



— *Tourism* —
KINGSTON

SPORT TOURISM STRATEGIC FRAMEWORK

Giving Kingston the competitive advantage

January 2021

Ontario 

Table of Contents

Introduction.....	2
Sport Tourism Strategic Framework – Tourism Kingston	3
Sport Tourism in Canada	3
Definitions	4
The Sport Tourism Customer Profile	5
Kingston Sport Tourism.....	7
Event Classifications.....	7
Current State Assessment	8
Venue Assessment	8
Accommodations	9
Sport Tourism Impacts	9
Stakeholder Engagement	11
Sport Tourism Strategic Framework.....	12
A Strategic Approach to Sport Tourism	13
Vision – Kingston Sport Tourism.....	14
Mission	14
Sport Tourism Action Plan.....	14
Structural	15
Financial.....	15
Operational.....	16
Marketing	16
List of Appendices	17

Introduction

Sporting events play a significant role in attracting visitors to a destination. Whether it be a professional series event or a peewee tournament, each has their potential in generating economic prosperity for the local tourism economy. The City of Kingston and its available sports and tourism infrastructures have a proven track record for sports events attraction. In the late fall of 2020, Tourism Kingston decided to elaborate a targeted framework aimed at increasing sporting events attraction, alignment of key stakeholders and consideration of future product upgrades and development.

Many event host destinations take the “ready, fire, aim” approach to major event attraction and hosting resulting in mixed results. To ensure a sustainable and repeatable model for major event attraction and hosting for Kingston, FLOOR13 was hired to work to custom build a strategic approach to event bidding and hosting for Tourism Kingston based on the needs of the community and the relevant partner and stakeholder organizations.

Using a discovery process that began with a jurisdictional review of host cities in Canada and worldwide, as well as working closely with staff and engaging all stakeholder groups, the following comprehensive sports tourism roadmap was defined. Success of this framework is rooted in good governance, clear roles and responsibilities and engaging all organizations that have a role, and stake, in the success of the major events in the City going forward. This framework will initiate a more proactive approach to sports and events tourism where results can be assured and impacts effectively measured.



Sport Tourism Strategic Framework – Tourism Kingston

Sport Tourism in Canada

Sport tourism is defined by Sport Tourism Canada as “any activity in which people are attracted to a particular location as a sport event participant, an event spectator, or to attend sport attractions or business meetings.” This can be further enhanced with development clinics (player, coach, or official) as well as training camps, all of which can attract visitors.

Sport tourism in Canada is a \$6.8 billion annual industry and at its core is a grassroots economic development initiative. Beyond the economics, sport tourism and the staging of sport events can also support the social and sustainability impacts that can be delivered in a community.

In Ontario, sport tourism generates significant economic activity and is a catalyst for visitor attraction. In 2018, Ontario realized the highest number of sport-related visits by province, with 6.6 million total visitors. Most of these visitors – 5.8 million – were domestic or Canadian in origin. There were 466,000 visitors to Ontario from the United States and 341,000 from overseas. The Ontario share of visitation among Canadian provinces and territories is 41% of all sport visitors to the country.¹

The spending profile of the sport tourism visitor in Canada is significant, with an average spend per Canadian visitor of \$145.09 for same day and \$546.56 for overnight visitors. The average spend per sport tourism visit in Canada is \$301.56. The average spend for a U.S.-based visitor is \$775.26; overseas visitors spend an average of \$2,033.01. The value of sport tourism in terms of spending in Ontario in 2018 was \$2.7 billion.

Sport tourism can build business, build sport, and build community. It can also positively impact several of the United Nations Sustainable Development Goals (SDGs). For sport tourism to be truly strategic, it must be planned, delivered, and evaluated and work toward planned legacies with a consistent and repeatable approach.

¹ Sport Tourism Canada: Value of Sport Tourism in Canada (Paradigm Consulting using data from Statistics Canada 2018 *National Travel Survey*, *Visitor Travel Survey* and *International Transactions in Services*).

Definitions

Like many industry segments, sport tourism has many acronyms and terms that are specific and may differ from other areas of sport, business or tourism. The following identifies some of the terms that are used in this report:

Term	Definition	Term	Definition
Average Spend	Total direct revenue divided by the total number of customers from a sport event	Local Sport Organizations	The volunteer-led organizations that oversee and deliver programming and competitions for a specific sport
Bid Assessment	The process used to evaluate a potential event prior to the bid process	Multi-Sport Organizations	Local, provincial, or national organizations that award hosting rights for multi-sport events such as Ontario, Canadian, or international Games
Dislocation	The impact of reduced access to facilities or amenities by residents or user groups as a result of hosting an event	National Sport Organizations	National governing bodies for a given sport in Canada
Displacement	The impact to booked business as a result of hosting an event	Provincial Sport Organizations	Provincial Sport/Multi-Sport Organizations (PSO/MSOs) are not-for profit organizations formally recognized by the Ministry of Heritage, Sport, Tourism, and Culture Industries as the governing body of a particular amateur sport in Ontario
Decision Support	The process of gathering information and intelligence in a consistent manner to develop a business case leading to evidence-based decisions on events	Rights Holders	An organization or private company who has an existing event and makes decisions on how and to whom the hosting “rights” are awarded
Event Attraction	The process of promoting and selling Kingston as a host for events within a specific sport or segment to prospective customers	Sport Host Destination	A city or town that has identified sport hosting/sport tourism as a tool to build business, sport, and community
Event Legacy	Long-term positive outcomes from an event including cultural, financial, or physical (such as equipment or infrastructure)	Transfer of Knowledge	A process by which knowledge, ideas, and experience move from one bid or host group to another for the shared benefit of Kingston

The Sport Tourism Customer Profile

Primary

Kingston's primary customer group makes direct decisions on or influences the location of sport and sport business events that define the city's success. That includes, but is not limited to:

- Provincial and National sport and multi-sport organizations who conduct competitions and championships
- Private rights holders who own existing event properties or have the capacity to create new events
- Professional sport including major and minor professional leagues and teams
- Local Organizers, either for-profit or not-for-profit, who plan and deliver one-time or annual events

Secondary

The second group of customers who impact the success of sport events, as a result of making decisions to travel to Kingston and experience the historical, cultural, culinary and other attractions that are offered within the city and through Eastern Ontario, include:

- Event participants
- Spectators
- Athletes
- Friends and family of athletes or participants

Stakeholders

Kingston has a wide and varied set of stakeholders who feel a degree of ownership in Kingston's success in attracting, creating or hosting successful and safe events aimed at elevating Kingston's hosting brand reputation. This group can and should be considered as "internal customers" to ensure a customer-centred approach to sport tourism.

Identified stakeholder groups include:

- City of Kingston (Mayor, Members of Council, CAO, and City Staff within the Recreation and Leisure department)
- Leon's Centre
- Queen's University
- St. Lawrence College

- Royal Military College
- Hoteliers
- Local Sport Organizations
- Local Event Organizers
- Local Sport Venue Operators
- Kingston residents
- National Sport Organizations with existing relationships in Kingston, including Curling Canada and Sail Canada



Kingston Sport Tourism

Kingston, given its strategic location and proximity to key markets in the Greater Toronto Area, the National Capital Region, Montreal, and Upstate New York, can certainly anchor its reputation as a leading destination in sport event attraction and hosting.

The visitor experience, given Kingston’s history, waterfront location, and compact downtown, culinary offerings, and other experiences is a key driver that can leverage sport events to attract incremental visitation and directly increase the economic impact to local businesses.

Kingston is a leading sport tourism city, based on the Canadian Sport Hosting Index (CSHI), an annual ranking of sport host destinations administered by Sport Tourism Canada. The 2020 CSHI placed Kingston at the number one position in the 150,000–500,000-population category and seventh overall in Canada. This ranking is based on the number of national and international events hosted in the past, events scheduled to be hosted in the future, and bids for upcoming events.

Event Classifications

The sport tourism landscape is wide-ranging and offers opportunities for sports events to be developed or attracted throughout the year. The following chart outlines the types of events and scope for each and a recommended number of events for Kingston to host:

EVENT CLASSIFICATION	REGIONAL	PROVINCIAL	NATIONAL	INTERNATIONAL	FREQUENCY
Invitational Tournaments	✓				50+ per year
Training Camps	✓	✓	✓	✓	2 per year
Sport Business Meetings and Annual Meetings	✓	✓	✓		5 per year
Sport Seminars/Clinics	✓	✓	✓		10 per year
Annual Championships	✓	✓			20 per year
Provincial Championships (Single Sport)	✓	✓			10 per year
Major National Championships (Single Sport)			✓		1 per 3 years
National Championship (Single Sport)			✓		2 per year
International Championships (Single Sport)				✓	1 per 5 years
Multi-Sport Events or Games		✓	✓	✓	1 per 10 years



Current State Assessment

Venue Assessment

This project included a high-level assessment of the sport facilities in Kingston to identify sports that Kingston can potentially target for future bids. The facility assets, when combined with the local sport organization capacity to support bids and the technical expertise to provide local leadership, will help to identify target sports and events within each sport category.

Using a simple rating system: high, medium and low priority, and based on the initial assessment of the facilities alone, the following sports are identified for consideration as target sports by Kingston, which include both male and female, youth, open and “masters” (55+) sport:

SPORT	FACILITIES	LEVEL (Up To)
High Priority		
Athletics (Cross Country)	Fort Henry	International
Basketball	Leon’s Centre, St. Lawrence College	International
Curling	Leon’s Centre	International
Football	CaraCo Home Field, Queen’s ARC	National
Ice Hockey	Leon’s Centre and Invista Centre	National
Rugby	Queen’s ARC, CaraCo Home Field	National
Sailing	Portsmouth Olympic Harbour	International
Volleyball	Queen’s ARC, St. Lawrence College	Provincial
Medium Priority		
Athletics (Track and Field)	CaraCo Home Field	National
Figure Skating	Invista Centre	National
Lacrosse (outdoor)	Queen’s ARC, CaraCo Home Field	National
Ringette	Invista Centre	National
Soccer	Queen’s ARC, CaraCo Home Field	National
Soccer (Futsal)	Queen’s ARC	International
Swimming	Queen’s ARC	Provincial
Low Priority		
Badminton	Queen’s ARC	National
Broomball	Invista Centre	National
Field Hockey	CaraCo Home Field, Queen’s ARC	National
Figure Skating	Leon’s Centre	International

Gymnastics (Artistic, Rhythmic, and Trampoline)	Queen's ARC	National
Lacrosse (indoor)	Leon's Centre	International
Swimming (Artistic)	Queen's ARC	National
Table Tennis	Queen's ARC	National
Volleyball	Leon's Centre	International
Water Polo	Queen's ARC	International
Wrestling	Queen's ARC	National

Kingston can also target multi-sport events or Games as part of any long-term approach to event attraction.

Accommodations

Kingston has a wide range of accommodation offerings appealing to the supply needs of the sport tourism segment.

Like many jurisdictions in Canada, especially those with waterfront offerings, Kingston's peak season is defined by the summer months of June through September, with hotel occupancy greater than 70%. The shoulder seasons (period between peak and off seasons), which generate between 55 and 70% of hotel occupancy, are March to May and October to November. These will be key periods of opportunity for both supply and demand sides of sport tourism. The off season for accommodation providers in Kingston is December through February and, while this period represents the highest window of supply availability, it is also the lowest for demand of sport tourism customers and event organizers for attracted events.

Sport Tourism Impacts

There is a high degree of understanding of the opportunities, benefits, and economic impact of sport tourism in Kingston. For Kingston to be a leading sport host destination in Ontario and Canada, a more comprehensive approach to use economic, social/cultural, and sustainability outcomes will ensure that each sport event can deliver on a "triple bottom line" approach.

Triple bottom line has become an accepted practice for sport tourism destinations to both forecast prior to the event and evaluate its impacts to the host community following its conclusion. This method combines the tangible or "hard" impacts most closely linked to economic factor or identified returns on investment with the intangible or softer impacts, such as social development or pride of place. The triple bottom line can also ensure that the host community is working to identify opportunities for event legacy, which are outcomes from a

sport event that leave the community better than it was had it not hosted. If planned and applied consistently, the sport tourism triple bottom line can provide better information for decision support while also developing a high level of rigour and accountability to residents of the community.

The following matrix provides recommended sport tourism event impacts for Kingston to evaluate based on municipal priorities, strategic direction for Tourism Kingston, and stakeholder needs. These are meant to achieve a more comprehensive outcome-based approach to bidding, or creation and hosting of impactful sport events:

Economic Outcomes	<ul style="list-style-type: none"> • Event Indicators <ul style="list-style-type: none"> • Number of Events by Classification • Economic Impact <ul style="list-style-type: none"> • Gross Domestic Product • Employment • Tourism <ul style="list-style-type: none"> • Room Nights • Length of Stay • Average Spend
Social/Cultural Outcomes	<ul style="list-style-type: none"> • Volunteers <ul style="list-style-type: none"> • Number of Volunteers • Public Engagement <ul style="list-style-type: none"> • Free Public Access • Culture <ul style="list-style-type: none"> • Local Performers/Animators • Local Culinary Partners • Inclusion <ul style="list-style-type: none"> • Equal Opportunity Access • Sport Development <ul style="list-style-type: none"> • Sport Showcase • Financial Legacy (reinvestment in local sport development)
Sustainability Outcomes	<ul style="list-style-type: none"> • Local Leadership <ul style="list-style-type: none"> • Knowledge Capacity • Venues <ul style="list-style-type: none"> • Existing Venue Event Days • Logistics <ul style="list-style-type: none"> • Local Food and Beverage Producers

Stakeholder Engagement

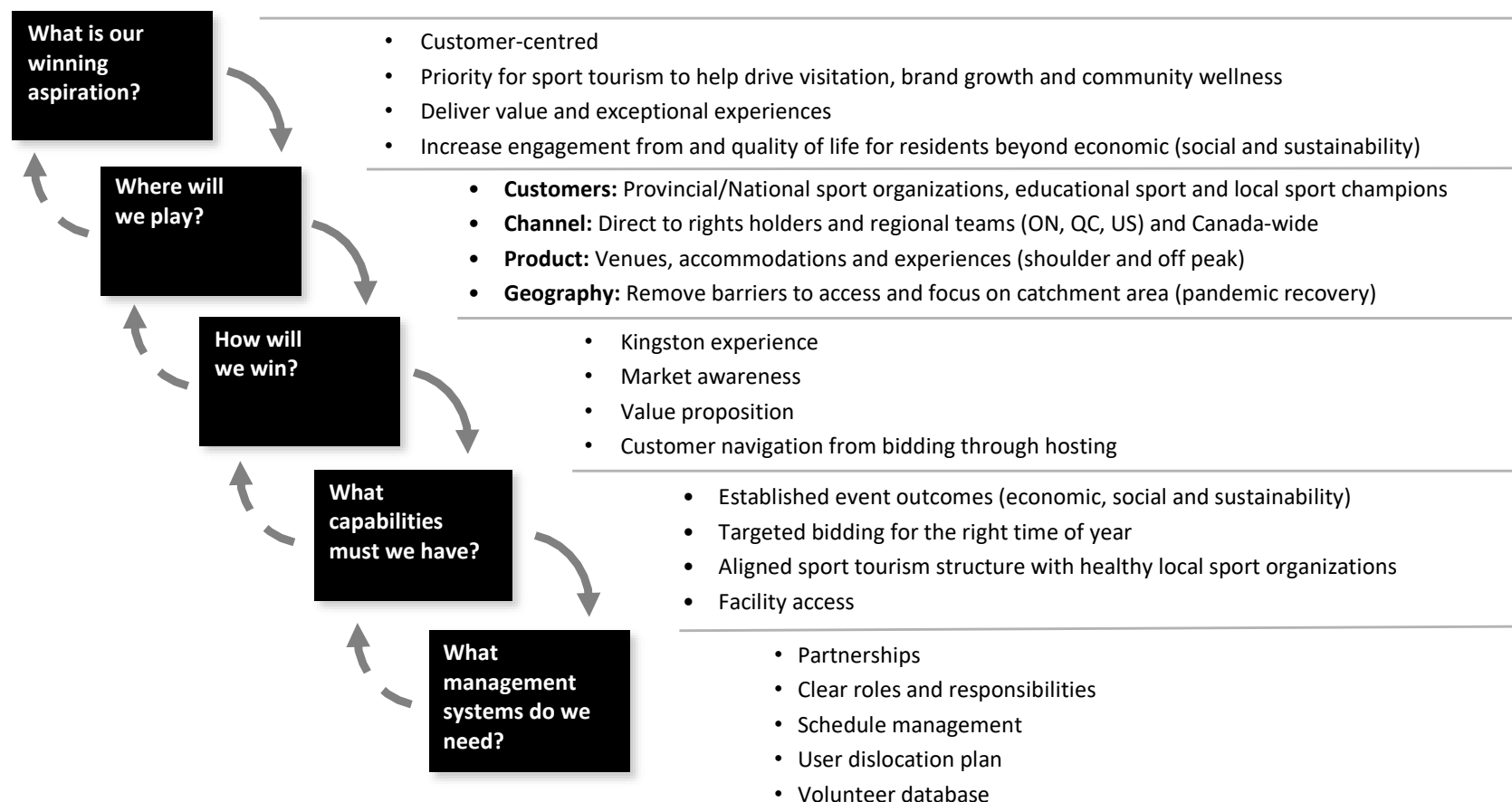
To ensure that this project considered the needs and perspectives of the diverse stakeholder group, which ranges from elected officials to staff, professionals to volunteers, venue and hotel operators and supply chain managers, a range of interactions were undertaken. The impacts of the COVID-19 pandemic required all engagements to take place virtually, with a mix of one-on-one interviews and an online survey.

While the complete Sport Tourism Engagement Report can be found in Appendix 3, the main themes that emerged include:

- There is a high-level of understanding about sport tourism among respondents to the survey with an average rating of 4.5 out of 5.
- While most rated Kingston high as a sport event host city, 25% of those surveyed rated the city as “average or below.” The comments associated with this question identified Kingston’s location, beauty of the city, accommodations, and dining as advantages. On the other side of the ledger, facility quality, access, and pricing are seen as potential barriers to sport tourism growth.
- When asked about the key competitors for Kingston in sport tourism, most saw this set as being from within Ontario which may be limiting. Kingston is competing against mid-sized markets from across Canada in addition to those from within Ontario.
- The competitive advantages for Kingston as a sport event host city were identified as being part of the overall visitor experience. Feeling welcomed, restaurants and dining and hotels and accommodations were rated highest among the advantages for Kingston. The costs to host in Kingston are amongst the lowest and value to the customer was rated highest amongst those surveyed.
- To achieve success in sport hosting, marketing and financial factors were linked directly to that success. Marketing Kingston as a sport tourism destination was rated highest while bid support and funding, sponsorship support, and attendance building are among the keys to future sport tourism success in Kingston. The financial risk associated with bidding and hosting will be especially important to address as part of the recovery from the COVID-19 pandemic, given the loss of revenue for local organizations that are key to sport event hosting.
- The limiting factors identified for sport tourism included high costs and availability of facilities and accommodations during peak seasons; local non-profit organizations having the financial resources and support to bid with confidence; COVID-19 impacts to the resumption of sport hosting; cooperation from all levels of government and willingness to support sport hosting; and the need for a downtown convention centre.
- Facility readiness for sport hosting was rated as “average” and 25% of respondents rated this as “low.” The comments associated with this rating included “need for downtown convention centre,” “outdoor facilities need work,” and “hotel rates for sport events outside of peak season.”

Sport Tourism Strategic Framework

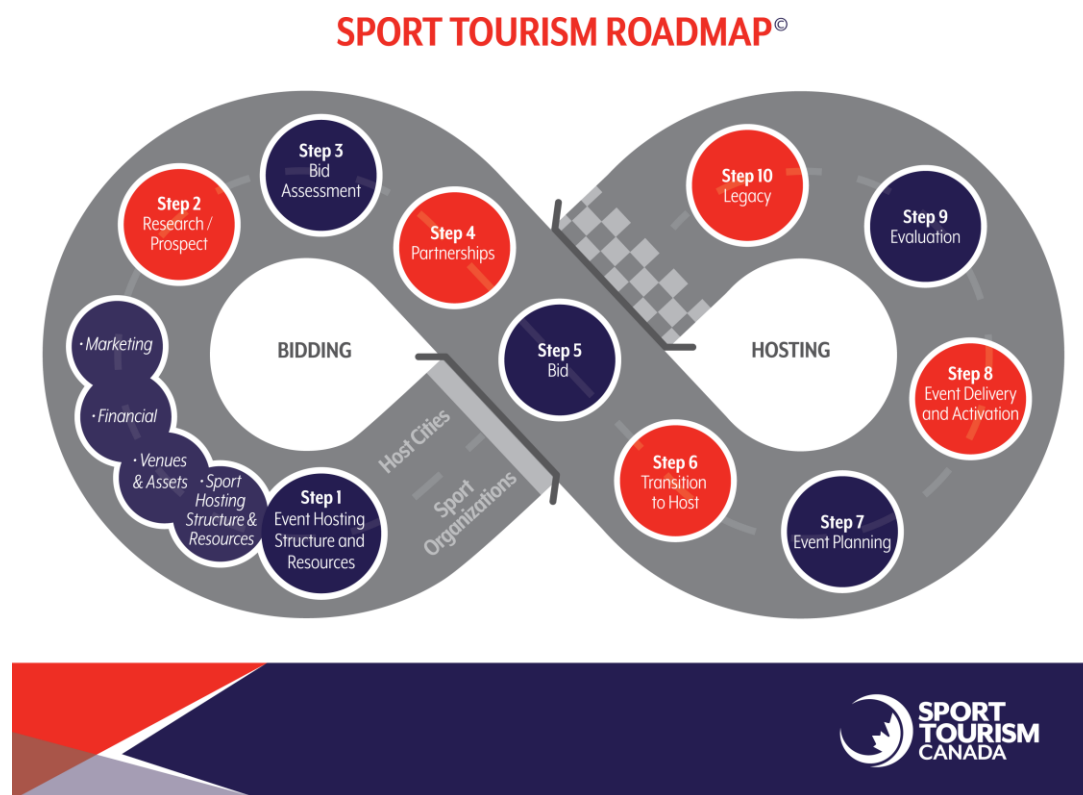
With the information gathered through the discovery phase of this project and using the “Playing to Win” strategy approach, the following is recommended as a strategic framework for sport tourism in Kingston.



A Strategic Approach to Sport Tourism

As part of this project, Tourism Kingston utilized a Sport Tourism Assessment Template Pro, a standardized tool for sport host destinations to receive a standardized and independent snapshot on the current state of the sport tourism structure and delivery.

The STAT Pro Report is based on Sport Tourism Canada's Sport Tourism Roadmap®, an infinity cycle approach to both bidding and hosting, as illustrated below:



With a consistent and repeatable approach to bidding and hosting, sport tourism can be more effective and efficient and can deliver economic, social, and sustainability impacts for Kingston.

Vision – Kingston Sport Tourism

Kingston will be the leading mid-sized sport host city in Canada, growing visitation, reputation, and community wellness while delivering exceptional experiences and value for customers.

Mission

With sport tourism as a priority market segment for future growth, Kingston will provide a clear offer to customers and consistent support to local organizations that delivers sustained growth. The Kingston sport tourism model will have one window that can provide solutions for all in event bidding and creation and hosting excellence.

Sport Tourism Action Plan

Based on the recommendations of Sport Tourism Canada² related to recovery from the COVID-19 pandemic, the following potential actions are offered for consideration. Please note that these potential actions were recommended in November 2020 and may be subject to review based on changes in the response and recovery in Kingston, Ontario and Canada to achieve resilience:

CHALLENGE/OPPORTUNITY	POTENTIAL ACTION
Sport organization capacity to participate in and support bidding and hosting projects	Assessment of local sport organization capacity for future sport event bidding and hosting
Facility readiness to host safe events during recovery phase	Assessment of facilities and coordination of return to hosting plans with safety measures in place
Hosting asset readiness to support sport competition and events	Develop a “living” inventory of capacities for facilities that can be made available to rights holders in real time
Establish defined outcomes for sport tourism during recovery and resilience phases	Engage stakeholders and supply chain partners to determine how sport hosting outcomes in Kingston can support business, sport, venues, and the community
Volunteer capacity to support hosting projects during recovery	Assessment of volunteer interest, and confidence to support sport events during recovery and beyond
Legacies from sport events will be different during the recovery phase	Begin to socialize the legacy opportunities from events during recovery to enable a transition for future planned legacies from sport events

² STAT PRO Report – Kingston: Sport Tourism Canada (2020)

Structural – Kingston will develop an aligned approach that connects organizations within the community to give confidence to customers and ensures a “one-window” solution.

STRUCTURAL	Short-Term (1-2 years)
	Establish sport tourism as a priority sector for Kingston within all associated municipal policies and plans including, but not limited to <i>Kingston’s Strategic Plan 2019-2022, Integrated Destination Strategy for Kingston, Tourism Kingston plans and City of Kingston Parks and Recreation Master Plan.</i>
	Conduct an alignment review to determine opportunities to reduce duplication (multiple local organizations for the same sport).
	Identify roles and responsibilities for all partners and stakeholders.
	Establish a sport tourism lead position within the City of Kingston or as a shared resource with Tourism Kingston.
	Medium-Term (2-4 years)
	Develop a sport event venue hosting requirement analysis as part of recreational facility master plan.
	Conduct a local sport organization capacity inventory.
	Long-Term (5-10 years)
	Develop a volunteer strategy and centralized database for recruitment and management.

Financial – Kingston will provide access to funding sources and will ensure that good process serves as the foundation to support growth and management of financial and reputational risk.

FINANCIAL	Short-Term (1-2 years)
	Examine the potential funding sources to support local organization capacity to bid and host.
	Establish clear access channels for public and/or MAT funding.
	Develop a financial legacy standard to ensure reinvestment in local sport initiatives.
	Medium-Term (2-4 years)
	Establish consistent budget process for all sport events.
	Develop an ambassador program to drive business to all sectors in Kingston that support sport events.
	Long-Term (5-10 years)
Develop a portal for Kingston businesses to share in the success of each sport event.	

Operational – Kingston will shift to an outcome-based approach to event attraction and development that will ensure the future livability of the city and continued engagement of residents.

OPERATIONAL	Short-Term (1-2 years)
	Develop a multi-year event attraction strategy segmented by year and by sport.
	Establish the triple bottom line approach for economic, social/cultural, and sustainability impact areas.
	Develop a sport tourism decision support process.
	Medium-Term (2-4 years)
	Develop action plan and tactics to overcome perceived or real air access challenges.
	Develop sport event attraction plan that is linked to sport hosting impacts.
	Establish Kingston sport hosting legacy guidelines for all events that begins pre-bid.
	Long-Term (5-10 years)
	Develop sport tourism branding guidelines that apply from promotion to bid and through pageantry.
	Develop a consistent transfer of knowledge process that is centralized.

Marketing – As a traditional host and gathering location, Kingston will capture and tell its unique and authentic sport hosting story to build awareness and reputation for hosting excellence.

MARKETING	Short-Term (1-2 years)
	Capture inventory and sport hosting content for delivery through sport hosting channels (i.e., website, social media, pitch documents).
	Tell the Kingston location story using existing transportation links to promote accessibility.
	Develop a Kingston sport tourism marketing strategy.
	Medium-Term (2-4 years)
	Develop a social media and digital strategy.
	Develop an event toolkit that supports local bid groups.
	Implement an accountability process to communicate value of sport hosting to residents annually.
	Long-Term (5-10 years)
	Continue to capture and tell the compelling Kingston sport hosting story.
	Develop an event activation plan to ensure the success of each event.
Align destination marketing with sport hosting projects.	



List of Appendices

- 1) [Kingston Sport Tourism Assessment Template \(STAT\) Pro Report](#)
- 2) [Kingston Sport Venue Overview](#)
- 3) [Kingston Sport Tourism Engagement Report](#)

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Sports Tourism Strategic Framework

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