism revenues and employment are also at risk due to Covid 19.

COMMUNITY ENGAGEMENT

Stakeholder engagement was undertaken by Discover Halifax in the course of the development of the Integrated Tourism Master Plan; this engagement is described in the discussion section of this report.

ENVIRONMENTAL IMPLICATIONS

One of the strategic themes of the Integrated Tourism Master Plan is to Develop Responsible Tourism. This theme speaks to actively protecting our environment. Related strategic initiatives include for example, actioning the Halifax Rapid Transit Strategy and development a plan for managed growth of the cruise sector.

ALTERNATIVES

Community Planning & Economic Development Standing Committee may recommend that Regional Council

- 1) not endorse the Integrated Tourism Master Plan and the municipality's related responsibilities as noted in the body of this report.
- 2) not direct the CAO to negotiate a Services Agreement with Discover Halifax. This would result in the existing role of Discover Halifax remaining in place and would require HRM and other organizations to lead more of the strategic initiatives from the Integrated Tourism Master Plan.

- 3) not request the Mayor write to the Province of Nova Scotia requesting amendments to the *Halifax Regional Municipality Marketing Levy Act* to remove the cap on the marketing levy until staff return with the subsequent report on the event bidding approach.
- 4) defer decision on the negotiation of a memorandum of understanding with the Hotel Association of Nova Scotia in advance of any changes to the marketing levy until staff return with the subsequent report on the event bidding approach.

ATTACHMENTS

Attachment 1: Integrated Tourism Master Plan

Attachment 2: Discover Halifax Letter to Mayor Savage and Regional Council

Attachment 3: HANS Letter to Mr. Bernie Miller

A copy of this report can be obtained online at halifax.ca or by contacting the Office of the Municipal Clerk at 902.490.4210.

Report Prepared by: Maggie MacDonald, Manager, Regional Recreation Services, Parks and Recreation,
902.490.6252



HALIFAX REGIONAL INTEGRATED TOURISM MASTER PLAN



A vibrant sunset over a city skyline reflected in water. The sky is filled with dramatic, colorful clouds in shades of orange, pink, and blue. The city skyline, featuring various high-rise buildings, is visible in the background, with its lights reflecting on the calm water in the foreground.

TABLE OF CONTENTS

SECTION ONE: INTRODUCTION	4
SECTION TWO: KEY FINDINGS	16
SECTION THREE: RECOMMENDATIONS	24
SECTION FOUR: CONTRIBUTORS	32
SECTION FIVE: DEFINITIONS	36
APPENDIX A: PRIORITY & IMPLEMENTATION	38

SECTION ONE

INTRODUCTION

WHEN WE COME TOGETHER, GOOD THINGS HAPPEN.

We all have a role to play in helping make this incredible city known as Halifax—on the ancestral land of the Mi'kmaq known as Kjiptuk—be widely recognized as the favourite city in Canada. This document outlines how we can make this possible, together.

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.

In 2019 alone we welcomed 5.3 million overnight stays, our seventh consecutive year of growth. Visitors choose Halifax for lots of different reasons, and as residents we have an important role to play when it comes to making a great first impression.

While COVID-19 caused a significant drop in business in 2020, Halifax's tourism opportunity remains strong over the medium to long term. Halifax can emerge from the downturn as a destination for the future.

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. Let's make decisions for tourism recovery that make Halifax an even better place to live and visit.

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 recovery and future sustainable economic growth from the region's tourism economy. And that will do one important thing: It will enrich the lives our citizens.

ITMP 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

ITMP is not a plan for Discover Halifax alone, but a plan for all shareholders and stakeholders in tourism and their main beneficiaries—those who live and work in the Halifax Regional Municipality. 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. This was taken into consideration by incorporating elements of a number of relevant plans and priorities, including the following:

Halifax Regional Municipality Regional Plan

The Regional Plan establishes long-range, region-wide planning policies outlining where, when, and how future growth and development should take place between now and 2031.

Relevant Halifax Regional Municipality Plans & Reviews

There are numerous relevant plans and policies for Halifax Regional Municipality catalogued through the development of the Halifax ITMP, including (but not limited to):

- » Centre Plan
- » Climate Change Plan
- » Short-Term Rental Review
- » Ride Sharing Review
- » Cogswell Street Interchange
- » African Nova Scotian Economic Action Plan
- » The Halifax Region Tourism Reopening Plan

Halifax Economic Growth Plan – Halifax Partnership

Of particular significance to the ITMP, the Economic Growth Plan highlights the importance of tourism in both the rural and urban areas of the Halifax Regional Municipality.

Develop Nova Scotia Priorities

Develop Nova Scotia (DNS) is the province's crown corporation with responsibility for the development of strategic economic infrastructure to support inclusive economic growth in Nova Scotia. Accordingly, DNS will be a key partner in advancing the ITMP.

Placemaking Strategies

The concept of place as a catalyst for economic development is central to DNS's strategic planning. At its most basic, a place is a space or location that has meaning for people. The stronger the meaning, the better the place. Accordingly, DNS sees placemaking as an imperative which is also critical to growing Halifax's destination appeal.

Gateway to Canada Airport Strategy

Halifax Stanfield is a core component of the Atlantic Gateway, connecting Atlantic Canada to the world via air transport and a key partner for the ITMP.

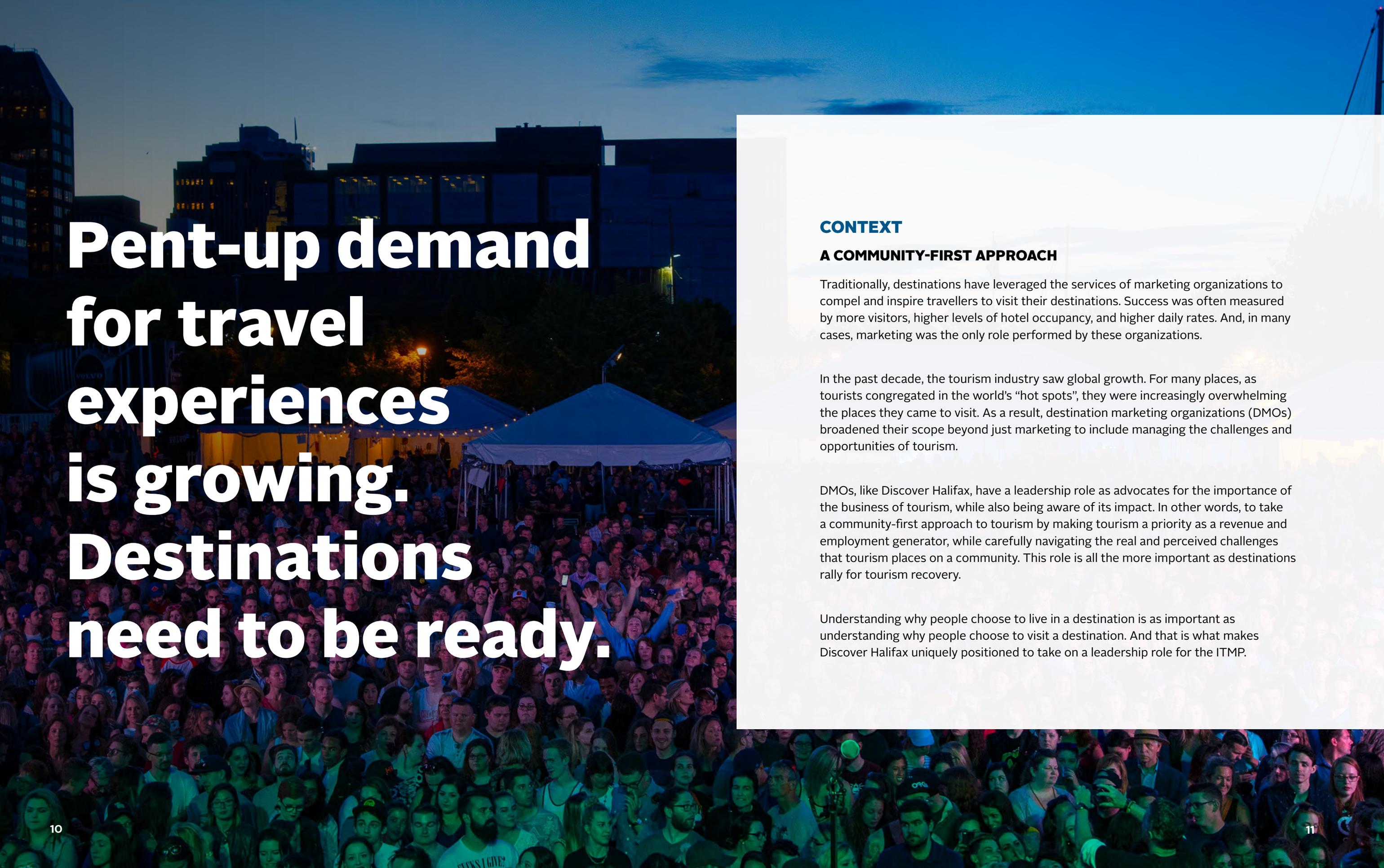


Driving Export Revenue With Tourism Nova Scotia

Tourism Nova Scotia (TNS) is a private, sector-led provincial crown corporation that partners with destinations and small businesses to develop, enhance and market tourism resources aiding to create unique high-quality visitor experiences. TNS also provided essential research and insights in the development of the ITMP.

Events East – Looking Forward Five-Year Strategy

With an emphasis on developing significant homegrown events and extending the calendar beyond the peak season, while leaving a positive social impact on communities across the province, the events strategy aligns well with the Halifax ITMP.



Pent-up demand for travel experiences is growing. Destinations need to be ready.

CONTEXT

A COMMUNITY-FIRST APPROACH

Traditionally, destinations have leveraged the services of marketing organizations to compel and inspire travellers to visit their destinations. Success was often measured by more visitors, higher levels of hotel occupancy, and higher daily rates. And, in many cases, marketing was the only role performed by these organizations.

In the past decade, the tourism industry saw global growth. For many places, as tourists congregated in the world's "hot spots", they were increasingly overwhelming the places they came to visit. As a result, destination marketing organizations (DMOs) broadened their scope beyond just marketing to include managing the challenges and opportunities of tourism.

DMOs, like Discover Halifax, have a leadership role as advocates for the importance of the business of tourism, while also being aware of its impact. In other words, to take a community-first approach to tourism by making tourism a priority as a revenue and employment generator, while carefully navigating the real and perceived challenges that tourism places on a community. This role is all the more important as destinations rally for tourism recovery.

Understanding why people choose to live in a destination is as important as understanding why people choose to visit a destination. And that is what makes Discover Halifax uniquely positioned to take on a leadership role for the ITMP.

ENGAGEMENT PROCESS

Ensuring there was comprehensive input was critical to development of the plan and what guided the engagement process. Activities to ensure extensive outreach and engagement included:

- » 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



300+

SESSIONS ATTENDEES



32

ENGAGEMENT EVENTS

COVID-19

Destinations have experienced environmental disasters and epidemics in the past, but never has the tourism sector been grounded to the extent it has with the COVID-19 pandemic. The scope and scale of the impact of the current health crisis on the economy broadly—and tourism in particular—is unprecedented.

The Halifax ITMP was completed just prior to the economic upheaval resulting from the COVID-19 pandemic. Although the strategic tenets of this plan were designed to be enduring and will continue to be relevant, the context has obviously changed profoundly.

Recognizing that economic recovery will be the priority beyond the urgent health crisis, the essential question is, how does the ITMP fit into a go-forward strategy to advance through a recovery phase.

Fortunately, the Halifax ITMP was delivered and endorsed immediately prior to recognition of the severity of COVID-19, providing a foundation to move forward. The ITMP is based on comprehensive input from a wide variety of sources—community leaders, strategic partners, business, industry associations, educators, and citizens. As the report was finalized and its findings and conclusions discussed and tested, there was a strong consensus for the proposed future directions.

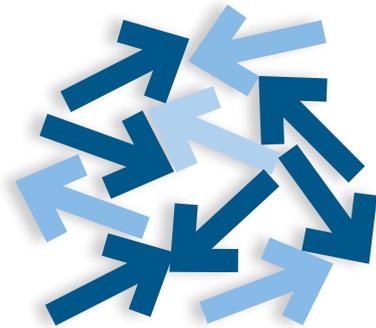
Sector leaders, such as Discover Halifax, will play a crucial role in business stabilization and recovery efforts post-COVID-19.



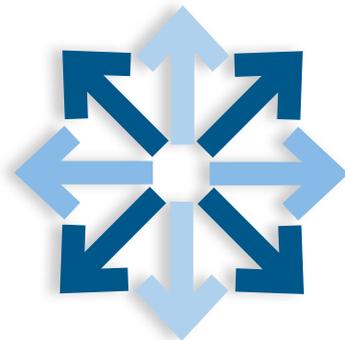
COLLECTIVE IMPACT

With so many organizations and perspectives at the table when it comes to tourism, it was important to ensure this plan was being approached from a high-level perspective of the collective impact.

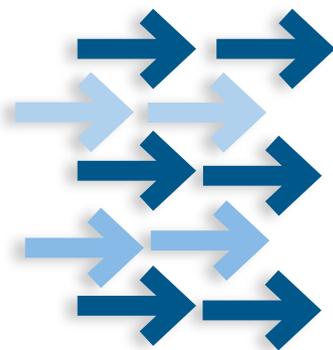
This plan is meant to be a strategic plan that numerous stakeholders and organizations can rally around to unify efforts to ensure we're all working together toward common goals and objectives. The theory behind this is rooted in the Stanford Collective Impact model as outlined in the following graphic.



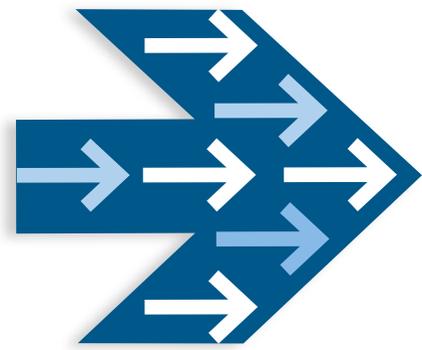
DISORDER & CONFUSION



INDIVIDUAL IMPACT
In isolation



COORDINATED IMPACT
With alignment



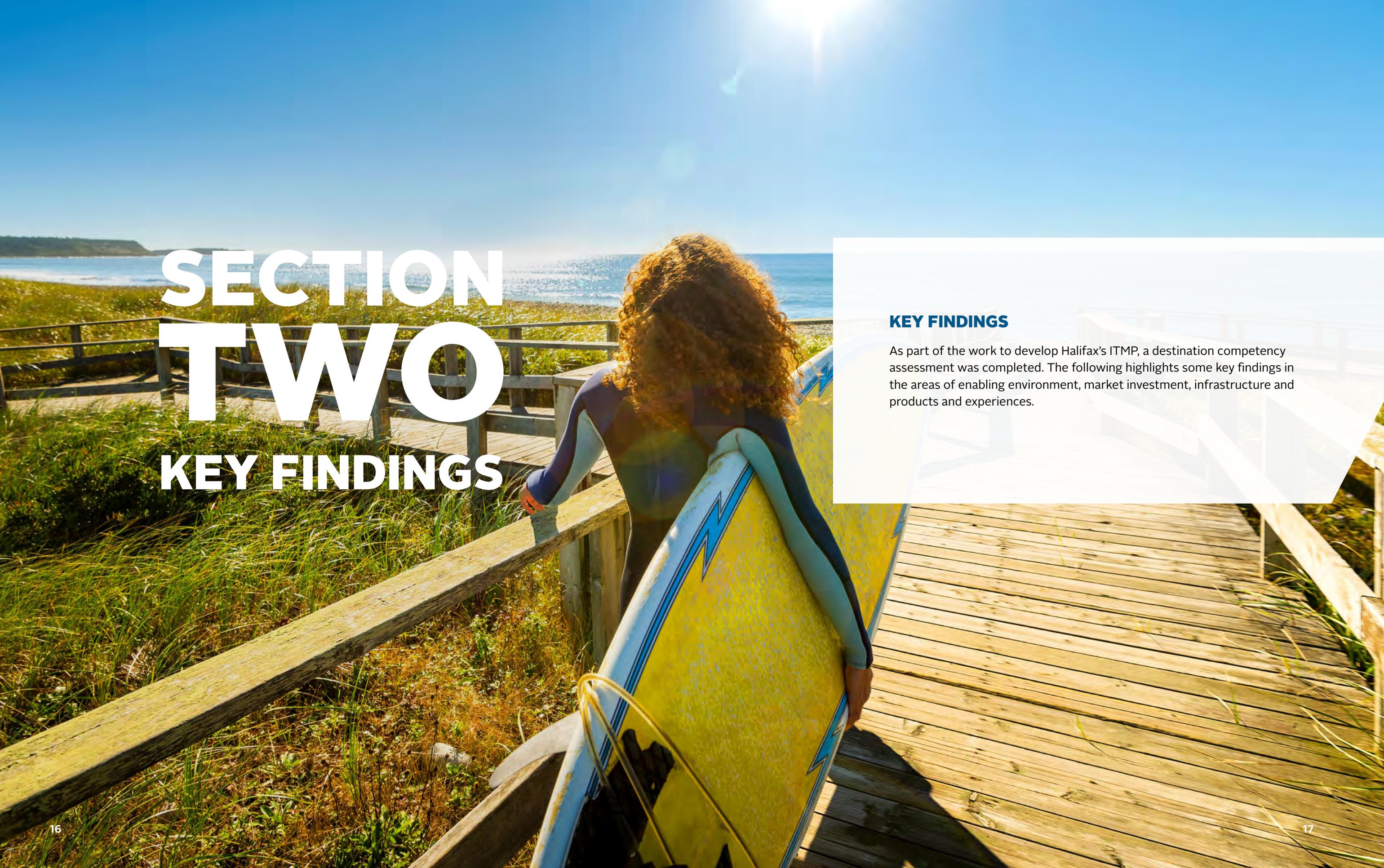
COLLECTIVE IMPACT
With collaborative action

Collective impact is not a quick fix, nor it is easy to achieve. It is a long-term, multi-sectoral effort to bring about significant change in a community—whether driven by the need to solve a problem, fix a crisis, or create a vision of a better future. Conceptually, collective impact is an excellent fit for the Halifax ITMP.

Ultimately, moving the needle on the ITMP requires an approach that can effectively mobilize the resources necessary to positively impact outcomes. No single organization can do this effectively on their own. Collective impact requires the combined efforts and resources of multiple entities.

The ITMP provides a common agenda arising from converging ideas, perspectives, plans, and more into a central aspirational idea the ecosystem can rally around.





SECTION TWO KEY FINDINGS

KEY FINDINGS

As part of the work to develop Halifax's ITMP, a destination competency assessment was completed. The following highlights some key findings in the areas of enabling environment, market investment, infrastructure and products and experiences.

POST PANDEMIC, LEISURE TRAVEL DEMAND IS EXPECTED TO RECOVER, WITH TOURISM RE-ESTABLISHING ITSELF AS ONE OF THE FASTEST GROWING INDUSTRIES IN THE WORLD.

- » Smart communities are learning how to tap into this growth to bring economic and social benefits to their communities.
- » This growth doesn't happen by itself and needs planning.
- » Communities have to be thoughtful in managing this growth to ensure improvement and not just grow for the sake of growth.
- » There is strong support for tourism as a feature of Halifax's future economy.

HALIFAX HAS THE POTENTIAL TO BE WIDELY RECOGNIZED AS THE FAVOURITE CITY IN CANADA.

- » Currently, there is low destination awareness outside the Canadian market. Halifax is a tremendous host city and could be a top destination for meetings, conventions and events.
- » Many people who come to visit Halifax come to see family and friends. There is tremendous opportunity to engage residents in attracting people to come here.
- » Halifax's many international students could also be activated as ambassadors to invite family and friends to the region. We know people who come here to visit often return to study, live, and work.
- » There is an immediate opportunity for operators to develop market-ready, high-yield experiences, connected to our ocean advantage, heritage, culture, and culinary talents.

MAXIMIZE OUR FULL POTENTIAL FOR YEAR-ROUND VISITATION

- » Seasonality and shorter operating hours are critical issues for Halifax's tourism industry. This must be addressed through marketing and product development to offer experiences year-round.
- » There is an opportunity to create an authentic Halifax signature event outside the peak season.
- » With our world-class convention centre, Halifax could attract meetings and conventions year-round, although more investment and access to accommodations for larger events are required.
- » Human resources and labour markets in urban and rural areas need to improve for businesses and attractions to stay open longer.

IF WE MAKE HALIFAX AN EVEN BETTER DESTINATION FOR VISITORS, IT WILL ALSO BE BETTER FOR RESIDENTS.

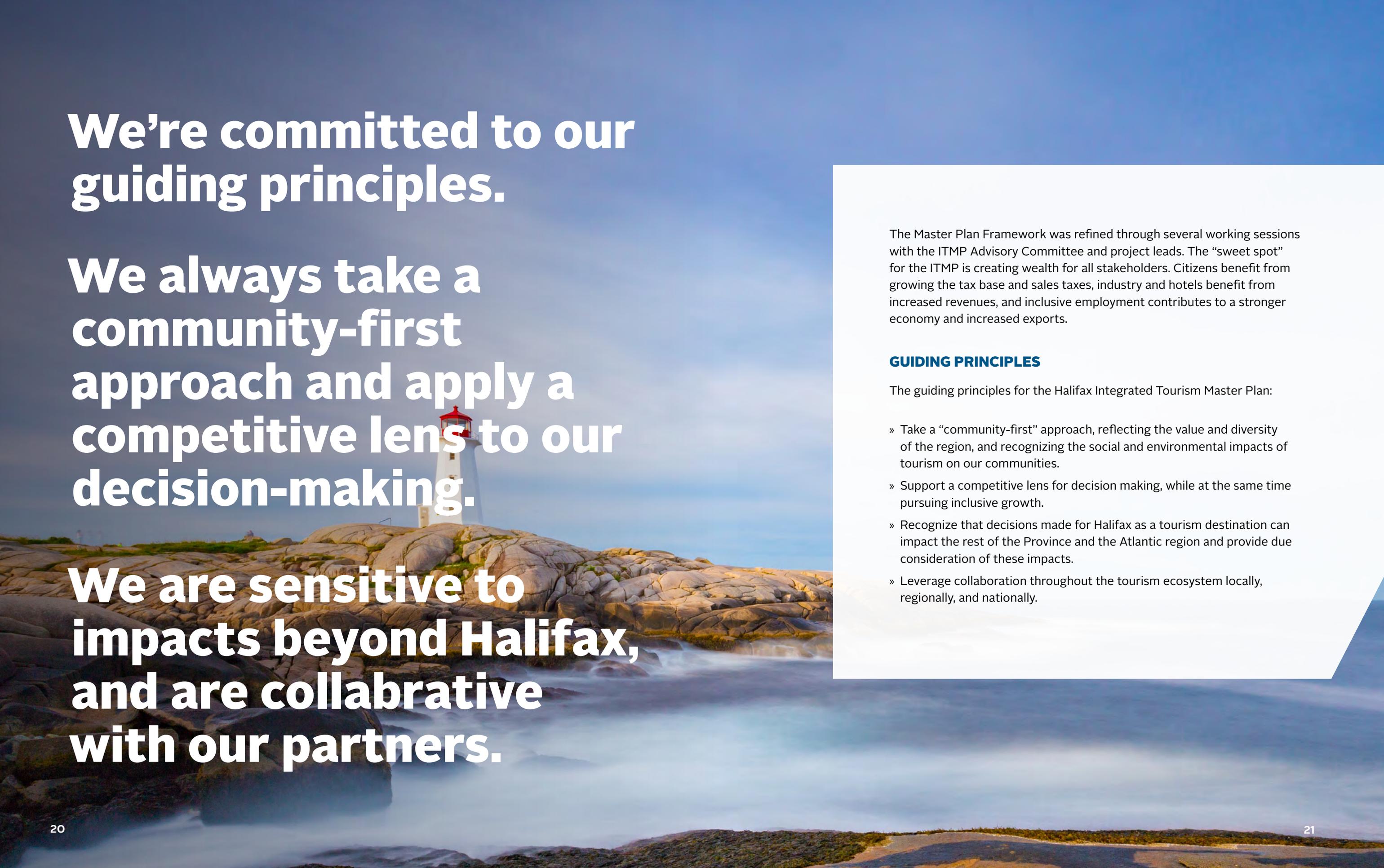
- » The public transportation infrastructure for tourism, and availability of transportation options, need to improve to compete with other destinations.
- » Access to public washrooms is a major problem for travellers and business owners in rural parts of the Halifax Regional Municipality.
- » Development of the tourism industry must consider impacts on the community and appropriate infrastructure.
- » Sustainability and environmental impacts must continue to be top priorities to protect natural environments and address rising sea level along our coastlines.

HALIFAX'S GREATEST ASSETS ARE OUR PEOPLE AND THE UNIQUE COMBINATION OF RURAL AND URBAN EXPERIENCES.

- » There is strong support for tourism as a component of Halifax's future economy.
- » Our focus should be on attracting high-yield markets and investing in demand generators and capacity in rural Halifax Regional Municipality.
- » Halifax needs to develop a more comprehensive asset development strategy to better disperse travellers across the region.
- » Strategies to improve wayfinding and accommodation offerings will help travellers explore more of the region and extend their stay in rural communities.
- » Access to transportation options commonly found in other destinations, such as ridesharing, carsharing, and well-marked bike paths will help disperse visitors.

DISCOVER HALIFAX STAKEHOLDERS ARE EAGER TO PARTNER AND COLLABORATE UNDER CLEAR LEADERSHIP.

- » Discover Halifax and its stakeholders are united by a shared goal to build the destination through manageable and sustainable growth. This was evident throughout the effort to create the ITMP.
- » Municipal and provincial government must continue to consider the tourism sector and industry impacts.
- » Policies and practices must support sustainable and responsible tourism as this is a priority to both residents and visitors.
- » Policy development and regulations are having unintended consequences on the visitor economy, particularly for meetings, conventions, and events.



We're committed to our guiding principles.

We always take a community-first approach and apply a competitive lens to our decision-making.

We are sensitive to impacts beyond Halifax, and are collaborative with our partners.

The Master Plan Framework was refined through several working sessions with the ITMP Advisory Committee and project leads. The “sweet spot” for the ITMP is creating wealth for all stakeholders. Citizens benefit from growing the tax base and sales taxes, industry and hotels benefit from increased revenues, and inclusive employment contributes to a stronger economy and increased exports.

GUIDING PRINCIPLES

The guiding principles for the Halifax Integrated Tourism Master Plan:

- » Take a “community-first” approach, reflecting the value and diversity of the region, and recognizing the social and environmental impacts of tourism on our communities.
- » Support a competitive lens for decision making, while at the same time pursuing inclusive growth.
- » Recognize that decisions made for Halifax as a tourism destination can impact the rest of the Province and the Atlantic region and provide due consideration of these impacts.
- » Leverage collaboration throughout the tourism ecosystem locally, regionally, and nationally.

MASTER PLAN FRAMEWORK

Working together, the Halifax region will harness our local culture to build and promote a model, sustainable tourism destination. By remaining authentic to our heritage and Halifax's distinct vibe, diversity, creativity, and talent, we will share our unique communities and a quality of life that is deeply connected to our ocean advantage.



VISION

TO BE WIDELY RECOGNIZED AS THE FAVOURITE CITY IN CANADA.



GOALS



GROW TOURISM REVENUES



ENRICH THE LIVES OF RESIDENTS



GROW TOURISM EMPLOYMENT



ALIGN WITH RELATED STRATEGIES

STRATEGIC THEMES



BUILD AND ENHANCE HALIFAX'S KEY DEMAND GENERATORS



ATTRACT HIGHEST YIELD AND GROWTH MARKETS



MAKE IT EASY TO GET HERE AND VISIT



BE VIBRANT AND ALIVE, 365



DEVELOP RESPONSIBLE TOURISM



ESTABLISH, IDENTIFY, AND APPOINT TOURISM LEADERSHIP

SECTION THREE

RECOMMENDATIONS





BUILD & ENHANCE HALIFAX'S KEY DEMAND GENERATORS

WHAT IS THE OPPORTUNITY?

Halifax has a wide variety of tourism assets, although many are concentrated in urban Halifax. We have an opportunity to build on existing assets with a comprehensive asset development strategy. The strategy must take advantage of Halifax's best assets, including its signature tourism icons, historic places, ocean advantage, and its natural, outdoor resources.

Examples of how we can achieve success:

- » Enhance demand generators through the continued designation of districts e.g. Arts District, Entertainment District, Heritage Conservation Districts
- » Create a community-led vision for the Dartmouth Waterfront to encourage more visitation and potentially include a cruise dock
- » Complete a needs analysis for additional and enhanced outdoor venues
- » Create capacity to better leverage existing experience development programs to generate more Halifax tourism experiences

HOW THIS BENEFITS RESIDENTS

Halifax's icons not only represent what people will find here when they visit, they also represents our quality of life. By enhancing these assets, residents can also enjoy these amenities.

There are other benefits, too. The designation of districts can help residents determine the best communities to live in that suit their lifestyle, while enhancing outdoor spaces gives local recreational and entertainment services modern upgrades.



ATTRACT HIGHEST YIELD AND GROWTH MARKETS

WHAT IS THE OPPORTUNITY?

Halifax's history, culture, music, and culinary experiences are world class, or have world-class potential. Awareness of Halifax as a destination, however, remains low in international markets and current marketing campaigns do not reach all Canadians. Halifax has been undergoing a major renaissance and should share this story with the rest of the country and the world.

An immediate opportunity exists to develop market-ready, high-yield experiences that target Halifax's ideal visitor. For example, market research has shown us that visitors highly value experiences on Nova Scotia's islands and are willing to pay for them.

Current market research shows that Halifax is a hit with empty-nesters who travel with their partner or spouse. They typically have more disposable income and they have the ability to extend their stay to enjoy authentic experiences in Halifax.

Examples on how we can achieve success:

- » Expand the stopover program at the Halifax Stanfield International Airport to national and international markets, when the time is right
- » Implement the Wild Islands Plan
- » Develop an incentive program to attract strategic conferences in the low-season

HOW THIS BENEFITS RESIDENTS

In 2019, 5.3 million overnight stays came to Halifax, spending \$1.3 billion locally. Tourism has the potential to do more to help reach Halifax's GDP goals set out in its Economic Growth plan by sharing our heritage, arts, and culture.

The global tourism economy is highly competitive, and travellers are looking for unique experiences. It is possible that following this pandemic, travellers are going to be even more selective about where and how they spend their dollars. To remain competitive, it will be important to develop offerings based on Halifax's best assets.



MAKE IT EASY TO GET HERE AND VISIT

WHAT IS THE OPPORTUNITY?

The accessibility of Halifax's international airport is an important asset for the Halifax region, as well as the Province of Nova Scotia. The pandemic has made this even more evident with access to air travel significantly impacted. Other modes of transportation are also limited.

Travellers have come to expect services such as ride-share and car-share, which are readily available in other top destinations. These are not yet in Halifax and that must change for us to compete.

But travel is more than transportation. It is also about how you navigate a place, check reviews, find restaurants, hotels, attractions, and events. Most of this is done online, both in advance and while visitors are here. Improvements to broadband and cell coverage are essential to connect people to this information.

Public washrooms, rental vehicles, public transportation, and bike paths will help make it easier to visit, while also benefitting citizens.

Examples of how we can achieve success:

- » Support policy process through the Inclusive Economic Growth Model for short-term rentals
- » Increase availability and accessibility of washrooms throughout the region
- » Improve broadband and cellular coverage throughout the region

HOW THIS BENEFITS RESIDENTS

The Province of Nova Scotia has already recognized that high-speed internet is essential for communities to innovate and grow. They have made significant investments and appointed Develop Nova Scotia to lead the project.

Access to these types of services help influence current and prospective residents to determine where they want to live and work. In particular, prospective residents look for services on par with other modern cities, like high-speed internet, public transportation, taxis, and access to ride-share or car-share programs.



BE VIBRANT AND ALIVE 365

WHAT IS THE OPPORTUNITY?

The Halifax region is rated highly as a tourism destination with a wide variety of things to do, but many experiences are restricted to certain seasons and weather conditions, and sometimes are limited to peak hours or days of the week.

The availability of year-round, outdoor experiences would immediately expand economic opportunities through tourism. In some cases, limitations on staffing have impacted expanded hours, particularly in rural areas.

While seasonality is a challenge for many destinations, other locations have started to embrace their Canadian identity, developing successful all-weather experiences. This has the added benefit of getting people outdoors and active during winter months, which can improve overall mental health and wellness.

Halifax has the same opportunity as other destinations to enjoy a vibrant nightlife, embrace winter conditions, and celebrate all four seasons, 365 days of the year.

Examples of how we can achieve success:

- » Launch Halifax Music City Strategy
- » Create two events, including a signature event in the low-season
- » Develop the new Waterfront Arts District as an inclusive place to experience art

HOW THIS BENEFITS OUR COMMUNITIES

Tourism provided approximately 34,000 jobs to people living in the Halifax region in 2019. For many people, their first job was in the tourism industry and provided essential, transferrable skills for the rest of their career. For others, the jobs fit well with their lifestyle. And, for most, the roles are extremely rewarding and fun.

These opportunities could be further extended and provide jobs to Nova Scotians with more flexibility if we created new events to enjoy outside of the peak season and hours.



DEVELOP RESPONSIBLE TOURISM

When it comes to our values, people in Halifax are clear. We must respect and protect the environment and the ancestral land of the Mi'kmaq.

This includes managing growth from tourism in a responsible way so that it is sustainable, dispersed throughout the region, and not compressed to certain areas. This will be especially important as the popularity of Peggys Cove continues to grow and the cruise industry looks at options for recovery and growth. Our coastal experiences are critical tourism drivers and we must prepare for impending issues like rising sea levels.

Global citizens are increasingly concerned about the impacts of travel. They look for destinations that share these values and

mitigate environmental impacts. Above all, they look for destinations that are safe. This includes from a public health and safety perspective from pandemic threats.

Examples of how we can achieve success:

- » Develop a plan for managed growth of the cruise sector
- » Protect local icons, such as Peggys Cove
- » Support the development of Wije'winen (Reimagined Mi'kmaq Native Friendship Centre)

HOW THIS BENEFITS OUR COMMUNITIES

A safe place to visit is also a safe place to live. The Halifax region will be regarded as a leading destination for responsible tourism if we actively protect our environment.

Protecting this pristine landscape is as much about protecting a way of life, now and for future generations, as it is about mitigating costly mistakes.



ESTABLISH, IDENTIFY, APPOINT TOURISM LEADERSHIP

There are a number of key partners working together to provide services to citizens as well as residents. Currently, there is a lack of clarity on tourism priorities. Some initiatives are not well connected and policies often do not take into consideration visitor experience. Additionally, the tourism industry needs to prepare for the possibility of future risks and manage the impacts.

An opportunity exists to establish, identify, and appoint leadership to help improve processes, particularly in areas like event approval and activation, availability and cost for performance space, and related regulations that are currently impacting Halifax's tourism economy.

Examples on how we can achieve success:

- » Evolve Discover Halifax to become the backbone organization for ITMP
- » Expand Discover Halifax's core programs beyond sales and marketing to include destination management

HOW THIS BENEFITS OUR COMMUNITIES

Residents always benefit when organizations work together to improve efficiencies and make informed decisions for the region. The meeting, conventions, and events sector already works together on behalf of the Halifax region, but it can be difficult to compete with other cities with deeper pockets.

To be even more successful in attracting events that residents can also enjoy, leadership can help increase economic benefits from this market. In 2019, the direct economic benefit from events confirmed by Discover Halifax was over \$58 million. These funds go directly back into our local economy.

ACTION PLAN

The development of the ITMP revealed a long list of initiatives being pursued in the name of “tourism development” and/or with business plans noting “tourism” as a key economic benefit.

In developing the ITMP Action Plan, all proposed initiatives were assessed in relation to the ITMP strategic themes, as well as the destination assessment.

Any initiatives that were aligned were further assessed in terms of “Potential & Impact” as well as “Ability to Influence & Action”. Those initiatives that were not aligned with the ITMP may be revisited as the destination continues to evolve.

Of course, these projects are dynamic and evolving and each project is at a different stage of development. This plan should be considered a living document and reviewed on a regular basis to ensure priorities are still aligned with current needs.

INVESTMENT FILTER

Going forward, to assist proponents and funders in assessing whether a proposed initiative is aligned with the ITMP, the following checklist has been developed to serve as an “Investment Filter” tool. The initiative should:

- » Align with one or more ITMP Strategic Theme
- » Address a gap identified in the ITMP Destination Assessment
- » Can be measured (specify how)
- » Drive results that align with the ITMP Dashboard
- » Connect to the ITMP Collective Impact approach



Halifax has a wide variety of tourism assets, although many are concentrated in urban Halifax. We have an opportunity to build on existing assets with a comprehensive asset development strategy.

SECTION FOUR CONTRIBUTORS

PARTNERS IN DEVELOPING THE TOURISM INTEGRATED MASTER PLAN

Discover Halifax, the Atlantic Canada Opportunities Agency, and the Halifax Regional Municipality were the founding members and principal investors in the development of the Integrated Tourism Master Plan.



HALIFAX



Discover Halifax wishes to extend a huge thank you to all partners and stakeholders who contributed their input, knowledge, and expertise to the development of this plan. We're excited to continue working with you and support the recovery and sustainable growth of the visitor economy.

Consulting team:



MICHELE MCKENZIE
MCKENZIE BUSINESS STRATEGIES

Discover Halifax Board of Directors 2020-2021

JEFF RANSOME
PAST CHAIR OF THE BOARD

General Manager
Halifax Marriott Harbourfront

JENNIFER ANGEL
CHAIR OF THE BOARD

President and Chief Executive Officer,
Develop Nova Scotia

DOUG TOWNSEND
VICE CHAIR OF THE BOARD

Co-Owner, the Canteen in Portland

DAVID CLARK
SECRETARY OF THE BOARD

General Manager, Atlantica Hotel

PAUL BRIGLEY
TREASURER OF THE BOARD

Vice President of Finance and Chief Financial
Officer, Halifax International Airport

DENISE SCHOFIELD

Executive Director, Parks & Recreation
Halifax

MEGAN DELANEY

General Manager Cambridge Suites Hotel

KATHY PERRIER

General Manager, Holiday Inn
Express & Suites Halifax – Bedford

KEN BAGNELL

President, Canadian Sport Centre Atlantic

PATTY CUTTELL

City Councillor, Halifax

MICHELE SARAN

Chief Executive Officer, Tourism Nova Scotia

MIKE SAVAGE

Mayor, Halifax

RYAN MURPHY

President/Owner Murphy's Camping in the
Ocean and Bread & Better, Small Business
Solutions Inc.

SUSAN WILSON

Director Human Resources,
Sutton Place Hotel

ROSS JEFFERSON, EX OFFICIO

President and Chief Executive Officer,
Discover Halifax

Advisory Board for the Development of the Integrated Tourism Master Plan

MAYOR MIKE SAVAGE

Halifax Regional Municipality

MATT HEBB

Dalhousie University

JENNIFER ANGEL

Develop Nova Scotia

JOYCE CARTER

Halifax International Airport Authority

CHUCK MAILLET

ACOA

WENDY LUTHER

Halifax Partnership

TREVOR MURPHY

Creative NS Leadership Council

JULIE TOMPA

Parks Canada

JEFF RANSOME

Marriott Hotel

DARLENE MACDONALD

Tourism Nova Scotia

IAN THOMPSON

Cox Palmer

DON BUREAUX

Nova Scotia Community College

GORDON HAMMOND

Museums & Institutions

CATHERINE MARTIN

NS Indigenous Tourism Enterprise Network

RUSSELL GROSSE

Black Cultural Centre

JOE RAMIA

Rank Inc

ROSS JEFFERSON

Discover Halifax

MAGGIE MACDONALD

Halifax Regional Municipality

SECTION FIVE DEFINITIONS

HALIFAX refers to the entire Halifax Regional Municipality. The municipality as outlined in the adjacent map, the municipality includes several sub-regions as identified by Discover Halifax (e.g., Downtown, North End, and Eastern Shore).

COLLECTIVE IMPACT brings people together to achieve large-scale changes, particularly social change.

DMOS stands for destination marketing organizations, which provide services to market a region to travellers. Discover Halifax is one example in a DMO in Nova Scotia who focuses on attracting both leisure and business travellers.

ITMP refers to the Integrated Tourism Master Plan. This title incorporated the importance of integrating this plan with other strategies and plans and ensuring the tourism industry is considered in Halifax's economic development plans.

PLACEMAKING is a multi-faceted approach to build places for people with people. This means designing and managing public spaces that promote people's health, happiness, and well-being.

SHAREHOLDER includes members of Discover Halifax who invest in the success of the organization and tourism industry.

STAKEHOLDER includes anyone with an interest in the success of the tourism industry, including businesses and residents.

SHOULDER SEASON refers to the calendar months of November to May, which are outside of Halifax's busiest travel period of June to October. It is also sometimes referred to as the "low-season".

VISITOR ECONOMY is defined by the World Travel and Tourism Council (WTTC) as any direct, indirect, and induced economic activity resulting from visitors interactions with their destination.

WAYFINDING includes all the ways in which people get around and navigate a place.



APPENDIX A

PRIORITY & IMPLEMENTATION

Discover Halifax is always proud to promote our region and will continue to do so in the implementation of these initiatives. In order to move some tourism initiatives across the finish line, Discover Halifax will need to be properly resourced and evolve into a destination management organization.

In the meantime, we continue to engage our partner network to achieve the recommendations within the ITMP. There are several strategies that are also connected to these initiatives and can be leveraged to achieve success.

We're proud to have so many incredible partners who are committed to making Halifax a better place to live, work and visit.

RELATED THEMES	POSSIBLE INITIATIVES	LEADS (L) PARTNERS & POTENTIAL PARTNERS (P)	LEVERAGED STRATEGIES (IF APPLICABLE)	PRIORITY
BUILD AND ENHANCE HALIFAX'S KEY DEMAND GENERATORS	Create an investment filter as a tool to help assess the tourism impacts of proposed investments	Discover Halifax (L) Tourism Nova Scotia (P) Halifax Regional Municipality (P) Halifax Partnership (P) Atlantic Canada Opportunities Agency (ACOA) (P)	Tourism Nova Scotia, Halifax Economic Strategy & Atlantic Canada Agreement on Tourism, Atlantic Canada Opportunities Agency (ACOA)	First-term priority
	Attract more people to skilled labour programs for the restaurant sector	Restaurant Association of Nova Scotia (RANS) (L) Tourism Industry Association of Nova Scotia (TIANS) (P) Nova Scotia Apprenticeship Agency (P)	Halifax Economic Strategy, TIANS Strategy, Tourism Nova Scotia, NSCC	Mid-term priority
	Implement the Wild Islands Plan	Wild Islands Tourism Advancement Partnership (L) Destination Eastern & Northumberland Shores (DEANS) (P) Develop Nova Scotia (P) Tourism Nova Scotia (P) Halifax Regional Municipality (P) Nova Scotia Community College (NSCC) (P) Black Business Initiative (P) Mi'kmaw communities (P)	Federal Tourism Strategy, Tourism Nova Scotia, Develop Nova Scotia	Mid-term priority
	Enhance demand generators for an Arts District, an Entertainment District, and Heritage Conservation Districts.	Halifax Regional Municipality (L) Business Improvement Districts (BIDS) (P) Develop Nova Scotia (P) Art Gallery of Nova Scotia (P)	Halifax Economic Strategy, Tourism Nova Scotia	Longer-term priority
	Create an experience development program	Discover Halifax (L) Tourism Nova Scotia (P) RANS (P) Taste of Nova Scotia (P) Nova Scotia Indigenous Tourism Enterprise Network (NSITEN) (P) Black Cultural Centre (P) Federation Acadienne De La Nouvelle-Écosse (FANE) (P) Destination Canada (P)	Federal Tourism Strategy, Tourism Nova Scotia, Tripartite Forum	First-term priority
	Launch Halifax Music City Strategy	Discover Halifax (L) Halifax Partnership (L) Halifax Music Industry (L) Department of Communities Culture and Heritage (CCH) (P)	NS Culture Action Plan, Federal Tourism Strategy	First-term priority

RELATED THEMES	POSSIBLE INITIATIVES	LEADS (L) PARTNERS & POTENTIAL PARTNERS (P)	LEVERAGED STRATEGIES (IF APPLICABLE)	PRIORITY
	Develop and enhance culinary experience program	Discover Halifax (L) RANS (L) Taste of Nova Scotia (P) NSCC (P) Seafood Alliance (P) Destination Canada (P)	Federal Tourism Strategy, Tourism Nova Scotia, Taste of Nova Scotia	First-term priority
	Create two events including a signature event	Discover Halifax (L) Halifax Regional Municipality (L) Develop Nova Scotia (P) Department of CCH (P), Culture and heritage community / Private Sector (P)	Federal Tourism Strategy, NS Events Strategy, NS Culture Action Plan, Tourism Nova Scotia, Develop Nova Scotia	Mid-term priority
	Create a community-led vision for the Dartmouth waterfront to disperse visitation and potentially include a cruise dock	Halifax Regional Municipality (L) Develop Nova Scotia (L) Alderney Landing (P) Downtown Dartmouth Business Commission (P) Halifax Port Authority (P)	Port of Halifax Cruise Plan	Mid-term priority
	Enhance the canoe-kayaking competition facility on Lake Banook	Canoe Kayak Nova Scotia (L) Halifax Regional Municipality (P)	Federal Tourism Strategy, Tourism Nova Scotia, Halifax Economic Strategy	Mid-term priority
	Implement the Peggys Cove Master Plan	Develop Nova Scotia (L) Tourism Nova Scotia (P) ACOA (P)	Federal Tourism Strategy, Tourism Nova Scotia, Peggys Cove Master Plan	First-term priority
	Fully implement the Harbour Islands Visitor Experiences Strategy (Georges and McNabs Islands)	Develop Nova Scotia (L) Parks Canada (L) Department of Lands and Forestry (Provincial Parks) (P) Tourism Nova Scotia (P) Friends of McNabs Island Society (P)	Federal Tourism Strategy, Tourism Nova Scotia, Halifax Economic Strategy	First-term priority
	Implement the Marine Tourism Strategy	Develop Nova Scotia (L) in collaboration with multiple marine infrastructure and supply chain partners (P)	Province of Nova Scotia, Develop Nova Scotia, Halifax Economic Strategy, Ocean Supercluster	Mid-term priority
	Develop the new Waterfront Art District as a place for everyone to experience Nova Scotia art and culture	Art Gallery of Nova Scotia (L) Develop Nova Scotia (L) Halifax Regional Municipality (L)	Federal Tourism Strategy, ACAT, Tourism Nova Scotia, NS Culture Action Plan	Longer-term priority
	Complete a needs analysis for additional and enhanced outdoor performance venues	Halifax Regional Municipality (L)	NS Culture Action Plan, Tourism Nova Scotia	First-term priority

RELATED THEMES	POSSIBLE INITIATIVES	LEADS (L) PARTNERS & POTENTIAL PARTNERS (P)	LEVERAGED STRATEGIES (IF APPLICABLE)	PRIORITY
ATTRACT HIGHEST YIELD GROWTH MARKETS	Create an investment filter as a tool to help assess the tourism impacts of proposed investments	Discover Halifax (L) Tourism Nova Scotia (P) Halifax Regional Municipality (P) Halifax Partnership (P) ACOA (P)	Tourism Nova Scotia Strategic Plan, Halifax Economic Strategy, Federal Tourism Strategy, Atlantic Growth Strategy & Atlantic Canada Agreement on Tourism	First-term priority
	Establish an “Events Attraction Office” and implement the recommendations of STAT pro report	Halifax Regional Municipality (L) Discover Halifax (L) Events East (P)	Federal Tourism Strategy, ACAT, Tourism Nova Scotia, Nova Scotia CCH Events Strategy	First-term priority
	Expand Stopover program at Halifax Stanfield International airport	Discover Halifax (L) Halifax International Airport Authority (L)	Stopover program	Mid-term priority
	Implement the Wild Islands Plan	Wild Islands Tourism Advancement Partnership (L) DEANS (P) Develop Nova Scotia (P)	Federal Tourism Strategy, Tourism Nova Scotia, Develop Nova Scotia	Mid-term priority
	Develop business case for increased marketing investment in fly markets	Discover Halifax (L) Halifax International Airport Authority (L)	Federal Tourism Strategy, ACAT, Tourism Nova Scotia	First-term priority
	Develop an incentive program to attract strategic conferences in low-season	Discover Halifax (L) Events East (P) Events Nova Scotia (P) Halifax Partnership (P)	Federal Tourism Strategy, ACAT, Halifax Economic Strategy, Events East	First-term priority
	Enhance demand generators for the Designate Arts District, Entertainment District, Heritage Conservation Districts	Halifax Regional Municipality (L) BIDS (P) Develop Nova Scotia (P) Art Gallery of Nova Scotia (P)	Halifax Economic Strategy, Tourism Nova Scotia	Longer-term priority
MAKE IT EASY TO GET HERE AND VISIT	Expand Stopover program at Halifax Stanfield International airport	Discover Halifax (L) Halifax International Airport Authority (L)	Stopover program	Mid-term priority
	Develop business case for increased marketing investment in fly markets	Discover Halifax (L) Halifax International Airport Authority (L)	Federal Tourism Strategy, ACAT, Tourism Nova Scotia	First-term priority

RELATED THEMES	POSSIBLE INITIATIVES	LEADS (L) PARTNERS & POTENTIAL PARTNERS (P)	LEVERAGED STRATEGIES (IF APPLICABLE)	PRIORITY
BE VIBRANT AND ALIVE, 365	Adopt ride-hailing services	Halifax Regional Municipality (L) Halifax Partnership (P) Discover Halifax (P)		First-term priority
	Action the Halifax Transit Rapid plan	Halifax Regional Municipality (L) Provincial and federal governments (P)	Rapid Transit Strategy	First-term priority
	Support policy process through the Inclusive Economic Growth Model for short-term rentals	Halifax Regional Municipality (L) Discover Halifax (P)		First-term priority
	Create a community-led vision for the Dartmouth waterfront to disperse visitation and potentially include a cruise dock	Halifax Regional Municipality (L) Develop Nova Scotia (L) Alderney Landing (P) Downtown Dartmouth Business Commission (P) Halifax Port Authority (P)	Port of Halifax Cruise Plan	Mid-term priority
	Increase the availability of public washrooms throughout region	Halifax Regional Municipality (L) Develop Nova Scotia (P)	Halifax Regional Municipality Plan	First-term priority
	‘Internet for Nova Scotia’—improve broadband throughout the region	Develop Nova Scotia (L)	Halifax Economic Strategy, Province of Nova Scotia Priorities	First-term priority
	Establish an “Events Attraction Office” and implement the recommendations of stat pro report	Halifax Regional Municipality (L) Discover Halifax (L)	Federal Tourism Strategy, ACAT, Tourism Nova Scotia, Nova Scotia CCH Events Strategy	First-term priority
BE VIBRANT AND ALIVE, 365	Develop an incentive program to attract strategic conferences in low-season	Discover Halifax (L) Events East (P) Events Nova Scotia (P) Halifax Partnership (P)	Federal Tourism Strategy, ACAT, Halifax Economic Strategy, Events East	First-term priority
	Enhance demand generators for the Designate Arts District, Entertainment District, Heritage Conservation Districts	Halifax Regional Municipality (L) BIDS (P) Develop Nova Scotia (P) Art Gallery of Nova Scotia (P)	Halifax Economic Strategy, Tourism Nova Scotia	Longer-term priority
	Launch Halifax Music City Strategy	Discover Halifax (L) Halifax Partnership (L) Halifax Music Industry (L) Department of CCH (P)	NS Culture Action Plan Federal Tourism Strategy	First-term priority

RELATED THEMES	POSSIBLE INITIATIVES	LEADS (L) PARTNERS & POTENTIAL PARTNERS (P)	LEVERAGED STRATEGIES (IF APPLICABLE)	PRIORITY
	Develop and enhance culinary experience program	Discover Halifax (L) RANS (L) Taste of Nova Scotia (P) NSCC (P) Seafood Alliance (P) Destination Canada (P)	Federal Tourism Strategy, Tourism Nova Scotia, Taste of Nova Scotia	First-term priority
	Create two events including a signature event	Discover Halifax (L) Halifax Regional Municipality (L) Develop Nova Scotia (P) CCH (P) Culture Community / Private Sector (P)	Federal Tourism Strategy, NS Events Strategy, NS Culture Action Plan, Tourism Nova Scotia, Develop Nova Scotia	Mid-term priority
	Create an experience development program	Discover Halifax (L) Tourism Nova Scotia (P) RANS (P) Taste of Nova Scotia (P) Nova Scotia Indigenous Tourism Enterprise Network (NSITEN) (P) Black Cultural Centre (P) Fédération acadienne de la Nouvelle-Écosse (FANE) (P) Destination Canada (P)	Federal Tourism Strategy, Tourism Nova Scotia, Tripartite Forum,	First-term priority
	Develop the new waterfront Art District as a place for everyone to experience Nova Scotia art and culture	Art Gallery of Nova Scotia (L) Develop Nova Scotia (L) Halifax Regional Municipality (L)	Federal Tourism Strategy, ACAT, Tourism Nova Scotia, NS Culture Action Plan	Longer-term priority
	Complete a needs analysis for additional and enhanced outdoor performance venues	Halifax Regional Municipality (L)	NS Culture Action Plan, Tourism Nova Scotia	First-term priority
DEVELOP RESPONSIBLE TOURISM	Evolve Discover Halifax to become backbone organization for Integrated Tourism Master Plan	Halifax Regional Municipality (L) Discover Halifax (P)	Federal Tourism Strategy, Tourism Nova Scotia	First-term priority
	Develop a plan for managed growth of the cruise sector	Discover Halifax (L) Halifax Port Authority (L) Atlantic Canada Cruise Association (P)	Port of Halifax Cruise Plan	Mid-term priority

RELATED THEMES	POSSIBLE INITIATIVES	LEADS (L) PARTNERS & POTENTIAL PARTNERS (P)	LEVERAGED STRATEGIES (IF APPLICABLE)	PRIORITY
	Support policy process through the Inclusive Economic Growth Model for short-term rentals	Halifax Regional Municipality (L) Discover Halifax (P)		First-term priority
	Action the Halifax Transit Rapid Plan	Halifax Regional Municipality (L) Provincial and Federal governments (P)	Halifax Regional Municipality	First-term priority
	Implement the Peggys Cove Master Plan	Develop Nova Scotia (L) Tourism Nova Scotia (P) ACOA (P)	Federal Tourism Strategy, Tourism Nova Scotia, Peggys Cove Master Plan	First-term priority
	Fully implement the Harbour Islands Visitor Experiences Strategy (Georges and McNabs Islands)	Develop Nova Scotia (L) Parks Canada (L) Department of Lands & Forestry (Provincial Parks) (P)	Federal Tourism Strategy, Tourism Nova Scotia, Halifax Economic Strategy	First-term priority
	Support the development of Wije'winen (Reimagined Mi'kmaw Native Friendship Centre)	Mi'kmaw Native Friendship Society (L) Develop Nova Scotia (P) Federal government (P)	Federal Tourism Strategy, Tourism Nova Scotia	Mid-term priority
ESTABLISH, IDENTIFY, APPOINT TOURISM LEADERSHIP	Evolve Discover Halifax to become backbone organization for Integrated Tourism Master Plan	Halifax Regional Municipality (L) Discover Halifax (L)	Federal Tourism Strategy, Tourism Nova Scotia	First-term priority
	Develop a plan for managed growth of the cruise sector	Discover Halifax (L) Halifax Port Authority (L) Atlantic Canada Cruise Association (P)	Port of Halifax Cruise Plan	Mid-term priority
	Develop the business case for heritage tourism in Halifax	Heritage Trust of Nova Scotia (L) Department of CCH (P)	Tourism Nova Scotia, Halifax Economic Strategy	Longer-term priority
	Support the development of Wije'winen (Reimagined Mi'kmaw Native Friendship Centre)	Mi'kmaw Native Friendship Society (L) Develop Nova Scotia (P) Federal government (P)	Federal Tourism Strategy, Tourism Nova Scotia	Mid-term priority

The background of the entire image is a solid blue color. In the lower half, there is a faint, light blue silhouette of a mountain range. Centered in the lower half is the "Discover Halifax" logo in white. The logo consists of the word "DISCOVER" in a smaller, uppercase sans-serif font above the word "HALIFAX" in a larger, bold, uppercase sans-serif font. The text is flanked by several short, horizontal white lines of varying lengths, some above and some below, creating a stylized, modern graphic element.

DISCOVER
HALIFAX



1809 Barrington Street, Suite 708
Halifax, Nova Scotia, Canada
B3J 3K8
discoverhalifaxns.com

September 28, 2020

Municipal Clerk's Office
Halifax Regional Municipality
PO Box 1749
Halifax, NS
B3J 3A5

In regard to: Case 22423 – Regulation of Short-Term Rentals & Proposed Request to Halifax Regional Municipality Marketing Levy Act

Common Clerk and Members of Council,

It has recently come to our attention that a staff report has been submitted to Council with recommendations pertaining to the regulation of Short-Term Rentals (STR). As the non-profit destination marketing organization for the Halifax region, Discover Halifax is requesting Council's consideration of an additional motion, or amendment to the existing motion, in support of a concurrent project relating to the Halifax Regional Municipality Marketing Levy Act.

In 2016, The Community Planning and Economic Development Standing Committee received a proposal from the Hotel Association of Nova Scotia for the consideration of increasing the rate collected on the marketing levy for accommodations in the Halifax Region. Specifically, the Halifax Regional Municipality Marketing Levy Act set a cap on the collection rate at two per cent. While this cap and rate was consistent during the time of the Act's initial creation, the industry standard for levy rates in Canada has changed significantly in most jurisdictions. As a result, the resources available for use from this fund have not kept pace relative to our competing destinations.

We would like to respectfully request consideration of an amendment to your current motion to also request the required amendments to the Halifax Regional Municipality Marketing Levy Act in the Mayor's letter to the Province. This would enable the Municipality to apply the marketing levy to operations consisting of less than 20 rooms or rental units to also include removal of the two per cent cap.

While this amendment would not require the increase, it would enable the Municipality to retain this option for a future date and time as appropriate. We believe this would allow for the discussions and potential service agreements to be considered at a future



1809 Barrington Street, Suite 708
Halifax, Nova Scotia, Canada
B3J 3K8
discoverhalifaxns.com

date. We also believe this option may be beneficial in support of the significant revenue losses arising from COVID-19 to the Events Fund managed through the Special Events Advisory Committee and services provided by Discover Halifax.

Respectfully Submitted,



Ross Jefferson,

President and CEO
Discover Halifax



**P.O. Box 473
Station M
Halifax, NS
B3J 2P8
Tel: 425-4890**

Executive

Megan Delaney
President

~

Kathy Perrier
Vice President

~

David Clark
Past President

~

Dave Powers
Director

~

Kevin Toth
Director

~

Sean Doucet
Director

Monday January 4, 2021

Mr. Bernie Miller
Deputy Minister, Department of Business
1660 Hollis Street, Suite 600
Halifax, Nova Scotia B3J 1V7

Dear Bernie Miller,

I am reaching out on behalf of the Hotel Association of Nova Scotia to request that we revisit the option of increasing the Hotel Market Levy.

For the past few years, we have had many conversations with the City regarding a proposal to increase the market levy by 1% with a request that the city match the funding. Based on pre-COVID revenues, we anticipated this would have generated an added \$3 million in Tourism marketing funds. While we were making great strides with this proposal last year at this time, all came to a rapid halt last March.

Based on recent conversations with both Tourism Nova Scotia and yourself, we recognize that the Tourism funding budget will look very different in the coming year. At a time when it is critical that we have funds available for the regrowth of our Industry, marketing dollars may instead be required to help with programs that have been implemented to help sustain the industry and its operators.

We recognize how difficult this situation is. Although our operators are struggling to fill hotel rooms and will continue to do so in the coming year, the ability to recoup some marketing dollars from the Hotel Market Levy will become more critical than ever. By moving forward with an increase from 2% to 3%, our hotels may be able to generate some of these lost marketing funds.

Since the process to amend the levy requires legislation change at the Provincial level, we ask that this matter be addressed immediately and have the 2% marketing cap removed.

I would also like to add that while the original proposal put forward in 2017 is not feasible at this time, we do look forward to revisiting a similar plan again in the future once we begin to see a recovery in the Tourism industry.

I welcome the opportunity to discuss further. You can reach me directly either via email at mdelaney@cambridgesuiteshotel.com or by phone at 902-492-9101.

Kind Regards,

Megan Delaney
President, Hotel Association of Nova Scotia

Cc: Mayor Mike Savage