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.
Recovery Phases:
Two Imperatives & Three Phases

Imperative 1
Safeguard lives

1. Suppress the virus as fast as possible
2. Expand treatment and testing capacity
3. Find better treatment, drugs, vaccines

Imperative 2
Safeguard livelihoods

1. Support people and businesses affected by lockdowns
2. Prepare to get back to work safely when the virus abates
3. Prepare to accelerate a recovery from an estimated -8% to -13% trough

Source: McKinsey analysis in partnership with Oxford Economics

Halifax Tourism Recovery Plan
Phase 1 – Supporting Businesses During Lockdown

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

Shop & Stay Home
Shop local retailers online!

See & Stay Home
Experience Halifax’s most iconic landmarks and attractions from home.

COVID-19 Information
Information help you to stay healthy and informed.
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
Lockdown → Partial Lifting → Extended Lifting
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
No Travel → Inter-Provincial Travel → Expanded Domestic (Canada) → International
May Move Back and Forth
Travel Restrictions (Exports)

Tourism Expenditures by Business Type

$1.4 Billion

02

Travel Restrictions
($1.4 Billion Exports)
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. Focus on Nova Scotia “Staycations” (2020)

02. Focus on Regional Maritime Drive Markets (2020)

03. Monitoring of Safe Markets for Changes in Epidemiology or Increased Risks
Strategies

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
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

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

<table>
<thead>
<tr>
<th></th>
<th>Previous Year End (2018)</th>
<th>2019 Target</th>
<th>YTD Actual (2019)</th>
<th>% reached of 2019 Target</th>
<th>% Change from Prior Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Nights Sold</td>
<td>1,413,689</td>
<td>1,391,401</td>
<td>1,464,039</td>
<td>105%</td>
<td>4%</td>
</tr>
<tr>
<td>(Traditional Hotels)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Room Nights Sold</td>
<td>322,596</td>
<td>440,000</td>
<td>442,867</td>
<td>101%</td>
<td>37%</td>
</tr>
<tr>
<td>(Online Sharing Economy)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Combined Overnight Room Sold</td>
<td>1,736,285</td>
<td>1,831,401</td>
<td>1,906,906</td>
<td>104%</td>
<td>10%</td>
</tr>
<tr>
<td>Daily Hotel Rooms Supply</td>
<td>5,545</td>
<td>5,860</td>
<td>5,897</td>
<td>100%</td>
<td>6%</td>
</tr>
<tr>
<td>(measuring growth in new</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>traditional hotels)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cruise Visitation</td>
<td>216,859</td>
<td>220,000</td>
<td>223,709</td>
<td>101%</td>
<td>2%</td>
</tr>
<tr>
<td>Airport Enplaned / Deplaned</td>
<td>4,316,079</td>
<td>4,316,079</td>
<td>4,188,443</td>
<td>97%</td>
<td>-3%</td>
</tr>
<tr>
<td>Passengers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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

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

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Previous Year End (2018)</th>
<th>2019 Target</th>
<th>YTD Actual (2019)</th>
<th>% reached of 2019 Target</th>
<th>% Change from Prior Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Count</td>
<td>398</td>
<td>431</td>
<td>471</td>
<td>98%</td>
<td>18%</td>
</tr>
<tr>
<td>Hotel Leads Issued</td>
<td>1,768</td>
<td>1,800</td>
<td>2,311</td>
<td>128%</td>
<td>31%</td>
</tr>
<tr>
<td>Service Leads Issued to Partners</td>
<td>160</td>
<td>160</td>
<td>552</td>
<td>345%</td>
<td>245%</td>
</tr>
<tr>
<td>Member Referrals Made to Clients</td>
<td>112</td>
<td>112</td>
<td>180</td>
<td>161%</td>
<td>61%</td>
</tr>
<tr>
<td>Visitor Guide &amp; Maps Distribution</td>
<td>145,000</td>
<td>202,000</td>
<td>210,000</td>
<td>10.4%</td>
<td>45%</td>
</tr>
<tr>
<td>Kiosk and Wi-Fi Channel Sessions</td>
<td>120,000</td>
<td>120,000</td>
<td>123,231</td>
<td>10.2%</td>
<td>3%</td>
</tr>
<tr>
<td>Membership Satisfaction</td>
<td>69%</td>
<td>70%</td>
<td>58%</td>
<td>83%</td>
<td>-15%</td>
</tr>
</tbody>
</table>

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 Peggy’s 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

- **5.3 MILLION** overnight stays per year
- **$1.3 BILLION** spent by visitors in Halifax every year
- **$58 MILLION** in 2019 from meetings & conventions supported by Discover Halifax
- **4,000 LOCAL BUSINESSES**
- **HALIFAX** 54% of total provincial visitation
- **34,000 JOBS** in retail stores, attractions, restaurants, hotels, drugstores, cabs, etc.

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

1 in 27 PEOPLE IN HALIFAX ARE VISITORS