



# RURAL KINGSTON ECONOMIC DEVELOPMENT STRATEGY:

Mobilizing Opportunities for  
the Greater Kingston Region

City of Kingston

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# Foreword

The Rural Kingston Economic Development Strategy has been developed as a separate component of the Kingston Integrated Economic Development Strategy. Listed as a Council Strategic Priority, strong and resilient rural community development is integral to the City of Kingston's economic health. This report outlines a series of recommendations to foster growth in Kingston's rural areas from an economic development perspective. Recommendations included in this report are also included in the Kingston Integrated Economic Development Strategy.

## REPORT METHODOLOGY

As part of the secondary data analysis, a total of 35 historical City of Kingston reports were reviewed, along with the collection and analysis of more than 9,500 data points. This process has included the following assessments:

- Asset Mapping;
- One-on-one Consultations with Key Stakeholders;
- a Quantitative Survey with Locals;
- a Global Trend Review; and,
- an Exemplary Jurisdiction Review.

Details on market trends, impacted sectors, strategy reports, and other substantive information have been considered in the formulation of the report's recommendations.

Conclusions are based on analysis of data at the time of the preparation of this report and are subject to change with market conditions. The evolving nature of the COVID-19 pandemic has made mid- to long-term forecasting a special challenge. To that end, baseline data (2019) and other available data (January 2020 to current) have been included and sourced to clearly date pre- and post-COVID information.

## STAKEHOLDER CONSULTATIONS

A total of 21 meetings took place with more than 30 participants during the development of this strategy.

Discussions included industry representation from agricultural, construction, public administration, and retail trade companies. Individuals from various stakeholder groups such as the Kingston Rural Advisory Committee were also included.

# Executive Summary

## **Rural Kingston is an asset in the City of Kingston and demonstrates promise for economic development potential.**

Rural Kingston is defined as the two completely Rural Census Tracts (CTs) within the city boundaries, as well as portions of three CTs that are a mix of urban and rural. These areas have an estimated population of 19,000, or approximately 15 per cent of the city's population spread across 83 per cent of the city's land area.<sup>1</sup>

A total of 35 historical City of Kingston reports were reviewed, and more than 9,500 data points were collected and analyzed as part of the secondary data analysis. The research process included: asset mapping (ARC-GIS datasets), one-on-one consultations with key stakeholders, quantitative survey through the Get Involved Kingston Platform, a global trend review, and exemplary jurisdiction review.

As a result of this extensive market research, seven themes and 14 recommendations have been developed as part of the Rural Kingston Economic Development Strategy Framework. The seven themes are: 1) Support Agricultural Activities and Businesses, 2) Plan Hamlet-led Development, 3) Explore Tourism Opportunities, 4) Develop Strategic Rural Business Clusters, 5) Adopt Process Improvement, 6) Assess Available Funding, and 7) Assess Servicing Requirements.

Agriculture Opportunities incorporate recommendations to support new and existing farmers in Rural Kingston. Tourism Opportunities include product development to build and leverage Rural Kingston landscape. Hamlet-led and Strategic Rural Cluster Development contain recommendations to support intentional development in Rural Kingston and the themes of Project Improvement, Funding Assessment, and Servicing Assessment are enablers to support the first four development themes.

The Rural Kingston Economic Development Strategy identifies potential opportunities to support economic prosperity in Rural Kingston, creating greater alignment between urban and rural economic development activities. Some of the seven themes and 14 recommendations will be realized in the next three-to-five years, and other recommendations targeted for long-term implementation (10 to 20 years).

By embracing an intentional, long-term development strategy, sustainable growth and development can take place in Rural Kingston. The overall goal is to achieve a win-win situation for all, balancing economic development potential and maintaining the overall Rural Kingston landscape that residents deeply value.

# About the Strategy

## PURPOSE OF THE STRATEGY

The purpose of this Rural Kingston Economic Development Strategy is to create intentional development in Rural Kingston that will leverage assets, industries, and opportunities in Rural Kingston. The goal of the strategy is to position the City of Kingston for short- and long-term sustainable economic development growth.

## TARGET OUTCOMES

**1** Industry growth in the identified core sectors within Rural Kingston

**2** Clustered development in identified areas within Rural Kingston

**3** A cohesive rural development approach to align with the overall vision(s) for the City of Kingston and Kingston Economic Development

**4** Identification of short-term rural development opportunities that can drive immediate results for overall economic development for the region

**5** Identification of long-term rural development opportunities that can support the long-term economic development plan for the City of Kingston

**6** Identification of short- and long-term rural development opportunities to support residents and residential growth in rural Kingston

**7** Identification of short- and long-term rural development opportunities to support business expansion, and potential investment attraction to the City of Kingston

## METRICS FOR SUCCESS

**1** Supports new business start-ups

**2** Offers business expansion potential

**3** Attracts investment

**4** Expands opportunities for R&D and innovation

**5** Supports newcomers and immigrant entrepreneurs

**6** Strengthens community engagement

**7** Leverages and builds infrastructure and assets

## OBJECTIVES

### SHORT-TERM (SIX TO 12 MONTHS)

1. Identify three developers interested in commercial and / or residential development in Rural Kingston.
2. Build collaborations with Kingston Economic Development and Tourism Kingston to align activities and action plans.
3. Build collaborations with Queen's University and St. Lawrence College to identify opportunities for funding, training, and workforce expansion potential to support growth in the identified sectors in Rural Kingston.

### MEDIUM-TERM (12 TO 36 MONTHS)

1. Develop and implement a plan to support agriculture in Rural Kingston.

2. Build collaboration and partnerships with the Planning Department, City of Kingston and align mandate, mission, and objectives to streamline process.
3. Develop and implement a plan to support tourism in Rural Kingston.
4. Build a business case to support investment in Rural Kingston infrastructure (e.g., broadband and site servicing).

### LONG-TERM (THREE TO FIVE YEARS)

1. Identify three to five strategic commercial and / or residential development projects to be launched within the next three to five years.
2. Identify two new investment attraction and / or foreign direct investment initiatives to be established in Rural Kingston.

# About Rural Kingston

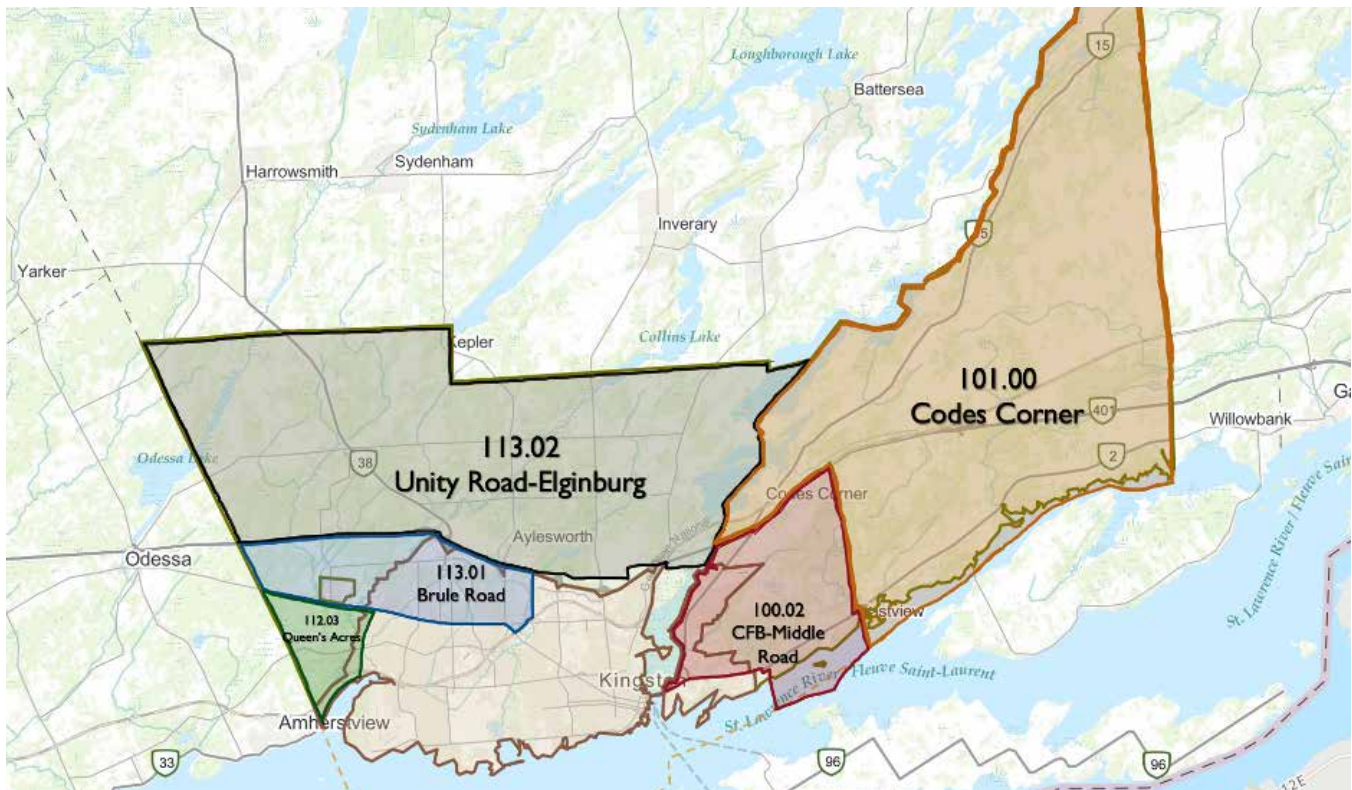
## BOUNDARIES

For the purposes of our analysis, Rural Kingston is defined as the two completely Rural Census Tracts (CTs) within the city boundaries, as well as portions of three CTs that are a mix of urban and rural. As defined by Statistics Canada, “a census tract is an area that is small and relatively stable. Census tracts usually have a population between 2,500 and 8,000 persons. They are

located in census metropolitan areas and in census agglomerations that have a core population of 50,000 or more.”<sup>2</sup>

In Rural Kingston, these areas have an estimated population of 19,000 (2016), or approximately 15 per cent of the city’s population spread across 83 per cent of the city’s land area.<sup>3</sup>

**Figure 1: Rural Kingston map by census tracts<sup>4</sup>**



Source: KMaps, 2020

Note: Rural Kingston here is defined as: Census Tracts 0113.02 and 0101.00 (the two fully rural CTs), 0113.01 (Dissemination Area 35100122 only), 0112.03 (excluding Dissemination Area 35100119) and 0100.02 (excluding Dissemination Area 35100321)

## **POPULATION AND GEOGRAPHY**

The City of Kingston is a thriving regional urban municipality located mid-point on the Montréal-Ottawa-Toronto corridor. The city has considerable strengths in post-secondary education, research and development, tourism, and health care. Kingston is also unique in that it has a large rural area within its city limits. Among the 54 census metropolitan areas across Canada with a minimum population of 100,000, Kingston ranks 49th for population density.<sup>5</sup> In Ontario, only Greater Sudbury and Chatham-Kent have less population per square kilometre. This rank is not due to a lack of a concentrated urban core, but due to Kingston's large rural area.

Most of Kingston's population lives in a relatively small area of the city. In fact, 84 per cent of the city's population lives in an area with a population density of more than 1,300 people per square kilometre; the rural population, however, is spread across an area with a density of only 51 people per square kilometre.

Figure 2 shows population density in selected Ontario cities compared to Kingston. Ottawa has a similarly large rural region and its approach to rural development has been reviewed, along with other similar jurisdictions across Canada, to aid in the development of this plan.

## **DEMOGRAPHIC SUMMARY: RURAL KINGSTON**

For the purposes of this report, Rural Kingston has been defined as the area north of Highway 401 and an area to both the east and west of the city outside of the urban core (Figure 1). Rural Kingston is home to approximately 19,000

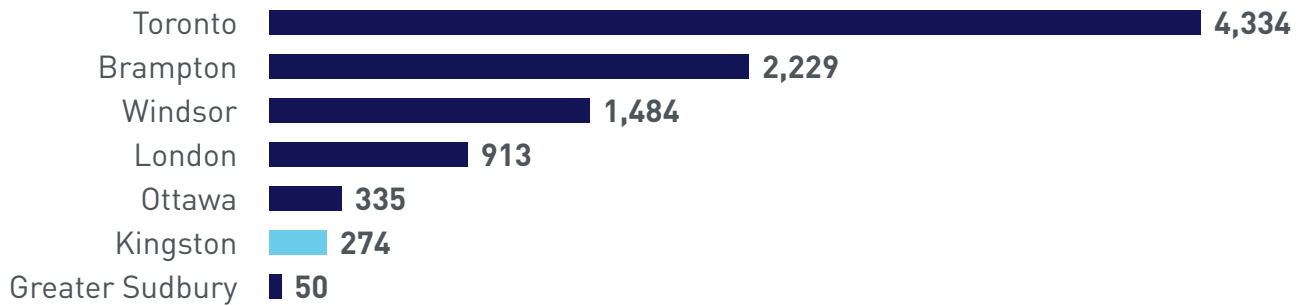
people or about 15 per cent of the city's total population. The two large and completely rural areas (not adjacent to the urban core) have a combined population of approximately 9,500.

The demographic highlights of Rural Kingston (2016)<sup>6</sup> include:

- The population in the fully rural part of Kingston has been declining moderately in recent years. By contrast, in the rural areas adjacent to the urban core, the population has been rising sharply.
- Rural Kingston is older than Urban Kingston. The fully rural parts of Kingston had a median age of 49.5 compared to 41.3 in the urban core.
- Rural Kingston enjoys higher income levels. Due to the greater number of two income households, median household income in Rural Kingston is 45 per cent higher than in Urban Kingston. Median personal income is 27 per cent higher in Rural Kingston.
- Most of the new housing built in Kingston during the past 10 years has been constructed in the area between the urban core and the rural area. On average, residential values are higher in Rural Kingston.
- More than 94 per cent of the 25-64 population in Rural Kingston have at least a high school education, with nearly 32 per cent holding a university degree and 11 per cent possessing a Master's degree or higher.
- Mainly because of the large farming sector, the self-employment rate in Rural Kingston is much higher (Figure 3).

Appendix A contains a detailed review of the population in Rural Kingston, including a comparison to Urban Kingston.

**Figure 2: Population per square kilometer, selected Ontario CMAs, 2016<sup>7</sup>**



Source: Statistics Canada, 2016 Census

**Figure 3: Self-employment as a share of the total workforce, 2016<sup>8</sup>**



Source: Statistics Canada, 2016 Census

## INDUSTRY AND COMMERCIAL SUMMARY: RURAL KINGSTON

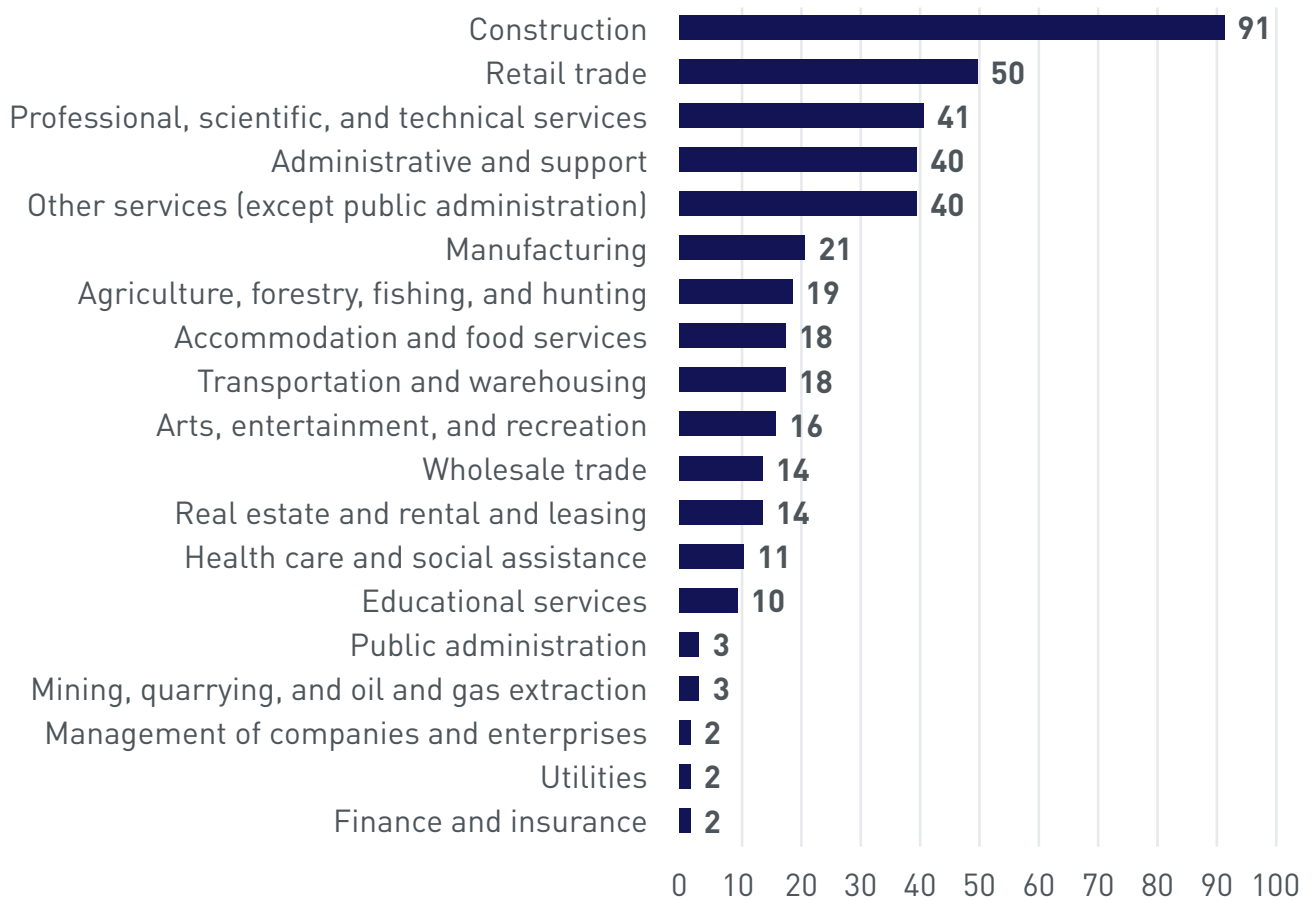
The Rural Kingston economy consists primarily of a relatively large number of construction firms and several farms. A smaller number of firms in retail trade, professional services, personal services, and other sectors are also located in the area. In addition, there is a significant Correctional Services Canada facility located in Joyceville.

As of June 2020, there were approximately 380 firms with employees operating in Rural Kingston, excluding agricultural businesses. The largest sector is construction, accounting for 91 of the firms, followed by retail trade (50), professional services (41), and personal services (40). More than 300 of these firms are in the fully rural area of the city (north and east of the urban core).

Figure 4 shows the breakdown of employer firms in Rural Kingston by major industry group.

More than 300 of these firms are in the fully rural area of the city (north and east of the urban core).

**Figure 4: Business establishments in Rural Kingston by main industry group, 2018<sup>9</sup>**



Stiletto Analysis, 2020

Farming accounts for another large subset of the Rural Kingston economy. Although 148 farms operate in the City of Kingston, only 29 of these farms had formal employment [i.e., with one or more employees] while the other 199 are defined as locations without employees. This theme includes the self-employed (i.e., those who do not maintain an employee payroll, but may have a workforce of contracted workers, family members, or

business owners, and have a minimum of \$30,000 in annual revenue].<sup>10</sup> Figure 5 shows the breakdown by farming specialization. The bulk of farms in Kingston are involved in cattle ranching and other animal production. There are several smaller soybean farms and hay farms, all of which are defined as businesses without employees.

Figure 5: Number of farms by type, Kingston, June 2020<sup>11</sup>

Activity	Without Employees*	Total, with Employees	Total Farms
Beef cattle ranching and farming, including feedlots	27	4	31
Dairy cattle and milk production	14	9	23
Soybean farming	13	0	13
Horse and other equine production	11	2	13
Animal combination farming	10	3	13
Hay farming	12	0	12
All other miscellaneous crop farming	5	3	8
Other grain farming	5	0	5
Other vegetable (except potato) and melon farming	4	0	4
Corn farming	2	1	3
Nursery and tree production	1	2	3
Sheep farming	2	1	3
Non-citrus fruit and tree nut farming	1	1	2
Other food crops grown under cover	2	0	2
Floriculture production	0	2	2
Fruit and vegetable combination farming	2	0	2
Apiculture	2	0	2
Other	6	1	7
<b>Total farms</b>	<b>119</b>	<b>29</b>	<b>148</b>

\*Non-employer farmers must have at least \$30,000 in annual revenue to be included in the table.  
 Source: Statistics Canada, June 2020

Appendix B provides a more detailed breakdown of the business / commercial / industry activity in Rural Kingston.

# Why Does Kingston Need a Rural Economic Development Strategy?

Many cities are encouraging the concentration of population and economic activity in the urban core. Reasons for this concentration are plentiful. Concentration can: lead to lower delivery costs for many public services; reduce a municipality's environmental footprint; and generate other economic, social and health benefits.<sup>12</sup> Most cities, however, do not have rural areas comparable to that within the City of Kingston. **The significance of Kingston's rural area reflects its position as a city asset. As such, Rural Kingston requires its own unique rural economic strategy.**

## LEARNINGS FROM OTHER CITIES

There are other Canadian cities with large rural areas (e.g., Clarington, Ottawa, Greater Sudbury, Halifax, Saint John, and St. John's). These cities have moderate guidelines for rural development that are helpful in the development of the Rural Kingston plan. For example, most are encouraging rural population concentration in hamlets / rural communities rather than a highly dispersed population. Halifax is encouraging the development of industrial / commercial activity in rural industrial parks. Halifax is unique in that it has targeted 25 per cent of its growth to rural areas.

Of these communities, only Ottawa has a formal, separate plan focused on economic development in its rural area. The plan includes efforts to encourage development in specific hamlets / rural communities, foster entrepreneurship, invest in infrastructure, encourage new population including immigrants to settle in rural communities and promote new housing options to better accommodate the senior's population.

Appendix C summarizes the approach to rural development in several other Canadian cities with large rural areas.

## A COORDINATED STRATEGY IS NECESSARY

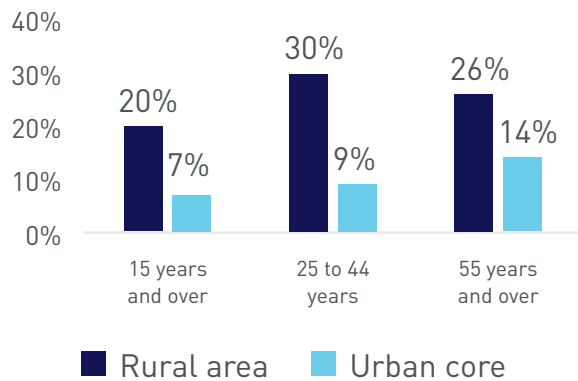
Capitalizing on the opportunities within Rural Kingston will be easier if there is a framework for population growth and economic development. Kingston can thereby guide the composition of residents in its rural areas. In addition, the growing population of retirees and the attractiveness rural living is leading to growth in rural areas across Ontario, particularly those within urban regions.

Across many Ontario Census Metropolitan Areas and Census Agglomeration areas (CMAs / CAs), the rural population is growing faster than the urban core population. Between 2015 and 2019, the population aged 15 and older living in the rural part of the province's CMAs / CAs increased by 20 per cent compared to only a seven per cent growth rate in the urban core (Figure 6). Among the population aged 25-44, the rural

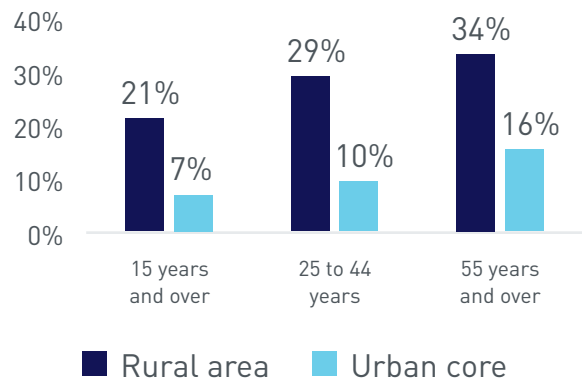
population growth rate was 30 per cent and, among those aged 55 and older it was 26 per cent. And people are not just retiring to rural parts of CMAs / CAs. The labour force living in rural parts of CMAs / CAs has also increased much faster in rural areas than in the urban core. There has been a 21 per cent increase in the rural labour force, compared to a seven per cent increase in the urban core in the past five years.

**Figure 6: Comparing urban and rural population growth inside Ontario's urban centres, 2015-19\*<sup>13</sup>**

Population 15+ growth rate, 2015-2019  
Ontario urban centres combined



Labour force growth rate, 2015-2019  
Ontario urban centres combined




\*Census Metropolitan Areas and Census Agglomeration areas  
Source: Statistics Canada Table: 14-10-0106-01

The rural population and labour force living in Ontario's CMAs / CAs is still only eight per cent of the total (the urban core is home to 89 per cent of the total CMAs / CA population and labour force). As a result, in absolute terms, the urban population is expanding faster than rural areas. Rural population growth is forcing cities to decide the quantity and quality of development outside of the urban core.

## THE IMPACT OF COVID-19

The COVID-19 pandemic has further increased the popularity of rural communities and smaller towns. According to a survey conducted on behalf of RE/MAX Canada, 32 per cent of Canadians no longer want to live in large urban centres, and are investigating rural and suburban communities. Of survey respondents, 44 per cent said they would like a home with more space for personal amenities, such as a pool, balcony, or a large yard.<sup>14</sup>

Changes in demand for rural real estate and land since the COVID-19 pandemic support these findings. In many rural Canadian areas, real estate markets have made dramatic rebounds, particularly in recreational housing (e.g., cottages).<sup>15</sup> Rural areas surrounding Kingston, boasting comparative affordability and space, should be able to leverage this trend to boost population in its rural areas.



Rural population growth is forcing cities to decide the quantity and quality of development outside of the urban core.

# Guiding the Development of a Rural Strategy

The Province of Ontario's Provincial Policy Statement, as well as the City of Kingston's Official Plan (OP) 2019, provides guidance as to what kinds of development might be expected in Rural Kingston.

## PROVINCIAL POLICY STATEMENT, 2020

In June 2020, the Provincial Policy Statement (PPS) was updated. The Provincial Policy Statement provides direction on matters of provincial interest related to land use planning and development. The PPS "provides for appropriate development while protecting resources of provincial interest, public health and safety, and the quality of the natural and built environment. The Provincial Policy Statement supports improved land use planning and management, which contributes to a more effective and efficient land use planning system." The PPS provides overarching direction for planning and development, within several general themes.

## SETTLEMENT-FOCUSED DEVELOPMENT

The Provincial Policy Statement states that in rural areas within municipalities, rural settlement areas shall be the focus of growth and development and their vitality and regeneration shall be promoted.

## SUSTAINABLE AND DIVERSIFIED TOURISM

Further, the PPS encourages "sustainable and diversified tourism, including leveraging historical, cultural, and natural assets;" "accommodating an appropriate range and mix of housing in rural settlement;" and "promoting diversification of the economic base and employment opportunities through goods and services." The PPS states that "recreational, tourism and other economic opportunities should be promoted." The PPS also encourages "home occupations and home industries."

Appendix D provides more details from the PPS related to rural development within municipalities.

## CITY OF KINGSTON'S OFFICIAL PLAN, 2019

The Official Plan provides some limited guidance as to what kind of economic development should occur in the rural part of the city. These activities include a focus on hamlet development, small scale industrial development, and parameters on activity for prime agricultural areas and for recreation.

### HAMLET-FOCUSED DEVELOPMENT

According to the OP, the areas designated as hamlets “maintain the rural service centre settlement form and are intended to strengthen these communities by enabling limited growth of residential homes, community facilities, and businesses.” These hamlets include Elginburg, Sunnyside, Glenburnie, Kingston Mills, Joyceville, and Brewer’s Mills.

Permitted uses in the hamlets include “one and two-unit residential dwellings, parks and open spaces, limited commercial uses primarily of a local convenience nature or related to the surrounding rural and agricultural community, and community facilities such as schools, places of worship, community centres, libraries or fire halls.” Further, the OP allows “multiple unit residential dwellings and industrial uses” under specific conditions including “appropriate provisions for individual on-site water and sewage services, and setbacks and buffering from adjacent uses.”

Development in hamlets must also be able to accommodate onsite water and sewage services and be in accordance with the Cultural Heritage Resource policies, consent policies, and the OP’s areas of influence policies.

### RURAL COMMERCIAL OR INDUSTRIAL DEVELOPMENT

The OP does allow for “small scale” commercial or industrial uses in rural areas. Any new larger scale commercial or industrial use proposed outside of the Urban Boundary will be subject to an amendment to the OP as a Rural Commercial designation.

### PRIME AGRICULTURAL AREA

Permitted uses in the Prime Agricultural Area designation are limited to agricultural uses, agriculture-related uses, and on-farm diversified uses as defined. All types, sizes, and intensities of agricultural uses and normal farm practices shall be promoted and protected in accordance with provincial standards. Change from one agricultural use to another agricultural use will not require an OP or a zoning by-law amendment.

### RECREATIONAL USES

Through amendment to the zoning by-law, small-scale tourist operations and recreation uses, including equestrian centres, rod and gun clubs, winter sports clubs and facilities, and similar uses (requiring large areas of land, non-intensive servicing, and do not provide overnight accommodation) may be permitted in Rural Lands. If these uses are developed in place of an existing agricultural use or agriculture-related use, then they must be capable of reverting back to its former agriculture use or agriculture-related use if the operation ceases to exist.

**Note:** The restriction of “overnight accommodation” is a barrier to tourism development in Rural Kingston.

# Strategy Framework

Rural Kingston has many assets to guide future economic development. The area has significant tourism potential because of its geography, natural attributes, and history.

A large part of the region is agricultural land, which benefits from trends in local / artisan food, precision agriculture, organic food, and food security. And, the increasing Rural Kingston population may demand more local services.

Potential development opportunities fall under four broad themes: agriculture, hamlet development, tourism, and rural business parks. These opportunities are contingent on three enablers, that will allow the City to

implement recommendations and realize change: project selection and approval process, review of funding envelopes, and identifying and leveraging funding.

Industrial development opportunities are not reviewed in this plan. If future industrial development opportunities arise, land availability for industrial development in the McAdoo’s Lane area of Sunnyside Hamlet, in particular, should be considered.

## STRATEGY COMPONENTS

There are two pillars, seven themes, and 14 recommendations for the rural Kingston Economic Development Strategy.

**Figure 7: Strategy framework**



## SUMMARY OF RECOMMENDATIONS

### 1 Support Agricultural Activities and Businesses

1. Attract New Farmers
2. Encourage Local Food Consumption
3. Foster Innovation in Farming
4. Look for Niche and Value-Added Food Production Opportunities

### 2 Plan Hamlet-led Development Opportunities

5. Develop Hamlet-Based Development Opportunities
6. Encourage Concentrated Residential Development
7. Attract Commercial Residential Development

### 3 Revitalize Tourism Opportunities

8. Animate Tourism Opportunities
9. Encourage Agri-Tourism Initiatives

### 4 Develop Strategic Rural Business Clusters

10. Encourage Industry-Focused Business Park Development
11. Leverage Opportunities that Capitalize on Access to Highway 401



Figure 8: List of recommendations and rationale

Theme	Recommendation(s)	Rationale
Support Agricultural Activities and Businesses	<ol style="list-style-type: none"> <li>1. Attract new farmers</li> <li>2. Encourage local food consumption</li> <li>3. Foster innovation in farming</li> <li>4. Look for niche and value-added food production opportunities</li> </ol>	<ul style="list-style-type: none"> <li>• <b>Existing sector base:</b> There are an estimated 148 farms within the city limits with a minimum of \$30,000 in annual revenue</li> <li>• <b>Alignment with city priorities:</b> The City of Kingston’s Strategic Plan 2019-2022 has specifically focused on the importance of local agriculture</li> <li>• <b>Food security and COVID-19:</b> The COVID-19 pandemic has put particular focus on the importance of local food supplies and resiliency</li> </ul>
Plan Hamlet-led Development Opportunities	<ol style="list-style-type: none"> <li>5. Develop hamlet-based development opportunities</li> <li>6. Encourage concentrated residential development</li> <li>7. Attract commercial business activities to the hamlets, and support current firms</li> </ol>	<ul style="list-style-type: none"> <li>• <b>Alignment with municipal and provincial planning documents:</b> The five existing hamlets satisfy several requirements needed for rural development</li> <li>• <b>Preservation of rural areas:</b> Concentrated development preserves larger rural areas</li> </ul>
Revitalize Tourism Opportunities	<ol style="list-style-type: none"> <li>8. Animate tourism opportunities</li> <li>9. Encourage agri-tourism initiatives</li> </ol>	<ul style="list-style-type: none"> <li>• <b>Attraction of tourists:</b> The City of Kingston is among the top cities for the attraction of tourists each year in Canada</li> <li>• <b>Strategic location:</b> The City of Kingston sits mid-point along the Montréal-Ottawa-Toronto Corridor, where 14.5 million people are within a three-hour drive</li> </ul>
Develop Strategic Rural Business Clusters	<ol style="list-style-type: none"> <li>10. Encourage industry-focused business park development</li> <li>11. Leverage opportunities that capitalize on access to Highway 401</li> </ol>	<ul style="list-style-type: none"> <li>• <b>Alignment with city priorities:</b> The City of Kingston’s Strategic Plan 2019-2022 calls for the exploration of a rural business park or parks</li> <li>• <b>Constraints within Urban Kingston:</b> Limited space in Urban Kingston positions Rural Kingston as an ideal location for park development</li> </ul>
Adopt Project Selection and Approval Process	<ol style="list-style-type: none"> <li>12. Process selection and approval process</li> </ol>	
Review of Funding Envelopes	<ol style="list-style-type: none"> <li>13. Review potential available funding envelopes</li> </ol>	<ul style="list-style-type: none"> <li>• <b>Implementation constraints:</b> To ensure the Rural Kingston area can realize opportunities, restraints within planning guidelines and in funding must be reviewed</li> </ul>
Identifying Alternative Servicing	<ol style="list-style-type: none"> <li>14. Explore alternative servicing options</li> </ol>	

# Pillar One: Development Opportunities

## THEME ONE: SUPPORT AGRICULTURAL ACTIVITIES AND BUSINESSES

### 1 Support Agricultural Activities and Businesses

1. Attract New Farmers
2. Encourage Local Food Consumption
3. Foster Innovation in Farming
4. Look for Niche and Value-Added Food Production Opportunities

### SUMMARY OF RECOMMENDATIONS FOR AGRICULTURE

Agriculture is an important part of the Rural Kingston economy. As discussed previously, there are an estimated 148 farms in the city limits with a minimum of \$30,000 CAD in annual revenue. These farms reflect a wide variety of agricultural activities, from cattle ranching to crop farming. Most of the farms in Kingston are small. Only 29 of the 149 (20 per cent) have formal employment (maintain an employee payroll) and only five have more than 10 employees.

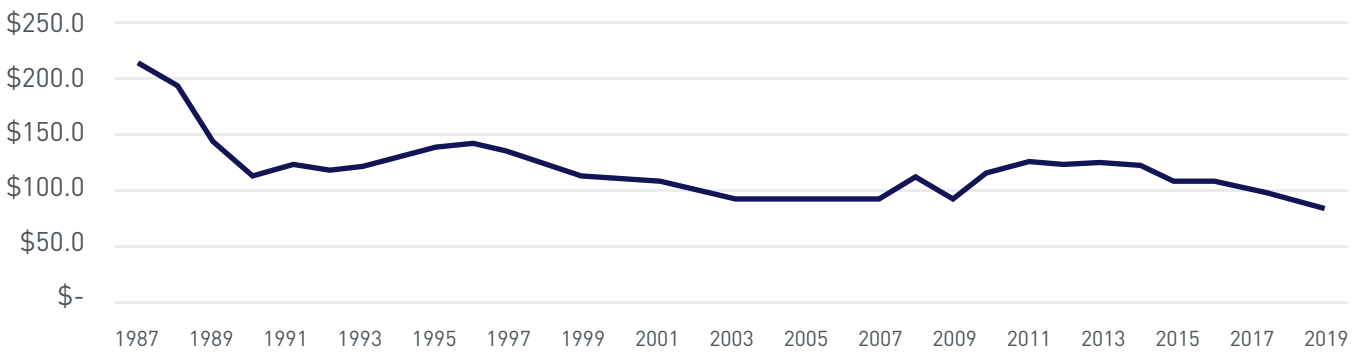
According to the *Census of Agriculture* (2016) conducted by Statistics Canada, the number of farms and the land area being farmed has been in slow decline.<sup>16</sup> In 2007, a study commissioned by the city indicated that the total land in pasture had been in decline for the previous 16 years.

The Conference Board of Canada annually estimates the gross domestic product (GDP) contribution by industry for the Kingston CMA. While it does not specifically provide an estimate for agriculture, the GDP contribution in Kingston from primary industries and utilities has been in decline during the past few years (Figure 9), and peaked in the mid-1980s.

Further, of the more than 150 farms in Kingston identified in the 2016 *Census of Agriculture*, only eight reported having a succession plan. Nearly 60 per cent of all farm operators were more than 55 years of age at the time of the Census.

The decline of agriculture in Rural Kingston is not inevitable; there are several reasons why the outlook is improving. The City of Kingston's Strategic Plan 2019-2022 specifically focused on the importance of local agriculture by having as an objective the promotion of local food security solutions. The objective is to "provide better support to community-led initiatives that support local food production" including to "support and expand on farm-to-table program." The measurables included "supporting farmers markets, community gardens and edible forests."

**Figure 9: Agriculture, other primary sectors and utilities GDP, Kingston CMA, \$million CAD, 2012<sup>18</sup>**



Source: Conference Board of Canada

In the wake of COVID-19, the provincial and federal governments have put an increased focus on the security of the local food supply. Additionally, research and interviews conducted for this report lead to general optimism that there are opportunities to strengthen the Kingston agriculture sector in the future.

**RECOMMENDATION ONE: ATTRACT NEW FARMERS**

**Why this matters:** A focused effort to attract new, younger farmers to Rural Kingston will be important to ensure the long-term viability of the agricultural economy. As discussed previously, most farm operators are aged more than 55. Further, nearly 70 per cent of those who are self-employed in the farming sector were aged more than 55 at the time of the 2016 Census.

Attracting new farmers to the rural area has challenges. Land prices are a considerable barrier to attracting younger, newly trained, or immigrant farmers. According to one expert interviewed for this report, “the value of farmland has become decoupled from the costs of producing food and the prices

associated with it.” New farmer retirees are also moving into more expensive housing closer to the urban core, which in turn pushes up the asking price of agricultural land.

Many young people have expressed an interest in farming but cite accessing needed capital as a major barrier. Additionally, there are limited incentive programs to support young farmers or attract new ones to rural areas. One option explored in other locales is of groups of young farmers creating co-ops to pool their capital and acquire land.

Investment in the growing area of smart agriculture may act as an enticement to new agricultural, mechanical engineering, and computer science graduates.<sup>17</sup> Introducing technology to agricultural operations has the potential to entice a younger and more educated workforce, allowing Rural Kingston the opportunity to retain more recent graduates from Queen’s University and St. Lawrence College.

Figure 10: Potential initiatives to attract new farmers

Potential Initiative	Details
<b>Attract New Farmers</b>	
<b>Review the City of Kingston’s zoning bylaws with a focus on the attraction of new / young / immigrant farmers</b>	<p>Explore options for temporary housing. This strategy allows different rules for on-farm help, giving young farmers apprenticeship opportunities that could also turn into an outright purchase or longer-term arrangement</p> <p>Allow smaller houses / accommodation on farm properties without requirements for severances or zoning changes</p>
<b>Develop a match-making process to bring aspiring young farmers together with farmers approaching retirement</b>	<p>Integrate a transition period where soon-to-retire farmers can mentor the young farmers before and during the transition. Access to capital remains a significant barrier. Examples within Canada that show success in this area include <a href="#">L’Arterre</a> in Quebec who help with the transition of farms including staged acquisitions as well as the development of farm lease agreements with or without an option to purchase</p>
<b>Set up a process to help new farmers develop business plans</b>	<p>Newer farmers are typically educated in how to farm but may lack the necessary business and economic knowledge to sustain their businesses. Depending on the initiative, farmers may need to acquire strategic planning, event management, joint promotion, advertising campaign, and information management skills:</p> <ul style="list-style-type: none"> <li>• Leverage Queen’s University Smith School of Business to provide this training and education to newly established and potential new farmers</li> <li>• Encourage hiring co-op students from the Food and Agricultural Business Co-Op Program at the University of Guelph for special programs and outreach</li> <li>• Embed student projects at local farms from the St. Lawrence College Sustainable Local Food and Tourism Programs</li> </ul>

**RECOMMENDATION TWO: ENCOURAGE LOCAL FOOD CONSUMPTION**

**Why this matters:** Kingston is already an excellent example of the use of local agriculture in the food system. From farmers markets to restaurants and grocery stores, Kingston’s relatively affluent population and awareness of the importance of local food has boosted local consumption. The emergence of COVID-19 is likely to increase interest in the local food supply even further.

A 2016 USDA report discussed the economic impact of local food consumption: “Substituting locally produced commodities for imported items forges stronger regional linkages. In a food import situation, the commodity purchase compensates the grocer, and perhaps a regional distributor, before the bulk of that dollar exits

the local economy to pay the original producers. In contrast ... a local foods purchase might allow a greater number of local supply chain participants to benefit financially from the transaction. Not only are intermediate sellers in the local community (such as a grocer or a farm market vendor) compensated, but a much larger fraction of the purchase price is typically available to compensate a local producer and, possibly, other locally based distributors or processors. In this manner, stronger linkages are forged within the local economy, reducing the volume of consumer food expenditures that leak out of the local economy.”<sup>19</sup> As average food expenditures per household in the Ontario equals \$8,713 (2017) it is of increasing importance that more of these generated revenues remain within Kingston.<sup>20</sup>

Figure 11: Potential initiatives to encourage local food consumption

Potential Initiative	Details
<b>Encourage Local Food Consumption</b>	
<b>Deliberately seek ways to connect producers to local markets</b>	<p>Invest in craft breweries, organic bakeries, CSAs (community supported agriculture) and similar small-scale operations, as they are often eager to build local supply chains into the story of their products</p> <p>Establish a process for chefs to interact with farmers to get exactly the kind of products they want</p> <p>Work with Second Harvest to expand supply chain</p>
<b>Support farmers markets and onsite farm stores</b>	Offer farm tour festivals / open houses to encourage urban dwellers to visit their local farms and farm stores
<b>Implement an ongoing campaign to encourage local food consumption</b>	Mobilize a campaign, similar to the Love Kingston campaign
<b>Support initiatives focused on addressing food security</b>	<p>Partner with schools / PSE to ensure a “no student goes hungry” policy with support from local organizations and famers</p> <p>Investigate a wide range of diverse foodstuffs to support the culinary differences of cultures within Kingston</p> <p>Develop a city-wide food security policy</p>

**RECOMMENDATION THREE: FOSTER INNOVATION IN FARMING**

**Why this matters:** Kingston is one of the most research-intensive Canadian urban centres. In 2019, Queen’s University alone secured \$190 million in sponsored research. The city has the highest concentration of post-secondary teaching and research assistants among urban centres across the country. Little of this research horsepower is focused on agriculture but moving forward increasing the focus on innovation could be a source of new economic activity, strengthen the farming sector, and expand the city’s role as an R&D hub for Canada. One of the challenges in Kingston is the large number of smaller farms with limited capacity for innovation.

Focus should align with trends in precision agriculture and smart agriculture. Agri-tech

research has emphasized the growing rate of adoption for innovative technologies in agricultural production. These smart technologies can be widely applied across farming application including large-scale commercial farms, small, independent farms, and at-home, family farms, making them attractive to Kingston farmers.

Innovation in farming is also a large policy issue for the federal government. With a vision of being one of the top five competitors in the agri-food sector by 2025, Canada is targeting \$140 billion CAD in domestic sales and \$85 billion CAD in exports by 2025. A wide variety of funding supports are available in this area to expand agriculture and agri-tech’s international profile, where it be for export of food commodities, processed foods, or agri-tech supports.

Figure 12: Potential initiatives to foster innovation in farming

Potential Initiative	Details
<b>Foster Innovation in Farming</b>	
<b>Support for Businesses</b>	<p>Investigate, support, and champion local businesses in their export journeys</p> <p>Create a city-based e-commerce site to expedite sales of local foods across Canada (within regulations)</p>
<b>Develop and Expand Partnerships</b>	<p>Develop partnerships with other local farm communities (e.g., Prince Edward County, Upstate New York) for research collaborations and partnerships</p> <p>Enable farming partnerships with new precision agriculture companies and PSE researchers to act as pilot locations for new research</p> <p>Leverage new Smart Farm facilities at Invest Ottawa for joint initiatives</p>
<b>Expand Broadband Connectivity</b>	<p>Create a broadband plan to expedite improved access for rural communities.</p> <p>Note: As of November 9, 2020, the federal government has allocated \$1.75 billion CAD for the universal broadband fund to connect 98 per cent of Canadians to high-speed by 2026</p>

**RECOMMENDATION FOUR: LOOK FOR NICHE AND VALUE-ADDED FOOD PRODUCTION OPPORTUNITIES**

**Why this matters:** The province of Ontario has seen rapid growth in specialized agricultural products in recent years. This includes niche meats, cheeses and crops, bee production, etc. as well as innovative ways to prepare, package, and distribute foods. The proposed innovation forum could also be a venue for assessing new value-added food production opportunities.

As discussed in the “Industry and Commercial Summary: Rural Kingston” section, the bulk of Kingston’s agricultural sector are small farms, with no registered employees. These farms are in an ideal position to tap into trending niche markets, as many current niche food production opportunities offer relatively small start-up

costs in comparison to other farming activities. Encouraging Kingston’s smaller scale farms to align with the growing trends in food production markets may allow them to realize greater growth.

Value-added food production should also be considered, as it could leverage and revitalize existing farming operations in Rural Kingston, allowing farmers to reach new customers and markets and increase profitability. Additionally, it is aligned with provincial priorities, as using rural infrastructure and public services efficiently and promoting diversification of the economic base through value-added products is stated as a priority in the Provincial Policy Statement.

Figure 13: Potential initiatives for niche and value-added food production opportunities

Potential Initiative	Details
<b>Look for niche and value-added food production opportunities</b>	
<b>Support Local Food Procurement</b>	<p>Develop a local food procurement policy to support local and regional farmers and farm businesses</p> <p>Hire or designate a current staff member as a Local Food Entrepreneur in Residence</p> <p>Coordinator that is responsible for promoting local food campaigns and events</p>
<b>Deliberately seek ways to connect producers to local markets</b>	<p>Invest in craft breweries, organic bakeries, CSAs (community supported agriculture) and similar small-scale operations, as they are often eager to build local supply chains into the story of their products</p> <p>Establish a process for chefs to interact with farmers to get exactly the kind of products they want</p> <p>Work with Second Harvest to expand supply chain</p>
<b>Create a database to connect local farmers with Federal and Provincial Incentive Programs</b>	<p>Compile and create a comprehensive list / database of available federal and provincial funding for value-added and niche farming opportunities</p>



## THEME TWO: PLAN HAMLET-LED DEVELOPMENT OPPORTUNITIES

### SUMMARY OF RECOMMENDATIONS FOR HAMLET-LED DEVELOPMENT

#### 2 Plan Hamlet-led Development Opportunities

5. Develop Hamlet-Based Development Opportunities
6. Encourage Concentrated Residential Development
7. Attract Commercial Residential Development

#### RECOMMENDATION FIVE: HAMLET OPPORTUNITIES DEVELOPMENT

**Why this matters:** Opportunities to develop Rural Kingston’s hamlets fall into two categories: residential development and commercial services development. The other rural development opportunities outlined in this report also apply to the hamlets (i.e., farming, tourism, and business parks).

Rural Kingston is spread across a large area of more than 370 square kilometers. In the rural area, there exist six identified hamlets or nodes of residential and / or local commercial activity. Focusing residential and commercial activity in these hamlets provides several benefits:

- Through centralization, it reduces the cost of public services as well as infrastructure such as broadband telecommunications.
- Through resource optimization, it identifies and protects rural resources, such as areas with wind energy potential, aquifers, or water sources.

- Through recognition, it highlights the strategic roles Rural Kingston in terms of recreation, heritage conservation, natural resources, and food production.
- Through concentration, it provides enough population to make it attractive for entrepreneurs to provide services. The hamlet approach is also being taken in other cities across Canada with large rural areas (e.g., Ottawa, Halifax).

There are six identified hamlets in Rural Kingston: Elginburg, Joyceville, Glenburnie, Kingston Mills, Sunnyside, and Brewer’s Mills. Brewer’s Mills is mostly an agricultural area with little housing and commercial activity. Sunnyside is primarily an industrial zone with more businesses and a limited local residential population. Previous attempts to increase residential development in the Sunnyside hamlet to date have been uncoordinated and unsuccessful.

Any future proposed commercial, residential, or industrial development requires an existing population base. For the purposes of our analysis and forthcoming recommendations, the hamlets with a population under 1,000 people, Sunnyside and Brewer’s Mills, were excluded.

Figure 14: Selected Rural Kingston hamlets, summary profiles, 2020<sup>21</sup>

	Elginburg	Joyceville	Glenburnie	Kingston Mills
Population	630	432	1,174	1,271
Households	202	167	475	507
Share of population 55+	43%	40%	45%	45%
Average household income	\$128,503	\$100,081	\$128,381	\$96,055
Est. total annual household spending*	\$19,215,561	\$12,372,474	\$45,142,208	\$36,050,921
Est. annual household spending per household	\$95,127	\$74,087	\$95,036	\$71,106
Industry / commercial profile	<ul style="list-style-type: none"> <li>• Farming</li> <li>• Construction</li> <li>• A few retail, professional and personal service firms</li> </ul>	<ul style="list-style-type: none"> <li>• Farming</li> <li>• Corrections Canada facility</li> </ul>	<ul style="list-style-type: none"> <li>• Farming</li> <li>• Construction</li> <li>• Six retail trade firms, two manufacturers five personal service firms</li> </ul>	<ul style="list-style-type: none"> <li>• Farming</li> <li>• Limited other commercial activity</li> </ul>

Sources: City of Kingston, Environics, Statistics Canada, 2020

**RECOMMENDATION SIX: ENCOURAGE AND REDIRECT RESIDENTIAL DEVELOPMENT**

**Why this matters:** As discussed earlier in this report, Ontario’s CMAs and CAs recently have witnessed faster growth in their rural populations than in urban areas. This growth is also likely the case in Kingston, though the 2021 *Census of Population* will provide a more up to date assessment of population and workforce growth.

Despite the view that Kingston should only focus population growth in the urban core and periphery, there are several benefits to encouraging at least modest population growth in Rural Kingston hamlets. Encouraging population growth in the hamlets will:

- Create more demand for local services.
- Create the demand for new housing and housing options (e.g., seniors and other affordable housing).
- Help support the case for investment in public services and infrastructure.
- Rebalance the demographic profile of Rural Kingston to ensure sustainability of the local workforce, and attract talent / retain student populations.
- Include Rural Kingston in future talent and business attraction promotions.
- Bring more entrepreneurs to Rural Kingston.
- Bring more of the city’s newcomers / immigrants to Rural Kingston.

**RECOMMENDATION SEVEN: ENCOURAGE COMMERCIAL BUSINESS ACTIVITY IN THE HAMLETS**

**Implied Demand for Services (Household Spending Basis)**

One way to determine which industries could be attracted to the various Rural Kingston hamlets is to assess the total market size for services in the hamlets. This market size can be estimated using total household spending in the hamlet and average household spending on goods and services (from Statistics Canada’s annual household expenditures survey). This survey is based on spending across Ontario and, as such, should be used carefully. For use as a first-level estimate of the demand for services, however, it is a powerful tool.

Figure 15 shows the implied demand for various services in the four Rural Kingston hamlets based on household spending. Current consumption is the share of total household income that is used to support household needs during the year. This amounts to about 74 per cent of total household income across Ontario. The other 26 per cent is spent in non-current consumption areas such as taxes and savings.

Assuming Glenburnie residents spend a typical amount on food, they spend around \$5.9 million per year, of which \$2 million goes to food purchased from restaurants. The rest would be spent on groceries and other food categories. Glenburnie residents would also be spending \$3.3 million on household operations, including \$1.7 million on communications (e.g., telephone, Internet services). Additionally, they would spend an average \$1.4 million on gasoline and other fuels, and \$1.1 million on vehicle maintenance and repair. Glenburnie residents would spend each year \$2.4 million on health and personal care expenses, including nearly \$400,000 on personal care services (e.g., haircuts, salon services).

The spending for each of the four hamlets is summarized in Figure 15. Right now, residents of these hamlets must access many of these services elsewhere in Kingston.

**Figure 15: Implied demand for services, household spending categories, Rural Kingston hamlets \$CAD, 2017<sup>22</sup>**

	Elginburg	Joyceville	Glenburnie	Kingston Mills
<b>Total current consumption</b>	<b>19,216,000</b>	<b>12,372,000</b>	<b>45,142,000</b>	<b>36,051,000</b>
Food expenditures	2,504,000	1,612,000	5,883,000	4,698,000
Food purchased from restaurants	848,000	546,000	1,992,000	1,591,000
Shelter	5,980,000	3,850,000	14,049,000	11,219,000
Household operations	1,415,000	911,000	3,325,000	2,655,000
Communications	710,000	457,000	1,668,000	1,332,000
Pet expenses	196,000	126,000	461,000	368,000
Household furnishings and equipment	734,000	472,000	1,724,000	1,377,000
Clothing and accessories	1,069,000	689,000	2,513,000	2,007,000
Transportation	3,766,000	2,425,000	8,848,000	7,066,000
Vehicle maintenance / repairs (incl. parts)	466,000	300,000	1,095,000	874,000
Gas and other fuels	615,000	396,000	1,444,000	1,153,000
Health and personal care	1,016,000	654,000	2,388,000	1,907,000
Personal care services	169,000	109,000	396,000	317,000
Recreation	1,135,000	731,000	2,667,000	2,130,000

Source: Derived using Statistics Canada Table: 11-10-0222-01

**Implied Demand for Services  
(Household Population-Based Analysis)**

Another way to assess the potential demand for services in the hamlets is to look at the number of businesses by industry per 1,000 population across the city. This analysis is based on all businesses with \$30,000 or more in annual revenue (employer and non-employer) using Statistics Canada business count data (June 2020). For example, there are six doctors’ offices and three restaurants in Kingston for every 1,000 residents.

This high-level analysis provides another tool to understand potential commercial development opportunities in the hamlets. Using this approach, there is likely enough demand in Glenburnie for a small cluster of retail firms, three restaurants, seven doctors’ offices, four other health care providers, 10 professional services providers, three

personal services providers and a number of financial planning and real estate services providers.

One of the challenges is that there may not be enough demand for an actual physical location with staff in the hamlet. For example, there isn’t quite enough demand (using this approach) for a grocery store in Glenburnie but there would be enough demand for a combined grocery store / café / gasoline station. The same applies to health care services. In Glenburnie there is enough demand for at least one dentist’s office but also at least some demand for other health care services (e.g., physiotherapy, optometry). Providers of these services could provide services in the hamlets on a periodic basis – one or two days per week, for example, providing them with a captive market.

**Figure 16: Potential local service opportunity, by hamlet**

Hamlet	Potential local service opportunities (population size is large enough to potentially justify these options)	
Glenburnie	<ul style="list-style-type: none"> <li>• 8 retail stores</li> <li>• 3 restaurants</li> <li>• 7 doctors’ offices</li> <li>• 4 other health care providers</li> </ul>	<ul style="list-style-type: none"> <li>• 10 professional services providers (e.g., lawyer)</li> <li>• 3 personal services providers (e.g., hairdressers)</li> <li>• Financial planning and real estate services</li> </ul>
Elginburg	<ul style="list-style-type: none"> <li>• 4 retail stores</li> <li>• 2 restaurants</li> <li>• 4 doctors’ offices</li> <li>• 2 other health care providers</li> </ul>	<ul style="list-style-type: none"> <li>• 6 professional services providers (e.g., lawyer)</li> <li>• Financial planning and real estate services</li> </ul>
Joyceville	<ul style="list-style-type: none"> <li>• 3 retail stores</li> <li>• One restaurant</li> </ul>	<ul style="list-style-type: none"> <li>• 3 doctors’ offices</li> <li>• Financial planning and real estate services</li> </ul>
Kingston Mills	<ul style="list-style-type: none"> <li>• 9 retail stores</li> <li>• 3 restaurants</li> <li>• 7 doctors’ offices</li> <li>• 5 other health care providers</li> </ul>	<ul style="list-style-type: none"> <li>• 11 professional services providers (e.g., lawyer)</li> <li>• 3 personal services providers (e.g., hairdressers)</li> <li>• Financial planning and real estate services</li> </ul>

**Figure 17: Potential initiatives to support hamlet development (for all of Theme Two)**

Potential Initiative	Details
<b>Hamlet Development: Commercial / Residential Nodes (Theme Two)</b>	
<b>Healthcare to Support Hamlet Development</b>	<p>Encourage more home care services in the hamlets</p> <p>Develop the concept of a rural health care centre in one or more hamlets</p>
<b>Evaluate Commercial Opportunities</b>	<p>Establish a process for commercial opportunities development in the hamlets. This process should include a more thorough analysis of demand, an identification of potential service providers and the promotion of opportunities to potential service providers.</p>
<b>Rural Settlement Strategy</b>	<p>Develop a formalized rural settlement strategy for Rural Kingston. Encourage the residential housing development sector to consider hamlet-based housing development</p> <p>Explore the potential for senior housing options that would allow older residents to continue to live in their communities and encourage city dwellers to move to the countryside. Second homes / vacation homes should also be included for part-time residents</p> <p>Expose newcomers / immigrant to residential and commercial opportunities in the hamlets, including farming and agri-tourism</p>
<b>Infrastructure Assessment and Investment</b>	<p>Invest in rural broadband connectivity in the hamlets</p> <p>Evaluate the potential demand for transportation / ride sharing services between the hamlets and Urban Kingston</p>

## THEME THREE: REVITALIZE TOURISM OPPORTUNITIES

### SUMMARY OF RECOMMENDATIONS FOR TOURISM OPPORTUNITY DEVELOPMENT

#### 3 Revitalize Tourism Opportunities

- 8. Animate Tourism Opportunities
- 9. Encourage Agri-Tourism Initiatives

Adjusted for population size, the City of Kingston is among the top Canadian cities for the attraction of tourists each year. Its strategic location at the mid-point of the Montréal-Ottawa-Toronto corridor means 14.5 million people are within a three-hour drive. It has numerous natural and man-made tourism assets. Within the rural area,

there are several municipal and federal forests and parks, and a large regional conservation area.

Despite this beneficial location, data from Statistics Canada in 2017 indicated the average tourist spends less money per visit in Kingston than the median Census Metropolitan Area in Canada.<sup>23</sup> Many CMAs including Brantford, Guelph, Hamilton, Kitchener, and others attract a large share of their annual visitors on day trips. These locations have a lower average visitor spending amount because there are fewer overnight stays.

By contrast, more than 50 per cent of all visitors to Kingston in 2017 stayed at least one night. As shown in Figure 18, among CMAs across Canada where at least 40 per cent of the visits included an overnight stay(s), Kingston ranked 12th out of 14 CMAs for average visitor expenditure.

Rural Kingston can be an important asset to boost tourist spending by providing additional opportunities aligned with the tourism activities in the urban core.

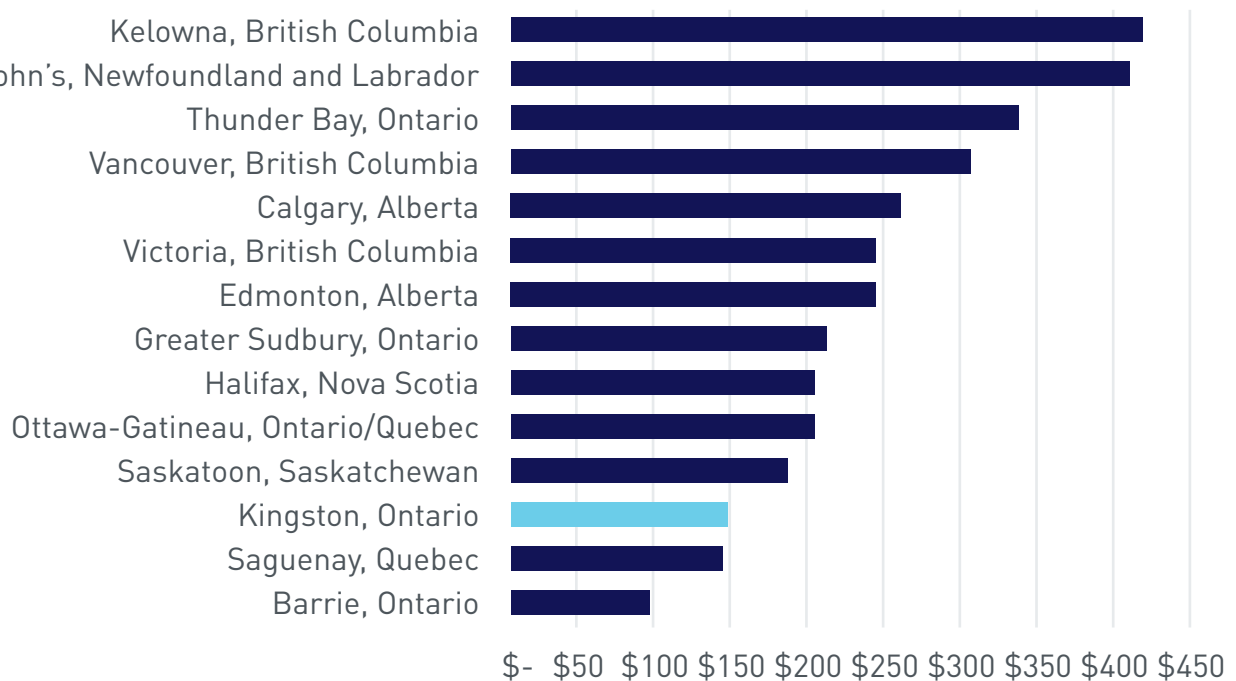
Discussions with Tourism Kingston and other stakeholders, as well as research into other jurisdictions, reveal several potential tourism investment opportunities for Rural Kingston that have potential.

**RECOMMENDATION EIGHT: ANIMATE TOURISM OPPORTUNITIES**

**Why this matters:** Some of these opportunities are at various stages of development. Others are only ideas. To fully develop the potential of tourism investment in Rural Kingston, a process needs to be developed that helps illustrate the value proposition / business case for the opportunities, and engages local farmers, landowners, and entrepreneurs to collaborate, assess interest, and investment potential. These Rural Kingston tourism opportunities need to be integrated into the broader tourism marketing campaign (see Potential Initiatives Table for further details).

Note: there are some challenges associated with development accommodations on agricultural land. Additional stakeholder outreach and consultations will be required in advance of proceeding with this recommendation.

**Figure 18: Average visitor expenditure per visit, selected CMAs, \$CAD, 2017<sup>24</sup>**



*\*Canadian visitors only. Source: Statistics Canada Table: 24-10-0030-01*

**RECOMMENDATION NINE: ENCOURAGE AGRI-TOURISM INITIATIVES**

**Why this matters:** Agri-tourism provides a number of benefits to the community. First, it generates new economic opportunities, particularly for smaller scale farms such as is the norm in Rural Kingston. This additional income stream can help bolster farm revenues and strengthen the value proposition for future investment in the farming sector. It also allows for a more balanced cash flow year-round.

Second, agri-tourism connects the urban population more directly to the rural economy. Agritourism by its very nature fosters farmer-customer partnerships. Urban residents are exposed to the farming sector and its importance to the local economy and society. This exposure aids with the development of the agricultural workforce, promotes sustainability and food security, and attracts new farmers. Third, agri-tourism can help draw in tourists from areas outside of Kingston and help grow the local economy.

**Figure 19: Potential initiatives to support tourism opportunity development (for all of Theme Three)**

Recommendation	Potential Initiatives
<b>Tourism Opportunity Development (Theme Three)</b>	
<b>Explore Tourism Accommodation Expansion</b>	Farm-based accommodation / agritourism / dude ranch experiences; bed and breakfasts; small hotels / inns; high-end glamping resort / sky beds; winter camping
<b>Expand Agri-tourism Opportunities</b>	Sugar shacks at one of the Rural Kingston’s maple syrup farms; U-pick opportunities (e.g., apples); corn mazes and other interactive tourism (e.g., Wynn Farm); farm tours; embedded stands at large employment locations (e.g., hospitals, PSE); animal observation; overnight stays at farms (farmstays); cooking / hand crafting workshops; wool and textile festivals
<b>Increase Access to Adventures and Tourism Experiences</b>	Horseback riding excursions on the K&P trail; bird watching tours; fishing charters; backwoods hiking / geocaching; mushroom foraging; fitness and parkour trails; mountain bike / electric bike rentals; winter tourism included guided tours (e.g., snowshoeing / cross-country skiing; skating). Others include tree top adventures, <a href="#">workaway</a> on farms and local homestead tours. There is currently no <a href="#">dark sky designated area</a> between Pelee Island and Montréal for astronomy or sky watching which of necessity requires a rural location
<b>Encourage more use of smart technologies in the agriculture sector</b>	<p>Agri-tech research has emphasized the growing rate of adoption for innovative technologies in agricultural production. Of note is the implementation of connected technologies and smart solutions</p> <p>There are multiple factors driving advancements for the increasing use of connected and smart technology for agriculture</p> <p>Farmers are an aging population, with more than one quarter of farmers in Canada reaching 65 years of age or older by 2025</p>

**Figure 19: Potential initiatives to support tourism opportunity development (for all of Theme Three)(con't)**

Recommendation	Potential Initiatives
<b>Encourage more use of smart technologies in the agriculture sector (con't)</b>	<p>Local, provincial, and national governments have committed to reducing greenhouse gas emissions, and Industrial Internet of Things (IIoT) solutions can play a significant role in creating more sustainable farming opportunities</p> <p>Smart technologies can be widely applied across farming applications including large-scale commercial farms, small, independent farms, and at-home, family farms</p> <p>Locally, support companies such as Croptracker, a cloud-based crop monitoring system designed to give fruit and vegetable growers real-time updates, developed by Kingston-based software company Dragonfly IT</p>
<b>Establish an innovation forum</b>	The goal of the forum is to bring together small farmers, academics, researchers, chefs and other specialists to brainstorm ways to foster innovation in agri-tourism
<b>Establish a cluster for smart technology research, development, and commercialization</b>	Consider and support innovative technology (e.g., vertical farming, aquaponics, hydroponics). The recent announcement of a vertical farming facility at Local Leaf Farms <sup>25</sup> is a good example of this approach <sup>26</sup>
<b>Attract more investment into innovative agriculture</b>	Work in partnership with existing organizations (such as Invest Ottawa, Queen’s Innovation and Partnerships Office) to leverage and attract more investment into innovative agriculture

## THEME FOUR: DEVELOP STRATEGIC RURAL BUSINESS CLUSTERS

### SUMMARY OF RECOMMENDATIONS FOR RURAL BUSINESS CLUSTER DEVELOPMENT

#### 4 Develop Strategic Rural Business Clusters

- 10. Encourage Industry-Focused Business Park Development
- 11. Leverage Opportunities that Capitalize on Access to Highway 401

The City of Kingston’s Strategic Plan 2019-2022 included the exploration of a rural business park or parks. There are growing constraints on the ability to construct commercial buildings in the urban core; Rural Kingston may be a viable alternative for some of this activity.

In general, there is considerable land available that could be converted to business parks and developed into rural business clusters in Rural Kingston, but much of it would require rezoning agricultural land. Further, the provision of private water services has been challenging for past industrial development proposals due to a lack of available groundwater resources, and available land is almost entirely privately owned.

Rural business cluster development, therefore, is best positioned alongside hamlet development. This positioning leverages the less restrictive provisioning policies of Rural Kingston’s hamlets, and allows the clusters to benefit from proximity to clustered residential development. Appendix E shows some of the potential areas for rural business cluster development in or adjacent to the hamlets.

One potential option is the development of a construction industry focused cluster development in Rural Kingston. This option would allow the industry to co-locate in a zone tailored to the needs of the industry and support better collaboration. It would also support the attraction of other needed construction-related services to the area. Rural Kingston is already home to a relatively large share of the city’s construction industry, but it is spread out across the region.

Another option involves the creation of a cluster development (s) near Highway 401. There does appear to be available land that could be assembled / converted into a business park or to allow cluster development.

A consideration for the cluster development is a focus on smart construction. Globally, smart construction is a \$49.28 billion USD

industry (2019) dealing with advances in applying sensors, microchips, and actuators to control and regulate HVAC, ventilation, lighting, and other systems. Precedence Research recently estimated that the global smart building market forecast to reach \$127.09 billion USD by 2027, with a CAGR of 12.5 per cent (2020-27).<sup>27</sup> The North American market is dominating global demand, and a focus on smart construction would be an ideal opportunity for domestic sales and international export.

“Any business cluster development (or business park) in or adjacent to one of rural Kingston’s hamlets could be the venue for new local service-focused commercial activity, potentially value-added agriculture or food production facilities.”

**Figure 20: Potential initiatives to support rural business park development**

Recommendation	Potential Initiatives
<b>Develop Strategic Rural Business Clusters</b>	
<b>Encourage industry-focused business park development</b>	<ul style="list-style-type: none"> <li>Explore the opportunity to consolidate the rural construction industry into a centralized park</li> <li>Explore office complex development to include professional, scientific, and technical businesses along with co-working spaces</li> <li>Explore value-added agricultural and food production opportunities</li> <li>Explore the development of a warehousing centre for value-added food production</li> <li>Explore the development of a distribution centre for value-added food production and distribution</li> </ul>
<b>Leverage Opportunities that Capitalize on 401 Access</b>	<ul style="list-style-type: none"> <li>Explore foreign direct investment opportunities that capitalize on access to Highway 401. Includes: distribution, warehousing, transportation, logistics, and manufacturing</li> </ul>

## **STRATEGIC BUSINESS CLUSTER DEVELOPMENT CRITERIA**

Development criteria for this analysis has been created after consultation with key stakeholders and with consideration of Kingston's Official Plan and the Provincial Planning Statement. The criteria is as follow:

1. Within 6km from a city-defined Hamlet (Sunnyside, Elginburg, Glenburnie, Kingston Mill's, Joyceville, Brewer's Mill)
2. Above 50 acres in continuous area
3. Within seven kilometres from Kingston's Highway 401
4. Current Use: Vacant Land, Farmland, Commercial, Residential
5. Access to key services

## **SNAPSHOT OF POTENTIAL SITES FOR STRATEGIC RURAL BUSINESS CLUSTER DEVELOPMENT (BASED ON CRITERIA)**

More than 200 sites with 50 or more acres in continuous land were found and analyzed within Rural Kingston. Based on the above criteria, five sites were identified as having the most potential as a site for a rural business park.

The identified properties are all within, or in close proximity to, the four Rural Kingston hamlets that have been deemed suitable for development. Each have modest operations and are classified as either vacant land or farm property. The properties selected have sufficient land, zoning, and ownership potential to be considered for possible business park sites in the future.

## **CONSIDERATIONS FOR STRATEGIC RURAL BUSINESS CLUSTER DEVELOPMENT**

Given the City of Kingston has existing sites for cluster development (including St. Lawrence Business Park, Cataraqui Estate Business Park, Airport Lands, etc.), the opportunity for the development of business clusters in Rural Kingston is anticipated to be a long-term horizon (five to 10 years) opportunity.

Before the development of business clusters can be realized, consideration should be given to the status of the existing cluster development sites listed above. Until completion of the above projects, Rural business cluster development is not recommended.

Consideration should also be given to the obstacles faced by these upcoming developments, and whether they provide insight or opportunity to the development of rural clusters. Potential to extend the urban boundary to include lands directly above Kingston's Highway 401, detailed in the Provincial Policy Statement, may serve to reduce servicing and zoning provision issues.

# Pillar Two: Enablers

Pillar Two covers the last of the seven themes; these themes act as key enablers for the entire strategy: 5) Process Improvement, 6) Funding Assessment, and 7) Servicing Assessment.

## THEME FIVE: PROCESS IMPROVEMENT

### SUMMARY OF RECOMMENDATIONS FOR PROCESS IMPROVEMENT

**Why this matters:** Rural Kingston zoning is preset and assessed on a case-by-case basis through a Zoning By-Law amendment (for smaller scale uses) and an OP amendment (for larger scale uses). Any future development of rural Kingston land is contingent on the approvals needed to properly zone strategic development areas.

Currently, there exists gaps between Provincial Policy Statement and local Official Plan / Zoning Bylaws. Such vagueness makes business development and / or attraction difficult.

**Figure 21: Potential initiatives for project selection and approval process**

Recommendation	Potential Initiatives
<b>Adopt Project Selection and Approval Process</b>	
<b>Assess Current Hamlet Zoning</b>	Investigate current available development land. Based on analysis, propose rezoning of relevant land that will enable development opportunities
<b>Revise Planning Processes and Documentation</b>	Include context and education around current Provincial Policy Statement development strategy
<b>Adopt Development Selection Scorecard for Future Development Opportunities</b>	This scorecard will help to streamline approval process from end-to-end and create better alignment between stakeholders

## THEME SIX: FUNDING ASSESSMENT

### SUMMARY OF RECOMMENDATIONS FOR FUNDING ASSESSMENT

**Why this matters:** Accessing funding will be important for a variety of identified development opportunities. A number of provincial and federal programs are available to assist the municipality in expanding

broadband connectivity, augmenting servicing in the identified hamlet and commercial development zones, and supporting businesses with SEED funding and other funding that may be required to grow and scale their businesses.

**Figure 22: Potential initiatives for reviewing potential funding envelopes**

Recommendation	Potential Initiatives
<b>Review Potential Funding Envelopes</b>	
<b>Leverage Federal and Provincial Broadband Funding</b>	<ol style="list-style-type: none"> <li>1. Government of Canada’s CRTC Broadband Fund / Universal Broadband Fund</li> <li>2. Government of Canada’s Connect to Innovate Program</li> <li>3. Up to Speed: Ontario’s Broadband and Cellular Action Plan</li> <li>4. Canada’s Centre of Excellence in Next Generation Networks</li> <li>5. Eastern Ontario Regional Network</li> </ol>
<b>Leverage Federal and Provincial Agriculture Funding</b>	<ol style="list-style-type: none"> <li>1. Government of Canada’s AgriInnovate Program</li> <li>2. Government of Canada’s Agriculture Clean Technology Program</li> <li>3. CanExport for SMEs</li> <li>4. Canadian Agriculture Partnership (Ontario Stream)</li> <li>5. Eastern Ontario Development Fund</li> <li>6. Eastern Ontario Rural Innovation Initiative</li> </ol>

## THEME SEVEN: SERVICING ASSESSMENT

### SUMMARY OF RECOMMENDATIONS FOR SERVICING ASSESSMENT

**Why this matters:** The Provincial Policy Statement expresses a clear preference for municipal water and sewer services for settlement areas. It notes that, when settlement areas have municipal sewage services and municipal water services, “intensification and redevelopment shall be promoted wherever feasible to optimize the use of the services” (PPS 1.6.6.2).

It is likely that alternative servicing options will be required in Rural Kingston since:

a) very little of this area is served by municipal water and wastewater services, and,

b) the business case to extend services across Highway 401 is very challenging.

The Statement also notes, however, where there is no such service available, planned or feasible, “private communal sewage services and private communal water services are the preferred form of servicing for multi-unit / lot development to support protection of the environment and minimize potential risks to human health and safety.” (PPS, 1.6.6.3)

Where neither of these options are available, planned, or feasible, “individual on-site sewage services and individual on-site water services

may be used provided that the conditions are suitable for the long-term provision of such services with no negative impacts.” (PPS 1.6.6.4) In settlement areas, “individual on-site sewage services and individual on-site water services may be used for infilling and minor rounding out of existing development, green infrastructure, including private communal sewage services.” (PPS 1.6.6.4)

A section in the PPS notes that subject to the hierarchy of preferences described, “planning authorities may allow lot creation only if there is confirmation of sufficient reserve sewage system capacity and reserve water system capacity within municipal water services and municipal water services or private communal sewage services and private communal water services.” (PPS. 1.6.6.6)

**Figure 23: Potential initiatives for exploring alternative servicing options**

Recommendation	Potential Initiatives
<b>Explore Alternative Servicing Options</b>	
<b>Review Best Practices and Trends</b>	The most conventional best practices include: <ul style="list-style-type: none"> <li>• Lot-level on-site systems (typically a well and septic system)</li> <li>• Central systems (community-scale collection and distribution systems, typically owned by the municipality)</li> </ul>
<b>Explore Innovative Options</b>	<ul style="list-style-type: none"> <li>• Advanced Treatment Units and Package Treatment Plants (e.g., smaller scale mechanical and chemical treatment processes that can be added to a conventional septic system; bubblers; new membrane filters)</li> <li>• In-Unit Wastewater Separation (i.e., new toilet designs that separate solids and liquids within the toilet; composting toilets)</li> <li>• Waterless toilets (i.e., each use is “packaged” in a sealable envelope for later disposal)</li> <li>• Ozone for Small Systems Water Treatment (i.e., disinfecting water at point of entry to a distributed network of devices, using ozone rather than chlorine)</li> <li>• In-Building Treatment Systems (i.e., private system placed inside a building; may be connected to water use-reuse systems)</li> <li>• Municipal Service Provision (i.e., municipality offers services such as septage haulage from holding tanks or communal service)</li> <li>• Effluent dispersal over a large area of public and / or private lands</li> </ul>

“Experience and observation indicates that small villages without water and wastewater services or those blessed by proximity to a growth pole or amenity, are static or are in a process of decline. Across Ontario, exceptions would primarily be serviced villages or villages with specific and unique local attributes that are driving success.”

A Fresh Look: Alternative Servicing Models for Ontario’s Villages, February 2019

# For Consideration

Several recommended initiatives in the Rural Kingston Economic Strategy are contingent upon provincial planning standards (e.g., Ontario's Provincial Planning Statement) and municipal planning documents (e.g., Kingston's Official Plan).

Relevant components of these documents have been reviewed and considered in the formulation of this strategy (pgs. X-X). Several recommendations with medium- and long-term timelines, however, have been formulated with future amendments to the Official Planning documents in mind. For these recommendations to be successful, it is important for the City of Kingston and other leads to reflect upon these potential amendments during the implementation phase of the Rural Kingston Economic Strategy.

Most notably, Kingston's Official Plan document is set to be revised and renewed in 2023-24. The following points summarize areas for consideration as project leads move towards implementing the strategy's recommended initiatives:

1. **Encourage Hamlet-led Development:** At the renewal of the Official Plan in 2023-24, consider inclusions / revisions to allow for modest residential and commercial development in and directly surrounding the six identified Official Plan hamlets. Creating mixed-use zoning within the identified hamlets will enable the creation of development nodes that can be connected by transit services to the urban areas of the city.
2. **Review Tourism Restrictions:** At the renewal of the Official Plan in 2023-24, consider inclusions / revisions required to allow for overnight tourist accommodation in Rural and Urban Kingston. In the short term, enabling overnight accommodation will allow Rural Kingston businesses to capture locals looking for staycation options due to the COVID-19 pandemic.
3. **Enable Alternate Servicing Options:** At the renewal of the Official Plan in 2023-24, consider inclusions / revisions for alternate servicing methods in the Rural Kingston area.
4. **Consider Rural Kingston's Unique Resources and Attributes:** At the renewal of the Official Plan in 2023-24, review natural resources policies to reflect the different role(s) these resources play in rural areas; in urban settings, these are amenities whereas in rural areas, they are sometimes the basis for a business.

- 5. Review Default Rural Land Use Designations:** At the renewal of the Official Plan in 2023-24, consider reviewing default rural land use designations. Under the current Official Plan, all prospective development must go through a rezoning process. Consider reviewing the default rural land designations to avoid the current rezoning obligation.
- 6. Review and Define “Prime Agricultural Land”:** At the renewal of the Official Plan in 2023-24, review the definition of “prime agricultural land” and consider implementing gradations within the zoning of agricultural land. Gradations in zoning will allow prime agricultural land to be protected and enable further development on agricultural land that is not essential.
- 7. Review Timing of Rezoning Processes:** At the renewal of the Official Plan in 2023-24, consider reviewing and revising the sequence of approval for rezoning to allow prospective new businesses looking to settle in Rural Kingston to be pre-approved for their desired zoning.
- 8. Align Encouraged Land Uses with the Kingston Integrated Economic Development Strategy:** At the renewal of the Official Plan in 2023-24, consider reviewing and revising which type(s) of development are encouraged in Urban and Rural areas, with special consideration given to businesses that fall within the two priority sectors identified in the Kingston Integrated Economic Development Strategy: Health and Health Innovation and Sustainable Manufacturing.

# Moving to Implementation

## NEXT STEPS

### PRE-IMPLEMENTATION REQUIREMENTS

- 1** Confirm a champion and lead for the Rural Kingston Economic Development Strategy.
- 2** Confirm the governance and implementation body and resources (human resources, financial resources, budget allocation) to be allocated to delivering the activities and outcomes for the Rural Kingston Economic Development Strategy.
- 3** Develop a detailed action and implementation plan to confirm how to mobilize growth in the identified sectors, roles and responsibilities, detailed timelines, and next steps.
- 4** Continue community and stakeholder engagement to solicit input and validation throughout the planning and implementation process.
- 5** Conduct a market validation exercise to confirm the market demand and market need by industry for new or consolidated spaces through potential hamlet and business cluster development, new residential development, and other development opportunities identified.
- 6** In partnership with Kingston Economic Development, meet with existing farmers in Rural Kingston to identify business support needed to help their businesses expand and grow in the City of Kingston. Leverage the Ontario Federation of Agriculture and the National Farmers Union for engagement, outreach, and input.

## **IMPLEMENTATION ACTIVATION**

The following components are recommended to be confirmed prior to the implementation of the recommendations contained in this report:

- ✓ Confirmation of resources (budget, people)
- ✓ Confirmation of implementation lead (organization, people, mandate)
- ✓ Completion of action and implementation plan
- ✓ Completion of market validation

Once the implementation activation points have been achieved, the following is a summary of the activities that can take place to mobilize the plan and begin to implement the recommendations.

## **SHORT-TERM NEXT STEPS (NEXT 12 TO 24 MONTHS)**

### **Logistics and Internal Mechanics**

1. Finalize additional resources that can be allocated to pursue recommendations identified. It is recommended that ideally three resources be allocated for advancing development in Rural Kingston: one resource for agriculture, one resource for rural tourism and one resource for cluster development.
2. Develop a benchmark for current performance and fine tune metrics for success to enable measurement of progress in one year, two years, and each year for the next five years.

### **Partnerships and Collaboration**

1. Work in partnership with Kingston Economic Development to identify potential investment attraction and foreign direct investment opportunities that would be suitable in Rural Kingston.

2. In partnership with Tourism Kingston, identify actions and activities needed to support agri-tourism and tourism opportunities in rural Kingston.
3. Identify and engage supporting organizations to mobilize the Rural Kingston plan and the integration with the overall Kingston Integrated Economic Development Strategy.

### **Community Engagement and Outreach**

1. Continue community and stakeholder engagement to solicit input and validation throughout the planning and implementation process.
2. In partnership with Kingston Economic Development, meet with existing farmers in rural Kingston to identify business support needed to help their businesses expand and grow in the City of Kingston.
3. Work in partnership with local developers to identify potential residential development opportunities in Rural Kingston in the identified Hamlet Areas. Identify gaps for planning and approvals required to streamline process and prepare for medium-term timeline opportunities.
4. Strengthen the value proposition and case for investment: An important part of the action plan is strengthening the case for investment. Do we need to change post-secondary programs to boost the talent pipeline? Do we need to attract more R&D investment? Do we need consider targeted incentives? Legislation or regulation changes? What else can we do to make investment in the opportunity very attractive (subject to an ROI on any investment).

**MEDIUM-TERM NEXT STEPS (NEXT 12 TO 36 MONTHS)**

1. Work in partnership with the City Planning Department at the City of Kingston to adopt a development criteria scorecard to assist with shortlisting and identifying opportunities for development in Rural Kingston.
2. In partnership with the City of Kingston Planning Department, develop a planning and land use strategy to support growth in the identified sectors (i.e., tourism and agriculture).



## SUMMARY OF RECOMMENDATIONS, POTENTIAL PARTNERS, AND TIMELINES

Each of the identified themes have associated recommendations and potential initiatives, mapped below in Figure 24. Each of the 14 recommendations require varying degrees of resources and funding, which should be assessed and mapped before the implementation period begins. Following the confirmation of

implementation lead (see Pre-Implementation Requirements) recommendations will be championed by the identified choice, and supported and / or partially led by the potential partners indicated below.

**Figure 24: Implementation activities**

Recommendation(s)	Potential Initiatives	Potential Partners	Short Term (next 12 to 24 months)	Medium Term (next 3 to 5 years)	Long Term (next 5 to 10 years)
<b>Development Opportunities</b>					
<b>1. Attract new farmers</b>	Review the City of Kingston’s zoning bylaws with a focus on the attraction of new / young / immigrant farmers. Explore options for temporary housing and smaller houses / accommodations on farm property.	City Planning Department		✓	
	Develop a match-making process to bring aspiring young farmers together with farmers approaching retirement. Integrate a mentorship transition period to allow for transfer of skills.	Kingston Economic Development		✓	
	Set up a process to help new farmers develop business plans. Leverage community assets and programs (Queen’s, St. Lawrence College) to provide business training (strategic planning, event management, information management) to newer farmers.	Kingston Economic Development			✓
<b>2. Encourage local food consumption</b>	Deliberately seek ways to connect producers to local markets and seek ways to promote awareness of local food supply chains. Consider investment in craft breweries, organic bakeries, CSAs, and similar small-scale operations.	TBD		✓	✓
	Support farmers markets and onsite farm stores. Consider farm tour festivals / open houses to encourage urban dwellers to visit local farmers and stores.	TBD		✓	✓
	Implement an ongoing campaign to encourage local food consumption, similar to the “Love Kingston” campaign.	TBD	✓	✓	✓
	Support initiatives focused on addressing food security. Explore a city-wide food security policy, and leverage community assets to encourage similar policies in schools and PSEs.	TBD			✓

Figure 24: Implementation activities (con't)

Recommendation(s)	Potential Initiatives	Potential Partners	Short Term (next 12 to 24 months)	Medium Term (next 3 to 5 years)	Long Term (next 5 to 10 years)
<b>Development Opportunities (con't)</b>					
	Investigate, support, and champion local businesses and their export journeys. Consider supporting local businesses through ecommerce initiatives.	TBD	✓		
<b>3. Foster innovation in farming</b>	Develop partnerships with other local farm communities, new precision agriculture companies, and PSE researchers.	TBD		✓	
	Create a broadband plan to expedite improved access for rural communities	Utilities Kingston		✓	✓
<b>4. Look for niche and value-added food production opportunities</b>	Support local food procurement through local food procurement policies that support local and regional farmers and designating a staff member as a Local Food Entrepreneur in Residence and marketing Coordinator.	TBD		✓	✓
	Deliberately seek ways to connect producers to local markets and seek ways to promote awareness of local food supply chains. Consider investment in craft breweries, organic bakeries, CSAs, and similar small-scale operations.	TBD		✓	
	Compile and create a comprehensive list / database of available federal and provincial funding for value-added and niche farming opportunities.	TBD	✓		
<b>5. Hamlet Development Opportunities</b>	Establish a process for redirecting and developing commercial opportunities development in the hamlets. This process should include a more thorough analysis of demand, an identification of potential service providers and the promotion of opportunities to potential service providers.	TBD	✓	✓	
<b>6. Redirect Residential Development</b>	Develop a formalized rural settlement strategy for Rural Kingston. Encourage the residential housing development sector to consider hamlet-based housing development and explore opportunities to support seniors and newcomers to rural residential, development, and commercial opportunities.	Local Developers			✓
<b>7. Commercial Business Activity</b>	Assess and investment in rural infrastructure. Explore rural broadband connectivity and evaluate the potential demand for transportation / ride sharing services between the hamlets and Urban Kingston.	Utilities Kingston		✓	

Figure 24: Implementation activities (con't)

Recommendation(s)	Potential Initiatives	Potential Partners	Short Term (next 12 to 24 months)	Medium Term (next 3 to 5 years)	Long Term (next 5 to 10 years)
<b>Development Opportunities (con't)</b>					
<b>8. Animate Tourism Opportunities</b>	Explore tourism accommodation expansion, including farm-based accommodation / agritourism / dude ranch experiences; bed and breakfasts; small hotels / inns; high-end glamping resort / sky beds; winter camping.	Tourism Kingston		✓	
	Expand agri-tourism opportunities such as sugar shacks, U-Picks, corn mazes, farmstays, cooking / craft workshops, and other interactive tourism.	Tourism Kingston		✓	
	Increase access to adventures and tourism experiences such as horseback riding, bird watching tours, treetop adventure, etc.	Tourism Kingston		✓	
	Encourage more use of smart technologies in the agriculture sector by engaging in local agri-tech companies for innovation farming technology. Promote and share stories of innovative technology in rural agricultural farms.	TBD		✓	
	Establish an innovation forum to bring together small farmers, academics, researchers, chefs, and other specialists to brainstorm ways to foster innovation in agri-tourism.	TBD		✓	
	Consider and support innovative technology (e.g., vertical farming, aquaponics, hydroponics), similar to the vertical farming facility at Local Leaf Farms.	TBD			✓
	Work in partnership with existing organizations (such as Invest Ottawa, Queen's Innovation and Partnerships Office) to leverage and attract more investment into innovative agriculture.	Queen's University			✓
<b>9. Encourage Agri-Tourism Initiatives</b>	Explore the opportunity to consolidate the rural construction industry into a centralized park.	Business Owners, Construction Industry			✓
	Explore office complex development to include professional, scientific, and technical businesses along with co-working spaces.	Local & Regional Developers		✓	
	Explore value-added agricultural and food production opportunities.	Farmers, Farm Credit Canada			✓
	Explore the development of a warehousing centre for value-added food production.	TBD			✓
<b>10. Encourage industry-focused business cluster development</b>					

Figure 24: Implementation activities (con't)

Recommendation(s)	Potential Initiatives	Potential Partners	Short Term (next 12 to 24 months)	Medium Term (next 3 to 5 years)	Long Term (next 5 to 10 years)
<b>Development Opportunities (con't)</b>					
<b>10. Encourage industry-focused business cluster development</b>	Explore the development of a distribution centre for value-added food production and distribution.	TBD			✓
<b>11. Leverage Opportunities that Capitalize on 401 Access</b>	Explore foreign direct investment opportunities that capitalize on access to Highway 401. Includes: distribution, warehousing, transportation, logistics, and manufacturing.	Kingston Economic Development		✓	
<b>Enablers</b>					
	Assess current hamlet zoning	City Planning Department		✓	
<b>12. Project Selection and Approval Process</b>	Revise planning processes and documentation	City Planning Department		✓	
	Adopt development selection scorecard for future development opportunities	City Planning Department		✓	
<b>13. Explore Funding Opportunities</b>	Leverage federal and provincial broadband funding	TBD	✓	✓	✓
	Leverage federal and provincial agriculture funding	TBD	✓	✓	✓
<b>14. Explore Alternative Servicing Options</b>	Review best practices and trends	City Building Department/Utilities Kingston	✓		
	Explore innovative options	City Building Department/Utilities Kingston		✓	✓

## ALIGNMENT OF RECOMMENDATIONS AND TARGET METRICS

Figure 25: Alignment of recommendations and target metrics, by theme

Theme	Recommendation	Support New Business Start-ups	Business Expansion Potential	Investment Attraction	Opportunity for R&D and Innovation	Supports Newcomers and Immigrant Businesses	Community Engagement	Leverages and Builds Infrastructure & Assets
Support Agricultural Activities and Businesses	1. Attract new farmers	●	●			●		
	2. Encourage local food consumption					●	●	●
	3. Foster innovation in farming				●	●		
	4. Look for niche and value-added food production opportunities		●	●	●	●		
Plan Hamlet-led Development	5. Develop hamlet-based development opportunities	●	●					●
	6. Encourage concentrated residential development	●	●					●
	7. Attract commercial business activities to the hamlets, and support current firms	●	●	●				
Revitalize Tourism Opportunities	8. Animate tourism opportunities	●	●				●	●
	9. Encourage agri-tourism initiatives	●	●				●	●
Develop Strategic Rural Business Clusters	10. Encourage a construction-focused business park	●	●	●				
	11. Encourage locations with proximity to Highway 401	●	●	●				

Figure 25: Alignment of recommendations and target metrics, by theme (con't)

Theme	Recommendation	Support New Business Start-ups	Business Expansion Potential	Investment Attraction	Opportunity for R&D and Innovation	Supports Newcomers and Immigrant Businesses	Community Engagement	Leverages and Builds Infrastructure & Assets
Process Improvement	12. Process and Selection Approval Process	●	●	●				
Funding Assessment	13. Explore Funding Options	●	●	●			●	●
Servicing Assessment	14. Explore Alternative Servicing Options	●	●	●				

## ALIGNMENT OF RECOMMENDATIONS AND TARGET OUTCOMES

Figure 26: Alignment of recommendations and target outcomes, by theme

Theme	Recommendation	Industry Growth in Core Sectors	Clustered Development	Cohesive Approach	Short-term Opportunity	Long-term Potential	Supports Residential Growth	Business Expansion, Investment Attraction Potential
Support Agricultural Activities and Businesses	1. Attract new farmers	●	●		●	●		●
	2. Encourage local food consumption	●	●		●	●		●
	3. Foster innovation in farming	●	●		●	●		●
	4. Look for niche and value-added food production opportunities	●	●		●	●		●

Figure 26: Alignment of recommendations and target outcomes, by theme (con't)

Theme	Recommendation	Industry Growth in Core Sectors	Clustered Development	Cohesive Approach	Short-term Opportunity	Long-term Potential	Supports Residential Growth	Business Expansion, Investment Attraction Potential
Plan Hamlet-led Development	5. Develop hamlet-based development opportunities	●	●	●		●	●	●
	6. Encourage concentrated residential development		●	●		●	●	●
	7. Attract commercial business activities to the hamlets, and support current firms	●	●	●		●	●	●
Revitalize Tourism Opportunities	8. Animate tourism opportunities	●	●	●		●		●
	9. Encourage agri-tourism initiatives	●	●	●		●		●
Develop Strategic Rural Business Clusters	10. Encourage a construction-focused business park	●	●	●	●	●		●
	11. Encourage locations with proximity to Highway 401		●	●		●		●
Process Improvement	12. Process and Selection Approval Process	●	●	●		●	●	●
Funding Assessment	13. Explore Funding Options	●	●	●	●	●	●	●
Servicing Assessment	14. Explore Alternative Servicing Options		●	●	●	●	●	●

# Appendix A: Rural Population Breakdown

## POPULATION CHANGE

It is problematic to provide an exact comparison of population changes over time as the geographic boundaries of the rural Kingston Dissemination Areas have changed over time. Using the Census Tract (CT) data, which did not change, a review of population growth or decline can be better determined.

In the two rural CTs, the population over time had been slowly declining. Between 2006 and 2016, the population declined by 2.5 per cent. The story in the three mixed CTs (those with rural and urban populations) showed a population growing very quickly, up nearly 46 per cent during the 10-year period compared to city-wide population growth of only 5.6 per cent. To put this data into context, these three mixed Census Tracts added 7,555 to the population during this period compared to 6,591. In other words, the combined population outside the three urban / rural CTs declined between 2006 and 2016.

Because the Dissemination Area boundaries changed, it is difficult to accurately determine where the population growth had been between 2006 and 2016 within the three urban / rural CTs. A review of development maps, however, indicated the bulk of population growth during this period occurred in the mostly urban parts of the three CTs.

## POPULATION DENSITY

Rural Kingston accounted for the bulk of land area within the city limits. Rural Kingston, as defined above, was 372.8 square kilometres or 83 per cent of the land area of the city. Rural Kingston had a population density of 51 per square kilometre compared to 1,337 people per square kilometre in urban Kingston. There were some small clusters of population in rural Kingston by not many (particularly in the area close to the urban population). Most dwellings were spread out.

**Figure 27: Population change, 2006-16, by selected census tracts**

	Rural CTs	Rural / Urban CTs	City of Kingston
Population, 2016	9,493	24,079	123,798
Population, 2006	9,738	16,524	117,207
Population percentage change, 2006 to 2016	-2.5%	+45.7%	+5.6%

Source: Statistics Canada, 2016

**Figure 28: Population density, 2016<sup>28</sup>**

	Rural Kingston	Urban Kingston	City of Kingston	Fully Rural Census Tracts	
				0101.00	0113.02
Population, 2016	18,980	104,818	123,798	4,174	5,319
Total private dwellings	7,456	52,521	59,977	1,594	2,028
Population density per square kilometer	50.9	1,336.8	274.4	23.7	36.3
Land area in square kilometers	372.8	78.4	451.2	176.0	147.0 <sup>29</sup>

Source: Statistics Canada, 2016

## POPULATION BY AGE GROUP

In 2019, the median age in the Kingston CMA was 41.9 years, moderately above average when compared to other CMAs across the country. The median age had declined since 2016 (42.4 years), however, due to the attraction of a younger population in recent years. In 2016, the median age in the city was 41.9 compared to 44.9 in rural Kingston. The

two fully rural Census Tracts had a median age of 49.5. These CTs were growing older faster, too. Between 2006 and 2016, the median age increased by 13 per cent in the two rural CTs, compared to a six per cent increase in the rural / urban CTs and five per cent across the city.

**Figure 29: Population by age group, 2016<sup>30</sup>**

	Rural Kingston	Urban Kingston	Rural CTs	Rural / Urban CTs	City of Kingston
0 to 14 years	14.8%	14.6%	13.2%	19.1%	14.6%
15 to 64 years	64.1%	66.3%	65.4%	65.2%	66.0%
65 years and greater	21.1%	19.1%	21.4%	15.7%	19.4%
Median age of the population	44.9	41.3	49.5	41.0	41.9

Source: Statistics Canada, 2016

# Appendix B: Rural Industry Breakdown

Figure 30: Comparison of industry concentrations by census tracts table<sup>31</sup>

Industry by Concentration	0113.02	0101.00	0113.01	0100.02	0112.03
1	Construction	Construction	Construction	Professional, scientific and technical services	Accommodation and food services
2	Retail trade	Administrative and support and waste management and remediation services	Other services (except public administration)	Administrative and support and waste management and remediation services	Retail trade
3	Other services (except public administration)	Accommodation and food services	Administrative and support and waste management and remediation services	Manufacturing	Professional, scientific and technical services
4	Professional, scientific and technical services	Agriculture, forestry, fishing and hunting	Retail trade	Agriculture, forestry, fishing and hunting	Construction
5	Administrative and support and waste management and remediation services	Retail trade	Professional, scientific and technical services	Accommodation and food services	Transportation and warehousing
6	Manufacturing	Professional, scientific and technical services	Transportation and warehousing	Retail trade	Health care and social assistance
7	Transportation and warehousing	Other services (except public administration)	Educational services	Health care and social assistance	Management of companies and enterprises
8	Arts, entertainment, and recreation	Real estate and rental and leasing	Arts, entertainment, and recreation	Construction	N/a
9	Wholesale trade	Arts, entertainment, and recreation	Public administration	Wholesale trade	N/a
10	Real estate and rental and leasing	Wholesale trade	Manufacturing	Real estate and rental and leasing	N/a

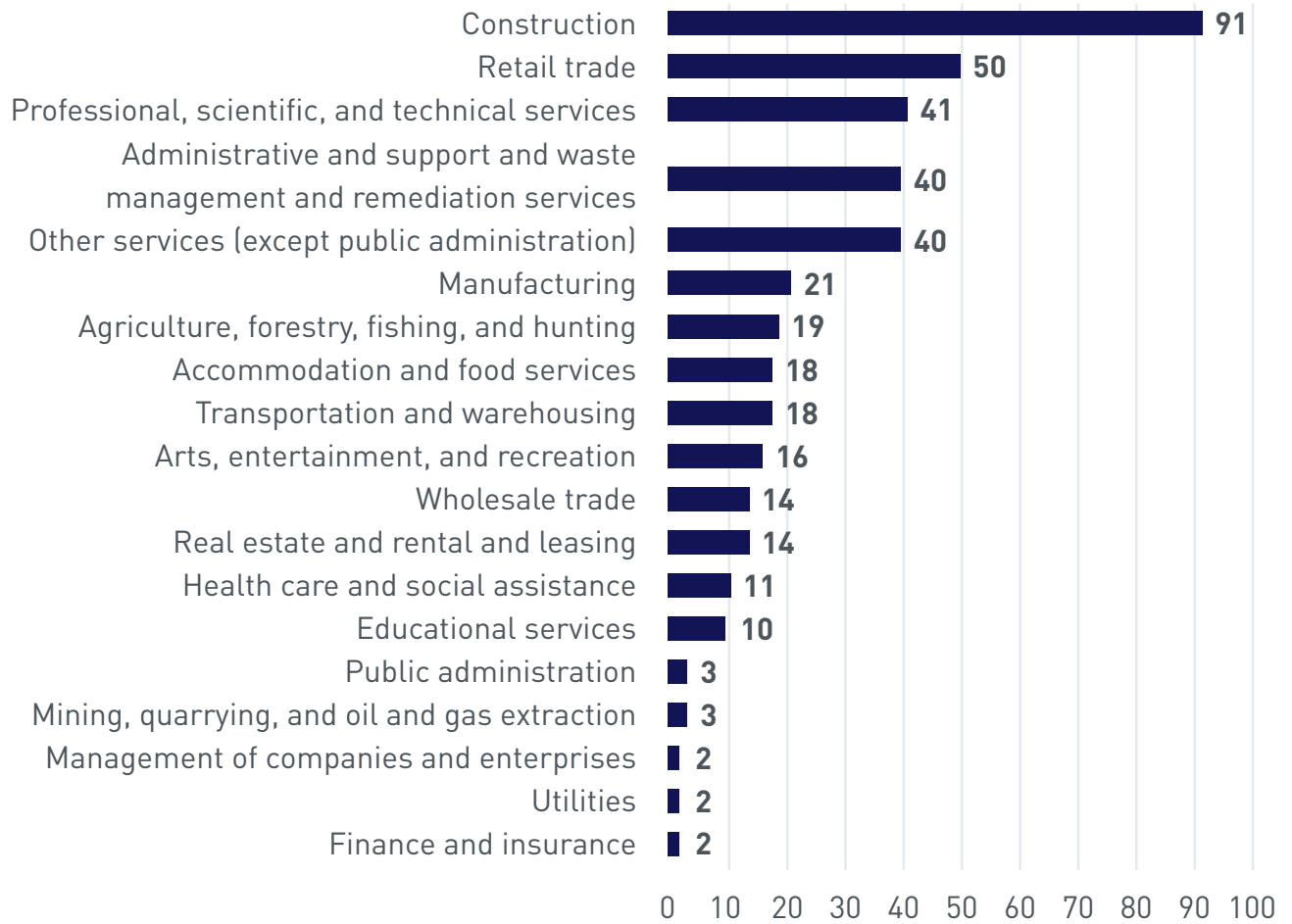
Source: Stiletto Analysis, 2020

Figure 31: Rural Kingston 2-Level NAICS breakdown table (all census tracts)<sup>32</sup>

2-Level NAICS	Business Count	Percentage of Rural Kingston Businesses
Construction	91	20.3%
Retail trade	50	11.1%
Professional, scientific, and technical services	41	9.1%
Administrative and support and waste management and remediation services	40	8.9%
Other services (except public administration)	40	8.9%
Manufacturing	21	4.7%
Agriculture, forestry, fishing, and hunting	19	4.2%
Accommodation and food services	18	4.0%
Transportation and warehousing	18	4.0%
Arts, entertainment, and recreation	16	3.6%
Wholesale trade	14	3.1%
Real estate and rental and leasing	14	3.1%
Health care and social assistance	11	2.4%
Educational services	10	2.2%
Mining, quarrying, and oil and gas extraction	3	0.7%
Public administration	3	0.7%
Management of companies and enterprises	2	0.4%
Finance and insurance	2	0.4%
Utilities	2	0.4%

Source: Stiletto Analysis, 2020

**Figure 32: Rural Kingston Business Count by 2-Level NAICS (All Census Tracts)<sup>33</sup>**



Source: Stiletto Analysis, 2020

# Appendix C: Rural Development in Other Cities with Large Rural Areas

Figure 33: Rural development of comparable cities with large rural areas

Jurisdiction	Population per Square Kilometer	Rural Strategy?	Aligned with Integrated Strategy?	Priorities	Actions
Abbotsford, BC <sup>34</sup>	376	No	No	<ul style="list-style-type: none"> <li>Protect and Manage Rural and Recreational Lands</li> </ul>	N/A
Chatham-Kent, ON <sup>35</sup>	41	No	Yes	<ul style="list-style-type: none"> <li>Protect and preserve the historic character of established Rural Settlement Areas</li> <li>Permit development of recreational residential uses in locations that are in close proximity to water corridors</li> <li>Plan and protect road corridors to provide for future urban and rural road systems</li> <li>Encourage new industrial opportunities that are not related to agriculture</li> </ul>	<ul style="list-style-type: none"> <li>Development in the privately services Rural Settlement Areas shall be limited to minor infilling</li> <li>New development in Rural Settlement Areas shall complement their historic character and cultural heritage</li> <li>Potential expansions to the boundaries of the designated Rural Settlement Areas shall be discouraged</li> </ul>
Clarington, ON <sup>36</sup>	150	No	Yes	<ul style="list-style-type: none"> <li>Preserve, enhance, and promote the cultural and historical attributes of hamlets and other rural settlements</li> <li>Reinforce hamlets as the predominant and preferred locations for rural growth</li> <li>Ensure development in the rural areas is adequately services and does not impact soil, water, and other natural resources</li> <li>Support a diversified healthy and productive agricultural industry</li> </ul>	<ul style="list-style-type: none"> <li>Promotion of tourism nodes</li> </ul>

Figure 33: Rural development of comparable cities with large rural areas (con't)

Jurisdiction	Population per Square Kilometer	Rural Strategy?	Aligned with Integrated Strategy?	Priorities	Actions
Greater Sudbury <sup>37</sup>	50	No	No	<ul style="list-style-type: none"> <li>• Provide an efficient and orderly pattern of land use, reducing land use conflicts and requiring minimal municipal services</li> <li>• Recognize importance of agriculture, silviculture and other rural land uses to the economy</li> <li>• Preserve the cultural and historical attributes of rural areas</li> <li>• Promote opportunities to support a diversified rural economy by protecting agricultural and other resource-related uses.</li> </ul>	N/A
Halifax, NS <sup>38</sup>	73	No	Yes	<p>Goal:</p> <ul style="list-style-type: none"> <li>• Direct 25% of city growth to rural areas.</li> </ul> <p>Priorities:</p> <ul style="list-style-type: none"> <li>• Improve Rural Community Design</li> <li>• Promoting rural industrial parks in accordance with the Business Park Functional Plan</li> <li>• Supporting agriculture and other traditional rural resource industries (e.g., forestry, fishing)</li> <li>• Creating opportunities, including appropriate zoning, to direct rural businesses to locations within designated growth areas</li> <li>• Maintain integrity of rural communities</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure rural HRM is considered in NSCC's development of a Rural Innovation District</li> <li>• Grow rural economic development by focusing on broadband/cellular infrastructure, tourism, resource extraction, agriculture, and business retention and expansion activities</li> </ul>
Levis, QC	319	No	No	N/A	N/A

Figure 33: Rural development of comparable cities with large rural areas (con't)

Jurisdiction	Population per Square Kilometer	Rural Strategy?	Aligned with Integrated Strategy?	Priorities	Actions
Ottawa, ON <sup>39</sup>	335	Yes	Yes	<ol style="list-style-type: none"> <li>1. Supportive Business Environment</li> <li>2. Vibrant Rural Lifestyle</li> <li>3. Strengthened Rural Tourism Position</li> <li>4. Innovation in Agriculture and Agri-food Production</li> <li>5. Advocating for Rural Priorities</li> </ol>	<ol style="list-style-type: none"> <li>1. Supportive Business Environment                             <ul style="list-style-type: none"> <li>• Rural business tool-kit</li> <li>• Rural business workshop series to promote toolkit</li> <li>• Identify opportunities and develop marketing materials to encourage investment</li> </ul> </li> <li>2. Vibrant Rural Lifestyle                             <ul style="list-style-type: none"> <li>• Support seniors with the Ontario Renovated Program</li> <li>• Study of broadband connectivity</li> <li>• Engage in rural storytelling through social media</li> <li>• Organize familiarization tours with immigrant settlement agencies</li> </ul> </li> <li>3. Strengthened Rural Tourism Position                             <ul style="list-style-type: none"> <li>• Work with villages to define their rural tourism value proposition</li> <li>• Deliver presentations to rural stakeholders about Ottawas brand and leveraging it</li> <li>• Explore opportunities to showcase rural Ottawa</li> <li>• Appeal to conference delegates</li> <li>• Identify rural ambassadors</li> <li>• Engage with eligible rural tourism entrepreneurs</li> </ul> </li> <li>4. Innovation in Agriculture and Agri-food Production                             <ul style="list-style-type: none"> <li>• Leverage L5 site to investigate the development of nationally-significant smart farm in Ottawa through industry-led collaborations</li> <li>• Buy local / farm to table marketing campaign</li> </ul> </li> <li>5. Advocating for Rural Priorities                             <ul style="list-style-type: none"> <li>• Advocate to province and federal gov to expand definition of rural communities</li> </ul> </li> </ol>
Saint John, NB <sup>40</sup>	213	No	No	<ul style="list-style-type: none"> <li>• Protect natural and rural areas</li> <li>• Reduce the amount of rural sprawl</li> </ul>	<ul style="list-style-type: none"> <li>• Direct development to urban areas, with the exception of the appropriate use of some rural lands for resource development purposes.</li> </ul>
St. John's, NL <sup>41</sup>	244	No	No	<ul style="list-style-type: none"> <li>• Creating a residential rural area where people can enjoy a rural lifestyle based on large rural lot development with private services</li> <li>• Opportunity for agricultural development in a way that respects nearby residential development</li> </ul>	N/A

# Appendix D: Provincial Policy Statement, 2020 – Rural Lands

The Provincial Policy Statement provides policy direction on matters of provincial interest related to land use planning and development. As a key part of Ontario's policy-led planning system, the Provincial Policy Statement sets the policy foundation for regulating the development and use of land. It also supports the provincial goal to enhance the quality of life for all Ontarians. The Provincial Policy Statement provides for appropriate development while protecting resources of provincial interest, public health and safety, and the quality of the natural and built environment. The Provincial Policy Statement supports improved land use planning and management, which contributes to a more effective and efficient land use planning system.

## RURAL AREAS IN MUNICIPALITIES

The Provincial Policy Statement provides specific guidance for the development of rural areas within municipality boundaries. It states that healthy, integrated and viable rural areas should be supported by:

- a) building upon rural character, and leveraging rural amenities and assets;
- b) promoting regeneration, including the redevelopment of brownfield sites;
- c) accommodating an appropriate range and mix of housing in rural settlement areas;
- d) encouraging the conservation and redevelopment of existing rural housing stock on rural lands;
- e) using rural infrastructure and public service facilities efficiently; promoting diversification of the economic base and employment opportunities through goods and services, including value-added products and the sustainable management or use of resources;
- f) providing opportunities for sustainable and diversified tourism, including leveraging historical, cultural, and natural assets;
- g) conserving biodiversity and considering the ecological benefits provided by nature; and,
- h) providing opportunities for economic activities in prime agricultural areas.

Further, the Provincial Policy Statement states that in rural areas within municipalities, rural settlement areas shall be the focus of growth and development and their vitality and regeneration shall be promoted.

## RURAL LANDS IN MUNICIPALITIES

When directing development on rural lands, a planning authority shall apply the relevant policies of the Provincial Policy Statement's Section 1: Building Strong Healthy Communities, as well as the policies of Section 2: Wise Use and Management of Resources and Section 3: Protecting Public Health and Safety. 1.1.5.2

On rural lands located in municipalities, permitted uses are:

- a) the management or use of resources;
- b) resource-based recreational uses (including recreational dwellings);
- c) residential development, including lot creation, that is locally appropriate;
- d) agricultural uses, agriculture-related uses, on-farm diversified uses and normal farm practices, in accordance with provincial standards;
- e) home occupations and home industries;
- f) cemeteries; and,
- g) other rural land uses.

Further:

- Recreational, tourism and other economic opportunities should be promoted.
- Development that is compatible with the rural landscape and can be sustained by rural service levels should be promoted.
- Development shall be appropriate to the infrastructure, which is planned or available, and avoid the need for the unjustified and / or uneconomical expansion of this infrastructure.
- Opportunities should be retained to locate new or expanding land uses that require separation from other uses.
- Opportunities to support a diversified rural economy should be promoted by protecting agricultural and other resource-related uses and directing non-related development to areas where it will minimize constraints on these uses.
- New land uses, including the creation of lots, and new or expanding livestock facilities, shall comply with the minimum distance separation formulae.

# Endnotes

All hyperlinks within have been validated as of the date of this research report.

- <sup>1</sup> "Census Profile, 2016 Census," Statistics Canada, 2016, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CMACA&Code1=521&Geo2=PR&Code2=35&Data=Count&SearchText=kingston&SearchType=Begins&SearchPR=01&B1=All&TABID=1>
- <sup>2</sup> "Census Tract (CT)," Statistics Canada, September 17, 2018, <https://www150.statcan.gc.ca/n1/pub/92-195-x/2011001/geo/ct-sr/ct-sr-eng.htm>
- <sup>3</sup> "Census Profile, 2016 Census," Statistics Canada, 2016, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CMACA&Code1=521&Geo2=PR&Code2=35&Data=Count&SearchText=kingston&SearchType=Begins&SearchPR=01&B1=All&TABID=1>
- <sup>4</sup> "KMaps," City of Kingston, October 2020, <https://www.cityofkingston.ca/explore/maps/kmaps>
- <sup>5</sup> "Population and Dwelling Count Highlight Tables, 2016 Census," Statistics Canada, 2016, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/hltfst/pd-pl/Table.cfm?Lang=Eng&T=201&S=3&O=D>
- <sup>6</sup> "Focus on Geography Series, 2016 Census," Statistics Canada, 2016, <https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-CMA-Eng.cfm?TOPIC=1&LANG=Eng&GK=CMA&GC=521>
- <sup>7</sup> "Kingston [Population Centre], Ontario and Ontario (Province), [Table]," Census Profile, Statistics Canada, November 2017, <https://www12.statcan.gc.ca/census-recensement/2016/>
- <sup>8</sup> "Kingston [Population Centre], Ontario and Ontario (Province), [Table]," Census Profile, Statistics Canada, November 2017, <https://www12.statcan.gc.ca/census-recensement/2016/>
- <sup>9</sup> Stiletto Analysis, 2020
- <sup>10</sup> "Farms Classified by Total Farm Area," Statistics Canada, 2016, <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3210040401>
- <sup>11</sup> "Census Profile, 2016 Census," Statistics Canada, 2016, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CMACA&Code1=521&Geo2=PR&Code2=35&SearchText=Kingston&SearchType=Begins&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=521&TABID=1&type=0>  
"Farms Classified by Total Farm Area," Statistics Canada, 2016, <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3210040401>
- <sup>12</sup> "Cluster / Open Space Development," Chester County Planning Commission, 2018, <https://www.chescoplanning.org/MuniCorner/Tools/Cluster.cfm#:~:text=Cluster%20development%20is%20a%20land,for%20protection%20by%20the%20municipality>
- <sup>13</sup> "Employment and Unemployment Rate, Annual, Population Centres and Rural Areas," Statistics Canada, 2016, <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410010601>
- <sup>14</sup> Lydia McNutt, "Canadian Housing Market Outlook (Fall 2020)," RE/MAX, September 2020, <https://blog.remax.ca/canadian-housing-market-outlook/>
- <sup>15</sup> Aileen Doyle, "'We have had Record Sales,' Real Estate Market has Dramatic Rebound in Cottage Country," *CTV News*, July 2020, <https://barriere.ctvnews.ca/we-have-had-record-sales-real-estate-market-has-dramatic-rebound-in-cottage-country-1.5019870>
- <sup>16</sup> "Agriculture and Food Statistics," Statistics Canada, 2020, [https://www.statcan.gc.ca/eng/subjects-start/agriculture\\_and\\_food](https://www.statcan.gc.ca/eng/subjects-start/agriculture_and_food)
- <sup>17</sup> "Farmer 4.0," RBC Thought Leadership, August 2019, [http://www.rbc.com/economics/economic-reports/pdf/other-reports/Farmer4\\_aug2019.pdf](http://www.rbc.com/economics/economic-reports/pdf/other-reports/Farmer4_aug2019.pdf)
- <sup>18</sup> "GDP at Basic Prices, Agriculture, Other Primary Sectors and Utilities, Kingston CMA (\$Millions, 2012)," Conference Board of Canada, 2020
- <sup>19</sup> "The Economics of Local Food Systems," United States Department of Agriculture, March 2016, <https://www.ams.usda.gov/sites/default/files/media/Toolkit%20Designed%20FINAL%203-22-16.pdf>
- <sup>20</sup> "Detailed Food Spending, Canada, Ontario," Statistics Canada, 2017, <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1110012501>
- <sup>21</sup> "Hamlet Executive Dashboard," Environics Analytics, 2020, <https://environicsanalytics.com/en-ca/data/demographic>
- <sup>22</sup> Stiletto Analysis, 2020
- <sup>23</sup> This survey was based on Canadian travellers only.
- <sup>24</sup> "Number of Census Metropolitan Area Visits, Expenditures and Nights, by Canadian Residents, by Visit Duration, Inactive (x1000)," 2017, <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=2410003001>
- <sup>25</sup> "Our Vision," Local Leaf Farms Inc., n.d., <https://localleafarms.com/about-us.html>
- <sup>26</sup> "Smart Building Market Size to Hit US\$ 127.09 Bn by 2027," Global News Wire, September 23, 2020, <https://www.globenewswire.com/news-release/2020/09/23/2098005/0/en/Smart-Building-Market-Size-to-Hit-US-127-09-Bn-by-2027.html>
- <sup>27</sup> "Our Vision," Local Leaf Farms Inc., n.d., <https://localleafarms.com/about-us.html>

- <sup>28</sup> "Kingston [Population Centre], Ontario and Ontario (Province), (Table)," Census Profile, Statistics Canada, November 2017, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CMACA&Code1=521&Geo2=PR&Code2=35&SearchText=Kingston&SearchType=Begins&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=521&TABID=1&type=0>
- <sup>29</sup> "Kingston [Population Centre], Ontario and Ontario (Province), (Table)," Census Profile, Statistics Canada, November 2017, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CMACA&Code1=521&Geo2=PR&Code2=35&SearchText=Kingston&SearchType=Begins&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=521&TABID=1&type=0>
- <sup>30</sup> "Kingston [Population Centre], Ontario and Ontario (Province), (Table)," Census Profile, Statistics Canada, November 2017, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CMACA&Code1=521&Geo2=PR&Code2=35&SearchText=Kingston&SearchType=Begins&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=521&TABID=1&type=0>
- <sup>31</sup> Stiletto Analysis, 2020
- <sup>32</sup> Stiletto Analysis, 2020
- <sup>33</sup> Stiletto Analysis, 2020
- <sup>34</sup> "Official Community Plan Bylaw, 2016," City of Abbotsford, 2016, <https://municipal.qp.gov.bc.ca/civix/content/coa/coabylaws/o/ocp/?xsl=/templates/browse.xsl>
- <sup>35</sup> "Chatham-Kent Official Plan: Action Toward Sustainability," Chatham-Kent, November 2018, <https://www.chatham-kent.ca/PlanningServices/Documents/Official%20Plan/Official%20Plan/CK%20OP%20Office%20Consolidation.pdf>
- <sup>36</sup> "Municipality of Clarington Official Plan," Clarington, 2018, <https://www.clarington.net/en/do-business/resources/Official-Plan/Clarington-Official-Plan.pdf>
- <sup>37</sup> "City of Greater Sudbury Official Plan," City of Greater Sudbury, 2019, <https://www.greatersudbury.ca/city-hall/reports-studies-policies-and-plans/official-plan/official-plan/op-pdf-documents/current-op-text/>
- <sup>38</sup> "Halifax's Economic Growth Plan 2016-21," Halifax Partnership, 2016, <https://halifaxpartnership.com/sites/default/uploads/pages/downloads/Halifax-Economic-Growth-Plan-Action-Plan-Years-3-5-June-2018-FINAL-Web.pdf>
- <sup>39</sup> "City of Ottawa Rural Economic Development Strategy (Draft)," MDB Insight, March 2020, [https://documents.ottawa.ca/sites/documents/files/rural\\_economicstrategy\\_en.pdf](https://documents.ottawa.ca/sites/documents/files/rural_economicstrategy_en.pdf)
- <sup>40</sup> "Growth Strategy: Saint John's Choice & Change," PlanSJ, March 2011, <https://www.saintjohn.ca/site/media/SaintJohn/Growth%20Strategy-web.pdf>
- <sup>41</sup> "St. John's Municipal Plan," City of St. John's, June 2003, <http://www.stjohns.ca/sites/default/files/files/publication/St.%20John%27s%20Municipal%20Plan%2C%20August%202020.pdf>