

KINGSTON

INTEGRATED DESTINATION STRATEGY

Co-creating an integrated destination strategy for Kingston –
moving beyond recovery to destination resiliency, 2022–2027

July 29, 2022

visit

WELCOME TO KINGSTON – KATAROKWI/ KEN'TARÓKWEN/GAADANOKWII

*Kingston is located on the traditional lands of
the Anishinaabe, Haudenosaunee Confederacy,
and Huron-Wendat First Nations.*

In Anishinaabemowin, this space is called "Gaadanokwii," which is interpreted to mean "a great meeting place." In Huron-Wendat it is known as "Ken'tarókwen" and in Mohawk it is known as "Ka'tarohkwi;" both are interpreted to mean "a place where there is clay." Clay in this context refers to the location of ancestral roots.

Tourism Kingston acknowledges the everlasting presence of other Indigenous nations, the Métis, Inuit, and other First Nations that now share this landscape with us. We are grateful to reside in and remain visitors to this territory, while acknowledging our shared responsibility to honour this space by walking gently and respectfully upon the land and preserving and purifying the surrounding waters.

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TABLE OF CONTENTS

Foreword	2
Acknowledgements	3
Acronyms & abbreviations	6
Methodology	7
Guiding principles	9
Challenges	10
Opportunities	14
Vision	20
Objectives	21
Pillars & initiatives	23

FOREWORD

Kingston's tourism industry has made tremendous progress since the first Integrated Destination Strategy (IDS) was developed in 2018. **It has fostered strong collaborative relationships among Tourism Kingston, Kingston Accommodation Partners, the City of Kingston, Kingston's tourism businesses, the community, and other key stakeholders across the region.**

Kingston's tourism industry has completed many initiatives that were critical to progressing its tourism industry and, in spite of COVID-19, has made gains in marketing, product development, sales, visitation, and revenue.

In short, **Kingston has advanced to become a sophisticated tourism destination under the leadership of the city, the accommodation community, Tourism Kingston, and other key partners**, providing an excellent foundation to take Kingston to the next stage, over the next five to 10 years.

That next stage recommends **a shift in mindset of what tourism has been in Kingston to a vision of what it could be. This includes a steadfast focus on significantly increasing tourism yield for Kingston during the peak season and addressing the perennial challenges of the visitor economy of lower visitation and revenue in the shoulder and winter seasons.**

This IDS addresses these objectives by recommending the development and enhancement of new products, experiences, infrastructure, and tourism investment attraction, as well as activating under-utilized but high potential assets for tourism including the Kingston Penitentiary, "converting" Kingston's creative industries into direct room nights, and considering the potential to tap into new source markets and market segments to stimulate awareness and visitation.

This IDS will go further in supporting a leadership position for tourism in Kingston. **It recommends Kingston's tourism industry undertake a stronger role to be recognized as a driver of city priorities – economic, social, and environmental to garner the support it needs for bigger private-public initiatives like a multi-purpose convention facility.**

This includes seeking recognition for the role that tourism in Kingston plays in enhancing community amenities like the downtown waterfront, and in supporting social challenges facing the community and the City of Kingston in its drive towards carbon neutrality.

Finally, **this IDS reflects the support of Kingston's tourism industry, its residents, local government, and Indigenous communities** that form the backbone of the success of the industry, and the crucial support of the key stakeholders on the Steering Committee, listed in the following pages, in developing Kingston's next plan for a strong tourism future.

ACKNOWLEDGEMENTS

Tourism is a collaborative effort. It is highly dependent on the industry that it supports from a wide array of stakeholders directly and indirectly engaged in developing and supporting the conditions for tourism to thrive.

This strategy has been developed with extensive consultation from a wide variety of tourism stakeholders from all parts of the region.

We are thankful for their support, participation, and ideas to help develop tourism, protect the industry from disruptive forces, and consider new ways for Kingston's tourism industry to adapt to a new tourism future.

Tourism Kingston board members

- // Sean Billing, Frontenac Club
- // Wayne Buller, Correctional Service of Canada
- // Stephen Burnett, Great Lakes Cruise Association
- // Jeff Downie, Universus
- // Scott Follwell, Diamond Hotels Management Inc.
- // Heather Ford, Green Acres Inn
- // Mathew Fry, Courtyard by Marriott Kingston
- // Donna Gillespie, Kingston Economic Development Corporation
- // Councillor Wayne Hill, City of Kingston
- // CAO Lanie Hurdle, City of Kingston
- // Krista LeClair, Kingston Accommodation Partners
- // Lucy Liu, The Rosemount Inn
- // Jan MacDonald, Downtown Kingston Business Improvement Area
- // Christopher Marz, Holiday Inn Waterfront
- // Aba Mortley, Cher-Mere Day Spa
- // Mayor Brian Paterson, City of Kingston

Kingston Accommodation Partners board members

- // Scott Follwell, Diamond Hotels Management Inc.
- // Heather Ford, Green Acres Inn
- // Mathew Fry, Courtyard by Marriott Kingston
- // Peter Karkoulis, Travelodge Hotel by Wyndham Kingston
- // Lucy Liu, The Rosemount Inn
- // Christopher Marz, Holiday Inn Kingston-Waterfront
- // Madelene Medeiros, Ambassador Hotel & Conference Centre
- // John Owen, Best Western Fireside Inn
- // Michael Springer, Diamond Hotels Inc.
- // Ryan Rowe, Residence Inn by Marriott Kingston Water's Edge

IDS Steering Committee

- // Stephen Burnett, Great Lakes Cruise Association
- // Marijo Cuerrier, Downtown Kingston Business Improvement Area
- // Heather Ford, Green Acres Inn
- // CAO Lanie Hurdle, City of Kingston
- // Alex Jansen, Kingston Film Office
- // Krista LeClair, Kingston Accommodation Partners
- // Hugh Mackenzie, Kingston Destination Group
- // Jamie McKenzie-Naish, Kingston Association of Museums, Art Galleries and Historic Sites
- // Michael Springer, Diamond Hotels Inc.
- // Brandon Tattersall, Leon's Centre
- // Steve Weir, Regional Tourism Organization District 9

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thanks

Tourism Kingston staff

- // Lexy Correa, Digital Marketing and Communications Coordinator
- // Moira Demorest, Music Commissioner
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- // Megan Knott, Executive Director
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Kingston Accommodation Partners staff

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- // Krista LeClair, Executive Director

Consultations

- // Tourism Kingston Marketing Committee
- // Tourism Kingston Sales Committee
- // Tourism Kingston Attractions Committee
- // Springer Group
- // Regional Tourism Organization District 9
- // Frontenac County
- // Haunted Walks
- // County Sips
- // City of Kingston

- // Kingston Accommodation Partners
- // St. Lawrence Parks Commission
- // Kingston Economic Development Corporation
- // Kingston Chamber of Commerce
- // Downtown Kingston Business Improvement Area
- // Kingston Destination Group
- // Holiday Inn

And, a big thank you to the many not mentioned here who have shared their insights and guidance along the way.

ACRONYMS & ABBREVIATIONS

AB: Alberta

BC: British Columbia

BIA: Business Improvement Area

DMO: Destination Management/Marketing Organizations

GLCA: Great Lakes Cruise Association

GTA: Greater Toronto Area

HR: Human Resources

IDS: Integrated Destination Strategy

KAM: Kingston Association of Museums,
Art Galleries and Historic Sites

KAP: Kingston Accommodation Partners

KEDCO: Kingston Economic Development Corporation

LGBTQ+: Lesbian, Gay, Bisexual, Transgender, Queer,
Pansexual and Two-Spirit

MAT: Municipal Accommodation Tax

MHSTCI: Ontario Ministry of Heritage, Sport,
Tourism & Culture Industries

MICE: Meetings, Incentive, Conventions, and Exhibitions

MP: Member of Parliament

MPP: Member of Provincial Parliament

OTA: Online Travel Agent

PEC: Prince Edward County

RTO9: Regional Tourism Organization 9

TIAC: Tourism Industry Association of Canada

TIAO: Tourism Industry Association of Ontario

TK: Tourism Kingston

QC: Québec

METHODOLOGY

It is critical that Kingston's IDS be rooted in evidence and that this evidence comes from triangulating multiple sources of information. This is necessary to ensure a holistic understanding of the current tourism context and to gain buy-in from individuals that have a stake in the outcome of the strategy.

The Discovery phase included a review of existing strategies, plans, research, and more, as well as engagement with key tourism stakeholders (see **Appendix A** for key findings). A situational analysis was completed using that essential research and review process.

Phase two focused on assessing all the data and insights collected during the Discovery phase and prioritizing the most important initiatives identified based on the impact they may have in achieving the objectives set forth, and their ease of implementation (see Initiative Prioritization Assessment and Initiative Prioritization Assessment Results in **Appendix B**).

Finally, in phase three of the methodology, Action, the strategy began to take shape, but not without the input of the IDS Steering Committee and Tourism Kingston's leadership and staff.

While many stakeholders supported the development of this strategy, others may need to be engaged during the continued planning and implementation phases of individual initiatives.

1. DISCOVERY

Documents and materials review

Kingston familiarization tour

Stakeholder interviews

Visioning workshops

Tourism stakeholder community surveys

March-May 2022

2. PRIORITIZATION

Inputs assessment

Steering Committee prioritization lab

Insights analysis

May-June 2022

3. ACTION

Drafting of strategy

Strategy feedback

Strategy finalization

June 2022

How to read this document: a tourism strategic planning framework

Tourism strategies typically rely on historical data, research, and insights to identify challenges and opportunities: those that need management, and those that need acceleration.

The framework used to first structure Kingston’s IDS allows for the flexibility needed to navigate a post-pandemic tourism environment. It is rooted in evidence, informed by a detailed understanding of the tourism context and engagement through myriad interviews and workshops with Kingston’s tourism leaders and many tourism stakeholders in the community, in order to structure a path forward.

The outlined strategy begins by first laying out tourism values, through guiding principles, that Kingston wants to ensure remain constant as it executes its strategic direction moving forward. It is followed by an understanding of key short, medium, and long-term challenges and opportunities, before setting the vision – along with the strategic objectives necessary to achieve that vision.

With strategic objectives set, details of the strategy begin to emerge with a breakdown of initiatives by pillar along with key tactical actions, timelines, responsible stakeholders, and measures for each to ensure the successful implementation of the strategy over the next months and years to come.

GUIDING PRINCIPLES	Values that guide tourism stakeholders to accomplish its vision
CHALLENGES & OPPORTUNITIES	Short and long-term barriers that need to be addressed
VISION	Direction for tourism in Kingston that reflects tourism stakeholder needs, potential visitors, and the communities that are served
OBJECTIVES	Intentions Kingston sets to develop or enhance tourism
PILLARS & INITIATIVES	<p>Initiatives organized in pillars that:</p> <ul style="list-style-type: none"> // Can be supply-driven reflecting a certain currently underleveraged competitive opportunity; // Can be demand-driven like an under-targeted group of prospective visitors; and, // Are prioritized based on impact and ease of implementation
TACTICAL ROADMAP	<p>Includes actions and timelines that:</p> <ul style="list-style-type: none"> // Support implementation of objectives and initiatives; // Ensure conditions for success are met and that there are sufficient resources to develop opportunities; // Oversee tourism enabling environment and infrastructure support for product and experience development/enhancement; and, // Include approach for targeting key markets of those who might be willing to travel to Kingston.

GUIDING PRINCIPLES

Guiding principles represent the shared values and beliefs of a destination's tourism industry. For Kingston, they guide the sometimes difficult decisions that need to be taken, and that apply in all circumstances, regardless of changes in goals, strategies, type of work, or management.

1. We focus on the betterment of Kingston residents through tourism, balancing economic objectives with social and environmental priorities.
2. We collaborate across all tourism stakeholders – residents, tourism industry members, local/regional government, and key institutions and industries in Kingston to leverage tourism opportunities.
3. We align with major city government and other public and private sector initiatives that reflect the tourism potential including leveraging creative industries, environmental initiatives, and similar priorities.
4. We celebrate the diversity of our destination by striving to ensure all players in our tourism ecosystem are represented and included.
5. We root our decisions in evidence and measure results of our actions enabling us to take calculated risks while also being accountable and responsible to all stakeholders.

CHALLENGES

The discovery conducted to inform Kingston's strategic plan delved deeply into understanding the systemic challenges impacting tourism in the region directly from Kingston leadership and staff as well as many other public and private sector tourism stakeholders – in addition to a study of the current tourism environment globally, domestically, provincially, and locally.

While the list below does not represent all tourism challenges that Kingston faces, it outlines the most critical ones.

Challenges are divided into two categories:

1. Those that have an immediate impact on tourism in the short-term; and
2. Longer-term, systemic challenges facing tourism in Kingston.

1. Challenges that have an immediate impact on tourism recovery in the short-term

Challenge	Description	Potential impact	Management / Actions
1. Labour	<p>// Insufficient trained labour across almost all sectors leading to limited staff for direct and indirect tourism businesses and organizations</p>	<p>// If not addressed, upcoming tourism seasons may be severely impacted, potentially leading to reduction in products and services and/or quality of products and services, dissatisfied visitors, and in turn, further operator closures</p>	<p>// Engage a broad-Kingston tourism labour committee to assess actual labour situation and develop potential solutions to overcome identified challenges</p> <p>// Examples to overcome labour challenges include working with education institutions for youth employment, seniors and newcomers to encourage training and support, or providing more affordable housing/commuting options</p>
2. Perceived value of tourism	<p>// Global, Canadian, and Ontario-based backlash against the tourism industry caused by perceptions of tourism as a driver of pandemic and “over-tourism”</p> <p>// Perception that tourism is taxpayer-funded and competing with other social priorities in the community like the environment, people without housing, etc.</p>	<p>// Lack of community support leads to lack of council support for tourism – not being recognized for public contributions tourism makes to the community</p> <p>// Lack of support for large-scale infrastructure projects like convention centre which would require council and funding support</p>	<p>// Conduct stakeholder analysis to identify stakeholders and specific messaging and communication needs</p> <p>// Starting with stakeholders most amenable to tourism, communicate importance of tourism to support economy and quality of life</p> <p>// Seek support from council members to support larger tourism infrastructure projects</p>
3. Economic inflation & cost of goods	<p>// Continued challenges due to economic issues exacerbated by global conflicts make supplies more costly to purchase, more difficult to find, and longer to acquire</p>	<p>// Costly supplies caused by inflation and economic challenges may discourage operators with smaller margins, or who have been burnt out from the last two years, which may impact operating models making them slower to recover or threaten viability altogether</p>	<p>// Identify areas most impacted by economic situation to understand those most in need of operator support</p> <p>// Develop support and mentorship programs to support operators in addressing economic challenges</p>

2. Longer-term, systemic challenges facing tourism in Kingston

Challenge	Description	Potential impact	Management / Actions
1. Mindset shift to year-round tourism	<ul style="list-style-type: none"> // Many tourism businesses operate seasonally – closing during winter and shoulder seasons // Fatigue from intense summer season and lack of year-round labour exacerbate challenge 	<ul style="list-style-type: none"> // Loss of potential tourism revenue due to closure of tourism businesses and perception of limited things to do in the winter/shoulder season // Other destinations that provide winter/shoulder season options take visitor share from Kingston 	<ul style="list-style-type: none"> // Demonstrate economic and social value of year-round tourism support to stakeholders through stakeholder communications, training, and programs // Review potential for subsidy funding and/or further investment in off-season marketing and packaging
2. Attraction of tourism investors & entrepreneurs	<ul style="list-style-type: none"> // Topics like seasonality, labour shortages, and social issues challenge investors and entrepreneurs to find opportunities and take risks to develop business that support tourism industry 	<ul style="list-style-type: none"> // Lack of investment in existing under-utilized assets or new projects cause loss of potential tourism revenue and social benefit to the community 	<ul style="list-style-type: none"> // Understand potential investor and entrepreneur needs for taking over under-utilized assets and starting new businesses // Work with innovation/entrepreneur centres to identify investment/startup opportunities // Develop investment attraction strategy and plan by asset, rolled up for tourism as a whole, and execute it

Challenges (continued)

Challenge	Description	Potential impact	Management / Actions
<p>3. Differentiation to entice longer stays & more visitor spending</p>	<p>// Challenge to find ways to differentiate Kingston enough to entice visitors to come to the city and stay longer</p> <p>// Proximity to major metropolitan areas like Greater Toronto Area (GTA), Ottawa, and Montreal, both a blessing for access to large markets, but a curse due to consumer attention and interest dilution</p>	<p>// Some visitors bypass or decide to spend less time in Kingston due to neighbouring competition causing loss of potential tourism revenue</p>	<p>// Lean on creative industries, tourism as a social enterprise culture, unique assets, and access to universities to support creation of unique and desired visitor offerings (that also benefit the community)</p> <p>// Communicate Kingston's points of differentiation to identified target markets and potential consumers</p>
<p>4. Social issues</p>	<p>// Social topics like people without housing, safety, and lack of pedestrian zones, etc., impacting the community and the tourism industry</p>	<p>// May cause visitors to have negative experience in Kingston leading to fewer repeat visits and negative reputation spread via word-of-mouth or social media</p> <p>// Similar topics cause local communities to deprioritize funding of tourism initiatives that may increase community wealth, in support of social issues</p>	<p>// Join Kingston's Tourism Social Issues Committee to identify ways of addressing social issues</p> <p>// Communicate actions taken by tourism leadership to address most pressing social issues for the benefit of the community as well as visitors</p>

OPPORTUNITIES

At the same time, stakeholder engagements and a review of key tourism trends revealed opportunities that Kingston can leverage to achieve possible outcomes over the next three years.

While the list below does not represent all tourism opportunities that are available to Kingston, it outlines opportunity themes that may be most critical to Kingston's future.

Opportunity themes can be grouped in two categories:

1. Immediate and short-term opportunity themes; and,
2. Medium and long-term opportunity themes.

1. Immediate and short-term opportunity themes

Opportunity	Description	Potential impact	Management / Actions
<p>1. Creating culture of tourism as a social enterprise</p>	<p>// Focus on communicating tourism as a force for good – supporting the local economy, as well as social and environmental priorities</p> <p>// Focus on establishing a tourism as a social enterprise culture that is progressive and cognizant of all challenges and opportunities in a triple bottom line approach</p>	<p>// Shifts community and public-private-sector mindset of one solely focused on economic priorities, to one that also prioritizes social and environmental ones</p> <p>// Linking interplay of economic, social, and environmental priorities to work together in a triple bottom line approach to achieve societal objectives to draw greater support for tourism from the community and from local government</p>	<p>// Enable tourism leadership to focus on establishing tourism as a social enterprise in Kingston through implementation of the updated IDS</p> <p>// Communicate strategy and priorities with key stakeholders to demonstrate value of tourism as a social enterprise</p>
<p>2. Packaging & itinerary development</p>	<p>// Creating packages and itineraries of things to do in Kingston makes it easier and more enticing for visitors to visit (and more often), stay longer, and spend more</p>	<p>// More visitors come to Kingston because they are easily able to find and/or create experiences they are seeking (backed by research evidence)</p>	<p>// Create inventory of tourism products and experiences across Kingston and the region</p> <p>// Consider identifying and developing packages, itineraries, and uniquely Kingston experiences</p> <p>// Leverage technology to facilitate how travellers choose and book visit</p>
<p>3. Nimble highly targeted (digital) marketing campaigns</p>	<p>// Kingston has much to offer and is in reasonable driving distance from major urban market (i.e., GTA, Ottawa, and Montreal)</p> <p>// Focus on the vibe that Kingston offers to attract existing and different segments from major urban markets through highly targeted digital campaigns</p>	<p>// Development of marketing campaigns to reach high-volume of potential travellers; aligned under a single Kingston brand</p>	<p>// Continue to develop marketing campaigns to create interest and immediate travel decisions, along with diverse and inclusive marketing assets (e.g., images, videos, etc.)</p> <p>// Ensure marketing plans remain nimble to anticipate tourism limitations caused by external factors like new COVID-19 variants, border restrictions, etc.</p>

Opportunities (continued)

Opportunity	Description	Potential impact	Management / Actions
<p>4. Travel trade channels</p>	<p>// Work with travel trade, particularly post-COVID, to leverage packaging and communication channels to entice targeted visitors to Kingston in the areas of cruise, bus, and air services</p>	<p>// More visitors come to Kingston because they are easily able to find and/or create experiences they are seeking (backed by research evidence)</p> <p>// Generation of tourism wealth for Kingston communities and tourism stakeholders</p>	<p>// Identify potential travel trade partners to create relationships and communicate list of Kingston offerings</p>
<p>5. Collaboration with regional and provincial tourism partners</p>	<p>// Continue to grow partnerships with regions (e.g., PEC, Frontenac, Leeds and Grenville, Gananoque, 1000 Islands as well as into the 1000 Islands tourism group in the U.S., etc.)</p>	<p>// Increase length of stay and total revenue. As Kingston is central accommodation centre of the region, there is opportunity to increase number of itineraries and day trips centred around Kingston</p>	<p>// Develop or enhance regional partnerships and expand networking opportunities</p>
<p>6. Indigenous tourism</p>	<p>// Indigenous tourism is in demand. There are several potential initiatives across the Kingston region that reflect Indigenous culture and are of interest to visitors. These have not yet been fully explored</p>	<p>// Indigenous tourism helps to tell the authentic story of Kingston pre- and post-Confederation while at the same time strengthening and protecting Indigenous cultures and heritage.</p> <p>// More tourism products and experiences are developed leading to higher potential revenues for tourism/Indigenous tourism</p>	<p>// Develop business case to engage in Indigenous tourism together with Indigenous tourism leaders and their communities</p> <p>// Support development of an inventory of key stakeholders and current assets that support Indigenous tourism and identify potential gaps</p>

2. Medium and long-term opportunity themes

Opportunity	Description	Potential impact	Management / Actions
<p>1. Addressing seasonality for year-round tourism</p>	<p>// Extending season into the shoulder and winter seasons is seen as primary opportunity to generate additional tourism revenue</p>	<p>// Development of shoulder and winter tourism offerings creates more opportunities for visitors to come to Kingston</p> <p>// More businesses focused on shoulder and winter tourism generate additional revenue and support year-round labour, improving overall quality of services</p>	<p>// Focus on enhancing shoulder and winter tourism supply</p> <p>// Study inventory of existing businesses open year-round to identify potential gaps and areas of opportunities</p> <p>// Connect investors and entrepreneurs to create additional shoulder and winter products, offerings, and packages</p>
<p>2. "Converting" creative industries for tourism and room nights</p>	<p>// Kingston's creative industries priority for local government reflects the major tourism assets that define a competitive advantage for Kingston. However, these assets are not fully optimized or converted into room nights</p> <p>// Opportunity exists to define how music, film, arts, and theatre are converted to directly support tourism</p> <p>// Consider current product – leverage consumer-ready product now, and develop new product over longer-term</p>	<p>// Kingston's burgeoning creative industries can drive strong visitation and revenue – whether visitors are coming to enjoy artists or coming to Kingston to support an aspect of creative industries (e.g., filmmakers)</p> <p>// Supports organic communication of Kingston's 'cool' vibe and improves sense of pride</p>	<p>// Work with creative industries leadership to develop tourism development plan and execute</p> <p>// Set aside percentages of tickets to create packages with hotels, transportation, dining, etc., to draw visitors to experience the unique creative assets of Kingston</p>
<p>3. Expanding levy beyond hotels</p>	<p>// The hotel levy (now the MAT) has generated significant funding to support tourism initiatives without impacting visitor spend</p> <p>// There may be an opportunity to expand a levy beyond hotels to include other tourism businesses like restaurants and attraction.</p>	<p>// Expansion of a voluntary levy would enable creation of additional funds for City of Kingston and tourism</p> <p>// Can enable support of more capital-intensive projects like new conference centre, sport facilities, waterfront infrastructure, etc.</p>	<p>// Study potential for voluntary levy beyond hotels</p> <p>// Ensure Kingston Tourism Steering Committee is aligned with study recommendations</p> <p>// Mobilize tourism industry to support voluntary levy study recommendations</p>

Opportunities (continued)

Opportunity	Description	Potential impact	Management /Actions
<p>4. Optimizing under-utilized assets for tourism</p>	<p>// From the Kingston Penitentiary, to Rockwood Asylum, to the downtown area, and many more – Kingston has many potential “tourism assets” that are under-utilized that can be innovatively and respectfully optimized to support tourism</p>	<p>// Many under-utilized assets could benefit from some refurbishment and activation to quickly enable their use as part of the tourism experience</p> <p>// Potential for projects to require less time and money versus developing new assets – while also improving overall tourism experience</p>	<p>// Prioritize under-utilized assets across Kingston based on potential for greater returns in alignment with the triple bottom line approach</p> <p>// Work with partners to advocate for and implement under-utilized tourism asset projects</p> <p>// Consider innovative programming of these assets to support winter- and shoulder-season tourism</p>
<p>5. Public amenities</p>	<p>// While many public amenities may be cost-intensive, they significantly improve the overall visitor experience</p> <p>// In some instances, these amenities are perceived to be “basic” services and foundational to the tourism experience. Examples include public restrooms, Wi-Fi, parking for coaches, electric vehicle charging stations, e-bike rentals, etc.</p>	<p>// Lack of public amenities may not hinder an immediate visit, but can potentially create experiences that dissuade visitors from returning and cause reputational harm</p> <p>// Community values benefit from tourism due to its support of developing public amenities that add to resident quality of life</p>	<p>// Identify potential opportunities for development of public amenities across Kingston</p> <p>// Prioritize public amenities based on those with greatest potential returns, in alignment with the triple bottom line approach</p> <p>// Work with partners to advocate for, and implement under-utilized tourism asset projects</p>
<p>6. Integration of sustainable tourism & inclusivity across tourism programs</p>	<p>// Regenerative, sustainable, and inclusive tourism are amongst the most important guiding principles for Kingston and its tourism stakeholders</p> <p>// Opportunity to incorporate sustainability measures across tourism initiatives and programs Kingston offers</p>	<p>// Tourism Kingston leads by example, providing tourism businesses support to meet partner needs while providing diverse offerings for different types of visitors</p> <p>// Support environment for future generations and Kingston becoming a source of inspiration for the industry through internal sustainability practices</p>	<p>// Conduct audit of programs such as product and destination development, marketing and communications, etc., to determine how to incorporate regenerative/sustainable tourism and inclusivity measures through incentives</p> <p>// Measure and track sustainability performance</p> <p>// Develop and maintain a public commitment to improve sustainability performance</p> <p>// Complete a sustainable tourism audit and create sustainable plan</p>

Opportunities (continued)

Opportunity	Description	Potential impact	Management /Actions
<p>7. Infrastructure assets: multi-purpose convention facility</p>	<p>// Kingston lacks contiguous space demanded by meeting planners to host medium-sized conventions</p> <p>// Kingston holds many other amenities that would attract meeting planners and delegates such as culture, hotels, waterfront, heritage, higher education institutions, and proximity to three corporate urban centres</p> <p>// Kingston has commissioned a study suggesting it would be ideal to build a convention facility</p> <p>// Consider adding additional amenities to convention facility such as more multi-purpose options (e.g., year-round attraction, Indigenous centre, art gallery, cooking school, hospitality learning centre, hotel, etc.), that would add additional support to the facility</p>	<p>// A convention facility would have significant impact on Kingston’s ability to drive hotel stays during the winter and shoulder seasons and increase rate and spend in Kingston year-round</p> <p>// There is new post-COVID evidence that remote teams will seek to meet in-person for retreats at interesting locations a few times per year. Kingston will be well-positioned to host these in-person, remote, and other conventions and meetings</p>	<p>// Continue to seek funding through multiple levels of government and the private sector to build a convention facility</p> <p>// Consider seed funding support and yearly commitment from the tourism levy to enhance public funds</p>

VISION

Kingston's tourism vision is an aspirational view of the future for tourism in Ontario's Southeast meant to inspire visitors, staff, partners, and residents while providing guidance on how to get there successfully.

Vision

To develop, optimize, and enhance Kingston's visitor economy assets and infrastructure across all seasons to attract visitors for leisure, meetings, sports, group travel, and creative industries – to grow year-round tourism revenue while leveraging tourism's potential to positively influence resident quality of life, key partner groups, and the environment.

We will achieve this vision only through the support of residents, government, Indigenous communities, tourism stakeholders, and other interested and affected parties.

vision

OBJECTIVES

Development of Kingston's IDS began by acknowledging that Tourism Kingston was in a special position, given all that it had accomplished since the first IDS, approved in 2019, despite the current socio-economic situation caused by the COVID-19 pandemic.

Kingston is, however, ready to take on new challenges and opportunities post-COVID-19, which will require a prioritization of local governments to focus on developing and enhancing key tourism assets including the Kingston Penitentiary, creative industries, and other key assets – to create additional room nights, and year-round tourism revenue.

In order to accomplish this, Kingston will need the support of its residents, local government, Indigenous communities, and key stakeholders such as Kingston Accommodation Partners, Kingston Association of Museums, Art Galleries and Historic Sites, Downtown Kingston, the Kingston Chamber of Commerce, Kingston Economic Development Corporation, and other private and public sector stakeholders, to work together in pursuit of Kingston's' tourism vision.

pillars

PILLARS & INITIATIVES

Kingston's IDS can be broken down in four main pillars and an additional one for future initiatives to consider that support long-term objectives.

Each pillar contains a number of initiatives that Kingston should undertake over the next three years to achieve its vision.

1. Social enterprise culture	2. Tourism experience	3. Tourism revenues	4. Longer-term developmental wins	5. Long-term sport and wellness initiatives
<p>Establish leadership culture for tourism as a social enterprise</p> <ol style="list-style-type: none"> 1. Assign IDS execution oversight to Tourism Kingston Board 2. Communicate tourism plans with community and key tourism stakeholders 3. Collect and share consumer and resident sentiment research 4. Develop a creative industries tourism plan 5. Study potential to expand voluntary levy beyond hotels 6. Develop and communicate tourism investment attraction plan 7. Expand adoption of Kingston's brand 	<p>Enhance Kingston tourism products & experiences</p> <ol style="list-style-type: none"> 8. Address immediate labour bottlenecks 9. Support creation of flexible packages and itineraries 10. Develop/enhance enticing shoulder/winter tourism products 11. Enhance culinary tourism in Kingston 12. Identify tourism "districts" in Kingston 13. Create a sustainable tourism development plan 14. Leverage under-utilized assets for tourism 	<p>Grow tourism revenue over next three years</p> <ol style="list-style-type: none"> 15. Create targeted, flexible campaigns in Ontario 16. Create flexible campaigns targeting key provincial markets 17. Create flexible campaigns targeting new markets 18. Support multi-channel visitor services program with focus on operators 	<p>Focus on longer-term development tourism prosperity</p> <ol style="list-style-type: none"> 19. Launch conference centre development 20. Create and animate downtown pedestrian-only zones 21. Improve relationship with Queen's University 22. Support access to public amenities (e.g., Wi-Fi, washrooms) 23. Activate and access the waterfront 24. Establish partnership to develop a deep-water dock 	<p>Long-term initiatives to consider should resources become available</p> <ol style="list-style-type: none"> 25. Implement a sport and wellness tourism strategy that aligns with the Recreation and Leisure masterplan and current City of Kingston's facility plans for sports facilities improvements + infrastructure developments

Pillar 1 initiatives: social enterprise culture

Initiative 1: Assign IDS execution oversight to Tourism Kingston Board

Description/Rationale

- // For any DMO, updating and overseeing execution of a tourism strategy can be a daunting task. However, 2022 and the next two years will not be normal years with more destinations coming to the fore post-COVID, and a smaller number of visitors willing to venture further away from home. Tourism stakeholders (visitors, residents, operators, retailers, enablers, etc.) need Tourism Kingston to ensure that the plan it is putting in place is also executed successfully.
- // First and foremost, the IDS recommends assigning implementation to the Tourism Kingston Board to be accountable and responsible for its realization and provide guidance and oversight to the many stakeholders that will also be involved with its effective execution.
- // It will be equally important for members of the Tourism Kingston Board to be the face and voice of tourism as a social enterprise within their organizations, communities, and with other public- and private-sector organizations.

Tactical actions

- // Formally assign IDS execution to the Tourism Kingston Board upon approval of the IDS.
- // Ensure the IDS is used by relevant, responsible stakeholders as part of their annual business plans to oversee effective implementation of initiatives and reference to all committees to show progress against those plans.
- // Meet regularly to get updates from various initiative leads, address challenges, and leverage learnings.
- // Create quarterly reports presented to all members of the Tourism Kingston Board as well as City Council.

Timeframe/Trigger

- // Immediate (0-1 months)

Roles

- // Tourism Kingston (co-lead)
- // Kingston Accommodation Partners (co-lead)
- // Public and private sector organizations supporting IDS execution (support)
- // City of Kingston (report)

Outcomes

- // Effective implementation of the IDS to meet defined outcomes and objectives
- // Continuous updates on status of implementation to key stakeholders

Pillar 1 initiatives: social enterprise culture (continued)

Initiative 2: Communicate tourism plans with community and key tourism stakeholders

Description/Rationale

- // Despite noted improvement in communication and collaboration reported by tourism stakeholders across Kingston's tourism landscape since the last IDS, there is an opportunity for improvement with a particular emphasis on the role that tourism plays to support economic, social, and environmental opportunities through a triple bottom line approach.
- // Most tourism stakeholders showed interest in learning more about tourism opportunities, especially in a post-COVID environment, and tourism operators, investors, and entrepreneurs noted a need for additional collaboration opportunities including with public sector tourism partners and industry associations.
- // This initiative focuses on communicating the role of tourism in Kingston as a force for social good by conducting a stakeholder analysis and identifying each stakeholder's needs, supported by research conducted in **Initiative 3** to determine key messages, channels, timing, etc., to ensure most effective ways of communicating with Kingston communities and key tourism stakeholders.
- // It also focuses on providing more opportunities for collaboration by connecting tourism stakeholders so that they can work together to generate solutions to the most pressing challenges and support tourism growth. This includes developing opportunities to collaborate across the regions and counties, including PEC, and partnerships in the U.S. as well as Frontenac County
- // Finally, if Tourism Kingston continues to be expected to support key community-based initiatives, it will need a new source of funding, some of which may be addressed in **Initiative 5**.

Tactical actions

- // Collaboration opportunities for both Tourism Kingston as well as Kingston Accommodation Partners.
- // Create and execute a local tourism stakeholder communication plan so that residents within the city of Kingston understand the IDS and the impact the strategy will have in strengthening our community.
- // Kingston Accommodation Partners communicate the importance and value of tourism to all levels of government.

Timeframe/Trigger

- // Short-term
- // Ongoing

Roles

- // Tourism Kingston (co-lead)
- // Kingston Accommodation Partners (co-lead)
- // Three levels of government and Kingston residents (audience)

Outcomes

- // Clear understanding of Kingston's tourism stakeholder communication and collaboration needs
- // Detailed tourism stakeholder communication plan and implementation
- // Improved tourism stakeholder satisfaction with communications and collaboration opportunities
- // Additional funding for tourism initiatives

Pillar 1 initiatives: social enterprise culture (continued)

Initiative 3: Collect and share consumer and resident sentiment research

Description/Rationale

- // COVID-19 has had an immense impact on the tourism industry. From consumer behaviours to how destinations communicate with potential visitors, and so much more. These changes need to be continuously understood to make the best decisions for destinations and tourism stakeholders. This includes:
 - Trends research to clarify expected shifts in global, domestic, and local tourism.
 - Competitive research to position Kingston, peer destinations, and other threats.
 - Consumer research in primary and up-and-coming target markets (e.g., Ontario, Québec, the U.S., and other potential markets), to understand travel consumer needs, behaviours, and path-to-visit.
 - Local sentiment research to ensure local perceptions are considered as part of developed strategies.
- // Research needs to be sophisticated enough to support tourism operators and businesses in understanding nuances, yet practical enough to be able to make decisions based on insights derived. Research may be conducted at a point in time (e.g., market segment research) while also providing continuous updates to the industry in a standard format.
- // Product Development Research Report outlines the need for visitor surveys throughout all of Kingston's attractions.

Tactical actions

- // Collect, analyze, share, and report on global, domestic, and local tourism trends research with committees and other tourism stakeholders.
- // Collect, analyze, share, and report on competitor research with committees and other tourism stakeholders.
- // Collect, analyze, share, and report on primary target market research conducted through surveys and digital listening with committees and other tourism stakeholders.
- // Conduct pulse checks on local sentiment, potentially including community engagement sessions to understand local needs and share with tourism stakeholders.
- // Explore ways to share data and insights on implications with stakeholders, operators, public sector, and other tourism organizations through online solutions.
- // Accommodations provide reports to show occupancy data including packaging details and lost business reports.

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing

Roles

- // Tourism Kingston (co-lead)
- // City of Kingston, Strategy, Innovation & Partnerships (co-lead)
- // Tourism research partner (co-lead)
- // Kingston Accommodation Partners (support)
- // Tourism operators (support)

Outcomes

- // Detailed and insightful research on tourism and competitive trends
- // Detailed research on Kingston consumer markets and segments
- // Report findings with Tourism Kingston's three committees
- // Dissemination of research to stakeholders
- // More informed operator decision-making leading to additional tourism revenues

Pillar 1 initiatives: social enterprise culture (continued)

Initiative 4: Develop a creative industries tourism plan

Description/Rationale

- // The City of Kingston identified a competitive advantage in developing the creative industries due to its many talented local artists and its cultural amenities such as film locations, museums, theatres, art museums, music, etc.
- // While these amenities are currently available and being developed by regional and local governments, it is not always clear how this creative competitive advantage converts into a tourism visit. Consideration could be given to a percentage of performances and exhibition tickets being saved for visitors or packaged with hotels and other key attractions in Kingston. Further, some of these popular performances could target Sunday evenings to extend a weekend stay, for example.
- // Kingston's brand is based on the creative industries. This opportunity may include making space for colleagues in heritage and Indigenous areas, working with Kingston's many great musicians as a music and entertainment hub.
- // Additionally, Kingston's brand could benefit from extension into developing products and experiences to support the "night economy" to bring visitors to a vibrant music and arts scene downtown.
- // Kingston needs to be inclusive of what is considered in creative industries (like manufacturers, suppliers, and others), and ensure initiatives are collaborative and communicated.
- // As outlined in the Integrated Economic Development Strategy Kingston needs to foster and support growth in the creative industries. This includes, but is not limited to offering skills and training, supporting emerging sectors, and building the narrative.

Tactical actions

- // Tourism Kingston and the City of Kingston to work closely on areas to demonstrate creative industries tourism initiatives and outcomes.
- // Tourism Kingston to develop a process to review creative industries amenities and determine how to categorize them for tourism conversion.
- // Tourism Kingston to consider converting creative industries with packaging developed in **Initiative 9**.
- // Continue to engage local artists in workforce development in creative industries to support economic development, labour, and outputs of product for film, music, and theatre.

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing (supporting Creative Industries 10-year plan)

Roles

- // City of Kingston, Arts & Cultural Services (co-lead)
- // Kingston Economic Development Corporation (co-lead)
- // Tourism Kingston (co-lead)
- // Tourism operators (support)
- // Creative industries including those managed by other entities (support)
- // Downtown Kingston for night economy product and experience development (support)

Outcomes

- // Amplify Kingston's existing reputation related to its culture, heritage, arts, and theatre
- // Tickets for shows, performances and exhibitions are set aside for packaging with hotels drive visitation and tourism revenue across all seasons
- // Create a standalone Creative Industries organization

Pillar 1 initiatives: social enterprise culture (continued)

Initiative 5: Study potential to expand voluntary levy beyond hotels

Description/Rationale

- // Kingston's MAT has generated significant funding to support tourism initiatives across the city without impacting potential visitor spend with accommodation partners.
- // The expansion of a voluntary tourism levy beyond hotels would enable creation of additional funds for the City of Kingston as well as tourism stakeholders, by enabling support of and investment in more capital-intensive projects like a new conference centre, sport facilities, waterfront infrastructure, etc.
- // Kingston has an opportunity to expand voluntary tourism levy beyond hotels to potentially include a voluntary tourism levy for other types of businesses (e.g., food and beverage, attractions, etc.).
- // A key aim of such an endeavour would be to provide an additional avenue for Kingston to support tourism investments, especially those that find it more challenging to find funds through traditional investment sources (e.g., creative industries, see **Initiative 4**, or for some products and experiences, see **Initiatives 9, 10, 11, and 12**).

Tactical actions

- // Study potential for expanding tourism levy beyond hotels.
- // Study potential to support creation of a Kingston restaurant and/or attractions associations (like Kingston Accommodation Partners) to support tourism levy expansion and other advocacy.
- // Ensure alignment of Kingston tourism stakeholders with tourism levy expansion study recommendations.
- // Mobilize tourism stakeholders to support voluntary tourism levy expansion study recommendations.
- // Build community awareness through communication and transparency of Kingston's tourism levy to assist in broader community support for an expansion.

Timeframe/Trigger

- // Medium-term (6-12 months)

Roles

- // Tourism Kingston (co-lead)
- // Kingston Accommodation Partners (co-lead)
- // Chamber of Commerce (co-lead)

Outcomes

- // Understanding impact of voluntary tourism levy
- // Improve potential for funding more capital-intensive tourism projects

Pillar 1 initiatives: social enterprise culture (continued)

Initiative 6: Develop and communicate a tourism investment attraction plan

Description/Rationale

- // There is no shortage of tourism opportunities, entrepreneurial, driven individuals, or private (and some public) funding available to support development and enhancement of tourism products and experiences across Kingston.
- // The challenge is to continue creating an inclusive environment that enables the connection of new and/or existing opportunities with entrepreneurs and investors to innovate and build products and experiences for Kingston communities and visitors to enjoy.
- // Tourism Kingston should work with its partners to develop a stronger tourism investment environment by identifying barriers to attracting tourism investment (e.g., in family attractions and accommodations) and developing a strategy – in alignment with the triple bottom line approach, to attract investors to connect them with opportunities.

Tactical actions

- // Create an investment attraction plan to entice potential investors to fund Kingston's tourism opportunities (with detail for each potential asset).
- // Explore opportunities to foster more innovation and entrepreneurship across the region in partnership with local innovation and entrepreneurial centres.
- // Create a digital plan that outlines how to invest and why to invest in Kingston.

Timeframe/Trigger

- // Medium-term (6-12 months)
- // Ongoing

Roles

- // Tourism Kingston (co-lead)
- // Kingston Economic Development Corporation (co-lead)
- // Regional Tourism Organization 9 (support)
- // Kingston Accommodation Partners (support)
- // Ontario Ministry of Heritage, Sport, Tourism & Culture Industries (support)
- // City of Kingston (support)

Outcomes

- // Development of an investor attraction plan
- // Increased number of tourism businesses
- // Increased investment in tourism businesses
- // Increased tourism revenues

Pillar 1 initiatives: social enterprise culture (continued)

Initiative 7: Expand adoption of Kingston's brand

Description/Rationale

- // Kingston needs a single voice when speaking with prospective visitors, investors, sports tourism delegates, meeting attendees, etc.
- // Kingston's visitor economy brand has done an exceptional job of communicating, in a single voice, Kingston's strong value proposition. Recently, KEDCO has also taken on the brand and as the City supports this single voice, more organizations will need to support its singular message.
- // The visitor economy brand efforts are effective as an attractor to Kingston however, in many instances, the experiences when arriving to Kingston are not consistent with the brand promise. More effort needs to be considered for all of Kingston's tourism businesses support bringing the brand to life in the delivery of those experiences so that the vibe that emanates from the brand can continue even more strongly in the minds of visitors, as well as the community.

Tactical actions

- // Continue to activate the brand and engage partners and key stakeholders on the importance of consistency across all key touch points; explore partnership dollars to support Kingston's brand if expected to play bigger roles.
- // Develop a "how to activate" Kingston's tourism brand guide for tourism businesses.
- // Apply the Kingston brand to creative industries.
- // Apply the Kingston brand to DBIA.

Timeframe/Trigger

- // Medium-term (6-12 months)
- // Ongoing

Roles

- // Tourism Kingston (lead)
- // Tourism operators (support)
- // Downtown Kingston BIA (support)
- // Kingston Economic Development Corporation (support)
- // City of Kingston (support)
- // Kingston Accommodation Partners (support)

Outcomes

- // Visitors and investors receive consistent messaging about Kingston

Pillar 2 initiatives: tourism experience

Initiative 8: Address immediate labour bottlenecks

Description/Rationale

- // Every destination in Canada and around the world is facing a labour bottleneck, which poses an immediate threat to recovering tourism revenues.
- // For Kingston, this bottleneck consists of a lack of trained labour to support operator operations, potentially leading to continued closures and reduction in quality offerings – especially for the upcoming tourism seasons.
- // Bottlenecks are cumbersome for any one organization to manage. While we do not recommend that the partners spearhead a committee to better understand and resolve this bottleneck, it should seek to initiate collaboration and ensure a seat at the table, through a cross-sectorial committee to address the topic as quickly as possible in order to avoid potential loss of tourism revenues in 2022 and beyond.
- // Kingston's affordable housing plan by the City is supported by TK: a dependable housing supply supports a stable workforce.

Tactical actions

- // Identify existing committees focused on addressing labour bottlenecks and explore ways to increase collaboration and plans for implementation of possible management strategies (e.g., reference Queen's University Qualitative Research Report). If no committee exists, Kingston Accommodation Partners should seek to create a Kingston tourism labour committee to address immediate sector specific labour bottlenecks.
- // In alignment with Kingston Accommodation Partners' business plan, communicate with key tourism stakeholders the role taken on labour committee and initiatives being undertaken to support labour bottlenecks, as well as regular status updates to ensure awareness and encourage leveraging of opportunities.
- // Continue to prioritize multilingual representation in Kingston Accommodation Partners recruitment strategy which further supports **pillar 16** (provincial tourism) and **pillar 17** (new Canadians).

Timeframe/Trigger

- // Short-term (1-6 months)

Roles

- // Kingston Accommodation Partners (lead)
- // Tourism Kingston (support)
- // Regional Tourism Organization 9 (support)
- // Tourism Industry Association of Ontario (support)
- // Tourism Industry Association of Canada (support)
- // Tourism HR organizations (support)
- // Ontario Tourism Education Corporation (support)
- // Queen's University (support)
- // St. Lawrence College (support)

Outcomes

- // Detailed tourism labour strategy and plan to address immediate labour bottlenecks
- // Increased tourism labour participation in 2022 and beyond

Pillar 2 initiatives: tourism experience (continued)

Initiative 9: Support creation of flexible packages and itineraries

Description/Rationale

- // Over the last few years, primarily due to the pandemic, Kingston has taken a step back on developing additional packages and experiences. There is a general feeling that now is the time to reconsider this opportunity, leveraging the insights learned about the type of experiences consumers are seeking, to allow for increased flexibility for consumers to be easily determine their desired experiences.
- // There is an opportunity for Tourism Kingston and its partners to fill the void based on market research collected in **Initiative 3**, to create a host of packages, itineraries, and experience options for various target market segments.
- // Together with tourism stakeholders across the city, Tourism Kingston should aim to create diverse, inclusive, sustainable, and highly sought-after premium packages and itineraries, across the seasons.
- // Key package and itinerary areas should focus on Kingston's priorities of high-yield tourism products and experiences that entail culinary, creative industries, festivals and events, including sporting events, waterfront/on-the-water animation, etc.
- // Finally, it is important to note that creating packages and itineraries does not mean creating "deals". Rather, this initiative focuses on putting together concepts for 1, 2, 3, and 5-day packages and itineraries to make it easier for consumers to understand what their Kingston tourism experience could entail.

Tactical actions

- // Hire a full-time tourism development specialist as part of Kingston Accommodation Partners to support development and implementation of the product development strategy/plan.
- // Explore, create, and communicate cross-regional packages, itineraries, and experience options linked to findings from **Initiative 3** and identified target markets (see **Initiatives 15, 16, and 17**).
- // Work with various partners, such as travel trade (see Initiative 18), to promote Kingston tourism packages, itineraries, and experience options.

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing

Roles

- // Kingston Accommodation Partners (co-lead)
- // Tourism Kingston (co-lead)
- // Regional Tourism Organization 9 (support)
- // Public and private sector organizations (support)
- // Indigenous tourism stakeholders (support)

Outcomes

- // Increased number of high-yield packages and itineraries
- // Increased awareness and tourism revenues generated from packages and itineraries

Pillar 2 initiatives: tourism experience (continued)

Initiative 10: Develop/enhance enticing shoulder and winter tourism products

Description/Rationale

- // With market research collected in **Initiative 3**, operators can better understand the opportunities they have to amplify product, experiences, and packages for the shoulder and winter seasons – or to develop new products and experiences altogether.
- // This initiative focuses on working with operators, or groups of operators, across Kingston to enhance or develop enticing shoulder and winter tourism products, experiences, and packages that stimulate demand.
- // Development of shoulder and winter products, experiences, and packaging may include generating monthly themes during times of need (e.g., Christmas, Valentine’s Day), involvement of rural communities and players beyond tourism like artists, culinary specialists, and other non-tourism businesses, and development of incentives to entice the creation of new events and festivals. Product and experience enhancements or new opportunity examples include:
 - A Christmas dinner, market, or holiday lights experience involving Kingston Penitentiary or Rockwood Asylum
 - A week-long spring sailing event and festival
 - An arts- and music-themed event around the Kingston Canadian Film Festival
- // This initiative further supports the Rural Economic Development Strategy “Revitalize Rural Tourism”.

Tactical actions

- // Conduct inventory analysis of shoulder- and winter-tourism products and experiences.
- // Work with operators to explore, create, and communicate shoulder and winter concepts and experience options linked to findings from **Initiative 3** and identified target markets (see **Initiatives 15, 16, and 17**).
- // Seek funding to support development of shoulder and winter products, including working with the City of Kingston to invest in shoulder and winter opportunities (e.g., outdoor skating rinks, family snow fun areas, etc.).

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing

Roles

- // Tourism Kingston (lead)
- // Kingston Association of Museums (support)
- // Regional Tourism Organization 9 (support)
- // Public and private sector organizations (support)
- // City of Kingston (support)
- // Downtown Kingston (support)
- // Indigenous tourism stakeholders (support)

Outcomes

- // Increased number of shoulder and winter products and experiences
- // Increased number of shoulder and winter packages and itineraries
- // Increased awareness and tourism revenues generated in shoulder and winter seasons

Pillar 2 initiatives: tourism experience (continued)

Initiative 11: Enhance culinary tourism in Kingston

Description/Rationale

- // As culinary and agri-tourism continue to trend, Kingston is well-positioned to continue being a major regional (and potentially national) culinary and agri-tourism destination.
- // In alignment with the Growing Food Tourism in Kingston Strategy, and with market research collected in **Initiative 3**, culinary and agri-tourism players should seek to uncover opportunities to develop and promote Kingston’s culinary and agri-tourism scene and amplify it further through experience and package development.
- // This initiative recommends Kingston’s culinary and agri-tourism stakeholders come together to create a culinary tourism association (or restaurant association) to develop a cohesive and collaborative culinary and agri-tourism development and marketing plan. Product and experience enhancements or new opportunity examples include:
 - Development of a winter/spring-themed culinary festival potentially focusing on something uniquely Kingston
 - More “Kingstonlicious” type of events or restaurant weeks
 - Itineraries and packages developed around Kingston’s culinary and agri-tourism stars

Tactical actions

- // Conduct inventory analysis of culinary and agri-tourism products and experiences.
- // Create a Kingston restaurant association (see **Initiative 5**) and include more partners able to support culinary and agri-tourism in Kingston.
- // Continue to implement the Growing Food Tourism in Kingston strategy.

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing

Roles

- // Kingston Accommodation Partners (co-lead)
- // Tourism Kingston (co-lead)
- // Public and private sector organizations (support)
- // City of Kingston (support)
- // Downtown Kingston BIA (support)
- // Kingston Chamber of Commerce (support)
- // Indigenous tourism stakeholders (support)
- // Rural Strategy Office (support)
- // Restaurant Association (support)

Outcomes

- // Increased number of culinary and agri-tourism products, experiences, packages, and itineraries
- // Increased revenues from visitors and residents experiencing Kingston culinary/agri-tourism products and experiences

Pillar 2 initiatives: tourism experience (continued)

Initiative 12: Identify tourism “districts” in Kingston

Description/Rationale

- // The City of Kingston encompasses a large geography, and the core downtown area of Kingston holds many of its tourism amenities, attractions, restaurants, and accommodations. It is also home to a concentration of historic buildings, squares, and waterfront amenities.
- // Branding places like Kingston’s downtown as the “heritage and arts district” can better define Kingston’s core tourism amenities to achieve stronger competitive advantage. Think “French Quarter” in New Orleans, the “Meatpacking District” in Manhattan, the “Distillery District” in Toronto. All have tourism brands that draw visitors because they evoke something interesting to the prospective visitor.
- // While the example above focuses on “heritage”, consideration should be given to whose heritage and what role Indigenous communities could play. Other “districts” or neighbourhoods should be evaluated as well, such as Portsmouth Village, Inner Harbour, etc.

Tactical actions

- // Develop partnerships with key stakeholders such as Downtown Kingston, City of Kingston, and others to activate exploration of creation of Kingston “districts”.
- // Determine parameters of this initiative such as name, marketing name/position, story, signage (downtown and on major routes/walking tours), communications, marketing materials, how to engage partners, etc.
- // Identify the outcome of the tourism districts (e.g. Increased visitation and community spend).

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing

Roles

- // Tourism Kingston (co-lead)
- // Downtown Kingston BIA (co-lead)
- // City of Kingston, Heritage Services (support)
- // Kingston Association of Museums (support)
- // Public and private sector organizations (support)

Outcomes

- // Kingston distinguishes itself as a place of culture and heritage, as well as other types of “districts” or neighbourhoods
- // Creation of sub-brands that add context and tells Kingston’s stories

Pillar 2 initiatives: tourism experience (continued)

Initiative 13: Create a sustainable tourism development plan

Description/Rationale

- // In line with its triple bottom line approach to tourism, Kingston has a duty to develop the type of tourism that is reflective of its responsibility towards environmental, social, and economic outcomes.
- // While the topic of regenerative and sustainable tourism was brought up often, there was a lack of uniform understanding of what the terms meant for tourism in Kingston, and more importantly, what tourism stakeholders – from DMOs to operators, entrepreneurs, and other public and private sector organizations – should do about it.
- // Tourism Kingston should develop a common understanding and vision for sustainable tourism and develop a plan as well as training and educational material for various stakeholders to ensure a minimum standard understanding of the topic along with specific actions that each can, and perhaps should, take to ensure the tourism industry is marching in lock-step towards a sustainable tourism future.

Tactical actions

- // Work with experts to define sustainable tourism for Kingston, along with specific actions that each stakeholder can take to align with the region's sustainability vision.
- // Develop an understanding of what Tourism Kingston is doing with regards to its sustainable tourism efforts to determine ways to support themes through programming, marketing, and communications.
- // Create and execute a sustainable tourism training and education plan.
- // Develop training and educational materials per the plan and provide online access to relevant tourism stakeholders.

Timeframe/Trigger

- // Long-term (12+ months)

Roles

- // Tourism Kingston (lead)
- // Greenstep (co-lead)
- // Kingston Accommodation Partners (support)
- // City of Kingston (support)
- // Sustainable Kingston (support)

Outcomes

- // Detailed sustainable tourism strategy, training, and education plan
- // Increased number of sustainable tourism operators
- // Improved perception of Kingston as a sustainable tourism destination

Pillar 2 initiatives: tourism experience (continued)

Initiative 14: Leverage under-utilized assets for tourism

Description/Rationale

- // Kingston is blessed with unique assets that have significant historic and contemporary value. However, many of these assets, while not under the direct oversight of the City of Kingston, are underutilized and not optimized to reach their full tourism potential. These assets include the Penitentiary, Rockwood Asylum buildings, theatres which operate only during part of the year, etc.
- // It is recognized that development of important relationships are required to support the utilization of these assets, as well as advocacy from local government, MPs and MPPs with respect to assets that are under provincial and federal jurisdictions.
- // While the IDS recognizes that there are likely more immediate opportunities, optimization of these underutilized assets could help to drive visitation and revenues in support of Kingston's objectives to grow tourism.

Tactical actions

- // Develop an inventory of potentially underutilized assets for short, medium, and long-term consideration.
- // Map key influencers, decision makers, and stakeholders to those assets. Learn about challenges and opportunities. Present options for consideration including potential investment (see **Initiative 6**).
- // Develop "activation" plan for consideration and approval.

Timeframe/Trigger

- // Long-term (12+ months)

Roles

- // Tourism Kingston (lead)
- // City of Kingston (support)
- // Kingston Accommodation Partners (support)
- // St. Lawrence Parks Commission (support)
- // Kingston Association of Museums, Art Galleries and Historic Sites (support)
- // Provincial and Federal Government (support)

Outcomes

- // More assets to support tourism revenue generation
- // More assets for enjoyment of Kingston community
- // More pride in key assets for the city and community

Pillar 3 initiatives: tourism revenues

Initiative 15: Create targeted, flexible campaigns in Ontario

Description/Rationale

- // With an initial focus on demand beyond just summer season, to increase tourism revenues for local communities and tourism operators, Tourism Kingston should focus on immediate low-hanging fruit opportunities to drive visitation and revenues.
- // As it develops more products and experiences to entice visitors, it should continue to build connections with potential visitors among its most attentive audience: Ontarians.
- // Despite many travellers choosing destinations worthy of “revenge tourism”, or making up for lost time, by going further away and for longer periods of time, global evidence suggests there are still many travellers who have been psychologically and/or financially impacted by the COVID-19 pandemic and will be looking closer to home for getaways.
- // Additional research (see Initiative 3) will be required to get a better understanding of Ontarian consumer behaviours, desires, and aspirations, which have no doubt shifted due to the pandemic, to ensure that campaigns are relevant and strike at the right point of the visitor’s path-to-visit.
- // Finally, because of the unknown nature of the pandemic and other global conflicts the world is experiencing, destination marketing is trending towards smaller more flexible campaigns to enable the quick adaptation to changing environments and meeting potential travellers where they are.

Tactical actions

- // Incorporate smaller, flexible campaigns targeting Ontarians into the marketing plan, backed by evidence collected in Initiative 3; these may be theme-based such as around holidays and two- or three-day getaways.
- // Execute all marketing campaigns.

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing

Roles

- // Tourism Kingston (lead)
- // RTO9 (support)
- // Destination Ontario (support)

Outcomes

- // Detailed tourism marketing plan
- // Implementation of marketing campaigns targeting Ontarians
- // Increased tourism revenue generated by Ontarians

Pillar 3 initiatives: tourism revenues (continued)

Initiative 16: Create flexible campaigns targeting key provincial markets

Description/Rationale

- // In the same vein as **Initiative 15**, this initiative focuses on immediate opportunities to welcome travellers from other key Canadian markets such as from Québec (e.g., Montreal and Québec City), Alberta (e.g., Calgary), and British Columbia (e.g., Vancouver).
- // In alignment with airport services that begin in the fall of 2022, and markets where flights would be coming from and with data collected in **Initiative 3**, develop understanding of these target markets, which traditionally include travellers eager to explore new destinations, develop packages and itineraries (see **Initiative 9**), and work with travel trade (see **Initiative 18**), and implement small and nimble marketing campaigns to entice them to visit.
- // Additional research is required to gain a strong understanding of specific target market behaviours, desires, and aspirations to ensure appropriate messaging reaches them at their current point in their path-to-visit, and through the right channels, should it be determined that more emphasis be placed in Québec markets.

Tactical actions

- // Incorporate smaller, more flexible campaigns targeting QC, AB, and BC travellers into the marketing plan, backed by evidence collected in Initiative 3. These may be holiday or theme-based such as around Christmas and two- or three-day getaways.
- // Execute all marketing campaigns.
- // Recruit bilingual (English/French) tourism sector employees to provide service for provincial markets.
- // Utilize the airport flight reach to target these destinations .

Timeframe/Trigger

- // Long-term (12+ months)
- // Ongoing

Roles

- // Tourism Kingston (lead)
- // City of Kingston (support)
- // Destination Ontario (support)
- // Destination Canada (support)
- // RTO9 (support)

Outcomes

- // Detailed tourism marketing plan
- // Implementation of marketing campaigns targeting QC, AB, and BC travellers
- // Increased tourism revenue generated by QC, AB, and BC travellers

Pillar 3 initiatives: tourism revenues (continued)

Initiative 17: Create flexible campaigns targeting new markets

Description/Rationale

- // There are opportunities to further differentiate Kingston and attract a wider audience to visit.
- // Digital channels are making it easier and more cost-effective to target very specific prospective travellers with specific messages that appeal directly to them.
- // New markets could include new Canadians, LGBTQ+, niche markets/communities of interest, or those markets with a propensity to engage in culture and heritage.
- // These markets could be targeted for specific campaigns and programs supporting specific time periods (LGBTQ+ pride parades/festival week), New Canadians Celebration Week, religious holidays such as Eid for the Muslim community, etc.

Tactical actions

- // Undertake or commission market research to determine best market segment prospects for Kingston by geography, size of market, characteristics, drivers of destination choice, media, etc.
- // Consider developing segment specific programming and events to support visitation.
- // Leverage Rainbow Registered program.

Timeframe/Trigger

- // Short-term (1-6 months)
- // Ongoing

Roles

- // Tourism Kingston (lead)
- // Kingston Accommodation Partners (support)
- // City of Kingston, Equity, Diversity and Inclusion (support)
- // RTO9 (support)
- // Destination Ontario (support)
- // Destination Canada (support)

Outcomes

- // Developed market segment specific reasons to visit accompanied by marketing campaigns that drive visitation during challenging periods of the year/week to increase tourism revenue
- // Diversification of Kingston's source markets

Pillar 3 initiatives: tourism revenues (continued)

Initiative 18: Support multi-channel visitor services program with focus on operators

Description/Rationale

- // Travel agents, OTAs, Tripadvisor, etc., are relevant across the consumer planning and booking journey – from awareness, to engagement, and conversion.
- // Many Kingston operators are not leveraging these channels to their maximum benefit. Tourism Kingston can help to educate and nurture a multi-channel approach (Google is the primary channel to optimize as it is the starting point for most trip planning). Niche tour operators may provide immediate opportunities for promotion of Kingston experiences.
- // This initiative may also include exploration of air and rail channel expansion to encourage different types of travellers in tandem with VIA Rail and the Kingston Airport.

Tactical actions

- // Identify potential trade partners by niche, reach, and audiences to leverage insights from **Initiative 3**. Prioritize travel trade itineraries, pulling together a travel trade plan and execute.
- // Share itineraries and routes with travel trade partners in advance of going live to help identify what might be missing, what might be needed, to adjust and refine, as needed.
- // Build a trade-ready plan for operators working on delivery of education and training as needed.

Timeframe/Trigger

- // Medium-term (6-12 months)
- // Ongoing

Roles

- // Tourism Kingston (lead)
- // City of Kingston, Communications & Customer Experience (support)
- // Kingston Association of Museums (support)
- // Kingston Airport (support)
- // VIA Rail (support)
- // Regional Tourism Organization 9 (support)
- // Destination Ontario (support)

Outcomes

- // Increased tourism revenues through travel trade
- // Increased tourism revenues during shoulder/winter season
- // Increased awareness of Kingston as a destination

Pillar 4 initiatives: long-term developmental wins

Initiative 19: Launch conference centre development

Description/Rationale

- // Many destinations have addressed revenue, yield, and seasonality challenges through encouragement of discretionary MICE business travel. Kingston has amenities that meeting planners favour such as a strong leisure destination, restaurants, hotels, and other amenities, however, lacks a single contiguous conference facility for medium-sized conventions. Currently Kingston is turning away meeting opportunities, and thus revenues, due to venue restrictions.
- // Trends in post-pandemic meetings include smaller remote teams (e.g., a company's accounting team) meeting together at an inspiring location creating a new demand and rationale for medium-sized meeting facilities.
- // For many meeting delegates, this may be their first trip to Kingston and that experience can entice them to return for a leisure visit, with family and friends, or even consider investing in, or moving to, the city.
- // Conventions and meetings marketing can focus on priority industries for Kingston, including the creative industries, to further support awareness and appreciation for Kingston's economic opportunities – while at the same time, providing Kingston's residents with an additional venue for local exhibitions and events.
- // Kingston commissioned a study to determine the feasibility of a convention facility, however funding for the facility has not been determined. Outlined in the City of Kingston Strategic Plan it is critical to advocate to both provincial and federal government to support this project.
- // This initiative should consider developing a neutral (not owned by any one institution) mixed-use convention facility – supported by an art gallery, Indigenous museum, or family-friendly attraction; and could also support local not-for-profits with space at reduced rates.

Tactical actions

- // Develop a communications plan to communicate the business case for a facility with a newly formed City Council in the fall of 2022.
- // Develop a public-private plan to develop the facility with federal, provincial, local government and private sector investment.
- // Consideration should be given to KAP and TK allocating funding for development of the infrastructure (see Tourism Vancouver long-term plan to fund the Vancouver Convention Centre alongside other public funds), in addition to private sector funding sources.

Timeframe/Trigger

- // Long-term (12+ months)

Roles

- // Tourism Kingston (co-lead)
- // Kingston Accommodation Partners (co-lead)
- // City of Kingston (co-lead)
- // Conference Centre Working Group (co-lead)
- // Government of Ontario (support)
- // Government of Canada (support)
- // Kingston Economic Development Corporation (support)

Outcomes

- // A multi-purpose convention, meeting and event centre in downtown Kingston that can increase visitation and vibrancy to the city year round, and significantly increase tourism revenue/visitation

Pillar 4 initiatives: long-term developmental wins (continued)

Initiative 20: Create and animate downtown pedestrian-only zones

Description/Rationale

- // With the opening of the new Waaban Crossing, Kingston has an opportunity to significantly reduce drive-through and commuter vehicle congestion in the waterfront and downtown areas. Pedestrian-only zones have thrived in cities and regions across Europe, offering a place to stroll, shop, engage with others, eat and experience the cultural delights of the city without the noise and congestion of vehicle traffic.
- // This opens the opportunity to feed into pedestrian-only zones in the downtown core without impacting commuter traffic. As there are few pedestrian-only areas in competitor markets, this could provide Kingston with another unique differentiator to further complement its brand. This is also highlighted in the City of Kingston Strategic Plan to improve walkability.
- // It is important to note however, that for those pedestrian zones to thrive, they must be activated. There must be a plan to create and animate the zones while considering issues such as adequate parking nearby so residents/visitors can participate.

Tactical actions

- // Develop a pedestrian zone plan for the city (by season, day of week, time of day, etc.), including completing environmental assessment of downtown and activation of both temporary (e.g., Princess Street Promenade closures in the summer) as well as potential permanent street closures starting in 2023.
- // Support the creation of a Pedestrian Zones Working Group or specific governing body to be accountable and responsible to oversee development and implementation of an activation/animation plan for pedestrian areas (e.g., support booking, budgeting, maintaining, etc.), particularly in and around Springer Market Square.

Timeframe/Trigger

- // Medium-term (6-12 months)
- // Ongoing

Roles

- // City of Kingston (lead)
- // Tourism Kingston (support)
- // Downtown Kingston BIA (support)
- // Chamber of Commerce (support)
- // Kingston Accommodation Partners (support)

Outcomes

- // A more vibrant and walkable downtown that thrives with visitors and residents
- // Improved reputation as visitors consider Kingston for a vacation or meeting because of its thriving downtown core

Pillar 4 initiatives: long-term developmental wins (continued)

Initiative 21: Improve relationship with Queen's University

Description/Rationale

- // For both institutions of higher learning and their host cities, there is a need for strong collaboration to support and fuel joint success.
- // Factors in successful university recruitment include not only academic programs and teaching staff, but also the amenities and vibrancy of the university's host city.
- // During stakeholder engagement to inform the IDS, the relationship between Queen's University and Kingston was often described as an "us versus them" mentality.
- // This initiative recommends effort be placed to create a meaningful and strategic partnership between Queen's University, the City of Kingston, and key players that support promotion and development of Kingston for both residents and visitors.

Tactical actions

- // Create committee to explore potential areas of partnership between Queen's University and the partners.
- // Create and implement a collaboration plan starting with identifying simple, initial activities that might serve the purposes of Queen's University, as well as the City of Kingston.
- // Reference to the Queen's plan developed by KAP and TK in 2019.
- // Leverage meetings, sport, travel trade itineraries, and other opportunities.

Timeframe/Trigger

- // Long-term (12+ months)

Roles

- // City of Kingston (co-lead)
- // Queen's University (co-lead)
- // Kingston Accommodation Partners (co-lead)
- // Tourism Kingston (co-lead)
- // Kingston Economic Development Corporation (support)

Outcomes

- // Increased student/faculty interest in Queen's University
- // Increased interest in working and living in Kingston post-graduation (workforce retention)

Pillar 4 initiatives: long-term developmental wins (continued)

Initiative 22: Support access to public amenities

Description/Rationale

- // Tourism stakeholders from across the city cited the need for tourism to support development of public amenities such as public washrooms, parking, Wi-Fi, elective vehicle charging stations, and others to enhance the visitor experience.
- // This initiative focuses on collecting data on existing and upcoming tourism infrastructure and public amenities throughout the city, mapping and identifying areas where there may be potential gaps. It also includes identifying potential partners to work with to implement identified opportunities.

Tactical actions

- // Work with the public sector to identify a list of public amenity projects and create prioritization assessment to determine those most likely to have greater returns in alignment with the triple bottom line approach.
- // Work with partners to support development of the business case for identified public amenity investments, advocate for, and implement infrastructure projects.
- // Working with partners, explore opportunities to improve and increase washrooms and charging stations around the Visitor Information Centre (i.e., public use of washrooms in exchange for cleaning and maintenance support).

Timeframe/Trigger

- // Long-term (12+ months)

Roles

- // Relevant public sector authority (co-lead)
- // Tourism Kingston (co-lead)
- // Kingston Accommodation Partners (co-lead)

Outcomes

- // Increased partnership to support provision of public amenities
- // Increased public amenities to support tourism and the community across Kingston
- // Increased satisfaction with visitor experience
- // Increased revenues from longer stays and return visits

Pillar 4 initiatives: long-term developmental wins (continued)

Initiative 23: Activate and access the waterfront

Description/Rationale

- // Kingston has an impressive waterfront with enormous potential. New investments in the waterfront (e.g., Gord Edgar Downie Pier) and some amenity improvements have been made, however there is room to expand the number of opportunities for visitors to “get on the water.” This could include more activation in Confederation Park or Confederation Basin Promenade by introducing something like a “Le Café Du Monde” (<https://www.lecafedumonde.com>) or kayak and paddleboard rentals, weekend and vacation sailing camps, boat rentals or even carving out more docking facilities for overnight boat visitors (e.g., the Waaban crossing itself presents opportunity to function as an attraction/pedestrian zone).
- // Challenges with activation could include issues with implementation, land availability, accessibility, and the possible challenges with environmental impact. In some instances, in downtown Kingston, waterfront lots are reserved for parking which is unlikely their best and highest return use – recognizing that these lots may be privately owned and reserve when zoning approval may be more favourable to alternate uses.
- // Any activation opportunities would need to support and benefit both visitors and residents and the integration of non-motorized watercraft.

Tactical actions

- // Develop inventory of assets on the waterfront that could support key tourism initiatives and consider those that may be ripe for development.
- // Determine gaps in water-based and waterfront experiences and assets that could support tourism and the community better (e.g., Confederation Harbour as an area that can safely be used for both personal and motorized watercraft).
- // Develop long-term recommendations to key stakeholders and owners of these assets to transition to best alternate uses in support of Kingston’s visitor economy.
- // Focus on the harbour between Delta Hotel and Residence Inn to be an activation point.

Timeframe/Trigger

- // Long-term (12+ months)

Roles

- // Tourism Kingston (co-lead)
- // City of Kingston (co-lead)
- // Kingston Accommodation Partners (support)
- // Regional Tourism Organization 9 (support)
- // Relevant public or private sector authority (support)

Outcomes

- // Optimized activities from cruise ships, yachts, kayak and canoe rentals, and sailing programs to support development of higher revenue for tourism

Pillar 4 initiatives: long-term developmental wins (continued)

Initiative 24: Establish partnership to develop a deep-water dock

Description/Rationale

- // In addition to activating the waterfront as described in **Initiative 23**, Kingston has an opportunity to support a Great Lakes cruise strategy.
- // It is envisioned that a Great Lakes cruise strategy would include a deep-water dock to accommodate larger cruise ships that might choose Kingston as a place for a potential overnight stay. There is also an opportunity to be included in the Great Lakes Cruise Association development of the upper St. Lawrence River strategy between Cornwall and PEC. This is being done in partnership with RTO9 – embracing every community between these destinations.
- // Like **Initiative 23**, challenges with activation include challenges with implementation, land availability, and accessibility, as well as possible challenges with environmental impact.

Tactical actions

- // In partnership with stakeholders, revise the study for a deep-water dock in Kingston and update recommendations to key stakeholders for approval.
- // Work with RTO9 and the Great Lakes Cruise Association to encourage inclusion in cruise strategies and explore opportunities to develop Kingston as a major cruise destination.
- // Act upon recommendations from study review to develop a deep-water dock to support larger cruise operators.

Timeframe/Trigger

- // Long-term (12+ months)

Roles

- // Tourism Kingston (co-lead)
- // City of Kingston (co-lead)
- // Regional Tourism Organization 9 (support)
- // Great Lakes Cruise Association (support)
- // Kingston Economic Development Cooperation (support)
- // St. Lawrence Parks Commission (support)
- // Provincial and Federal Government (support)

Outcomes

- // Development of a deep-water dock to support larger cruise operators to increase tourism visitation and expenditures

Pillar 4 initiatives: long-term developmental wins (continued)

Initiative 25: Implement a sport and wellness tourism strategy

Description/Rationale

// As in every municipality, recreation facilities are costly to build and maintain, however they are key assets from a community and tourism perspective.

Timeframe/Trigger

// Long-term (12+ months)

Roles

- // Tourism Kingston (co-lead)
- // City of Kingston (co-lead)
- // Kingston Accommodation Partners (co-lead)
- // Neighboring Municipalities (support)
- // Recreation & leisure partners (support)

Tactical actions

- // Support the revitalization and clustering of sporting facilities (e.g., hockey, swimming, etc.) across Kingston and in neighbouring municipalities to achieve an increase in tournaments and sporting events, ultimately increasing visitation and revenues – particularly during shoulder and winter months.
- // Partner with the City of Kingston and other community partners to complete a sport tourism venue inventory assessment led by Tourism Kingston and supported by the City of Kingston and Kingston Accommodation Partners to identify infrastructure gaps required to support residence, increase tournaments, and attract key sporting events to ultimately increase visitation and revenues.

Outcomes

- // The development and redevelopment of sport facilities in Kingston and surrounding municipalities achieves an increase in tournaments and sporting events

SOURCE

APPENDIX A

Tourism in Kingston situational analysis (Global, domestic, & local trends)

- // City of Kingston Strategic Plan
- // Dentons, Deloitte, Santander, Reuters
- // Destination Canada; To what extent do you agree or disagree with the following statements?
- // Integrated Economic Development Strategy
- // Observer Research Foundation, The Guardian, EY
- // Product Development Research Report
- // RTO9
- // Tourism Kingston
- // Twenty 31, December 2021, February 2021, Quantitative survey of Canadian travel consumers, August, 2021
- // Vectorstock.com

GLOBAL PERFORMANCE TRENDS ASSESSMENT

The world is at a crossroads geopolitically and technologically – providing both potential risk and opportunity.

Political	Economic	Social	Technological	Environmental	Regulatory
<p>// Divisions over lockdown measures have led to an unusually high level of political polarization in the West.</p> <p>// China came under increasing scrutiny over the COVID-19 pandemic as well as human rights abuses, though continues to be highly influential globally.</p> <p>// Tensions also grew between East and West, encompassing NATO allies' relations with both China and Russia, with respect to the conflict in Ukraine.</p> <p>// The EU is looking to reassert its role both politically and economically with plans for a 'Green COVID-19 recovery'.</p>	<p>// There has been an inevitable economic downturn as a result of COVID-19 causing inflation and predictions of recessions.</p> <p>// There were steep declines in global trade and financial flows to developing countries.</p> <p>// The global tourism industry has undergone an almost complete halt, with tentative recovery initiating now but with a long road ahead to return to pre-pandemic levels of economic health.</p> <p>// The impact of Omicron variant put economic recovery again on hold, with expectations for it to resume on the second half of 2022.</p> <p>// Inflation and supply chain issues are impacting all major markets.</p>	<p>// COVID-19 has precipitated worldwide social isolation, with increasing rates of mental health issues affecting particularly young people.</p> <p>// Following incidents of racial violence in the USA, there has been a widespread increase in racial tensions and rise of racial justice movements.</p> <p>// Amplified inequalities, including in gender and digital accessibility, also came to the fore during the COVID-19 crisis.</p> <p>// Migrations out of major cities has taken place, particularly in developed countries like Canada and the US.</p>	<p>// Blockchain and cryptocurrency is experiencing a resurgence, with the world looking for new ways to bank and secure finances.</p> <p>// Artificial Intelligence, 5G wireless networks, and other digital technologies will form the backbone of the digital economy but also increase geopolitical competition.</p> <p>// The main political blocks, the US, EU and China are expected to compete for greater self-reliance, particularly in digital technologies.</p> <p>// Corporate and office-based companies have increasingly moved to remote-working .</p>	<p>// Climate change continued to disrupt ecosystems, with the early part of 2020 defined by wildfires in Australia, with ongoing wildfires and water shortages in major hubs such as California.</p> <p>// Environmental, Social, and Governance (ESG) fund flows defied pandemic panic in 2020.</p> <p>// Environmental factors came to the fore, as the EU began to finance part of its relief package through green bonds.</p> <p>// Ambitious climate policy agendas are likely (often as part of COVID-19 stimulus plans) as more countries announce carbon neutrality targets.</p>	<p>// Non-governmental forces largely failed to take a lead in the fight against the pandemic, leading some to suggest a greater role for the state in the post-pandemic world.</p> <p>// It is predicted that "vaccine nationalism", export controls, restrictions on cross-border people movement will create on-going risks in markets around the world.</p> <p>// Travel restrictions are starting to ease after a new wave of hard lockdowns amid Omicron, while the vaccine rollout continues at fast pace with the addition of boosters (3rd doses).</p>

Source: Observer Research Foundation, The Guardian, EY

2022 TOP 20 TRENDS SHAPING THE FUTURE OF TOURISM

Kingston has a strong competitive positioning to capitalize on many emerging trends.

Trend	Regenerative travel going local	Experiences are the new luxury	Single destination, longer stays	Remote work creates a new definition of tourism	Wellness for all
Description	Regenerative travel will support tourism as a key pillar for sustainable economic development for destinations. 83% of global travellers will make sustainable travel a priority in the future, while 66% want their travel spending to directly benefit local communities.	The value of travel and tourism will increase even more in 2022, boosting consumer spending towards unique travel experiences. The lack of travel caused by the COVID-19 pandemic has turned tourism into a scarce, luxury good.	The complexity of arranging a trip pre and post testing, differing vaccine passport protocols and the uncertainty of new COVID-19 waves will result in travellers booking fewer trips but increasing the length of their stay and in a single country – ‘Travel less, travel better’ will determine booking behaviour this year.	An emerging trend since COVID-19; remote work is here to stay. Last year proved that productivity and employee satisfaction increased, while business costs benefited from it as a result of giving the opportunity to temporarily relocate and work in more inspiring surroundings. It is forecasted that 50% of the global workforce will continue remote or hybrid work models during 2022.	The wellness and spa sector is expected to grow 17% annually through 2025, confirming the increasing appeal of wellness travel within the tourism industry, with up to 76% of travellers wanting to spend more on travel experiences that improve their wellbeing and mental health.
Key takeaway destination	Destinations betting on nature-based products and activities will take market share from urban destinations that fail to pivot, while giving tourism leadership to the local community will be a differentiator in the global market.	Too many destinations will be competing to attract fewer travellers in the first half of 2022, so designing robust tourism experience strategies will be key to optimize the share of visitors.	A unique opportunity to generate more revenue and disperse demand across the destination and contribute to the economic growth of multiple locations, as well as broadening the range of products and experiences to upsell.	Already launched the so-called ‘digital nomad visas’ – Portugal, Spain, Barbados, Costa Rica, Estonia – to capture demand of high-income travellers and workers seeking a much more immersive destination experience. Investment in reliable high-speed internet infrastructure will be key to succeed and opens the door to flatten seasonality.	Capitalizing on existing wellness assets and experiences, as well as designing and implementing marketing strategies to boost this segment should be a priority.

Source: Twenty31

2022 Top 20 trends shaping the future of tourism (continued)

Destinations that plan and strategize to leverage these trends are likely to increase market share.

Trend	Health & Safety is standard	Tourism labour becomes the bottleneck	Inspiration from streaming & social media	Business travel comeback	International travel will overtake domestic, finally
Description	70% of travellers say that respect for COVID-19 safety guidelines and restrictions is important when deciding on a travel brand, resulting on travellers now feeling safer when health-focused measures are in place in eating, shopping, and tourism locations.	Demand for labour in hospitality remains strong, but hospitality workers finding other careers due to COVID-19 industry disruption and demographic trends will drive a long-term worker shortage severely impacting service, availability of hotel rooms and other tourism experiences.	Watching Tik Tok and Instagram influencers create or push inspirational travel content is no longer a niche, while streaming services like Netflix and HBO provide new endless opportunities to create destination awareness – think Game of Thrones for Dubrovnik from 2010 and beyond to White Lotus for Hawaii in 2021.	Business travel is one of the most impacted tourism verticals, but will begin its recovery in 2022. It is unlikely that travelling for work-related purposes will come back to pre-COVID-19 levels, mainly due to changes in worker behaviour and demand, efficiency, technology and sustainability. However, physical meetings will become more important as 72% of business travellers are eager to travel.	Domestic holidays will still be important as travel restrictions remain in place at the beginning of 2022, but their appeal will wane in favour of pent up demand for international travel. Only 18% of travellers would prefer a domestic holiday, with international travel spending expected to rise a 94% in 2022.
Key takeaway destination	Continued consumer demand for high levels of health and safety require destinations to invest in order to build a key brand differentiator.	Improving childcare, managing health risks and rising wages are among the initiatives destinations could focus on, as well as upskilling the local tourism workforce and developing tourism education partnerships to engage future labour into tourism.	Targeted filming and production incentive programs, partnerships with streaming services and social media influencers will need a higher investment from destinations in order to build a strong brand, giving tools to local storytellers to showcase the destination's culture to the global stage.	While the quantity of face-to-face meetings may have reduced due to the pandemic, the value for them has increased, as globally people desire non-screen-based interactions. The growing trend to combine business travel with stay extensions for holiday purposes gives destinations a wider range of touchpoints to engage with this traveller segment.	It is time to dust off the strategy plans to capitalize on the international markets. However, the domestic market proved to have untapped potential during the pandemic and should not be underestimated moving forward.

Source: Twenty31

DOMESTIC PERFORMANCE TRENDS ASSESMENT

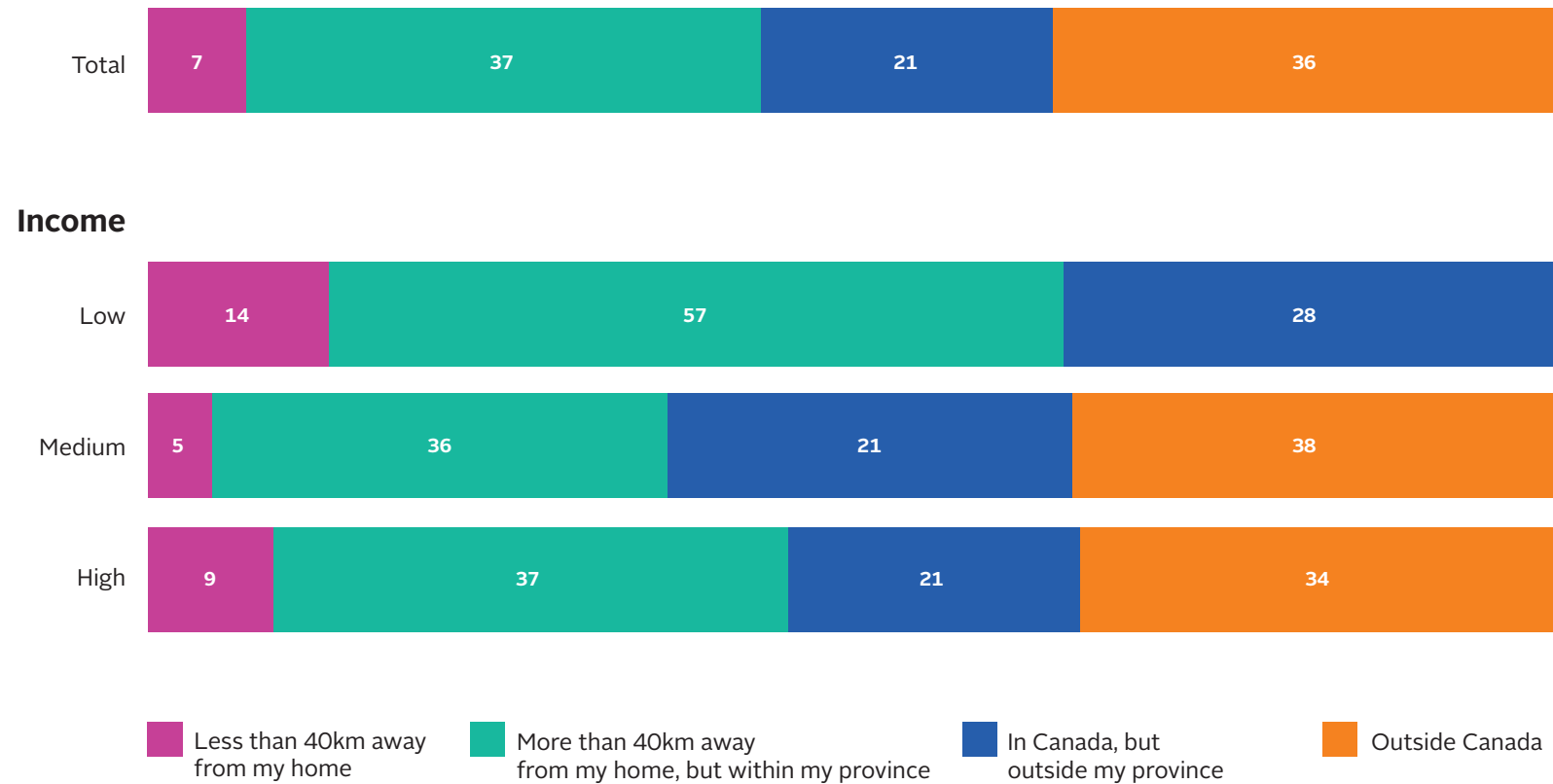
Canada faced seismic changes in the past two years but managed to maintain a relatively stable position.

Political	Economic	Social	Technological	Environmental	Regulatory
<p>// On the geopolitical stage, Canadians view the world as less friendly than they did previously – compared with 2013. Only half as many Canadians in 2020 see China as a friend; almost five times as many see that country as an enemy. Only three-in-five Canadians now view the US as a friend.</p> <p>// Despite calling an election during the pandemic, Justin Trudeau remains the Prime Minister of Canada, with the centre-left maintaining their leadership position in the country.</p>	<p>// According to projections by Deloitte, The Canadian economy rebounded and grew by 6.1% in 2021 and forecast to grow 3.8% in 2022.</p> <p>// Despite projected growth for 2022 and subsequent years, inflation is projected to average 7.2% in 2022, easing by 2023.</p> <p>// These developments will be echoed in a recovery in the labour market.</p> <p>// The nation’s economic recovery is undoubtedly on a slower path than expected, mainly due to the spread of Omicron.</p> <p>// However, Canada’s near-term economic growth trajectory remains solid.</p>	<p>// At the end of 2019, the environment had overtaken the economy as the public’s top preoccupation, and this remains despite the disruption of the pandemic.</p> <p>// The anti-racism protests that erupted worldwide in the spring of 2020 sparked a significant re-think of the issue among Canadians.</p> <p>// Before the pandemic, news in Canada was dominated by the issue of Indigenous rights and the issue is reemerging with frustration at the seemingly slow pace of forward movement. Indigenous issues also have considerable implications for the tourism sector.</p>	<p>// In the wake of en masse remote working as a result of the pandemic, online content and service delivery models will continue to proliferate, workplaces will stay remote (to varying degrees) ushering in the 5G era of mobile wireless communications.</p> <p>// With more resources freeing up as the pandemic begins to abate, a refocus on green tech is to be expected, in which Canada is generally considered a leader.</p> <p>// Health and hygiene innovation will also be both required and encouraged, particularly within the tourism industry as travel resumes.</p>	<p>// As part of its Paris Agreement commitments, Canada has pledged to achieve greenhouse gas (GHG) emission levels 30 percent below 2005 levels by 2030 and has set a goal of net-zero GHG emissions by 2050.</p> <p>// As the country emerges from the pandemic, Canadians can expect to see an increasing focus on achieving these goals.</p> <p>// Most Canadians favour action to address climate change, but there is less agreement on what action to take. Surveys show there are a significant number of Canadians concerned actions are moving either too slowly or too quickly.</p>	<p>// 2020 saw the federal government unveil draft regulations and associated analyses of the Clean Fuel Regulations (CFR) – requiring that all “primary suppliers” (producers and importers) of liquid fossil fuels achieve reductions in the lifecycle carbon intensity (CI) of their products.</p> <p>// Canada is seeing its most significant overhaul to its privacy laws in over 20 years which will create numerous obligations for Canadian and foreign businesses.</p> <p>// Cabotage laws may hinder the growth of the Great Lakes cruise industry, which work against Canadian ports – to the advantage of neighbouring US ports.</p>

Source: Dentons, Deloitte, Santander, Reuters

TRENDS ANALYSIS: DOMESTIC TRENDS

Intra-provincial travel is preferred among lower-income travellers, while middle-income Canadians show the highest level of ambition for international travel over the next 2 years.



Sources: Twenty31 – Quantitative survey of Canadian travel consumers, August, 2021

Base: All Respondents (n=1000); Asked only to those answering 'very likely' or 'somewhat likely' to Q2. 'how likely, if at all, are you to take an overnight holiday/vacation trip more than 40km in the next 2 years (i.e. by June 2023) assuming COVID-19 restrictions are lifted?'

Q8. And is that holiday/vacation trip likely to be...?

RESIDENT SENTIMENT: CANADA AND ONTARIO

Canadians feel safe to travel to communities nearby or within the same province, while residents in most provinces also share the same feeling to travel at a national level.

I feel safe to travel to...

January 2022

% Somewhat / Strongly Agree % Tout à fait d'accord / Plutôt d'accord	BC/C.-B. (n=208)	AB/Alb. (n=205)	SK/MB Sask./Man. (n=200)	ON/Ont. (n=604)	QC/Qc (n=415)	ATL (n=201)
Communities near me / ... dans des communautés voisines à la mienne	76%	84%	75%	79%	74%	79%
Communities in my province / ... dans des communautés de ma province	64%	80%	70%	69%	75%	67%
Other provinces or territories in Canada / ... dans d'autres provinces ou territoires du Canada	47%	64%	54%	52%	59%	32%
The United States / ... aux États-Unis	18%	38%	31%	24%	33%	13%
Internationally / ... dans d'autres pays	17%	34%	28%	22%	30%	11%

Green: indicates significantly higher than at least one other region

Red: indicates significantly lower than at least one other region?

Source: Destination Canada

To what extent do you agree or disagree with the following statements?

—

KEY IMPLICATIONS

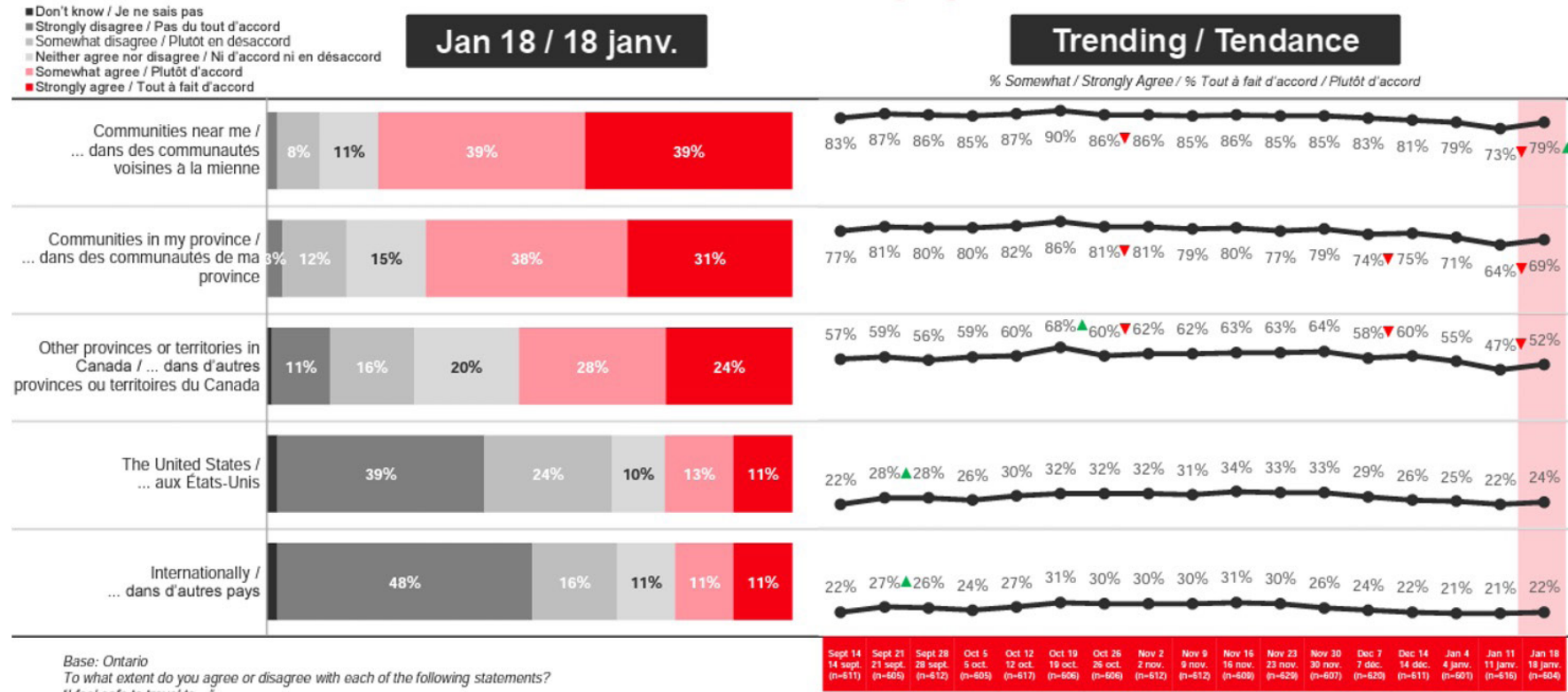
- // Ontario residents generally feel safe to travel within the province and the rest of Canada, which is a good indicator for Kingston to boost intra-provincial travel.
- // Residents from Alberta show highest willingness to travel among all Canadians.
- // If residents don't feel safe travelling within their own community, they will not feel safe receiving travellers from other communities.

RESIDENT SENTIMENT: ONTARIO

Most Ontario residents feel safe travelling to nearby communities or in the same province, a stable trend that may strengthen Kingston’s strategy to appeal to domestic travellers.

I feel safe to travel to...

January 2022



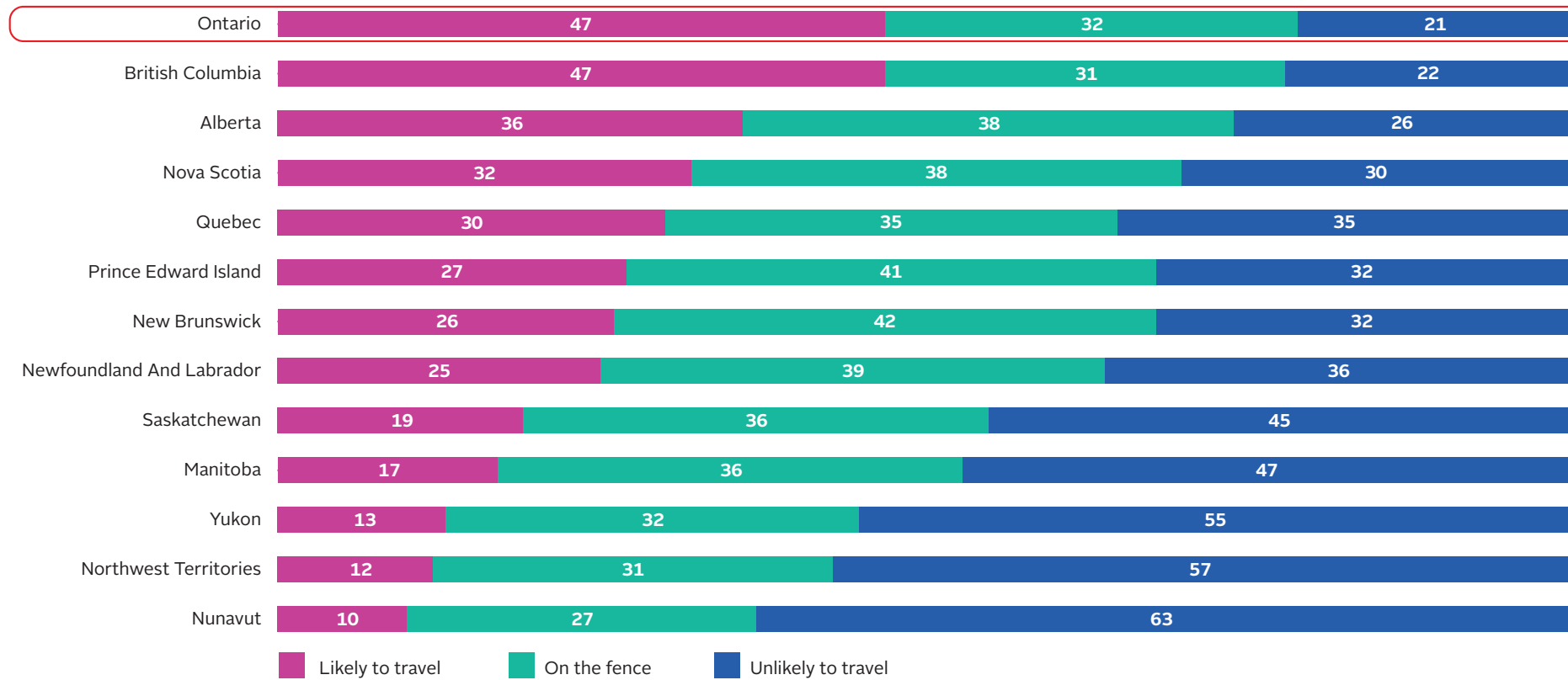
Source: Destination Canada

Base: Ontario

To what extent do you agree or disagree with each of the following statements?

PREFERRED DESTINATION FOR NEXT DOMESTIC OVERNIGHT LEISURE TRIP

Ontario, together with British Columbia, is well ahead of other provinces in travel preference among Canadians over the next year.



Source: Twenty 31, February 2021

Base: Canada, All respondents (n=2750)

Q15. How likely, if at all, are you to travel to each of the following provinces or territories for an overnight leisure trip staying in paid accommodation in the next two years? Please use a scale of 1 to 10, where 1 means you are certain not to travel there, and 10 means you are certain to travel there.

QUALITIES ASSOCIATED WITH CANADIAN PROVINCES AND TERRITORIES

Ontario is seen as naturally beautiful, easy to get to and with lots to see and do, and Kingston is well-positioned to combat negative perceptions.

	BC	AB	SK	MB	ON	QC	PE	NB	NL	NS	NT	YT	NU
Naturally beautiful	83	67	50	53	69	65	76	60	70	74	48	51	46
Lots to see and do	62	48	28	32	58	50	47	39	53	60	32	32	21
Easy to get to	60	47	47	34	56	48	47	42	34	58	20	15	12
Family-friendly	56	47	45	43	47	43	54	47	56	55	37	38	32
Lots of outdoor activities	56	45	38	39	44	40	43	41	51	48	39	45	36
Good food and drink	56	41	32	35	46	49	52	38	53	57	25	25	18
Somewhere I can be myself	53	41	36	33	46	36	40	37	49	48	32	30	23
Range of accommodation	51	41	31	33	46	40	40	38	43	52	20	25	16
Easy to get around	48	39	38	29	43	36	47	35	37	49	21	18	12
Exciting	48	33	20	22	43	36	33	29	44	38	31	30	23
Safe and secure	47	38	35	35	40	37	46	41	55	48	31	33	27
Lots of history	47	36	34	36	40	45	40	36	53	48	40	37	29
Relaxing	47	34	34	33	37	31	49	37	50	51	26	26	25
Good weather	47	30	27	25	42	30	37	32	26	42	17	19	15
Good shopping	46	37	20	23	45	39	27	31	31	46	15	13	13
Culturally diverse	46	33	29	31	42	38	28	30	36	41	29	27	24
Authentic	41	32	30	30	30	34	41	36	52	42	37	38	34
Crowded	41	28	14	12	46	36	18	17	20	26	12	10	12
Refined	39	24	19	17	32	30	21	22	28	29	16	16	18
Good value for money	39	33	37	30	35	32	39	35	39	43	19	20	15
Somewhere to gain a new perspective on the world	39	33	31	31	29	33	35	34	51	37	50	47	48
Has a unique culture	37	28	26	31	28	38	35	32	55	39	45	45	42
Romantic	37	24	16	16	28	35	34	22	33	34	19	20	15
Culturally unique	36	25	24	26	25	38	29	28	48	36	37	36	38
Challenging	32	24	20	20	24	24	19	20	36	21	31	33	33

Source: Twenty 31, February 2021

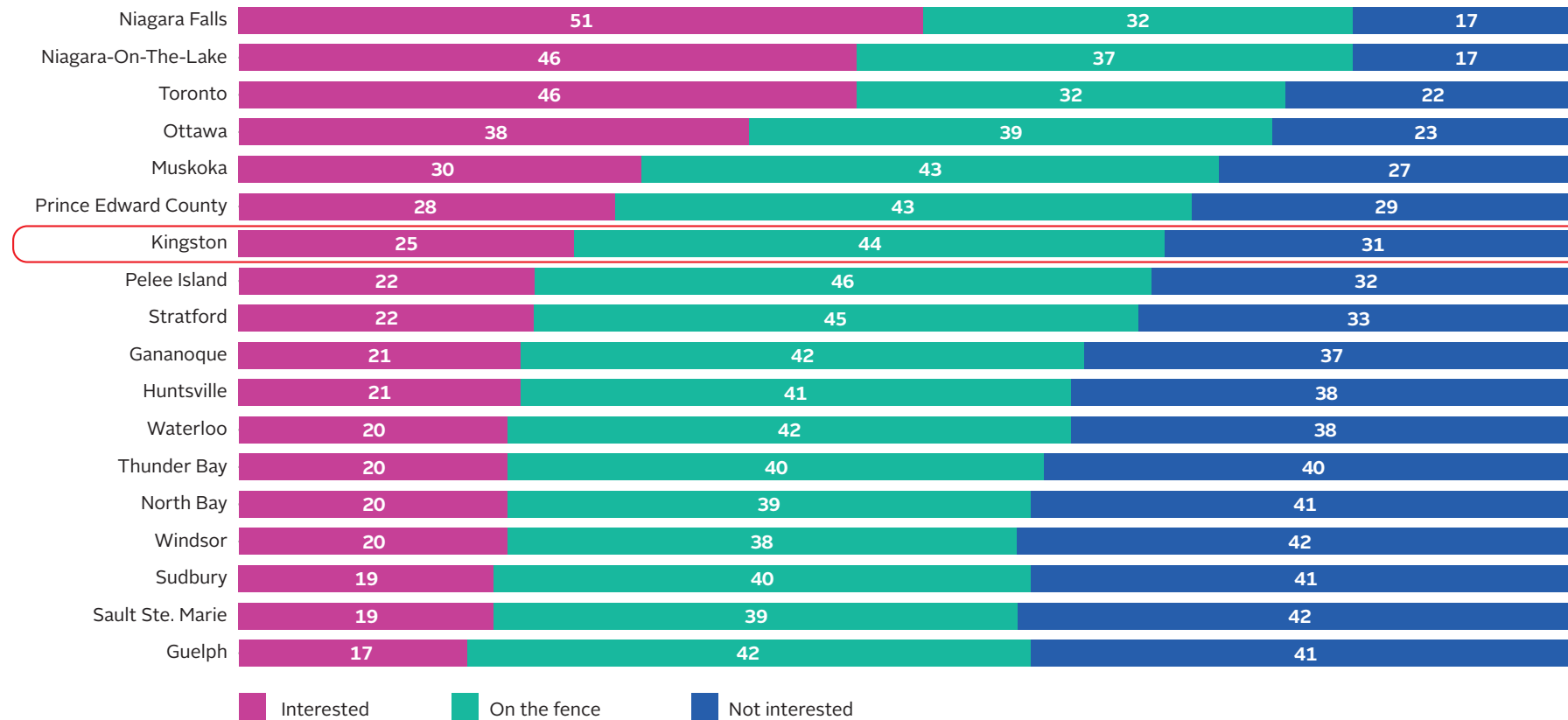
Base: Canada, All administered (n=295-1097)

Q27. Here is a list of qualities you might associate with some Canadian provinces/territories. For each province/territory listed below, please select which qualities apply to that province

INTEREST IN TRAVELLING TO DESTINATIONS IN PROVINCE: ONTARIO

Kingston is among the most interesting destinations to visit for Ontario travellers, with at least 1 in 4 being interested.

Ratings of travellers living in Ontario and neighbouring provinces



Source: Twenty 31, February 2021

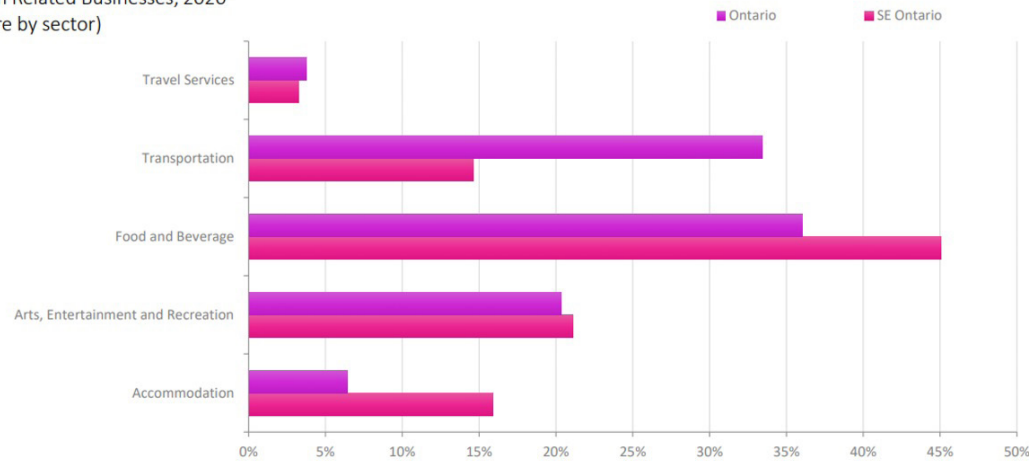
Base: Ontario (n=843)

Q23. Here are some destinations that you might choose to travel to within your own province/territory and neighbouring provinces/territories. For each one, please indicate how interested, if at all, you would be in travelling there for leisure purposes

SUPPLY DRIVERS: PRODUCT AND EXPERIENCES

Most tourism business in the region are food & beverage followed by arts, entertainment & recreation.

Tourism Related Businesses, 2020
(% share by sector)



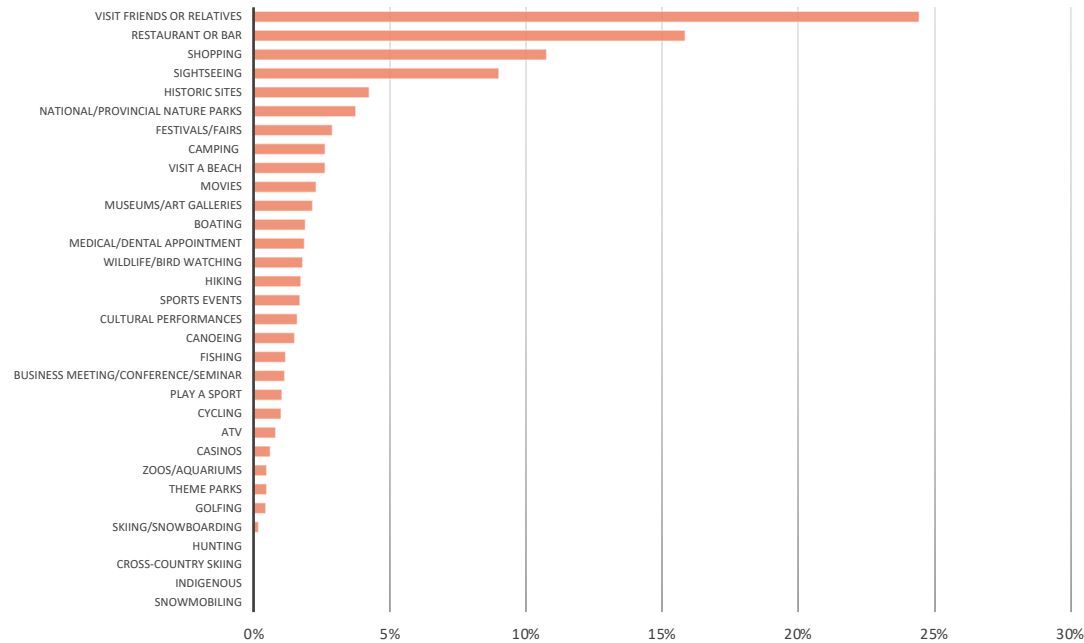
KEY IMPLICATIONS

- // In 2020, there were just under 2,500 tourism-related businesses in the South East Ontario Region which represents a 1.5% decline from the previous year.
- // Due to COVID-19 restrictions and changes in demand for tourism activities, some businesses were forced to close temporarily or permanently.
- // Most tourism businesses in the region are food and beverage (45%) and arts, entertainment and recreation (20%).
- // Over 80% of tourism businesses in the region have less than 20 employees, which given labour shortages, may make the sector more vulnerable.

Source: RTO9 (2019)

Supply drivers: product and experiences (continued)

Kingston is well aligned with activities that are being sought out by visitors to the region.



KEY IMPLICATIONS

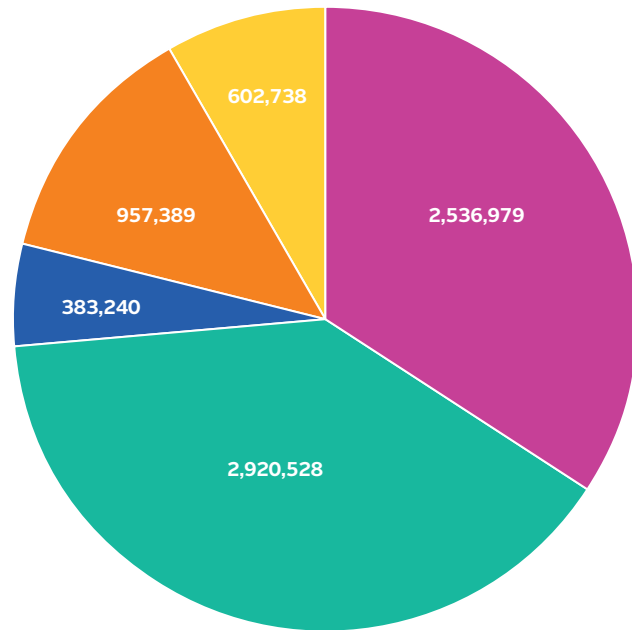
- // In addition to VFR being one of the primary trip motivators for visitors, but is also the number one activity visitors take part in.
- // Local restaurants and bars appeal to visitors, opening the door to showcase the regions culinary and wine scene.
- // Shopping activities also engage a significant number of visitors
- // Sightseeing, historic sites, visiting national parks and festivals and fairs are most preferred outdoor activities, while a number of number of outdoor/nature-based activities rank highly as well.
- // Key activities in the region also include:
 - Leisure: Sightseeing, visiting a beach
 - Events: Sports events, cultural performances
 - Entertainment: Movies, museums and art galleries

Source: RTO9 (2012)

DEMAND DRIVERS: TRIP MOTIVATION

Visiting friends and family is the main purpose for travel to South East Ontario.

Main purpose of trip



■ Pleasure ■ VFR ■ Shopping ■ Business and Conventions ■ Other Personal

KEY IMPLICATIONS

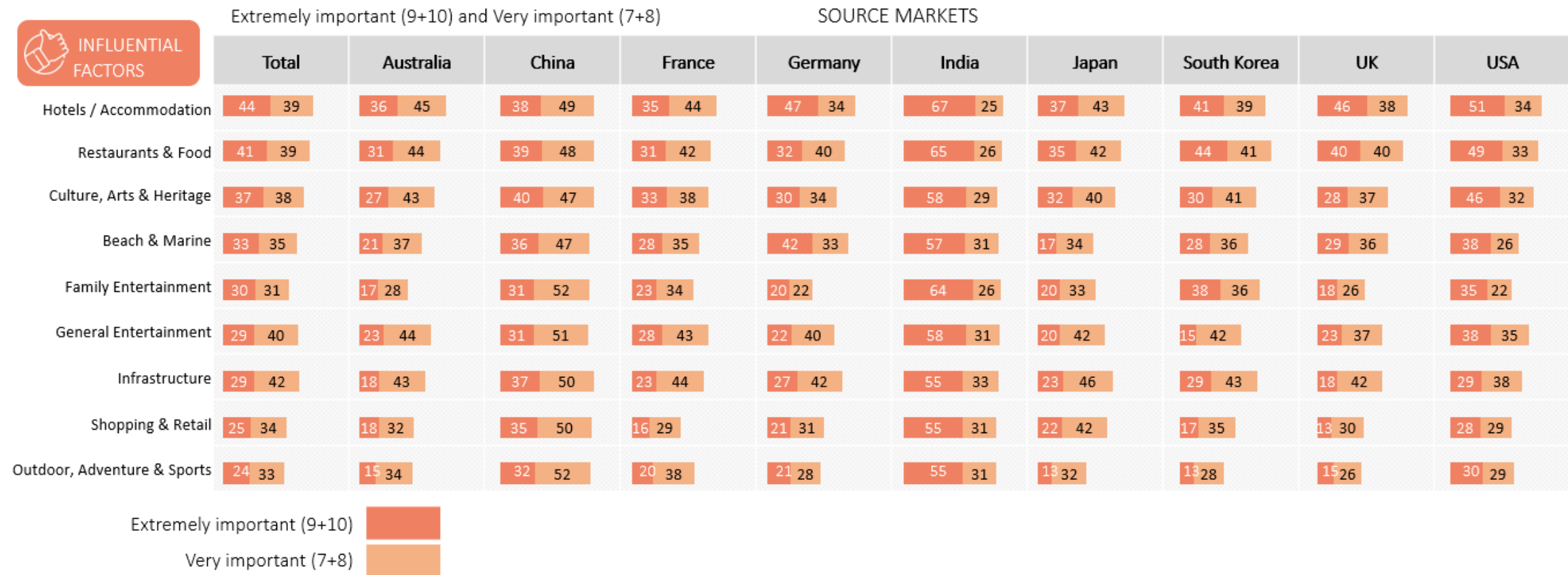
- // South East Ontario has 2 main trip motivators for sport travellers: Visiting Friends and Family (VFR) and Pleasure.
- // As we emerge out of the pandemic, these two primary motivations may prove larger than ever due to travel restrictions and stay at home orders.
- // Kingston has an opportunity to leverage these motivators as travellers will be looking to reconnect with friends and family as well as taking long-overdue pleasure vacations.
- // Looking towards destination resiliency, and a return to a "new normal", there is opportunity to utilize Business and Conventions to support a well-balanced four-season destination strategy.

Source: RTO9 (2013)

Demand drivers: trip motivation (continued)

Accommodation, food and beverage, and arts, culture, and heritage are driving factors for international travellers.

Source: Twenty 31, December 2021



Base per country: Australia, n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803. Total n=6838

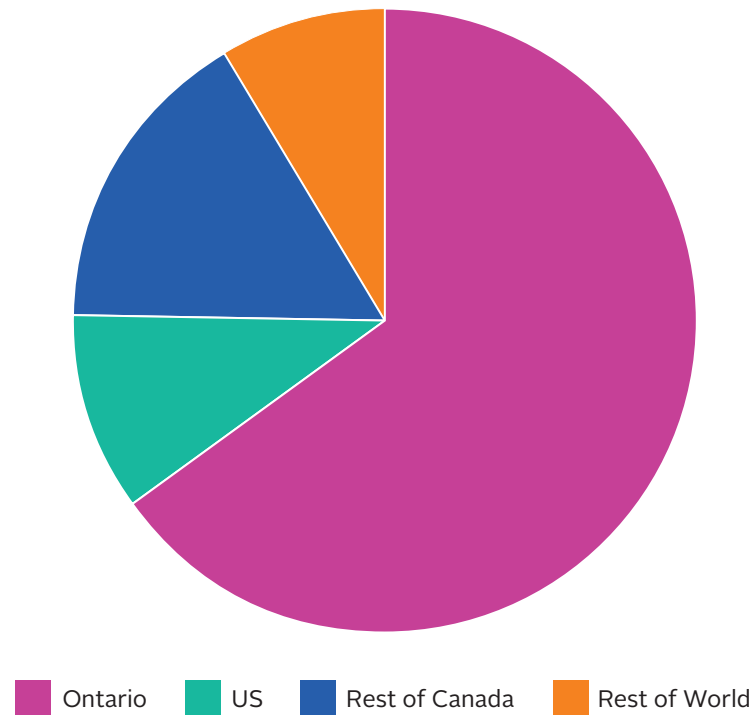
Base: All Respondents

DM4. How important are each of the following factors when you select a city to travel to for a leisure trip? Please use a scale of 1-10 where 1 means you think that factor is not at all important, and 10 where you think that factor is very important.

DEMAND DRIVERS: SOURCE MARKETS

Ontario residents make up more than half of visitor spending in South East Ontario.

Visitor Spending by Origin



KEY IMPLICATIONS

- // The majority of visitor spending in South East Ontario is by Ontarians.
- // Visitor spending from US contributes significantly to the region's tourism economy, which may present an opportunity for post-pandemic growth.
- // International travellers (outside US) are by far highest-yield market accounting for \$535 average spend per overnight visit, followed by rest of Canada (\$377).

Source: RTO9 (2019)

Demand drivers: source markets (continued)

Kingston's short-haul drive markets offer increased potential for growth post-pandemic.

- // While Canadian tourism recovery efforts were strategically focused on leveraging in-province and inter-provincial travel as an essential piece to sustaining key experiences and infrastructure, as travel restrictions easing across Canada and around the world, destinations can once again start to look at appealing to important source markets outside of Canada.
- // Prior to the pandemic, Kingston's key primary source markets included Toronto, Ottawa, Montreal and South East Ontario and a secondary target market of New York State. While the impacts of the pandemic haven't necessarily changed target markets, it has given even greater potential for markets outside urban centres (both within Canada and in the US) and the short-haul drive traffic.
- // The resumption of air service.

Source: www.vectorstock.com

Ontario



Québec



NY State



DEMAND DRIVERS: TRAVELLER TARGETS

Kingston's primary traveller target segments are strongly aligned with evolving visitor needs.

Tourism Kingston, supported by the 2019 IDS and in alignment with strategic partners, has identified 3 primary traveller target segments, which represent high-yield visitors that seek the unique experiences that Kingston has to offer and who will contribute positively to the local community, economy, and resiliency of the destination.

Source: Tourism Kingston



CONNECTED EXPLORERS



Connected Explorers are young couples under 40, both with and without children. They are a confident, youthful, optimistic group. They have a deep-seated need to travel and expose themselves to many new experiences. Travel for them is about expanding their horizons, and they are looking for a fully packed schedule of activities. They use technology at all phases of a trip including researching, booking, planning, and especially when sharing their travel experiences once back home.



PAMPERED RELAXER



Pampered Relaxers, as their name suggests, see a vacation as a chance to indulge in total relaxation and pampering. They want an ultimate spa and resort experience that lets them unwind, recharge, and reconnect with friends. This group is composed mainly of couples with an above-average income and travel budget. They want to make the most of their getaway by enjoying the finer things in life as well as some youthful, carefree fun.



KNOWLEDGE SEEKERS



Knowledge Seekers are couples in or nearing retirement, age 55+, with a higher income. They are entering a new phase of life as empty nesters with the time and money to go enjoy themselves, and travel is a part of this new lifestyle. They are looking to understand the places they visit by getting exposure to local customs. Trips usually last eight days as they want to fully appreciate where they are and explore all aspects of history, art, and culture. Travel for them is about expanding and stimulating the mind.

DEMAND DRIVERS: INTERNATIONAL TRAVELLERS

Canada shows high interest among international travellers to visit in the next 3 years.

DESTINATIONS OF INTEREST	% selected									
	Total	Australia	China	France	Germany	India	Japan	South Korea	UK	USA
USA	14	19	12	8	14	21	20	22	15	0
Italy	11	10	5	16	15	7	9	8	15	18
Japan	10	20	16	8	5	7	0	29	5	7
Spain	10	3	2	16	21	3	4	6	24	8
France	9	8	12	0	7	6	9	8	13	15
Australia	7	0	8	4	6	14	9	10	8	8
Canada	6	9	2	10	4	10	4	5	5	8
Singapore	6	11	9	0	1	18	4	6	2	1
New Zealand	6	23	5	1	3	5	3	3	3	5
Greece	6	6	1	8	14	1	0	1	13	6

Source: Twenty31, December 2021

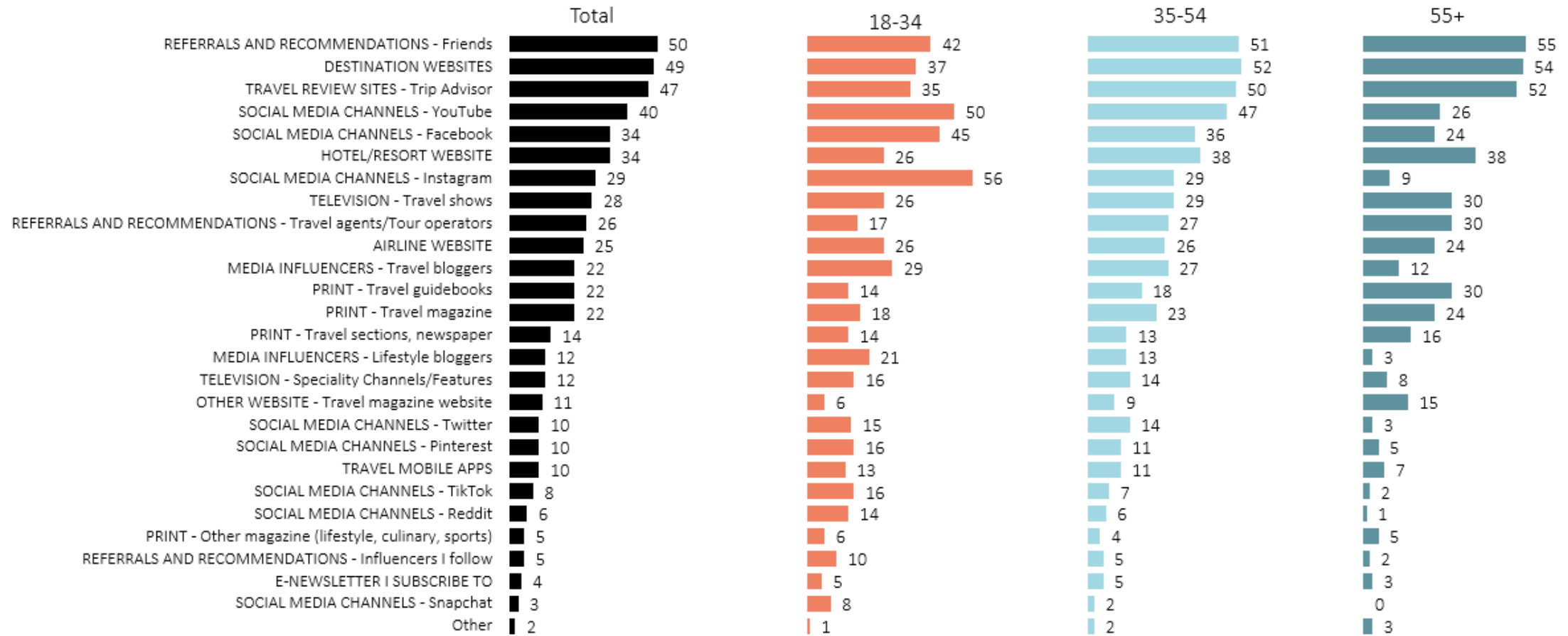
Base per country: Australia, n=809, China n=815, France n=802, Germany n=802, India n=803, Japan n=600, South Korea n=604, UK n=800, USA n=803. Total n=6838

Base: All Respondents

PF5. Looking forward to the next 3 years, which other international destinations are you considering as possible leisure destinations? We are only interested in those destinations that would require a flight to get to.

DEMAND DRIVERS: INSPIRATION SOURCES FOR CANADIAN TRAVELLERS

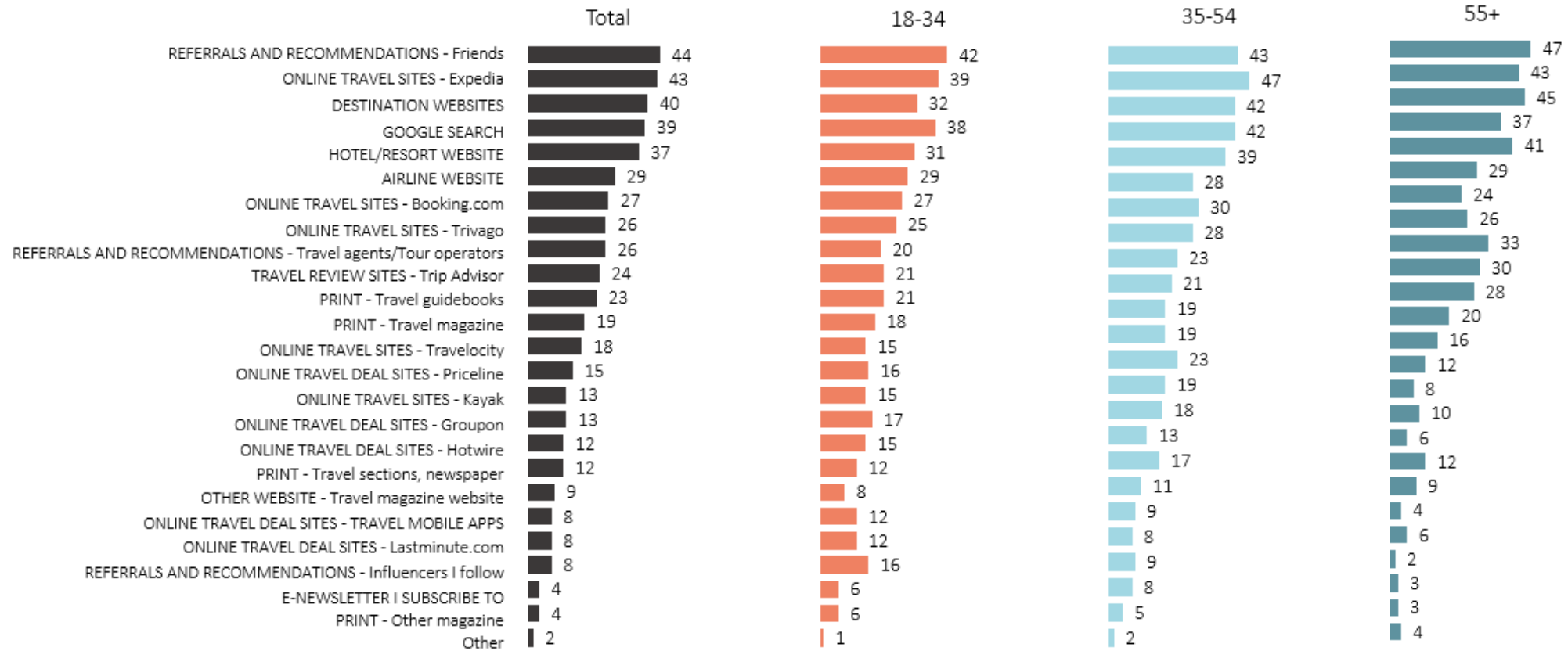
Among Canadians, word of mouth is the primary channel inspiring destination decisions.



Source: Twenty31

DEMAND DRIVERS: PLANNING CHANNELS FOR CANADIAN TRAVELLERS

Canadians rely heavily on personal networks along with online sources when travel planning.



Source: Twenty31 – Quantitative survey of Canadian travel consumers, August 2021

Base: n=1,000

Q26. And for planning your detailed itinerary for a holiday/vacation trip within Canada, which of the following would you tend to use? Please select all that apply.

DEMAND DRIVERS: DESTINATION BRAND

Since 2016, the brand has been fully integrated throughout consumer, partner, and social channels.



KEY IMPLICATIONS

- // Initially launched in 2016, Tourism Kingston together with the City of Kingston and KAP, established the brand to strengthen Kingston's presence in market, increase overnight visitation, and provide a better return on investment by uniting under 'one voice'.
- // The brand leverages Kingston's vibrant arts and culture scene to bring to life a hip vibe that is inviting and yet exclusive – creating the idea of being an insider on all that Kingston has to offer.
- // The brand has been expanded to include Kingston Merch to support a sense of place, belonging and being in the know.

Source: Twenty31 – Quantitative survey of Canadian travel consumers, August 2021

Base: n=1,000

Q26. And for planning your detailed itinerary for a holiday/vacation trip within Canada, which of the following would you tend to use?
Please select all that apply.

Demand drivers: destination brand (continued)

VisitKingston.ca offers a seamless and consistent brand message for both visitors and industry members.

The screenshot displays the Visit Kingston website interface. At the top, there's a navigation bar with "VISIT KINGSTON | FRESH MADE DAILY > MEMBERS". The main content area is divided into several sections:

- hip**: A large, stylized blue text graphic.
- MEMBERS**: A section header in a serif font.
- Kingston Merch**: A sub-section with a photo of people wearing branded t-shirts and a short paragraph: "From winter wear to tees and totes, show off your love for Kingston with one-of-a-kind merchandise."
- THE LATEST**: A section featuring a photo of a dessert and a glass of beer, with the sub-header "25 Things to Do in March 2022".
- PARTNERSHIP PROGRAM**: A section with a heading and text: "Please fill out the form if you are interested in our partnership program. In light of the May 1, 2022 to April 30, 2023. We will be extending our free brochure racking offer until April 30, 2022 and welcome front doors daily from 9 am to 5 pm. Invoices for the 2022-23 program will be issued after May 1."
- TRAVEL TRADE**: A section with a heading and a list of links: "CREATIVE KINGSTON", "UNIQUE EXPERIENCES", "DINING + CULINARY", "REQUEST A FAM", "SERVICES", "RESOURCES", "CONTACT".
- THE LATEST**: A section with a heading and sub-headers: "ARTS + CULTURE", "Meet the maker: Ksenia Kopynstynska of Ars Libri", "EAT + DRINK", "The 'art de flaner': SENS Cafe".
- TOP 25 THINGS TO DO**: A section with a heading and sub-header: "25 Things to Do in Kingston this Spring 2022".
- ISLAND Queen**: A video player showing a woman and a man on a boat, with a "Bekijken op YouTube" button.
- CONTACT our Travel Trade Office**: A button at the bottom right.

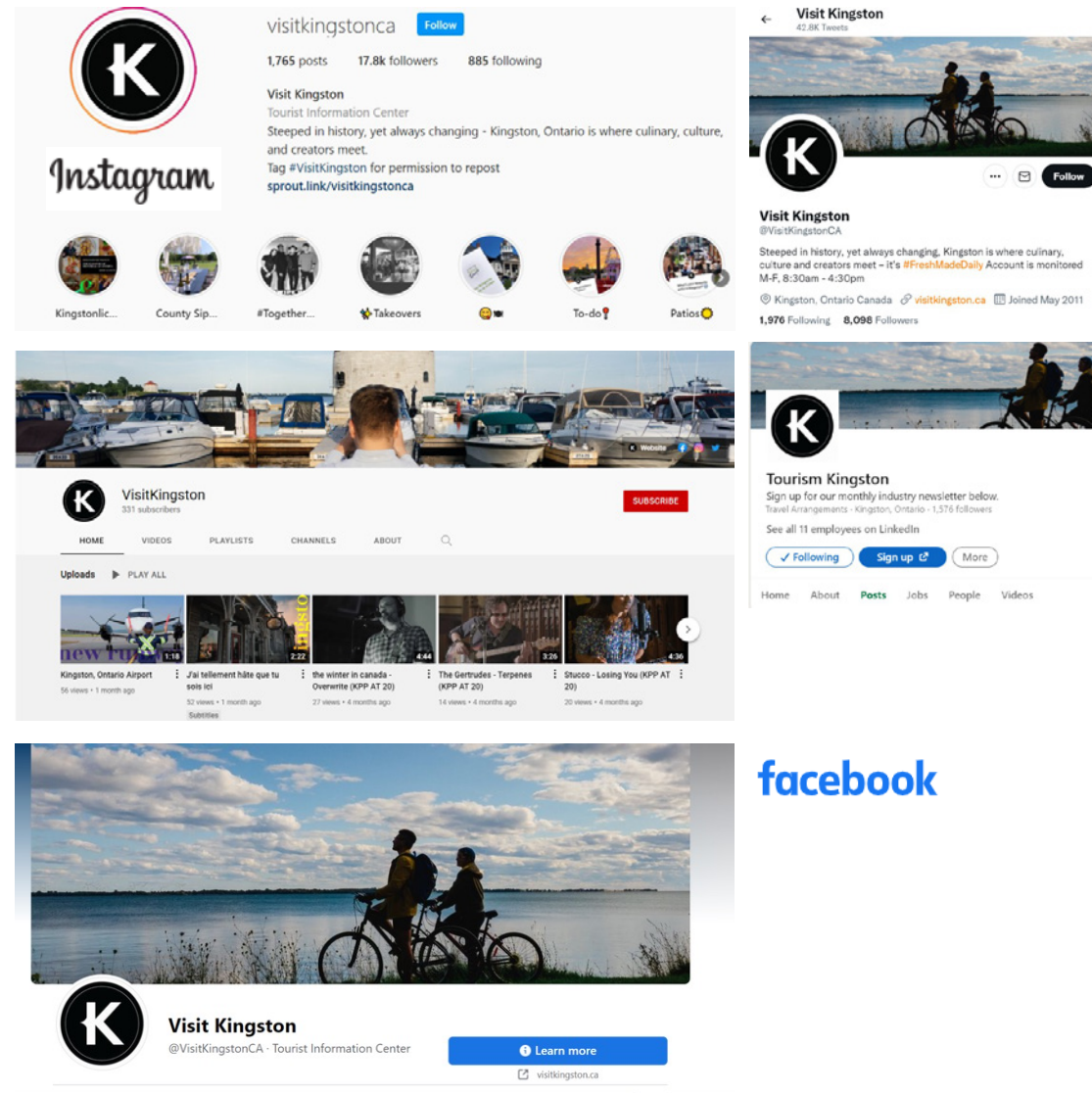
KEY IMPLICATIONS

- // Users can access inspirational content, search for key products and experiences (including things to do, experiences, and accommodations), as well as a trip planner.
- // The robot chat function is visible throughout the site, offering both visitors and members quick and easy access to support.
- // For members, each line of TK business is featured on the top navigation bar, while frequently accessed materials (e.g., industry news, newsletter, and partnership program) are featured on the Member landing page.
- // The site is translated to both French and Mandarin and member newsletters are also available in both French and English.
- // Links to social channels and partners are easily visible and allow prospective visitors to explore more.

Source: Tourism Kingston

Demand drivers: destination brand (continued)

Instagram and Twitter are the strongest performing social channels.



KEY IMPLICATIONS

- // Tourism Kingston utilizes 5 main social channels: Facebook, Twitter, Instagram, YouTube, LinkedIn, Tik Tok – all aligned with the brand and driving traffic to the website.
- // While all channels are consistent from a brand perspective, Instagram enables the most robust use of rich content (video, images, user-generated, take-overs, influencers, stories, etc).
- // Instagram and Twitter have the most regularly updated content (multiple times per day/week), with LinkedIn and YouTube being updated on a weekly or as needed.

Source: Tourism Kingston

DISCOVERY & ANALYSIS

Despite the pandemic, much progress has been made on implementation of the 2019 IDS which can be attributed to true collaboration, partnerships and alignment.

IDS Pillar	IDS Recommendation	Initiatives Identified for Implementation	Status
Pillar 1: Infrastructure, Transportation and Access	Better integrate the waterfront into the downtown tourism experience	<ul style="list-style-type: none"> // Richardson Beach shoreline revitalization // Richardson Beach bathhouse renovation // Douglas R. Fluhrer Park // Confederation Basin break wall // Closure of Ontario Street in front of Confederation Basin during July & August weekends // Creation of public space in front of City Hall // Increase business offerings including F&B along the waterfront 	<ul style="list-style-type: none"> // Construction anticipated to be completed Summer 2022 // Construction anticipated to be completed Summer 2021 // Design and Public Engagement anticipated to begin in 2023 // Construction anticipated to be completed Summer 2022 // Pilot conducted in 2019 with planning meetings to be held to determine future plans // Plans to develop a pedestrian safety plan across City departments for 2021 // Call out to vendors planned for 2020 with 4 F&B locations identified and partnership with Farmers' Market vendors being explored
	Utilize the Kingston Penitentiary (KP) as a core tourism zone with the inclusion of restaurants, retail and special events	<ul style="list-style-type: none"> // Multi-year agreement with the City and CSC to ensure year-round access // Explore permanent options for KP to serve as core tourism zone including F&B and retail and conduct assessment study to determine needs 	<ul style="list-style-type: none"> // Discussions around a 3-5 year deal for tours and filming taking place and motion anticipated by Mayor to Federal Government to accelerate approval process (2020) // A lot of interest from stakeholders but access dictates use (2020)

Discovery & analysis (continued)

IDS Pillar	IDS Recommendation	Initiatives Identified for Implementation	Status
Pillar 1: Infrastructure, Transportation and Access (cont'd)	Conduct a feasibility study: 1) Utilization of the Leon's Centre for meetings and conferences; 2) A new conference centre	// Determine inventory, rates and specs for Tourism Kingston to promote and sell // Hire a consultant to undertake the development of a feasibility study and determine stakeholder support for a new facility	// Conference and events strategies being applied through coordinated and strategic efforts // Feasibility study completed (2020) and updated to reflect COVID-19 (2021) and it was determined that stakeholders would support a new facility; and Hotel Capacity Research Study completed 2021
	Continue the work already in progress to attract new market entrant and/or increase frequency at the airport	// Secure flights from Toronto, one 'sunny destination' direct carrier and one daily flight from Ottawa and Montreal before 2023	// An Airport Advisory Committee has been created in partnership with the City to attract carriers, deliver branding and promotional materials in airport, partner on areas of increased need (e.g., Brier), and discuss development of land around the airport. A sales tool has been created to support discussions with prospective carriers and has resulted in new flights with PASCAN aviation
	Outline the business case for a downtown campus with a tourism, culinary and hospitality program including integration with Kingston tourism businesses	// Develop a 2-year program to build the tourism and culinary program downtown. Additional industry support to be provided to fill gaps in the tourism sector (e.g., housekeeping, line cooks, boat operators, etc.) // Develop a plan to enable a physical downtown campus	// The need for a specific resource has been identified (2020) // Partnership terms and project charter have been developed (2020) between the City of Kingston and St. Lawrence College. Next steps include development of an RFI for the development of Block 4 (North Block District) in association with the development of a downtown campus
	Position Kingston as a key cruise tourism hub	// Work with the Ontario Ports Coalition to ensure Kingston is top of mind, attend cruise trade shows to sell Kingston as a destination and gain 2-3 more cruise lines per year	// New cruise assets have been developed, a dedicated staff member has been hired at Tourism Kingston (2020) to sell to cruise lines. // Finalizing costs for deep water docks (2020)

Discovery & analysis (continued)

IDS Pillar	IDS Recommendation	Initiatives Identified for Implementation	Status
Pillar 2: Visitor, product, and experience development	Develop a full city product development road map to increase the number of market-ready operators, specifically: waterfront tour operators (boating and cycling), museums, art galleries, historic sites, and festivals and cultural events	<ul style="list-style-type: none"> // Support the RTO9 product/operator study // Conduct a museum market-readiness audit // Increase products and experiences (and associated marketing) for year-round and shoulder/winter season tourism 	<ul style="list-style-type: none"> // Host key stakeholder discussions to increase connectivity and establish baseline/inventory of product (2019) // Museum market readiness audit completed (2019) with recommendations to start being implemented in 2020 // 2020 Marketing plans incorporated more product offerings and experiences, supported by the museum audit
	Develop and promote a number of signature experience itineraries and associated packages geared towards FIT and group travellers, segmented by markets, demographics and season (with an emphasis on shoulder/winter)	<ul style="list-style-type: none"> // Create Canada Signature Experiences through Destination Canada, Destination Ontario, and the Culinary Tourism Alliance 	<ul style="list-style-type: none"> // 4 culinary itineraries and maps produced in 2019/20 supported by digital marketing. Feedback from travel trade sales calls and missions is being attained regarding product match for FIT(2020)
	Improve Kingston's appeal as a family friendly and couples destination	<ul style="list-style-type: none"> // Support industry development conversations to understand the need and value of targeted programming year-round 	<ul style="list-style-type: none"> // Host stakeholder discussion and establish partnerships that support targeted product development and programming supported by metrics that identify periods of need, develop influencer campaign to highlight targeted products and programming (2020)
	Launch the Ambassador program to focus on improving the visitor experience	<ul style="list-style-type: none"> // Train students and increase activity of VIC staff to actively greet and engage buses, cruise ships and pedestrians 	<ul style="list-style-type: none"> // Trained 35+ students and deployed VIC staff in branded uniforms to engage with visitors (2019). Launched a chat and text system to engage with Visit Kingston website visitors and digitally extending the Ambassador program to the planning and consideration stages of the trip planning cycle (2020).

Discovery & analysis (continued)

IDS Pillar	IDS Recommendation	Initiatives Identified for Implementation	Status
Pillar 2: Visitor, product, and experience development (cont'd)	Improve outreach and the targeting of diversified tour operators via an effective travel trade plan	// Create a 5 year Travel Trade plan	// Travel Trade plans are created as part of the ongoing 5-year business planning process; a Director of Sales and Travel Trade was hired (2019) to focus on air, cruise, bus and education in high potential markets in collaboration with Destination Ontario
	Effectively define Kingston's brand positioning and fully launch the One Voice vision	// Tourism Kingston to own tourism branding	// KEDCO adoption of the brand // Airport and Waterfront branded // Branding for points of entry and VIC completed (2019/2020); Director of Marketing and Communications hired and Destination Marketing transition to Tourism Kingston to ensure full integration of destination marketing (2019)

Discovery & analysis (continued)

IDS Pillar	IDS Recommendation	Initiatives Identified for Implementation	Status
Pillar 3: Industry Development	Support operators, retail, culinary and accommodation suppliers in winter/shoulder season with promotional packages and themed events	// Utilize new Culinary Tourism Strategy to partner with regional stakeholders to develop culinary tours and packages	// Creation of a food incubator program to support artisan food product development (2020), launched culinary campaign to highlight regional restaurants and shops; refreshed marketing materials (2020).
	Provide museums and heritage sectors with support to improve market readiness that includes increased professional development opportunities	// Provide social media and marketing support to KAM to that it can better support its members // Work with KAM to identify needs and develop training opportunities for their members // Host quarterly workshops that focus on increasing visitors through collaboration	// KAM is part of the Tourism Kingston Marketing Committee and working through a strategic plan (2020) to support market readiness, marketing and product development for its members // KAM provides financial support for professional and organizational development for its members (2020) // KAM website refreshes and training
	Effectively build out Kingston's potential as a small//medium sized business events destination; set up a business events advisory group	// Tourism Kingston's Meeting and Conferences Committee to host quarterly meetings // Improve assets for selling Kingston as a destination for meetings and conferences	// Meetings are held quarterly (on-going) and includes the Tourism Kingston Meetings and Conference Specialist that was hired (2020) // Business meetings and conferences is part of the 5-year business planning cycle and includes sales and partnership strategies that is aligned to brand
	Leverage Queen's expertise in hosting sporting events via a sport tourism promotional and management plan; set up a sports tourism advisory group	// Continue to work through the already well-defined Tourism Kingston Sport Tourism Advisory Group to strategically coordinate bids and leverage the Tourism Kingston Sport Tourism Development Fund	// Queen's and Tourism Kingston partnered on more than 4 bids in 2020
	Offer a series of training workshops for retail, culinary and tour operators to become more tourism aware and responsive	// Partner with the St. Lawrence College to facilitate workshops to increase tourism knowledge of key hospitality staff // Work with Corks and Forks Festival to offer service excellence training for culinary staff (though not run during the Pandemic)	// Training provided to wine festival staff (2019); customer service training provided to tourism and non-tourism student (2019) // Tourism recovery workshops

Discovery & analysis (continued)

IDS Pillar	IDS Recommendation	Initiatives Identified for Implementation	Status
Pillar 4: Policy and Regulatory	Develop a community engagement communications plan	// Continue to provide newsletters (consumer, KAP, VIC) and host a joint AGM and Tourism Awareness Week event to communicate the importance of tourism	// Unified marketing and communications under Tourism Kingston (2020). Marketing and Communications plans are created as part of the on-going 5-year business planning process. // Tourism Awareness Week created in 2022
	Via public-private partnerships, provide additional Wi-Fi infrastructure in the downtown core to support tourism and the visitor experience	// Add Wi-Fi to 3 more heavy traffic/tourism location in the next 5 years	// Hired consultant (2019) to conduct a survey to all City Wi-Fi locations (Airport, VIC, KAM Properties)
	Improve pedestrian-friendly infrastructure in the City	// Work on a pilot program for the closure of Ontario Street from July to August // Allow Canada Day celebrations to have a better presence downtown with more street closures	// Pilot conducted with community partners (2019)

Initiative progress may have been impacted due to COVID-19 and require verification

APPENDIX B

Initiative Prioritization Assessment & Results

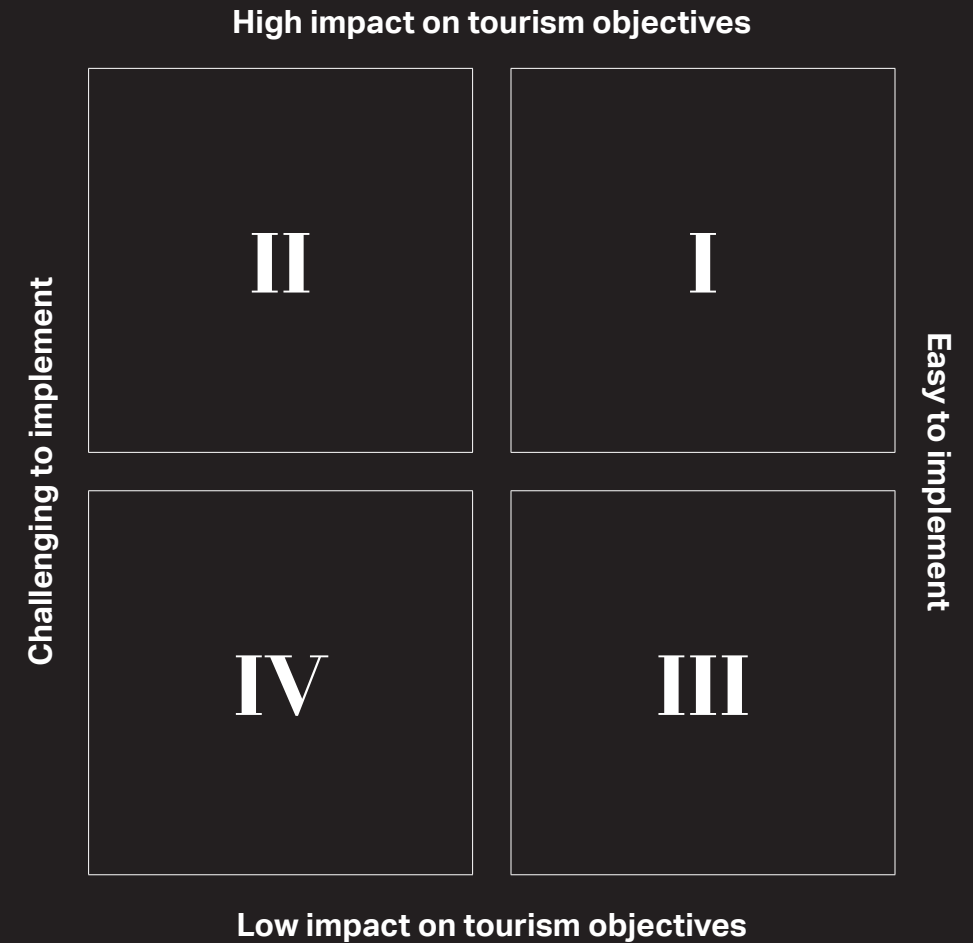
Prioritization Assessment

With the Discovery phase completed, Tourism Kingston identified a multitude of possible initiatives that it could undertake to achieve its strategic objectives over the next three years.

The question then was how to prioritize initiatives to identify the ones that would most likely enable Kingston's tourism industry to achieve their strategic objectives given limited funding and staffing resources available to oversee its implementation.

Tourism Kingston's IDS Steering Committee engaged in a prioritization exercise to rank each initiative identified, ultimately categorizing initiatives in the following way:

- I. Immediate opportunities that can be accomplished in 2022
- II. Opportunities requiring development/exploration, with strong likelihood to achieve objectives, that need more time/attention/research and resources
- III. Opportunities that may have some/niche impact on objectives and are easy to implement
- IV. Opportunities that may need to be reassessed when conditions improve to make them easier to implement or become more important (e.g., trends become more favourable)



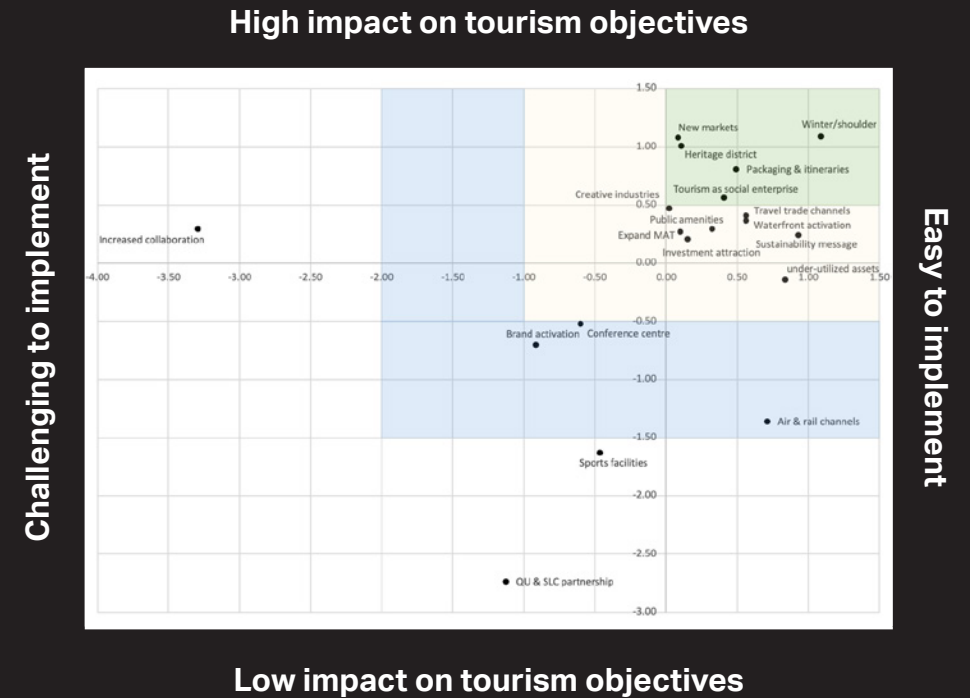
Prioritization Assessment Results

Results of the prioritization exercise conducted with Tourism Kingston's IDS Steering Committee resulted in a clear listing of priorities with strong impact on immediate objectives, and that were relatively easy to implement versus others that may require a longer runway for implementation. The results of the exercise were quantified, normalized for outliers, and depicted in the following chart.

Initiatives located in the top right quadrant are those that are most likely to achieve immediate strategic objectives and that are the easiest to implement, while those in the bottom left quadrant are those that require additional development.

Results of this exercise explicitly define the importance and ease of implementation of initiatives based on the identified objectives.

It is important to note that results of this process are not standalone – meaning additional conversations and expert opinions were required to finetune the importance, order, and timing of the initiatives listed.



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