

The logo for Visit Seattle, featuring the word "VISIT" in a smaller, uppercase font above the word "seattle" in a larger, lowercase font, both in white text on an orange rectangular background.

VISIT  
seattle

MONDAY, NOVEMBER 6, 2017

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# STIA Ratepayers Annual Meeting

A blue-tinted photograph of the Seattle skyline, showing various skyscrapers and buildings along the waterfront, with the water in the foreground reflecting the city.

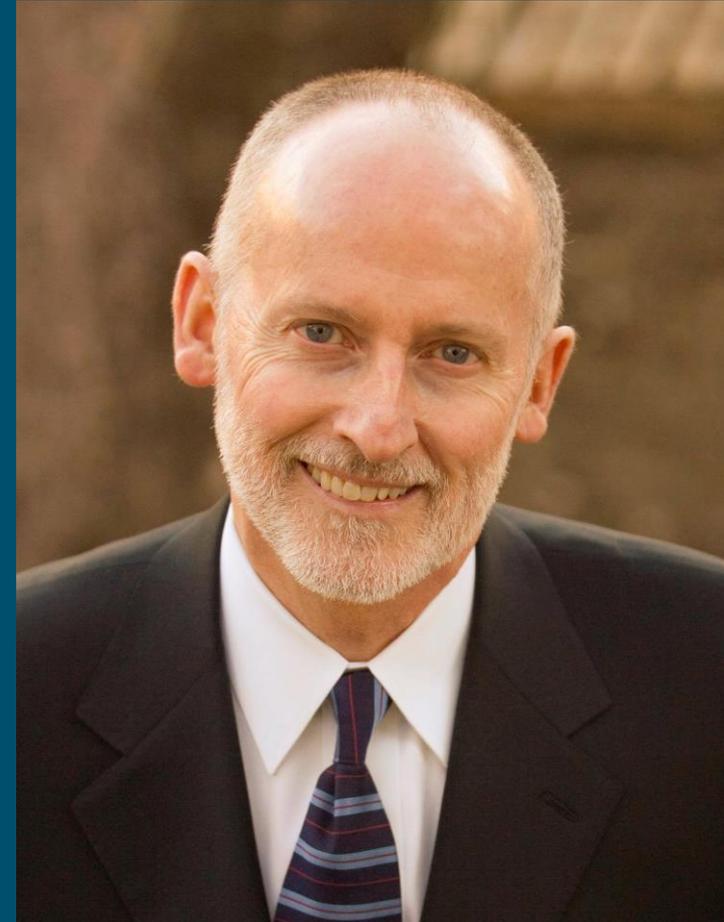
# Welcome

## Introduction & Updates

TOM NORWALK

# Mayor Tim Burgess

## Leadership Certificate



Sean  
O'Rourke

GM of the Year  
*Washington  
Hospitality  
Association*



# Board Governance

AMANDA PARSONS

# 2017 Advisory Board

AMANDA PARSONS

# 2017 Advisory Board



**David Dolquist**  
*Chair*  
Seattle Marriott Waterfront



**Amanda Parsons**  
*Vice-Chair*  
Thompson Hotel Seattle



**Rene Neidhart**  
*At-Large*  
Renaissance Hotel Seattle



**Howard Cohen**  
Clise Properties



**Frank Finneran III**  
Springhill Suites Seattle  
Downtown



**Richard Hill**  
W Hotel Seattle



**Pritpal Singh**  
Hotel 1000



**Shannon Sheron**  
Motif Seattle



**Ben Thiele**  
The Palladian Hotel



**Marcus  
Treppenhauer**  
Fairmont Olympic Hotel



**Bill Weise**  
Silver Cloud Hotel – Seattle  
Stadium

# Ratepayers Annual Meeting

Minutes Approval 11/14/16

AMANDA PARSONS

# Introductions

## 2018 New Advisory Board Members

AMANDA PARSONS

# 2018

Advisory Board  
Term Extension  
through end of 2018



**Amanda Parsons**

Thompson Hotel Seattle

# 2018

## New Advisory Board Members (3-year term)



**Keith Buck**  
Embassy Suites Seattle  
Downtown – Pioneer Square



**John Power**  
Loews Hotel 1000



**Hayden Lingerfelt**  
Kimpton Hotel Vintage  
Seattle

# Greg Duff

GARVEY SCHUBERT BARER

# 2017 STIA Review

JOHN BOESCHE | ALI DANIELS

STIA

# International Tourism Overview

JOHN BOESCHE

# Total Overseas Visitors to Seattle



Between 2011 and 2016 visitor arrivals increased to 651,700 from 473,800, a total increase of 37.6% in 5 years.

# International Visitors to Seattle

2016 - 2017 & 2018 Projections ('000s)

COUNTRY	2016	2017	2016 v. 2017 Percent Change	2018 Projections	2017 v. 2018 Percent Change
Canada	1,605.0	1,674.3	4.3%	1,699.0	1.5%
China	166.3	197.0	18.5%	208.8	6.0%
South Korea	64.3	64.7	0.6%	67.9	4.9%
United Kingdom	60.8	60.1	-1.2%	61.6	2.5%
Japan	45.8	47.4	3.5%	49.5	4.4%
India	44.1	44.5	1.0%	47.2	6.1%
Germany	42.7	42.3	-1.0%	43.0	1.7%
Australia	37.5	34.3	-8.5%	35.0	2.0%
Mexico	19.1	20.2	5.8%	20.7	2.5%
France	19.1	17.6	-7.9%	17.8	1.1%

# International Visitors to Seattle

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Canada	1,605.0	1,674.3	4.3%	1,699.0	1.5%
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South Korea	64.3	64.7	0.6%	67.9	4.9%
United Kingdom	60.8	60.1	-1.2%	61.6	2.5%
Japan	45.8	47.4	3.5%	49.5	4.4%
India	44.1	44.5	1.0%	47.2	6.1%
Germany	42.7	42.3	-1.0%	43.0	1.7%
Australia	37.5	34.3	-8.5%	35.0	2.0%
Mexico	19.1	20.2	5.8%	20.7	2.5%
France	19.1	17.6	-7.9%	17.8	1.1%

# Lauren Whicker

Account Director  
– Australia  
*GTI Tourism*



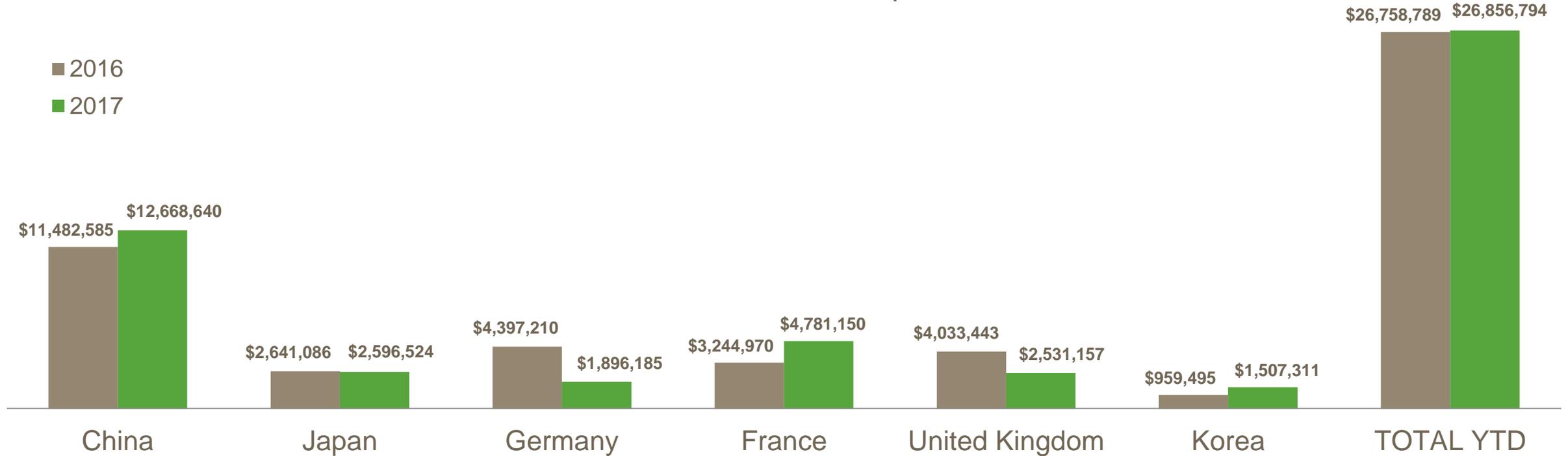
# Tourism Development: Inbound Travel



# Media Value Report

## 2016 VS. 2017 MEDIA VALUES

JANUARY – OCTOBER | USD



# Tourism Development: Outbound Travel



# International First Takes



# Leisure Campaign Overview

ALI DANIELS

STIA

# Where we started

## 2012 Advertising Review

### Key Message

Seattle is a unique art, music and culinary destination with a rich tapestry of experiences waiting for you this weekend.



- Gauguin
- Taste Washington
- James Beard award-winning chefs
- Nirvana at EMP
- Pike Place Market
- Symphony, Opera, Ballet

## 2012 Advertising Review

### Audience Identification

### The Sophisticated Traveler



- A35+
- Well educated
- Higher income
- Active online
- Very mobile
- Drive or Fly

## Where we started



DAYS IN  
**SEATTLE**

# Where we started

The screenshot displays the '2 Days in Seattle' website interface. At the top, there's a navigation bar with 'Explore Seattle', 'Meet the Curators', and 'VisitSeattle.org'. A search bar is present, and a 'Build Your Itinerary' button shows '0 Locations Added'. The main area features a map of Seattle with a popup for 'Matt's in the Market'. The popup includes a tweet from @Maurice: 'First taste during my #2DaysinSeattle: beautifully delicious pairings of eggs & seafood @mattsinthemarket http://t.co/xdNLqpk7' and a photo of the food. Below the map is a 'Find a Hotel' section with fields for 'Check-in Date', 'Check-out Date', and 'Adults' (set to 1). The bottom section is a grid of featured locations:

- James Beard Award Winning Chefs**: A featured image showing chefs in a kitchen.
- The Crumpet Shop**: A photo of a woman eating a crumpet. Description: '@joanneisafoodie: \*@hatpanda650: #2daysinseattle #crumpets @joanneisafoodie http://t.co/TKp2k2P4\* -- & lemon curd and ricotta ftw!! At the crumpet shop:-)'
- Molly Moon's Homemade Ice Cream Shop**: A photo of ice cream in a blue cup. Description: '@Maurice: Strange but delicious combo: balsamic strawberry & salted caramel @mollymoon's homemade ice cream! #2DaysinSeattle http://t.co/pREvucqe'
- Maximilien**: A text-based entry. Description: '@SeanaLyn: Waiter at Maximilien told us they were out of oysters then a few minutes later came back saying he went down to the market for more. Yay! #2daysinseattle'
- Matt's in the Market**: A photo of food. Description: '@Maurice: First taste during my #2DaysinSeattle: beautifully delicious pairings of eggs & seafood @mattsinthemkt http://t.co/xdNLqpk7'
- Seattle Ferry Terminal**: A text-based entry. Description: '@joyce: Being near water sparks surges of mental clarity for me. Just had a eureka moment for'
- Hyatt at Olive 8**: A photo of a hotel interior.

# Where we started



**201** BUMBERSHOOT BANDS  
**53** OUTDOOR CONCERTS  
**1** SWEET-SOUNDING TRIP

**2** DAYS IN SEATTLE  
What will you do with your 2?  
[2DaysInSeattle.com](http://2DaysInSeattle.com)



**39** ISLANDS TO EXPLORE  
**20** MINUTES OF UNFORGETTABLE VIEWS  
**1** PLACE WITH ENDLESS OPTIONS

**2** DAYS IN SEATTLE  
What will you do with your 2?  
[2DaysInSeattle.com](http://2DaysInSeattle.com)



**42** WATERFRONT RESTAURANT PATIOS  
**5** PLACES TO RENT YOUR RIDE  
**1** AQUATIC ADVENTURE

**2** DAYS IN SEATTLE  
What will you do with your 2?  
[2DaysInSeattle.com](http://2DaysInSeattle.com)

## Where we started



# Website Traffic – 2012 through 2017 YTD

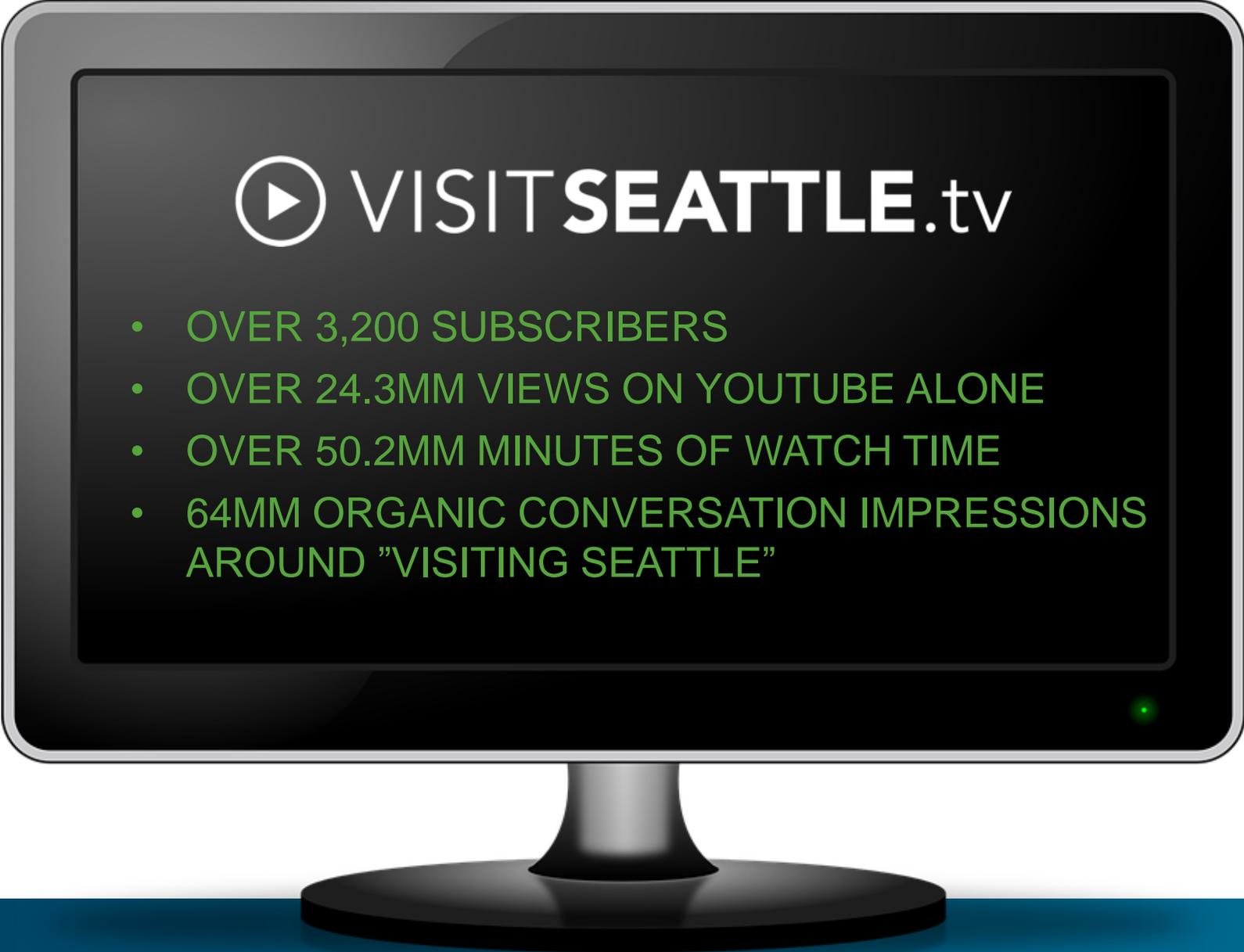


Where we are



STIA

# Video Analytics



▶ VISITSEATTLE.tv

- OVER 3,200 SUBSCRIBERS
- OVER 24.3MM VIEWS ON YOUTUBE ALONE
- OVER 50.2MM MINUTES OF WATCH TIME
- 64MM ORGANIC CONVERSATION IMPRESSIONS AROUND "VISITING SEATTLE"

Sizzle



STIA

# SundanceTV | Project Five x Five



STIA

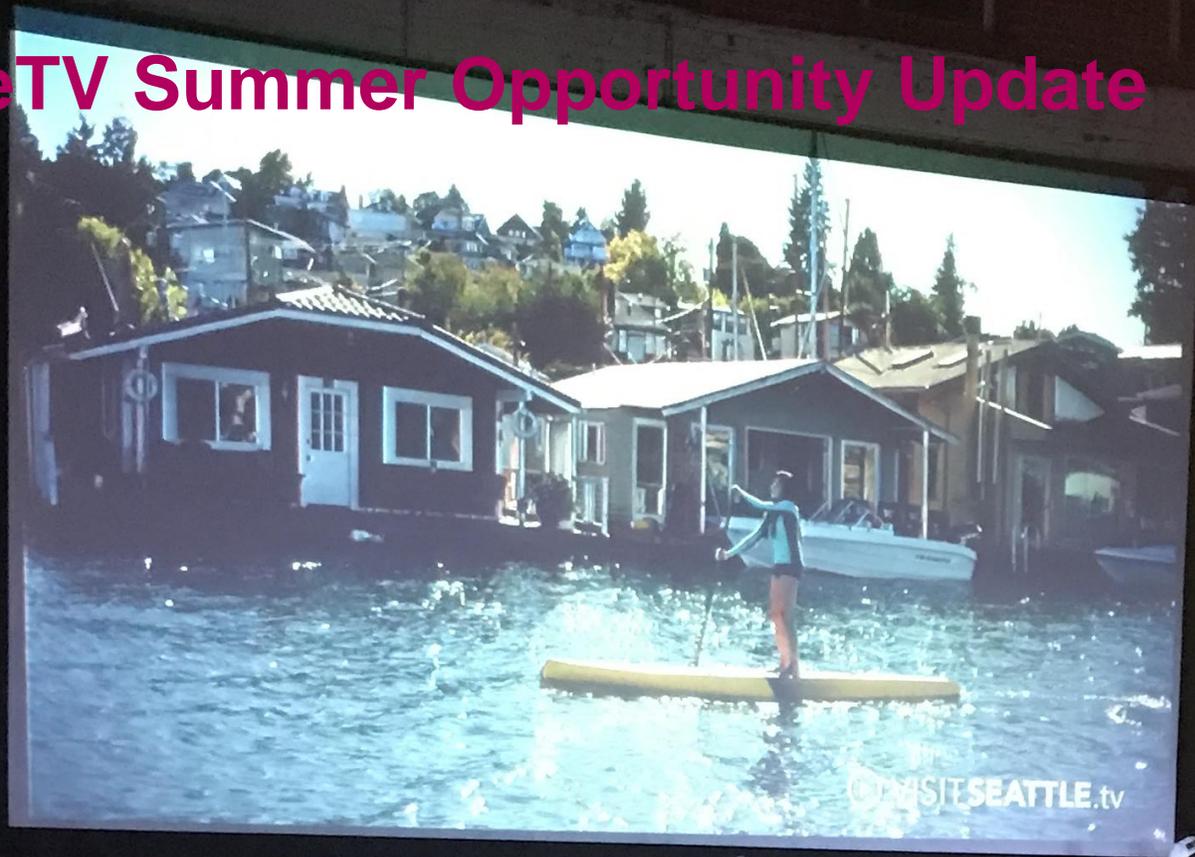
# SundanceTV | Project Five x Five



# SundanceTV | Project Five x Five



# SundanceTV Summer Opportunity Update



# CBS | The Emerald Race



STIA

CBS | The Emerald Race



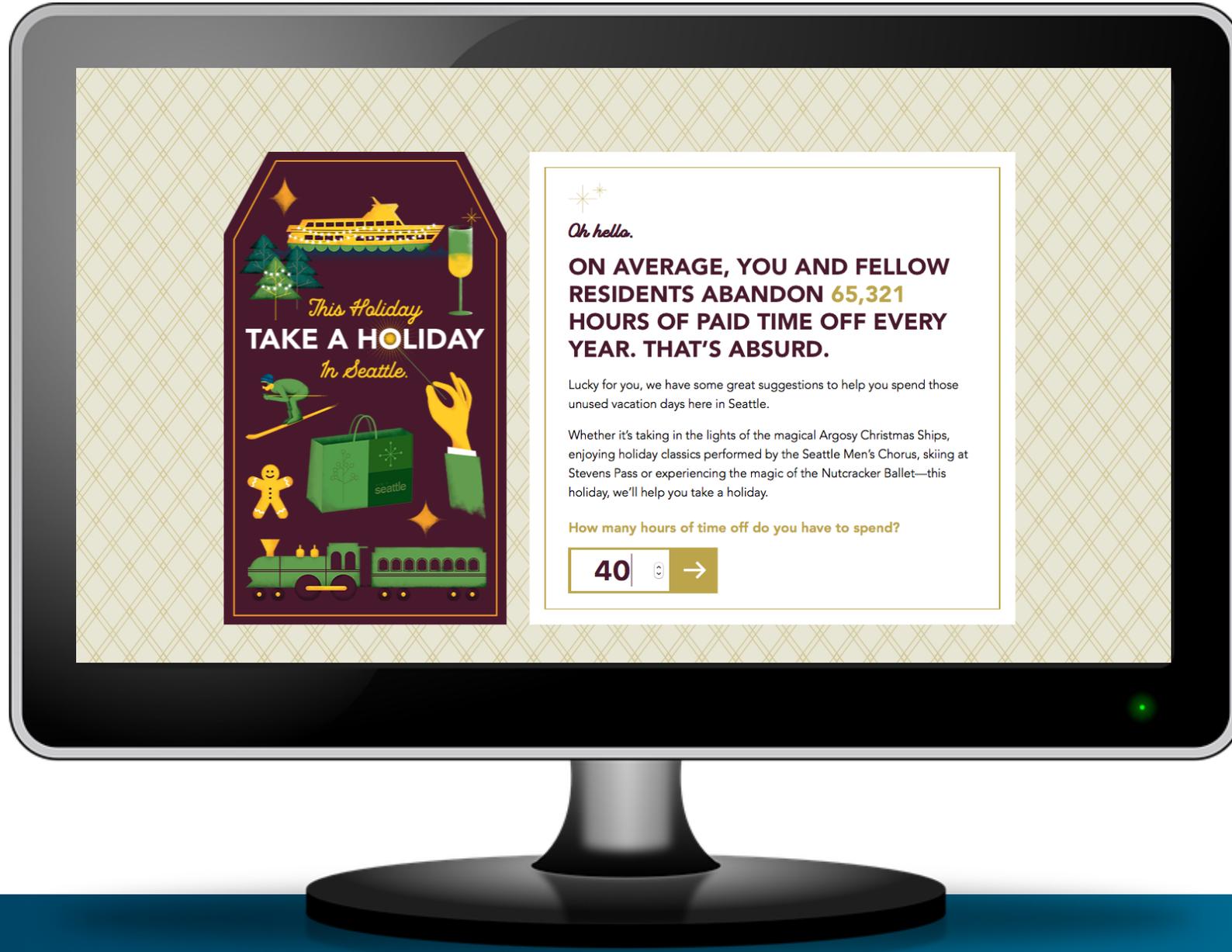
# RevoltTV | Turning Tables



# RevoltTV | Turning Tables



# Holidays



Oh hello.

**ON AVERAGE, YOU AND FELLOW RESIDENTS ABANDON 65,321 HOURS OF PAID TIME OFF EVERY YEAR. THAT'S ABSURD.**

Lucky for you, we have some great suggestions to help you spend those unused vacation days here in Seattle.

Whether it's taking in the lights of the magical Argosy Christmas Ships, enjoying holiday classics performed by the Seattle Men's Chorus, skiing at Stevens Pass or experiencing the magic of the Nutcracker Ballet—this holiday, we'll help you take a holiday.

How many hours of time off do you have to spend?

40 →

# Holidays



# Holidays



STIA

# Holidays



STIA

# Holidays



# Holidays

**PACIFIC PLACE**

**visit seattle** 2017 HOLIDAY GUIDE

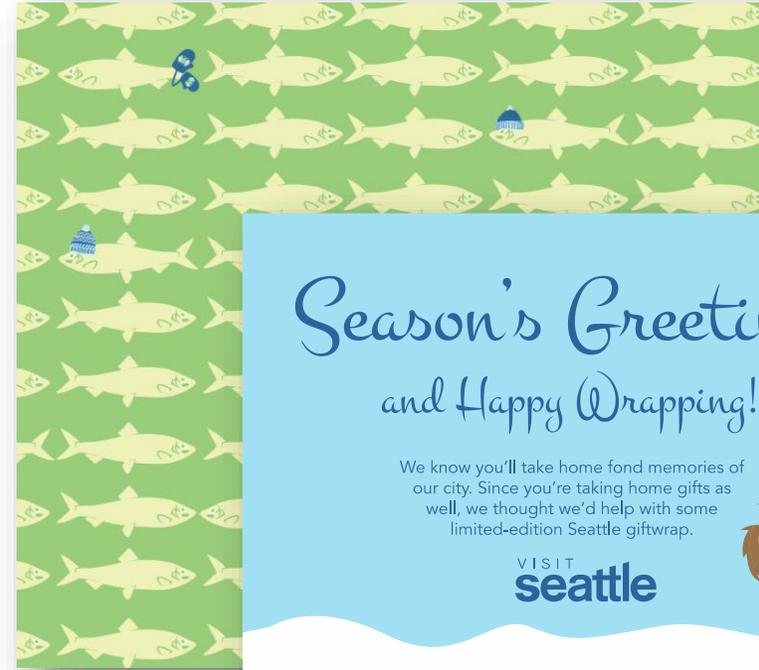
*This Holiday*  
**TAKE A HOLIDAY**  
*In Seattle.*

**Argosy Cruises**  
**Select Dates**

The Argosy Cruise is a ship-to-shore holiday tradition in Seattle, the Official of the city with hundreds of different Puget Sound waterfront communities to different Puget Sound waterfront communities – around 65 in all. Choirs on board the Christmas Ship™ perform to guests aboard as well as to those communities gathered on shore. Come experience the Christmas Ship and prepare for the holiday event of the season!

argosycruises.com

SEATTLE HOLIDAY GUIDE 2017



## Season's Greetings and Happy Wrapping!

We know you'll take home fond memories of our city. Since you're taking home gifts as well, we thought we'd help with some limited-edition Seattle giftwrap.

**visit seattle**



Shine A Light

**ALL PEOPLE WELCOME**

A photograph of two people standing on a balcony at night. The person on the right, wearing a light-colored hooded jacket, is lighting a candle held by the person on the left, who is wearing a dark jacket with white stripes on the sleeves. The background shows a city skyline with lights and a prominent tower. The text 'ALL PEOPLE WELCOME' is overlaid in large white letters across the center of the image.

# SEATTLE MUSEUM MONTH

Stay+Play

OUR REGION'S TOP MUSEUMS  
ARE HALF PRICE FOR GUESTS  
IN FEBRUARY.

Ask Hotel staff for details.  
[seattlemuseummonth.com](http://seattlemuseummonth.com)

STIA



# Stay

# +



# Play

Spaceflight Academy at  
the Museum of Flight



photos: Suzi Pratt Photography

# TASTE WASHINGTON

March 22-25, 2018

*Celebrating*  
♦ 21 YEARS ♦  
*of Washington wine*



**TICKETS  
ON SALE  
DECEMBER 1**

[tastewashington.org](http://tastewashington.org)



JUNE 1-3, 2018



PIONEER SQUARE • SEATTLE

THE FEST

THE SUMMIT

BUY PASSES

ABOUT

PARTNERS

UPSTREAM PRESENTS



JUNE 1-3, 2018

PIONEER SQUARE • SEATTLE

f FACEBOOK

🐦 TWITTER

📷 INSTAGRAM

Like 11K

Follow @UpstreamFest 4,175 followers

#seattleproud



# BUMBERSHOOT<sup>®</sup>

S E A T T L E



W A S H I N G T O N



# Public Relations

ALI DANIELS

STIA

# Media Missions



# YTD Coverage

Circulation Total: 448,223,788

Ad Value Total: \$8,866,202

Total Stories: 325

Living MARTHA STEWART

Fodor's Travel

JETSETTER<sup>®</sup>  
MAGAZINE  
EXOTIC PLACES • INTERESTING PEOPLE • INTELLIGENT TRAVEL

BuzzFeed

Forbes

travel  
CHANNEL

bravo *THE feast*

P O P S U G A R .

The Epoch Times  
A fresh look at our changing world

# Seattle Museum Month Coverage

Circulation Total: 333,906,102  
Ad Value Total: \$1,141,321  
Total Stories: 560



# Taste Washington Coverage

Circulation Total: 130,300,523  
Ad Value Total: \$1,279,509  
Total Stories: 63



# 2018 Workplan & Budget

TOM NORWALK | ALI DANIELS

# 2017/2018 DMO Comp Set Budget Comparison

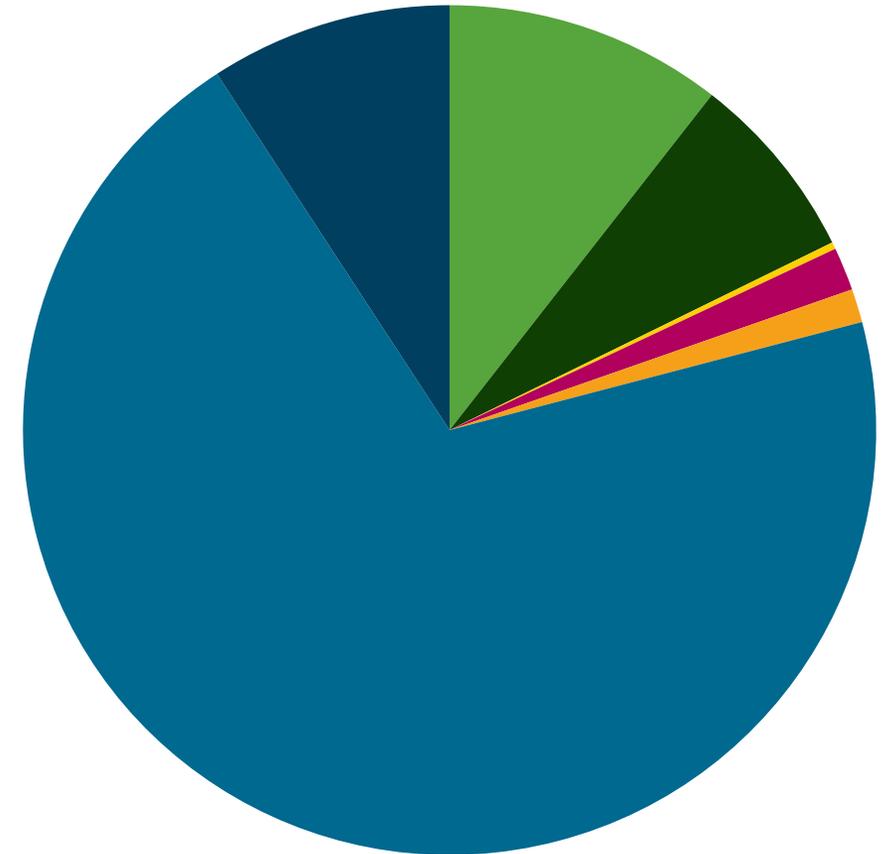
## DMO BUDGETS (IN MILLIONS)



# 2018 Budget

International FAMs, Site Inspections, Press Trips, Marketing Partnerships, Client Events & Missions	\$800,000
Special Events	\$545,000
Photography	\$20,000
Public Relations	\$125,000
Research	\$96,800
Advertising	\$5,306,614
Administrative Expenses	\$696,586

Total Expenses	\$7,590,000
Revenue	\$7,590,000
Fund Balance	\$2,214,702



## 2017 Forecast

Administrative Expenses	8%
Estimated \$656,500	
Marketing Expenses	92%
Advertising	
Public Relations	
Intl Fam, Site Inspect & Press Trips	
Intl Client Events & Sales Missions	
Intl Marketing Partnerships	
Special Events	
Photography & Videography	
Market Research	
Estimated \$7,411,478	

**Total Expenses** \$8,067,978

**Revenue** \$7,496,000

## 2018 Budget

Administrative Expenses	9%
Estimated \$696,586	
Marketing Expenses	91%
Advertising	
Public Relations	
Intl Fam, Site Inspect & Press Trips	
Intl Client Events & Sales Missions	
Intl Marketing Partnerships	
Special Events	
Photography & Videography	
Market Research	
Estimated \$6,893,414	

**Total Expenses** \$7,590,000

**Revenue** \$7,590,000

# 2018 Budget | Variances

**International | ↓ \$25,497**

Total 2018 spend: \$800,000 / 11% of Budget

**FAMS | (\$25,042)**

-Decrease of funding aligns with strategic shift to focus on proactive, instead of reactive, inbound FAM hosting

**CLIENT EVENTS AND MISSIONS | (\$25,455)**

-China Mission shifting to every other year format; no Mission in 2018

-Introduction of two new Missions – South Korea & Japan (March) and Australia (December)

-Client events at IPW, ITB, and opening of Flight of Dreams (Nagoya, Japan)

**MARKETING PARTNERSHIPS | + \$25,000**

-Retainer fees and monthly expenses: China, South Korea, Germany, and Australia/New Zealand

-Minimal travel trade marketing and promotions

-Emphasis on follow-up consumer campaign (i.e. First Takes International) and distribution

-Maintenance of VS branded international assets and business suite

# 2018 Budget | Variances

## Special Events | ↑\$110,000

Total 2018 spend \$545,000 | 7% of Budget

- Taste Washington \$125,000
- Clipper Round the World \$150,000
- Upstream \$190,000
- Rock 'n' Roll Marathon \$80,000

# 2018 Workplan & Budget

Discussion & Vote

AMANDA PARSONS | RENE NEIDHART

# Thank You

## 2017 Outgoing Advisory Board Members

TOM NORWALK | ALI DANIELS

# 2017

## Outgoing Advisory Board Members



**David Dolquist**  
Seattle Marriott Waterfront



**Ben Thiele**  
The Palladian Hotel

# New Board Officers

AMANDA PARSONS

# 2018

## Advisory Board Officers



**Amanda Parsons**

Chair | Thompson Seattle



**Bill Weise**

Vice-Chair | Silver Cloud Hotel  
– Seattle Stadium



**Richard Hill**

At-Large | W Hotel Seattle

# Upcoming Events

TOM NORWALK

VISIT SEATTLE'S

# holiday breakfast

presented by:  DELTA

WHEN

**Thursday, December 14**

**7:30-8:15 AM**

Registration & Networking

**8:15-9:30 AM**

Program & Entertainment

WHERE

**The Westin Seattle**

**1900 Fifth Avenue**

Seattle, Washington 98101

REGISTER

**\$60**

Individual

**\$800\***

**Reserved Table of 10**

\*Includes your company name on the table sign and recognition in the presentation

## Thank You to Our Sponsors

SIGNATURE SPONSORS

**SeattleMet**



EVENT SPONSORS

IRIS & PEONY

FLORAL AND HOME



**PSAV**

PROFESSIONAL SOCIETY OF AVIATION

**THE WESTIN**  
SEATTLE

#MySeattleFamily

VISIT  
**seattle**

visitseattle.org

# Thank You & Reception

TOM NORWALK

# VISIT seattle

THE OFFICIAL DESTINATION MARKETING ORGANIZATION

[visitseattle.org](http://visitseattle.org)

One Convention Place | 701 Pike Street, Suite 800 | Seattle, WA 98101  
(206) 461.5800 | fax (206) 461.5855



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