

2022
Visit Kingsport
Strategic Roadmap





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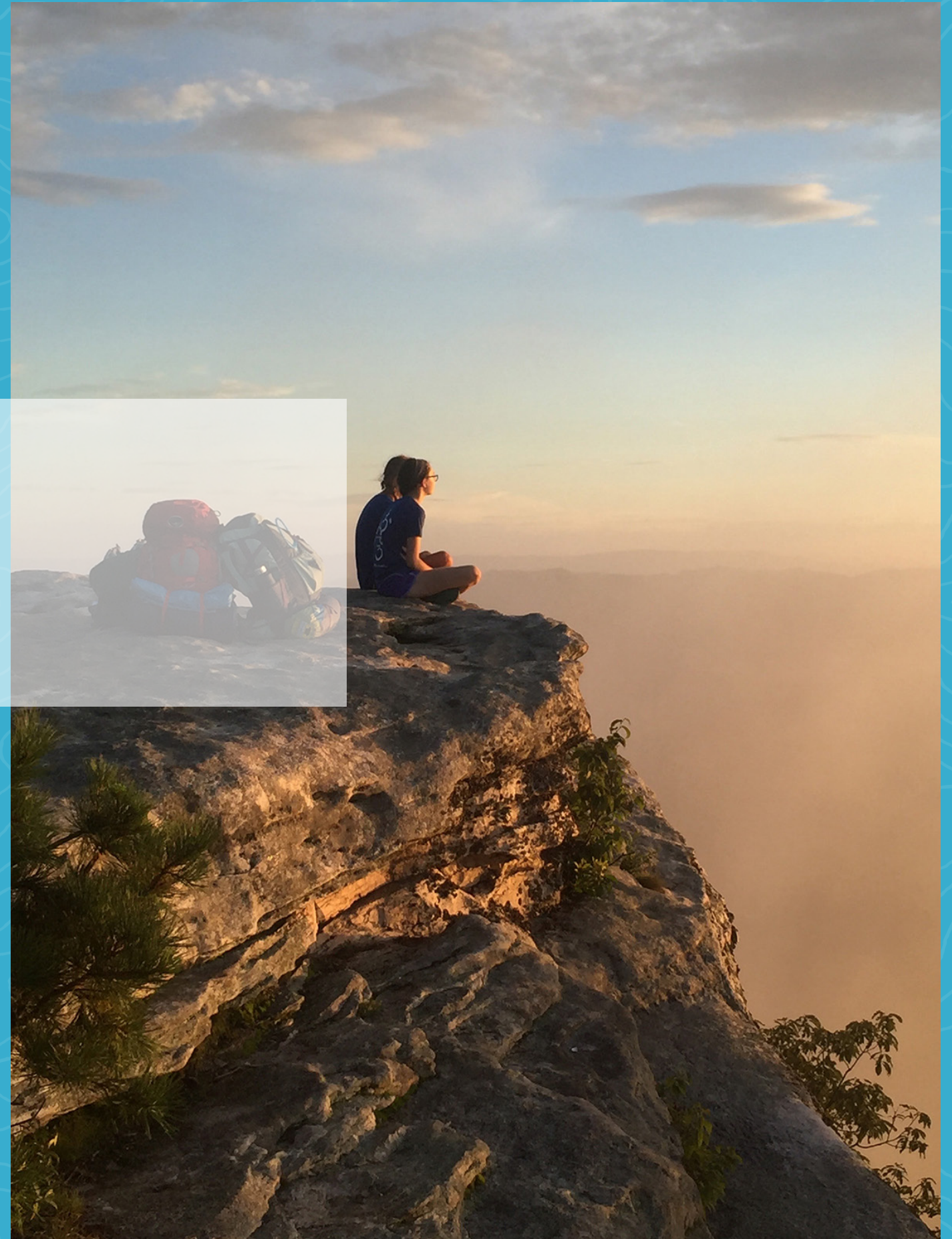
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SECTION 1

INTRODUCTION





EXECUTIVE SUMMARY



Dear Visit Kingsport Staff, Council, Elected Officials, Stakeholders, and Community Leaders,

Thank you for engaging Stoll Strategies to conduct this comprehensive Strategic Roadmap process for Visit Kingsport. It has been our pleasure to work with and get to know the wonderful Kingsport community and many of you, who wear multiple hats in the community and clearly care so deeply about your city.

There is no doubt that the landscape of the travel and tourism industry is rapidly changing. We commend Visit Kingsport's leadership for keenly recognizing the need to review its current operations and adjust to meet the demands of industry changes to ensure continued success of the organization.

The great news is, Visit Kingsport is on exceptionally solid footing. There are tremendous things happening with Visit Kingsport at the helm – a growth of Fun Fest, increased sporting events, recovering lodging tax yield, and increasing migration to Kingsport, among other successes to celebrate.

While these things may cause one to think “if it's not broken, don't fix it,” our philosophy is quite different. Visit Kingsport is fortunate to be in such sound position, but it is also a perfect opportunity for continued refinement and developing an eye for what we like to call Continual Quality Improvement, or CQI. Think of the analogy of your car. It may be in just fine working order, but you still change the oil, rotate the tires, take it for a wash, or even put some additional bells and whistles on it. CQI is a similar mindset. It sets the foundation for the journey of improvement, rather than a destination of success. It fosters an organizational culture that refuses to rest on its laurels and promotes a philosophy opposite of “the way we've always done it” thinking.

Visit Kingsport is to be applauded for the proactive approach through which the organization's leadership is analyzing its business practices through this Strategic Roadmap process. This Roadmap starts with a high-level review of industry trends and insights, dives into the current state of Visit Kingsport, and finishes with a clear path forward for Visit Kingsport's future.

The goal of this Roadmap is to serve as a dynamic guide for Visit Kingsport into the future, garner the buy-in of community stakeholders, and creates a shared vision for maximizing Visit Kingsport's success, not just for the organization, but for the entire Kingsport community. Ultimately, the Strategic Roadmap is a tool for continually cultivating a place where people want to visit, work, and play.

Thank you to all involved for making this 2022 Visit Kingsport Strategic Roadmap possible.

Respectfully,
Jennifer Stoll, PhD
Principal, Stoll Strategies



VISIT KINGSFORT TEAM



Jud Teague
Executive Director



Frank Lett
Sr. Associate Executive Director



Lara Potter
Associate Executive Director



Robin Cleary
*Executive Director of the Downtown
Kingsport Association*



Jeff Fleming
Relocation Manager



Malik Foreman
Sports Marketing Manager



Bradley Hoover
Sports Marketing Manager



Chelsea Ketrn
Marketing Manager



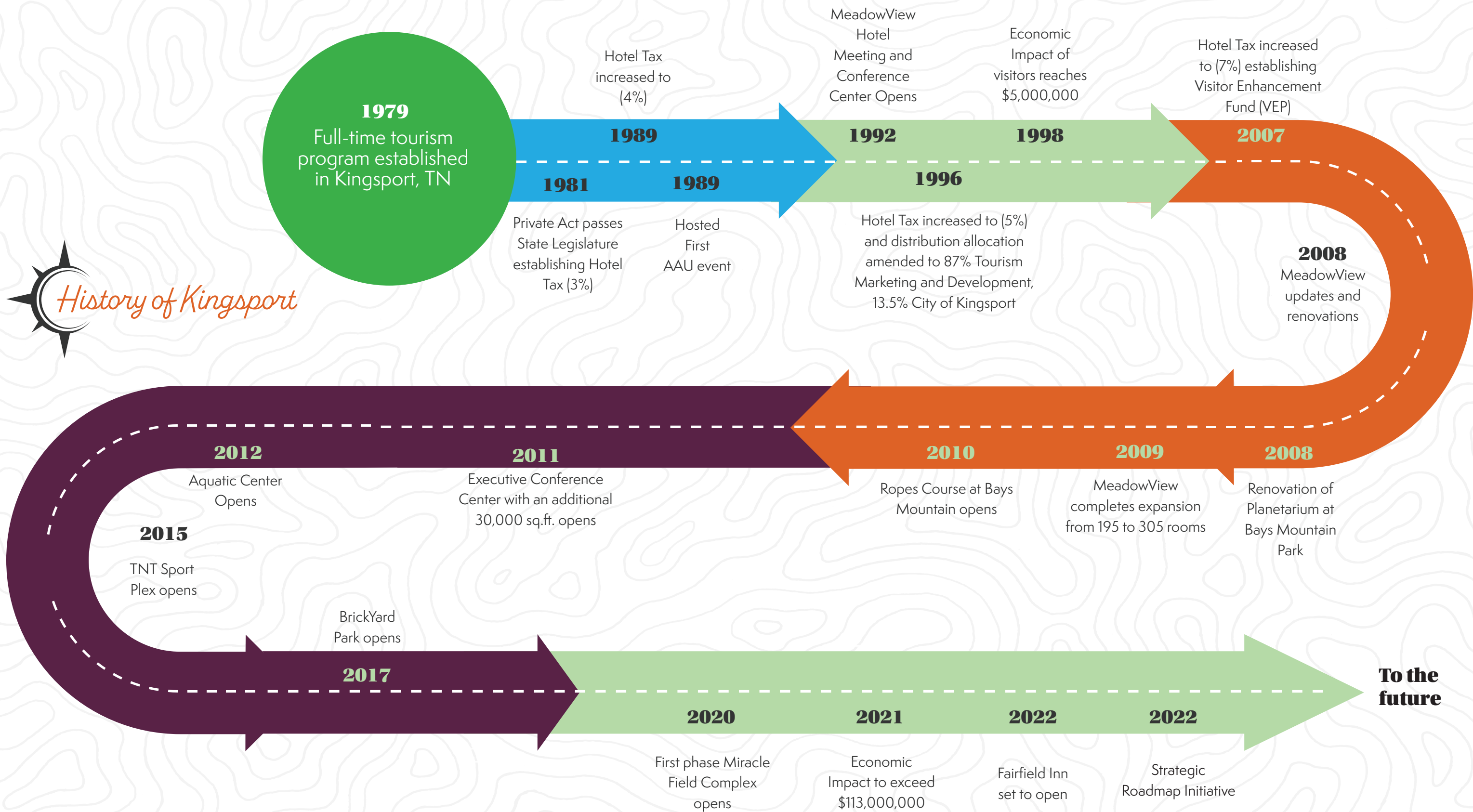
Emily Thompson
Director of Fun Fest and Special Events

VISIT KINGSFORT COUNCIL

- + Andy Wampler (Chair)
- + Rob Arnold
- + Lorrie Cooper
- + Bob Feathers
- + Colette George
- + Gail Hulse
- + Ramona Jackson
- + Steve LaHair
- + Chris McCartt
- + Claudia Moody
- + Chris Patel
- + Alicia Phelps
- + Lisa Williams
- + Melissa Woods



VISIT KINGSFORT HISTORY





Visit Kingsport Highlights and Accolades

Visit Kingsport's Frank Lett was awarded Sports ETA's Trailblazer of the Year in 2021.

Visit Kingsport's Jud Teague was named Tennessee's Top Tourism Professional of the Year by the Tennessee Hospitality and Tourism Association (TNHTA) in 2019.

Kingsport's Miracle Field was awarded the Tennessee Public Worlds Project of the year in 2020 by the Tennessee Chapter of the American Public Works Association (TCAPWA).

The Fun Fest Crazy 8's Road Race, which holds both men's and women's 8-K world records, was listed by Blue Ridge Outdoors Magazine as one of the Top Five Best Road Races in the South.

FUN FEST

Home to Fun Fest, a nine-day summer family festival that is consistently ranked as one of the Top 20 Events to attend in the Southeast in July by the Southeast Tourism Society. More than 180,000 people attend.

VENUES

Visit Kingsport utilizes 10+ unique locations when hosting sporting events.

Northeast Tennessee Tourism Association 2021 Pinnacle Award Winners

- 🏆 Best Sports Event – USSSA World Series (Visit Kingsport)
- 🏆 Best Marketing Campaign – Space for Everyone (Visit Kingsport)
- 🏆 Best TV Commercial – Space for Everyone (Visit Kingsport)
- 🏆 Best Social Media Campaign – National Long Island Iced Tea Day (Visit Kingsport)
- 🏆 Hospitality Leader of the Year – Ramona Jackson (nominated by Visit Kingsport)
- 🏆 Tourism Leader of the Year – Jud Teague

Northeast Tennessee Tourism Association 2020 Pinnacle Award Winners

- 🏆 Best Sports Event – Tennessee Big Shots (Visit Kingsport)
- 🏆 Best Marketing Campaign – Long Island Iced Tea (Visit Kingsport)
- 🏆 Best Public Relations Campaign – Round Three of the LIIT Battle (Visit Kingsport)
- 🏆 Best Advertising and Promotions: Brochure or Guide (Visit Kingsport Visitor Guide)



STRATEGIC ROADMAP PURPOSE AND OBJECTIVES



Outlines Visit Kingsport's *fundamentals*,
where the organization is headed,
and *how* it gets there.



✓
Provides tourism
industry context

✓
Defines Visit Kingsport's
core business profile

✓
Establishes Visit Kingsport's
strategic priorities
and recommendations

✓
Details Visit Kingsport's
competitive positioning

✓
Analyzes Visit Kingsport's
long-term sustainability

✓
Identifies metrics by which
Visit Kingsport
measures success

STRATEGIC ROADMAP METHOD





SECTION 2

INDUSTRY OVERVIEW





DMO stands for Destination Marketing Organization.

Purpose of a DMO – To promote visitorship to a specific destination or geographic region.

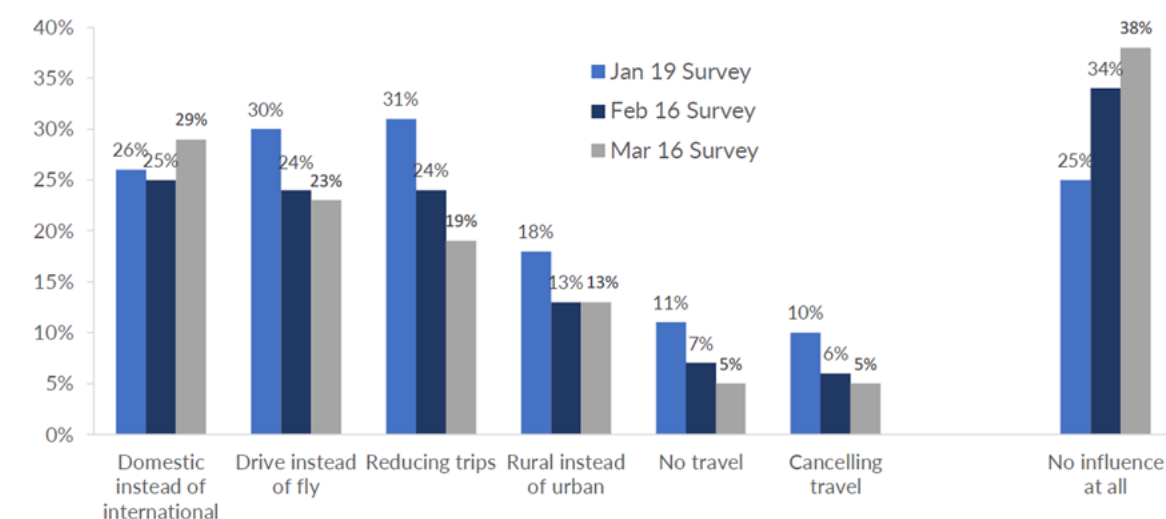
Top 5 Organizational Functions for U.S. DMOs according to Destination Analysts per the 2020 Funding Future report:



- + Many years of **significant growth** pre-pandemic
- + Tourism and hospitality one of **hardest hit industries** in the pandemic
 - TN was 1 of only 7 states to see an increase in consumer spending in 2020 (Opportunity Insights Tracker)
- + Accentuated the need to shift to **firmly establish community** value proposition
- + **Covid's changing impact** on travel sentiment (According to Longwoods International week of March 16, 2022):

Covid is a factor, but situation is rapidly improving

Influence of COVID-19 on Travel Plans in Next Six Months
% of travelers



Source: Longwoods International

Shift to DMMO

In recent years, DMOs have shifted to DMMOs – or Destination Marketing and Management Organizations –to more accurately reflect the growing focus on management of visitor flow and experience in destination. This is not only a trend expected to continue, but a key mindset in management and operations of tourism entities around the country.

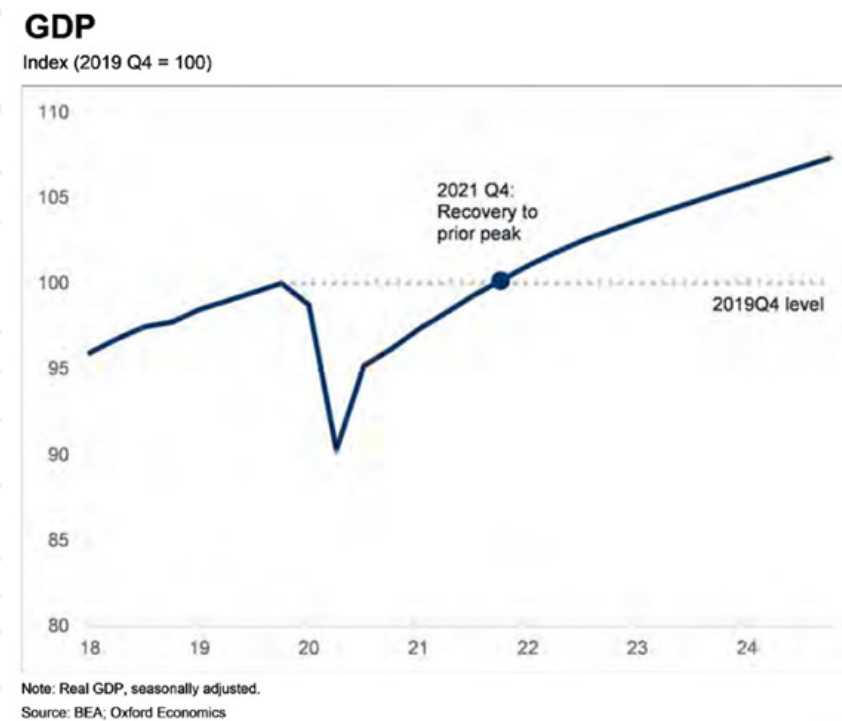
Visit Kingsport as a DMMO:

Visit Kingsport has embraced the new role of a DMMO as demonstrated in their work with community events, Downtown Kingsport Association, Bays Mountain projects, Miracle Field, Move to Kingsport, and other initiatives that serve to market and manage the destination.



Covid Recovery

Gross Domestic Product Impact:



!

Watching Indicators

Several other indicators are heavily impacting present and near-future tourism projections, including:

- o Inflation
- o Geopolitical conflict
- o Gas prices
- o Wage growth
- o Labor shortage

Tourism Economics is predicting that despite inflation and labor force constraints, headwinds will improve in 2022:

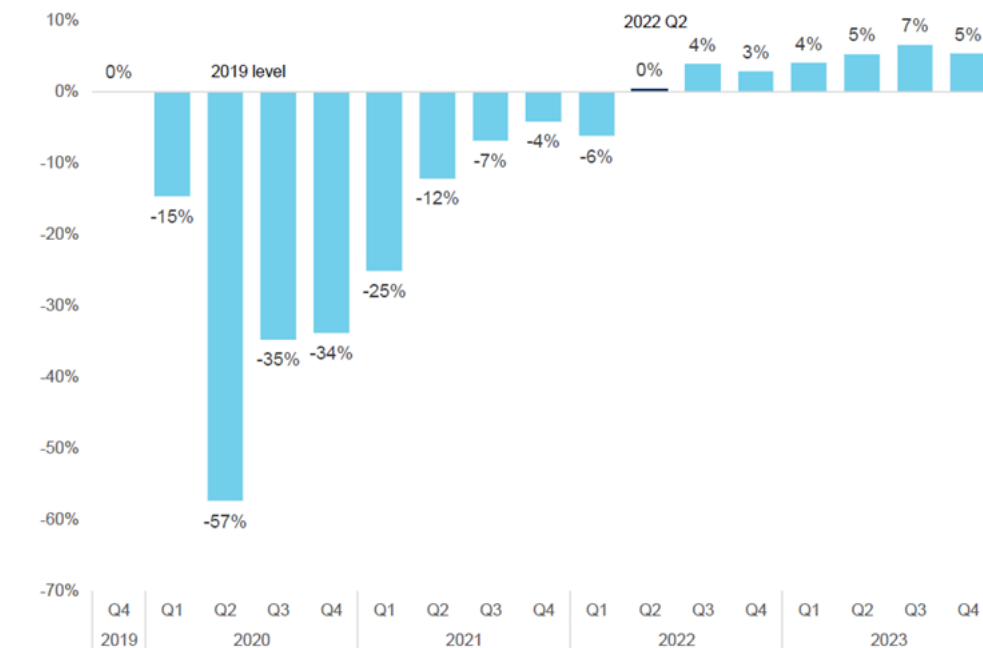
- o Business travel has continued to lag, with positive movement forecasted.

Tourism Economics reports nearly 60% of businesses still not traveling but anticipates pick-up.

Room demand breaks through 2019 peak in 2022 Q2

Room demand

Quarterly, relative to 2019

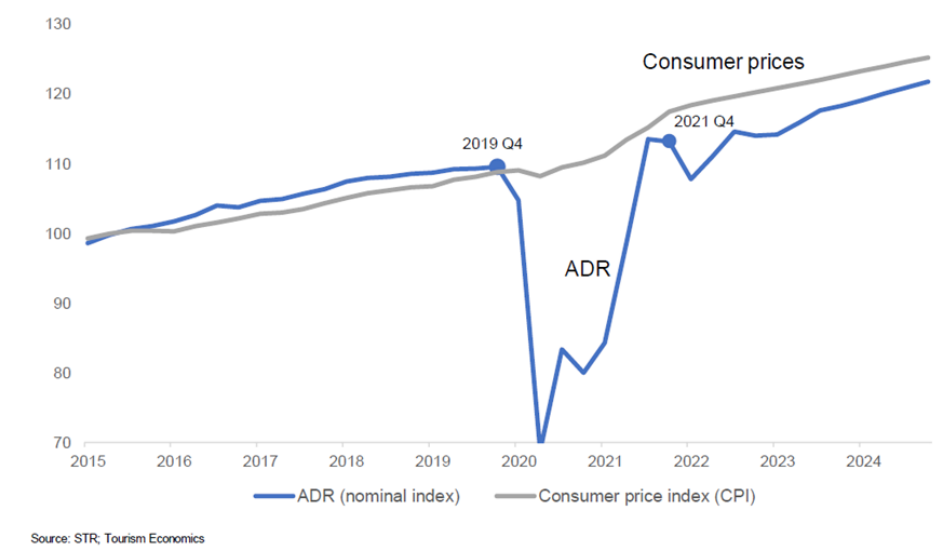


Tourism Economics and STR are both anticipating room demand eclipses 2019 levels this quarter (Q2, 2022) and ADR to recover to 2019 levels this summer (Q3, 2022), but below inflation.

...as ADR lags inflation

US ADR

ADR and CPI index (2015=100)





Three Main Take-Aways from recent Tourism Economics reporting:

1

Domestic leisure travel is leading the travel re-emergence.



2

Business travel will take at least a couple of years to fully recover.



3

ADR will gain, but not keeping pace of inflation.



Tourism
is often an
antiquated
way to describe the
current dynamics
of the industry



Consumer behavior is shifting

- + Purchasing power, behavior, and perception of Gen Zs
- + Requiring travel that is highly experiential in nature
- + Changing distribution of tourism – increase leisure, visitor intelligence, destination management, etc.

Sports Tourism

- + Facility/Venue arms race
- + Public profile requires broad outcomes
- + Distribution of sport shifting – popular sports, participation, and governance
- + Sport Spending (2019 Sports ETA State of the Industry Report) - \$45.1B in direct spending in 2019 (\$103.3B Economic Impact)
- + Updated State of the Industry Report reflecting 2020 and 2021 numbers shows \$39.7B in direct spending and \$91.8B in total sports travel related economic impact

Increase in technological and innovation-based advancements

- + Destinations are getting smarter about how they conduct business
- + Research, data, and analytics are removing the guesswork

Increased emphasis on sustainability

- + Organizational sustainability
 - o Human and financial sustainability
- + Social Sustainability
 - o Managing the entire life cycle of visitor experience from searching out destination, the actual visit, and post-visit behaviors
 - o Today's travelers demand travel be highly experiential
- + Environmental sustainability/ regenerative tourism
 - o Sustainable Tourism: Respecting unique resources and assets in a destination to ensure their preservation for future generations.
 - o Regenerative Tourism: Leveraging tourism to leave community resources better than pre-travel.



Tennessee Tourism Outlook

Following a decade of record-breaking growth, Tennessee tourism was on track for a milestone 2020 until COVID-19 halted nearly all travel. The single largest crisis to hit the industry, the pandemic represented **\$303 million in lost** state revenue between March and December 2020. (TDTD 2021 Annual Report)

Prior to the Covid-19 pandemic, visitor spending in Tennessee had risen steadily to an all-time high of \$24.5B in 2019. The visitor spending number dropped by 31.6% to \$16.7B in 2020 (Tourism Economics). A breakdown of the 2020 visitor spending numbers by categories is as follows:



+Tennessee's population grew by 564,735 people over the 2010-2020 decade, an increase of 8.9%, for a total population of 6,910,840. (TimesNews)

+The state of Tennessee saw \$16.8B in visitor spending in 2020, resulting in \$1.4B in state and local tax revenue. While these figures were significantly lower than 2019, the state of Tennessee outperformed the national decline in each area. (Tourism Economics)

+ A look at the 2020 Domestic Visitor Profile from the TDTD Annual Report revealed:

Average length of stay was 2.44 days (highest ever)

Overall leisure visitor satisfaction score of 8.85 out of 10 (highest ever)

Hotel/Motel rooms accounted for 58% of all accommodations

Key Takeaways

Old way is gone - Community value proposition is paramount

Industry is getting smarter across all segments of tourism

Tennessee Department of Tourist Development understands the value of, and is a strong ally in, fostering the State's tourism recovery and growth

Experiences are mandatory for new consumer behavior patterns

Tennessee is an ideal state to leverage tourism for economic development



SECTION 3

INDUSTRY OBJECTIVES



State Objectives



Tennessee Department of Tourist Development (TDTD) Strategic Plan 2020-2024 Key Objectives

- + Establish a sustainable funding model
- + Become #1 non-beach destination in the nation
- + Increase presence in increased domestic markets
- + Develop new domestic markets
- + Extend reach of existing rural programs and initiatives
- + Increase capacity and resources to the "Rural 44"
- + Compare performance data against other states



Regional Objectives

“

Rural communities have seen an increase in visitation as travelers seek safe experiences in less-populated areas. We have a real opportunity to make a big impact through tourism. Additional investments in these communities will generate revenue and a sustainable return on investment. (TDTD 2021 Annual Report)

”



In 2020, Sullivan County ranked 11th of 95 TN counties in visitor spending (10th in 2019) 2020 County Snapshots. (Tennessee Department of Tourist Development)

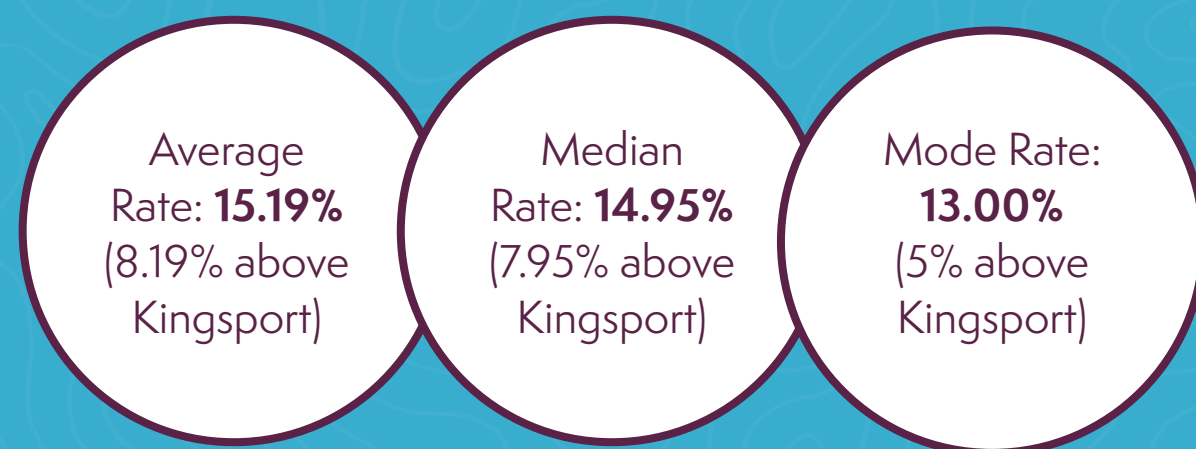
15%

According to the 2020 Census, 25 of 31 counties in the Appalachian Highlands shrank. Sullivan County grew by 0.9% and the population of Kingsport increased 15.0%.

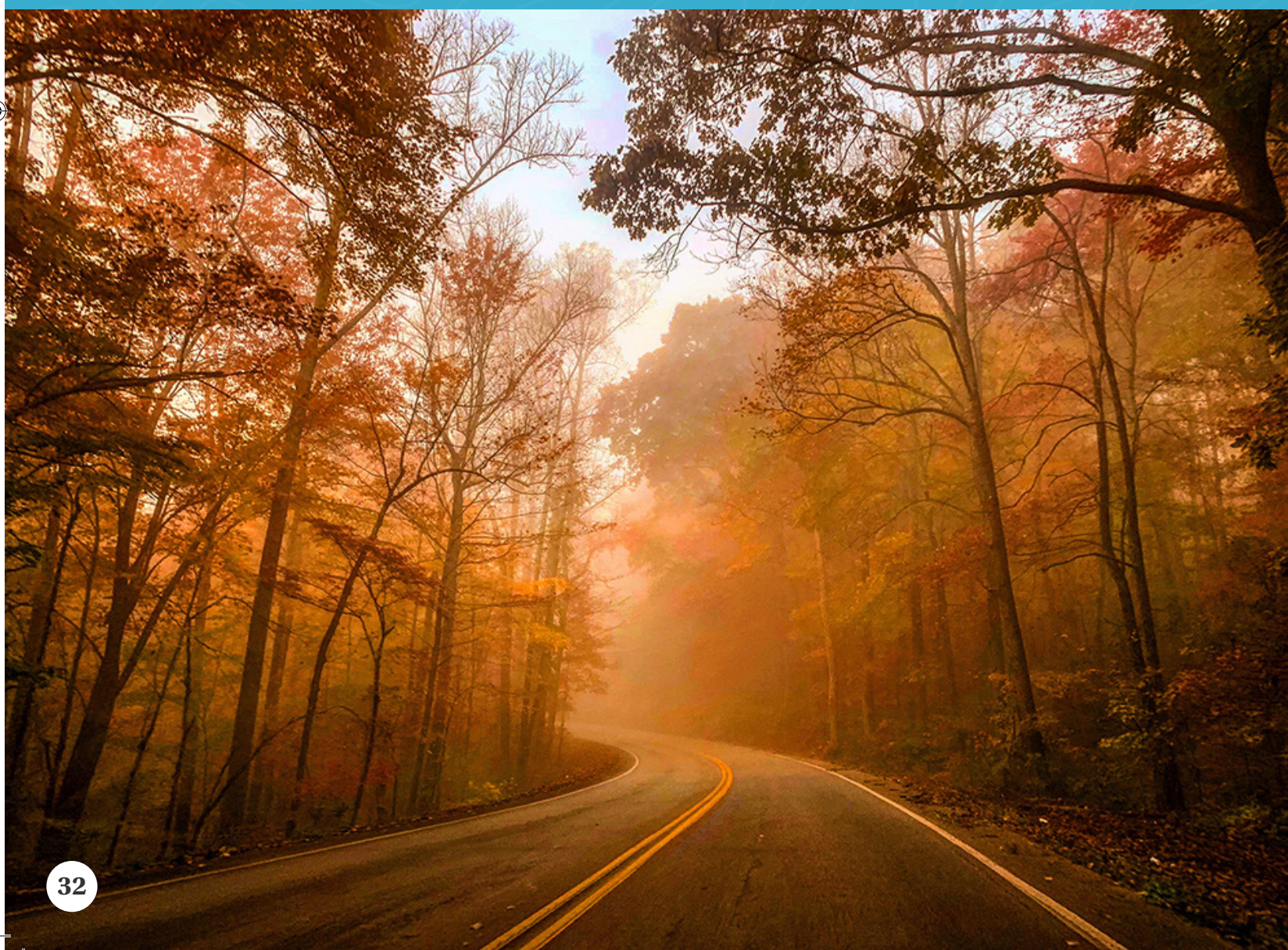
The Economic Impact of Travel on Tennessee report indicated that the direct economic impact on Sullivan County in 2020 was as follows:

Employment	Labor Income	State Taxes	Local Taxes	Direct Spending
2,313	\$66.7M	\$11.0M	\$8.1M	\$227.5M

Southeast (AL, AR, NC, FL, GA, KY, LA, MD, MS, TN, VA, WV, DC) Lodging tax rates in 2020 per Civitas Funding Futures Report:



Average Lodging Tax increased 0.3% from 14.62% in 2018 to 14.92% in 2020 (Funding Futures 2020 Report)



National Objectives

National Travel and Tourism Strategy Update (2019) - International Trade Administration (U.S. Department of Commerce) - Selected strategies relevant to Visit Kingsport:

Partner with State, Local, Tribal, and Territorial Governments.

Join non-federal tourism authorities in place-based and activity-based promotional campaigns. Provide grants and technical assistance to qualified public sector entities to support their efforts to attract and serve additional visitors.

Increase exposure by travelers and potential tourists to travel and tourism promotion materials for federally managed destinations. Cross promote American cities, parks, museums, and other points of interest. Develop and promote itineraries designed to appeal to visitors with interest in certain subjects, activities, historic events, or anchored by well-known and popular destinations.

Provide Information About Destinations We Manage.

Connect Visitors to Iconic and Off-the-Beaten-Path Destinations.

Enable travelers to see America's special places that are off the beaten path through programs that increase access and awareness, such as America's Byways®, the Federal Lands Highway Program, the Transit in Parks Program, and the Recreation Trails Program, and increase the availability of multimodal mass-transit options to these destinations.

Increase and expand the supply of recreation opportunities on public lands, including in approved areas for hunting and fishing, use of recreational vehicles (e.g., e-bikes, all-terrain vehicles, etc.) on appropriate trails on public lands, expansion of ranger-led recreation programs, and improved collaboration with private-sector guides and outfitters.

Provide Access to Recreation.



Promote Existing Small Businesses.

Partner with travel and tourism associations to increase awareness of the small businesses in their communities and encourage tour operators to include stops at local, small businesses.

Effectively engage with travel and tourism allies to foster communication among federal agencies and leaders of state travel offices, destination management organizations, and trade associations.

Conduct Outreach with Public and Private Partners.

Conduct Research.

Work with the travel and tourism industry to collect and analyze data to support decision-making in the public and private sectors and allow the federal government to better measure the effectiveness of its efforts to increase travel and tourism.



Broad state, regional, and national objectives support efforts of tourism entities like Visit Kingsport

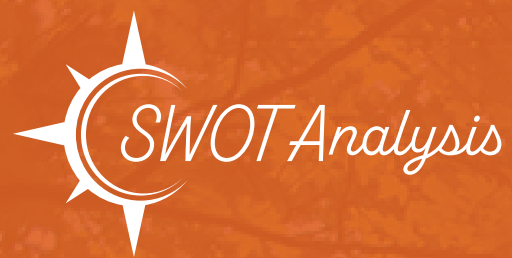
These objectives are interwoven into the Strategic Roadmap to better align Visit Kingsport with future objectives, collaboration opportunities, and potential funding sources.



SECTION 4

ORGANIZATIONAL ANALYSIS





STRENGTHS

- + Diverse selection of facilities and amenities
- + Deliver high quality performance/results on a consistent basis (in multiple areas – Tourism and Non-Tourism)
- + Do more with less – industry leader without “big city” resources
- + Seasoned industry professionals with high-level reputation and respect internal and external to the community (industry, state, etc.)
- + Significant staff event servicing and management experience
- + Added exposure to Visit Kingsport brand from Frank’s involvement in professional trade association (Sports ETA)
- + Fantastic team – all very hard workers, describe one-another as “family”
- + Foresight to go through strategic planning process demonstrates desire to learn and grow



WEAKNESSES

- + Limited hotel inventory (currently 7 hotels, 788 rooms available). This number includes the recently opened Fairfield Inn (39 rooms)
- + Hotels are older (average hotel is 22 years old)
- + Community awareness – noted in 2015 strategic plan, still an issue
- + Resources (human, financial, time) often over-extended (i.e., Handed events that are underperforming with the expectation that they will turn them around causing a hemorrhage of resources)
- + Limited technologies and systematized process efficiencies
- + Inadequate marketing capacity and resources
- + Effective evaluation method and measurement of new/existing program initiatives



OPPORTUNITIES

- + Kingsport is within a day’s drive of 70% of the U.S. Population
- + Warriors’ Path State Park (in Kingsport) is the most visited state park in Tennessee
 - o The swimming pool at WPSP was closed in 2020-21 due to covid and is one of 5 state park swimming pools that will not be reopened due to age, declining participation prior to Covid-19 and high expenses. Tennessee State Parks allocated \$400,000 to each park to invest in new outdoor recreation activities. Public input meeting for the WPSP pool took place on Dec. 15, 2021.
 - o The WPSP is also currently undergoing approximately \$5,000,000 in upgrades and renovations that include a new RV campsite, marina, and docks. (Times News)
- + Exploration of additional venue inventory subsidized by non-local use to drive organizational revenue and provide increased quality of life for the local populous
- + Growth in leisure and outdoor recreation/sport travel in pandemic/post-pandemic era
- + Expansion of industry funding mechanisms

THREATS

- + Other regional competition markets (Rocky Top, Morristown, Princeton (WV), Bristol Casino, possible entertainment district in Bristol, etc.), Murfreesboro (sports complex and convention space)
- + Significant amount of tourism-related business success tied to Meadowview, with competitive conference space coming (Bristol’s casino)
- + Kingsport Parks & Recreation Survey Results revealed that residents do not prioritize facilities that would increase Visit Kingsport’s ability to increase general and sports tourism offerings
 - o Ex. Indoor Basketball/Volleyball Courts (#14), Baseball/Softball Fields (#16), Meeting Rooms/Rental Spaces (#20), Synthetic Surface Sports Fields (#23)
- + Fast-changing technological advancements in industry
- + Community expectation for displacing resources (time and money) to non-revenue generating efforts
- + Long-term sustainability of existing business model



From Kingsport Parks & Recreation Master Plan:

“There may be an opportunity to provide a large indoor athletic flex space in Kingsport that captures space for organized athletic practice and play beyond the facilities currently in place, Such as: basketball, volleyball, and pickleball. This would connect to the existing athletic network that promotes outdoor tournaments and events in the area. It would also strengthen the City of Kingsport as a destination city for regional athletic events, and increase opportunities for growth in the hotel, restaurant, and tourism industries.”

“A very strong network has developed in Kingsport that promotes and hosts large athletic tournament events like the Appalachian Athletics Conference. This provides positive economic activity related to out-of-town visitors. Interest in expanding active athletic venues did not receive the highest levels of prioritization from public input surveys but it did receive strong recognition from focus groups. This could reflect a strong use of these facilities by out-of-town visitors and leagues who did not participate in the public input surveys. Ballfields at Brickyard and Domtar Park, Hunter Wright Stadium and soccer fields at Eastman Park are examples of high-quality athletic facilities that have drawn regional events. There is an opportunity to expand these events to include more indoor events like basketball and volleyball with the addition of indoor athletic flex space. There is also an opportunity to create unique tournament events that are inclusive of larger demographic groups like “50 plus tournament games” and “neurologically or physically disadvantaged – special needs tournaments”.



Venue Assets



- + Strong venue asset position given the size of the community, especially with Meadowview
- + Reason to believe regional competition will continue to put pressure on Kingsport
- + Should this marquee facility not receive necessary maintenance and upgrades, it could significantly impact overall tourism business in Kingsport
- + Mixed public sentiment for supporting additional venue development (sport or otherwise)
- + Centralized location (like Meadowview) would be ideal for sports – “All in one” location
- + Community Capacity Gap Analysis shows that overall community capacity does exist most times of year

- + Any additional venue development/enhancement project would help traditional travel segments, including meetings, sports, and leisure

Lodging Accommodations Insights

+ Meadowview-heavy

- o Meadowview is an outstanding facility for the size of Kingsport and allows opportunities to “punch above your weight”
- o Continued maintenance and upkeep of the facility is paramount to keep competition at bay and exceed industry standards

- + Additional properties (including the new Fairfield Inn) are ancillary for key groups, but important for leisure.

- + Short-term, addition of Fairfield Inn may result in ADR and occupancy dip, but if demand continues to improve post-pandemic, those indicators should bounce back

- + Community may require additional properties as capacity shrinks and Visit Kingsport’s operations are refined

- + Do not lose sight of the increasing importance of short-term rentals logically for leisure, but as a growing desire for sports as well



Community Stakeholder Feedback

Areas of Excellence



1. High-level of respect for Visit Kingsport and the organization’s work
2. Confidence in Visit Kingsport deliverables and willingness to do whatever is needed to help the community
3. Haven for programs and initiatives that have struggled in the community



Areas for Improvement

1. Community confusion on what Visit Kingsport does
2. Clarity of role in the community/ “What does Visit Kingsport want to be?”
3. Sustainability of funds carved from primary tourism objectives



SECTION 5

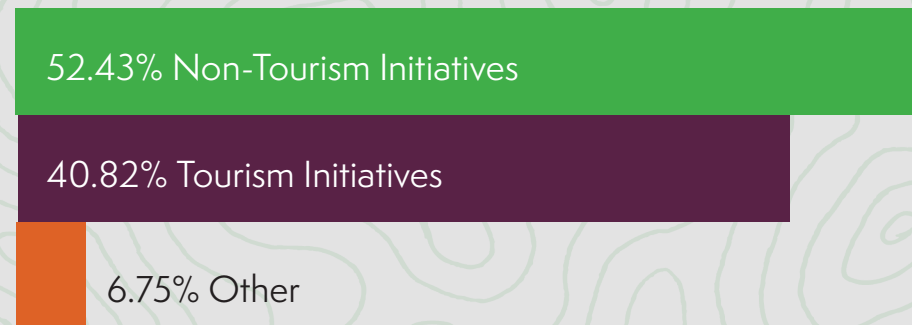
CAPITAL ASSESSMENTS





Financial Capital

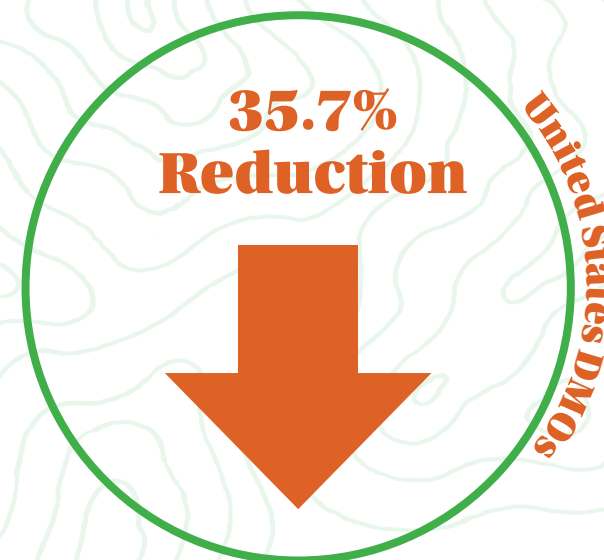
Financial (based on staff reported spreadsheets)



Many DMOs either do not have reserve funds or area precluded from establishing them per lodging tax stipulations which proved catastrophic during Covid in some cases. (per Funding Futures 2020 Report)

FOR COMPARISON:

Average budget impact from Covid = (35.7%) reduction (per Destination Analysts in Civitas Advisors Funding Futures 2020 report)



Top 3 Current Funding Sources per Destination Analysts (Funding Futures 2020 Report)

United States DMOs

1
Hotel
(Lodging Tax)

82.8%

2
Partnerships/
Sponsorships

55.2%

3
Membership
Fees

30.0%



Budget Statement

Visit Kingsport has a strong history of financial prudence in its operations including clear audits with no management findings, sound budgetary planning and oversight, and foundation for future growth. The fiduciary responsibility of Visit Kingsport is also exemplified in its management of Move to Kingsport and the Downtown Kingsport Association.

“Reimagining your DMO’s future role and responsibility is the foundation for reimagining your funding”

-Funding Futures 2020 Report



Key Takeaway

Visit Kingsport has an advantage here in that they are in strong financial position; however, the organization must not rest on its laurels, particularly as the burden of additional program management and subsidy increases.



Staff overview

+ **Jud Teague** – Overall executive

+ **Frank Lett and Lara Potter** – Department Leads, Operations and Marketing/Sales, respectively

+ **Frank, Lara, Bradley, Chelsea, Malik** – Core focused on Tourism

36%

Average time spent on non-tourism activities among the core tourism staff

63%

Average time spent on tourism activities among the core tourism staff

More than 1/3 of the core tourism staff's time is spent on non-tourism related activities.

Program Specific Staff

Jeff Fleming
Relocation Manager

100%

Move to Kingsport

Robin Cleary
Executive Director

98%

Downtown Kingsport Association

Emily Thompson
Director of Fun Fest and Special Events

96%

Fun Fest and other events

Marketing/Communications

Chelsea Ketron
Marketing Manager

Chelsea handles marketing and communications for all Visit Kingsport programs and activities, tourism, and non-tourism.

Overall Average Staff Time Allocation

58.67%

Non-Tourism Initiatives

38.00%

Tourism Initiatives

3.33%

Other



Staff time ratios for tourism and non-tourism initiatives are detracting from core DMMO business functions.

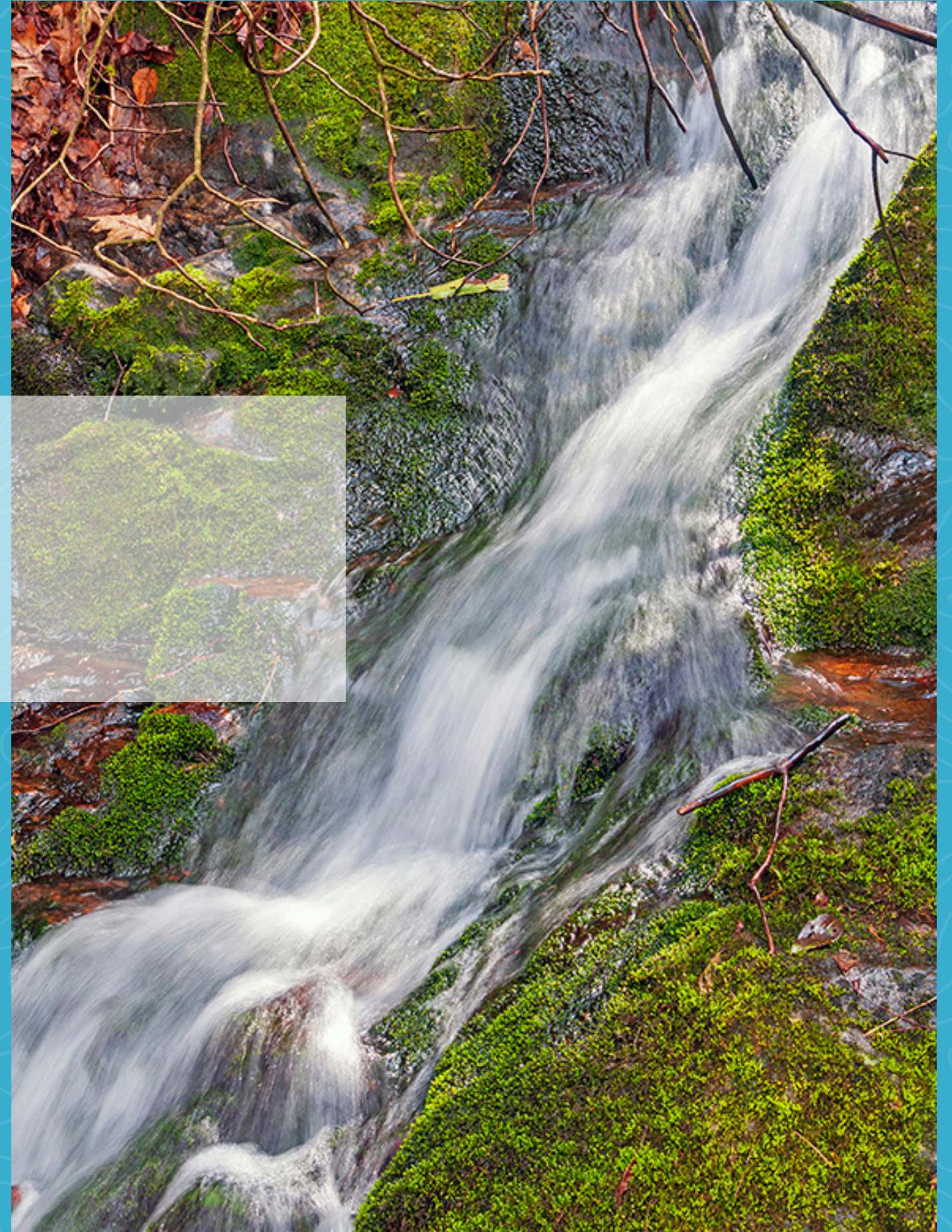
Marketing is a distributed function of revenue for all business units, is short on resources to support overall marketing needs.

Long-term planning for key staff is necessary.



SECTION 6

COMPETITIVE ANALYSIS



COMPETITIVE ANALYSIS



Kingsport is the second largest city of the three, but it has seen the largest population growth (15%) since 2010. It outpaced statewide growth during this time (8.9%).

Bristol (majority of information directly from Bristol TN/VA 2040 Assessment documents)

Bristol area is losing population (negative natural change and unsustainable age dynamics).	Declining workforce – attributed to “brain drain”.	Lower wages than comparison area.	23.8% of all jobs in the Bristol area are related to entertainment/ tourism.
In 2017, 30% of revenue generated from entertainment and tourism was exports (residents from outside Bristol area).	Some residents are unsure of the regional economic development organizations’ ability to market the Bristol area and expand businesses.	Bristol stakeholders see value in creating/marketing a cohesive “Tri-Cities’ brand (but do not know how even the exposure would be).	Entertainment & Tourism was one of four target sectors identified for the community to pursue over the next 5 years (2020-2025).
Major assets – Bristol Motor Speedway, Birth of Country Music Museum, and natural assets.	Major festival (Bristol Rhythm and Roots Reunion) is a big economic driver.		

There are two projects that will impact VK significantly:

1. Casino Resort Project

Before its permanent casino is built, Hard Rock will build a 30,000 square foot casino (planned opening second quarter of 2022) at the former Bristol Mall. It will feature 900 gaming slots, 20 tables for gaming options, a new restaurant, sports bar, and sportsbook.

The permanent casino (planned opening mid-2023 to early 2024) will be 90,000 square feet, cost about \$400M, create 2,000 jobs once fully operational, and 1,500 indirect jobs. It will have 2,700 slots, over 100 gaming tables, seven restaurants, four bars, a 3,200-seat performance venue, 20,000-person capacity outdoor entertainment venue (arcade, VR games, go-kart racing, kid’s waterpark, mini golf, baseball & golf simulators), convention & conference center (50,000 square feet) and retail space (30,000 square feet) for 50 stores/restaurants. It will open with 300 guest rooms and suites before expanding to 750 guest rooms. Once operational, it is expected to bring \$21M in annual tax revenue for Bristol.

2. New Development

Development of 350 acres adjacent to the Pinnacle into an entertainment district with hotel, indoor water park, amusement park, and amphitheater.

Johnson City

8th largest city in TN (approx. 71,000). The Johnson City MSA has a population of 205,000).	Economic hub largely fueled by East Tennessee State University and the medical “Med-Tech” corridor.	Tannery Knobs Bike Park is one of JC’s primary attractions.	Visit Johnson City also promotes USA Raft Adventure Resort (located 15 miles away).
JC has very similar aspirations when compared to Kingsport (continue investment in outdoor attractions to make JC a “destination city,” continue downtown district investment and redevelopment, promote bike trails and seek to expand other outdoor recreation locations (Johnson City Strategic Plan 2020-2025).			Home to 18 hotel properties.



Gatlinburg
Knoxville
Pigeon Forge
Morristown
Murfreesboro
Chattanooga

Gatlinburg (approx. 100 miles/2 hours from Kingsport) - population 3,700

Attractions

Mountain resort city and hub of family entertainment, including numerous adventure parks.

Home to Ober Gatlinburg (only ski resort in the state).

Recently ranked #1 Trending Destination in the U.S. and #4 Trending Destination in the World by TripAdvisor.

Rated #1 Best Mountain Town to Visit in the USA (US News and World Report, Best Vacations).

Incredibly detailed Visitor Guide.

Rocky Top Sports World: Award-winning 80-acre indoor (86,000 square feet including 6 basketball courts and 12 volleyball courts) and outdoor (7 fields) sports complex located minutes from Gatlinburg.

Knoxville (approx. 100 miles/1.5 hours from Kingsport) - population 190,000

University of Tennessee athletics, minor league baseball, professional hockey, Women's Basketball Hall of Fame, etc. highlight the various sport-related attractions.

Exceptional selection of outdoor recreation activities.

Pigeon Forge (approx. 95 miles/1.75 hours from Kingsport)

Numerous outdoor and indoor attractions, including shows, whitewater rafting, ziplining, go-kart racing, shopping, etc.

Visitor guide and Pigeon Forge Chamber website markets the trio of Pigeon Forge, Gatlinburg, and Sevierville (along with the Great Smoky Mountains). This is similar to the potential "Tri-Cities" brand mentioned by Bristol residents.

Morristown (approx. 60 miles/1 hour from Kingsport)

Morristown Landing, a 100,000 square foot multi-purpose recreation and events center (including a 10-lane competition pool), is slated to open in Summer 2022.

Murfreesboro (approx. 275 miles/4 hours from Kingsport)

Murfreesboro is a growing competitor of Kingsport due to its increased engagement in sports tourism by building a new youth and amateur sports complex, and its convention space.

Chattanooga (approx. 200 miles/3 hours from Kingsport)

Named one of the "Top 45 places to go" in the World by the New York Times.

Named one of the "Top 45 places to go" in the World by the New York Times.

Premier outdoor destination that attracts hikers, bikers, kayakers, boaters, and fishing enthusiasts.

Chattanooga Sports engages more than 90 different events annually across 35 types of sports.

Launched a new Cultural Tourism Advancement Grant in 2021 to "support promotion, development and cultivation of tourism-related festivals, events, programs, services or projects."



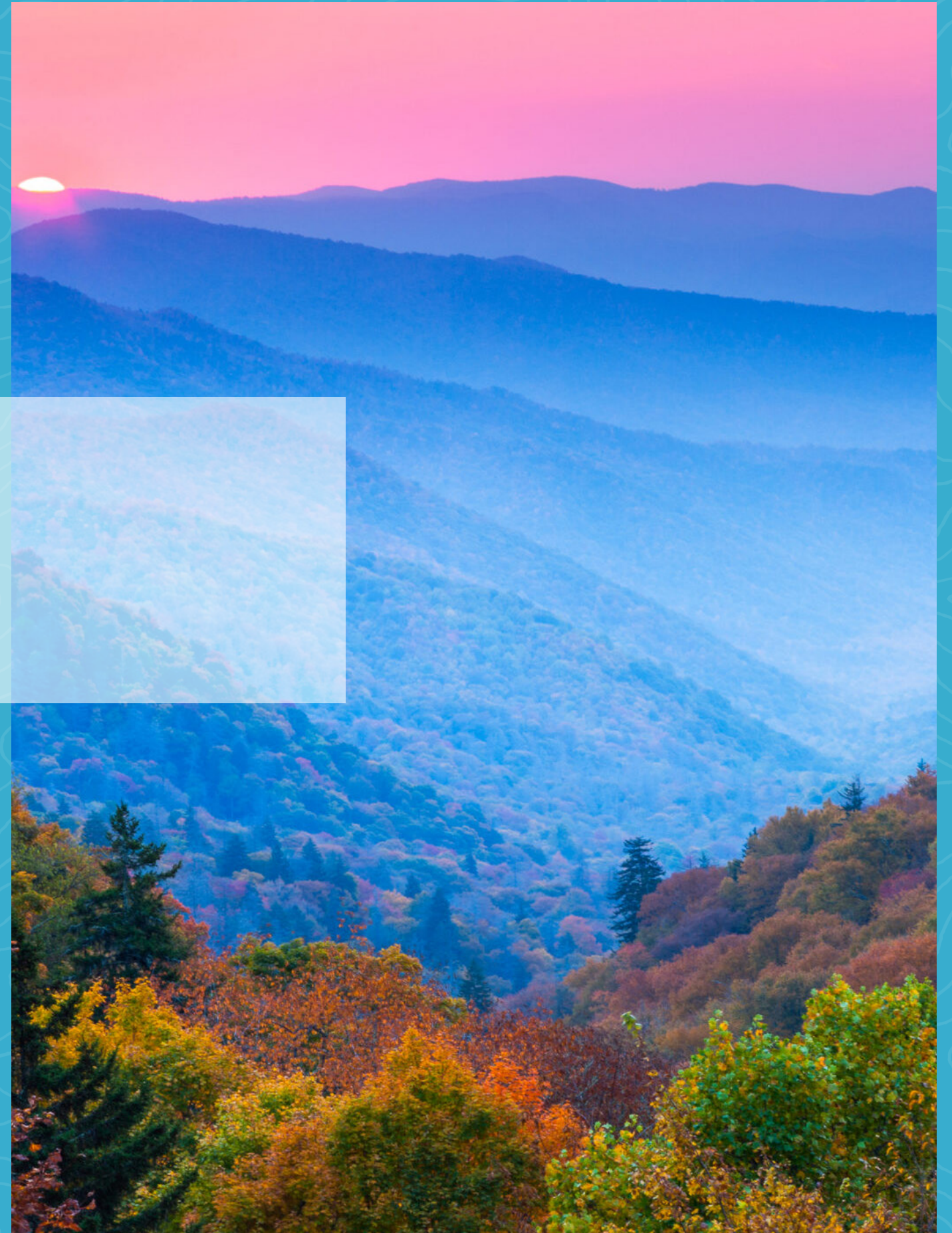
Risk Assessment Key Takeaways

- + Increased competition at regional and national level
- + Projected delayed recovery of business and corporate travel sector
- + Current economic climate and inflation impacts
- + Subsidy of non-revenue generating programs with tourism revenues
- + Long-term sustainability of Visit Kingsport's current business model
- + Future leadership changes at Visit Kingsport and/or the Kingsport Chamber



SECTION 7

VISIT KINGSPORT ORGANIZATIONAL PROFILE



Core Business Units



Tourism

Includes all aspects of visitorship and markets of traditional tourism: Corporate, Groups, Leisure, Meetings, Sports, Etc.



Community Events

Includes all community events owned/operated/managed by Visit Kingsport such as Fun Fest, Racks by the Tracks, Wing Fling, Downtown Concert Series, etc. Note: these are not primary tourism-recruited events.



Program Management

Non-tourism or event programs with financial and management oversight by Visit Kingsport, including Move to Kingsport and Downtown Kingsport Association.



Marketing/Communications/Branding

Marketing/communications/branding plays an important role in supporting all other Visit Kingsport business units.

Target Market Analysis

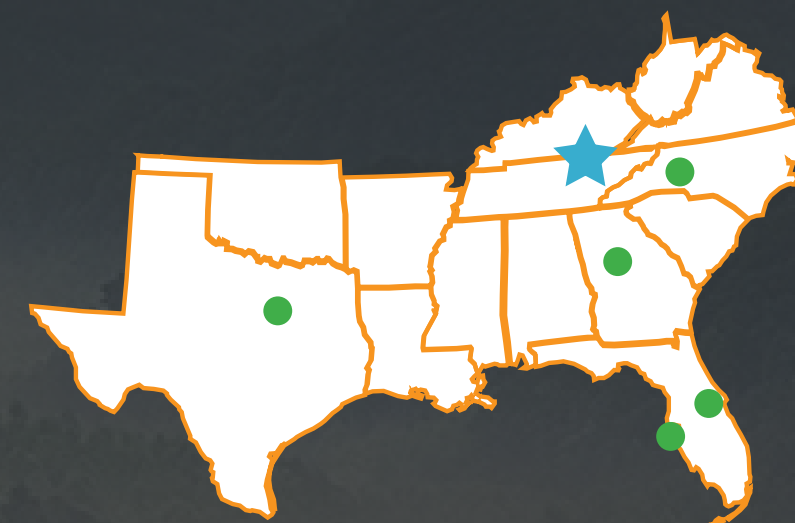
Limited information exists about target and secondary markets related to Visit Kingsport's Core Business Units. As Visit Kingsport proceeds in implementing this Strategic Roadmap, the team will collect data useful to identify and define target markets for each unit. These markets will be determined based upon factors such as demographics (age, race, gender, family, location, marital status, education, income, religion, occupation, etc.) and psychographics (personality, social status, lifestyle, attitudes, interests, etc.). This information can also be used if and when Visit Kingsport decides to pursue any rebranding effort.

In the interim, Visit Kingsport should leverage known markets based upon geography to promote its Core Business Units:

Air Service Markets

Tri-Cities Airport: Full-service commercial airport serving Northeast Tennessee, Southwest Virginia, Western North Carolina, and Eastern Kentucky

Offers non-stop flights to five hubs: Atlanta, Charlotte, Dallas/Fort Worth, Orlando-Sanford, and St. Petersburg-Clearwater on Allegiant, American, and Delta



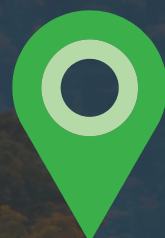
Drive Markets

Non-Tennessee major cities within 300 miles include: Cincinnati (OH); Asheville, Raleigh, Charlotte, Winston-Salem, Greensboro, Fayetteville (NC); Louisville, Lexington, Bowling Green (KY); Charlottesville, Roanoke (VA); Atlanta, Augusta (GA); and Columbia (SC)

Other market information Visit Kingsport can use while collecting more robust data includes event registration, ticket buyer information, relocation data, etc.

Aspirational Target Markets

These aspirational target markets were selected based upon approximate community size and cultural characteristics, rather than geography.



Key Take Aways

Target and secondary markets for Core Business Units will evolve as additional data is gathered.

Future organizational branding efforts would benefit from additional market data.

Core Values



Ambassadorship

Serving as integral representatives of all the positive attributes of Kingsport both internally and externally to the community.



Excellence

Conducting every aspect of the business with the highest-level performance and integrity coupled with the expectation of success.



Adaptability

Learning and adjusting to meet the ever-changing landscape of demands and opportunities within the Kingsport community and industry.



Stewardship

Responsibly caring for all resources – financial, human, community, etc. – entrusted to Visit Kingsport and their deployment to the organization's business units and the community.



Building Community by:

1 Driving economic development

2 Enhancing quality of life

3 Powering exposure and awareness

Building Community by Driving Economic Development

It is commonly understood that Visit Kingsport's leadership in the community's tourism efforts drives non-local individuals to visit Kingsport; however, what is often short-changed in examining that work is its vital importance in driving overall economic development for the community.

Visitors who come and stay in Kingsport accommodations not only directly contribute to lodging tax revenue generated from lodging room nights but is often forgotten is those visitors also contribute significantly to the city, county, and state sales tax base.

At an Average Daily Rate of \$110 per night in Kingsport, a visitor will contribute the following direct revenue into municipal and state coffers:

Tax Type	Tax Rate	Direct Revenue from One \$110 Room Night
City of Kingsport Sales Tax	0.25%	\$0.28
Sullivan County Sales Tax	2.25%	\$2.48
City of Kingsport Lodging Tax	7%	\$ 7.70
	Total Local Tax Revenue	\$10.45
State of Tennessee Sales Tax	7%	\$ 7.70
	Total Tax Revenue	\$18.15

The reason this is important is these tax revenues are used by authorities to 1) drive more tourism, and 2) subsidize the cost of resources and amenities enjoyed by the local populous, such as parks, infrastructure, safety, etc.

It is often said that if tourism did not exist, the local population would have to pay the difference in tax revenue to make up that deficit. While the intention of that statistic is true, a more accurate way to view it would be that the local populous would not pay any additional taxes, they just simply would not have access to the same level of amenities. This is the essence of tourism's role in driving broad-based economic development.

As articulated at the 2021 Tennessee Governor's Conference on Tourism by Tennessee Department of Tourist Development Commissioner, Mark Ezell, "Tourism is economic development." (Emphasis added)

Building Community by Enhancing Quality of Life



While the primary aim for Visit Kingsport is to increase visitors, the purpose is to subsidize the amenities that make Kingsport a place where people want to work, live, and play – enhancing quality of life. These dollars make it feasible for new businesses to thrive, including restaurants, attractions, and venues – all enjoyed by locals, but subsidized by temporary visitors.

Another unique aspect of Visit Kingsport is not only does the organization leverage tourism to enhance quality of life among the local populous, but they are also paramount in putting on several events enjoyed by Kingsport residents as well. These events include Fun Fest, Racks by the Tracks, Wing Fling, the Downtown Concert Series, and the 4th of July festivities. Certainly, there is some visitor participation in these events, but by-and-large, most people enjoying these community staples are Kingsport residents. These events contribute to the sense of community in Kingsport and are integral to why Kingsport is such a great place to work, live, and play.

Building Community by Powering Exposure and Awareness

Tourism brings visitors to a destination with which they may not be significantly familiar. It provides exposure to the community and shapes the image and impression of the community. At times, when a meeting, sporting event, or convention is scheduled in a destination a visitor would not have otherwise selected, it can even be default tourism (i.e., "I'm only going there because it is on the schedule of an activity or organization with which I am associated"). Any way you slice it, tourism provides a key conduit of exposure and awareness of the community.

Visit Kingsport plays an even more integral role in building community through its management and oversight of the Move to Kingsport and Downtown Kingsport Association programs. Not only does Visit Kingsport provide sound financial oversight of those programs, but these programs also have a direct link to how exposure – whether through a visit, word of mouth, or media exposure – impacts relocations to Kingsport. Visit Kingsport provides an excellent conduit of exposure to downtown businesses, which display the true essence of the community.

"Tourism is the front door to economic development."

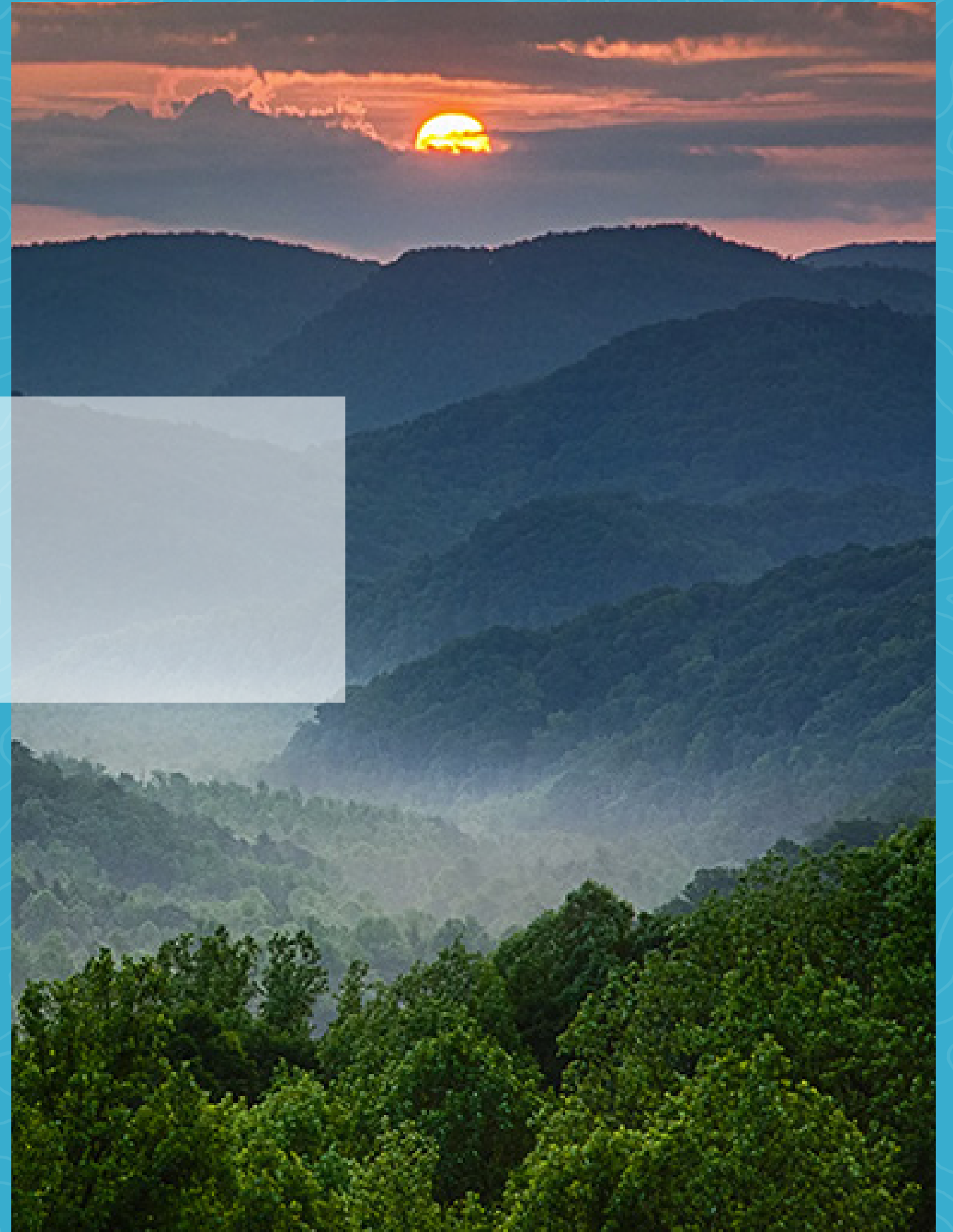
– Oklahoma Lt. Governor Matt Pinnell





SECTION 8

DEFINING SUCCESS





Strategic Priorities

1

Strategic Recovery and Growth

Strategic recovery from the pandemic impacts and growth is the primary strategic priority for Visit Kingsport. Focus needs to be on not only recovering to 2019 metric levels, but also mitigating risk associated with increasing competition, and expected temporary ADR impact by the opening of new hotel properties in market and in the Tri-Cities area. The landscape of the broad tourism industry continues to shift, and as such, Visit Kingsport must respond appropriately.

2

Leverage Brand Perception and Awareness

Visit Kingsport enjoys an excellent reputation internal to the community; however, some confusion exists as to the specific role the organization plays in the community and when and why they are involved in certain initiatives. Visit Kingsport needs to spend concerted and continual effort communicating with the local populous.

Likewise, Visit Kingsport has a solid reputation external to the community as well. Similar to internal communications, continuing to reinforce Kingsport's positive attributes, both for tourism and non-tourism programs, is key. Brand perception and awareness for traditional tourism markets such as meetings, sports, and groups, can be refined to emphasize exceedingly quality business. Brand perception and awareness should also be used as a lower-lift entry point to focus intentionally on the growing leisure market.

3

Embrace Organizational Innovation and Efficiency

As pandemic recovery is realized, it is a fantastic opportunity for Visit Kingsport to turn over every rock and evaluate why they do what they do, and how to find incremental efficiencies in their business operations. For example, a variety of research and data resources are on the market aiding DMMOs refine their approach to understanding the marketing and management of destinations. Visit Kingsport uses Smith Travel Research (STR) reports to analyze hotel metrics, but additional tools can assist in measuring social and traditional media impact, visitor intelligence and behavior, and short-term rental data. Simple information regarding who is coming to Kingsport and what they are doing while there can take some of the pressure off the traditional sales call model.

4

Cultivate Long-Term Sustainability

Visit Kingsport does an outstanding job managing expenses but must start cultivating revenue generating opportunities to keep up with the competitive landscape, especially when subsidizing non-tourism initiatives. In 2019, the organization's lodging tax yield was just shy of 83%. Assuming economic experts are accurate and hotel demand recovers latter in 2022, yield growth will be incremental. Therefore, Visit Kingsport must be cognizant of pushing ADR higher to match inflation and avoid continual subsidy of new and existing non-revenue generating programs with lodging tax dollars.

Strategic Recommendations

Below are six Strategic Recommendations (three Primary and three Secondary) based upon the Strategic Priorities on the previous page. The difference between Primary and Secondary Strategic Recommendations is the ability to leverage revenue preservation and generation. The three Primary Strategic Recommendations directly generate or preserve revenue, while the three Secondary Strategic Recommendations focus on long-term sustainability and organizational efficiency.

Primary Strategic Recommendations:

1. Filter future business opportunities – across all business units – through the Visit Kingsport Business Opportunity Scorecard.

- + It is paramount Visit Kingsport implement **a method of evaluating** business opportunity efficacy.
- + This process will immediately allow for **pause, constructive discussion, and objective evaluation** of business opportunities that arise from within the organization, or outside of the organization.
- + See **Scorecard** for instructions and parameters.
- + Present and refine Scorecard with input of staff, board members, and key stakeholders to ensure **broad-based buy-in to the process** and adherence.
- + Tweak on an **annual basis** to suit the dynamic needs of the organization.

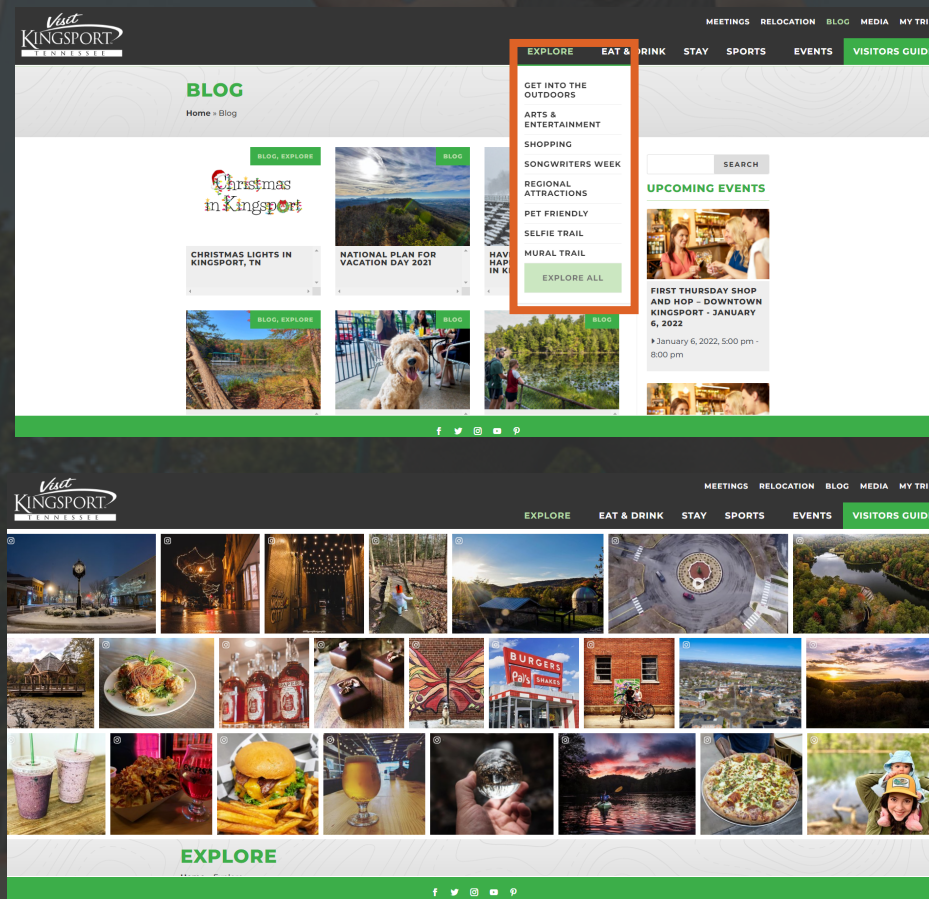


2. Embrace leisure travel as an important tourism sector to cultivate.

+ Historically, leisure travel has not been an area of focus for Visit Kingsport. As leisure travel increases across the country and corporate/group business continues to lag, focus on leisure can be **a gap-fill given Kingsport's wide area of leisure assets** (i.e., Bays Mountain, parks, outdoor recreation, river, etc.) with the least amount of staff "lift".

+ Reasons it may not be a current focal point is the difficulty measuring leisure travel and the lack of incentivization for cultivating leisure travel. Nonetheless, tourism experts agree that **leisure travel has increased throughout the pandemic and is here to stay**. Therefore, since the size of the "pie" of leisure travel has increased, Visit Kingsport would be wise to embrace and dedicate resources (human and financial), to attracting, leveraging, and measuring leisure activity.

+ In fact, leisure creates a nice **add-on to existing tourism segments** (i.e., groups, meetings, sports, etc.) as travel behaviors of consumers are changing among those groups as they lean toward experiences, stay extra days, and bring family. Visit Kingsport's website is populated with significant information for and content by leisure travelers, which creates a great head-start (i.e., Homepage content, "Explore" tab, "Eat & Drink" tab, and Crowdriff images.



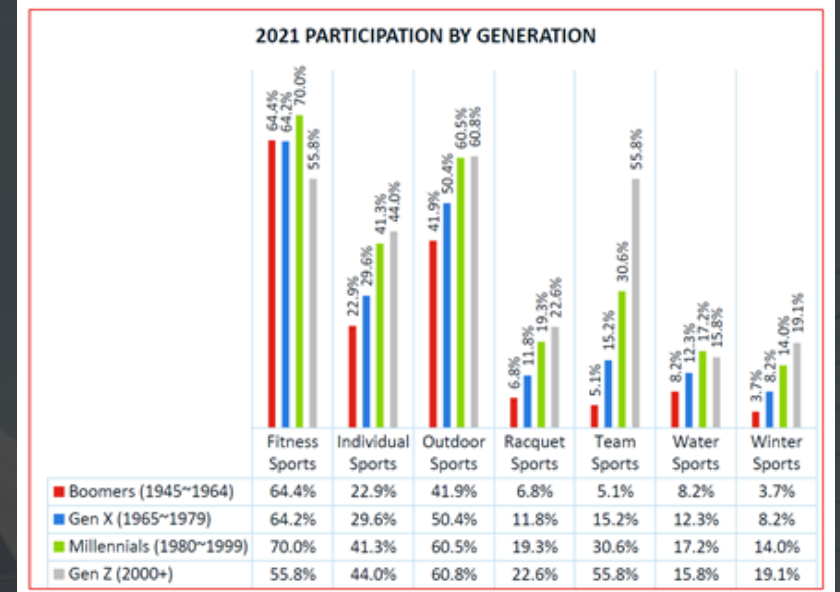
+ In sport, for example, the Sports Fitness Industry Association has noted the **significant increase in active participation of sports** such as water sports (fishing, kayaking,

+ It is true that many of Kingsport's competitors also have leisure amenities, such as rivers, events, and restaurants; however, **drive market travelers are looking for a variety of experiences** and are not going to the same location every weekend, so Kingsport needs to establish itself as a viable destination for these travelers.

+ This effort will also lend itself to **refined visitor intelligence and incremental lodging tax yield**, which is essential in the long-term roadmap for Visit Kingsport.

Participation by Generation

U.S. Population Aged 6+



Source: Sports Fitness Industry Association Sports, Fitness, and Leisure Activities Topline Participation Report (2022)

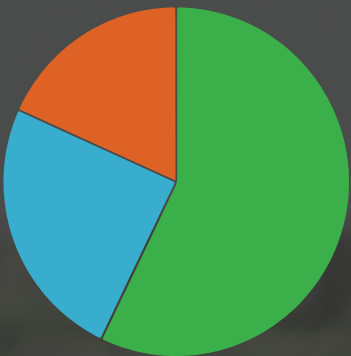
3. Focus on improving tourism business quality.

- + When it comes to the tourism business unit, Visit Kingsport has a history of fantastic yield, hitting nearly 83% occupancy in 2019 and recovering on par with industry expectations. However, maintaining or moving the needle from 83% to even 87% or 85% will prove more and more difficult as competition increases, and recovery trends become norms. Therefore, Visit Kingsport must **shift its focus to higher quality tourism business among traditional segments** (i.e., corporate, groups, meetings, sports).
- + Higher quality tourism business will require **continued evaluation and hustle** not to rest on laurels of existing pieces of business. It will likely require trading some lower value existing business for higher-value future business.
- + While there are many factors that contribute to the concept of business quality, it can be most simply distilled for Visit Kingsport’s purpose to **room night yield and annual vs. one-off business**. As expected, it’s always easier to keep business than find new business, but we challenge Visit Kingsport to embrace a CQI (Continuous Quality Improvement mentality).
- + Below is a simple matrix through which Visit Kingsport staff can **evaluate tourism business quality**, with Tiers 1 and 2 being ideal, Tiers 3 and 4 being acceptable, and Tiers 5 and 6 being business to avoid.

Quality Tourism Business Matrix			
Business Room Night Yield	High	Tier 1	Tier 3
	Medium	Tier 2	Tier 4
	Low	Tier 5	Tier 6
Preferred business is Tier 1 or Tier 2. Followed by Tier 3 or 4. Tier 5 or 6 should be avoided.		Annual	One-Off
		Type of Business	

Scale developed to assess quality of business that can be overlayed with overall community capacity (see Primary Recommendations for full breakdown)

- o Tier 1 and Tier 2 = Most preferred business
- o Tier 3 and Tier 4 = Less preferred business
- o Tier 5 and Tier 6 = Business to avoid



Breakdown of 2022 Community Capacity business

- o 57.14% of community events are Tier 1 (9.52%) or Tier 2 (47.62%)
- o 24.60% of community events are Tier 3 (15.87%) or Tier 3 (8.73%)
- o 18.25% of community events are Tier 5 (15.87%) or Tier 6 (2.38%)

Occupancy Yield in 2019 was 83%

This means that QUALITY of tourism business over QUANTITY is important.

- o Lots of gap capacity on the calendar now, but likely not the case in 2019.
- o As recovery mounts, those Tier 1 and Tier 2 numbers must go up.

The closer Visit Kingsport gets to 2019 numbers, the more important it will be to cultivate additional revenue streams.

Other option is to operate within existing bounds – but not advising that as expected constriction of market yield is likely looming.

Secondary Strategic Recommendations:

Secondary Strategic Recommendations will greatly improve the insights and efficiency of Visit Kingsport, yet they do require some level of investment (time and/or financial). We are confident that strategic investment in these initiatives will produce business returns if implemented purposefully.

4. Invest in and implement business intelligence tools that create organizational efficiency and drive business insights.

- + It is worth noting, that although categorized as a Secondary Strategic Recommendation, this recommendation **will feed the three Primary Strategic Recommendations already discussed**. It is purely categorized as Secondary as it will require diligence to review tools that will have the highest return on Visit Kingsport and require investment. We cannot overstate the long-term importance of increased business intelligence.
- + A **robust visitor intelligence platform** will enable Visit Kingsport to segment its target and secondary markets for all consumer segments, collect important demographic and psychographic information on these markets, and leverage those insights to communicate with high-yield targets more effectively and efficiently.
- + Another element to consider is implementing an **organizational Customer Relationship Management (CRM) system**. This would be advantageous not only to track contacts, leads and bookings, but also to preserve institutional knowledge for the long-term future of the organization.
- + Visit Kingsport should consider **an RFQ and/or RFP process** for evaluating and negotiating with platform provider(s).
- + These tools could also be used to inform a more **comprehensive branding effort** in the future.

5. Continue to concertedly evangelize Visit Kingsport's role and successful outcomes in the local market.

- + While it is unrealistic to expect all residents to 1) know all programs/events/etc. for which Visit Kingsport is responsible and 2) understand the broader benefit to the local community, **there must be a consistent and continual steady drumbeat led by Visit Kingsport** and its key stakeholders to communicate these facts.
- + Communication of the importance of Visit Kingsport's work should be wide and varied in the local community, and should not only tell about the work, but **demonstrate the results and put stories behind what these results means for those in the community**. This is especially important for initiatives such as Visit Kingsport's events and non-tourism programs.
- + Demonstrating the value can be done through **measurement and communication of the metrics forthcoming in this report**; however, it is essential that these be woven into stories that clearly show the community WHY these efforts matter to them personally.
- + **Visit Kingsport's Annual Report** is a great example of an existing opportunity to expand on the work of the organization and how it is supporting the core pillars that make Kingsport a place people desire to work, live, and play.

6. Proactively plan for and address current and future human capital needs.

- + Succession Planning.** With a long-tenured, successful, and respected executive at the helm of Visit Kingsport, it should be the organization's council's prudent responsibility to begin to cultivate a long-term succession plan. By no means is this recommendation made to accelerate a timeline, rather to take the pressure off the council, staff, and organization when formal succession becomes reality. Proactively planning for succession should include consideration of the relationship with the Chamber – and its own potential succession planning – as well as an effort to ensure future staff and fiduciary stability of the organization.
- + Marketing and Communications.** Due to the varied nature of Visit Kingsport's core business units, the organization is especially taxed when it comes to marketing and communications. There is currently a strong member of the team in this area, leading marketing efforts for the diverse segments of tourism alone is a lot for one person to take on, not to mention the revenue-dependent community events, and additional community programs that require marketing and communications bandwidth. Although additional marketing personnel requires financial investment, with the right tools and evaluation metrics in place, we believe these costs – though diffused across all of Visit Kingsport's core business units - would likely cover themselves in net revenue gain (for example, in lodging tax increase and/or event revenue increase).
- + Events Team.** As Visit Kingsport continues to expand its event portfolio - including bid-on and owned/operated/managed events - leaders should consider establishing a pool of qualified and trustworthy event subcontractors to assist with the event lift. This approach would allow for "flexing up" of the events team when needed at a lower cost than hiring additional staff and help it preventing event staff burnout that is common in the industry.
- + Data Analysis.** Visit Kingsport will continue to recover from the pandemic strongly, and as the organization implements the recommendations in this Strategic Roadmap, the business decisions and messaging will become increasingly derived from intelligence and insights. Many DMMO organizations are finding success bringing individuals on staff who can parse the data into insights that drive business decisions in a clear and understandable way. Jeff Flemming accomplishes a very similar role for Move to Kingsport, and the same approach can be extended into Visit Kingsport's other core business units.



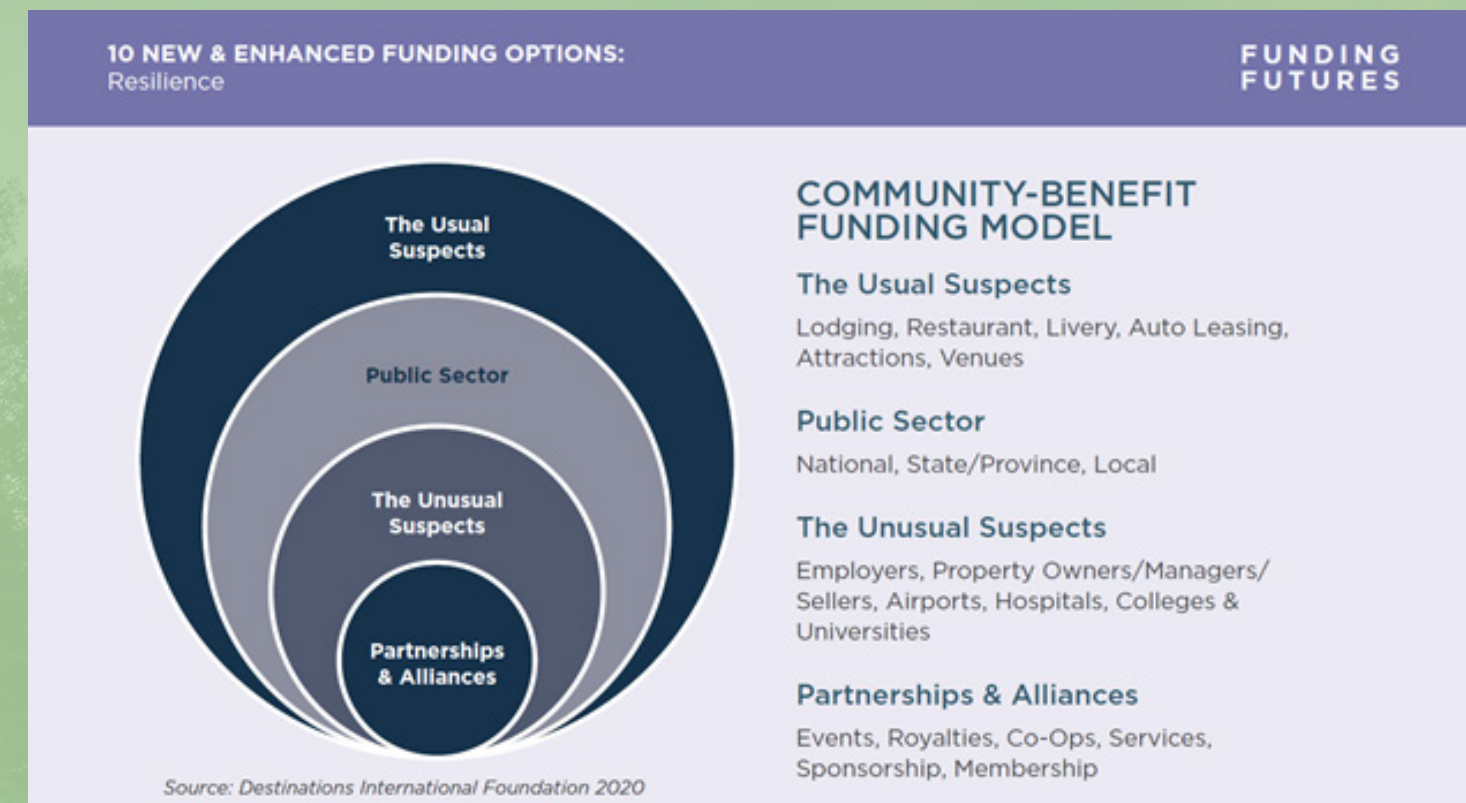
Potential Funding Mechanisms

Immediate and incremental



Broader-thinking funding trends (Funding Future 2020 Report)

- + Rolling average funding to flatten curve
- + Tax increment funding (TIF)
- + Tax improvement district (TID)
- + Tourism recovery district (TRD)
- + Diverse districts such as wine, culinary, venue, etc.
- + Co-op funding
- + Growth in Short Term Rentals coinciding with leisure/sport market demand





Because of Visit Kingsport's broad-reaching role in the community, we recommend expanding the metrics of success to better demonstrate the true value the organization provides to the Kingsport community. These are not intended to replace existing hotel room night/lodging tax metrics, rather to expand upon them and provide deeper understanding of performance and fuel new ways to tell Visit Kingsport's story. While occupancy data and some specific event-related data is already tracked by Visit Kingsport, other of these metrics are new and therefore tracking them over the course of a fiscal year would be recommended to establish a baseline that can be used for future goal-setting.

Proposed metrics for tracking include the following and could be tracked year-over-year in one master spreadsheet allowing for trend reporting and future projections:

Economic



Hotel

+ Occupancy rate
+ Lodging Tax Revenue
+ Average Daily Rate



Direct Spend/ Economic Impact

+ City/State/County Sales Tax revenue generated from lodging



Traditional Media

+ Traditional Media Value
+ Earned Media Value



Digital/ Social Media

+ Website Analytics
+ Social Platform Analytics

Social



Number of Volunteers



Volunteer Hours



Philanthropy/ Charitable Giving



Local Sponsorship

Other

- **Event Specific Data** (i.e., Registrants, attendees, sponsorship, zip code data, etc.)
- **Downtown Kingsport Association Specific Data** (i.e., Identify metrics such as membership, new business retention, engagement, etc.)
- **Move to Kingsport Specific Data** (i.e., Move to Kingsport does a fantastic job tracking metrics on migration/relocation. Continue to collect this information and overlay it with other Visit Kingsport initiatives such as target marketing for event attendance, etc.)
- **Legacy Data** (i.e., Number of teams/athletes utilizing the Miracle Field, Local teams/athletes participating in sports tourism events, etc.)



Key Takeaways

The goal for collecting more data is not to burden staff with more to do, rather to set up a simple method to reinforce the primary and secondary recommendations in this Strategic Roadmap.

Adopt a “keep it simple” philosophy on data collection – if it already exists or is easily accessible, track it! Otherwise, determine the priority and put a plan in place for the future when resources allow.



SECTION 9

SUMMARY





Visit Kingsport is fortunate to have fantastic personnel, tremendous assets, and a supportive community. The efforts of the staff and council have helped the organization weather the pandemic and emerge with an eye for the future. Visit Kingsport has all the foundational elements necessary for a bright future. This Strategic Roadmap is intended to guide the organization into the future given the shifts in industry trends and unique role Visit Kingsport plays in the community. It is intended to be a living document, dynamic in nature, and flexible to meet uncertainties of the future by continuing to develop the organization's Core Business Units in a sustainable and fiscally responsible way. However, the best laid plans are only as good as the level of buy-in they garner. We encourage Visit Kingsport staff, council, and stakeholders to join in support of the recommendations outlined in this Strategic Roadmap as a path forward. We are here to come alongside, offer insight and expertise, and cheer on Visit Kingsport's many future successes.



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