

KINGSTON - POISED TO MOVE TO THE NEXT LEVEL

KINGSTONOMICS 2008!

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BRAIN TRUST

MARKETING & COMMUNICATIONS



Poised:

Ready to act

...fully prepared or in position to do something

...marked by balance and readiness for action

Kingston's Opportunity

- *You've done the work!*
- Premier Ranked Tourist Destination (PRTD) project completed December 2007
 - Thorough assessment of Kingston as a tourism destination
 - Starting from a position of strength
 - Deficiencies and gaps exist
 - Recommendations for improvement endorsed by the tourism industry

What Needs to Happen?

- Kingston's elected officials must recognize the opportunities in the PRTD process and actively engage and participate in implementation
- Kingston's tourism industry must drive the implementation of the PRTD recommendations
- Kingston's DMO should facilitate the implementation process

What is the PRTD Project?

- A partnership between government and the tourism industry



**EMPLOYMENT
ONTARIO**

- 1000 Islands & St. Lawrence Marketing Partnership

PRTD Context

- Foundational piece to Kingston's tourism product and experience development
- Delivers a series of short term wins and longer term strategies
- Designed to identify opportunities to grow tourism
- **The Goal:** *increase jobs and economic growth in Kingston*

Kingston Today

- Engaged in a battle for market share
- Competitive destinations are hard at it
- Declines in tourism visitation and revenue
- Uncertainty dominates the landscape
- Rising property taxes
- Economic growth is needed

Kingston Today

- You have a track record of success
 - Market Square
 - Kingston Sports and Entertainment Complex
 - Grand Theatre
 - Multiplex Community Centre
 - UNESCO World Heritage designation
- Leaders in destination marketing are working together

Starting From a Position of Strength

- The first Capital of Canada
- Home to Sir John A. Macdonald, Canada's first Prime Minister
- Fort Henry - a UNESCO World Heritage Site
- A picturesque waterfront and exciting downtown
- *NEW* Regional Sports Entertainment Centre
- *NEW* Multiplex Community Centre
- Almost 10 million people within a 3 hour drive
- Additional resources to market - DMF
- Success in the lucrative sports tourism market
- Industry leaders who want to succeed

What is the Premier-ranked Tourist Destination Project?

Measures three tourism dimensions:

PRODUCT

KINGSTON

PERFORMANCE

FUTURITY

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Photo: Justin Papp

Product - Core Attractors

- CORE - Motivator for the trip
- Features or experiences - main reason for travel to the destination
- Can be a "*cluster of assets*"
- Supporting Attractor – Things experienced once in the destination

Product - Core Attractors

- Fort Henry National Historic Site
- Accessible Waterfront & 1000 Islands
- Downtown Entertainment, Culture, Shopping and Dining
- Heritage & Living History
- Four-Season Sport Tourism

Fort Henry

National Historic Site

- Part of a UNESCO World Heritage Site - The designation of Fort Henry, the Rideau Canal and the Kingston Fortifications represents the first World Heritage Site in Ontario and the 14th in Canada
- Visitors* enter a reproduction of 19th century military life offering guided tours, scenic views, and musical performances by the Fort Henry Guard ***120,000 in 2006**
- Wednesdays, June to August, guests experience the pomp and pageantry of the British Military of 1867 as they perform the famous sunset ceremony
- Group tours and education programs are available

Accessible Waterfront

- Lake Ontario, the St. Lawrence River and the Rideau Canal (part of a UNESCO World Heritage Site) are picturesque water-based attractors, offering a variety of seasonal activities including guided day and overnight cruises, pleasure boating, sailing, wind surfing, canoeing, kayaking, power boat charters, scuba diving, sport fishing, hunting, hiking, biking, and birding
- Kingston is positioned as the gateway to the 1,000 Islands, large and small islands occupy the St. Lawrence River

Downtown Entertainment, Culture, Shopping and Dining

- Live music, theatre, concerts, events and performing arts presented on main stages, in concert halls, at annual festivals at Market Square and the newly restored Grand Theatre
- Unique retail shops offering one of a kind items, books, fashion, sporting goods, antiques and gifts
- Culinary experiences served up by recognized chefs in charming restaurants, casual bistro's and a variety of comfortable and cozy pubs
- Four season experiences in the heart of downtown with its eclectic and accessible streetscapes

Heritage & Living History

- An area rich in heritage with sites of national and provincial significance:
 - 3 UNESCO Heritage Sites
 - 2 National Historic Sites
 - 33 Provincial Heritage Sites
 - 247 Local Heritage Sites
 - 181 Architectural Heritage Sites
 - 25 Shipwreck Interpretive Tours/Dives

Four-Season Sport Tourism

- Kingston has a history of great athletes and great sporting events
- 12 multi-sport facilities including the NEW:
 - Kingston Regional Sport & Entertainment Centre
 - Kingston Multiplex Community Centre
- A record for attracting regional, provincial, national, international sporting events
- *Plan and Play* sports tourism initiative - on-line calendar, event resume, and facility guide

Supporting Attractor

- Outdoor Recreation
 - Year-round outdoor recreation activities include hiking, cycling, snowshoeing, snowmobiling, cross country skiing, birding and golf

Product

- Attractors are part of a regional complex linked to the destination's physical setting and history
- Attractors compete with nearby destinations:
 - Cornwall, Gananoque, Brockville, Morrisburg, towns on the U.S. side of the St. Lawrence River
- Other Ontario destinations are competitors:
 - Toronto, Niagara, Ottawa, Georgian Bay, Prince Edward County with their heritage and water based experiences

Product

- Attractors are considered unique, are memorable and do motivate travel
- The destinations offering is not considered superior because it offers a better guest experience – ***we don't know!***
- The destination offers mass and niche appeal and attracts guests from beyond Ontario's borders
- Core attractors attract limited visitation on a year-round basis

Product

Quality & Critical Mass

- The region offers a range of experiences, few sustain interest for more than 24 hours
- Purchasing options are plentiful, online, other sites, hotels at varied price points
- Range of experiences are widely promoted once in the destination

Product

Quality & Critical Mass

- Dining options at a range of price points
 - Accredited chefs, wine lists with 25+ labels, name recognition beyond the local region
- There is a range of shopping options
- Cultural entertainment options are plentiful
- Investment in animating public spaces

Product

Satisfaction & Value

- The destination *may* be friendly, hospitable, provide good service and value for money
- ***We don't know!***
 - Guest experiences are tracked on limited basis
 - Operators survey guests, info not been available

Product

Access / Location / Transportation

- Positioned to capitalize on a population base of 10 million people within 3 hours
- Transportation to the region is excellent
- Good transportation within the destination
- Docking facilities – 92 visitor slips

Product

Accommodation

- Accommodations available at the low to mid-range price – 2100+ rooms
- Represented by chain hotels/motels, independents and a selection of B&B's
- Good proximity to attractors

Performance

Frontenac County – 2004 CTS/ITS, Statistics Canada

- 2,645,045 Person Visits
 - 1,461,470 Same Day
 - 1,183,574 Overnight
- Overnight visitors - 79% Canadian, 16% from USA, 5% International
 - 45% on pleasure trips
 - 38% traveling to visit friends and relatives
- Overnight Activities
 - 61% VFR, 51% Shopping, 38% Outdoors/Sports Activity, 35% Sightseeing, 25% Museums/Art Galleries Historic Sites, 24% Fishing, 23% Parks, 16% Boating

Performance

Occupancy & Yield

- 2006 occupancy 64%, Ontario/Canada 65% PKF
 - ADR \$106 – *Canada \$123*, Rev Par \$62 – *Canada \$79*
- In 2004 visitors spent \$335,848,552
- Average visitor spending
 - Overnight - \$217.09 pp - Ont. \$270.27
 - Day trip - \$53.99 pp - Ont. \$62.56
- Spending by all visitors generated \$231,903,000 in direct, indirect and induced contributions

Performance

- Quarterly distribution of total visitation:
 - Q1 - 15%
 - Q2 - 30%
 - Q3 - 32%
 - Q4 - 23%
- Destination attracted 139,268 meetings and conventions motivated trips, 5% of the total M&C motivated trips to Ontario

Performance

Critical Acclaim

- Is a “must-see/must do” destination
- Few attractors are considered “best in class”
- UNESCO World Heritage Destination
- Images of Kingston, especially Fort Henry, used in OTMPC advertising and publications

Futurity

- Tourism is a net positive contributor to economy of the region - \$335 million in total spending in 2004

CTS/ITS, Statistics Canada

- \$231 million in direct, indirect and induced contributions
- \$120 million in labour income
- Generating 4,372 jobs
- \$141 million in total taxes - \$70.7 in municipal taxes

Futurity

Destination Marketing

- DMO in place – KEDCO & KAP in partnership
- The DMO not funded to reach target markets
- Marketing strategy is in place
- Tourism development plan not in place
- Individual customer service training takes place
- “Importance of Tourism” issues exist

Futurity

Product Renewal

- Investment made in past 5 years - \$5.2 million, 87% in past 2 years
- Reinvestment in programming and infrastructure
 - St. Lawrence Parks Commission received \$15 million in capital funding for the Fort Henry Restoration Project
- Underdeveloped & underperforming assets exist
- A trained tourism labour force is readily available

Futurity

- Carrying capacities to sustain local ecosystems and quality of life
 - Environmental monitoring program not in place
 - There is current/planned water treatment delivery capacity to accommodate current / projected levels of visitation
- There is political will to move forward with projects considered to further the objectives expressed in the Official Plan

Observations

- Industry is in transition organizationally
 - Marketing and destination development; who is best equipped to deliver?
 - A healthy partnership now exists between the tourism agencies - KEDCO, KAP
 - Productive and on-going dialogue is underway

Observations

- Attractors have potential to be further developed as overnight, year round experiences
 - Many are underdeveloped and underperforming, especially not for profit, public attractions
- Day and overnight trip expenditures are below provincial average
 - Is it possible to extend length of stay?
 - Majority of overnight trips VFR
 - University population/visitors not viewed as “tourism”

Observations

- It is unknown if the destination delivers good service and value for money
- Importance of tourism is not widely understood
- Investment in new infrastructure leads one to believe there is a strong will to get to the next level

Recommendations

1. Clarify roles - tourism marketing, visitor servicing and destination development

- Continue dialogue between KEDCO and KAP
 - Determine ideal organizational structure related to tourism marketing and visitors servicing
- Continue dialogue with the City
 - Determine ideal role, consider destination development in partnership with the industry
- Initiate discussions with Chamber, BIA
 - Agree on roles of these organizations

Recommendations

2. Implement a Kingston Tourism Destination Development Plan

- Determine who is best to facilitate this process
- Plan becomes foundation for PRTD recommendations
- Industry should lead implementation in partnership with the City and KEDCO
- Plan will rally the industry to a focused approach for long-term tourism destination development

Recommendations

3. Increase day and overnight trip expenditures:

- Leverage visiting friends and relatives trips
- Facilitate industry partnerships; create opportunities for dialogue to develop new / creative travel experiences

4. Identify, prioritize, improve underdeveloped and / or underperforming assets:

- Public / not for profit historic attractions
- University population and guests

Recommendations

5. Increase awareness of the Importance of Tourism

- Initiate campaign targeting influencers; business leaders, residents, elected officials
- Use Ministry's "*Making the Case for Tourism*" tool kit
- Empower industry to be advocates for tourism
- Establish a resident based "Ambassador Programme" designed to inform residents of the value of tourism then equip them to be tourism ambassadors

Recommendations

6. Introduce annual visitor survey

- Empower Chamber, BIA, tourism operators to deliver – 2 weekends per quarter, communicate the findings to the industry

7. Introduce industry-wide hospitality training

- Encourage BIA, Chamber to deliver *OTEC* programs
- Develop Kingston's unique attitude of service excellence
- Create employee recognition program that rewards good service

Poised - Ready to act

...fully prepared, in position to do something

...marked by balance and readiness for action

- You've done the work and know what needs to be done
- Commit today to doing *something*
- Something is *action* to move to the next level



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