



ROCKPORT
ANALYTICS

ECONOMIC IMPACT OF VISITOR ACTIVITY IN KINGSTON, ONTARIO

2025 Economic Impact Assessment | August 2026



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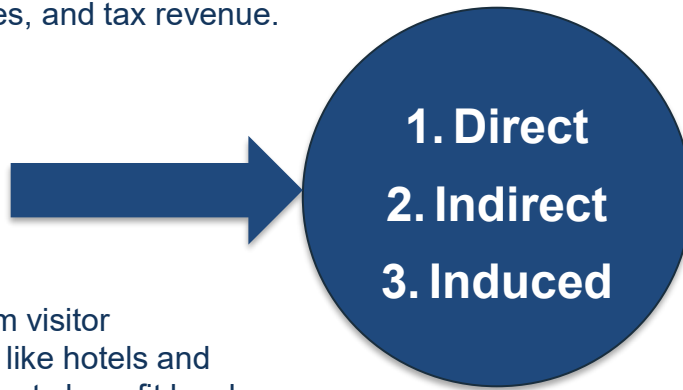
Study Overview & Methodology

Study Overview

This study, commissioned by the Kingston Destination Development Corporation, analyzes the economic impact of tourism in Kingston, Ontario Canada for 2025. Conducted by Rockport Analytics, it measures the contribution of visitors to the region's GDP, jobs, wages, and tax revenue.

Methodology

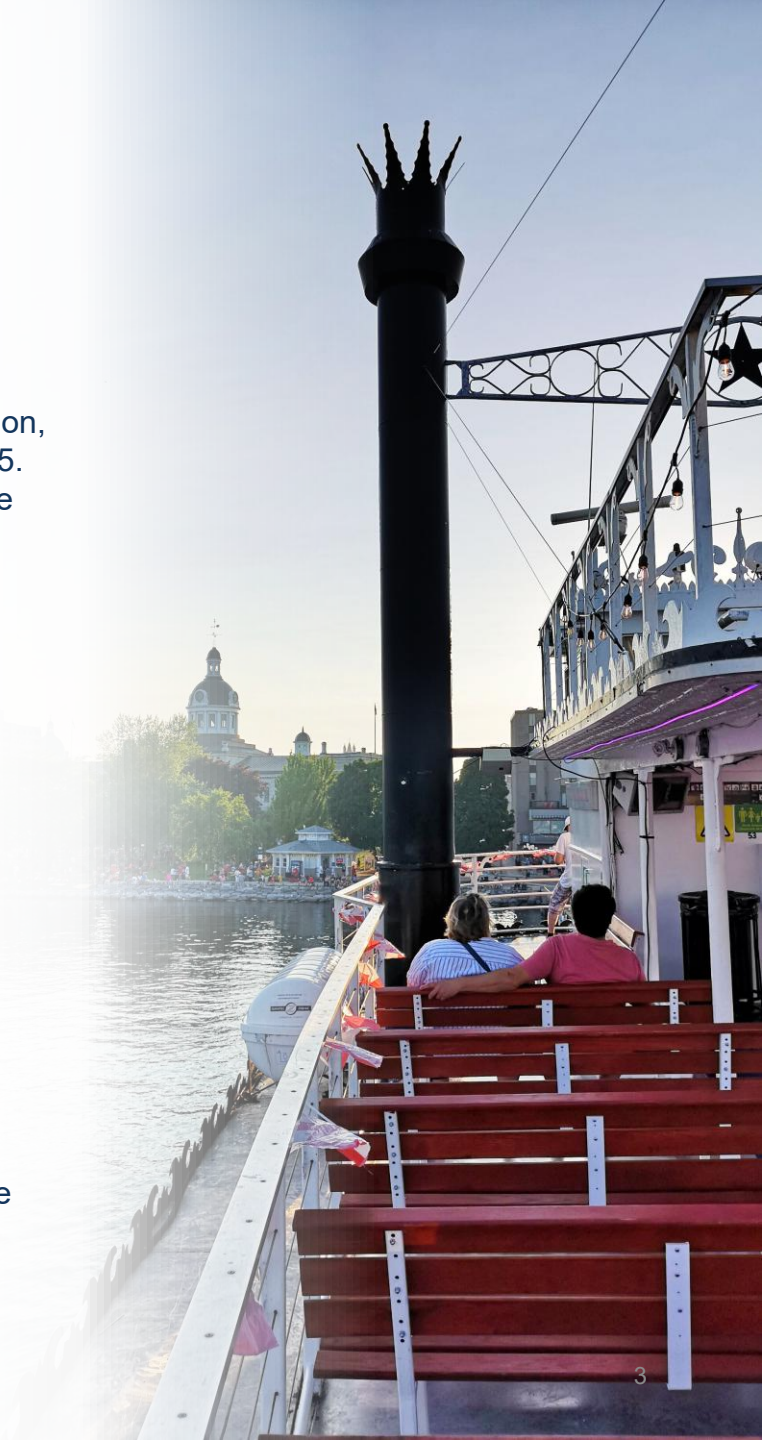
Tourism's economic impact is divided into three parts:



Direct impacts come from visitor spending on businesses like hotels and restaurants. Indirect impacts benefit local suppliers to those businesses.

Induced impacts occur as tourism wages are spent throughout the economy.

An economic model of Kingston is critical to estimating how traveler spending resounds through the provincial and county-level economies. Rockport Analytics has combined local economic data with the TREIM model for Kingston to conduct the impacts. The TREIM model is critical to measuring the direct, indirect and induced impacts of visitation to the region.



Study Overview & Methodology

Methodology (Continued)

TREIM also measures how much of each tourism dollar remains in the region's economy. Total traveler spending generally exceeds the direct impact of tourism. This is because not all goods and services purchased by travelers are supplied by firms located in Kingston. The TREIM model accounts for these import "leakages"² to suppliers located outside of the area. Generally, the more diversified an area's economy, the lower are import leakages and the higher the retention and multiplier of visitor spending.



2025 Kingston Tourism Highlights



2.65 M

Visitors

Volume Growth 2.8%

Day 53% Overnight 47 %



\$538.9 M

Visitor Spending

Spending Growth 5.3%

Average Spend/Trip \$203



\$162.1 M

Total Initiated Taxes

Total Initiated Tax Growth 4.9%

Federal: \$64.6 M
Provincial \$72.7 M
Local: \$24.8 M



4,400

Total Kingston Jobs Supported

(Full & Part-Time)

Employment Growth 2.0%



\$215.4 M

Total Wages & Salaries Paid

Wage Growth 5.7%



\$373.7 M

Total Economic Contribution

(Value Added)

Impact Growth 5.8%

2025 Kingston Tourism Highlights

Tourism and Impact

\$538.9 Million
Tourism Spending

\$225.9 Million
Food & Beverage

\$47.6 Million
Shopping

\$80.7 Million
Transportation

\$48.8 Million
Entertainment and
Recreation

\$135.8 Million
Lodging

\$373.7 Million
Total Economic
Impact

\$267.5 Million
Direct

\$41.0 Million
Indirect

\$65.2 Million
Induced



Jobs and Wages

4,401
Total Traveler
Spending
Supported Jobs

3,710
Direct Jobs

325
Indirect Jobs

365
Induced Jobs

**\$149.4
Million**
Total Wages



Tax Revenue Generated

\$64.6 Million
Total Federal
Tax

\$72.7 Million
Total Provincial
Tax

\$24.8 Million
Total Municipal
Tax



2025 Kingston Tourism Highlights:

Key Metrics

1

Visitation reaches 2.65 million in 2025

Kingston welcomed 2.65 million person-trips in 2025 (+2.8% YoY). Visitation growth was led by growth in day visitation (+3.8%).

2

Stronger spending and higher average spend-per-trip

Visitor spending increased 5.3% to \$538.9 million. Average spend per visitor rose from \$198 to \$203. Growth was driven by key categories including transportation, retail shopping, and food & beverage.

3

Tourism remains a major economic driver

Travel & tourism contributed \$373.7 million to Kingston's economy in 2025. Visitor-serving businesses such as hotels, restaurants, and attractions generated \$267.5 million in direct value, with the remaining \$106 million coming from supply-chain and household spending. Importantly, 69 cents of every visitor dollar stayed in Kingston, supporting wages (40 cents) and provincial/local tax revenues (18 cents).

4

Employment pushes past 4,400 jobs

Tourism activity supported more than 4,400 jobs, a 2.0% increase. Employment growth in the sector matched the pace of Kingston's broader economy, keeping tourism ranked as the 10th-largest employer in the region—responsible for nearly 4% of all nonfarm jobs.

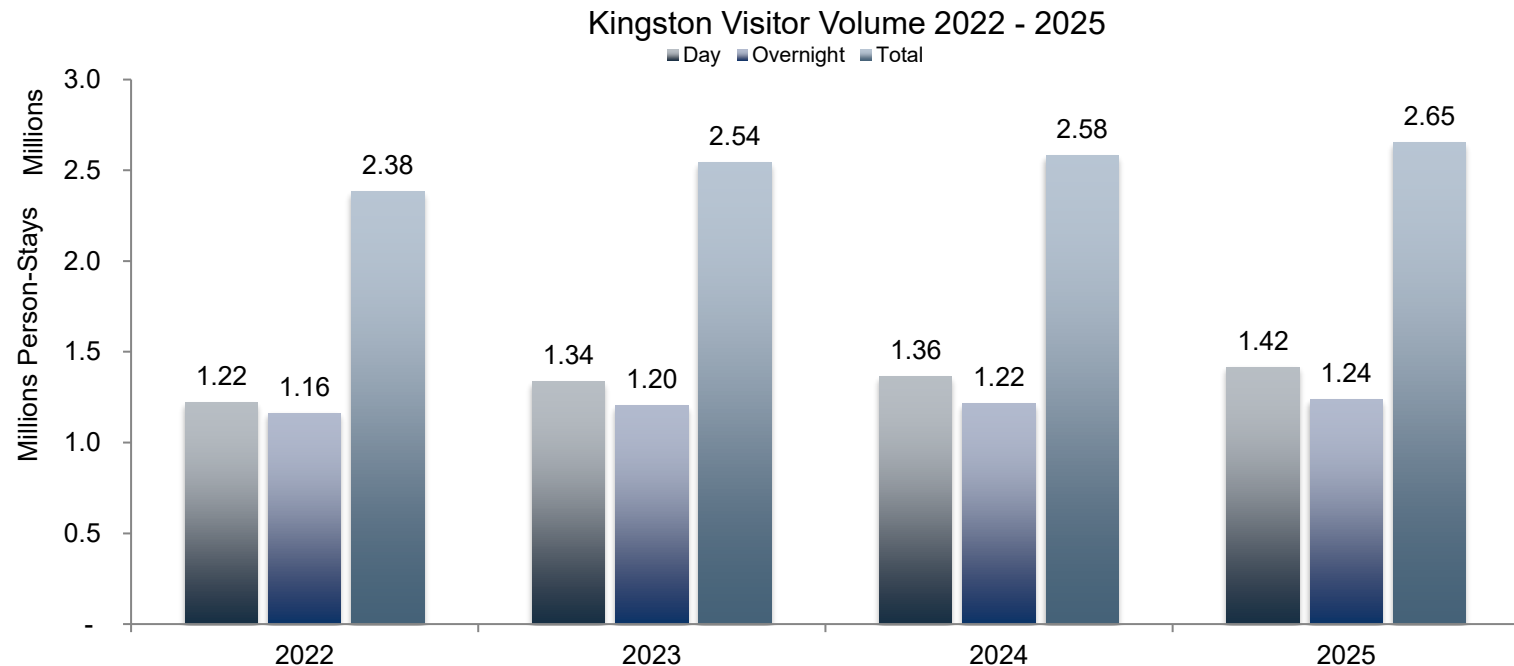
5

Growing fiscal benefits

Visitor activity generated \$162 million in total tax revenue in 2025 (+4.9% YoY). Provincial and local tax collections reached \$97.5 million, including \$72.7 million to Ontario and \$24.8 million to local governments. Without tourism-driven revenues, Kingston households would each owe an additional \$1,325 annually to maintain current public services.

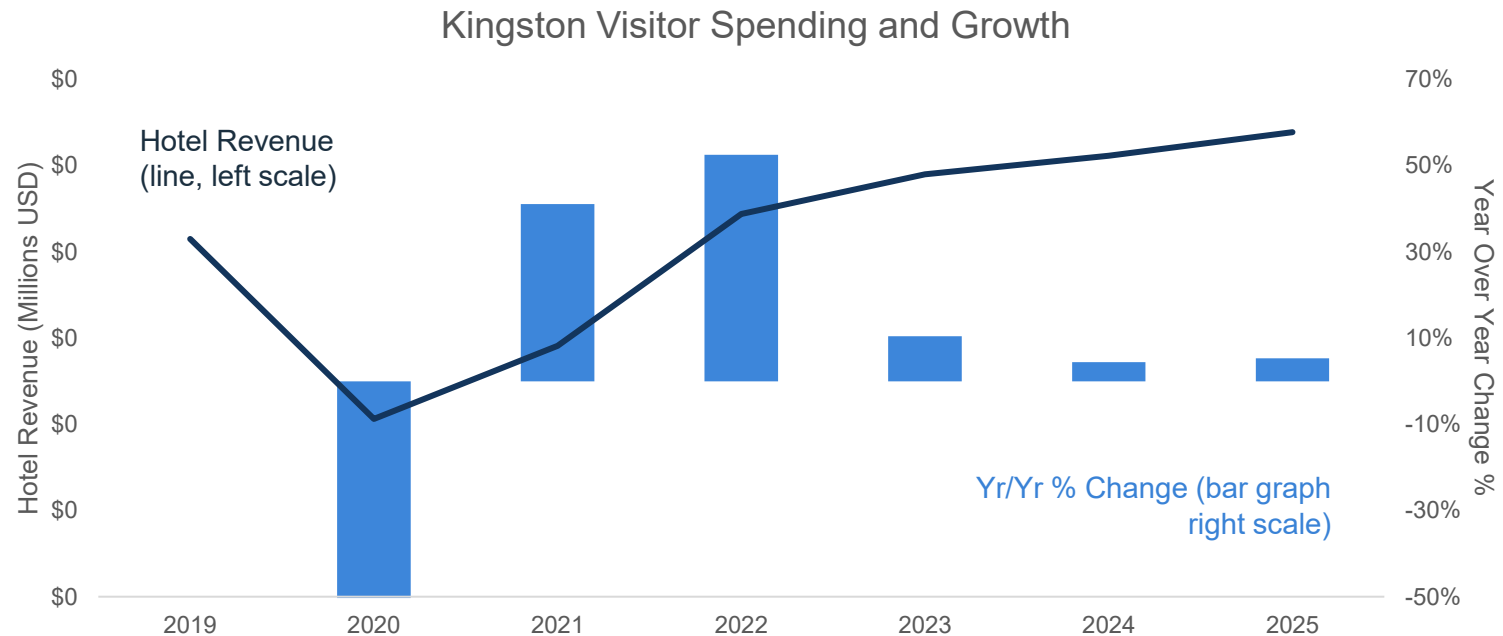
Kingston Visitor Volume Reaches 2.65 Million in 2025

Kingston's visitor county reached 2.65 million in 2025, growing 2.8% and increasing by 73,000 visitors. Growth was supported by day visitation growth, day visitation increasing by 3.8% compared to overnight visitor growth of 1.7%.



Kingston Visitor Spending Increased 5.3%, nearing \$540 Million in 2025

Kingston's tourism industry saw visitors spending \$538.9 million on goods and services in Kingston, a 5.3% increase over the previous year. The growth in spending was spread equally over an increase in visitation and increase in per-visitor spending.

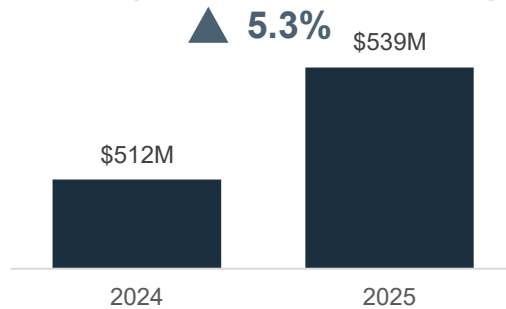


Visitor Spending in Kingston, Ontario

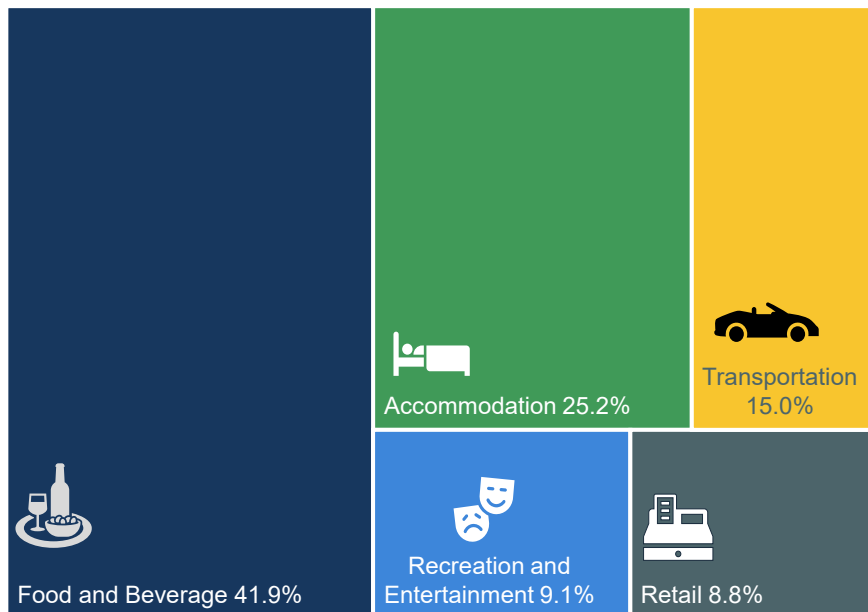
	2019	2020	2021	2022	2023	2025	2025
Visitor Spending (millions)	\$415.10	\$206.20	\$291.00	\$443.90	\$490.10	\$511.70	\$538.90
Growth Rate		-50.3%	41.1%	52.5%	10.4%	4.4%	5.3%

Kingston Visitor Spending by Category

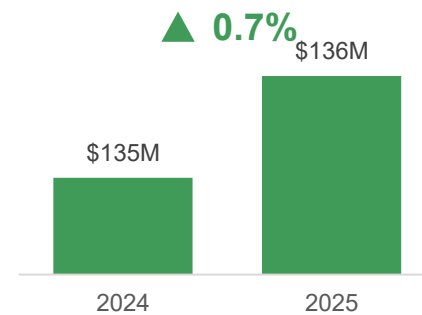
Kingston Total Spending



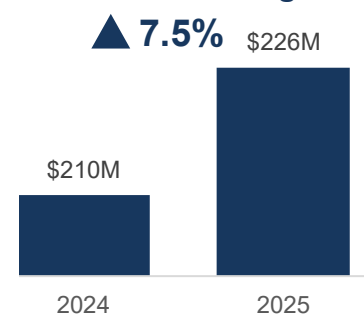
Share of 2025 Kingston Visitor Spending By Category



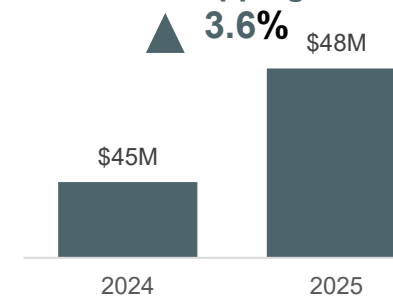
Lodging



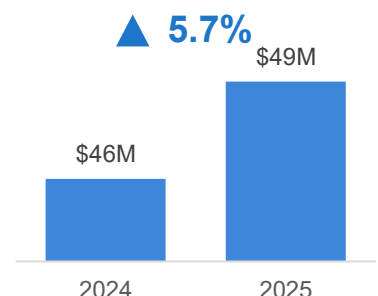
Food & Beverage



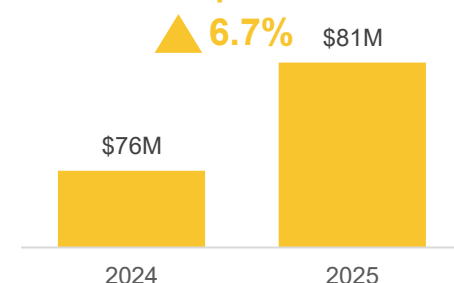
Shopping



Entertainment



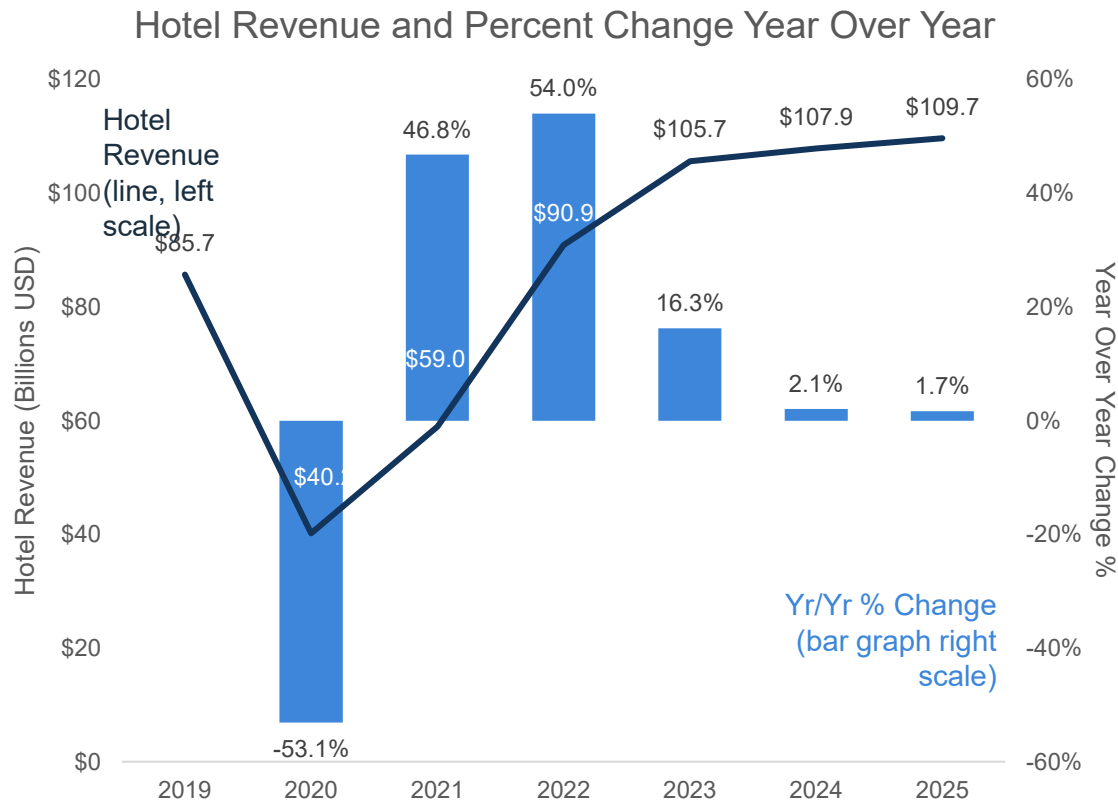
Transportation



Source: Longwoods International, NTTO, Reach Market Planning, STR, BTS, AirDNA, Rockport Analytics

Kingston Hotel Revenue Nears \$110 Million

Kingston hotel room revenue rose 1.7% in 2025, nearing \$110 million. Occupancy fell as supply growth outpaced demand growth.

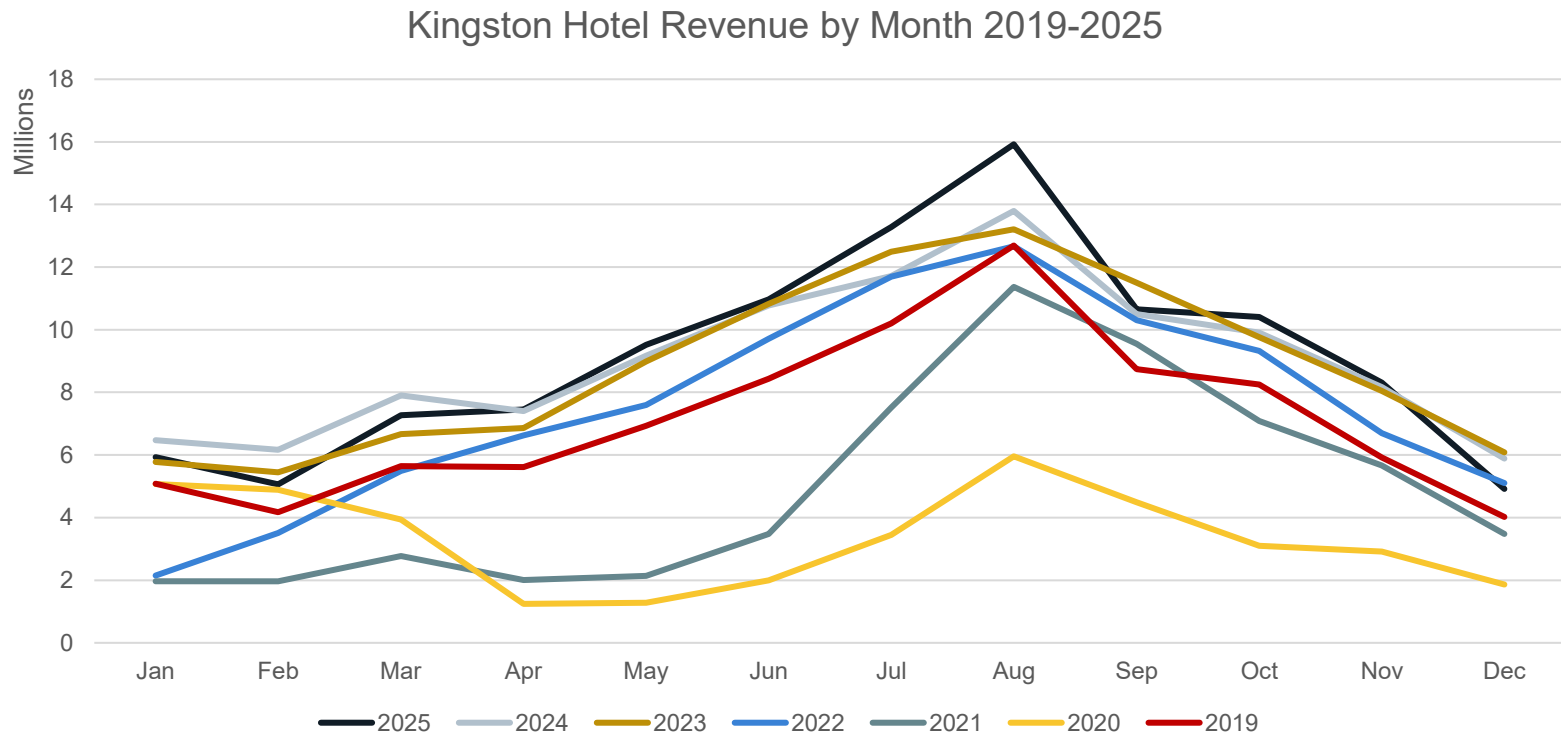


Hotel Metric	2025	25/24 Growth
Demand	642K	3.1%
Supply	1.03M	8.4%
Occupancy	62.4%	-4.9%
ADR	\$175	1.0%
RevPAR	\$109	-3.9%
Revenue	\$109M	4.2%

Monthly Hotel Revenues

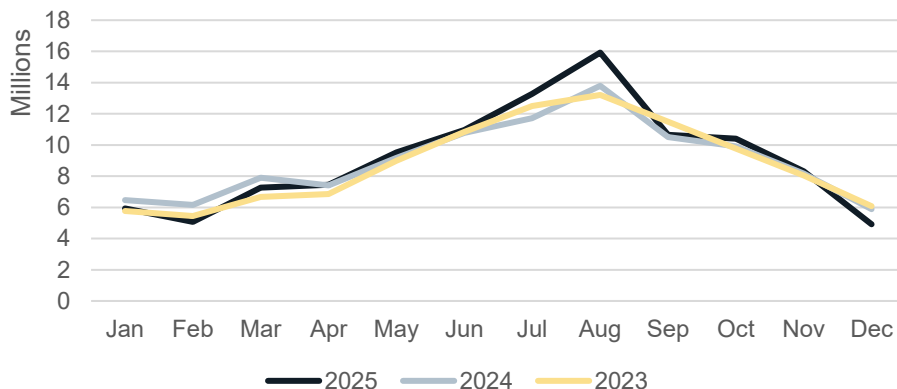
Hotel revenues hit a post-pandemic high in August of 2025, reaching nearly \$16 million. Growth in the summer months was strong, with both July and August increasing by more than 10%.

Kingston sees nearly 65% of all hotel revenues in the six-month period from May to October.



Strong Summer Season Offset by Struggles in Offseason

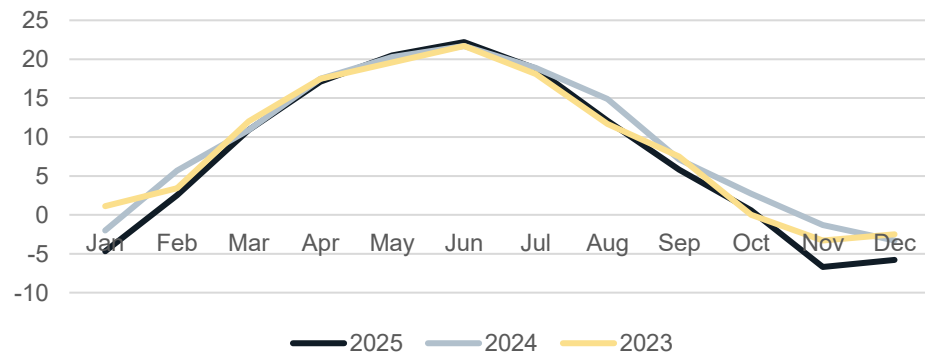
Kingston Hotel Revenue by Month 2023-2025



Kingston hotels had an excellent summer, with revenue increasing by more than 13% in both July and August but struggled in the off-season. Hotel revenues fell by more than 8% in each of the first three months of 2025, led by February's drop of 18%. Of course, 2024 was a leap year so some of the drop can be explained by the extra day in February of 2024. Revenue in December of 2025 fell 16%.

Weather may have played a part in the decline. While most months of 2025 saw temperatures consistent with previous years, temperatures in January, February and December were noticeably colder in 2025 than in other recent years.

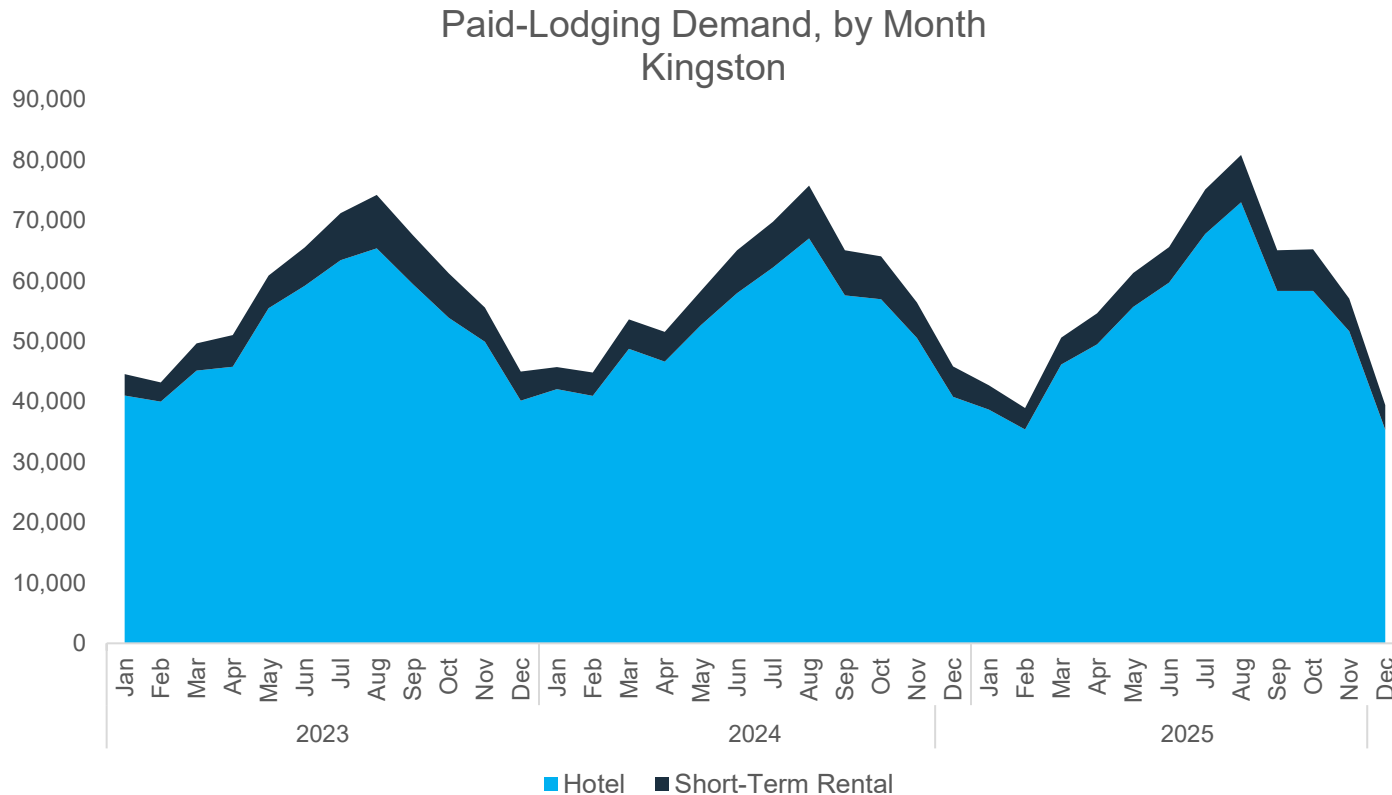
Kingston Average Temperature by Month 2023-2025



Monthly Lodging Demand

Paid room demand (including both commercial lodging like hotels and short-term rentals like AirBnB/VRBO) reached 696,000 in 2025, an average of over 1,900 rooms per day. Lodging demand peaked at over 80,800 in August, an increase of over 5,000 over August 2024. Demand fell in the offseason with December 2025 6,400 rooms below December 2024 demand. While demand in February fell, it must be remembered that 2024 was a leap year – meaning an extra day for February 2024.

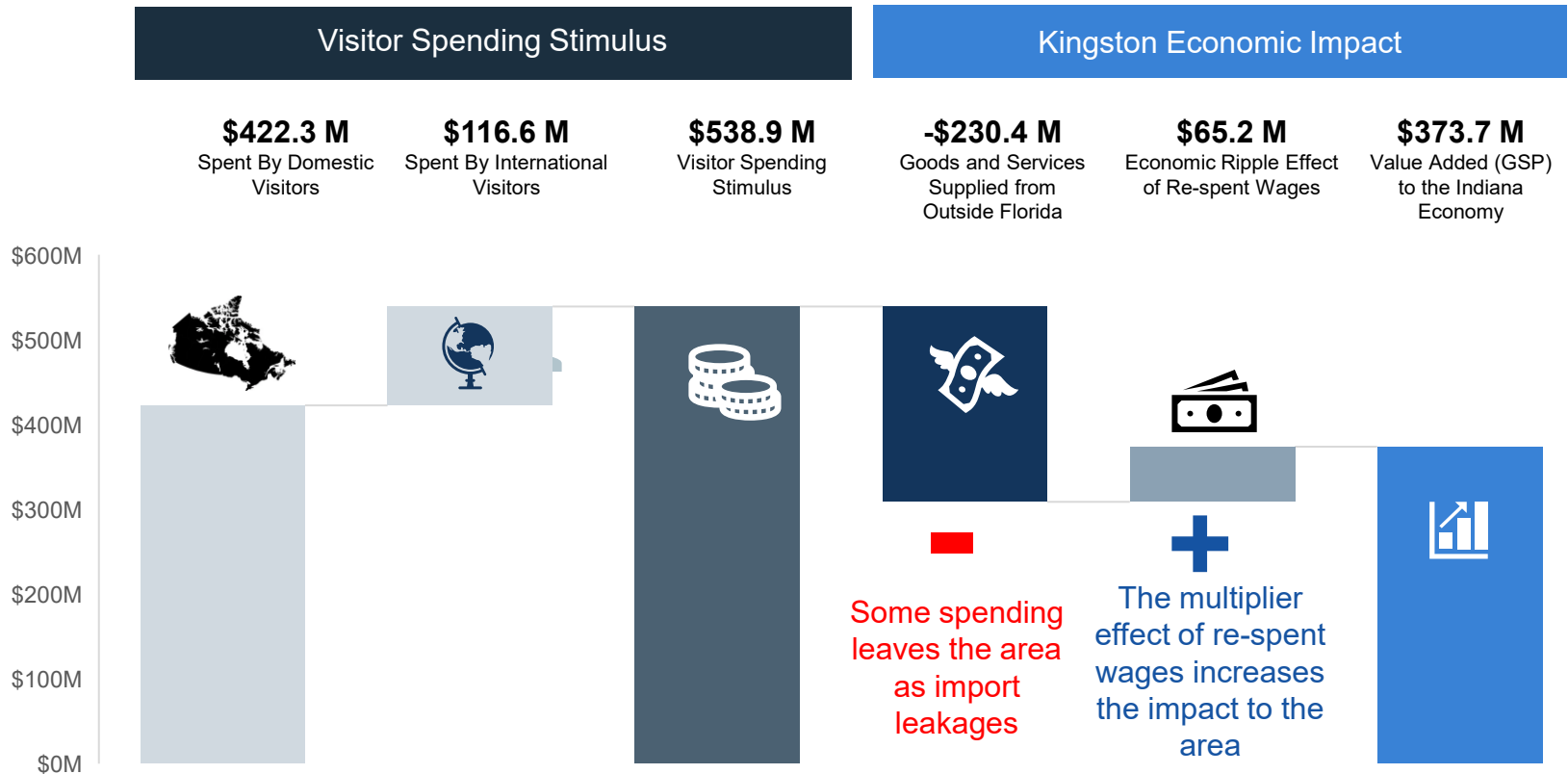
Short term rental captures the largest share of room demand in September and October, although that share has fallen from 12% of paid room demand in 2023 to around 10.5% in 2025.



Kingston Generates \$539 Million in Visitor Spending, Resulting in \$374 Million Value Added

In 2025, visitors spent \$539 million (an increase of \$27 million over 2024), Additionally, \$65.2 million in wages earned by Kingston employees was re-spent locally.

However, not all of this money stayed in Kingston. Approximately \$230 million was spent on goods and services sourced from outside the region. Ultimately, tourism generated a net economic impact of \$373.7 million on Kingston's Gross Regional Product (GRP).

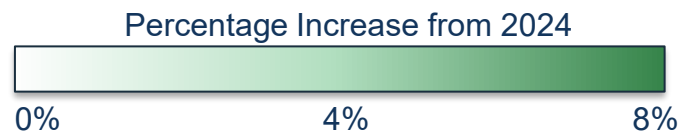


Kingston's Tourism's Bottom Line

2025 Economic Impact Summary

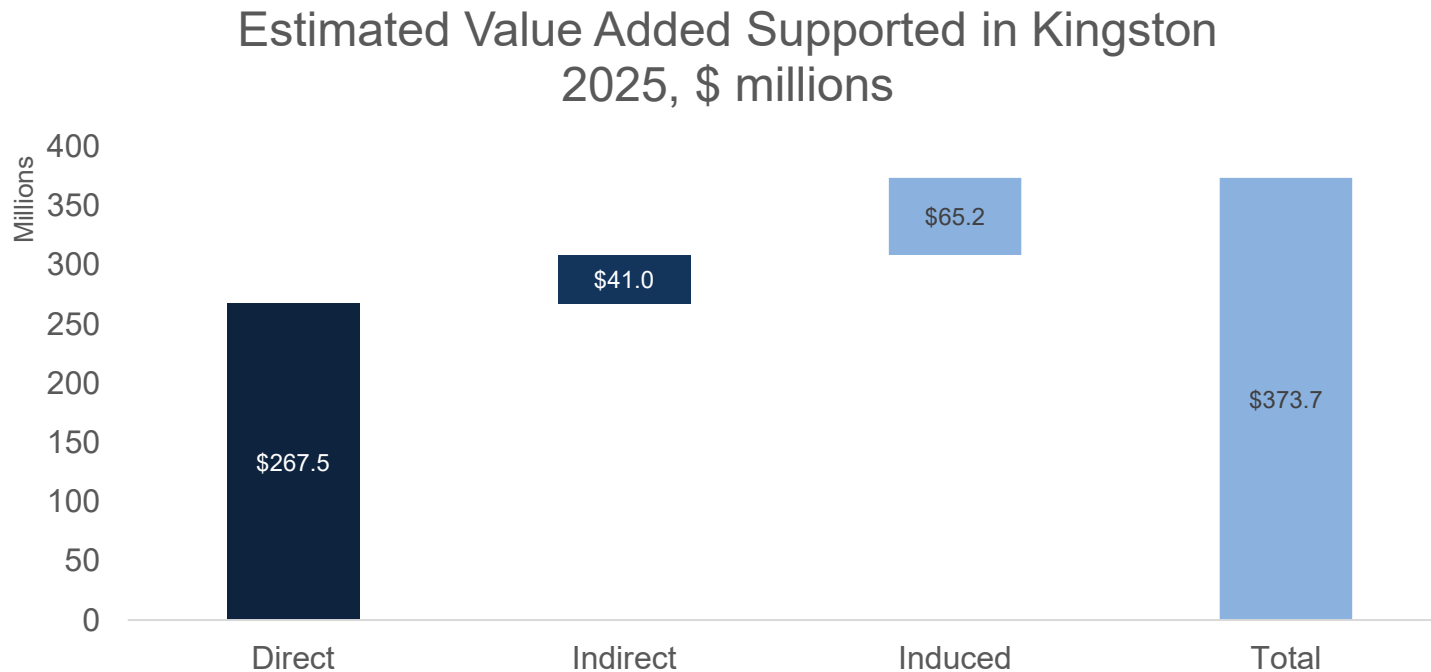
Metric	Direct	Indirect	Induced	Total	% vs. 2024	Difference from 2024
Total Visitor Volume				2.65M	2.8% ↑	73K
Total Tourism Spending				\$538.9M	5.3% ↑	\$27.2M
Economic Impact (GRP)	\$267.5M	\$40.9M	\$65.2M	\$373.7M	5.8% ↑	\$20.5M
Wages	\$149.4M	\$26.9M	\$39.1M	\$215.4M	5.7% ↑	\$11.6M
Jobs	3,710	325	365	4,401	2.0% ↑	88
Tax Receipts				\$162.1M	4.9% ↑	\$7.5M
Federal				\$64.6M	5.2% ↑	\$3.2M
Provincial				\$72.7M	4.9% ↑	\$3.4M
Local				\$24.8M	4.0% ↑	\$946K

Sources: Longwoods International, NTTO, Reach Market Planning, STR, BTS, AirDNA, Rockport Analytics, TREIM



Tourism in Kingston Contributed \$374 Million to Local Economy in 2025

Kingston Tourism: 2025 Economic Impact (Value Added/GRP)



Sources: TREIM, Rockport Analytics

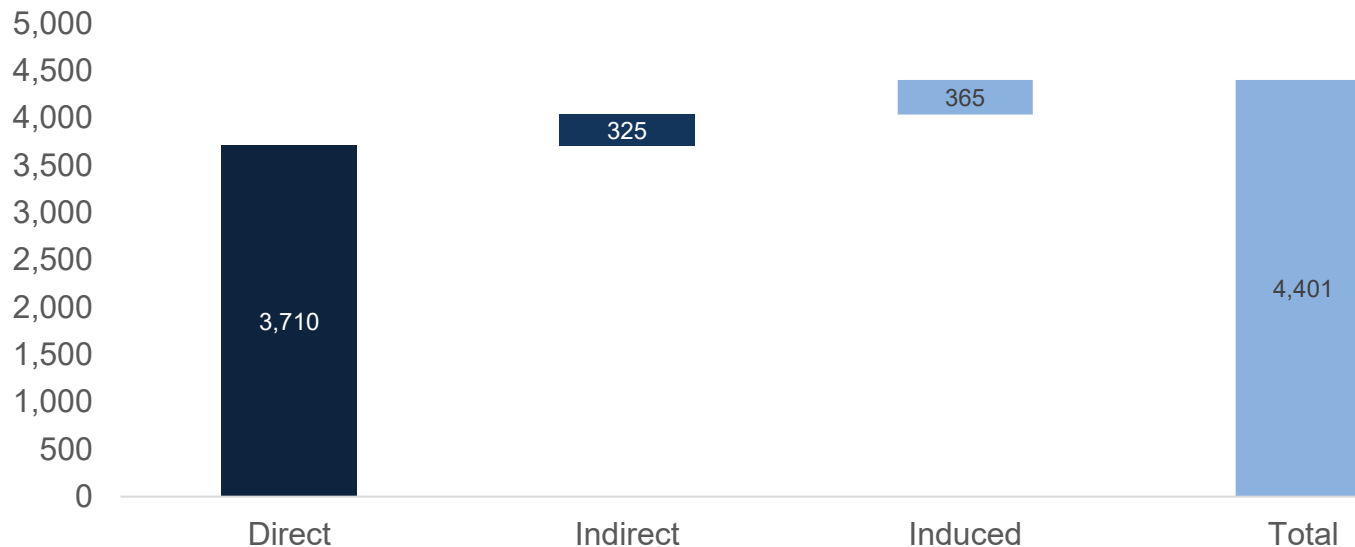
In 2025, Kingston tourism generated a total economic impact of \$374 million, marking a 5.8% increase over the previous year.

Businesses serving visitors directly contributed \$267.5 million, while related upstream and downstream businesses added another \$41 million.

Kingston Tourism Was Responsible for more than 4,400 Jobs in the Kingston Area

Kingston Tourism: 2025 Economic Impact (Employment)

Estimated Employment Supported in Kingston
2025



Kingston tourism employment rose 2.0% over 2024, reaching a total of 4,401 jobs.

Direct employment also grew 2.1%, totaling 3,710 jobs with an additional 691 jobs supported by related upstream and downstream businesses.

Kingston tourism's support of over 4,400 jobs is 4.6% of all employment in the Kingston metropolitan area in 2025.

Tourism Holds Its Rank as Kingston's 10th Largest Employer in 2025

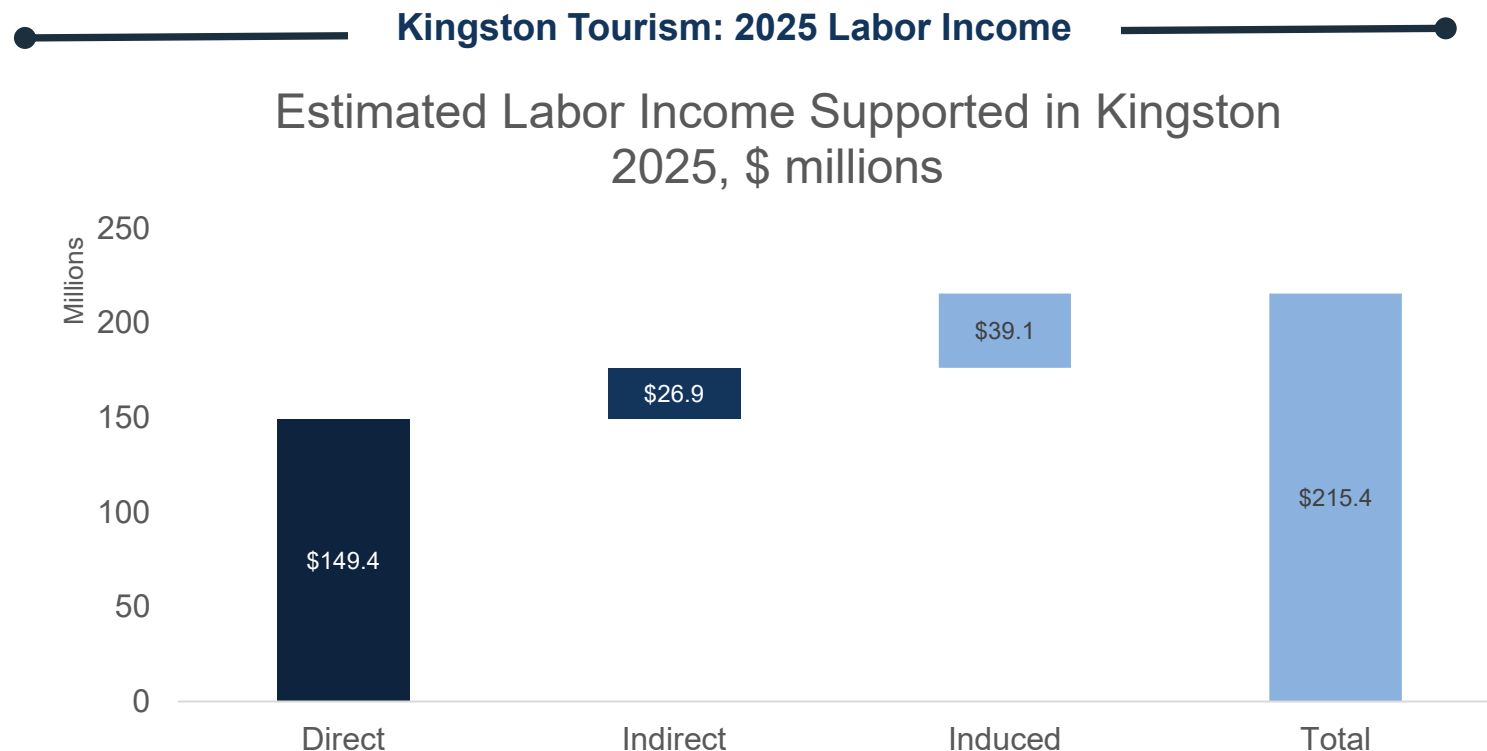
2025 Tourism in Kingston: Ranking of Major Industries By Total Employment

Rank	Industry Sector	Employment	Employment Share
1	Health care and social assistance	17,542	18.5%
2	Wholesale and retail trade	13,542	14.3%
3	Educational services	13,050	13.7%
4	Public administration	8,283	8.7%
5	Accommodation and food services	7,175	7.6%
6	Manufacturing	6,008	6.3%
7	Construction	5,933	6.2%
8	Professional, scientific and technical services	5,725	6.0%
9	Finance, insurance, real estate, rental and leasing	4,942	5.2%
10	Tourism	3,710	3.9%
11	Information, culture and recreation	3,108	3.3%
12	Transportation and warehousing	3,025	3.2%
13	Other services (except public administration)	2,967	3.1%
14	Business, building and other support services	2,608	2.7%
Kingston Employment		94,958	

* 2025 Reported: As released by the Statistics Canada for the Kingston Metropolitan Area

Kingston's Tourism Economy Generated \$215 Million in Paid Wages in 2025

Wages for direct tourism workers in Kingston reached \$150 million in 2025, reflecting a 5.8% increase from 2025. Additionally, employees within Kingston's tourism supply chain received \$27 million in wages (indirect impact), while another \$39 million in wages was generated from the re-spending of both direct and indirect tourism wages (induced impact).



Sources: TREIM, Rockport Analytics

Tourism Drives
Significant Revenue
for Both **Provincial**
and **Local**
Governments

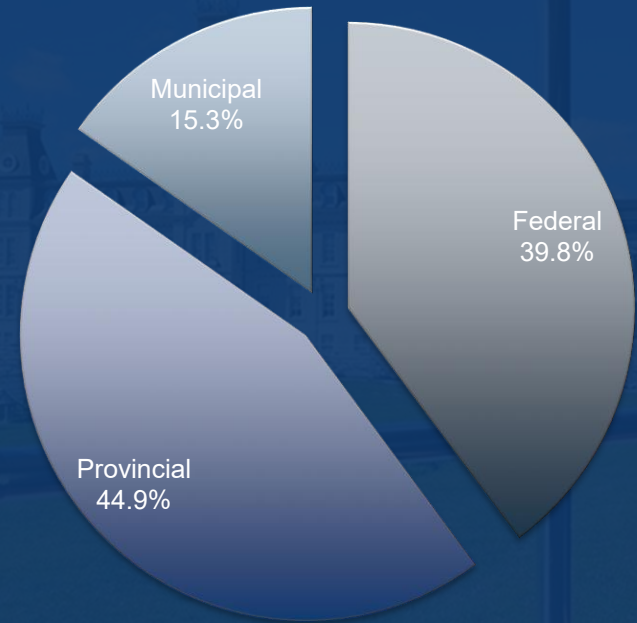
\$72.7 Million
Provincial
Taxes

\$24.8 Million
Local Taxes

Kingston Tourism Activity Brought \$162 Million to all Levels of Government

Of the \$162 million in tax revenue generated by visitor activity in Kingston, the Province of Ontario received 45% - \$72.7 million. The Canadian federal government received \$64.6 million with local governmental authorities receiving \$24.8 million in 2025.

2025 Tourism Tax Sources* Total = \$162.1 Million



Sources: TREIM, Rockport Analytics

Putting the Benefits of Kingston Tourism in Perspective



Tourism Effects on the Job Market

Kingston tourism was responsible for one-in-25 of all Kingston non-farm jobs. In 2025, tourism maintained its 10th place position in the ranking of industry employment in Kingston.

Wages grew 5.7% in 2025, and the average wage of both full- and part-time workers supported by tourism activity grew 3.6% to \$48,950.



Benefiting Kingston Businesses

Visitors spent \$539 million in travel-related expenses, benefiting a broad array of local businesses.

In 2025, Kingston businesses that directly served visitors saw value-added of \$267.5 million, up 5.9% from 2024.

Kingston's tourism supply chain businesses accumulated value-added of \$41.0 million in 2025, an increase of 5.5%.



Contributing to Public Education & Other Government Services

If spend solely on education, tourism-supported provincial and municipal taxes would be enough to educate 6,200 Kingston public school students, which is 30% of total enrollment in the Limestone District.

At a salary of \$45,000, provincial and municipal tax revenue from tourism would be enough to support the salaries of 2,166 public school teachers.



Capturing and Retaining Dollars Spent by Visitors

For every \$1 spent by visitors in Kingston, the region's economy retained 69 cents.

Forty cents of each dollar went to pay Kingston workers over \$215 million in wages and salaries.

Of each visitor dollar spent, 18 cents went towards paying Kingston provincial and local taxes.



Helping to Relieve the Tax Burden of Kingston Households

Without tourism, Kingston's 73,510 households would each have to pay \$1,325 more in provincial and local taxes to maintain current levels of receipts.



Providing Tax Revenue to Support Provincial & Local Government

Kingston tourism contributed \$24.8 million in tax revenue to local collections in 2025, more than the total spent by the City of Kingston on the fire fighting program in the city budget.

About Rockport Analytics

Rockport Analytics is a research and analytical consulting firm providing high quality quantitative and qualitative research solutions to business, government, and non-profit organization clients across the globe. We provide fast, nimble service in a completely transparent environment.

Capabilities include:

- Market Analysis and Forecasting
- Economic Impact Assessment, Tourism Satellite Accounting, and Economic Development
- Market Modeling and Decision Support Tools
- Project Feasibility Assessment
- Primary and Secondary Research Synthesis
- Stakeholder Surveys – internal & external



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