

Better Together.

Data-Driven Cross-Border Partnership





1095

Spirit of Sir John A.

CANADIAN PACIFIC

DESTINATION
CANADA

Travel
Alberta
Canada

THE
EMPIRE STATE
BUILDING

BC
DESTINATION
BRITISH COLUMBIA

NIAGARA
FALLS
USA

Visit Derbyshire

Manitoba
CANADA'S HEART BEATS

Wesgro
cape town & western cape
tourism, trade & investment

1000 Islands
International Tourism Council

MONTANA

TOURISME /
MONTREAL

COLORADO
COME TO LIFE

BANK
& LAKE
TOUR

KINGSTON
visitkingston.ca

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Destination Insights to run their organizations and
realize their full potential.

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Los Angeles

U.S. TRAVEL
ASSOCIATION

VANCOUVER
V

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OREGON

Destination
NSW

Cymru
Wales

panamá

TORONTO

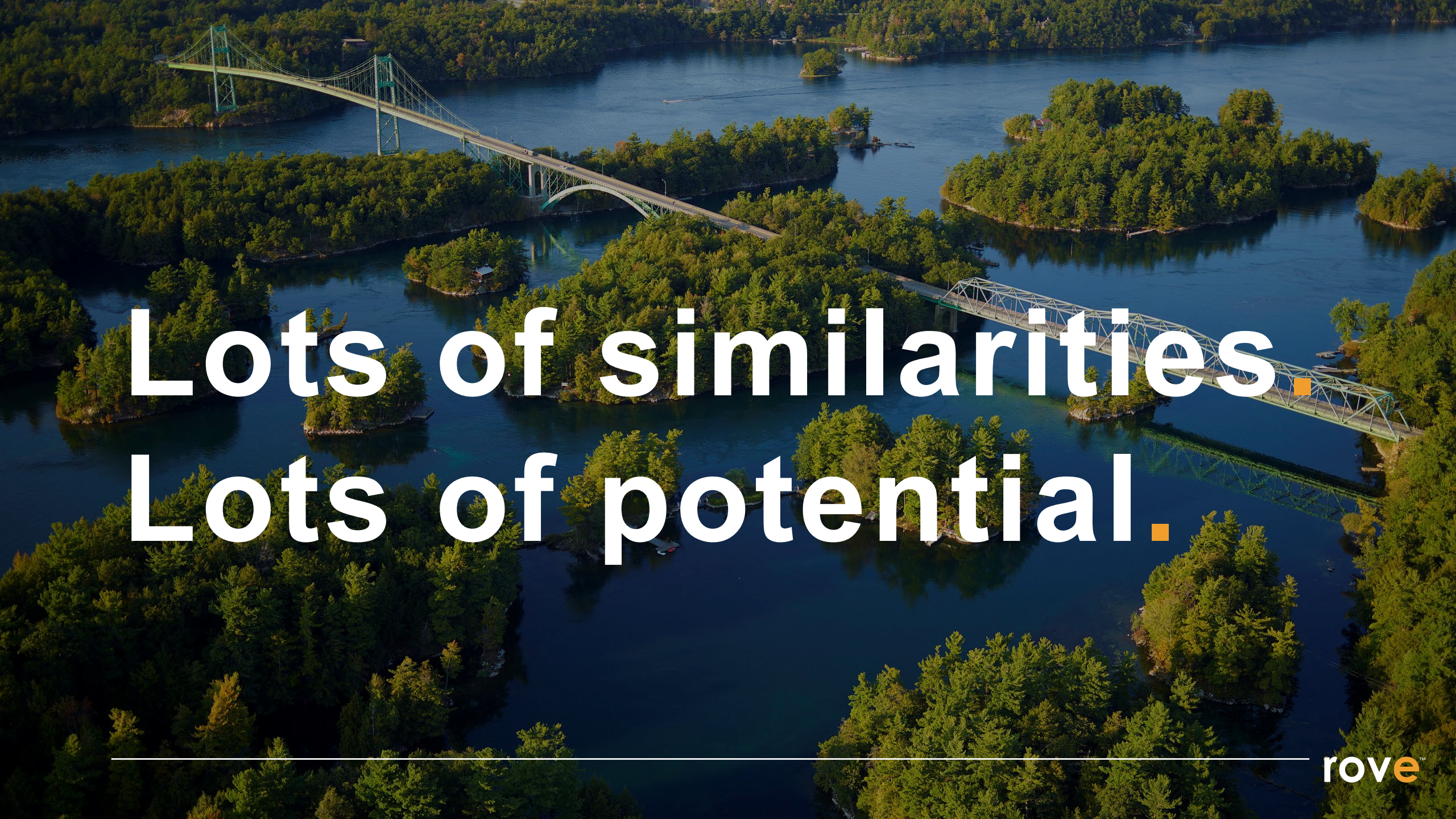
DESTINATION
DOOR COUNTY

HV
NY Hudson Valley
MAKE IT YOURS

VISIT LEWES
COAST & COUNTRY

VISIT
EASTBOURNE

GUAM
VISITORS
BUREAU



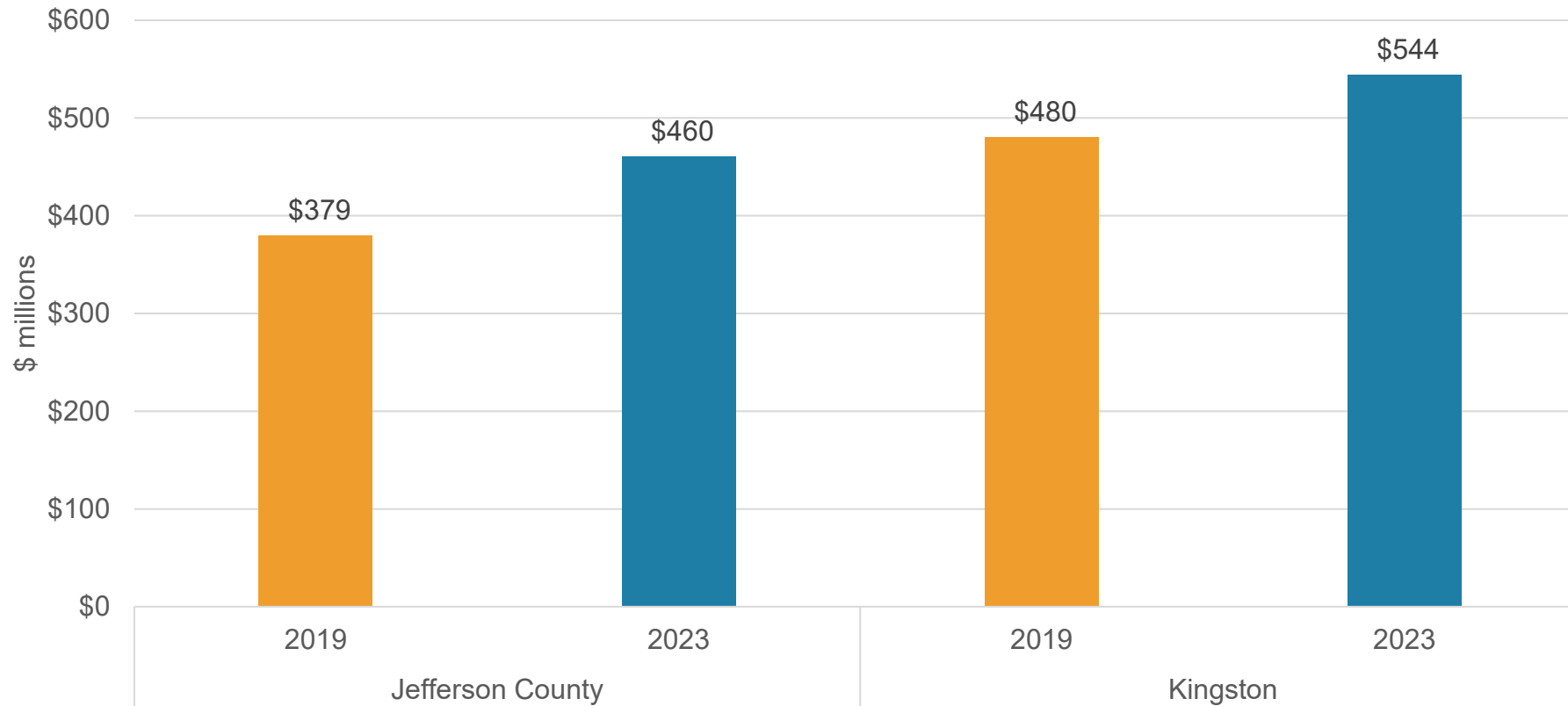
Lots of similarities
Lots of potential.

The visitor economy has recovered to pre-pandemic levels

Both Kingston and Jefferson County visitor spending has returned to pre-pandemic levels.



Total Visitor Spending (CAN \$)



Source: Tourism Economics (Jefferson) and Ontario Ministry of Tourism, TREIM Model (Kingston)

Similar community impact

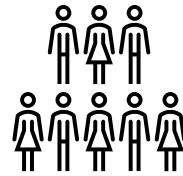
Both visitor economies employ similar number of jobs and deliver similar tax revenues (based on spend)



Direct Jobs attributed to tourism industry

Jefferson County = 4,423

Tourism Kingston = 4,530



Total tax revenue from tourism related spending (CAN)

\$ Jefferson County (8%) = \$55.9M

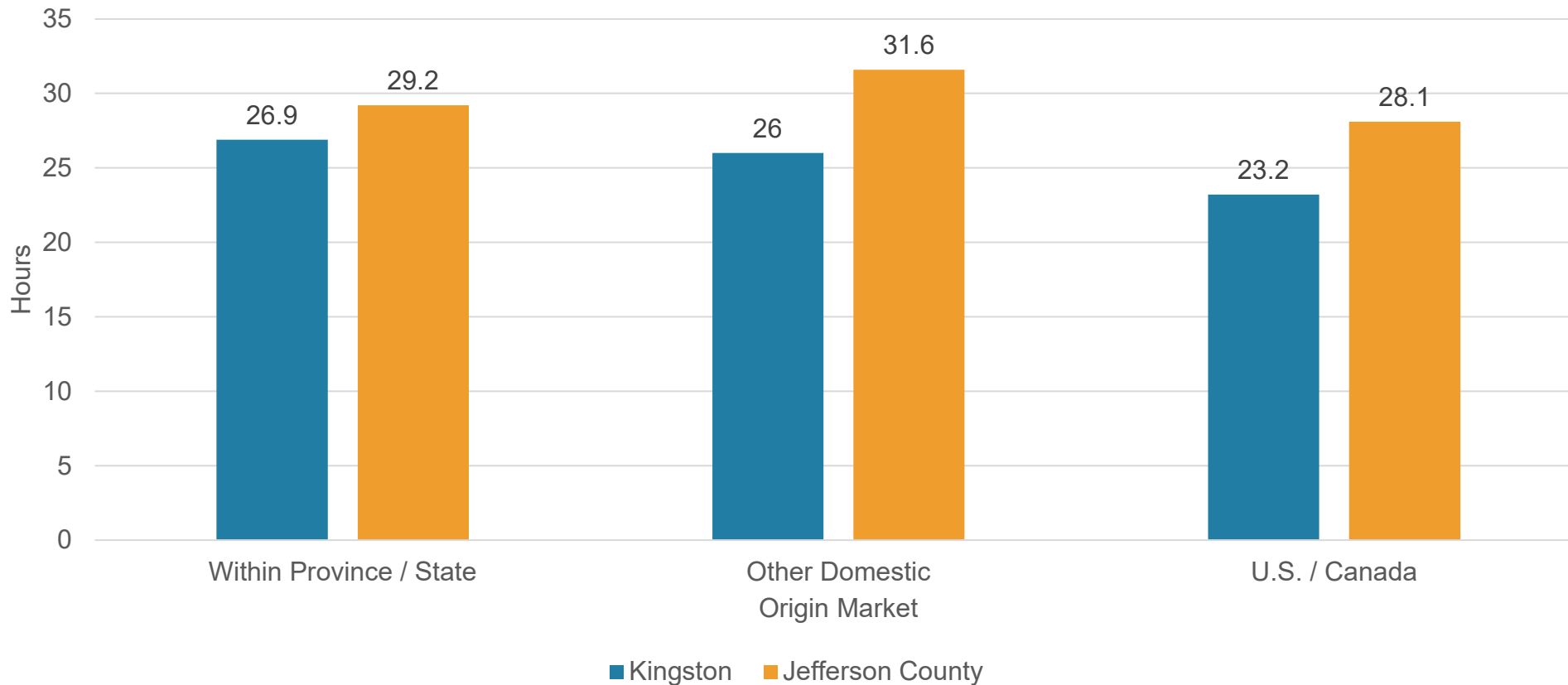
\$ Tourism Kingston (13%) = \$105.3M

Similar length of stay across region and origin markets

The average length of stay for both Kingston and Jefferson County is app. 1 night / 2 days.

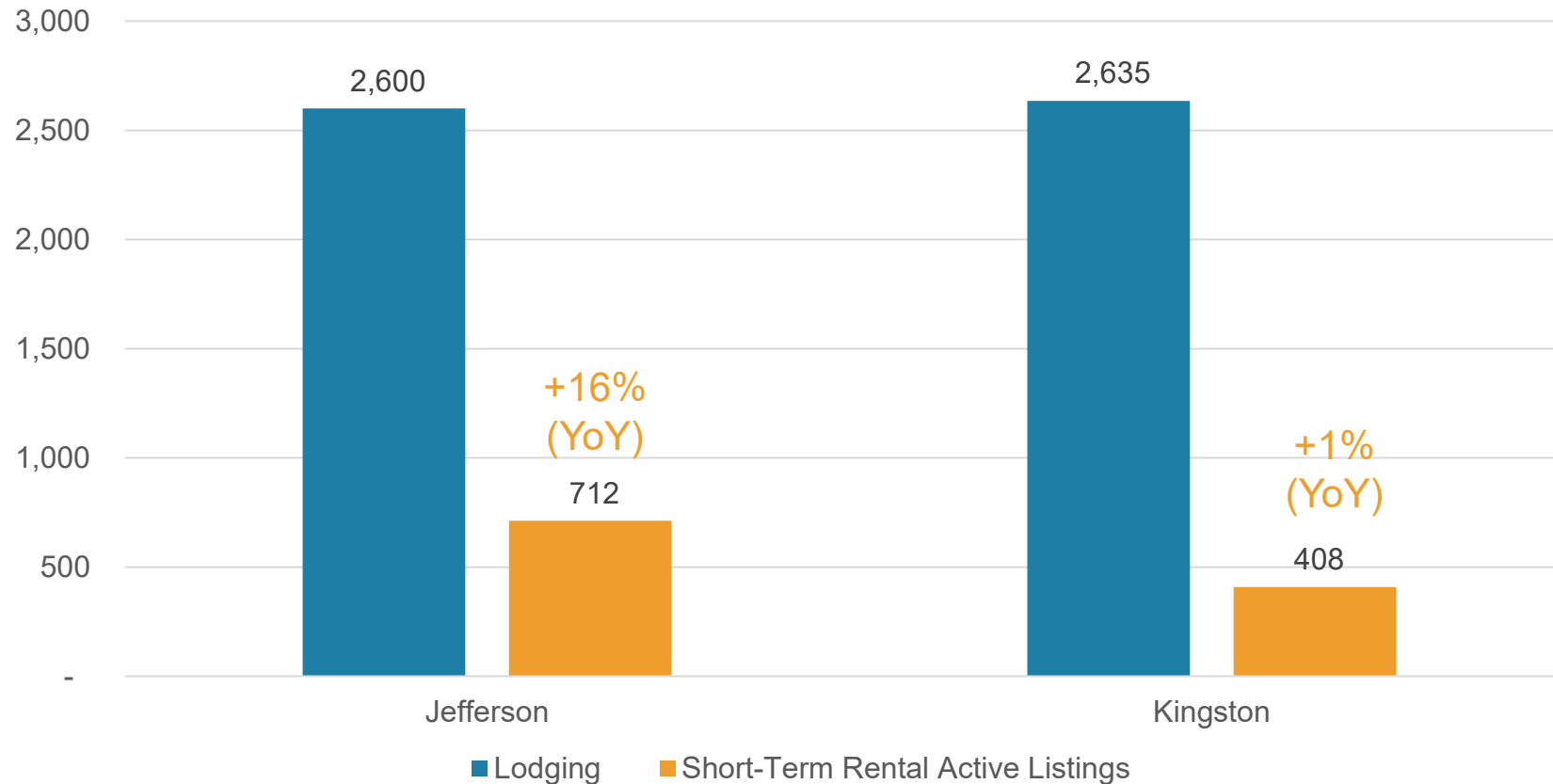


Average Length of Stay by Segment Jan - Sept 2024



Similar Lodging Supply

Lodging Supply

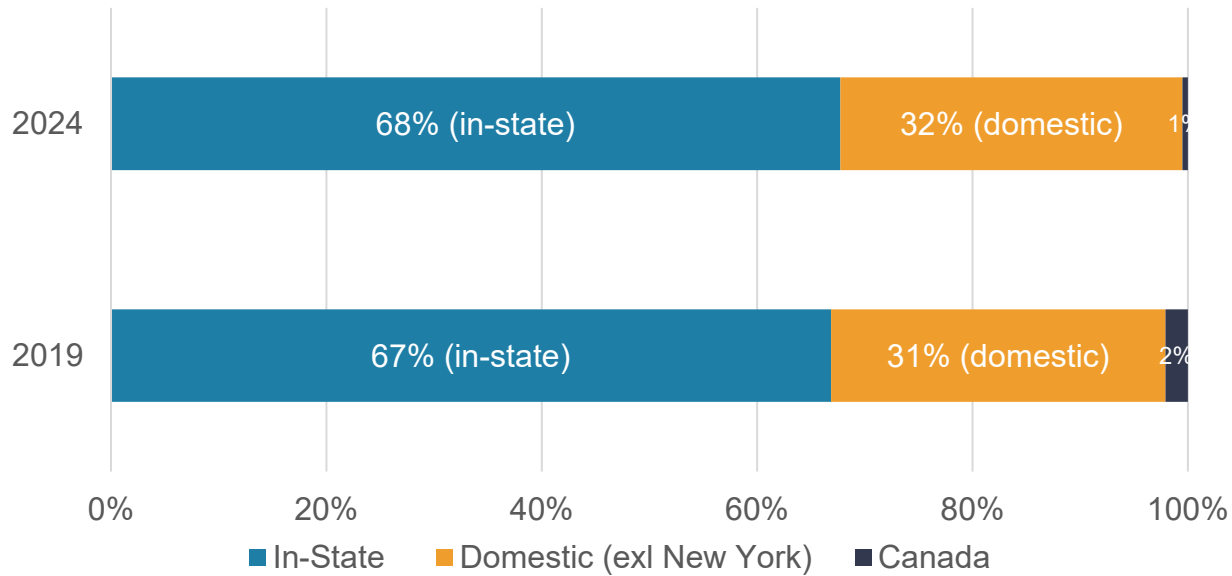


Kingston share of U.S. visitation is declining

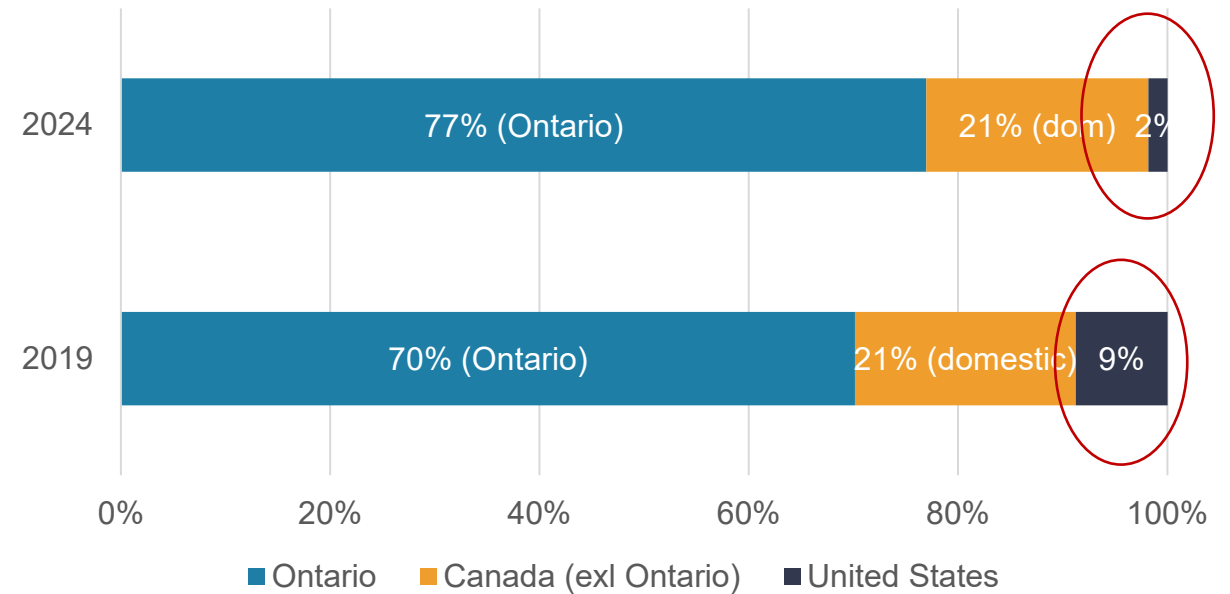
Despite favourable market conditions, Kingston is attracting proportionately fewer Americans.



Jefferson County Share of Mobile Devices



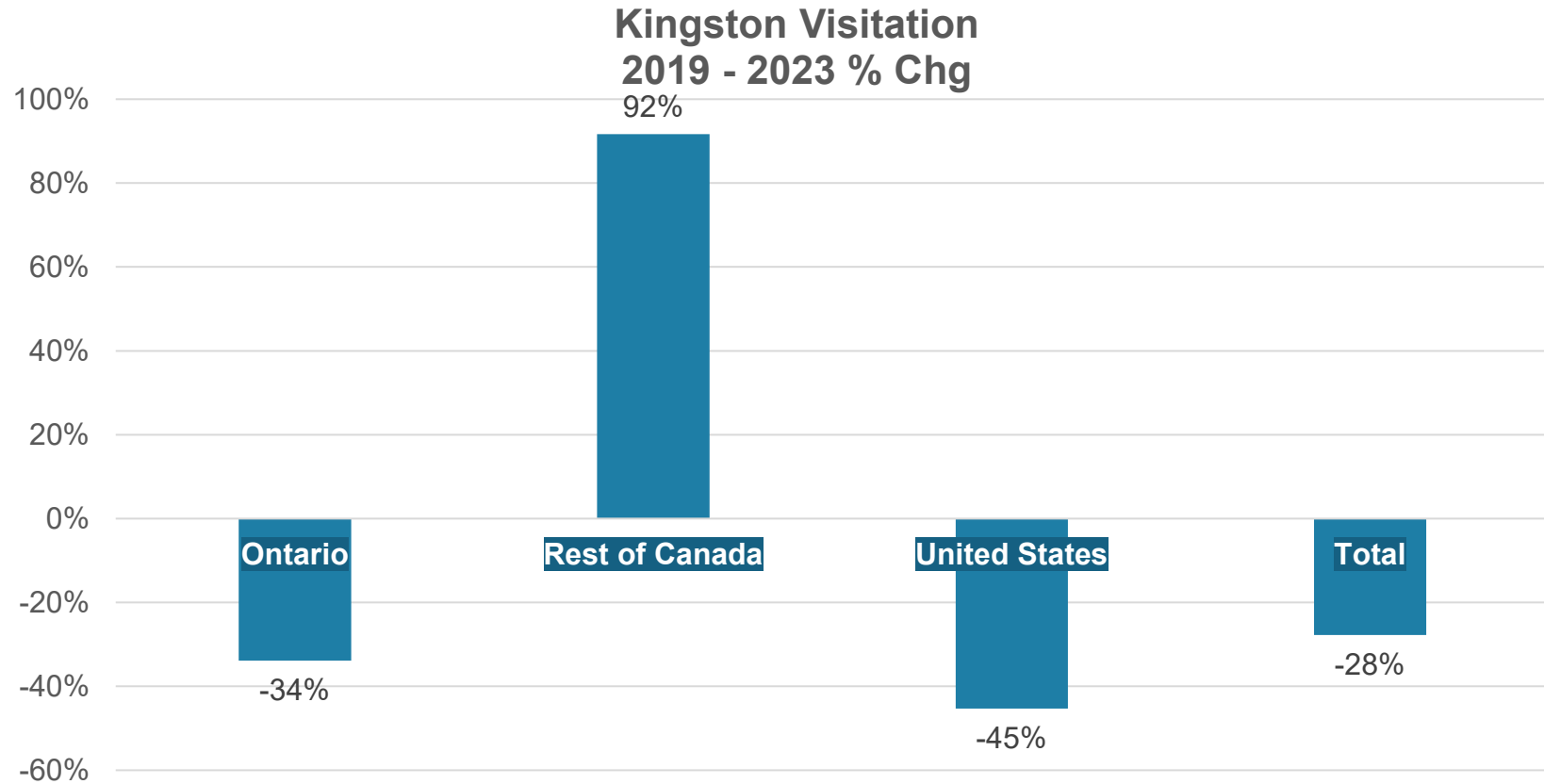
City of Kingston Share of Mobile Devices

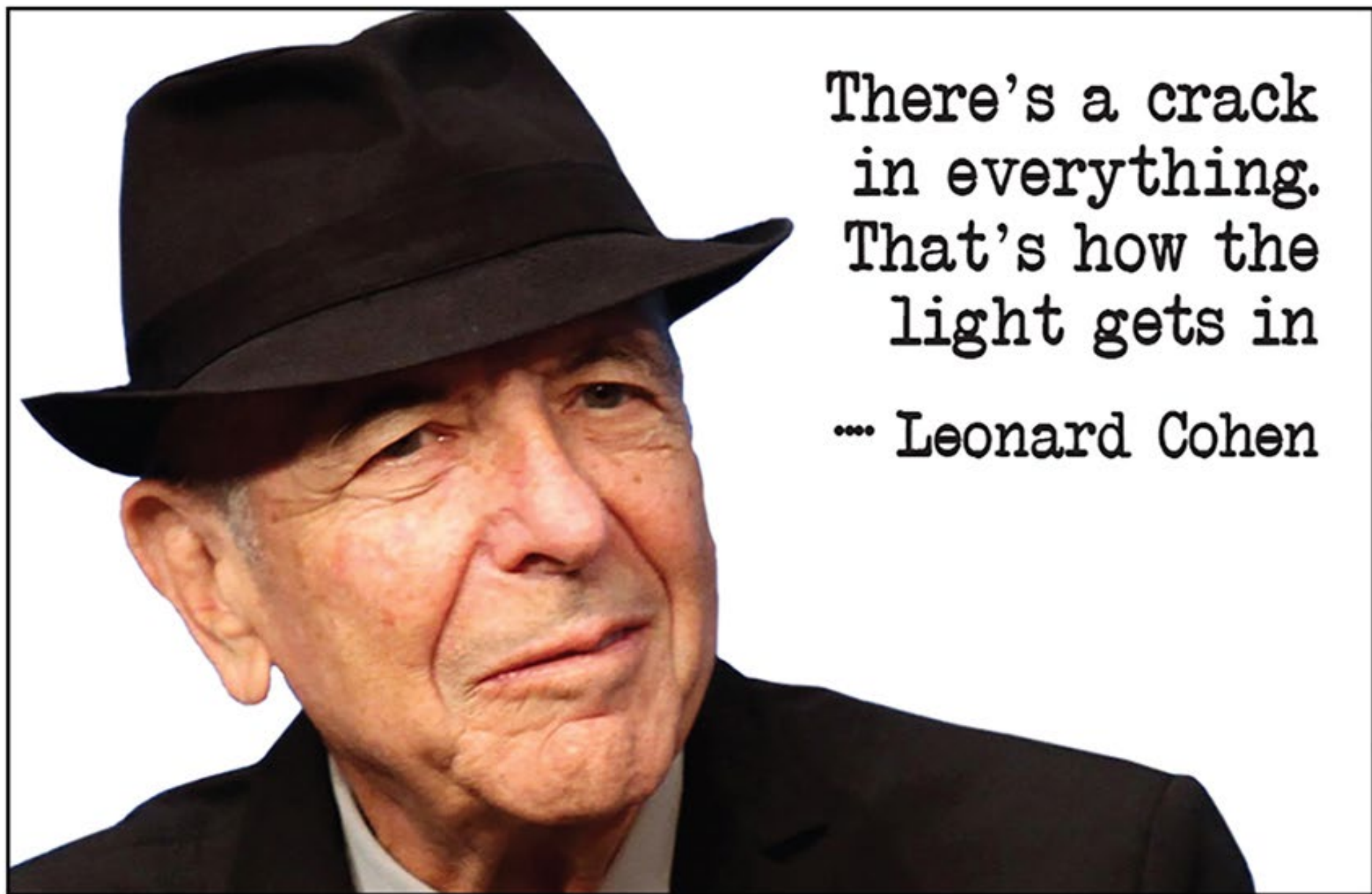


Source: Azira, Jan to Sept 2024

Kingston gaining domestic visitors – losing international

Total Visitation
2019 – 2.6 Million
2023 – 1.9 Million

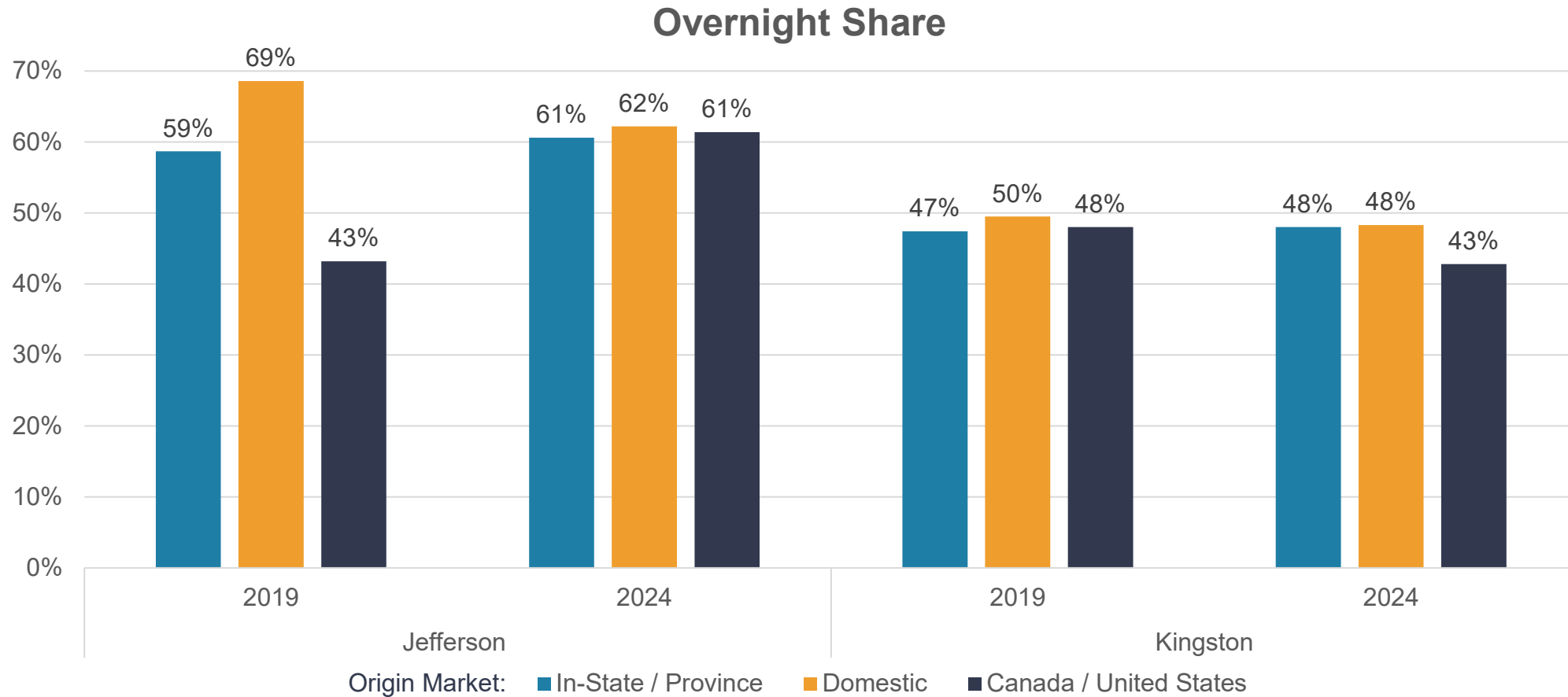




There's a crack
in everything.
That's how the
light gets in
... Leonard Cohen

Opportunity: We are an overnight destination

Approximately half of visitors to the region stay overnight.

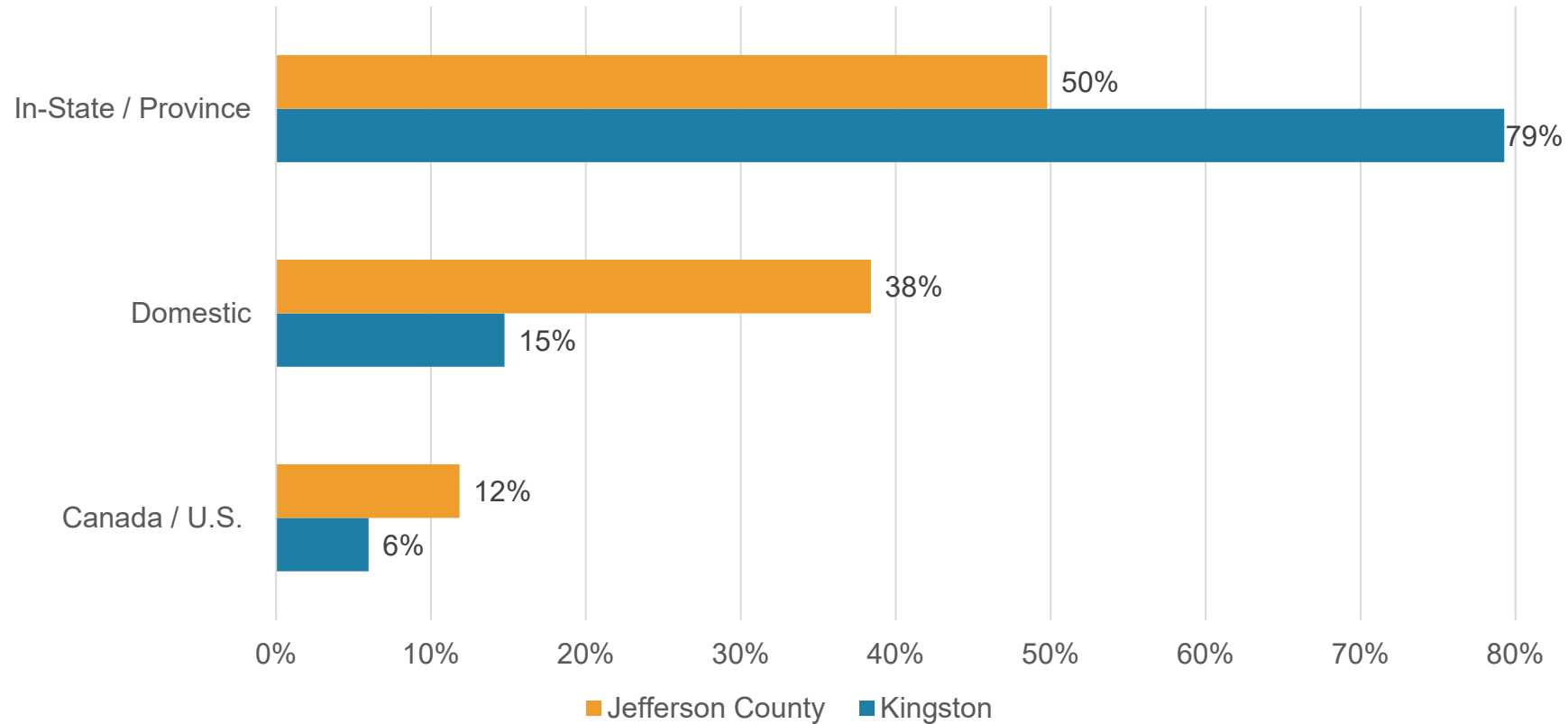


And with longer stays, visitors spend more.

Only 6% of Kingston's visitor revenues comes from American visitors.



Share of Total Spend (2023)



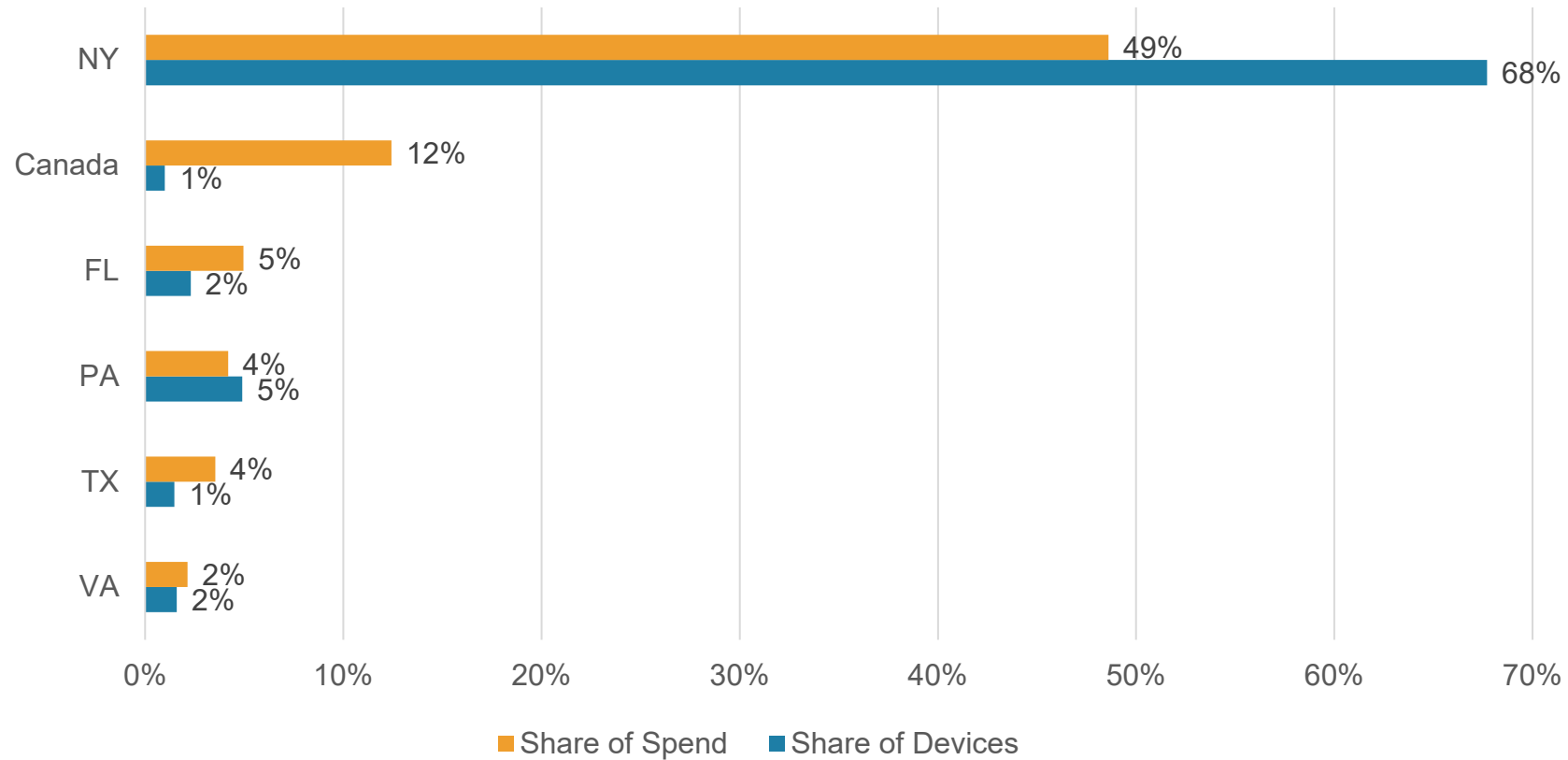
Source: Visa (Jefferson) and Ontario Ministry of Tourism, TREIM Model (Kingston)

Canada is good business for Jefferson County

12% of visitor spend in Jefferson is from CAN visitors, representing only 1% of total visitation.



Jefferson County Visitation (mobile devices) vs Spend Jan - Sept 2024

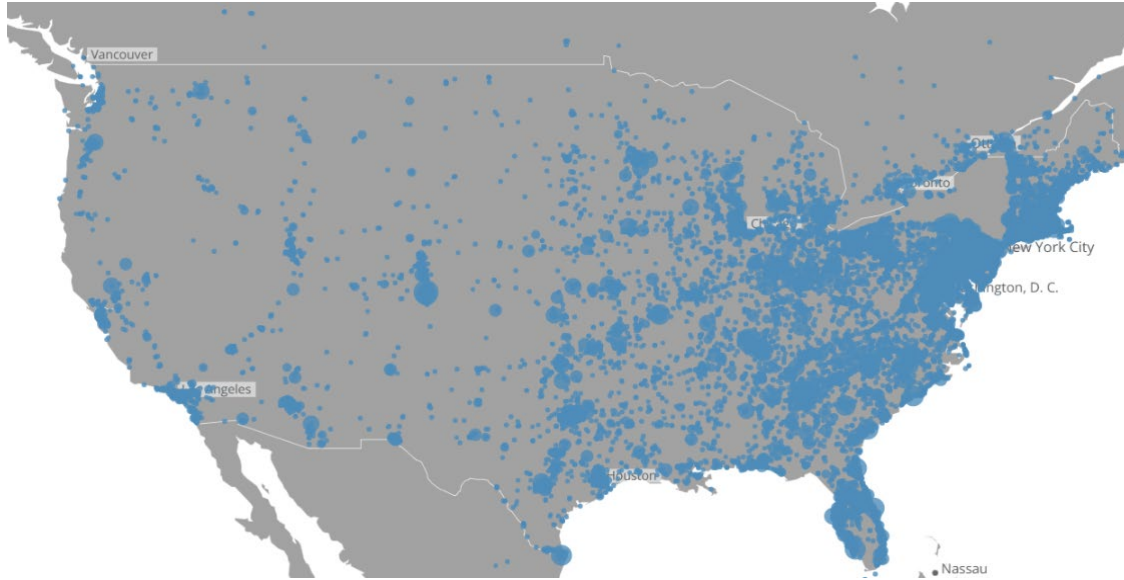


United States Target Opportunities

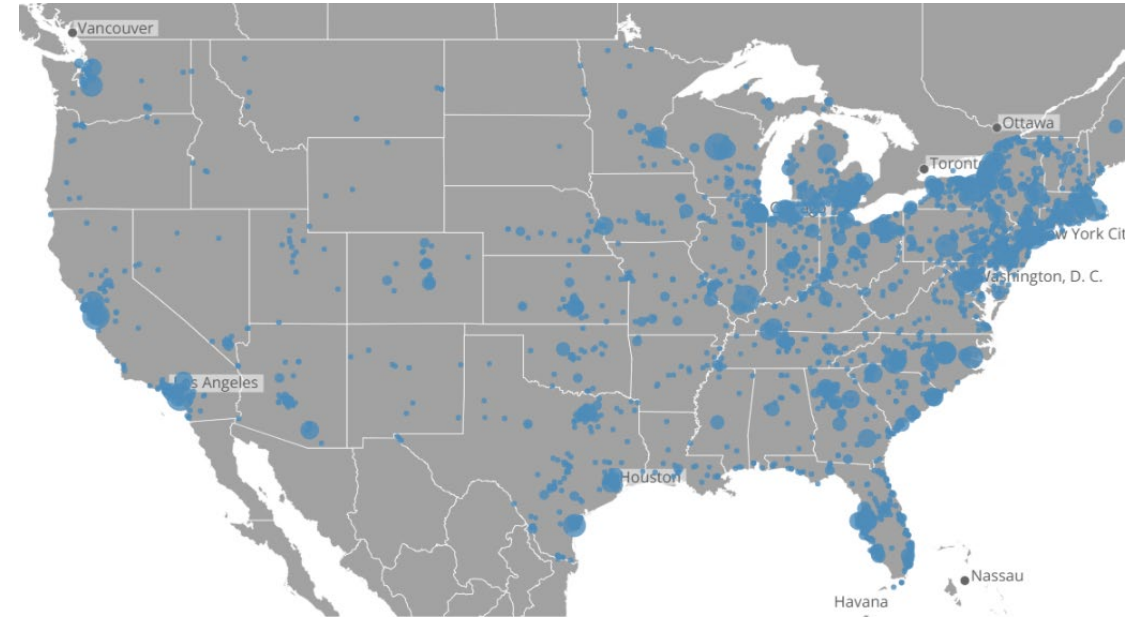
Visitors across the U.S. are visiting Jefferson County but NOT Kingston



Jefferson County – U.S. Out of State Visitors



City of Kingston – United States Visitors



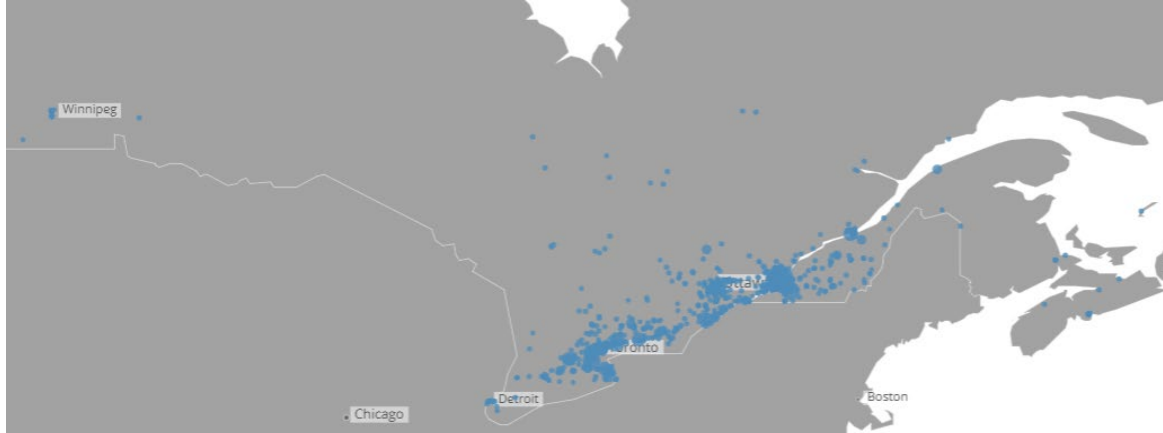
Source: Azira, Jan/Sept 2024, U.S. visitors arriving in Jefferson County outside New York State and City of Kingston

Canada Target Opportunities

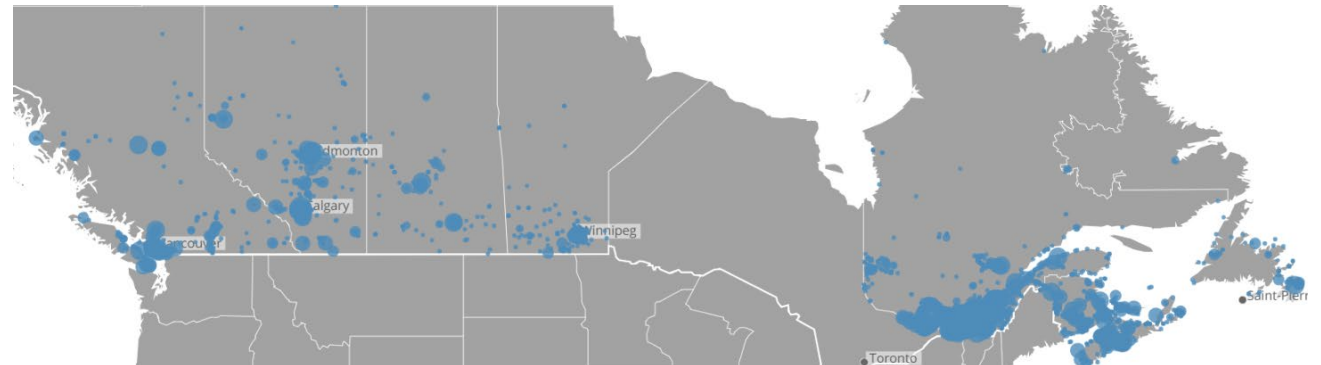
Visitors across Canada are visiting Kingston but NOT Jefferson County



Jefferson County – Canadian Visitors



City of Kingston – Canadian Outside Ontario



Opportunity – Increase Visitors Across Seasons

City of Kingston Lodging Occupancy Outperforming Jefferson County



Kingston Occupancy by Season

High Season: Occupancy

59.0%

↗ 1.6%

Shoulder Season: Occupancy

48.6%

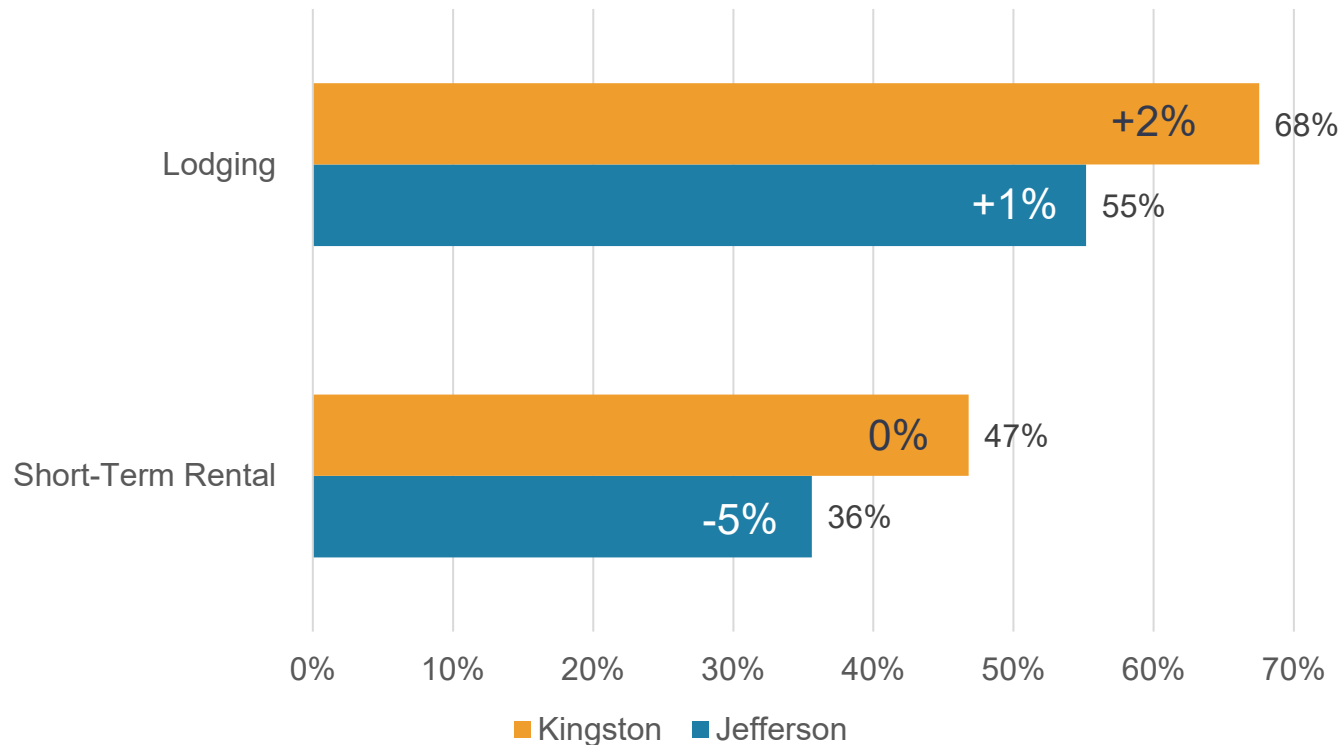
↗ 2.2%

Low Season: Occupancy

30.1%

↗ 3.5%

Occupancy 2024



Jefferson Occupancy by Season

High Season: Occupancy

42.5%

↘ -3.1%

Shoulder Season: Occupancy

19.2%

↗ 2.4%

Low Season: Occupancy

12.0%

↘ -28.9%

Opportunities and Recommendations

- There is a significant opportunity to tap into the Jefferson County visitor base to grow visitation in Kingston.
 - Spending upside
 - Proximity
 - External tailwinds
- Communicate the currency value benefit for Americans crossing the border – is the message getting through.
- Canadians like to spend across the border. Explore targeting Kingston source markets to encourage cross border visitation to Jefferson County and extend length of stay.
- Increase marketing collaboration and create shared cross border itineraries to encourage longer stays.
- Infrastructure to simplify visitor connection between Kingston and Jefferson County.
- Analyze and mitigate (post-pandemic) border-crossing hurdles.

Audience Q&A.



1 + 1 = 3

Stronger Together.