

Halifax Regional ITMP 2030

What We Heard Report

March 2025

This **What We Heard Report** was prepared by UPLAND Planning + Design for Discover Halifax

March 2025

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PART 1

INTRODUCTION

1.1 About the Project

The Integrated Tourism Master Plan (ITMP) 2030 will build on the vision, goals, and strategic themes that were established when the first ITMP was launched in 2019, and will continue to be the foundation of the plan.

The Halifax Regional Municipality (HRM) covers a large geographical area, with each of the 210 communities having their own unique characteristics. Working with stakeholders and partners from across the region will help provide a clear picture of the strengths and opportunities in each area, and create a roadmap for future tourism growth. This project will help to encourage more collaboration between communities, working towards the vision of being globally recognized as Canada's favourite city.

HRM has tremendous potential for further growth through tourism, and the ITMP 2030 will continue to strengthen the economic and social benefits of the industry for people who live, visit, and invest in the region.

The ITMP 2030 serves as a roadmap for decision-making and investments related to tourism in HRM. It provides guidance and a framework for tourism-sector businesses and organizations to work together to create a region that is alive and thriving year-round.

The ITMP is intended to be a plan for all stakeholders and partners in tourism. No initiative will be able to be effectively actioned by a single organization. Since most initiatives will require partnerships to achieve success, tourism sector business and organizations will need to work collaboratively towards our common vision of being Canada's favourite city.

Project Timeline

Stakeholder Engagement (Fall 2024)
This stage involved bilateral meetings with relevant groups and associations to understand the priorities within the tourism industry.

Community Consultation (Winter 2025)
Online engagement began in Fall 2024 with the launch of the public survey and interactive mapping activities, followed by regional meetings across HRM.

Final ITMP 2030 (Spring/Summer 2025)
The final document will be presented to HRM Council.



PART 2

WHAT WE DID

2.1 Introduction

Gathering input from residents and stakeholders is critical for identifying the key issues and opportunities in a community. Recognizing this, the project began with an Engagement Strategy Meeting followed by an extensive formative engagement process. The project team hosted a series of engagement activities between September 2024 and March 2025 where participants were invited to share their perspectives and insights on their vision for the future of tourism in the HRM.

To ensure that the findings represent the diverse population of the HRM, multiple methods of engagement were used, including:

- Advisory Committee & Board of Directors Engagement
- Stakeholder Discovery Sessions
- Project Website & Public Survey
- Regional Engagement Sessions
- Stakeholder Validation Sessions

Engagement activities were promoted through multiple channels, including:

- Discover Halifax website and LinkedIn
- Partner organizations' social media platforms
- Project website
- Discover Halifax member email list
- Direct emails and phone calls to identified stakeholders

2.2 Engagement Activities

Advisory Committee & Board of Directors Engagement: To kick off public engagement for this project, two engagement sessions were held with the Discover Halifax Board of Directors and Advisory Committee members between September and November 2024. Additionally, one-on-one interviews and group engagement sessions were conducted with key stakeholders between October and November, all aimed at gathering insights on the current tourism landscape in HRM and providing stakeholders with more information about the project.



Board of Directors Engagement:
Date: September 18, 2024
People Engaged: 12

Advisory Committee:
Date: November 13, 2024
People Engaged: 16





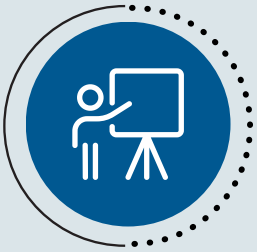
Stakeholder Discovery Sessions: A critical part of the ITMP process was to hear from businesses, organizations, and partners in the tourism industry. Between November and December, we hosted 24 group sessions and 20 one-on-one interviews. These sessions and interviews were designed for people working in the tourism industry to share the challenges they currently face, the opportunities they see, and what improvements they think would help propel the HRM towards being vibrant and alive all year round.

Dates: November - December 2024
People Engaged: 125+ stakeholders



Website & Public Survey: The survey was an opportunity to hear directly from residents about their views on the challenges and opportunities facing HRM's tourism industry, their vision for tourism development for the region over the next decade, and the programs and policies that are needed to help realize that vision.

Survey Open: December 2024 - March 2025
People Engaged: 181 (survey), 349 (overall online contributions), 1,000+ (unique website visitors)



Regional Engagement Sessions: Eight in-person, regional meetings were hosted across HRM in February and March to talk in-depth about the ITMP and get a better understanding of the local issues in all the unique corners of the municipality. These sessions provided a second opportunity for residents to inform and validate what we heard through the public survey.

Meeting Dates: February 24 through March 6, 2025
People Engaged: 100+ community members



Stakeholder Validation Sessions: Our team hosted three final sessions with stakeholders and partners. Each session was targeted to a specific group: **Food and Beverage**, **Music, Festivals and Night-time Economy**, and **Hotels and Business Events**. These sessions were an opportunity to share what we heard through previous public and stakeholder engagement and dive deeper into what initiatives and activities would have the greatest impact on tourism in the HRM.

Meeting Date: March 3 through 6, 2025
People Engaged: 70+ stakeholders

PART 3

WHO WE HEARD FROM

3.1 Stakeholders

The project team engaged with **over 125 stakeholders** from a diverse range of sectors including:

Accommodations

We spoke to industry group representatives, as well as accommodations providers from across HRM (from hotels to short-term rental operators).

Food & Beverage

We spoke to industry group representatives, restauranteurs and bar owners, as well as local hospitality and culinary program educators.

Entertainment Industry

We spoke to industry group representatives, promoters, venue operators, and artists.

Transportation

We spoke to government officials, local transportation authorities, private coach and rental car businesses, and representatives of the cruise industry.

Businesses

We spoke to business improvement districts and local representatives of HRM's chambers of commerce, as well as local business owners.

Museums & Cultural Spaces

We spoke to representatives from a number of HRM's valued museums and cultural spaces, and attractions.

Sports

We spoke to representatives from venues and organizations who promote sporting events in HRM.

Festivals & Events

We spoke to representatives from many of HRM's most popular festivals and events.

Cultural Groups

We spoke to a groups representing the interests and initiatives of Mi'kmaq, African Nova Scotian, and Acadian communities.

Tourism Operators

We spoke to tourism operators from across the region to learn about the opportunities and challenges in all corners of HRM.

We would like to thank each and every person who lent their time and voice to this project. ***Thank you!***

3.2 Public Survey Participants

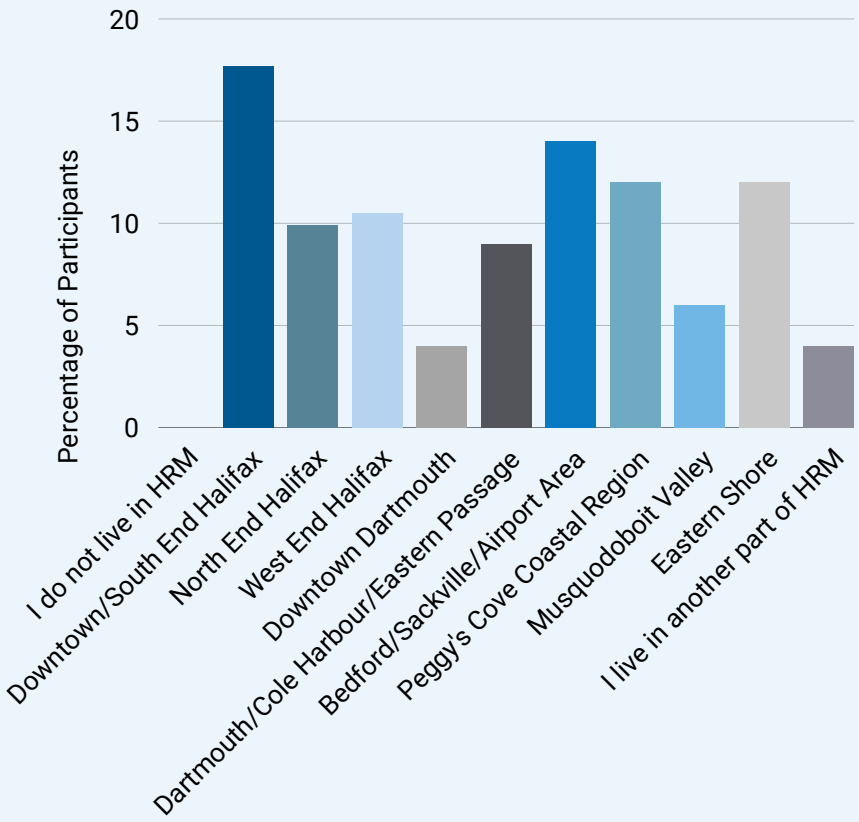
The public survey focused on identifying unique opportunities and challenges in the eight unique regions of the HRM. The survey asked residents to contribute to an online map, creating a visual representation of assets, challenges, and opportunities throughout the HRM. The public survey was open from September 23 until March 10, 2025.

A total of **181 respondents** participated in the online survey, offering valuable insights and diverse perspectives on various aspects of their community.

Snapshots from the survey will be shared throughout the report, and the full survey can be made available upon request.

Public Survey Participants Home Community

Figure 1: Home Communities of Survey Participants



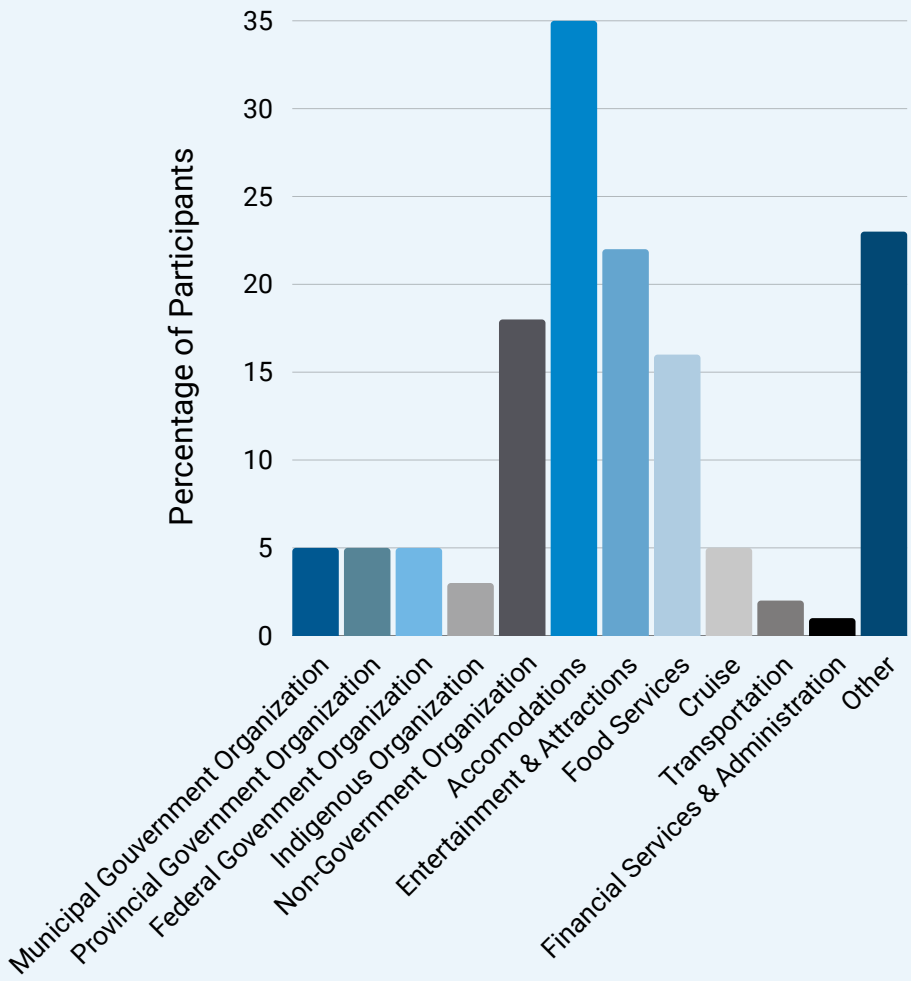


Participants Communities

Survey respondents come from various areas across the HRM, with no participants reporting residence outside the region. The majority live in Downtown/South End Halifax, Bedford/Sackville/Airport Area, and the Eastern Shore. The fewest amount of respondents are from Downtown Dartmouth, other areas of HRM, and the Musquodoboit Valley. Responses to the survey questions can be influenced by where participants live, which is important to keep in mind while viewing the survey responses.

Public Survey Participants Involvement in the Tourism Industry

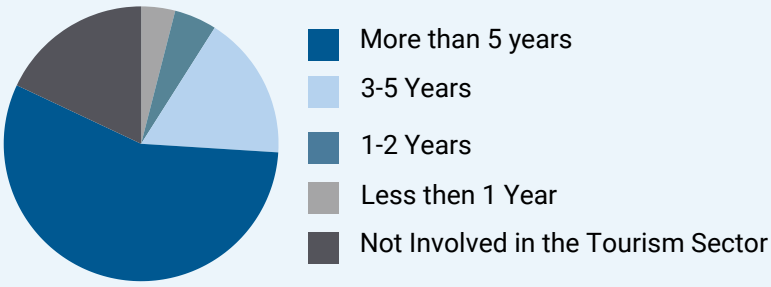
Figure 2: Tourism Sectors Represented





Survey respondents are involved in tourism in a wide variety of ways. Most respondents indicate that they are involved in the Accommodations sector, Entertainment & Attractions, or a sector not represented in the survey. The least amount of respondents represent the Indigenous Organizations, Transportation, and Financial Services & Administration sectors. Government organizations and the cruise sectors are also among the least represented.

Figure 3: Time in Tourism Sector



Time Involved in the Tourism Sector
More than half of survey respondents have worked in the tourism sector for more than 5 years. Only 9% of respondents indicated working in the tourism sector for less than 2 years.

PART 4

WHAT WE HEARD

4.1 Introduction

Feedback from stakeholders and the public was collected and thoroughly reviewed. All comments were analyzed and grouped into 7 themes:

- Accommodations
- Food & Beverage
- Transportation
- Infrastructure
- Festivals, Music & Events
- Key Attractions
- Policy Changes

The following pages include a summary of what we heard for each theme, including some region-specific highlights. Below are some overall highlights from across the region related to participant identified key assets, challenges, and opportunities.

Key Assets

- Historic and cultural attractions and events
- Waterfront, harbour, and coastal attractions
- Ease of access to outdoor and nature activities
- Accommodation and rentals
- Sense of community and hospitality
- Accessibility and walkability
- Vibrant downtowns and local businesses
- Rich culture and historical identity

Challenges

- Transportation and accessibility
- Restrictive short-term rental regulations
- The impact of chain retail developments on local businesses
- Affordable and diverse accommodations
- Lack of tourism businesses and assets in suburban and rural areas
- Lack of year-round activities and attractions
- Staff shortages
- Housing and affordability
- Limited event venues and accommodation options

Opportunities

- Transportation and connectivity
- Expanding tourism reach and experiences
- Tourism infrastructure and accommodations
- Sustainability and community support
- Support for small businesses, including promotion of the retail sector
- Short-term rentals and housing
- Cultural and event expansion
- Affordable and accessible tourism

4.2 Key Themes

Accommodations



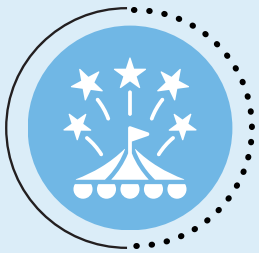
- There is a shortage of accommodations during the peak season.
- Suburban and rural areas need more accommodation options, including hotels and short-term rentals.
- Rates are high in the peak season, pricing local travellers out of the market.
- Short-term rental regulations are impacting the ability to provide accommodations in suburban and rural parts of HRM.
- There are challenges attracting and retaining workers in this sector.

Food &Beverage



- HRM “punches above its weight” with its awesome food and beverage scene - our restaurants are some of our greatest assets.
- Rising costs and labour shortages are big concerns for restaurant owners throughout the region.
- There are challenges attracting and retaining workers in this sector.
- There are opportunities to better promote food and beverage as a career path, and encourage continued education and training.
- There are opportunities for more events and festivals that centre around the culinary and beverage scene.
- There is a need for more support and promotion for suburban and rural restaurants and bars.
- There are opportunities for more experiential food and beverage tours that highlight small rural farms and restaurants.
- Outdated policies and regulations pose barriers to hosting more inclusive and flexible events.

Music &Festivals



- The music sector plays a crucial role in the HRM tourism industry.
- There is a need for a dedicated outdoor festival space to accommodate large events with dedicated infrastructure.
- There is a desire to see a unified events strategy that helps to reduce competition and improve scheduling.
- The concept of a "Music City" could help unite the city’s cultural offerings and enhance its tourism brand.
- Want to see more events and festivals outside of downtown Halifax and Dartmouth.
- Should diversify the types of events HRM hosts. There is lots of opportunity for more arts-based events.

Key Attractions



- HRM has lots of great attractions and experiences for tourists, and we do a good job of promoting those offerings.
- More could be done to promote attractions outside of the urban core and celebrate key attractions across region.
- There are opportunities for more family-friendly attractions in the region.
- We should consider our natural assets (like beaches, parks, and trails) as key attractions and make it easier for people to find and access these areas.
- Tourism in Halifax is highly seasonal and it makes it difficult to operate and keep staff year round.

Transportation



- Rental cars are scarce during the peak season.
- Parking can be challenging especially downtown.
- Traffic congestion is becoming an increasing issue and has impacts on day tours.
- Opportunities to improve micro-mobility options like bike shares and scooter rentals.
- Opportunities to improve public transit - especially to provide greater access to key attractions and amenities (i.e. beaches, trailheads, airport).
- Transit within the urban core is viewed as an asset with significant room for improvement.
- There is a dire need for public transit to extend throughout the HRM to connect urban and rural areas.
- Wayfinding and signage could be improved on a regional scale.

Infrastructure



- Improving access for water-based businesses with public dock infrastructure, etc. could help to bring new attractions to the waterfronts.
- There are public infrastructure “dead zones” - especially in rural parts of HRM. Examples include internet, cell service, and accessible infrastructure.
- Public washroom facilities are lacking across the region.
- Investing in EV infrastructure will be important for the future.
- Ensuring cellular and internet service across the HRM is critical for the travelling public.
- Conferences and business events are looking for more off-site venues to host attendees, but not many of these venues exist in HRM.
- There is a significant lack of mid to large size venues for music and business events.

Policy Changes

- Liquor laws are archaic and require an overhaul.
  - They create challenges for all-ages events.
  - Inconsistent in interpretation and enforcement.
- Short-term rental regulations are too restrictive, especially for those operating in the rural and suburban context.
  - Understanding there is a housing crisis, feelings are that the regulations are too strict and impede economic development.
  - Need to address the shortage in accommodations in areas outside of the downtown core.
- Desire to see updates to the Motor Carrier Act to encourage and grow ground transportation options.
- Fears of retaliation within the industry for speaking out against regulations, there is a need for a neutral party to advocate for the sector.

Other Topics

- **Retail:**
  - Retail is often lumped in with restaurants and bars, but is a distinctly different business type.
  - HRM is a shopping destination - not enough promotion of this.
  - Culture around opening hours is not accommodating for tourists with many shops only open from 9am-5pm.
- **Art & Craft:**
  - Many artisans and craftspeople spread across the HRM - opportunity to promote the region for its artists.
  - Art tours of different parts of HRM (Peggy's Cove, Eastern Shore, etc.).



4.3 Existing Initiatives

The original ITMP included 28 initiatives to support and grow the tourism industry. While not all of the initiatives were achieved, 75% of them were advanced to at least a detailed planning stage.

ITMP 2030 will build on the original plan, which means ongoing initiatives may be included in the update. During the regional engagement sessions, we asked community members about the ongoing initiatives, with the goal of understanding —should we love it, or leave it? We wanted to know which initiatives ITMP 2030 should continue to focus on (do you love it?) or whether we should leave them and focus our energy and resources elsewhere.

Summarised below are the top initiatives participants love, or would rather see left behind. Throughout the regional engagement sessions, we saw a lot of interaction with the initiatives people love, but participants were more hesitant to identify the initiatives they would prefer to be left behind.

LOVE IT *Top identified initiatives to carry forward to ITMP 2030*

- **Supporting the development of Wije'winen Centre**
- **Create two events, including a signature event**
- **Action the Halifax Rapid Transit Strategy**
- **Enhance demand generators for designated arts, entertainment, and heritage districts**
- **Increase the availability of public washrooms throughout the region**

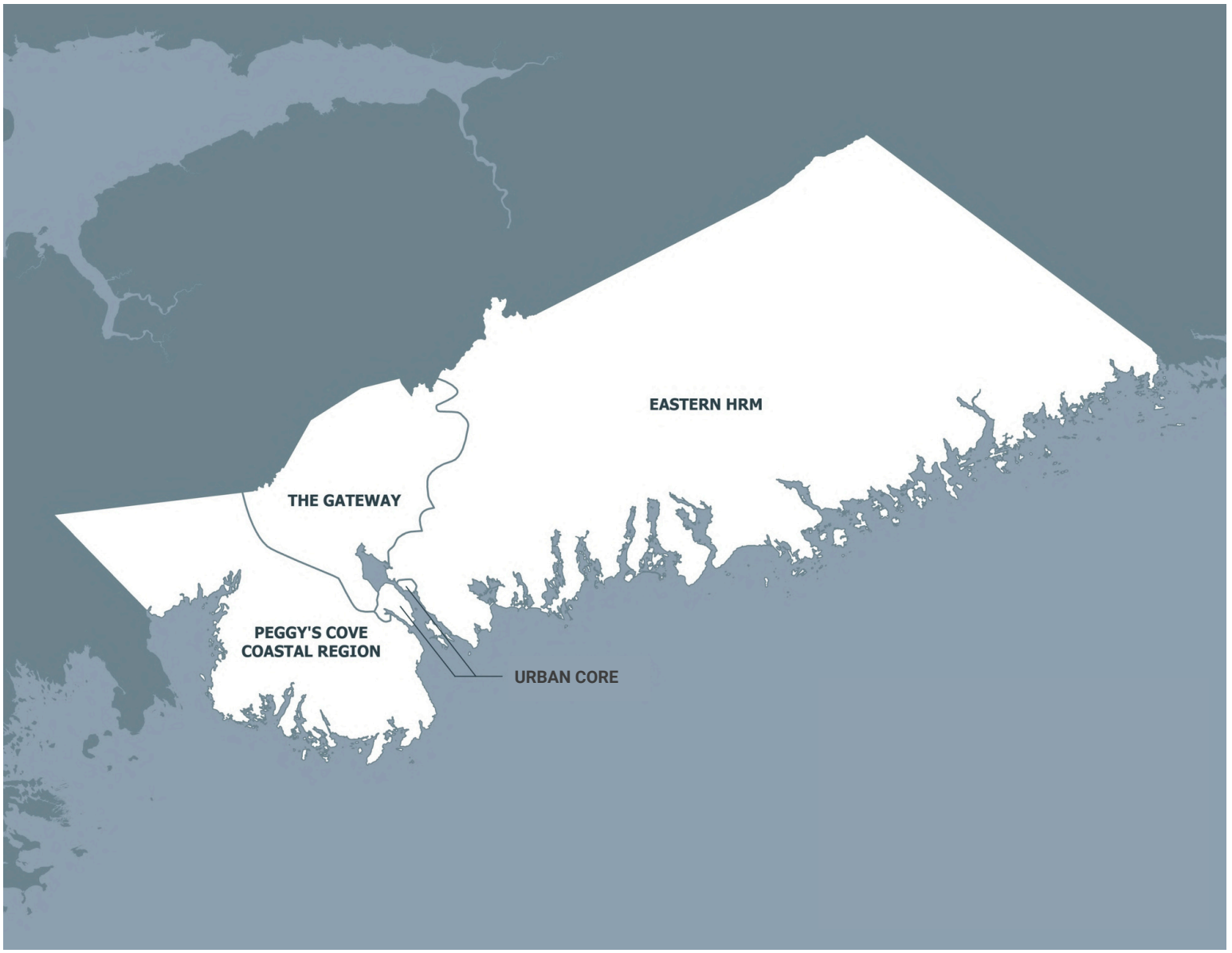
LEAVE IT *Top identified initiatives to leave out of ITMP 2030*

- **Develop a plan for sustainable growth of the cruise sector**
- **Launch Halifax Music City Strategy**
- **Support policy process for short-term rentals**



PART 5

REGIONAL THEMES



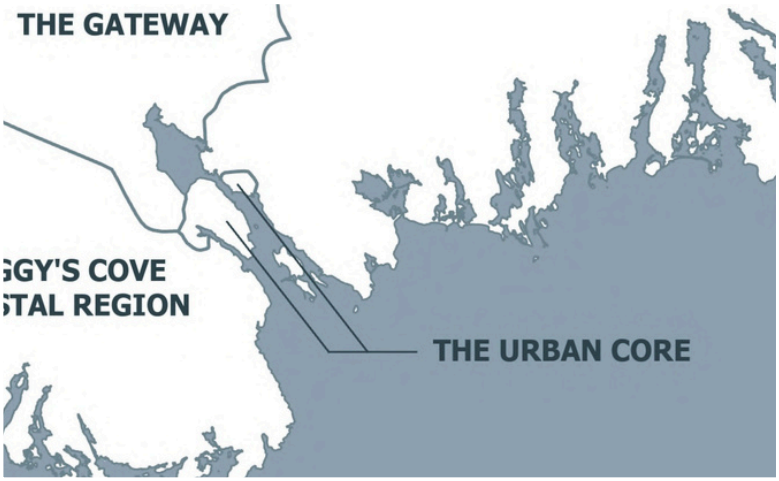
5.1 Introduction

The following section looks at the key themes that emerged across the geography of HRM. We have grouped communities into the following regions:

- **Urban Core:** Halifax, Dartmouth, Cole Harbour & Eastern Passage
- **The Gateway:** Bedford, Sackville & the Airport Area
- **Peggy's Cove Coastal Region:** Peggy's Cove, St. Margaret's Bay & Hubbards
- **Eastern HRM:** Eastern Shore & Musquodoboit Valley

5.2 Urban Core: Halifax, Dartmouth, Cole Harbour-Eastern Passage

We heard a lot about the incredible tourism assets in the urban core - bringing together a dynamic mix of history, culture, and amenities within the beautiful landscape of one of the world's most special natural harbours. Many engagement participants, from across HRM, spoke of the urban core as a huge draw for the region, citing the local food and beverage scene, key attractions like Citadel Hill, Pier 21, the Public Gardens, George's Island, the Art Gallery of Nova Scotia (among many others), and a diverse array of local businesses as some of our greatest offerings.



Some feel that the urban core is lacking in cohesive connectivity and want to see better and clearer signage throughout the area to encourage visitors to explore both sides of the harbour. There is also a desire for greater transportation options to connect the urban core to other parts of HRM.

5 Most Popular Existing Initiatives

- Create a community-led vision for the Dartmouth Waterfront
- Enhance demand generators for designated arts, entertainment, and heritage districts
- Create two events, including a signature event
- Supporting the development of Wije'winen Centre
- Increase the availability of public washrooms throughout the region



3 Least Popular Existing Initiatives

- Attract more people to skilled labour program for the restaurant sector
- Support policy process for short-term rentals
- Develop a plan for sustainable growth of the cruise sector

What opportunities exist in the area?

- Year-round tourism options, especially the shoulder seasons
- More retail offerings, especially downtown, that operate later in the day
- Better transportation options to connect to other destinations like beaches and parks
- A fully connected regional trail system
- Telling a more representative story about the region's history and celebrating the Mi'kmaw culture and history
- Recognize HRM as a shopping destination (consider incentives for keeping shops and galleries open later especially during the peak season)
- Co-locating amenities and key attractions - for example a cafe kiosk in Point Pleasant Park during the summer months



What's missing or underutilized from the local asset inventory?

- Permanent stadium at the Wanderers Grounds
- A great outdoor concert venue
- An indoor venue for 200-250 people
- An indoor venue for 1,500-5,000 people (between Scotiabank Centre and Lighthouse Centre)
- A new large capacity stadium
- Waterfront infrastructure - Africville, Purdy's Wharf, Dartmouth, Eastern Passage, George's & McNab's Islands and "port of refuge" (emergency docking areas) infrastructure for operators



Other Key Takeaways

- Embrace the working waterfront history on both sides of the Halifax Harbour

5.3 The Gateway: Bedford, Sackville, Airport Area

The Gateway region of HRM is experiencing some of the highest rates of development in all of HRM, and as the community grows, so do the opportunities for more tourist destinations and amenities. We heard about a great need for additional accommodations in this part of HRM, especially in Sackville and Bedford. We also heard about the need to improve infrastructure in this area moving forward to better facilitate the movement of people, especially when considering the new ferry service to Bedford, which would bring other transportation connection needs to allow visitors to get around.



5 Most Popular Existing Initiatives

- Support policy process for short-term rentals
- Supporting the development of Wije'winen Centre
- Create an experience development program
- Enhance demand generators for designated arts, entertainment, and heritage districts
- Attract more people to skilled labour program for the restaurant sector

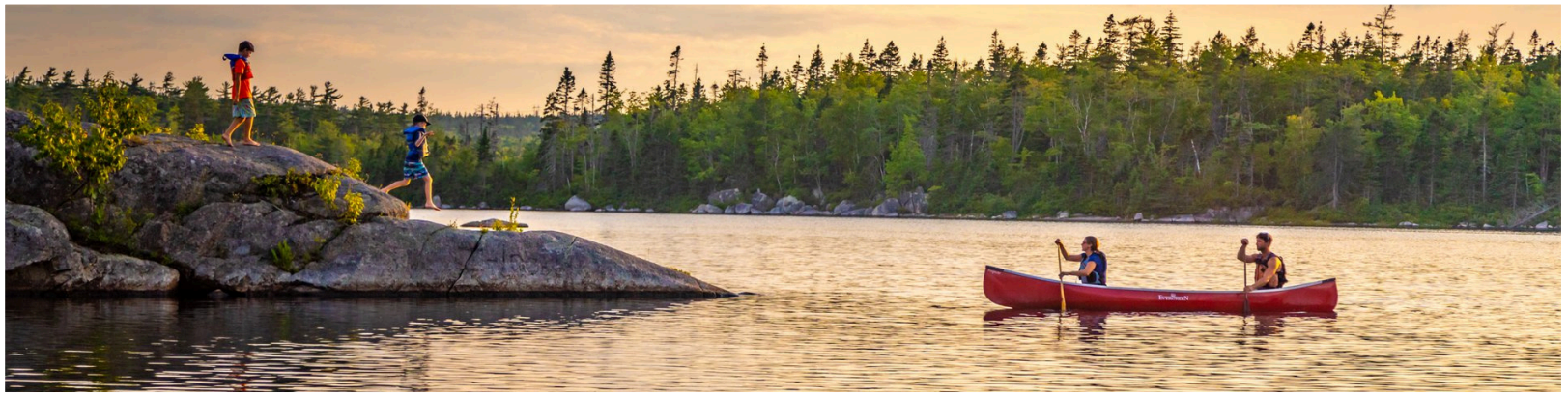


3 Least Popular Existing Initiatives

- Launch Halifax Music City Strategy
- Implement the Marine Visitation Plan
- Action the Halifax Rapid Transit Strategy

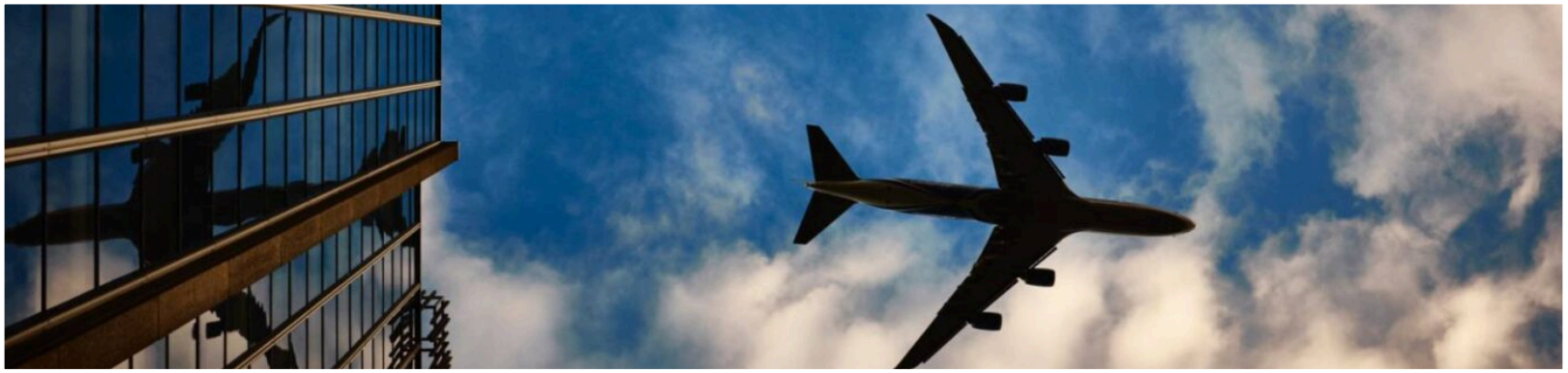
What opportunities exist in the area?

- Better promotion for the assets in this part of HRM (museums, parks, trails, restaurants, etc.)
- Need for a hotel in Sackville
- Need for a diverse range of accommodations to suit the needs of travelers
- Improving transit connectivity for residents and visitors
- Promote restaurants outside of the urban core through events like Dine Around
- B.A.T.H. - Boardwalk around the Halifax Harbour
- Events/concerts/festivals could be hosted outside of the core



What's missing or underutilized from the local asset inventory?

- Community halls are underutilized
- Aviation Museum is underutilized
- Acadia Park is underutilized
- Fultz House Museum
- Sackville Lakes Provincial Park



Other Key Takeaways

- Short-term rental regulations are negatively impacting the ability to provide accommodations in this area
- Apply a tourism lens as infrastructure investments are made in the coming years

5.4 Peggy's Cove Coastal Region: Peggy's Cove, St. Margaret's Bay, Hubbards



The Peggy's Cove Coastal Region is a beloved and world-famous tourist destination, synonymous not just with Nova Scotia, but the whole of the Atlantic Region. We heard a considerable amount about the importance of the iconic Peggy's Cove for our local tourism economy, but we also heard about the challenges that its popularity has posed to residents in the region.

Discover Halifax is currently undertaking a visitor-carrying capacity study and continues to engage with residents as part of the ITMP process. These efforts are in response to concerns raised regarding overcrowding during the peak tourism season and increasing frustration among residents about congestion and other negative impacts associated with the high volume of visitors.

However, we also heard about the incredible opportunities that exist in the surrounding area to help take the pressure off of the village of Peggy's Cove and provide more opportunities for visitors to the area to take in the local culture.

5 Most Popular Existing Initiatives

- Create two events, including a signature event
- Action the Halifax Rapid Transit Strategy
- Enhance demand generators for designated arts, entertainment, and heritage districts
- Implement the Marine Visitation Plan
- Develop a plan for sustainable growth of the cruise sector



3 Least Popular Existing Initiatives

- Support policy process for short-term rentals
- Launch Halifax Music City Strategy
- Attract more people to skilled labour program for the restaurant sector

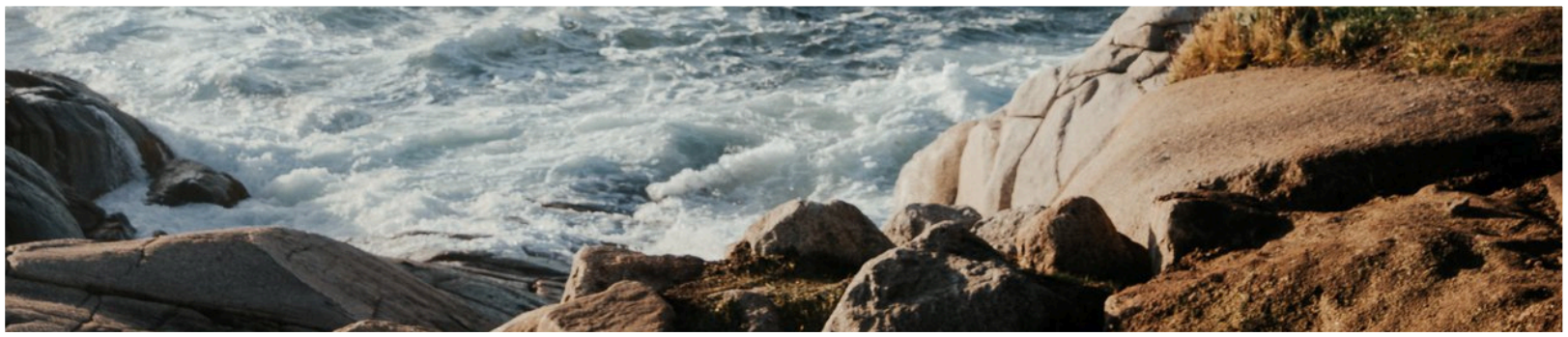
What opportunities exist in the area?

- Island and ocean excursions
- Rehabilitation of the deGarthe Museum
- Artist studio tours
- Promote the Rum Runners Trail as a biking day trip for travelers
- Providing transportation options to Shore Club events from the urban core
- Trails and coastal areas outside of the village of Peggy's Cove - promote more than just the "key attraction"
- EV charging stations are needed in the region



What's missing or underutilized from the local asset inventory?

- SS Atlantic Museum in Terrence Bay
- Transportation options - Uber does not pick up from Peggy's Cove
- Losing access to beaches due to private ownership along the coast
- Scenic pull-offs



Other Key Takeaways

- Finding ways to alleviate the pressure on the village of Peggy's Cove by spreading out attractions throughout Prospect/St. Margaret's Bay/Hubbards and promoting other parts of the region
- Desire to see busses entering the village in a more coordinated manner - timing them better so they aren't all there at once, adding to the congestion
- Short-term rental regulations are negatively impacting the ability to provide accommodations in this area

5.5 Eastern HRM: Eastern Shore, Musquodoboit Valley

We heard a lot about the untapped potential of Eastern HRM - from the rich agricultural history in the Musquodoboit Valley to the pristine coastline of the Eastern Shore. Many feel that this area is overlooked and has lacked investment to make tourism a strong economic contributor.

We heard about the possibilities for agri-tourism offerings, outdoor adventure experiences and tourism opportunities to simply take in the beauty and serenity of the area.



5 Most Popular Existing Initiatives

- Supporting the development of Wije'winen Centre
- Action the Halifax Rapid Transit Strategy
- Increase the availability of public washroom facilities
- Implement the Wild Islands Plan
- Enhance demand generators for designated arts, entertainment, and heritage districts



3 Least Popular Existing Inititives

- Develop a plan for sustainable growth of the cruise sector
- Develop the new waterfront art district for everyone to experience art and culture
- Launch Halifax Music City Strategy



What opportunities exist in the area?

- Promoting the beauty and serenity of the Eastern Shore ("where you go to get away")
- Public space improvements - making nice public spaces for people to stop and enjoy
- Dark Sky Preserve designation for the Eastern Shore
- Connecting the trail network and collaborating with the Trans Canada Trail
- Brand Musquodoboit Harbour as "The gateway to the Eastern Shore"
- Opportunity to help grow the Halifax Exhibition into a larger event
- Tours for cruise passengers to see the Wild Islands and experience local farms and restaurants outside of the downtown area
- Packaging and promoting adventure tourism offerings
- Public washrooms and EV charging stations along the eastern shore
- Space for an art gallery or artisan market
- Extended public transit service to bring people to the area (even if it was seasonal or for special events)
- Need for public boat launch facilities
- The "small hall" experience - more intimate venues, "feeling like a local"
- Establishing a seafood festival that highlights the products and local impact of the fishery



What's missing or underutilized from the local asset inventory?

- The Lupin
- The French Duck
- Community and recreation facilities (i.e. Port Dufferin)
- Tangier Ranch
- Coastal Adventures
- Norse Cove
- SUP Mushaboom
- Golf Course
- Provincial Campground at Musquodoboit Valley Provincial Park with accessible camping

Other Key Takeaways

- Short-term rental regulations are negatively impacting the ability to provide accommodations in Eastern HRM - need to find a rural solution
- Area needs a specific, tailored strategy for tourism