

BANFF & LAKE LOUISE ECONOMIC TASK FORCE PROGRESS REPORT

October 30, 2020



EXECUTIVE SUMMARY

Once it became clear that the impact of the COVID-19 pandemic would devastate the tourism economy and the communities within Banff National Park, the Banff and Lake Louise Economic Task Force began working together to deliver a phased plan to safely and effectively re-open the economy in Banff National Park.

The Task Force set five objectives to accomplish its purpose. The objectives are:

1. Safely re-open the destination;
2. Welcome visitors back to Banff National Park;
3. Protect the destination's brand reputation;
4. Coordinate communications to stakeholders; and
5. Seek opportunities to test future sustainable approaches.

There have been positive outcomes resulting from taking a destination-level approach to re-opening. Notably, the organizations were able to remain nimble through this fast-changing situation. The Task Force partners committed to sharing information and engaging in a multi-month dialogue on shared objectives in order to work together to rebuild the economy in our communities.

The Economic Task Force has been successful at achieving its objectives to date. While there has been success on all of the objectives, there is further opportunity that can be realized within Objective 5 into the future. Continuing to work together will be essential into the winter and beyond. Through vigilance and collaboration, the Task Force will continue to deliver on the set objectives and its commitment to work together through this crisis.

One thing is certain—rebuilding the economy will occur over the long-term. According to Tourism Economics in October 2020—in their work with Destination Canada and Travel Alberta—a return to 2019 economic levels is not anticipated until at least 2024.

This report outlines key accomplishments, learnings, and performance indicators tracked to report on the objectives of the Task Force. A selection of highlights and notable insights include:

1. The community worked together to re-open under guidance of health authorities. That said, the economy has not completely re-opened as the Government of Alberta has not yet moved to stage 3 of its Relaunch Strategy, resulting in some businesses continuing to remain closed. Fall and winter will need acute attention.
2. Critical services were maintained throughout Banff National Park.
3. Actions within the community resulted in people feeling safe and having a positive experience as reported in the “What We Heard” report on resident opinions about the Banff Avenue Pedestrian Zone and the Banff COVID survey results, as well as the summer Banff & Lake Louise visitor survey results.
4. Having only 15 COVID-19 cases in seven months, with no official outbreaks, helped protect Banff National Park’s brand reputation.
5. Visitor and resident compliance with safety requirements was affected by the provision of abundant information and safety messaging.
6. Visitation attributes were different from previous years, with more day-visitors and a concentration on day-use activities directly accessible by vehicle.
7. Outdoor activities in the national park and nature experiences clearly appealed to many first-time and repeat visitors during the pandemic, often as an escape from urban living and COVID anxiety.
8. Visitor awareness of and compliance with national park rules and regulations as it pertained to proper disposal of garbage was highlighted as an issue.
9. More opportunities for changing public space to allow pedestrian and cycling opportunities should be further examined as part of Banff National Park’s outdoor experiences, so people can enjoy natural surroundings and mountain vistas as a safe, appropriate, and environmentally sustainable attraction.
10. Exclusive use of digital communications to visitors, and elimination of handled materials, is effective and will be further developed.

BACKGROUND

The COVID-19 pandemic has impacted the tourism industry to an unprecedented degree. On March 16, 2020, Canadian borders closed to visitors, and the Alberta government quickly encouraged people to stay home and refrain from non-essential travel. The province, along with the country and many other places across the globe, went into lockdown. Thousands of individuals in Banff, over 80 per cent of the local workforce, were immediately out of work as businesses and services were required to close.

Banff and Lake Louise, following guidance from the Government of Alberta, worked to “flatten the curve” and help our community remain safe. This required a destination approach, and organizations and the community worked closely together to ensure the safety of the community was the top priority.

Attractions were all closed including ski resorts, gondolas, and hot springs — and Parks Canada in-person visitor services were suspended and trails and day-use areas not accessible. Tourism activities that were seen to have a high risk of transmission were closed including restaurants, retail, tours, museums and galleries, entertainment, and events. Only essential services such as food and supplies were available for residents for over eight weeks. Gas stations and some hotels remained open — Banff is a stopping point on the TransCanada Highway, providing support for people travelling between provinces, such as emergency workers and essential services. Some hotels maintained blocks of rooms in case our community needed isolation space, especially for people in shared accommodation. Many employers in the area, such as hotels and ski resorts, provide staff accommodation for their employees. They continued to provide accommodation and meals to staff who were laid off. Early reports suggested Banff had an 85 per cent unemployment rate.

With visitation to the park greatly affected by the recommendations from the provincial and federal governments to stay at home, the Banff and Lake Louise Economic Task Force was formed and has since been working closely to make sense of the pandemic, and safely and effectively re-open the economy in Banff National Park with a data-driven strategy.

The Banff and Lake Louise Economic Task Force includes:

- Karen Sorenson, Mayor and Kelly Gibson, Town Manager (Town of Banff)
- Dave McDonough, Superintendent (Banff Field Unit)
- Rick Kubian, Superintendent (Lake Louise Yoho Kootenay Field Unit) for Parks Canada
- Trevor Long, Board Chair and Darren Reeder, Executive Director (Banff & Lake Louise Hospitality Association)
- Pete Woods, Board Chair and Leslie Bruce, President & CEO (Banff & Lake Louise Tourism)

These individuals were brought together as leaders of key organizations in Banff National Park.

The group has been meeting on a regular basis since March 2020. It was important to work together to enable destination partners to respond quickly amidst the fast-changing environment, and to understand the impact of COVID-19 on the tourism industry and our communities.

Through this group, efforts continue to be made to ensure coordination of the tourism industry, Parks Canada, and the communities in Banff National Park in order to ensure that the conditions for future economic success are established. The plan created by this group supports the rebound of the local economy, and lays the foundation for long-term viability of tourism in Banff National Park. Further, protecting the destination's brand reputation, is imperative to long-term success and working together as a destination helps offer the highest level of protection.

OBJECTIVES REPORTING

Objective 1. Safely re-open the destination.

ACCOMPLISHMENTS	KPIs	KEY LEARNINGS
<ul style="list-style-type: none"> • Worked together as a community to re-open under guidance of health authorities. This includes resuming community and park services and safe access to attractions, experiences, and business operations through a phased approach. • Maintained critical services throughout Banff National Park. • Emergency support services for residents coordinated by Town of Banff Emergency Coordination Centre. • Provided supplementary guidance for Banff and Lake Louise businesses and organizations; training webinars; building signage; and collateral material to facilitate community-wide adoption of health and safety protocols for staff and customers/clients. • Residents and visitors were broadly aware of requirements for physical distancing due to comprehensive communications such as signage at Parks Canada attractions, trail heads, campgrounds and day-use areas; signage throughout downtown Banff and peripheral parks and trails; social media campaigns, advertising and media relations targeted at regional and provincial populations. • Town of Banff's area of highest density of visitors— Banff Avenue in the downtown core— was closed to vehicles to increase pedestrian space from 5,000 square-metres of sidewalks to 12,500 square-metres of space. • Able to work together to help modify visitation-driving events and programming, keeping safety as a priority. • Once visitors were welcomed, BNP remained 'open'. • Implemented a requirement for people to wear masks or face coverings inside publicly accessible buildings in the Banff townsite and outside on the densely visited 100 and 200 pedestrian areas of Banff Avenue. 	<ul style="list-style-type: none"> • To date, 15 cases of COVID-19 in Banff-Lake Louise (per ID 9 population of 13,849), with no outbreaks. • Compliance with mandatory mask bylaw on Banff Ave was extremely high - 95% compliance. • Zero business closures due to health guideline infractions. • Minimal complaints submitted for non-compliance of health and safety requirements. 	<ul style="list-style-type: none"> • Visitors and residents will support safety measures when well informed. • Training, communications and collateral material support to businesses and organizations improved compliance with provincial guidelines. • Modifications to the visitor experience (e.g. partial closure of Bow Valley Parkway to vehicle traffic) created and tested new experiences. • Transit will continue to help minimize congestion in popular areas in the summer months; but transit usage is affected by perceptions of safety during a pandemic. • Economy is not yet completely re-opened. Have not moved to Relaunch Stage 3 and some businesses have not re-opened. Fall and winter will need acute attention with a rise in cases related to Wave 2. • Perceptions of safety vary across the community, businesses and visitors. • Ability to work together and be agile through this situation benefits the community. • Due to the different municipal and provincial rules, pre-trip visitor communications about local requirements is very important.

Objective 2: Welcome visitors back to Banff National Park.

ACCOMPLISHMENTS	KPIs	KEY LEARNINGS
<ul style="list-style-type: none">• Early survey data tells us that visitors enjoyed their experience this summer and felt safe.• Digital visitor survey comments showed people were excited to plan their trip to Banff and Lake Louise.• The ability to welcome regional visitors back was aided by offering new experiences such as Banff Avenue pedestrian zone and changes to the Bow Valley Parkway.• Key destination partners provided leadership in the development and application of integrated communication strategies and approaches.	<ul style="list-style-type: none">• Park gate visitor counts: June - 30% lower than 2019; July - 16%; August - 12%; September – 1.5%.• Occupancy: June 2020 - 22%; July 2020 - 46%; August 2020 - 56% lower. (Averaged 90% June-Aug 2019)• 97% of visitors were in strong support of the Banff Avenue pedestrian zone.• Vehicle traffic to the Town of Banff for the summer of 2020 amounted to approximately 75% of 2019 vehicle traffic.• Consumption within the town was stronger than expected (garbage volume, water consumption).	<ul style="list-style-type: none">• Steadily increasing visitation over the summer indicated people felt welcome and safe.• Visitation attributes were different from previous years, with more day-visitors and a preference for day-use activities directly accessible by vehicle.• Outdoor activities in the national park and nature experiences clearly appealed to many first-time and repeat visitors during the pandemic, often as an escape from urban living and COVID anxiety.• It is important to look at different ways to reach the regional audience and keep experimenting with tactics.• Increase in incidents related to discarded garbage around day use areas, congestion at trailheads and parking lots, requiring collaboration among Parks Canada, the community, visitors, residents, businesses and agencies to ensure appropriate actions for securing garbage and removing wildlife attractants.• When any new area or experience is developed, appropriate services and amenities must be supplied.• Research on consumer sentiment was important for crafting welcoming messaging.• Agility and marketing use of consumer sentiment helped make better decisions and attract visitors.• BNP has what visitors are looking for.• With the changes in booking windows (people are booking last minute), this requires heightened agility and coordination around consumer-facing messaging.• Additional resources were required to address issues in Banff associated with COVID-related anxiety, mental health and domestic abuse.

Objective 3: Protect the destination's brand reputation.

ACCOMPLISHMENTS	KPIs	KEY LEARNINGS
<ul style="list-style-type: none"> • The community was able to keep people feeling safe and having a great experience. • Having only 15 COVID-19 cases in seven months, with no official outbreaks, helped protect Banff National Park's brand reputation. • Overwhelmingly positive media coverage of health and safety measures in place in public areas, promotion of Banff as a safe destination, and several key businesses featured for safety leadership. • Traffic volume was manageable in Banff and most of the park, including minimal issues reported related to the Bow River bridge in Banff. • Social media engagement reports show fostering of positive dialogue with followers, which helped build upon summer and remain attractive as a destination. • Task Force supported proactive "plan ahead" messaging to visitors. • Social Listening revealed a decline in negative sentiment conversations having to do with safety, crowding and congestion. • Social Listening revealed an increase in positive sentiment uses of the BLLT hashtag, #MyBanff. • Extensive advocacy efforts to federal and provincial governments helped secure aid programs for Banff businesses and residents, which are essential for a healthy welcoming destination. 	<ul style="list-style-type: none"> • Net Promoter Score: August/Sept: 68. First time visitors: 85. Repeat visitors: 63. • 97% of visitors were in strong support of the Banff Avenue pedestrian zone. • 85% of Banff residents responding to a survey said the Pedestrian Zone is good for Banff's image. • Media quality score covering Banff and Lake Louise remained high at 8.2. • Social engagements remained at pre-COVID-19 levels. • While visitation increased from July - Aug, the amount of negative sentiment conversation about the destination decreased. • 15% month-over-month positive social media conversation increase from July – Sept. • Data showed summer occupancy rate was steadily recovering in BNP compared to the rest of the country. 	<ul style="list-style-type: none"> • Close working relationship between Task Force organizations allowed efficient sharing of information, ability to nimbly react to issues and partner communication needs in a quick and meaningful way. • Operational issues with visitor behaviour still existed, even with fewer visitors, emphasizing importance of pre-trip and in-destination messaging that encouraged proper behaviour. • Traffic volumes in Lake Louise were challenging; roads closed due to volumes on numerous occasions, while mass transit was very effective in managing visitor experience and numbers. • Destination partners must find methods to manage congestion in Lake Louise. • There is opportunity to invite people here in a way that supports park values. • BLLT's social media community is made up of strong brand champions who support Banff and Lake Louise. Leverage the finding that Banff National Park has what people are looking for during a pandemic. There is opportunity to satisfy those interests, however it is important to present and respond to opportunities swiftly (wellness, health, outdoors, connection to nature remain top interests of people globally). • An increase in positive mentions with a simultaneous decrease in negative mentions could indicate a positive shift in brand reputation from July - Sept. • A unified approach to messaging and action established and strengthened Banff and Lake Louise's reputation of a safe destination.

Objective 4: Coordinate communication to our stakeholders.

ACCOMPLISHMENTS	KPIs	KEY LEARNINGS
<ul style="list-style-type: none">• Creating a local communicators working group and Economic Task Force communications group helped to align messaging for the entire destination.• Using a variety of tools to share updates across partner organizations allowed for information to quickly reach stakeholders in a coordinated approach (websites, Basecamp, email/newsletter updates, events, etc.).• Active coordination of aligned messaging (in web, social media, signage and media relations) provided visitors and residents with consistent messages addressing what they needed, and what partners had to share.	<ul style="list-style-type: none">• 365 media hits including syndicates with shared key messages.• 77 BLLT member updates sent from March-Sept, open rate averaged 45%• BLLT Member website: June 1-Sept 30: Total users: 3,427; Pageviews: 11,822• Residents surveyed reported very high awareness about COVID safety measures from local sources of information.	<ul style="list-style-type: none">• The cross section of tools helped reach stakeholders ‘where they were’ and worked to move information across the destination and communities quickly.• The responsive and collaborative approach to addressing industry and resident needs resulted in increased awareness of key updates, issues and sector changes.• The coordinated communications efforts helped extend resources for partner organizations.• A coordinated approach to multi-channel communications — using web, social media, dedicated email and call centre, media relations, stakeholder posters and in-market signage improved information to residents.

Objective 5: Seek opportunities to test future sustainable approaches.

ACCOMPLISHMENTS	KPIS	KEY LEARNINGS
<ul style="list-style-type: none">• Successful closure of Banff Avenue to vehicles fostered safe pedestrian movement and increased business opportunities for members.• Closure of roads to vehicles, creating safe cycling opportunities on Moraine Lake Road and Hwy 1A (Bow Valley Parkway) were well received.• Tested new parking directives (east/west entrance highway signage and funneling visitors by length of stay & type of visit).• Able to offer continuity of visitor services by going digital.	<ul style="list-style-type: none">• 97% of visitors were in strong support of the Banff Avenue pedestrian zone.• Daily average of 1,145 cyclists counted on the Bow Valley parkway August through Labour Day long weekend.• Absence of vehicle congestion and traffic delays on the Bow River Bridge and Mountain Avenue in Banff Avenue suggested visitors responded to parking directions within downtown Banff.• Resident survey showed support for Pedestrian Zone, with 66% reporting that it is safer for visitors; 85% reported it is good for Banff's image; 85% reported it is good for Banff business and 74% reported it is good to allow Banff businesses along Banff Avenue.	<ul style="list-style-type: none">• Innovative safety solutions trialed in the pandemic (Pedestrian Zone and Hwy 1A cycling opportunity) had positive consequences as a visitor attractant that exceeded expectations.• Businesses were able to create capacity with the pedestrian zone (i.e. additional outside seating and retail space).• Further discussion and consideration required around which businesses are able to utilize pedestrian zone (i.e. ensure it's an equitable process).• More opportunities for changing public space to allow for safe visitation, pedestrian and cycling opportunities should be further examined as outdoor experiences where people can enjoy natural surroundings and mountain vistas are an attraction.• When given the opportunity, safe cycling zones are welcome and desired.• Private offerings for outdoor experiences should be encouraged and promoted.• Digital servicing of the visitor is effective and will be further developed.• Changes in traffic management during the Banff Pedestrian Zone suggest future opportunities for pedestrianized areas are sustainable.• Sharing data is an important measure in decision-making and there is merit in considering how this can add value to the destination into the future for winter, spring and summer 2021 (and beyond).

NEXT STEPS

The Banff and Lake Louise Economic Task Force will continue to meet monthly until at least the end of 2020 to support fall, winter and beyond business activity, to manage resident and visitor expectations, and provide information on what businesses can expect moving into 2021.

The Task Force will work to understand how to best serve the visitor and our community through winter, while being responsive to visitation levels, expectations and safety.

Further examination and attention will be put to Objective 5 – Seek opportunities to test future sustainable approaches for winter 2020 and 2021. Engaging the industry in these opportunities in the development phase will help inform their operational state for the overall success and betterment of the destination.

Banff & Lake Louise Tourism will take key learnings from the Task Force's efforts and will incorporate them into its 2021 business plan and new Tourism Strategy (being developed Q1-2 2021).