



**City of Kingston
Report to Council
Report Number 19-119**

To:	Mayor and Members of Council
From:	Lanie Hurdle, Acting Chief Administrative Officer
Resource Staff:	Not applicable
Date of Meeting:	April 16, 2019
Subject:	Kingston Integrated Destination Strategy

Executive Summary:

In 2018, Tourism Kingston (TK) initiated the development of an Integrated Destination Strategy (IDS) in partnership with the City of Kingston and Kingston Accommodation Partners (KAP). The intent of the IDS is to establish priorities for the tourism sector over the next 5 years. The IDS includes input from multiple stakeholders and was completed and endorsed by both TK and KAP in January 2019.

The IDS is being presented to Council for endorsement as there are a number of initiatives to be led by the City. Some of the initiatives included in the IDS were also identified by Council during the strategic planning session.

The City-led initiatives in the IDS include:

1. Better integrate the waterfront into the downtown tourism experience;
2. Utilize the Kingston Penitentiary as core tourism zone with the inclusion of restaurants, retail and special events;
3. Conduct a feasibility study a) the use of the Leon's Centre for events including business meetings and conferences; b) a new potential venue;
4. Continue the work already in progress to attract a new market entrant and/or increase frequency at the airport;
5. Outline the business case for a downtown St. Lawrence College campus with a tourism, culinary and hospitality program including integration with Kingston tourism businesses;
6. Position Kingston as a key cruise tourism hub;
7. Support private/public partnership(s) to provide additional WiFi infrastructure in the downtown core which will provide support for tourism and visitor experience; and
8. Improve the pedestrian-friendly infrastructure in the City (alleys and spaces).

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The City will also support TK and KAP on many other initiatives outlined in the IDS.

Recommendation:

That Council endorse the Kingston Integrated Destination Strategy as submitted by Tourism Kingston; and

That Council direct staff to work through the implementation of City of Kingston led initiatives included in the Kingston Integrated Destination Strategy.

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Authorizing Signatures:

ORIGINAL SIGNED BY CHIEF ADMINISTRATIVE OFFICER

Lanie Hurdle, Acting Chief Administrative Officer

Consultation with the following Members of the Corporate Management Team:

Gary Dyke, Commissioner, Corporate & Emergency Services	Not required
Peter Huigenbos, Acting Commissioner, Community Services	<input checked="" type="checkbox"/>
Jim Keech, President & CEO, Utilities Kingston	Not required
Desirée Kennedy, Chief Financial Officer & City Treasurer	Not required

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Options/Discussion:

In 2018, TK, in partnership with the City of Kingston and KAP, retained the services of Twenty 31 to complete an IDS for the City of Kingston. Multiple meetings with stakeholders took place in 2018 and the IDS was endorsed by both TK and the KAP Board of Directors in January 2019.

The City of Kingston is a major key stakeholder in the implementation of the IDS recommendations. It is important for Council to endorse the IDS and the City-led initiatives in order for staff to prioritize and plan for implementation. Some of the IDS City-led initiatives were also identified as priorities by Council during the strategic planning session in March. Below are the City-led initiatives with an update and next steps of each initiative.

1. Better integrate the waterfront into the downtown tourism experience:

The City has planned a number of waterfront improvement projects in the downtown area over the next four (4) years including Richardson Beach, Confederation Basin Breakwater, Doug Fluhrer Park and the Closure of Ontario Street in front of Confederation Basin during July and August weekends only. The budget for the capital projects has been included in the 15 year capital forecast. Staff will look for opportunities to further this initiative through design related considerations for any waterfront development applications that come forward.

2. Utilize the Kingston Penitentiary as a core tourism zone with the inclusion of restaurants, retail and special events:

The City and Correctional Service Canada (CSC) agreed to the ongoing public tours at the Kingston Penitentiary (KP) from May until October 2019. This year, the agreement also includes access for filming on the KP property. City staff have been working with CSC to develop a multi-year agreement that would enable the use of the KP property for public tours, filming as well as a multitude of other tourism activities over the next years. It is anticipated that City staff will report back with options for the multi-year agreement this summer. The City is responsible for the liability for the use of the KP property. All net profits from tourism activities on the KP property are divided equally between the United Way KFL&A and destination marketing.

3. Conduct a feasibility study a) the use of the Leon's Centre for events including business meetings and conferences; b) a new potential venue:

This will include the hiring of a consultant to work through the 'black out times' with SMG and the possibility of securing those as times to host events. This would need to be a revolving inventory of 1-3 years in advance so that Tourism Kingston can sell the space to prospective clients. A rate sheet with visual design needs to be created so that booking coordinators can see visually what the space looks like knowing that Kingston could easily partner to host 500+ delegate conferences & events. This initiative will be funded in partnership with TK, KAP and the City. The budget will be included in a future City budget.

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4. Continue the work already in progress to attract a new market entrant and/or increase frequency at the airport:

The expansion of the Kingston airport is scheduled to be completed in May with an official opening early June 2019. With the expansion of the airport terminal and extension of the runway, air service development and customer experience at the airport will be a focus over the next year. City staff have had, and continue to have, meetings with a number of aviation businesses which could lead to the introduction of new carriers and improved service options at the airport. City staff will keep Council informed of any developments as it relates to potential new carriers.

5. Outline the business case for a downtown St. Lawrence College campus with a tourism, culinary and hospitality program focus including integration with Kingston tourism businesses:

In 2018, the City of Kingston committed funds that have secured a resource to develop a curriculum and plan for a potential St. Lawrence College campus downtown with a focus on tourism, culinary and hospitality. Work has recently begun on improving the Ambassadors program which will improve the downtown tourism experience. Further work is required over the next two (2) years on the development of the curriculum in partnership with businesses downtown. City staff will review options on how to maximize City properties to advance the development of a physical campus in the downtown.

6. Position Kingston as a key cruise tourism hub:

TK and the City will work with the Ontario Ports Coalition to ensure that Kingston is top of mind. Staff are also attending cruise trade shows to sell Kingston as a destination in order to attract more cruise lines. City staff have identified some potential for additional cruise lines at the existing Crawford dock over the next couple of years. In the meantime, staff have been reviewing options for a long term solution related to a deep water dock for cruise ships. The property located at 1 Queen Street was identified as an option but staff have been recently made aware of additional costs related to dredging and structural improvements. Staff are currently re-evaluating all options and will report back to Council. Based on discussions with TK, this is a project that has been identified for potential funding from the Municipal Accommodation Tax (MAT) in order to reduce the impact on local tax payers.

7. Support private/public partnership(s) to provide additional WiFi infrastructure in the downtown core which will provide support for tourism and visitor experience:

City and Kingston Fibre Network staff continue to work to support existing publicly-owned WiFi in the downtown core. Staff will be conducting site surveys at the Leon's Centre and Confederation Basin locations this summer to assess and improve WiFi access based on issues with current access/capacity. Future focus could include better marketing of this infrastructure and exploration of how to create a contiguous network of coverage in the downtown. The City will also be proceeding this summer with a test of tourism and

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wayfinding kiosks that provide public WiFi in the downtown core as part of the Bell IoT Pilot Project, in partnership with tourism partners.

8. Improve the pedestrian-friendly infrastructure in the City (alleys and spaces):

Establish a pilot program with TK for the closure of Ontario Street from July to August. This will include some programming of the space during those two (2) months and also allow Canada Day to have a better event presence in the downtown core. Staff are working with all key stakeholders on options and will report back to Council. Any expenses related to this initiative will be minor and will be covered through the existing operational and capital budgets. Other options to improve pedestrian-friendly infrastructure will be captured in various planning studies such as the North King's Town Secondary Plan and through the Active Transportation Master Plan (and possibly through community benefits negotiations on future development applications).

Existing Policy/By-Law:

Not applicable

Notice Provisions:

Not applicable

Accessibility Considerations:

Not applicable

Financial Considerations:

The IDS itself does not have a financial consideration, but each initiative and project will need to be considered through operational and capital budgets as well as Council reports with proposed financing models.

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Other City of Kingston Staff Consulted:

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Paige Agnew, Director, Planning, Building & Licensing Services

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Exhibits Attached:

Exhibit A Integrated Destination Strategy for Kingston



Integrated Destination Strategy for Kingston Final Plan

A tourism management plan for Kingston, Ontario.

Tourism Kingston
January 2019

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© Tourism Kingston and its partners, City of Kingston and Kingston Accommodation Partners have commissioned Twenty 31 Consulting, to complete this Integrated Destination Strategy to take Kingston's tourism industry to the next level of growth.

The information and data found in this report are current as of the date of submission to Tourism Kingston and subject to change given market forces and external variables.

January 2019

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EXECUTIVE SUMMARY

The context

With tourism booming both globally and in Canada thanks to economic growth, a surge in destination awareness driven by social media and improved access to transportation, Canada has set itself ambitious targets to grow its tourism industry over the next few years. However, these goals also present a number of challenges around sustainability of the planned growth, the availability of resources for development and the risk of displacement of domestic travellers.

In this context, Kingston has correctly chosen to develop an Integrated Destination Strategy (IDS) to better articulate Canada's Tourism Vision and to interpret it in a local context. The IDS will aim to balance growth with three key objectives – improved seasonality, visitor dispersal and increased visitor yield.

Developing an Integrated Destination Strategy for Kingston

Kingston developed its IDS in Spring 2018 based on primary research with key stakeholders, a review of background documents and a series of workshops with a steering committee. The committee's vision was to foster a collaborative environment to bring stakeholders together and to develop a strategy that builds a stronger sense of place for Kingston's residents, tourists and investors, respects taxpayer dollars, and is realistic in its approach.

What defines Kingston's competitive advantage?

Kingston benefits from a strategic location within the Toronto to Montreal corridor. It also has a youthful population associated with its three higher education institutions and associated cultural, culinary and entertainment assets. All this has allowed Kingston to develop a credible USP as a city that is unique in Canada because it is culturally vibrant, constantly evolving and authentically hip. These qualities were defined and articulated through a consultation process engaging stakeholders from all across the community that resulted in Kingston's Fresh Made Daily brand, launched in 2016. This creative brand is continuing to transform visitor perceptions of Kingston, but will fail to realize its potential to effectively position the city relative to competitors in the absence of continued communication to articulate the brand value to the whole range of stakeholders.

EXECUTIVE SUMMARY, cont'd

Governance

A common direction and shared vision is critical for destinations wishing to develop and manage tourism and benefit from a healthy tourism economy. This will involve the empowerment of a Destination Marketing/Management Organization (DMO), empowered to lead the development of tourism in the city. Kingston will need to ensure that its DMO has balanced representation among all tourism industry sub-sectors and at official level, as well as a wide range of skill sets to draw on and defined term limits.

Key assets

A consultation process and an audit of current offerings has revealed eight key assets that can be considered as Kingston's best. These are its culture and arts sector, culinary beverage and food offerings, rich history, city mobility, waterfront, sporting and recreational facilities, educational institutions, access and transport and film office. This document analyses each of these in turn and reveals consumer appeal, gaps and areas for improvement.

Segmenting travellers

Tourism organizations around the world use traveller segmentations to understand their customers better, and Ontario has developed its own Traveller Segment Profiles to identify the range of potential target audiences. Based on Kingston's USP, the most promising of these segments are Up and Coming Explorers, Knowledge Seekers and Youthful Socializers. This report identifies the interest and media engagement styles of these travellers, and suggests potential linkages between the segments where engagement efforts can be combined.

Source markets

Ontario is likely to continue to represent an important source market for travellers to Kingston, particularly given the importance of VFR and the steady increase in population of the Kingston CMA. Tourism from the USA to Ontario continues to increase, despite the weaker US dollar in Canada during 2018. Beyond the USA, the top three international source markets for Kingston are the UK, China and France, with a particular emphasis on VFR in China.

EXECUTIVE SUMMARY, cont'd

Key infrastructure

Many infrastructure projects in Kingston are underway or recently completed, and have a high potential impact for the tourism economy. These include the expansion of Norman Rogers Airport, the redevelopment of POH and KP, the creation of a downtown SLC campus focusing on tourism and hospitality the redevelopment of Princess Street and a number of projects to enhance the waterfront.

Growth potential

This report highlights three key opportunities for Kingston to increase its market share of visitors, increase length of stay and visitor spending for sustainable growth. These are to:

- pursue overseas visitor growth (leveraging Destination Ontario's marketing programs and investments)
- leverage compression (developing packages and taking advantage of high prices in Toronto, Ottawa and Montreal in key periods)
- infuse brand positioning and culture (continuing to build on the Fresh Made Daily brand to infuse core truths about Kingston into marketing).

Recommendations

Visit Kingston's overall goal is to more effectively develop and manage Kingston as a tourism destination. This report identifies four key pillars – areas in which it will need to work with partners such as the City of Kingston, KAP and others in order to deliver these goals. Within these pillars we make a total of 20 recommendations for action. The pillars are:

- Infrastructure, transportation and access
- Visitor experience, product and experience development and sense of place
- Industry development
- Policy and regulation

CONTEXT SETTING

Tourism is booming, globally and in Canada. The travel and tourism industry has experienced positive growth over the last decade, driven by three major industry trends:

- Digital and social media is broadening awareness of destinations and increasingly empowering travel consumers in the Path to Purchase
- Despite some challenges, the global and Canadian economy has been experiencing growth, resulting in positive consumer sentiment and more disposable incomes
- Access to transportation is improving across the world and in Canada especially via low-cost air carriers

This growth is a positive development for destinations around the world and especially in Canada, contributing to jobs and overall economic development. However, a large part of this growth has been concentrated in traditional gateway/destination cities/regions in Canada (e.g., Toronto, Vancouver, Niagara Falls, Banff Lake Louise) and during the summer high-season (i.e., June through September). Despite this, the Federal Government in 2017, launched Canada’s Tourism Vision designed to “bring more travellers to Canada and grow the industry”*. The Vision has three ‘ambitious targets’:

- By 2025 – compete to be a top 10 international destination
- By 2021 – increase international overnight visitors by 30%
- By 2021 – double the number of Chinese tourists

While laudable, the vision presents a number of challenges, including:

- Sustainability: Can Canada’s existing destinations, especially Kingston, manage increasing numbers of travellers in the summer high season – from a capacity, infrastructure, environmental and community perspective?
- Development: What resources are available for Canadian destinations to attract and manage these increasing numbers of travellers including from China?
- Displacement: Will these increasing number of international travellers displace Canadian domestic travellers?

CONTEXT SETTING, cont'd

Given these outstanding questions, the travel and tourism industry leadership in the City of Kingston, Ontario, have commissioned this Integrated Destination Strategy (IDS) to better articulate Canada's Tourism Vision and contextualize it for the city's local stakeholders, residents and unique issues.

Overall, the IDS has the main goal to better define and articulate both the development, well as management of tourism in the city for the next decade. Tourism growth is not the ultimate objective; rather it is the sustainable development and management of tourism to support the city's sense of place for residents:

- A place to live
- A place to raise families
- A place to attend university/college
- A place to work
- A place to invest and growth business

The IDS will also balance growth with three overarching objectives:

1. **Seasonality:** Kingston currently benefits from a high number of visitors in the summer high season; the plan is designed to nurture growth in shoulder and low seasons.
2. **Dispersal:** As a method to address sustainability challenges as well as better distribute tourism revenues throughout the community, the plan is designed to promote tourism development beyond the Kingston downtown core via infrastructure growth and itinerary design
3. **Yield:** The plan outlines consumer market targets and the need to develop/refine and promote alternative products and experiences, all designed to attract higher-value consumers and encourage more spending

CONTEXT SETTING, cont'd

The IDS includes five sections:

- **Section 1: Background** – This section provides a recap of the size and importance of the global, Canadian and Kingston travel and tourism industries utilizing current available (and historical) data and research. The purpose of this section is to highlight the size of the tourism industry and overall contribution to the Kingston economy. This is important to ensure tourism is continually supported and nurtured within Kingston.
- **Section 2: Destination Analysis** – This section provides detail on Kingston's tourism stakeholders and their roles and responsibilities around the development, as well as management of tourism in the city. Also included is a review of the city's tourism assets – both hard assets (e.g., infrastructure, products and attractions) and soft assets (e.g., history, culture and events). Taken together these 'attributes' help define and personify Kingston's destination brand.
- **Section 3: Destination Development and Management** – This section outlines the key audience and geographic markets Kingston should likely target on a forward basis.
- **Section 4: Kingston Tourism Infrastructure Projects** – This section lists the major tourism infrastructure projects in the city and how they can and will contribute to the development of the tourism experience.
- **Section 5: Strategic Recommendations** – This section describes the main strategic recommendations of the IDS.

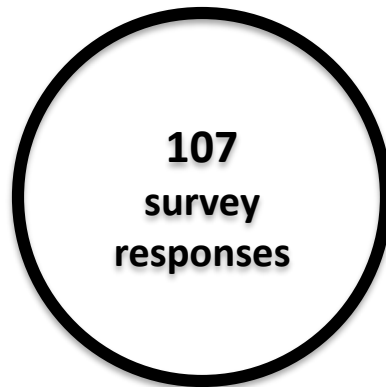
METHODOLOGY

The IDS was developed via an evidence-based research approach assessing local, regional and national market and industry conditions.

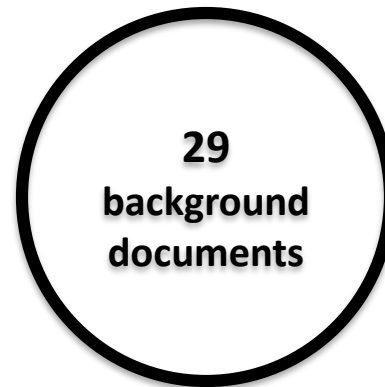
Kingston’s IDS was created based on a series of one-on-one interviews with key stakeholders, a targeted stakeholder survey, steering committee workshops, a review of background documents and desk research by the consultants. The IDS initiative was overseen by an engaged and broad stakeholder steering committee comprised of the tourism, hotel, local government, attractions and cultural community. Research was conducted in spring 2018.



Interviews were 30 minutes in length and conducted by Twenty31 Consulting Partners via telephone



The stakeholder survey was open for a four week period and was deployed to contacts by email



Documents included business plans, sales and operating plans, feasibility studies and data/analytic reports



The steering committee participated in 1) briefing and visioning workshop; 2) 2 strategy workshops; and 3) 2 IDS draft review discussions

IDS VISION AND GUIDING PRINCIPLES

A steering committee formed of key individuals from Kingston's tourism, hotel, local government, attractions and cultural community was selected to guide the development of the IDS.

STEERING COMMITTEE

The vision for Kingston's IDS initiative is to foster a collaborative environment where industry stakeholders work together and lift each other up to sustainably grow tourism as an economic driver for Kingston. A collaborative environment is achieved when all partners are working collectively toward this common goal and each individual has the confidence and support of their colleagues.

GUIDING PRINCIPLES

- ✓ The IDS is designed to develop Kingston's sense of place as a vibrant and dynamic community for residents, tourists and investors – helping to develop Kingston as a better place to live and work – with vibrant culture, music, and culinary assets
 - ✓ Kingston's IDS is based on finite financial resources and respect for taxpayer dollars
 - ✓ Resident engagement is promoted to increase positive impacts in the community
- ✓ All partners are committed to creatively assessing and contributing a range of resources to implement the IDS (e.g., knowledge, professional time, capital investment)
- ✓ Kingston's IDS is realistic with a phased approach for recommendations and performance assessment

DEFINING AN INTEGRATED DESTINATION STRATEGY

The IDS for Kingston includes a number of priority actions designed to identify and build Kingston’s competitive advantage.

Integrated Destination Strategies (IDSs) are developed after a comprehensive process of research within the destination, including consultation, feedback, planning, and review. An essential component of this process is engaged participation from local tourism organizations, tourism boards, local government, and tourism operators.

IDSs should be linked to the strategic tourism plans at the national, provincial and regional levels where possible to ensure integration, leverage marketing opportunities and create stronger partnerships including for investment.

Best practice IDSs establish a vision and set strategic direction that identifies:

- Targets (qualitative or quantitative)
- Prioritized actions with timelines
- Defined roles and commitments
- Performance indicators

These aspects have been integrated within the IDS for Kingston.



Section 1 - Background

THE IMPORTANCE OF TOURISM

Tourism is a strong and resilient sector with positive growth forecasted worldwide. By 2031, the world will reach 2 billion international travellers.

This section provides the global and local context of tourism which has informed the development of Kingston’s IDS.

THE GLOBAL LANDSCAPE

Tourism is a strong and resilient economic sector which has demonstrated uninterrupted growth over the last decade. It is seen as the key to community development, prosperity and well-being, and around the world numerous destinations have committed to tourism to drive their socio-economic progress, create jobs and diversify their economies.

According to the United Nations World Tourism Organization’s (UNTWO) long term forecast, Tourism Towards 2031, international tourist arrivals worldwide are expected to increase by 3.3% a year between 2010 and 2031 to reach 2 billion by 2031. The growth rate for North America is predicted to be 2.6% during the same period.

In 2017, international tourist arrivals exceeded the forecasted expectations, growing a remarkable 7% and reaching 1.3 billion. North American growth was 2% for the year; the United States experienced a decrease in arrivals but it was offset by strong results in Canada and Mexico. The business of tourism is booming globally.



THE IMPORTANCE OF TOURISM, cont'd

2017 was a record-breaking year for overnight arrivals in Canada. However, multiple Canadian destinations are now starting to experience over-tourism. Canada still has challenges related to improving seasonal distribution beyond the summer high-season and regional dispersal beyond traditional urban gateways.

GLOBAL LANDSCAPE, CONT'D

Europe remains the top region for outbound travel (48%), followed by Asia Pacific (26%), the Americas (17%), Middle East (3%) and Africa (3%).

The major driver of outbound travel from Asia Pacific is the Chinese outbound market, which has grown significantly in ten years. In 2017, China became the world's largest spender on outbound tourism, bumping the USA into second place. China as a source market for tourists is increasingly important for destinations, especially Canada.

TOURISM IN CANADA

Consistent with global increases in tourism, Canada has benefited from strong results as well. According to Destination Canada, 2017 was a record-breaking year, with 20.8 million overnight arrivals. The number of international arrivals from countries other than the United States also achieved a record high.

In addition to a changed visitor mix, a notable trend over the last 15 years has been a shift from low-yield to high-yield travellers and an increasing percentage of air travellers from the US. It is believed that increases to air capacity, exchange rates and a strong country brand are key factors that have contributed to international tourism growth in Canada.

The New York Times, Lonely Planet and Condé Nast all recognized Canada as a top international destination in 2017.

TOP SOURCE MARKETS FOR OUTBOUND SPENDING, GLOBAL

- 1 China
- 2 USA
- 3 Germany
- 4 UK
- 5 France

TOP SOURCE MARKETS FOR INBOUND TOURISM, CANADA

- 1 USA
- 2 UK
- 3 China
- 4 France
- 5 Germany

TOURISM TRENDS IMPACTING THE INDUSTRY

Megatrends based on social, environment and technological disruptions and changes have emerged. Destinations that want to seriously transition their tourism economies to higher-yielding markets and build a more sustainable economy are embracing these trends. Kingston's real opportunity involves an embrace of these trends and how to carve out their unique competitive advantage.

Authentic and Immersive Travel - Living like a local, knowing and understanding the culture and what makes it unique and special often with a focus on personal fulfillment. This trend partly explains the rapid growth and success of AirBnB.

Technology - The convenience of technology is increasingly becoming the norm for travellers (mobile payment, access to wifi, online booking, social media).

Sustainability - Increased consciousness of overconsumption and the environmental and social impact of tourism.

Changing profiles - Strong desire to travel from the rising middle class in emerging markets – however, traditional markets still remain strong due to retiring baby boomers and increased millennial purchasing power.

Social Status - Prestige of travel is often a key driver for emerging market travellers and travel is social currency for millennials who have a tendency to value experiences over material objects. Social media is used to document everything and is a prime method of communication and influence.

Regional and Short-Haul Travel - Building on authentic and immersive travel, regional travel focuses on getting to know and understand a particular destination(s), rather than simply being there. Short-haul experiences including getaway trips.

Accommodations - Faced with major disruption in the sector, consumers have become accustomed to a range of diverse accommodation options – from house boats to highly personalized boutique hotels.

Air Access - Increased capacity has led to more competition and cheaper flights. A significant factor has been the rise of low-cost carriers and promotion of secondary regional airports.

THE IMPORTANCE OF TOURISM

Canada’s national tourism goals are bold, aspirational and realize the potential for growth. However, the actual implementation of that growth is largely left to Canada’s provinces and municipalities to understand how to manage. Kingston’s challenge then becomes how to effectively guild the tourism industry and visitor experience to balance community and visitor expectations.



TOURISM IN CANADA, CONT’D

One in 11 Canadian jobs depends on the tourism economy. It is the top employer of youth and an important provider of employment for new Canadians and those located in local communities.

To support this vital part of Canada’s economy, Canada’s Tourism Vision launched in May 2017. The Vision is a five-year, whole-of-government approach to tourism with three overarching goals:

- Canada will compete to be one of the Top Ten most visited countries in the world by 2025.
- The number of international overnight visits to Canada will increase by 30 per cent by 2021.
- The number of tourists from China will double by 2021.

TOP SOURCE MARKETS, ONTARIO

1	Ontario
2	USA
3	Overseas Markets
4	Other Provinces in Canada

TOURISM IN ONTARIO

In 2016, the tourism industry employed over 390,000 people and contributed \$32.7 billion to Ontario’s GDP, ranking 7th as an Ontario export.

Visitor spending in the province was \$26.9 billion for 2016. Ontario travellers represented 61% of all tourism receipts, followed by overseas visitors at 18%, US at 13% and other Canada at 7%.

THE IMPORTANCE OF TOURISM, cont'd

All Canadian provincial governments recognize the importance of the tourism economy, and Ontario is no exception. The province has dedicated considerable resources to develop the capacity of the industry, as well as funding the marketing and promotion of Ontario's tourism assets and experiences. Kingston has a great opportunity to engage with the province to boost product development, consumer marketing and travel trade engagement.

TOURISM IN ONTARIO CONT'D

Ministry of Tourism, Culture and Sport

Starting with the release of Ontario's 2009 Discovering Ontario report, the Ministry of Tourism, Culture and Sport has launched a number of tools, action plans and strategies to support industry growth, including the creation of 13 tourism regions each led by a Regional Tourism Organization (RTO). Most recently, a Tourism Action Plan was released in 2015, followed by a comprehensive Strategic Framework for Tourism in Ontario in 2016, to further maximize growth and competitiveness.

Destination Ontario

Destination Ontario, Ontario's lead tourism marketer, developed a three-year strategic plan for 2018-2021 which incorporates the foundational priorities of the Strategic Framework for Tourism in Ontario.

Strategic priorities include:

- 1) Visitor First Marketing: inspiration through passions and interests, coordinated efforts to target overnight visitors, diversity of tourism offerings, leveraging Destination Canada's brand
- 2) Redefined Partnerships: More alignment and co-marketing
- 3) Strong Research, Strong Outcomes
- 4) Dynamic Organization

Growing visitor volumes and expenditures is a key objective for Destination Ontario. The target is 12 million visitors to Ontario spending \$10.4B by 2022.

THE IMPORTANCE OF TOURISM, cont'd

With a clear marketing focus and strategic engagement and investment plans, Destination Ontario is a valuable partner for destinations across the province including Kingston. While Destination Ontario has traditionally given more attention to Toronto, Ottawa and Niagara Falls, Kingston has an opportunity to leverage the provinces' cooperative marketing programs and communications activities.

Destination Ontario, cont'd

The marketing focus for 2018-2019 is primarily on couples and groups of friends; the travellers primarily driving the overnight leisure travel market in Ontario. The Canadian and US market approach and investments are based on recent research insights:

- 1) Ontario: The need to defend against competition and maintain market share
- 2) United States: Leverage Destination Canada in air access markets and engage in border markets through partnerships with Ontario destination marketing organizations
- 3) Canada: Target key Canadian markets including Quebec and British Columbia through partnerships with travel trade

At the international level (i.e., beyond the US), Destination Ontario's marketing activities take place in nine countries (i.e., Destination Canada's focus markets): United Kingdom, France, Germany, China, Japan, South Korea, India, Brazil and Mexico.

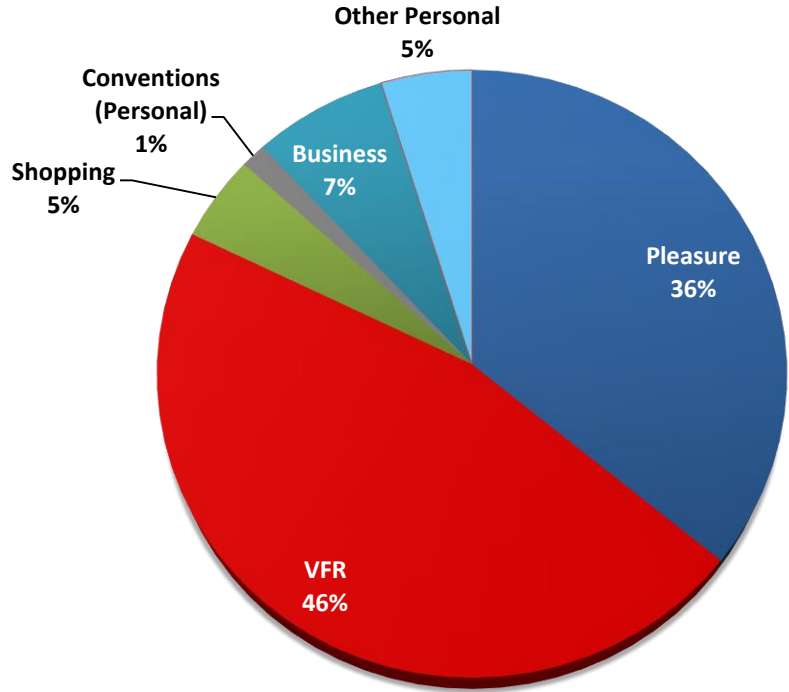
The level of engagement and investment in each market is determined through a three-tiered approach.

- Tier 1 includes the markets of Ontario, Quebec, New York City, Detroit, United Kingdom, and China, and marketing activities are undertaken in brand advertising, travel trade and media relations.
- Tier 2 includes the markets of Germany, France, Japan, Brazil, and South Korea, and marketing activities are undertaken in partnership with Destination Canada, travel trade and media relations.
- Tier 3 includes the markets of India, Mexico and the rest of Canada, and marketing activities are undertaken through media relations.

TOURISM IN KINGSTON - CURRENT CONTEXT

The majority of South Eastern Ontario travellers are visiting friends and relatives or on pure leisure (i.e., vacation) trips. Located within the Toronto to Montreal corridor and within close proximity to Ottawa, Kingston benefits from a large potential source of travel consumers.

This visitor analysis is based on research conducted at the regional level for Region 9, which is Kingston’s travel region as defined by the Ontario Ministry of Tourism Culture and Sport, due to limited visitor research available at the local level.



The geographic area of Region 9 starts at the Quebec / Ontario border in the United Counties of Stormont, Dundas and Glengarry. It travels westerly along the northern shores of the St. Lawrence Seaway to the United Counties of Leeds and Grenville and the eastern gateway of the 1000 Islands starting at the City of Brockville continuing through the Town of Gananoque to the City of Kingston. It encompasses the Township of Frontenac Islands, Township of South Frontenac, Township of Loyalist, Township of Stone Mills, Town of Greater Napanee, Town of Deseronto, Township of Tyendinaga, the Cities of Belleville and Quinte West and Prince Edward County.

There were 7.8 million visitors to Region 9 in 2016. The majority of these visits were to Friends and Relatives (VFR) followed by pleasure trips. However when looking at visitor spending, pleasure trip yields are consistently higher than VFR.

TOURISM IN KINGSTON - CURRENT CONTEXT, cont'd

The majority of South Eastern Ontario visits are mainly same-day for both domestic and overseas markets. This presents a real opportunity for Kingston to better market to and capture an increasing share of overnight visitors.

Clearly we see that the domestic market provides the vast majority of tourism spending in Region 9, although most visits are same-day. Overseas markets, while a smaller share of visitor spending in the Region 9 tourism economy, represents an important area for growth due to higher yields. For both markets the peak season is consistently July to September.

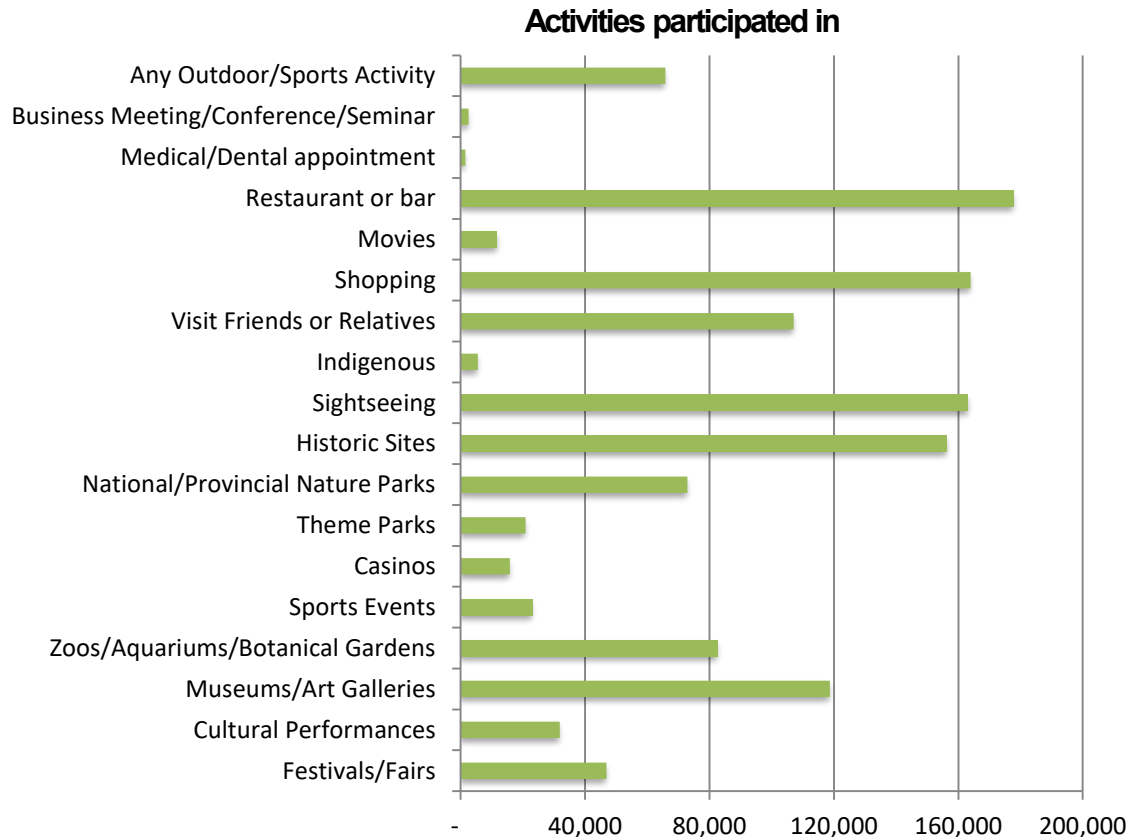
DOMESTIC MARKETS
\$761 million in total visitor spending
4.9 million same-day visits
2.6 million overnight stays
49 average age of visitor

OVERSEAS MARKETS
\$55.7 million in total visitor spending
Hotel preferred accommodation
2 Average party size
0-2 majority number of nights

TOURISM IN KINGSTON - CURRENT CONTEXT, cont'd

The top activities engaged in by overseas visitors to Region 9 suggest a strong focus on urban, cultural and historical experiences. This reinforces the potential of the city to carve out a unique destination experience around their Kingston, Fresh Made Daily, brand positioning.

The top five activities overseas visitors participated in while visiting Region 9 were: going to restaurants and bars, shopping, sightseeing and visiting historic sites and museums/art galleries. Key activities in Kingston include: 1000 Islands cruises, Penitentiary tours, Fort Henry tours, dining in the islands, trolley linking attractions, visiting one of the 20+ museums and galleries, and using the City pass (K-Pass) encompassing 17 experiences and culinary discounts.



TOURISM IN KINGSTON - CURRENT CONTEXT, cont'd

There is strong demand for Kingston's attractions and urban, cultural and historical tourism offerings. However, taken separately these do not effectively differentiate the city from myriad peer and competitive destinations. The city must therefore infuse aspects of its Kingston Fresh Made Daily brand positioning within its key marketing messages to both travel consumers and industry partners.

Key Highlights:

- There were 400 performances at the Grand Theatre and \$6 million in gross ticket sales over 10 years of City-led programming
- Fort Henry, operated by the St. Lawrence Parks Commission, celebrated an overall admissions and rentals increase of 54% between 2015-2016 and 2016-2017. This was primarily due to the creation of Lumina Borealis which hosted 59,700 visitors from 22 different countries, resulting in a \$4.7 million economic impact
- Showcasing the power of partnerships, in 2016 the St. Lawrence Parks Commission, City of Kingston and the federal government launched the first ever Kingston Penitentiary tours. In its first year there were 60,000 visitors, in its second year an astounding 105,000 people visited, generating an economic impact of \$8.42 million
- Kingston is home to over 20 museums, art galleries and historic sites that makes Kingston unique among Canadian communities
- The total economic impact of the Leon's Centre is estimated at \$16.5 million a year
- The Limestone City Blues Festival results in \$1.6 million in economic activity each year
- 16,425 people participated in guided and unguided tours of Kingston City Hall and National Historic Site
- An economic impact study by Queen's University estimated that direct spending by university visitors is \$9 million annually
- Improving conventions/tradeshows and meeting results; 300+ hotel rooms booked as a result of hosting the 2017 Ontario Museum Association Conference
- Kingston received over 20 cruise ships with 2,400+ total passengers in 2017, and the number of passengers is expected to double between 2017 and 2019

Section 2 – Destination Analysis

KINGSTON'S DESTINATION FOOTPRINT

From a geographical standpoint Kingston benefits from its strategic location within the Toronto to Montreal corridor. From a key market opportunity perspective, Kingston benefits from its unique positioning as having a youthful population attending the three higher education institutions within the city and the associated cultural, culinary and entertainment assets.

Geographically placed between three of Canada's largest cities, the US border and within the confluences of Lake Ontario, the St. Lawrence and Cataraqui Rivers, Kingston can uniquely position its destination offering as one that is culturally vibrant, constantly evolving and with a truly authentic community vibe. Key aspects of the city's geographic area, population, demographics and neighbourhoods all work in tandem to create a sense of place and a brand positioning at the heart of Kingston Fresh Made Daily.

FEATURES HELPING TO DEFINE KINGSTON'S UNIQUE COMPETITIVE ADVANTAGE AND DESTINATION POSITIONING

- **Area:** Comprising a vast land area of over 450 square kilometres, with over 280 kilometres of both rural and urban shoreline, Kingston offers a refreshing mix of natural beauty and a lively walkable downtown centre. The downtown core offers a trendy atmosphere with top culinary offerings and cultural experiences, all within a traditional setting drawing on Canada's historical architectural past.
- **Population:** While Kingston has been growing, it has successfully retained its quaint feel and charm. Based on the 2016 Census, Kingston's city population currently sits at 123,800 (with the CMA population at 162,000), making it the second largest in Eastern Ontario, after Ottawa.
- **Demographics:** The population of Kingston has a mid-range median age, are highly skilled and educated, with above average incomes. Kingston ranks as one of the best places to live in Ontario; creating a pleasant and warm experience for visitors and residents. Over 30,000 students add vibrancy and a youthful vibe each year.
- **Neighbourhoods:** There are 43 defined neighbourhoods each with their own unique features and tourism assets. However, the heart of downtown is where many of the key cultural facilities, events, and historic sites reside.

IDENTIFYING KINGSTON'S UNIQUE COMPETITIVE ADVANTAGE

The continuing development of Kingston's tourism offerings needs to be rooted in what makes Kingston unique and sets it apart from other communities in Southeastern Ontario as well as Canada more broadly. The city is rich in existing assets and resources that need to be leveraged as inspiration for the tourism industry and the Kingston experience overall.

Kingston's Unique Selling Proposition: Kingston is unique among Canadian cities as a place that is culturally vibrant, constantly evolving and authentically hip.

These qualities were defined through a consultation process that engaged stakeholders from across the community and provided the inspiration for the development of the "fresh made daily" brand.

Positioning Statement: Kingston is a city energized by the breadth of assets and resources that already exist and that continue to expand. It is a place where water meets land, where old meets new and where tradition meets innovation and creativity in ways that make it an exciting and welcoming city to live in and visit.

In fact, people have been living in and visiting this area for centuries and Kingston continues to appeal to a broad cross section of people who are attracted to a community that is so beautifully situated in the landscape, accessible in terms of its size and rich in experiences unique to this place.

History informs the Kingston experience but it is also enlivened by the youthful energy that emerges each year with the influx of thousands of students who come from across Canada and around the world to live and learn. This influx of students—together with the residents who live here—make Kingston unique because their demand for experiences rooted in food, culture and recreation creates a very special vibe.

The quality of life in Kingston is high and is attractive to people of all ages who are drawn by the opportunities that exist year-round. Exploration is key—in the city, on land and by water—and Kingston is uniquely positioned to leverage its assets and resources together with its people to attract and grow a generation of visitors who are seeking inspiration from a destination that is truly 'fresh made daily'.

VISITOR PERCEPTIONS AND THE KINGSTON BRAND IDENTITY

A clear and defined tourism brand identity has the potential to clearly position Kingston as a hip city with a unique vibe infused with culture and history. Kingston’s tourism opportunity lies not within its past, but rather in its youthful character and evolving cultural, culinary and lifestyle assets.

Kingston’s “Fresh Made Daily” brand launched in 2016 with three supporting pillars to provide a roadmap for the destination’s product development and marketing messaging. Kingston’s unique competitive advantage is interwoven into the tourism brand narrative. Winning two Ontario Tourism Awards of Excellence for marketing, this creative brand has inspired the community and it continues to shape and transform visitor perceptions. Continued communication needs to take place to effectively articulate the brand value to municipal stakeholders, accommodation providers, tourism industry operators and residents. In the absence of this, the brand will fail to realize its potential to effectively position the city relative to competitors.



Tourism Kingston, Kingston Accommodation Partners (KAP) and the City of Kingston commissioned this brand positioning project to strengthen Kingston’s presence in market, increase overnight visitation, and provide a better return on investment by reducing duplicated and conflicting messages and increase collaboration. The project involved a series of interviews with Kingston tourism stakeholders and a strategic review of research and trends in tourism. Testing with relevant stakeholders and social media influencers was conducted to ensure authenticity.

VISITOR PERCEPTIONS AND THE KINGSTON BRAND IDENTITY, cont'd

The city's aspiration for key stakeholders to speak with one voice likely needs to grow and continue in order for the Kingston Fresh Made Daily brand positioning to effectively develop and realize its potential. The brand, while nascent, has the potential to effectively differentiate the city.

Destination branding combined with effective product and experience development and marketing and communications is a continuing effort. Travel consumers with low awareness of Kingston's cultural and urban experiences may perceive Kingston's large geographic area relative to population—common in the region—as a defining characteristic, resulting in it being overlooked and described as 'boring'. The Kingston Fresh Made Daily brand has a great potential to transform perceptions of Kingston as having static assets to one with a real, authentic vibe and fresh unique feel. These attributes increasingly appeal to high-value travellers looking for getaway experiences.

In 2017 RTO9 commissioned a Travel Intentions study among Quebec households to gauge interest and travel attitudes towards the Great Waterway (i.e., the former brand for the South Eastern Ontario region). Results revealed that while proximity to Quebec made the region a great potential destination, lack of awareness of the region's offerings was the biggest barrier to booking a trip. Boldt Castle, Sandbanks and the 1000 Islands were the most intriguing attractions mentioned, yet not enough to drive potential consumers to book a vacation in the region.

At the same time, Destination Ontario research has shown that among Ontario travellers familiarity was seen to be a weakness and the root cause of travellers describing the province as less unique and/or a popular/trendy destination than other travel destinations within Canada and internationally.

As such, it can be argued that while Kingston's physical historic and geographic assets have served to grow tourism to a certain level in the past, it is the city's intangible, soft assets such as its vibe, culture and lifestyle feel that will likely increasingly help drive visitation.

KEY STAKEHOLDERS WITHIN KINGSTON'S TOURISM INDUSTRY

Kingston has an engaged and active stakeholder network committed to sustainably grow and manage tourism within the city. It is vital that the city effectively galvanize the various stakeholders with a material interest in the successful development and management of tourism under this overall strategy.

The tourism economy in Kingston is made up of many stakeholders, such as government (multiple levels), community groups, tour operators, travel agents, attractions, culinary and beverage companies, transportation companies, retailers and accommodation providers. Residents are also important especially in delivering the tourism experience.

Each of these stakeholders plays an important and vital role in developing the industry, creating growth and competitive advantage for the destination. Outlined below are the main organizations responsible for marketing, managing and guiding the tourism strategy in Kingston. Each of these groups will play specific roles around the implementation of this strategy.

CITY OF KINGSTON

The City of Kingston recognizes the value of tourism as a significant driver of economic growth. The City of Kingston takes a proactive role in promoting collaboration, strengthening relationships and investing resources to realize shared objectives. The City plays a vital role in capital development, attracting investment within the tourism industry and nurturing cultural experiences and events.

TOURISM KINGSTON (TK)

In 2017, Tourism Kingston was established as an independent organization to work closely with Kingston Accommodation Partners (KAP), the City of Kingston and tourism stakeholders in promoting tourism in Kingston. The majority of Tourism Kingston's operating funding is provided by the City of Kingston

KINGSTON ACCOMMODATION PARTNERS (KAP)

KAP's mission is to attract overnight visitors to Kingston. KAP supports destination marketing in cooperation with members and partners to attract visitors, tours and conventions to Kingston. Revenue has historically come from the Destination Marketing Fund, which KAP's member hotels and motels collected from visitors.

The consumption of goods and services by visitors supports businesses that in turn are paying commercial property taxes in the city.

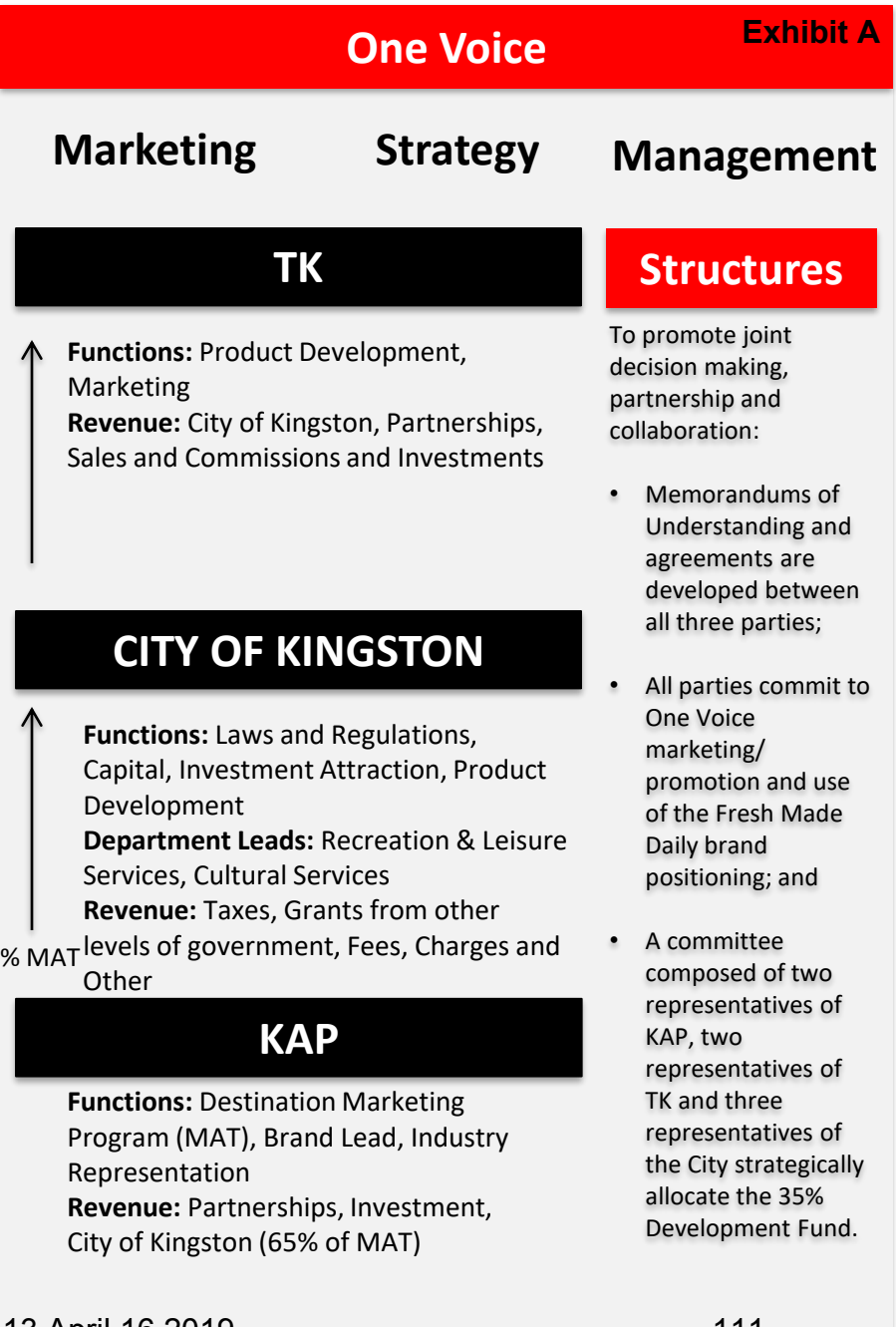
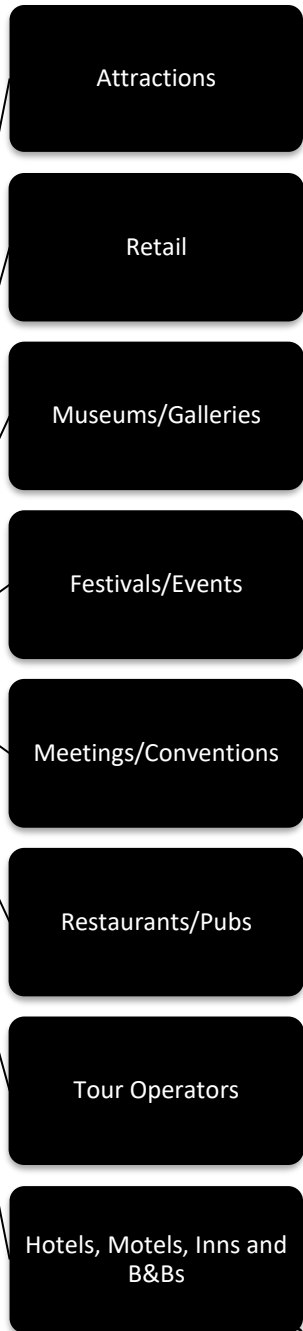
In addition to paying taxes on goods and services, visitors in Kingston pay their accommodations a 4% Municipal Accommodation Tax (MAT).

The MAT is administered and collected by KAP and distributed as follows:

1. 65% is retained by KAP for tourism marketing and promotion.

2. 35% is redirected to a Development Fund, managed jointly by KAP, TK and the City, to support product development, major event attraction and other strategic initiatives.

VISITORS



TOURISM GOVERNANCE – DEFINING BEST-PRACTICE FOR KINGSTON

Given the myriad stakeholders engaged in the development and management of tourism, governance is a key issue, but is typically overshadowed by political imperatives and/or competing interests. What is clear is that destinations that have succeeded in developing and managing tourism, and which benefit from a healthy tourism economy, have been able to effectively provide leadership and overall governance under a common direction and shared vision.

Best practice in tourism development and management in Canada and international typically involves the empowerment of a Destination Marketing (and increasingly Management) Organization, commonly referred to as a DMO. Either via city charter or an MOU among interested parties (i.e., local government, chambers of commerce, hotel association, etc.), this DMO in turn is empowered to lead the development and management of tourism in the city. To ensure accountability, as well as draw on the expertise of informed and engaged stakeholders, these DMOs have in place Boards of Directors meeting the following criteria:

- Balanced representation among tourism industry sub-sectors (e.g., attractions, festivals and events, transportation) and the accommodation industry
- The inclusion of city government and resident association officials
- All members with a material interest in the success of tourism in the city and who bring specific professional skill sets to the Board (e.g., marketing, investment, experience development and delivery, etc.)
- Defined term limits to encourage fresh ideas and perspectives

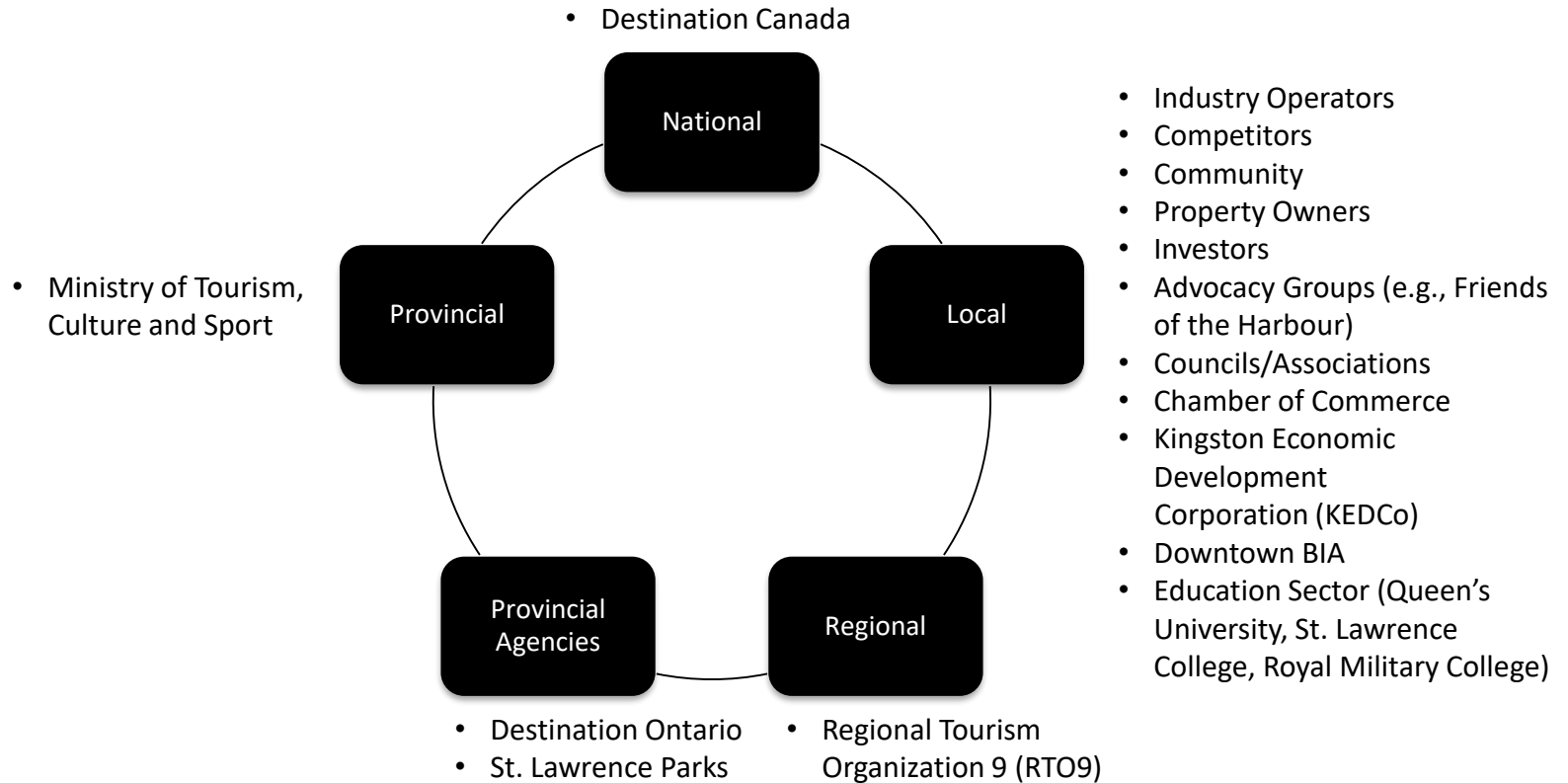
Included within the bylaws of the Board, and based on actual practice, these Boards also:

- Meet regularly according to defined schedules (e.g., monthly)
- Hold meetings governed by agendas with detailed minutes kept
- Have a clear mandate to review and input into the strategic direction and business plan of the DMO (i.e., approving the annual strategic direction and business plan)
- Approve and vet the annual budget
- Have responsibility to build partnerships among major stakeholder groups within the city

KEY PARTNERS AND INFLUENCERS

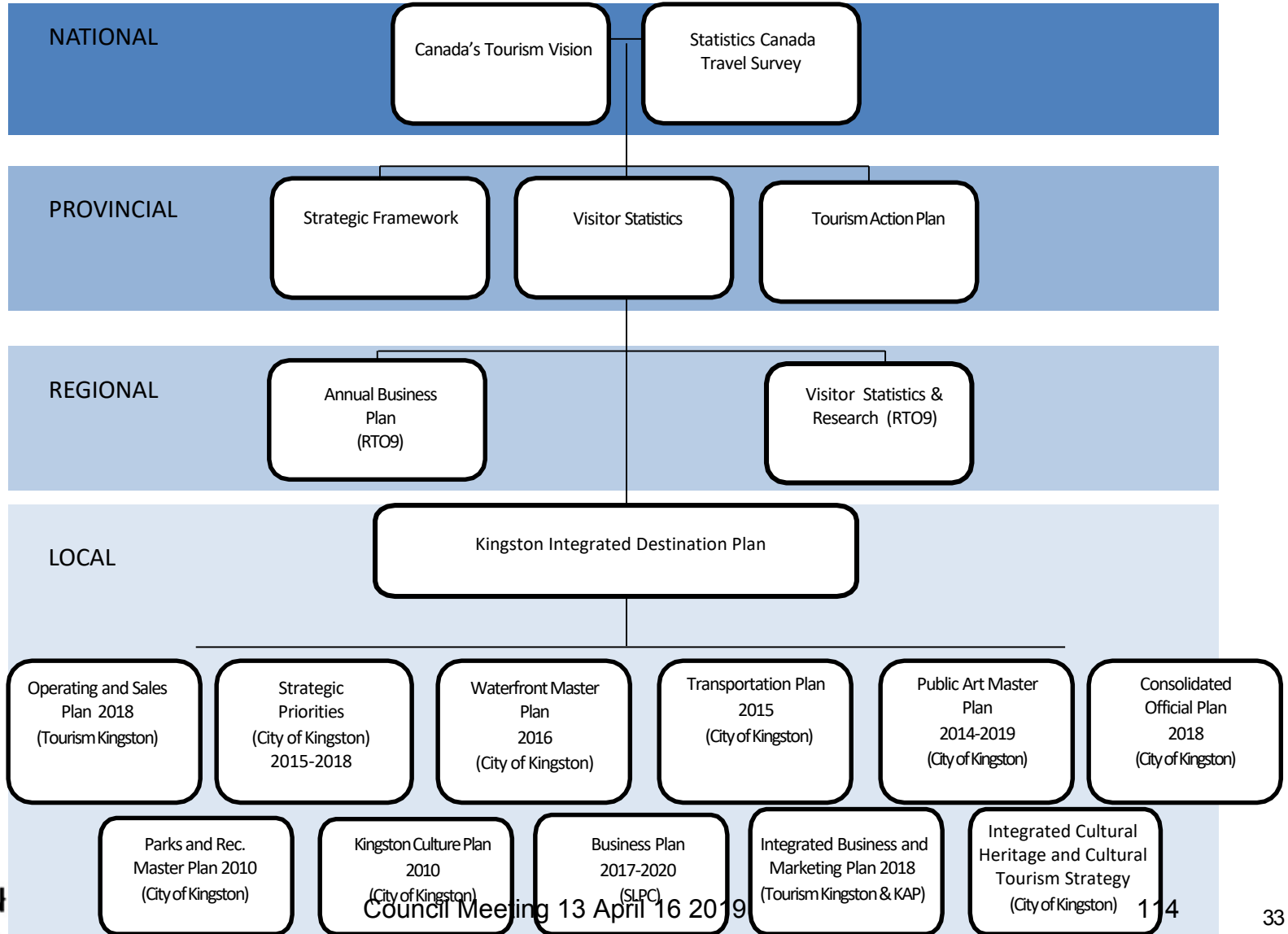
The tourism industry thrives on strong partnerships and collaborative connections. While aspects of the IDS will fall within the remit of the City and KAP, the ultimate responsibility will fall under Tourism Kingston. It will be up to Tourism Kingston to effectively engage and communicate with partners and influencers to ensure the IDS is followed and evolves.

In Kingston the following organizations are identified as the key contributors and influencers of strategy, policy and decision-making related to tourism. It is important to note that because tourism is an industry that has faced significant disruption due to visitor demands, social trends and new technology, the list of partners and influencers is constantly changing. This is a non-exhaustive list.



KEY DATA AND DOCUMENTS OVERVIEW

The IDS is influenced by a number of existing national, regional, provincial and city strategic, business and industry plans and data.



KEY DATA AND DOCUMENTS OVERVIEW - Local

New opportunities to more effectively manage and develop tourism in Kingston can be identified when other sectors understand tourism's role within the Kingston economy and broader community.

Tourism policy and strategy development can be challenging due to its multi-layered and intersecting nature. Additionally, government spending is often faced with increased scrutiny due to competing priorities and financial constraints, which creates fragmentation. These factors highlight the need for a holistic approach to developing coordinated policies and strategies that support growth in a sustainable way – for the benefit of visitors and the community.

One way to ensure this is to stress the significance of tourism to other sectors and ensure that the tourism perspective is weaved into decision making. In the context of Kingston, other sectors need to have a strong understanding of Kingston's USPs of Culture and Arts, Rich History and Waterfront, and of the overall brand positioning, in order to help create real synergies and innovative and strategic linkages between policy and implementation.

The existing master plans were reviewed to 1) assess current tourism integration; and 2) identify opportunities for a more collaborative environment. Furthermore, the resultant IDS takes into account the City's existing development plans.

MASTER PLANS

2016 Waterfront Plan

Kingston's waterfront vision is to 'be a place where all residents and visitors can participate in a variety of land and water-based pursuits along an integrated system of exceptionally designed spaces and connections that contribute to the vitality of its natural and man-made systems'. The mandate is to improve connections and access to the waterfront and increase access to lands that are not currently accessible to the public. There were 138 proposed projects organized according to six Focus Areas for urban waterfront (120 projects), Lake Ontario rural waterfronts and north rural waterfronts (18 projects). From a tourism perspective, the Waterfront Plan uncovers areas and locations for Kingston to further infuse culture and arts, and to bring more vibrancy to the waterfront.

KEY DATA AND DOCUMENTS OVERVIEW – Local, cont'd

Strategic planning processes in Kingston are well established and bring the community, government and industry together.

2014-2019 Public Art

The vision for Kingston is to ‘be known as a hub of creative place-making with an innovative program of public art that recognizes and builds on the City’s diverse history, engages its community and inspires its future leaders’. There are six public art site types identified for capital projects underlining the need for public art in new developments and renovations. Kingston’s public art programs are an exciting way to further engage the community for tourism growth.

2015 Transportation Plan

An effective transportation plan can influence access to and travel patterns within destinations. Kingston’s emphasis on transit and active transportation seeks to create connections between tourism attractions and sites of interest: enabling sustainability, alleviating pressure and creating unique product development opportunities.

2010 Parks and Recreation Plan

Responses from the Parks and Recreation Plan consultations showed that green spaces, parks and conservation areas are highly valued by residents in Kingston. Parkland requirements and outdoor recreation facilities were the key areas for recommended changes. Examples included the creation of year- round interconnected multi-use trail networks and pathways, and the provision of additional beaches. The community plays a key role in identifying ‘hidden gems’ and the most cherished assets that add to the tourism experience in Kingston.

2010 Culture Plan

The Culture Plan provides a vision for how all sectors of the community can work together to enrich the cultural life of residents, newcomers and visitors. The plan identifies investment opportunities, strategies to grow the population through culture and how to manage heritage resources and build creative experiences for authentic tourism.

KEY DATA AND DOCUMENTS OVERVIEW – Local, cont'd

The Integrated Cultural Heritage and Cultural Tourism Strategy was a key document for identifying the linkage between culture and tourism in Kingston.

MASTER PLANS cont'd

Integrated Cultural Heritage and Cultural Tourism Strategy

The Integrated Cultural Heritage and Cultural Tourism Strategy was developed to capitalize on Kingston's strengths in culture and heritage. This Strategy utilizes Kingston's history and heritage as a compelling resource and identifies culture as a cost effective way to grow the tourism market. The Strategy also outlines how to develop the cultural heritage and cultural tourism sectors, in tandem, over a 10 year period.

City of Kingston Official Plan

The Official Plan is the blueprint for the City's growth over the next 20 years. The document highlights the many features that define Kingston, and it outlines land use needs related to the urban, suburban, agricultural and rural environments. The Official Plan is a key tool for enhancing the attractiveness of the tourism environment, especially as it relates to public spaces and placemaking.

SWOT ANALYSIS: Identifying Kingston’s Competitive Advantage

This SWOT analysis is based on the influencer interviews, stakeholder survey, IDS Steering Committee Workshop and consultant research.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Historical significance to the formation of Canada • Proximity to Toronto, Ottawa and Montreal • Unique architecture and historical sites • Waterfront and accessible waterways • Vibrant, authentic and youthful urban centre with quaint feel • Thriving local culinary scene at restaurants/bars • Strong sense of community and civic pride • Strong cultural/arts sector with established venues • Prestige of Queen’s University and education sector • Military presence and history • Ranked as a top city for sport hosting in Canada • 1000 Islands • Critical mass of experiences • Downtown scale and walkability 	<ul style="list-style-type: none"> • Perceived as a summer destination • Majority of visits same day or one night • Low consumer awareness about products and experiences • Few packages and no central booking system for packages • Limited opening hours (attractions and local shops) • Lack of diversity (residents, language, marketing, workforce) • Uncompetitive transportation options (unreliable air service, slow trains, few rentals, trolley and cruise capacity) • Lack of innovation in story telling • Unclear leadership roles in industry (who’s doing what) • Inconsistent marketing messages • Data gaps related to existing and potential visitors (i.e., Kingston specific data) • Untapped waterfront potential • Poor customer service and first impressions • Tourism offerings mostly centred in downtown core
Opportunities	Threats
<ul style="list-style-type: none"> • Leverage neighbourhoods outside the downtown core as tourism areas to be developed, especially Portsmouth Village and North Kings Town • Engage with education sector to develop a customer service program (tourism ambassadors and training) • Develop multi-lingual signage and greetings • Conduct visitor market research • Increase packages • Define roles and improve collaboration between stakeholder organizations, community and industry to enhance tourism leadership • Develop an air access strategy to increase tourism • Develop and grow the events and sport hosting sector to provide year-round offerings • Continue research to support expansion of infrastructure and services to develop a stronger cruise sector 	<ul style="list-style-type: none"> • Competing priorities of tourism stakeholder organizations • Competition from other Ontario, US border or Quebec destinations • Skilled labour shortages • Reduced funding for marketing, heritage/cultural and arts sectors relative to competitive destinations

KINGSTON'S UNIQUE SELLING PROPOSITION

The goal is to ensure that when people hear 'Kingston' they associate it with the city's USPs, which in turn differentiate the experience and offering.

The unique selling proposition (USP) is what makes a visit to Kingston special. The experiences that define Kingston and set it apart from the competition range from both tangible, intangible, active and passive. Key USPs include: the City's rich history & heritage (heritage/legacy includes the historic architecture, UNESCO designation, Fort Henry, the Towers, Cedar Island; and a 'big city culture' with vibrant dining options, cultural assets and youthful energy. Key attributes that support Kingston's USP include:

Culture and Arts

- The home for impassioned curators and creators
- At the forefront of creative and culinary arts
- Celebration of artisans
- Independent boutique shops
- Combination of well known and small eclectic venues
- Local and artisanal restaurants/bars
- Festivals, Events and live music
- Young city vibe from changing student population
- Historic Sites

Rich History

- An incubator community and innovation hub
- Celebrates 'different'
- Stunning architecture, streetscapes and districts
- Embrace of creativity and innovation in design
- Gathering place for many
- Strong customs and traditions

Waterfront

- 1000 Islands
- Sightseeing, dining and entertainment cruises
- Extensive and accessible waterways

Regional Assets (Close proximity)

- 1000 Islands
- Inland lakes throughout Frontenacs
- Growing wineries and breweries among other culinary attractions throughout Prince Edward County

KINGSTON'S KEY ASSETS

Analyzing Kingston's key assets can reveal consumer appeal, gaps and areas for improvement.

As an evolving industry, the nature and definition of tourism assets continues to change. Traditionally, assets have focussed heavily on the supply side of tourism to lure and entice visitors (e.g. hardware/tourist attractions). However, this approach is now shifting to incorporate a more holistic view that also values software (e.g. experiences) as a powerful component of successful destinations. While hardware/tourist attractions remain an important aspect of stimulating interest and awareness, experiences create excitement and help to influence satisfaction and future travel behaviour.

With feedback received from the stakeholder survey, key stakeholder discussions and an audit of current experience, product, attraction and service offerings eight assets have been identified as Kingston's best.

- Culture and Arts Sector
- Culinary, Beverage and Food offerings
- Rich History
- City Mobility
- Waterfront
- Sporting and Recreational facilities
- Educational Institutions
- Access and Transport
- Film Office

KINGSTON'S KEY ASSETS, cont'd

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
Culture and Arts Sector	<p>Kingston's Culture and Arts Sector is defined by:</p> <ul style="list-style-type: none"> A mix of well-known museums, performing arts venues and small independent venues. A variety of eclectic galleries showcasing the artistic talent of emerging and established artists. Festivals and events throughout the year that showcase artisans, curators and makers from all realms. Live music events happening multiple times a day everyday in the city. Exciting and creative Culinary, Beverage and Food offerings at restaurants and pubs. 	<p>The Culture and Arts Sector creates the emotional connection and authentic experience for visitors.</p>	<p>Tourism market readiness and the communication of offerings is the most notable gap.</p>	<p>Continue efforts to support creativity in the community and engage residents to uncover new products and experiences.</p>
		<p>The Isabel Bader Centre for the Performing Arts and Tett Centre for Creativity and Learning are two high quality waterfront arts venues that support learning and creativity.</p>	<p>Downtown spaces are being underutilized (e.g. alleyways, parking lots).</p>	<p>Help visitors to explore through increased visuals, videos, itineraries and packages.</p>
		<p>Festival events are clustered to create year-round product.</p>	<p>Diversity is limited.</p>	<p>Use existing downtown spaces in innovative ways to make the City more inviting (e.g. alleyway art or pop-up culinary vendors, public art).</p>
		<p>An extensive collection of historical and contemporary Canadian art, including the permanent collection at Agnes Etherington Art Centre.</p>	<p>There are a limited number of museums, art galleries and historic sites that are open year round to visitors.</p>	<p>Increase festivals, events and live music offerings.</p>
			<p>There is no culinary training program within Kingston.</p>	<p>Increase the presence of public art in key locations around the City, including the downtown core.</p>
			<p>There are no professional training programs in Kingston that support the museum/heritage sectors.</p>	<p>Develop a year-round market with extended hours.</p>

KINGSTON'S KEY ASSETS, cont'd

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
Rich History	<p>Built heritage resources and historical sites are a visual reminder of Kingston's past. This is supported by downtown Kingston's over 300 designated historical properties.</p> <p>What helps to create Kingston's real and authentic vibe is its history as a meeting place and home to many.</p>	<p>The ways visitors absorb the rich history of Kingston is through its people, its attractions and historic sites. Kingston's history will be clear to see for visitors who explore the City via Trolley Tours, public transit, cycling or walking and tourism experiences such as tours.</p>	<p>While progress has been made to position Kingston through the Fresh Made Daily brand, the tourism industry largely associates Kingston with the story of Canada and the traditional storylines of 19th century history, as evidenced through the stakeholder survey results.</p> <p>The story of Kingston's rich indigenous and immigrant connections is not currently being told through marketing efforts.</p>	<p>The tourism industry needs encouragement and support to develop new stories and elevate consumers and the travel trade's understanding of Kingston's rich history. Ways to achieve this include:</p> <ul style="list-style-type: none"> • Being consistent with the Fresh Made Daily brand positioning; and, • Integrating stories cohesively into programming and technology. <p>The powerful and complex aspects of Kingston's history need to be highlighted to connect on an emotional level with a wider range of travellers.</p>

KINGSTON’S KEY ASSETS, cont’d

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
City Mobility	<p>According to Walk Score® index downtown Kingston is considered a “walker’s paradise”.</p> <p>The City’s focus on active transportation has led to important public transit improvements and actions to promote cycling and walking. Furthermore, Dropbike – the smart and low-cost bike share program – was recently piloted, and in its first year there was strong demand at 6,185 rides.</p> <p>In addition to walking and cycling options, Kingston Trolley Tours has eight stops at Kingston’s tourist attractions in a hop-on-hop-off style tour.</p>	<p>Across Ontario and globally, there has been a notable shift towards more walkable urban landscapes. Investments that create more attractive, accessible, safe and sustainable environment, especially in the downtown core, are appealing and beneficial for residents and visitors alike.</p> <p>Kingston Trolley Tours has a vintage and nostalgic appeal.</p> <p>Kingston’s City Pass (K-Pass) integrates attractions with existing transportation options.</p>	<p>Current marketing is limited with respect to communicating the ease of access to tourism attractions and amenities, especially in the downtown core.</p> <p>Key built heritage resources and cultural resources are being underutilized.</p>	<p>The marketing message should highlight how easy it is for visitors to travel around the city by letting them know about the options available and associated prices; helping to overcome any perceived challenges about visiting Kingston.</p> <p>Continue efforts to ensure development is focussed on pedestrians and active transportation with the use of built heritage and cultural resources to create new experiences. For example, transform Market Square and the four surrounding blocks into a pedestrian only area during peak season.</p> <p>Trolley Tours can also be used in innovative ways such as transporting visitors for tradeshow/conventions and meetings.</p>

KINGSTON'S KEY ASSETS, cont'd

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
Waterfront	The confluences of Lake Ontario, the St. Lawrence River and Cataraqui River place waterfront at the core of Kingston for visitors and the community.	The variety of water-based activities (e.g. freshwater sailing), 1000 Islands/cruises, Kingston Harbour, indigenous and eco-tourism experiences are the key means for Kingston's visitors to develop a connection to the water.	<p>Inadequate access points and public spaces along the waterfront for activities.</p> <p>Low awareness of amenities in public spaces and parks along the waterfront.</p> <p>Indigenous and eco-tourism experiences are limited, and where they do exist, communication/marketing is limited.</p>	<p>With recent progress made to revitalize waterfront parks, trails and cultural venues there is still a strong need for more public spaces and access points to create inviting spaces along the waterfront.</p> <p>The infusion of culture and arts into the waterfront will help to build the inviting and creative spaces that compel visitors to stay in the destination longer. Examples to achieve this goal include:</p> <ul style="list-style-type: none"> • Live music • Festivals and events • Makers markets • Public art tours • Movie screenings • Etc.

KINGSTON’S KEY ASSETS, cont’d

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
Access and Transport	<p>Kingston’s strategic location is less than three hours away from three of Canada’s largest cities and 130 million North American consumers are within a day’s drive. There are six primary ways Kingston can be reached:</p> <p>Car – Accessible along Highway 401</p> <p>Bus – Operations by Coach Canada, Megabus and Greyhound</p> <p>Train – Operations by Via Rail with most serviced station in South Eastern Ontario</p> <p>Plane – Kingston’s Norman Rogers Airport offers access from the Toronto market through Air Canada with seven flights a day</p> <p>Boat – There are two city owned and one private marina</p> <p>Public transport – Kingston Transit</p>	<p>There are lots of different ways to get to Kingston. For those arriving by car, there are free Park & Ride lots and Kingston Transit offers multi-ride and weekly passes.</p> <p>Norman Rogers Airport provides a direct link to international transfers via Toronto with a less than one hour long flight.</p> <p>The train and bus stations are conveniently located and close to the downtown core.</p>	<p>There have been some concerns about parking space.</p> <p>The public transit network is focussed mainly on local needs.</p> <p>Norman Rogers Airport is undergoing \$16.1 million upgrade work to facilitate air service growth – clear opportunity to fill capacity with greater frequency and/or new market entrants.</p> <p>Marketing collaboration with Via Rail.</p> <p>Shuttle services from airport, bus/train station.</p> <p>Online reservations for transient boaters.</p> <p>Awareness of US link via ferries.</p>	<p>The proximity of Kingston to Toronto, Ottawa and Montreal and the US border needs to be top of mind for consumers and the travel trade.</p> <p>Significant efforts need to be made to increase awareness about how fast the journey to Kingston is; highlighting the practical elements and suggested itineraries to help visitors build their trip.</p>

KINGSTON’S KEY ASSETS, cont’d

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
Sporting and recreational facilities	<p>There are nine multi-purpose sports venues and over 100 sports facilities.</p> <p>From 2017 onwards Kingston hosted 26 National Championship (17) and International Events (9).</p>	Visitors enjoy state of the art venues in a vibrant city.	<p>The vibrancy of the city and access are being undersold.</p> <p>Great potential of the Leon’s Centre to host additional sporting events.</p> <p>Data analysis of sports tourism success.</p>	<p>Kingston should consider diversifying into other sports events beyond hockey and utilize the full spectrum of sports and recreation facilities to provide capacity for higher-yielding events such as tradeshows/conventions and meetings at larger venues.</p> <p>Create a Sports Tourism ‘concierge service’ to provide a seamless experience for event organizers.</p>

KINGSTON’S KEY ASSETS, cont’d

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
Educational Institutions (e.g., Queen’s University, St. Lawrence College and Royal Military College of Canada)	<p>Kingston’s educational institutions are world-class and they play a critical role in supporting the knowledge-based economy of Kingston.</p> <p>These assets support the attraction of educational visitors, meeting workforce demands and adding a youthful feel to the community.</p> <p>Together, the local campuses bring +30,000 students to Kingston each year.</p> <p>St. Lawrence College’s tourism, culinary and hospitality programme and potential downtown campus has enormous potential to create a highly skilled workforce for Kingston, the region and Canada and also boost the training and service excellence of the local industry.</p>	<p>These institutions are highly regarded internationally.</p> <p>Queen’s has a beautiful waterfront campus with limestone buildings, a gallery and engaging archives.</p>	<p>Engagement with the education sector to achieve tourism goals.</p> <p>Tourism marketing for VFR.</p> <p>Collaboration with education sector to increase meetings, conventions and tradeshow.</p>	<p>Continued engagement with the education sector is vital for supporting workforce needs and training initiatives. Customer service, hospitality, culinary, technology, co-operative training, and innovation are key focus areas that can be developed further.</p> <p>Consider the use of packages to drive VFR visitation through the student population.</p> <p>Create a representative position for each institution to engage in tourism development.</p> <p>Leverage Queen’s international leadership position.</p>

KINGSTON’S KEY ASSETS, cont’d

Key Asset	Description	Consumer Appeal	Gaps	Our Perspective
Film Office	Kingston’s Film Office officially launched in 2018 to attract and support film production in the City. The Film Office is currently responsible for film permitting for all City properties.	Visuals can provide a lasting impression and increase desire to visit by adding to the destination’s image.	<p>While taking into consideration that the Film Office is newly-developed, there are notable gaps in the integration of films with consumer marketing, logistical support and customer service.</p> <p>A skilled labour pool is required to support production needs.</p>	While there are short term financial benefits for film tourism, there are potential longer term visitation effects if used strategically for promotion pre- and post-filming. There are examples of this being done successfully in the United Kingdom and New Zealand (e.g., hot spots, movie-tie-ins etc.). From a competitiveness standpoint, Kingston should continue improving logistical supports for the film industry, secure access to film locations such as the Kingston Penitentiary and create a St. Lawrence College (SLC) film industry training program. From a customer service perspective, strive to be exceptional when working with the film industry (i.e., timely, professional and responsive through a ‘concierge service’ similar to Tourism Toronto).

Section 3 – Defining Kingston's Markets

- Kingston's High Priority Audience Markets
- Kingston's High Priority Geographic Markets

TRAVELLER SEGMENTATION

Understanding travel behaviour and consumer values helps destinations to engage with existing and potential visitors.

Around the world, tourism organizations and businesses use traveller segmentation to understand their customers better.

The underlying concept of segmentation is that while all travellers are different, they can be sub-grouped based on shared characteristics such as demographics, geography or psychological factors. This data can be extremely useful in developing a deeper understanding of what consumers want and who is most likely to buy a product, in turn helping to create more targeted marketing strategies in a more efficient way, with respect to marketing dollars.

Within Canada and Ontario, the two most commonly adopted traveller segmentation models used today are Destination Canada’s Explorer Quotient (EQ) and Destination Ontario’s Traveller Segment Profiles.

	Explorer Quotient (EQ)	Ontario Traveller Segment Profiles
What is it?	Destination Canada developed 13 EQ Profiles for different source markets to help small- and medium-size businesses focus product development, marketing and sales efforts. The EQ provides a deep understanding of the profile and travel behaviours of a destination's best prospective customers.	Destination Ontario developed its own segmentation model – which is largely aligned with EQ – for Ontario destinations and businesses. There are 12 unique Traveller Segment Profiles which were derived from the North American travel population.
Why use it?	EQ enables us to understand why people seek out certain types of travel experiences in order to help develop more insightful truths about how a destination can be relevant, engaging and meaningful as a vacation destination.	Traveller Segment Profiles include travel motivations and interests, media habits and demographics to help businesses engage more effectively with customers, improve marketing and increase industry alignment.
Resource Link	https://www.destinationcanada.com/en/tools	https://www.tourismpartners.com/en/research/traveller-segment-profiles

TRAVELLER SEGMENTATION

Kingston's most promising segments, based on its USPs, are Up and Coming Explorers, Knowledge Seekers and Youthful Socializers.

While EQ has been embraced by many of Canada's travel trade and major operators, driving alignment with Destination Ontario by adopting Ontario's Traveller Segment Profiles has greater potential benefits for Kingston for these reasons:

- Better ability to communicate with Ontario's receptive target audiences
- More engagement with Destination Ontario and other industry partners to develop joint marketing and communications partnerships
- Enhanced ability to leverage in-market activities and programmes through partnerships with Destination Ontario

Of the 12 unique Ontario Traveller Segments developed there are three categories that hold the most promise:

1. Up and Coming Explorers
2. Knowledge Seekers
3. Youthful Socializers

The following pages identify the interests and media engagement styles of these travellers.

IDEAL ONTARIO TRAVELLER SEGMENTS

Traveller Segment	Key Profile Highlights	Audience Targets	Reasoning	% of Travellers	% of Spend
Up and Coming Explorers	<p>Travel is often focused on major attractions and iconic places and they begin with what is nearby. Exploring, learning and feeling excited are core benefits of travel for this group.</p> <p>Consists of young families, aged 25-34 with kids and couple with no kids.</p>	VFR Potential Visitors (couples, families)	This segment will primarily be drawn to the iconic nature of the 1000 Islands but with help they can be guided to explore.	9%	14%
Knowledge Seekers	<p>Driven by a desire to explore culture, history, architecture and natural landmarks. These travellers often focus on museums, galleries, historical sites and sightseeing.</p> <p>Mostly couples 55+ years of age, tend to have an above average travel budget.</p>	VFR Potential Visitors (couples, families)	This is a good segment for Kingston’s performing arts venues, galleries, historic sites and architecture etc.	7%	11%
Youthful Socializers	<p>Having fun, socializing, and feeling connected with close friends are the key drivers.</p> <p>This is a typical youth and student travel segment. It is comprised primarily of young single women aged 18-34 with lower than average income and travel budgets.</p>	VFR Potential Visitors (groups of friends)	This is a prime segment for Kingston’s culture and arts, nightlife, concerts, events and entertainment scene.	10%	7%

UP AND COMING EXPLORERS

Travellers in this segment are looking to explore, learn and visit major attractions. They want to feel “excited /exhilarated” while on vacation and their travel experiences are likely to start with a core attraction and expand from there. More than half of the travellers in this group are a visible minority and/or immigrant.

Up and Coming Explorers Demographics



FAMILIES*

AGE RANGE

25-40

9% OF TRAVELLERS

14% OF TRAVELLER SPEND

Up and Coming Explorers Interests

57% visited major attraction

71% see learning as core benefit

44% want to feel exhilarated & excited

Up and Coming Explorers Engagement



* This also includes millennial couples without kids

KNOWLEDGE SEEKERS

Travellers in this segment are looking to understand and appreciate the places they visit, and are more interested in stimulating their minds than resting and relaxing. They are driven by a desire to explore culture, history, architecture and natural landmarks and often focus on museums, galleries, historical sites and sight-seeing.

Knowledge Seeker Demographics



AVERAGE AGE

55+

COUPLES



Knowledge Seeker Interests

81% knowledge & culture

93% museums / places of interest

90% local architecture

Knowledge Seeker Engagement



YOUTHFUL SOCIALIZERS

Travellers in this segment are looking to have fun and unwind on vacation. They prefer to travel with close friends and have higher energy levels than other travellers. Spending time in a group and shared experiences are highly valued.

Youthful Socializer Demographics



AGE RANGE
18-34

GROUPS OF FRIENDS

10% OF TRAVELLERS

7% OF TRAVELLER SPEND

Youthful Socializer Interests

- 26% nightclubs / entertainment**
- 77% adventure in vibrant cities**
- 60% visit friends / relatives and have social events**

Youthful Socializer Engagement



IDEAL ONTARIO TRAVELLER SEGMENTS, cont'd

Acknowledging the subtle nature of each segments interests and drivers can combine engagement efforts.

Like all research, there are some caveats to note regarding the segment data:

- Actual trip interests and drivers specific to each segment can be rather subtle – Kingston can likely use the same content marketing strategies, tactics and messaging when engaging groups (i.e., they can be treated as not mutually exclusive).
- Travel motivators are based on myriad criteria, thus, multiple activities and experiences could be combined within one campaign or communications tactic to stimulate interest in Kingston (i.e., focus on highlighting a ‘basket’ offering).

Examples of potential linkages between the segments are:



Description: Millennial families and couples with no kids looking for adventure and high-energy experiences



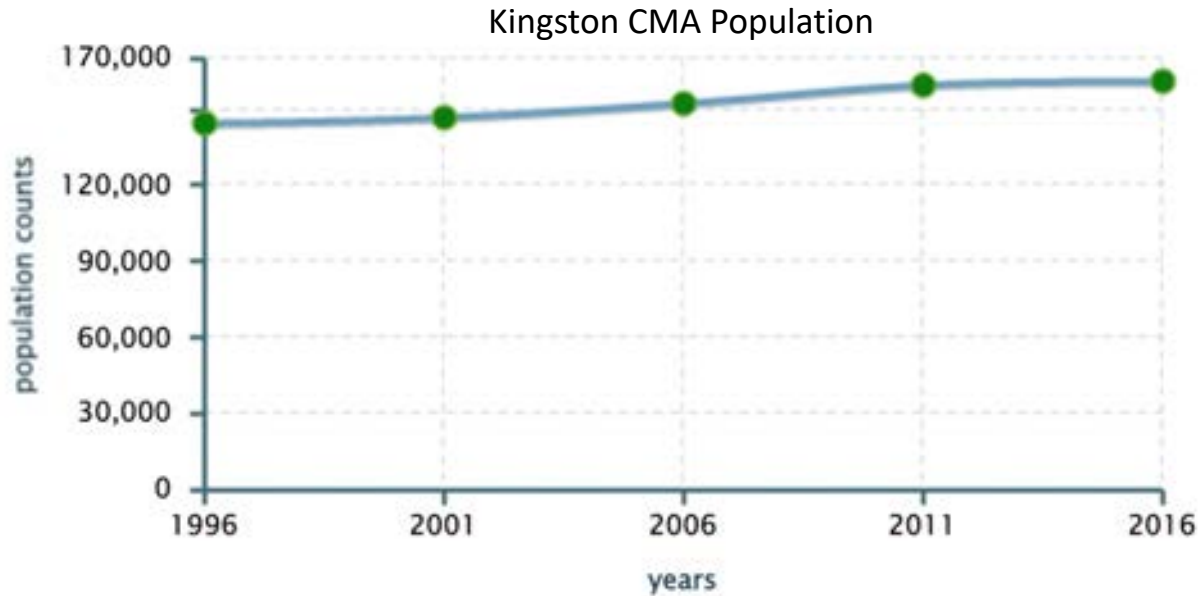
Description: Millennial and Millennially-aligned travellers looking for intellectual stimulation and fun

SOURCE MARKETS

VFR may represent an important area for future growth.

Population Growth

Based on 2016 Census data the City of Kingston’s population was 123,798, growing 0.4% from 2011 to 2016. When analyzing the 2016 Census data for the Census Metropolitan Area (CMA) of Kingston the population was 161,175 which represented growth of 1% during the same period of 2011 and 2016.



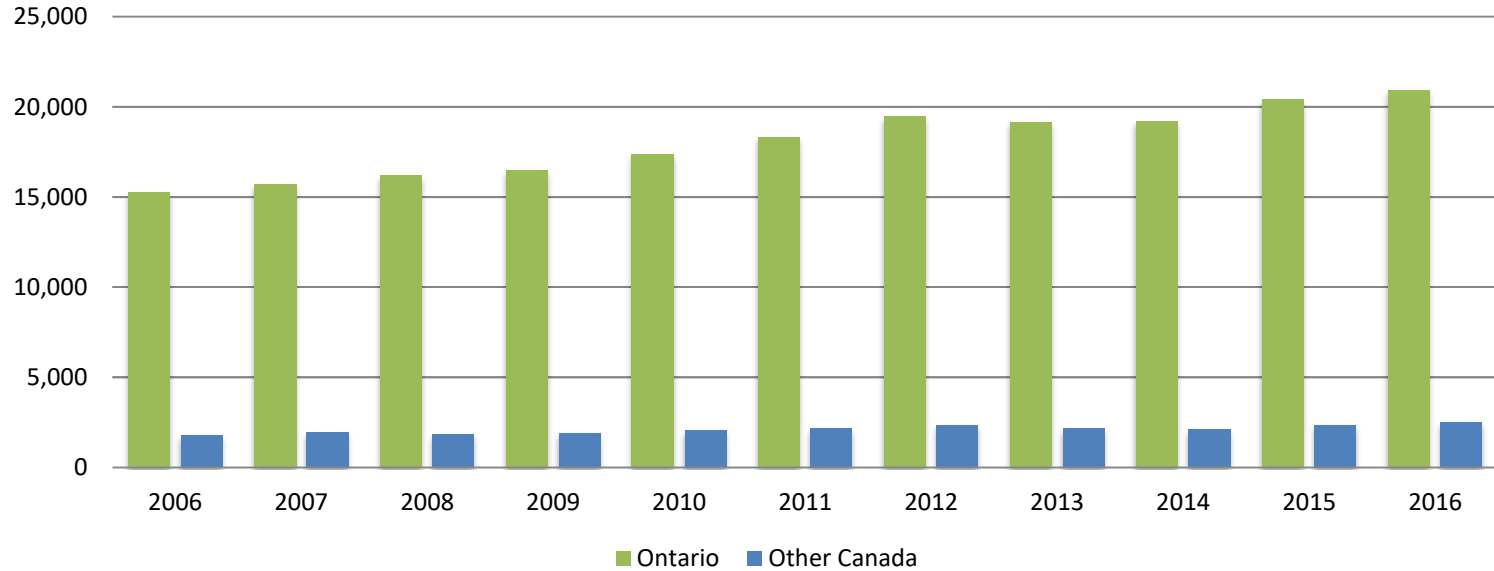
At present, approximately 46% of Region 9 tourists are visiting a resident each year. A long-term population projection is currently being updated for the City of Kingston and Kingston CMA to 2046. If positive growth rates are predicted there is potential to increase the VFR market proportionally.

SOURCE MARKETS, cont'd

Ontario

Based on Destination Ontario brand tracking research undertaken in 2017, Ontario holds a strong position among Ontario travellers for short getaways. Key takeaways from the research were that Ontario is: top of mind, meets their needs, rates highly, is considered more often and stimulates strong interest. Familiarity with Ontario was seen to be its weakness and research suggested this was the root cause of travellers considering Ontario to be less unique and/or a popular/trendy destination than other travel destinations.

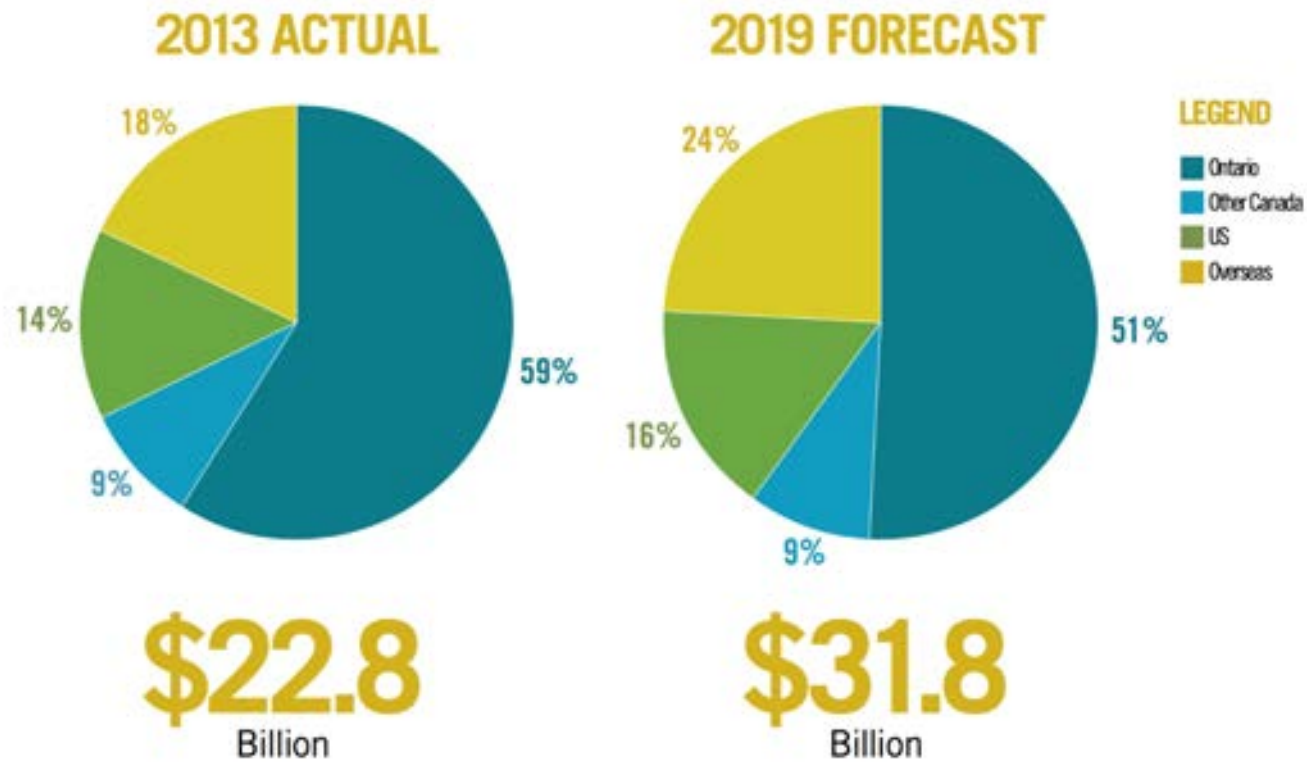
Ontario Tourism Receipts Ontario and Other Canada (Millions)



SOURCE MARKETS, cont'd

US

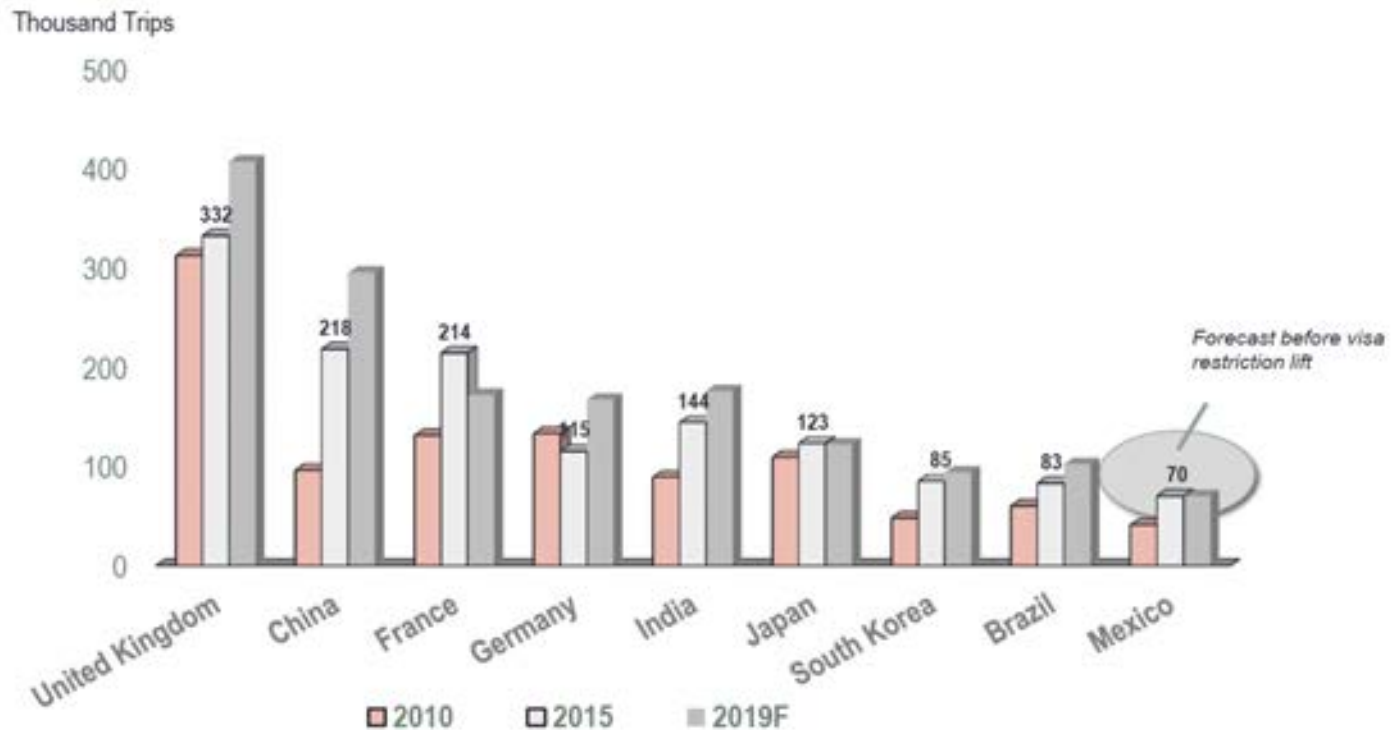
Destination Ontario predicted that US travellers would grow to 16% of visitor expenditure in Ontario by 2019. Canada recorded the highest US arrivals since 2005, despite a weaker US dollar in Canada at the start of 2018.



SOURCE MARKETS, cont'd

Overseas

Building synergies with the approach of Destination Ontario's overseas marketing and investment, the top three source markets for Kingston are the UK, China and France, with an emphasis on VFR for the China market.



Note: Forecast adjusted to 2015 actual base.
Source: Statistics Canada, Travel Survey of Residents of Canada, International Travel Survey, 2015
MTCS, Travel Outlook, 2016

SOURCE MARKETS, cont'd

Rank	Source Market	Geographic Location	Adult Population (2016; millions)	Ontario Inbound Visits (2016; millions)	Ontario Inbound Growth (2019)
High Priority	Ontario	Toronto Area	4.3	121.8	1.50%
		Ottawa Area	0.9		
		Kingston-Pembroke	0.3		
		Muskoka-Kawarthas	0.2		
Lower Priority	Canada	Montreal Area	1.3	7.1	1.20%
	US	Midwest States	52.7	12.4	3.30%
		Northeast States	44.7		
High Potential	Overseas	China	1,143	2.7	2.90%
		France	54.7		
		UK	54.1		

SOURCE MARKETS, cont'd

Rank	Source Market	Geography	Rationale	Seasonality
High Priority	Ontario	Toronto Area	While the population and forecasted growth is lower compared to other markets, Ontario travellers make up the majority of visits and spend within Ontario, and will continue to maintain an important position for future tourism growth.	The key factor for Ontario travellers is awareness; helping visitors to understand what's happening in Kingston, and when it is happening, will encourage the transition of tourism from peak season travel patterns to being a year-round destination for getaway trips.
		Ottawa Area		
		Kingston-Pembroke		
		Muskoka-Kawarthas		

SOURCE MARKETS, cont'd

Rank	Source Market	Geography	Rationale	Seasonality
Lower Priority	Canada	Montreal Area	The Quebec market's growth forecast is lower in comparison to other source markets, however an accelerating economy shows promise. According to the RTO9 commissioned Travel Intentions Study for Quebec, travellers are more likely to drive to their destination to manage their budget and increase flexibility. They are also looking to learn, reconnect with others and have fun. However, weather plays a major role in destination choice.	Due to geographic proximity, Quebec travellers are important. During the shoulder season poor weather will be a major barrier for Kingston- however, highlighting how Kingston can help satisfy their need to connect with others and have fun through live music, concerts, entertainment will be key. Also given a preference to drive, regional tourism opportunities should be highlighted to point the uniqueness of South Eastern Ontario.
		Northeast States	US near markets continue to be a lucrative source of visitors for Kingston. The US travel forecast for 2019 is highest amongst the source markets. When in Canada, US travellers want to try local foods, attend food festivals and events and enjoy natural attractions. These travellers are most likely to be 55+. Average trip spend \$663.	An increase in arrivals by transport other than car has been observed recently and this is an opportunity for the cruise market. Although visits are mostly like to take place during the peak season, Kingston's geographic proximity and strength in Culinary, Beverage and Food offerings increasing awareness and perceptions as an authentic and unique destination for festivals and events may provide an opportunity to motivate travel throughout the year.
	Midwest States			

SOURCE MARKETS, cont'd

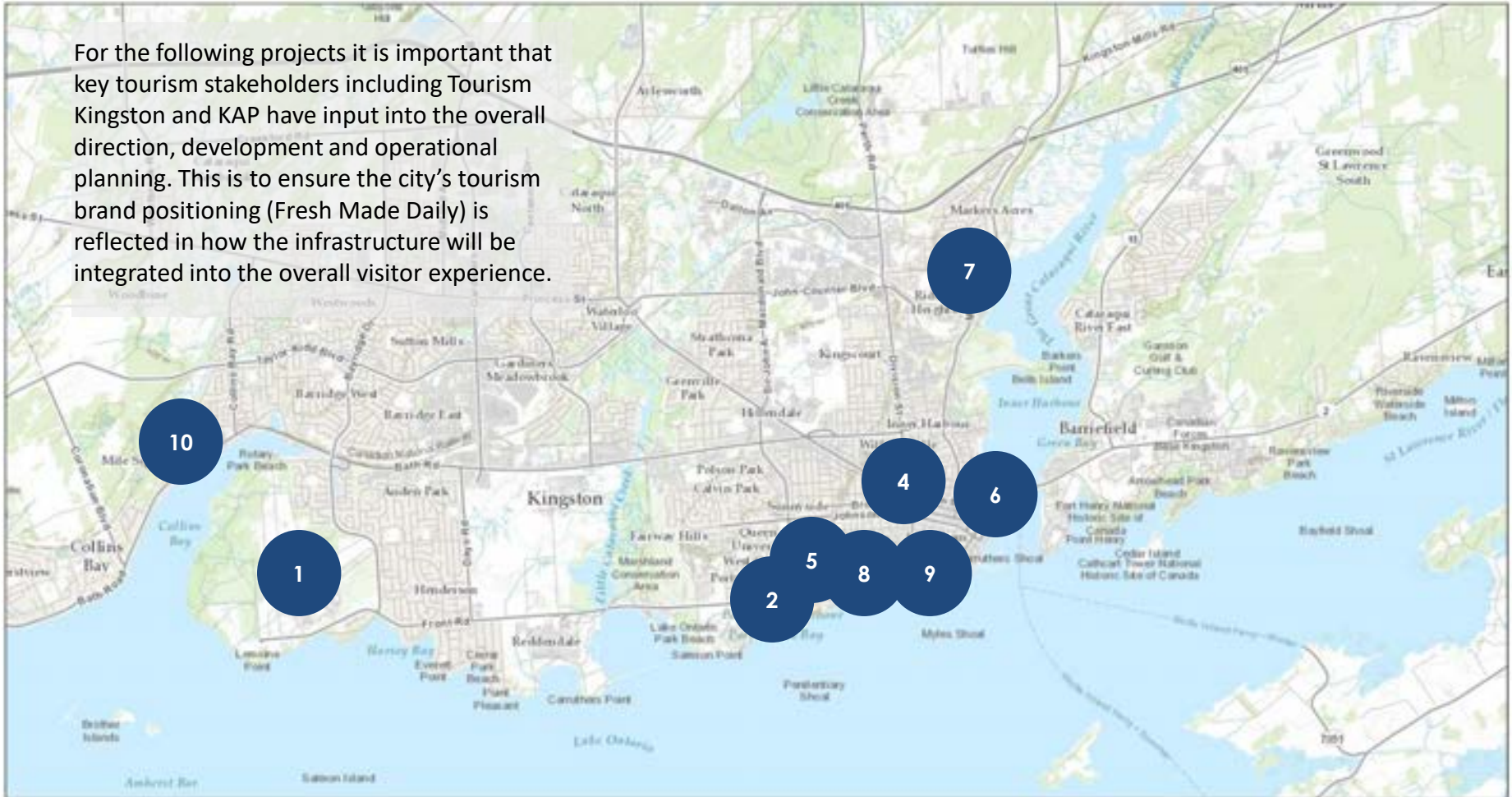
Rank	Source Market	Geography	Rationale	Seasonality
High Potential	Overseas	UK	Over the last 20+ years the UK has been Ontario's top overseas market for both visits and spending. Relatively high disposable income per capita and adults 55+ are driving the outbound market and visitation to Canada. Average trip spend \$1,262.	UK travellers are most likely to visit between May and September however cultural travellers are driven by experiences, especially ones that are status elevating (25-34) and expand one's worldview (55+). The key here will be increasing awareness and positive perceptions of Kingston.
		China	As incomes have risen in China so too has an interest in international travel. A 2016 Brand USA Market Intelligence Survey of Chinese Intercontinental travellers highlighted ecotourism and nature (61%), urban attractions/nightlife (57%), cultural historical attractions shopping (55%); all key assets within Kingston. Average trip spend \$2,387.	Travel peak periods are January-February, June-July and October which is an opportunity for Kingston to increase visitation is the shoulder season. Ensuring that Kingston's key assets meet the expectations of these travellers is critical to success (e.g. opening hours, nightlife).
		France	France has held a top position as a source market for Ontario inbound travel for the last 20+ years. According to Destination Canada research, French travellers want to de-stress, go to cities that are great for exploring and most of all be proud to tell people they visited. French travellers have a strong interest in cultural exploration and seek experiences they cannot find at home. Average trip spend \$1,428.	According to Destination Canada research, French travellers mostly visit in the peak travel months of July and August, but also express interest in visiting in the shoulder season months of September, October, May and June.

Section 4 – Kingston Tourism Infrastructure Projects

KEY INFRASTRUCTURE

There are many infrastructure projects across Kingston that are underway or recently completed. The projects with the highest impact and opportunity for the tourism economy are highlighted. The map indicates the current projects where available.

For the following projects it is important that key tourism stakeholders including Tourism Kingston and KAP have input into the overall direction, development and operational planning. This is to ensure the city's tourism brand positioning (Fresh Made Daily) is reflected in how the infrastructure will be integrated into the overall visitor experience.



KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS

Transportation



Norman Rogers Airport	
Description	The expansion of Kingston’s airport was a priority set by Council in the City of Kingston’s 2018-2020 Strategic Plan. The project involves modernizing existing infrastructure to allow for more than double the current passenger capacity.
Cost	\$18 million (includes the installation of the new Instrument Landing System (ILS))
Tourism	<p>The redeveloped airport will be an improved gateway to Kingston and South Eastern Ontario and a direct link for international transfers through Toronto Pearson Airport. The modernization also presents opportunities for integrating the Fresh Made Daily brand to improve first impressions and the visitor experience.</p> <p>The expanded terminal will allow for multiple flight arrival/departures (including multiple airline check-in space and expanded hold-room post-security). The extended runway and new ILS will allow for larger, more modern aircraft.</p>

KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS cont'd.

2

Built Heritage

Portsmouth Olympic Harbour (POH) property, the former Kingston Penitentiary (KP) property and harbour property	
Description	A community visioning exercise started in 2016 and was endorsed by City Council in 2017. The long term phased redevelopment of the site is expected to be a 10 to 15 year process.
Cost	N/A
Tourism	Tourism is one of the key elements for redevelopment. With the success of KP public tours, which in 2017 generated an estimated \$2.44M in net profit, there is potential for the area to become an entertainment and tourism district along the lines of Toronto's Distillery District and Vancouver's Granville Island.

KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS cont'd.

Educational Institutions



SLC Downtown Campus	
Description	Discussions are underway to create a SLC Campus in the downtown core, with a focus on Tourism, Hospitality and the Culinary Arts. The City of Kingston is currently working with SLC to develop a vision and long-term plan for this project.
Location	N/A
Tourism	<p>An inspiring state-of-the-art facility for a Tourism, Hospitality and the Culinary Arts Campus in the heart of downtown has the potential to position Kingston as the Centre of Excellence for tourism training in Canada, ensuring a highly trained and skilled workforce is able to meet the demands of a growing tourism economy. The campus would play a key role in addressing challenges facing the tourism economy in Kingston related to:</p> <ol style="list-style-type: none"> 1. Seasonality: Ensures a constant supply of staff available for year-round tourism 2. Staffing: A pool of qualified staff with a need for experiential learning opportunities 3. Products: Staff with deep knowledge of the destination's tourism offerings leads to a higher quality visitor experience 4. Competitive Advantage: Training focussed on the cultural preferences of visitors from overseas markets (e.g. China)

KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS cont'd.

Downtown Enhancement



Princess Street	
Description	This Princess Street revitalization began in 2010 as part of the Downtown Action Plan. The project will be completed in summer 2018.
Cost	\$66 million
Tourism	Princess Street is the heart of Kingston’s social and retail district and through a phased approach existing infrastructure has been modernized with a focus on retaining historic character, enhancing the streetscape and drawing pedestrians further along the street.

KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS cont'd.

Culture and Arts

Venues	
Description	Over the last 10 years significant investments have been made by the City of Kingston, its partners and investors to build and transform key cultural and arts venues into dynamic and inspiring facilities.
Locations/Cost	<p>The Grand Theatre (\$17.1 million)</p> <p>Leon's Centre (\$46.5 million)</p> <p>Isabel Bader Centre for the Performing Arts (\$48 million)</p> <p>Tett Centre for Creativity and Learning (\$13.2 million)</p> <p>SLC Innovation venue expansion</p>
Tourism	These facilities play a key role in the transformation process from what may be viewed as traditional tourism attractions into well-known cultural and arts experience offerings that attract visitors from across Ontario, US and Overseas year after year. From a tourism development perspective these facilities form part of the hub to foster community creativity and they also open dialogue for local engagement in tourism.

KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS cont'd.

6

Waterfront

Deep Water Dock	
Description	As part of the 2015-2018 Strategic Plan, City Council identified the feasibility of a deep-water dock facility for cruise-type ships as one of its priorities.
Costs	N/A
Tourism	Discussions for the potential development of a deep water dock at 1 Queen Street are continuing. It has been determined that Kingston's growth will be in small to mid-size size ships. There is potential for Kingston to develop as a cruise hub for South Eastern Ontario.

7

Third Crossing	
Description	A major bridge is being constructed over the Cataraqui River to support growth, vehicular traffic, transit and active transportation, creating a City-owned east-west link for the community.
Cost	\$180 million
Tourism	The bridge will link the east and west sides of Kingston, which adds more connectivity and thereby provides more opportunity for dispersion of visitors across the City. The inclusion of a multi-use pathway for pedestrians and cyclists adds a unique space to the City's public waterfront.

KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS cont'd.

8

Waterfront

Breakwater Park (Waterfront Plan)	
Description	With significant funding from the federal government and a generous donation from Swim Drink Fish Canada/ W. Garfield Weston Foundation, Breakwater Park renovations were completed in summer 2018.
Cost	\$6.6 million
Tourism	The renovations included a new promenade, pedestrian bridge and shade structure, pier upgrades, steps and seating, shoreline works including an upland beach, landscaping and tree planting, and accessibility improvements. Breakwater Park is now a revitalized, modern and sustainable space and this is an excellent example of a project that benefits the community and visitors looking to take in and experience the vibrancy of Kingston.

9

Richardson Beach (Waterfront Plan)	
Description	A favourite waterfront destination, the focus of this project is to improve the shoreline, landscape, beach access and heritage Richardson Bathhouse building. The project will be constructed within the next five years.
Cost	\$1.34 million
Tourism	Richardson Beach is an additional access point to the waterfront that serves as a space to infuse culture and arts for festivals, events, live music, movie screenings etc.

KEY INFRASTRUCTURE cont'd

MAJOR PROJECTS cont'd.

Waterfront

Bath Road Bikeway (Waterfront Plan)	
Description	This is the first separated bike lane in Kingston and a welcome expansion to the cycling network. The multi-use path will be fully accessible for walking, cycling and wheelchairs.
Cost	Not determined
Tourism	Bath Road Bikeway will enhance the Waterfront Trail and create more connectivity between tourism attractions and sites. According to research within Ontario's Cycling Tourism Plan, "cycling visitors generally spend more on average per trip than other visitors (\$255/trip for cycling tourists compared to \$171/trip for total visitors.) Cycling tourists to Ontario stay longer than regular visitors and the majority of Ontario visits by cyclists were overnight visits (83%). The average number of nights spent on cycling visits was 3.4, slightly above Ontario's total visitor average of 3.1 nights.". Continuing to improve Kingston's cycling route is important for active transportation and tourism growth.

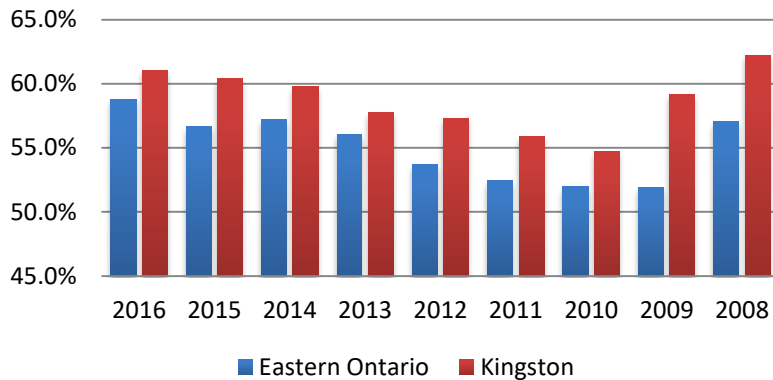
Source: Ontario Ministry of Tourism, Culture and Sport

KEY INFRASTRUCTURE - HOTELS

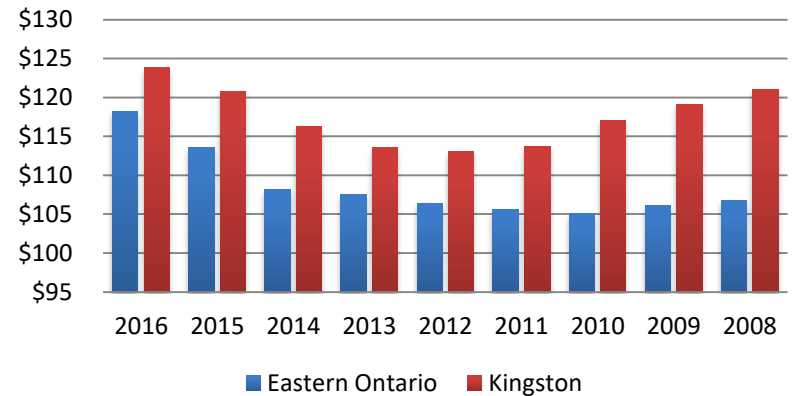
Based on data from the CBRE Hotels Trends in the Hotel Industry National Market Report for 2008-2016, Kingston consistently outperforms the region for room occupancy and has had consistently higher average daily rates.

The hotel supply consists of approximately 55 hotels, motels and bed and breakfasts with 2,500 rooms available in Kingston.

Hotel Occupancy



Average Daily Rate




City	Hotel Occupancy	Average Daily Rate
Kingston	61%	\$121
Toronto (Downtown)	84%	\$215
Ottawa	81%	\$169
Montreal	74%	\$168

KEY INFRASTRUCTURE - HOTELS, cont'd

There was a healthy increase in room supply in Kingston between 2009 and 2016; 508 rooms were added by branded hotel chains. While the increase in supply caused a one year decline in the occupancy rates (-4.5%) there was a quick recovery.

Note: There are currently 500 new hotel rooms coming into the Kingston market by 2020. This presents both an opportunity to grow capacity as well as a challenge to effectively balance supply with demand.

HOTEL NAME		NUMBER OF ROOMS
	Holiday Inn Express	88
	Motel 6	77
	Residence Inn Marriot	141
	Courtyard Marriott	128
	Quality Inn	74

Section 5 – Strategic Recommendations

COMPETITIVE ANALYSIS

Competitors that understand their own brand and competitive advantage have succeeded in attracting new visitors and building loyalty.

We looked at three small and mid-size cities and analyzed them against eight tourism competitiveness indicators (below). The cities chosen were Kelowna in British Columbia and Stratford and Niagara-on-the-Lake in Ontario. Similar to Kingston, each city either has shoreline as a defining characteristic, a strong cultural and arts sector and is near other large cities.



KEY TAKEAWAYS

Kelowna

Stunning natural assets. Kelowna’s has a strong focus on year-round offerings including many family products and experiences. Efforts have primarily been focussed on increasing inbound overnight travel through industry marketing partnership programs.

Stratford

The majority of tourism visits are generated through Stratford’s signature event the “Stratford Festival” which is eight months long and takes place annually. Brand positioning is heavily focussed on the arts with couples and groups of friends as the target market for getaways.

Niagara-on-the-Lake

Located in a high-performing tourism region, Niagara-on-the-Lake (NOTL) attracts 3 million visitors annually with 11 signature events including the well-known Shaw Festival. NOTL successfully delivers the getaway experience to couples and has focussed on group events, promoting a low-cost 12 minute flight from Toronto.

GROWTH POTENTIAL

A focussed strategy that builds on Kingston's strategic position and core strengths can lead to sustainable growth.

There are three key opportunities for Kingston to increase its market share of visitors, increase length of stay and visitor spending for sustainable growth.

1. Pursue overseas visitor growth:

There is potential to increase higher-yield overseas visitors by leveraging marketing programs and investments of Destination Ontario and regional partners to reach source markets in a cohesive and cost-effective way. The key source markets for Kingston should match those of Destination Ontario, with the top three being UK, China and France. Key trends and current tourism research should guide future decision-making with respect these source markets and additional ones.

2. Leverage compression:

The majority of visits to Kingston are same-day. To increase length of stay, take advantage of compression periods and resulting high prices in the Toronto, Ottawa and Montreal markets to shift into a getaway and short haul travel destination. The short haul travel market has increased globally over the past few decades. In Ontario, 60% of overnight Ontario pleasure trips were 1-3 days, searches for “staycation” continue to grow year-over-year and overnight pleasure trips in Ontario are mainly driven by couples (50%) and groups of 3-4 (35.5%). The most important consideration for getaways and short haul travel is convenient access to the destination.

Actionable Tips:

- Kingston's geographically appealing position, prices and easy transport options are important features that should be highlighted.
- Integrate the use of packages to extend stays. An example is two or three-night packages or options to start stays on alternate days to prompt visitors into visiting and staying longer.
- Be aware of major events, meetings, conventions and tradeshow in the Toronto, Ottawa and Montreal markets to understand demand and supply.

GROWTH POTENTIAL, cont'd

3. Infuse brand positioning and culture:

Continue to build on the award-winning “Fresh Made Daily” brand to infuse core truths about Kingston into marketing, products and programming. The cultural tourism market in Ontario and globally is strong. In 2014 there were 12.3 million cultural visits in Ontario, with spending of \$6.5 billion, accounting for 27% of total visitor spending. Kingston needs to lead with culture and arts to increase its competitive advantage in Ontario to become known as the go-to creative, vibrant and authentic destination that it is.

Actionable Tip:

- Use the brand to engage the community to identify and create new product.

Continuing to assess the following tourism opportunities is recommended for supplemental pathways to growth:

a) Cruising

As part of the 2015-2018 Strategic Plan, City Council identified the feasibility of a deep-water dock facility for cruise-type ships as one of its priorities. Based on the latest information from an Ontario Great Lakes cruise ship assessment, the recommended focus for Kingston’s growth will be on small to mid-size size ships. Kingston received over 20 cruise ships with 2,400+ total passengers in 2017 and the number of passengers is expected to double between 2017 to 2019. Globally, the economic impact of the cruise industry is strong and growing, in 2016 there were 24.7 million cruise passengers worldwide.

b) Sports

In 2014, there were 8.1 million visitors that participated in sports either as player or spectator, spending \$2.3 billion in the Ontario. In 2018, the Canadian Sports Tourism Alliance (CSTA) launched the Global Sports Impact (GSI) Canada Index which is a data based assessment tool that helps cities understand impacts of their sport event strategy. Montreal is ranked as the top city in Canada for hosting sports events followed by Edmonton, Quebec City, Ottawa and Vancouver—Kingston ranked 10th on the list. When ranking cities by population, for those with 150,000-500,000 people, Kingston ranked 2nd out of 13. From 2017 onwards Kingston hosted 26 National Championship (17) and International Events (9). While there is potential for sports tourism, growth should be based on existing and planned facilities and venues.

GROWTH POTENTIAL, cont'd

c) Tourism Growth Areas

Leverage City assets and tools to support the development of tourism initiatives in specific areas. This could include community benefits or incentives to support tourism service delivery.

Tourism Growth Areas would:

- Prioritize tourism as a vital sector in Kingston's economy
- Leverage underserved properties and surplus lands through leases and/or sales to grow the economy
- Create a strong value proposition to promote the City for investment
- Increase the number of visitors, length of stay and spending

Immediate Actions:

- Identify investment ready tourism assets/site locations

KINGSTON'S TOURISM DEVELOPMENT AND MANAGEMENT GOALS

Vision

To be a world-class tourism destination leveraging the city's cultural, culinary and arts vibe within the historical and natural assets

Short to Medium term Priorities

<p>1</p> <p>Infrastructure, transportation and access</p> <ul style="list-style-type: none"> New infrastructure utilization and development including: waterfront; Kingston Pen; SLC downtown campus; deep water port; airport; conference centre <p>These would be a combination of partnership and joint venture projects with key stakeholders including other levels of government and private sector developers and investors.</p> <p>These priorities would include possible exploration of the infrastructure (e.g., feasibility study, right through to actual development).</p>	<p>2</p> <p>Visitor experience, product and experience development, sense of place</p> <ul style="list-style-type: none"> Increased Canadian, US and overseas recognition as a vibrant tourism offering Offering year-round destination products and experiences including tour packages An enhanced arts/culture offering and full integration within the tourism experience Improved customer service and visitor experience Full adoption and implementation of the Kingston Fresh Made Daily brand positioning 	<p>3</p> <p>Industry Development</p> <ul style="list-style-type: none"> Increased visitation in shoulder and winter seasons An enhanced sports tourism offering and increased revenue Empower Tourism Kingston to lead the implementation and tracking of the IDS to realize Kingston's tourism vision 	<p>4</p> <p>Policy and Regulation</p> <ul style="list-style-type: none"> Better community integration within tourism service delivery
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Goal

Effective Development and Management of Kingston as a Tourism Destination.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

1) Infrastructure, Transportation and Access: 6 Main Recommendations

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Better integrate the waterfront into the downtown tourism experience <p>Possible examples:</p> <ul style="list-style-type: none"> - Remove physical barriers to crossing Ontario and King Streets for pedestrians - Encourage operators to offer watersport rentals - Promote food and beverage options (e.g., food trucks) 	<ul style="list-style-type: none"> ▪ The waterfront is a differentiating asset for the city and a natural draw for visitors, however, partially inaccessible due to physical barriers and limited actual tourist-friendly products and services on offer.
<ul style="list-style-type: none"> ▪ Utilize the Kingston Pen as core tourism zone with the inclusion of restaurants, retail and special events <p>Possible examples:</p> <ul style="list-style-type: none"> - The Pen could become an entertainment and tourism zone along the lines of Toronto’s Distillery District and Vancouver’s Granville Island - Create a bespoke festival around the Pen venue 	<ul style="list-style-type: none"> ▪ The Pen is a unique and historical asset that has more tourism potential through various activities that could complement public tours as well as become an important site for film productions. ▪ The City and other partners including Tourism Kingston and St. Lawrence Parks Commission should work with the Federal Government to explore a partnership structure that would enable longer term access and use of the site for tourism purposes.
<ul style="list-style-type: none"> ▪ Conduct a feasibility study: 1) The use of the Leon’s Centre for events including business meetings and conferences; 2) A new potential venue <p>Possible examples:</p> <ul style="list-style-type: none"> - A demand and opportunity study including scenario planning and projection analysis 	<ul style="list-style-type: none"> ▪ There are mixed signals within the tourism industry on the need for a business meeting and conference centre and the viability of the Leon’s Centre to fulfil this mandate.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

1) Infrastructure, Transportation and Access: 6 Main Recommendations, cont’d

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Continue the work already in progress to attract a new market entrant and/or increase frequency at the airport <p>Possible examples:</p> <ul style="list-style-type: none"> - The City should send a fact finding mission to the annual Routes Americas conference to learn how other jurisdictions have successfully courted airlines - The City could then modify their current market attraction plan (i.e., business case) and a short list of possible new entrants 	<ul style="list-style-type: none"> ▪ Kingston suffers from limited air connectivity, yet there remains a likely business case for Air Canada to increase frequency and/or a new market entrant to fly to the airport. ▪ There is precedence for underutilized airports to court charters as well as low cost carriers with a solid pitch case and incentives.
<ul style="list-style-type: none"> ▪ Outline the business case for a downtown campus with a tourism, culinary and hospitality program including integration with Kingston tourism businesses <p>Possible examples:</p> <ul style="list-style-type: none"> - Beyond a physical campus, Kingston could position St. Lawrence College as a leading player in the culinary tourism industry: developing a city-wide co-operative program with local business; hosting a culinary tourism industry conference, etc. 	<ul style="list-style-type: none"> ▪ Kingston has the potential to become a regional centre of excellence in hospitality and culinary tourism by training professionals, who in turn could work within the city’s industry, possibly alleviating some of the seasonality issues with employment.
<ul style="list-style-type: none"> ▪ Position Kingston as a key cruise tourism hub <p>Possible examples:</p> <ul style="list-style-type: none"> - Kingston could become a Great Lakes cruise destination 	<ul style="list-style-type: none"> ▪ The current nascent development around the deep water port will provide the needed infrastructure for Kingston to target Great Lakes cruise companies.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

2) Visitor Experience, Product Development, Sense of Place: 6 Main Recommendations

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Develop a full city product development road map to increase the number of market ready operators, specifically: tour operators around the waterfront (boating and cycling); museums, art galleries, historic sites, festivals and cultural events <p>Possible examples:</p> <ul style="list-style-type: none"> - At minimum Kingston needs an asset inventory with a classification by market and trade readiness and aligned to the demand appeals of target consumers - This can then be geo-mapped to better understand tourism routes, itineraries and possible packages - Strengthen relationships with the arts, museums and heritage sectors that include assets that can be better resourced and profiled to attract visitors 	<ul style="list-style-type: none"> ▪ There is a consistent belief that Tourism Kingston needs to take a leadership position around the identification and development of new products and experiences in partnership with the City. This likely involves the appointment of a Product Development manager (within the existing staffing structure) and the development of a product development road map utilizing a gap analysis and product to consumer asset mapping. ▪ The city’s vibrant cultural products and experiences likely need special attention within a proposed product development road map to both boost the number of market ready offerings and ensure these assets are integrated into the overall tourism experience.
<ul style="list-style-type: none"> ▪ Develop and promote a number of signature experience itineraries and associated packages geared at FIT and Group travellers, segmented by markets, demographics and seasons (especially including Winter) <p>Possible examples:</p> <ul style="list-style-type: none"> • Signature experiences help define and position a destination. Kingston only needs to develop two to three packages by market and season and then promote these to consumers • In tandem these can then be communicated to the industry to encourage organic growth and replication 	<ul style="list-style-type: none"> ▪ The number one barrier for travellers to book and visit a destination is a lack of understanding of what there is to see and do. While there exist excellent packages including the City-Pass, Tourism Kingston likely needs to develop a suite of Signature itineraries and packages (i.e., with price points and retail channel options), aligned to market segments and seasons. ▪ Again, the city’s myriad museums and cultural attractions should be integrated into a set of core itineraries.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

2) Visitor Experience, Product Development, Sense of Place: 6 Main Recommendations, cont’d

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Improve Kingston’s appeal as both a family friendly and couples getaway destination <p>Possible examples:</p> <ul style="list-style-type: none"> - Marketing campaigns and associated communications should likely be better segmented to ensure clear and consistent messages that will better resonate with consumers - Many DMOs position their destinations for families during high season and school holidays and shift communications to couples during low and shoulder seasons 	<ul style="list-style-type: none"> ▪ There is evidence that Kingston’s appeals differ by demographic audience. Tourism Kingston and KAP likely need to define distinct offerings and messaging to target families as well as couples on getaways. ▪ Additionally the segment ‘Up and Coming Explorers’ indicates more than half of the travellers in this group are a visible minority and/or immigrants to Canada. Tourism Kingston should further develop content that would be attractive to a broader cross-section of potential travellers.
<ul style="list-style-type: none"> ▪ Launch the Ambassador program to focus on improving the visitor experience <p>Possible examples</p> <ul style="list-style-type: none"> - Kingston Ambassadors could help draw more visitors to experience the waterfront and areas of the city beyond core tourism routes, as well as highlight retail, culinary and beverage options - With consumers consistently citing the need for more personalization, Ambassadors could provide that missing link in the visitor experience 	<ul style="list-style-type: none"> ▪ The tactical visitor experience could likely improve with more personal engagement and effective training of frontline tourism staff. Tourism Kingston’s existing Ambassador program should be launched and evaluated.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

2) Visitor Experience, Product Development, Sense of Place: 6 Main Recommendations, cont’d

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Improve the outreach and targeting of diversified tour operators via an effective travel trade plan <p>Possible examples:</p> <ul style="list-style-type: none"> - A travel trade engagement plan has the potential to greatly improve Kingston’s visitation from higher-value and international travellers, as well as better diversify visitation in shoulder seasons - With a travel trade plan in place, Kingston would then have an ability to likely leverage Destination Ontario marketing and communications campaigns and grow business via major travel trade events (e.g., RVC and WTM) 	<ul style="list-style-type: none"> ▪ Tourism Kingston with KAP needs to develop a travel trade plan seeking out alternative operators targeting higher-value travellers aligned to the city’s cultural, culinary and lifestyle positioning. Tourism Ottawa’s new travel trade plan could be used as a model.
<ul style="list-style-type: none"> ▪ Effectively define Kingston’s tourism brand positioning and fully launch the One Voice vision <p>Possible examples:</p> <ul style="list-style-type: none"> - Cities with one central brand positioning present a clearer offering for travel and business consumers and can better drive business down the Path to Purchase - As the DMO, Tourism Kingston should be empowered to lead the brand articulation and rollout to city stakeholders and tourism businesses 	<ul style="list-style-type: none"> ▪ The Kingston Fresh Made Daily brand needs to be fully communicated and rolled out by Tourism Kingston, KAP and the City (within the context of the planned City branding exercise).

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

3) Industry Development: 5 Main Recommendations

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Support operators, retail, culinary and accommodation suppliers in shoulder seasons with promotional packages and themed events <p>Possible examples:</p> <ul style="list-style-type: none"> - Toronto’s ‘Winterlicious’ campaign, while targeted at locals, is an example of what could be planned and launched - A seasonal events calendar should be developed to help develop the city’s sense of place and the visitor experience in shoulder seasons 	<ul style="list-style-type: none"> ▪ The city needs to transition to a four-season destination and diversify visitation more effectively from the summer high-season. Tourism Kingston in partnership with KAP and the City likely needs to develop a series of shoulder season itineraries and packages and possibly identify and promote one or more events.
<ul style="list-style-type: none"> ▪ Effectively build out Kingston’s potential as a small/medium sized business event destination; set up a business events advisory group <p>Possible examples:</p> <ul style="list-style-type: none"> - Destination Canada’s Business Events strategy and plan is a clear example of what Kingston could do as well as leverage - Integrating business events within the overall leisure tourism marketing strategy will also make Kingston stand apart from competitors 	<ul style="list-style-type: none"> ▪ While a coordinator does exist to support the development of business events for the city, Tourism Kingston should develop and follow a forward plan to target specific industry sectors, corporations and associations and align business events outreach efforts accordingly. KAP has a central role to play in the support of this plan.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

3) Industry Development: 5 Main Recommendations, cont’d

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Leverage Queens’ expertise in hosting sporting events via a sports tourism promotional and management plan; set up a sports tourism advisory group <p>Possible examples:</p> <ul style="list-style-type: none"> - The Canadian Sports Tourism Alliance provides a number of resources the city could leverage to better develop its sports tourism opportunity and business - Hamilton, Ontario is also considered a leading example of how a sports tourism market can be effectively developed and should be looked at 	<ul style="list-style-type: none"> ▪ Queen’s University benefits from key sports tourism assets as well as a team with extensive experience in professionally targeting and managing sporting events. As a first step Tourism Kingston should set up a sports tourism advisory group with a mandate to develop a targeting and management plan for the city. This level of coordination and structure will likely help develop the city’s nascent sports tourism potential.
<ul style="list-style-type: none"> ▪ Offer a series of training workshops for retail, culinary and tour operators to become more tourism aware and responsive – possibly via a partnership with St. Lawrence College (i.e., Service Excellence training) <p>Possible examples:</p> <ul style="list-style-type: none"> - Destination BC, Travel Alberta and the Atlantic Canada Tourism Partnership have market and trade ready programs in place to support and advance the potential of tourism operators to grow their tourism business – these public programs could readily be adapted for Kingston, especially via ½ day training workshops 	<ul style="list-style-type: none"> ▪ There is a common belief that the city’s retail, culinary and tour operators could benefit from some level of education and training on how to more effectively speak with travellers and deliver on tourism services. Tourism Kingston should invite a third-party tourism training company (possibly St. Lawrence College) to support the development and facilitation of a series of annual training workshops for businesses. The Downtown Business Improvement Area (BIA) could be a potential partner.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

3) Industry Development: 5 Main Recommendations, cont’d

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Provide the museums and heritage sectors with support to improve market readiness that includes increased professional development opportunities. ▪ Possible examples: <ul style="list-style-type: none"> - Workshops using Ontario’s market readiness criteria could be utilized to support management teams in promoting their assets to potential travel consumers - Tourism Kingston could also help develop a specific museum and heritage intinerary 	<ul style="list-style-type: none"> ▪ Kingston’s Fresh Made Daily brand positioning directly benefits from the city’s unique and vibrant museum and heritage sector. These assets likely need to be further supported to ‘take them to market’ and promote them to potential visitors.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

4) Policy and Regulatory: 3 Main Recommendations

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Develop a community engagement communications plan: what is happening with tourism in the city (stimulate demand) and how you can support Kingston’s tourism economy (develop supply) <p>Possible examples</p> <ul style="list-style-type: none"> - When a city’s entertainment industry thrives there are clear benefits for the broader tourism industry - Kingston could benefit from more information shared with residents via digital and social channels to encourage civic engagement and participation in tourism 	<ul style="list-style-type: none"> ▪ Best-practice in destination management involves engaging with local citizens to ensure they are able to participate in and benefit from the tourism industry. Tourism Kingston, with support of the City, has a role to play in developing a series of messages around not just soliciting feedback from citizens related to opinions of the tourism industry, but also informing them of the benefits of tourism and the role they have to play in delivering the tourism experience.
<ul style="list-style-type: none"> ▪ iVia private/public partnership(s) provide additional WiFi infrastructure in the downtown core which will provide support for tourism and the visitor experience <p>Possible examples</p> <ul style="list-style-type: none"> - Via a corporate partnership program, the City could pilot a WiFi zone which will in turn support tourism delivery and the visitor experience 	<ul style="list-style-type: none"> ▪ WiFi is crucial in supporting the traveller Kingston experience. Kingston should explore options to offer WiFi in the downtown core that leverages existing fibre-optic infrastructure and relationships with local and national Internet service providers. ▪ Note: There is a business model in other jurisdictions for free WiFi, but this requires the sale of user data, which is something the City may not want to entertain. A possible solution could be if the proposed free WiFi were owned and delivered by a third party.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

4) Policy and Regulatory: 3 Main Recommendations, cont’d

Recommendation	Rationale
<ul style="list-style-type: none"> ▪ Improve the pedestrian-friendly infrastructure in the city (alleys and spaces) <p>Possible examples:</p> <ul style="list-style-type: none"> - Many European cities encourage pedestrian exploration of the immediate core which in turn fosters a sense of place for events, festivals and culinary tourism - Beyond improved physical signage and wayfinding, the City could pilot a pedestrian zone in partnership with a festival or event 	<ul style="list-style-type: none"> ▪ The city’s many alleys and public spaces could be better utilized for festivals, events and ‘pop-up’ experiences. The City should develop a series of pedestrian-friendly walking zones and encourage retail, culinary and tourism operators to provide services in these areas geared at tourists.

KINGSTON'S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

Implementation Road Map (see next page for notes on specific initiatives)

Quick Wins: 1 to 12 months	Medium Term: 2 to 3 years	Long Term 3 to 5+ years
<p>1) Infrastructure, Transportation and Access</p>	<ul style="list-style-type: none"> Outline the business case for a downtown post-secondary campus with a tourism and hospitality program including integration with Kingston tourism businesses. Work with SLC to scope the potential for tourism, culinary and hospitality opportunities and curriculum. Conduct a feasibility study: 1) The use of the Leon's Centre for events including business meetings and conferences; 2) A new potential venue Better integrate the waterfront into the downtown tourism experience (see next page) 	<ul style="list-style-type: none"> Develop the Kingston Pen into a core tourism zone with the inclusion of restaurants, retail and special events Position Kingston as a key cruise tourism hub Develop a plan to target one or more new market entrants and/or increase frequency at the airport
<p>2) Visitor Experience, Product Development, Sense of Place</p>	<ul style="list-style-type: none"> Effectively define Kingston's tourism brand positioning and fully launch the One Voice vision Develop a product development road map to increase the number of market ready operators, specifically: tour operators around the waterfront (boating and cycling); museums, festivals and cultural events 	<ul style="list-style-type: none"> Develop and promote a number of signature experience itineraries and associated packages geared at FIT and Group travellers, segmented by markets, demographics and seasons Improve the outreach and targeting of diversified tour operators via an effective travel trade plan Launch the Ambassador program to focus on improving the visitor experience
<p>3) Industry Development</p>	<ul style="list-style-type: none"> Leverage Queens' expertise in hosting sporting events via a sports tourism promotional and management plan; set up a sports tourism advisory group Set up a business events advisory group 	<ul style="list-style-type: none"> Support operators, retail, culinary and accommodation suppliers in shoulder seasons with promotional packages and themed events Offer a series of training workshops for retail, culinary and tour operators to become more tourism aware and responsive Provide the museums and heritage sectors with support to improve market readiness that includes increased professional development opportunities.
<p>4) Policy and Regulatory</p>	<ul style="list-style-type: none"> Develop a community engagement communications plan: what is happening with tourism in the city (stimulate demand) and how you can support Kingston's tourism economy (develop supply) Improve the pedestrian-friendly infrastructure in the city (alleys and spaces) 	<ul style="list-style-type: none"> Via a 3rd party partnership provide WiFi infrastructure in the downtown core

KINGSTON'S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

Implementation Road Map, cont'd

Notes:

1. Better integrate the waterfront into the downtown tourism experience: This recommendation will apply to short term, medium term and long term. For example, the temporary closure of Ontario Street in front of the City during July/August could be contemplated in 2019. Improvements to the waterfront at Portsmouth Olympic Harbour next to the Kingston Pen would be medium term, etc. There are a number of projects that would be applicable over many years.
2. Improve the pedestrian-friendly infrastructure in the city (alleys and spaces): There are a number of projects, public and private, that will take place in the short term, medium term and long term.

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

1) Infrastructure, Transportation and Access: Lead Responsibility

Recommendation	Lead	Support
<ul style="list-style-type: none"> Better integrate the waterfront into the downtown tourism experience 	<ul style="list-style-type: none"> City 	<ul style="list-style-type: none"> Tourism Kingston
<ul style="list-style-type: none"> Develop the Kingston Pen into a core tourism zone with the inclusion of restaurants, retail and special events 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> Tourism Kingston City
<ul style="list-style-type: none"> Conduct a feasibility study: 1) The use of the Leon's Centre for events including business meetings and conferences; 2) A new potential venue 	<ul style="list-style-type: none"> City 	<ul style="list-style-type: none"> Tourism Kingston KAP
<ul style="list-style-type: none"> Develop a plan to target one or more new market entrants and/or increase frequency at the airport 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> City KAP
<ul style="list-style-type: none"> Outline the business case for a downtown campus with a tourism and hospitality program including integration with Kingston tourism businesses 	<ul style="list-style-type: none"> City 	<ul style="list-style-type: none"> Tourism Kingston KAP
<ul style="list-style-type: none"> Position Kingston as a key cruise tourism hub 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> City

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

2) Visitor Experience, Product Development, Sense of Place: Lead Responsibility

Recommendation	Lead	Support
<ul style="list-style-type: none"> Develop a product development road map to increase the number of market ready operators, specifically: tour operators around the waterfront (boating and cycling); museums, festivals and cultural events 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP
<ul style="list-style-type: none"> Develop and promote a number of signature experience itineraries and associated packages geared at FIT and Group travellers, segmented by markets, demographics and seasons 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP
<ul style="list-style-type: none"> Improve Kingston’s appeal as both a family friendly and couples getaway destination 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP
<ul style="list-style-type: none"> Launch the Ambassador program to focus on improving the visitor experience 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP City
<ul style="list-style-type: none"> Improve the outreach and targeting of diversified tour operators via an effective travel trade plan 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP
<ul style="list-style-type: none"> Effectively define Kingston’s brand positioning and fully launch the One Voice vision 	<ul style="list-style-type: none"> Tourism Kingston KAP 	<ul style="list-style-type: none"> City

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

3) Industry Development: Lead Responsibility

Recommendation	Lead	Support
<ul style="list-style-type: none"> Support operators, retail, culinary and accommodation suppliers in shoulder seasons with promotional packages and themed events 	<ul style="list-style-type: none"> Tourism Kingston KAP 	
<ul style="list-style-type: none"> Provide the museums and heritage sectors with support to improve market readiness that includes increased professional development opportunities. 	<ul style="list-style-type: none"> Tourism Kingston City 	Kingston Association of Museums
<ul style="list-style-type: none"> Effectively build out Kingston’s potential as a small/medium sized business event destination; set up a business events advisory group 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP
<ul style="list-style-type: none"> Leverage Queens’ expertise in hosting sporting events via a sports tourism promotional and management plan; set up a sports tourism advisory group 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP City
<ul style="list-style-type: none"> Offer a series of training workshops for retail, culinary and tour operators to become more tourism aware and responsive 	<ul style="list-style-type: none"> Tourism Kingston 	<ul style="list-style-type: none"> KAP City

KINGSTON’S TOURISM DEVELOPMENT AND MANAGEMENT PILLARS

4) Policy and Regulatory: Lead Responsibility

Recommendation	Lead	Support
<ul style="list-style-type: none"> ▪ Develop a community engagement communications plan: what is happening with tourism in the City (stimulate demand) and how you can support Kingston’s tourism economy (develop supply) 	<ul style="list-style-type: none"> ▪ Tourism Kingston 	<ul style="list-style-type: none"> • City
<ul style="list-style-type: none"> ▪ Via a 3rd party partnership provide WiFi infrastructure in the downtown core 	<ul style="list-style-type: none"> ▪ TBD 	<ul style="list-style-type: none"> • City
<ul style="list-style-type: none"> ▪ Improve the pedestrian-friendly infrastructure in the city (alleys and spaces) - zoning 	<ul style="list-style-type: none"> ▪ City 	<ul style="list-style-type: none"> ▪ Tourism Kingston

NEXT STEPS – IMPLEMENTATION OF THE IDS

While the IDS was developed under the direction of a steering committee, the mandate did not necessarily extend to the future implementation. Below are some recommendations on how the IDS should evolve.

- **Management of the IDS:** The overall management of the IDS should reside with Tourism Kingston under the authority of the Executive Director. As a first step the 20 main Strategic Recommendations should be individually mapped with a Work Stream Charter (i.e., a one page work plan description) developed, including:
 - An outline of the objective(s) the recommendation should address and why
 - An outline of the key activities and steps to develop and implement the recommendation
 - A list of budget and human resources needed
 - A list of possible risks/challenges to implement the recommendation
 - A clear performance measure including outputs and outcomes
- **Performance Measurement of the IDS:** The above mentioned output and outcome measures should be worked up into a scorecard framework by Tourism Kingston and form the basis of the impact and performance measurement system for the IDS. This information should be documented and communicated to the steering committee, Tourism Kingston Board of Directors and made publicly available to residents.
- **Accountability of the IDS:** The steering committee should be engaged on a go forward basis to hold Tourism Kingston and the key stakeholders, including the City and KAP accountable for the implementation of the IDS. The steering committee could meet quarterly and serve both as a sounding board and champion to ensure the plan is successful.
- **Modification/Amendment of the IDS:** The IDS should be evaluated on an annual basis to ensure relevance and applicability to Kingston's changing social, economic and political climate.

Section 6 – Appendices

APPENDIX 1 - KEY STAKEHOLDERS

In addition to the online survey, the following stakeholders were consulted during the IDS engagement process via one-on-one interviews:

Influencer Interviews	
NAME	ORGANIZATION
John Wright	Kingston Thousand Island Cruises
Ken Wong	Queen's University - Smith School of Business
Mary Farrar	Friends of the Inner Harbour
Don Curtis	Local Citizen
Michael Springer	Springer Group of Companies
Ronald Holgerson	St. Lawrence Parks Commission
Sophie Kiwala	Provincial Government
Rob Wood	8020 Inc.
Melanie Roberts	Destination Ontario
Trisha Grant	Destination Ontario
Doug Ritchie	Downtown Kingston BIA
Donna Gillespie	Kingston EDO
David Dossett	Martello Alley
Liz Schell	City of Kingston
Laura Turner	City of Kingston
Liam Karry	The Kick & Push Festival
A.J. Keilty	Varsity Properties Inc.
Bryan Paterson	City of Kingston
Jeff Downie	Queens University - Athletics
Martin Sherris	Kingston Chamber of Commerce
Mark Gerretsen	Federal Government
Danika Lohead	Kingston Arts Council

Steering Committee
NAME
Rob Kawamoto (Chair), Executive Director, Tourism Kingston
Brett Christopher, Managing Artistic Director, Thousand Islands Playhouse
Hugh Mackenzie, General Manager, Kingston 1000 Islands Cruises
Gerard Hunt, Chief Administrative Officer, City of Kingston
Lanie Hurdle, Commissioner, Community Services and Deputy Chief Administrative Officer, City of Kingston
Megan Knott, Executive Director, Kingston Accommodation Partners
Murray Matheson, Past Chair, Regional Tourism Organization 9
Tim Pater, Owner, Blackdog Hospitality Group
Colin Wiginton, Cultural Director, City of Kingston

APPENDIX 2 - PRODUCTS ALIGNED WITH THE USP

Culture and Arts	Rich History	Water
Fort Henry interactive events	Kingston Penitentiary	1000 Islands Cruises
Arts and Culture Festivals	Fort Henry	Kayak, canoe, SUP rentals
The Grand Theatre	Springer Market Square	Houseboat rentals
Isabel Bader Theatre for Performing Arts	Bellevue House	Waterfront Trail
Leon’s Centre	Visitor Information Centre	Marinas
Kingston Public Market	Architectural Tours	Sailing, windsurfing, kiteboarding
Craft Fairs and Markets	Queen’s University	Breakwater Park
Galleries	City Hall	
Museums	Streetscapes	
Intimate and eclectic theatres	Heritage Conservation District	
Kingston Trolley Tours	Rideau Canal	
Boutique shopping		
Local and artisanal restaurants/bars		
Drink and Food Tours		

APPENDIX 3 - COMPETITIVE ANALYSIS – KELOWNA

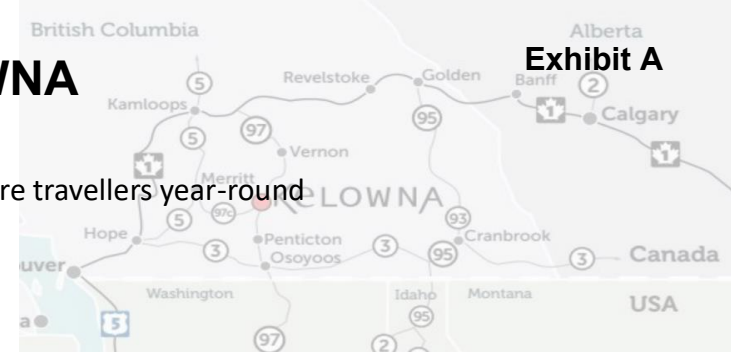


Exhibit A

Overview: On the shores of Okanagan Lake in British Columbia, Kelowna attracts leisure travellers year-round

Location: Between Vancouver (400km), Calgary (600 km) and the US border (Seattle)

Population: 128,000 (2016)

Performance: 1.9 million visitors annually and \$337 million in visitor spending

Brand Positioning/Products	Target Market	Marketing	Access and Transport
<p>“Culture and comforts of a major city, the welcome of a small town”. Showcasing wineries, golf, lake-activities, farms, farms, markets and orchards, beaches and parks, winter season activities. Arts, culture, shopping and dining for off-hours entertainment</p>	<p>Families, couples, groups of friends</p>	<p>General consumer website, print and digital guides, golf website, cost-shared trade shows and sales events, brochure racking program, Visitor Centre digital displays, social media</p>	<p>Access from five highways, Kelowna International Airport (15 km from city centre - 1.7m passengers annually), Shell Aero Centre (private aircraft) and Greyhound Bus service</p>
Structure	Investments	Skills and Labour	Accommodation
<p>Tourism Kelowna provides destination marketing for Kelowna and the Central Okanagan region. Their focus is generating inbound overnight travel. Developed a 2017-2021 Strategic Plan, undertaking long-term destination planning (2019)</p>	<p>Opened a new Visitor Centre in June 2018, expecting 100,000 visitors</p>	<p>9% of jobs in Kelowna are related to tourism (5,600 FTEs), with the majority working in the accommodations business</p>	<p>Over 4,400 rooms in more than 90 hotels, motels and bed and breakfasts and many vacation rentals. Collected a \$2 million hotel tax in 2016</p>

APPENDIX 3 - COMPETITIVE ANALYSIS – NIAGARA-ON-THE-LAKE



Overview: On the south shores of Lake Ontario, Niagara-on-the-Lake is a well-preserved 19th century village in Ontario
Location: Near Toronto (133 km), Buffalo NY (56 km), Lewiston (24 km), Detroit (386 km)
Population: 17,500
Performance: 3 million visitors with visitor spending of \$60 million (forecast for 2018), 12 million visitors to Niagara region

<p>Brand Positioning/Products</p>	<p>Target Market</p>	<p>Marketing</p>	<p>Access and Transport</p>
<p>"The Niagara-on-the-Lake Effect" with a focus on getaways. Showcasing fine dining, agriculture (wineries, farm markets), world class theatre and Heritage District, with shopping, spas, historical sites to supplement. 11 signature events. Shaw Festival.</p>	<p>Couples, groups (meetings, weddings, conferences)</p>	<p>Consumer website, print and digital visitor guide, social media</p>	<p>Highway access (QEW), Air (Toronto Pearson, Buffalo Niagara, Niagara District), Go Transit, Via Rail, equipped marina. Greater Toronto Airways, provides 12-minute flights from Toronto across the lake to Niagara at a cost of \$89</p>
<p>Structure</p>	<p>Investments</p>	<p>Skills and Labour</p>	<p>Accommodation</p>
<p>The Niagara-on-the-Lake Chamber of Commerce is the primary organization responsible for the development, promotion and encouragement of tourism. There are five staff members</p>	<p>Vrancor Hospitality Corporation has opened two new hotels — the 104-room Holiday Inn Express and 70-room Staybridge Suites, heritage designations</p>	<p>36,420 people were working in Niagara's tourism subsectors. Strong integration with Niagara College for skilled workers</p>	<p>Niagara region: 190 hotels & motels (including 5 star) and 134 b&b's</p>

APPENDIX 3 - COMPETITIVE ANALYSIS – STRATFORD



Overview: Located in the heart of Southwestern Ontario

Location: Near Toronto (155 km), Buffalo (206 km), Windsor/Detroit (243 km)

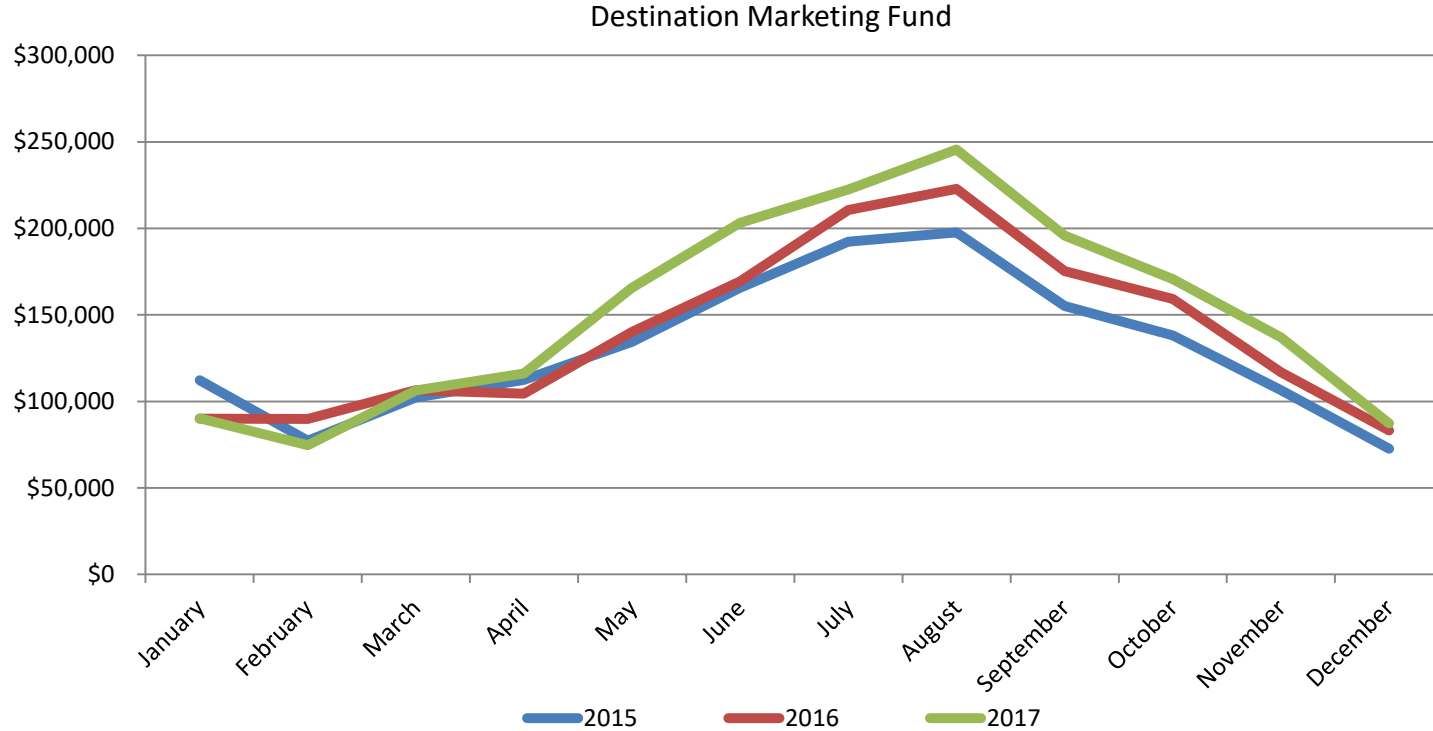
Population: 31,465 (2016)

Performance: 1.1 million visitors with \$113 million in spending (2014 Perth-Stratford), 512K to Stratford Festival in 2016

Brand Positioning/Products	Target Market	Marketing	Access and Transport
<p>“THE ARTS ARE WHAT WE ARE”. Showcasing the arts (theatres, galleries, music) and a beautiful town supplemented by golf, parks and gardens, shopping and spas. Stratford Festival</p>	<p>Couples, groups of friends</p>	<p>Google 360, digital and web ads, consumer website, publication and guides, media fams and pr, culinary trails, social media, travel media, local tradeshow</p>	<p>Highway access 401 or by Perth Road 113/County Road 6, 2.5 hour's drive of five US border crossings, seasonal Lake Erie Ferry, four international airports within a 1.5-hour drive, Via Rail, Stratford Festival shuttle, Cherry Bus Lines</p>
Structure	Investments	Skills and Labour	Accommodation
<p>Stratford Tourism Alliance (STA) acts as a partner driven, private sector led not-for-profit marketing organization that develops, manages and promotes "Destination Stratford" as a national and international tourism icon</p>	<p>STA budget for 2016 was \$815K, STA/RTO4/BIA partnered to enhance and promote Stratford as a cultural resort town (\$150,000)</p>	<p>Arts, culture and tourism represent 4,000 jobs in the regional economy</p>	<p>Range from full-service hotels to contemporary boutique inns; motels and resorts surrounded by gardens and parks; over 70 bed and breakfasts</p>




APPENDIX 4 - FUNDING - DESTINATION MARKETING FUND

Increased tax revenue will support marketing/promotion and a development fund.





Destination Marketing Funds collected by 24 of Kingston’s hotels and motels continue to grow year on year. In 2017, KAP collected approximately \$1.6M through the 3% voluntary fee from 24 accommodators, not including revenues from St. Lawrence College and Queen’s University. Kingston’s 4% Municipal Accommodation Tax (MAT) began in August 2018, estimates say that the MAT could generate up to \$3M from visitors.

APPENDIX 5 – TOURISM GOVERNANCE MODELS

Strengths	Destination Governance Models	Weaknesses	
<p>Work can proceed quickly, unencumbered by the formalities of a regular board process</p> <p>Often made up of the most engaged and passionate members of a tourism community that can do the lion’s share of work to support its success</p>	<p>Traditional or Informal</p> 	<p>The tourism industry can get left out as other shareholder interests take precedence</p> <p>Board representation, when aligned with priorities other than tourism growth for a region, can have a bias inconsistent with the best interests of that region</p> <p>Broader tourism industry stakeholders have little respect for the board and reduce their support for the organization</p> <p>Board members can change frequently depending on political changes</p>	
<p>Those that stand to benefit from investment in tourism are those that govern the organization</p> <p>Tried and true model found across DMOs around the world</p>		<p>Membership Based</p> 	<p>Little opportunity for other vested interests in the success of a DMO (i.e., City or regional investments, government investments, foundation investments, etc.)</p> <p>Members don’t always hold the competencies required for modern board governance</p> <p>Inherent bias common in decisions related to DMO strategy and execution</p>
<p>Funders in the tourism industry, expected to have the most stake in its success are the board members directing the strategy</p>			<p>Pay to Play</p> 

APPENDIX 5 – TOURISM GOVERNANCE MODELS, cont'd

Strengths	Destination Governance Models	Weaknesses
<p>“Political” appointments can be strong representations of political offices wielding influence which can support the interests of the destination for additional policy or investments.</p> <p>Strong regional, gender or skills based representation draws from a much wider pool of resources and can be very supportive to progressing a tourism DMO mandate</p> <p>Appointments can represent the major investors to safeguard their investments</p>	<p style="text-align: center;">  Appointments </p>	<p>Potential for conflict of interest</p> <p>Potential for long serving, overly assertive or antagonistic board members with high levels of influence over the strategy of the organization</p> <p>Insecure governance leads to challenging oversight of management teams and strategies</p> <p>Little governance in terms of board member expiry dates and meetings, minutes or guidelines. Where these do exist in terms of reference, guidelines are often ignored</p>
<p>Highly competent board members with a modern cross-section of skills to direct an organization</p> <p>Limited inherent bias as board members are recruited from industries and not necessarily tourism so don't necessarily benefit nor are impacted directly by board decisions taken</p> <p>Limited inherent bias may support the short, mid AND long term strategies for a destination</p> <p>Volunteers to board positions supporting not-for-profit and government organizations can hold an inherent sense of public service and act in the best interests of the organization</p> <p>Wide range of directors from other industries and government may bring parallel ideas and thinking to a destination</p>		<p style="text-align: center;">  Skills Based </p>



Twenty31 Consulting is an innovation and disruption focused management consultancy working with leaders of tourism organizations to define competitive advantage.

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