

Speaker # 3
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2018

Washington State Tourism Marketing Plan

Hello,

We are excited to supply the attached marketing plan for attracting domestic and international visitors to our wonderful state of Washington.

A great deal has been accomplished in just three short months. Thanks to the foresight of the Washington State Legislature and through close collaboration with statewide marketing organizations, tourism experts, and researchers, valuable insights have been uncovered to define a clear path for success going forward.

Marketing Washington State's beautiful, unique assets is a passion for all involved. The Department of Commerce has provided direction in addressing the needs of rural and underserved communities statewide. The Washington Tourism Alliance aims to provide every corner of the state with valuable resources to attract visitors. GreenRubino, formerly the state's marketing agency, can continue its passion for marketing all that Washington State has to offer.

This marketing plan serves as a roadmap for helping grow the tourism industry while igniting passion and pride in all Washingtonians.

Like us, we know that you have a passion for promoting all that Washington State has to offer. Collectively, we look forward to making this vision a reality.



Executive Summary

A plan for Washington State tourism marketing

Tourism is Washington's fourth largest industry. It provides more than 177,000 jobs, brings in more than \$21 billion to our economy annually, and returns \$2.50 to \$20 in tax revenue for every \$1 spent on tourism marketing.

Despite these economic benefits, since 2011 Washington State has not invested much to attract out-of-state and international tourists. In fact, we are the only state without state-funded tourism marketing. This means that for years, tourists have been siphoned off by other states that also offer many of Washington State's assets, such as great natural beauty, unique cultural opportunities, and world-class food and wine. As we lose market share, the rural areas, which often lack marketing resources, suffer the greatest impact.

The challenge is clear: unless we invest more in marketing our state, we will continue to lose visitors and their spending to other states.

Therein lies the impetus of this marketing plan. A product of foresight from the Washington State Legislature, this plan is the first step toward a long-term goal of sustained tourism funding based on a two-to-one match of industry

contributions to state contributions. An organized tourism marketing program is the most direct and fastest approach to see a return on investment in terms of visitor spending, additional state and local taxes, and job creation and career-connected pathways, especially in rural areas.

This plan outlines the research-driven goals, objectives, strategies, audiences, points of differentiation, channels, tactics, and budget allocations that will provide a high-level roadmap for implementation when the legislature approves funding and industry partners provide funds.

The Goals

The Washington Tourism Alliance (WTA), Washington State Department of Commerce (Commerce), and industry partners and stakeholders including the Washington State Destination Marketing Organization Association (WSDMO) guided this work. They outlined the goals of this marketing plan as:

- Attracting net new visitors from out of state and internationally
- Attracting more visitors to locations beyond urban gateways, particularly rural and tourism-dependent regions
- Highlighting the natural wonders and outdoor recreation opportunities of the state
- Supporting tourism-dependent industry partners through education, training, and co-op opportunities
- Offering communications assistance for tourism areas impacted by natural disasters

Research

Primary and secondary research conducted for this plan includes: a statewide ethnographic study, social listening, surveys and interviews with DMOs and industry stakeholders, survey of out-of-state travelers, analysis of competitive state marketing programs, and many international tourism studies.

Key findings from the research include:

- Top reasons to visit include natural beauty, accessibility of nature, and diversity of landscapes, followed by a vibrant food and beverage scene in every area of the state
- California ranks higher than Washington in terms of mindshare (interest and intent to visit)
- Awareness of specific regions drastically falls beyond Metro Seattle
- States further removed, such as Texas and Arizona, cannot readily distinguish us from other Northwestern states
- International travelers are drawn by urban amenities, but are also interested in national parks and outdoor recreation.

Audiences

To ensure resources aren't stretched too thin and that the highest-opportunity visitors are targeted, we recommend attracting visitors who are:

- Outdoor recreation seekers
- Foodies and wine drinkers
- Want an authentic NW experience
- Road-trippers

Strategic Differentiation Statement

As a result of the research, this plan recommends basing future marketing activities on a strategic differentiation statement (not a tagline). The most opportune position for the state to own is the duality inherent in the Washington State experience: we have adventures (natural wonders, outdoor recreation) and indulgences (wine, beer, coffee, spirits). That led us to:

*Adventures and indulgences.
It all comes naturally in
Washington State.*

Strategies and Tactics

The identified key strategies are based on data and will help the state achieve stated goals:

1. Promote the state itself through a state-level marketing campaign. Integral to this strategy is the inclusion of statewide assets, including rural and tourism-dependent areas, based on the duality of adventures and indulgences.
2. Develop a prioritized set of marketing tools for industry partners, including marketing and media cooperatives, training, research, events, and destination development opportunities.
3. Build an online resource for both the industry partner program as well as an inspiration and planning tool for potential visitors.
4. Create marketing programs designed for specific countries to attract international travelers and pull them out of the urban gateways to the rural and tourism-dependent areas of the state.
5. Small-scale destination development to help the state's contractor work with rural destinations to identify assets, evaluate potential, and prioritize projects.

Measurement

Success will be measured by visitor spending (in key tourism sectors of lodging, dining, transportation, and activities/attraction), domestic and international visitor volume, increases in mindshare (interest and intent to visit), additional state and local tax revenues, state and local lodging taxes, growth of employment/jobs, dollars generated via co-op opportunities, and website and social media analytics.

Budget

As there is currently no state-supported tourism marketing effort, we recommend this plan be implemented over a five-year period. That will allow the state contractor selected to execute the state tourism marketing plan to first establish the foundation, then build upon it as resources and funding becomes available.

*The recommended allocation of those funds is as follows:

Tactic	First 12 months	Years 2-5
Research	2%	2%
Events	3%	5%
Training	2%	4%
PR (earned media)	12%	8%
Creative, asset, content development	27%	10%
Paid advertising media (print, digital, outdoor, etc)	28%	45%
Website (industry, consumer)	8%	2%
Partnerships/programming	1%	4%
Social media	3%	2%
Travel trade	7%	11%
Administration	7%	7%
Total	100%	100%

*Budget allocations are contingent on final legislative action and subject to change.

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Introduction

This report is the result of initial funding by the State of Washington, with the charter to prepare a plan that the state's contractor could use as a blueprint for attracting new visitors from outside the state. A three month effort, it included an extensive set of research inputs, a substantial analysis process and the creation of marketing recommendations to increase visitors and tourism revenue. Throughout the process, we worked very closely with Washington Tourism Alliance (WTA) and the Department of Commerce, and sought suggestions from the Washington State Destination Marketing Organization (WSDMO). Collectively, we would like to thank the Washington State Legislature for its foresight and funding.

- Tourism is Washington's fourth-largest industry.
- It brings in more than \$21 billion to our economy annually.
- It provides more than 177,000 jobs (in 2016).
- Each year, the tourism industry saves \$650 in tax dollars per household.
- The tourism industry weathers economic recessions better than most.
- Tourism is a diverse employer, providing jobs at varying levels (entry, vocational, career) and also facilitates career-connected pathways, which is essential to our youth and future of our state.
- The ROI for local and state taxes ranges from \$2.50 to \$20 per dollar spent on tourism marketing.(1)
- Visitor spending per marketing dollar can be anywhere from \$48 to \$305.(2)

Despite these statistics, since 2011, Washington State has not invested much in attracting out-of-state and international tourists, though DMOs have done a great job attracting in-state visitation. We are currently the only state without a state-funded tourism office, and prior to 2011, Washington State ranked only 48th in tourism funding. This means that for years, tourists have been siphoned off by other states that also offer many of our assets, like great natural beauty, unique cultural opportunities and world-class food and wine. Oregon spends \$32 million a year on tourism marketing, with half the population as Washington. California spends \$120 million. And even sparsely populated Montana outspends us, with an annual tourism budget of \$19 million. (See appendix on page 52)

The challenge is clear; unless we invest more in telling people about our state, we will continue to lose visitors and their spending to other states. And as we lose market share, the rural areas which often lack marketing resources suffer the greatest impact.

The many destination marketing organizations (DMOs) and tourism-related associations in the state (hereafter called "industry partners") have been doing a great job of attracting in-state tourists; Seattle and the Port of Seattle also have well-developed international and national marketing efforts. But what's been missing is a statewide effort that does what the individual industry partners can't, for reasons of scale, resources or expertise. These activities include national or out-of-state advertising, big research projects, targeting the travel trade and attracting people to the rural areas outside of the Seattle and Spokane gateways.

Ultimately, we need to make sure that the great State of Washington stays top of mind when our target visitors start to dream about their next vacation.

This plan is just a first step in a long path toward those goals—both a funding journey and a marketing journey. Additional steps include, perhaps, branding the state, creating a marketing campaign, creating a more detailed media and work plan, and building the funding platform for the implementation of this plan through industry partner funds and state matching funds. But it provides a roadmap that the state's contractor can use to make decisions about funding, and once those decisions are made, implement the right strategies and tactics to attain our rightful place as the state that has it all, and that tops everyone's list of places to visit. We believe those worthy goals are worth investing in.

The Goals

Our goals, the big-picture achievements we are trying to accomplish, have been outlined by the Washington State Tourism Marketing Committee, composed of members of the WTA, state DMOs, the Washington State Department of Commerce, the WSDMO and other interested stakeholders. They are:

- Attracting net new visitors from out of state and internationally
- Attracting more visitors to locations beyond the urban gateways, particularly rural and tourism-dependent regions
- Highlighting the natural wonders and outdoor recreation opportunities of the state
- Supporting tourism-dependent industry partners
- Offering communications assistance for tourism areas adversely impacted by natural disasters

The Objectives

The objectives, the measurable steps to achieve the goals, are:

- To generate an attractive program for industry partners to participate in (including education and training resources), meeting the dual goals of (1) marketing the state in an efficient manner and (2) generating a tourism funding pool through a state 1:2 match of industry partner dollars
- To drive more people through the airport gateways who then go on to visit the rest of the state for outdoor recreation or food and beverage opportunities

The Key Performance Indicators (KPIs)

While specific KPIs, the specific points of progress we measure to make sure the objectives are achieved, will be determined by the individual tactics this plan recommends, ideally the state's contractor would measure:

- Mindshare, a benchmark wherein our target visitors to tell us how much they know and think about Washington State in comparison with our peer regions. Are we in their consideration set?
- Dollars generated via co-op opportunity participation by the region's industry partners and Chambers of Commerce, the Port of Seattle and statewide associations such as the Washington State Wine Commission and the Washington Hospitality Association
- Visitor-related spending
- Domestic and international visitor volume
- Specific web metrics for ExperienceWA.com (or whatever the new web property for state tourism will be called), click-through rates, ad impressions and media coverage
- State and local tax revenues
- State and local lodging revenues
- Growth of tourism-related jobs/employment

Research Highlights

As part of this plan, a wide set of research efforts were conducted and/or reviewed. Many state DMOs and other tourist organizations shared their research. Publicly available research from competitive states was also reviewed. In addition, the 2000–2016 Dean Runyan data, which provide much of the baseline information for tourism behavior, were reviewed. Reports from Destination Analysts, Visit Seattle and Brand USA were used to determine the international strategies.

The primary research conducted as part of this plan included the following:

- A state-wide ethnographic study, where a photographer/analyst traversed the state to find unique stories, people and places to guide the personas and brand differentiation efforts. See the report in Appendix A.
- A social listening project that reviewed one year of international and US-based posts about plans to travel to Washington State
- Surveys and interviews with 20 DMOs and 20 additional stakeholders to identify assets, goals, audiences and strategies
- Quantitative research conducted with 1,400 potential travelers from target states
- An analysis of marketing efforts from peer states and provinces (California, Oregon, Colorado, Montana, British Columbia and Arizona), resulting white-space maps
- A review of peer states' co-op marketing efforts and media spending
- A review of existing industry partners' research
- International research provided by Destination Analysts, Brand USA, and Visit Seattle

The findings from this research are manifested in the recommendations of this plan.

The following two pages outline the highlights.

Washington State Assets

No surprises here: Washington State is a land of beauty, with mountains, water, islands, beaches, desert and more. Our natural beauty, the accessibility of nature and the diversity of landscapes topped the list of reasons to visit. A corollary to our natural beauty is the amount and types of outdoor recreation we offer, from skiing, hiking, boating and fishing to kite surfing, motocross, climbing and more. According to the quantitative research, the volcanoes, islands, peninsulas and coast are the key untapped areas that are most likely to draw in visitors.

Close on the heels of our natural beauty was our vibrant food and beverage scene, starting with wine and followed closely by beer, spirits, food and coffee. It's a place where we do hard things well, and connoisseurs are starting to notice. And almost every area of the state surveyed pointed to its specific food and alcohol assets.

We also have some unique opportunities not found elsewhere. Besides all that Seattle offers (we can't ignore that Seattle is the main gateway to the state, and that many people start there), we have the largest ferry fleet in the United States, more Native American tribes than practically anywhere and unique pockets of history and culture throughout the state. Our culture of entrepreneurialism, creativity and innovation is also a draw, as evidenced by the talent and iconic brands that call Washington home: Boeing and Microsoft, Jimi Hendrix and Nirvana, the Seahawks and Starbucks, the Gates Foundation and Fred Hutchinson. This too distinguishes us from competitive states.

One more asset is our unaltered awareness: In terms of mindshare, Washington State is second only to California among peer states.

The overall takeaway is variety: a state of many entertainments, activities, landscapes and cultures.

International Research Results

Overall insights from our social listening project include the following:

- People coming from abroad are more drawn by urban amenities, and often go to other cities on the West Coast (Portland, Vancouver, Los Angeles).
- Many are here on business and add leisure to their trip.
- Besides Canada, other countries aren't into outdoor recreation as much, although photography of scenery is high on their lists.
- According to social media listening, Australia is a good target for encouraging travel to Washington State.

Overall insights from our review of research done by Brand USA, the Port of Seattle and Visit Seattle are as follows:

- **Canada:** Treat this like a drive market. Canadians are interested in events and road trips over a shorter period and on smaller budgets.
- **Australia:** Australians are more likely to come to Seattle than visitors from Germany and the UK. They also spend more and stay longer, spending several days in multiple cities.
- **Germany:** While Germans tend to take longer trips to the United States, they spend less money than those from some of the other markets. Their interest in Seattle seems to be the least among the preferred markets, but their travel patterns suggest that they would be open to taking in diverse scenery/road trips to other parts of the state.

International Research Results cont.

- **China:** Those from Asian countries are more likely to use video content to inform their decisions. Chinese visitors in particular seem to be looking for recommendations and input about destinations, lodging and attractions from trusted or perceived expert opinions. Chinese response demonstrated a travel pattern of jam-packing a short trip with lots of experiences.
- **Digital research sources**—search, friends, online travel agents, online content and travel agent/operator websites—seem relatively consistent across the board. Traditional resources seem to vary by market.

Washington State Tourism Challenges

Not surprisingly, the biggest challenge to attracting more tourism to Washington State was the historic lack of investment in marketing by the state, an issue the WTA is working to rectify. This was manifested in people outside of our state not being aware of opportunities beyond the Puget Sound region. Stakeholders and likely travelers also identified our rainy climate and the time and expense to get here as secondary challenges. The quantitative survey said that affordability and urban headaches (traffic, crime, congestion) were major barriers to attracting tourists.

Some stakeholders fear that driving more tourists to our already heavily toured areas will cause them to be loved to death. They cited the need to drive people during less traveled seasons and to less traveled areas, and to target those who support sustainable travel.

In the quantitative research, California beats out Washington in terms of intent to visit (but we beat out the rest of the Western states). While nearby states and provinces are well aware of our assets and know what makes us different, states further removed, such as Texas and Arizona, cannot readily distinguish us from other Northwestern states. In addition, British Columbia and Oregon have the highest intent to visit us, so they are our lowest-hanging fruit when targeting prospects.

Audiences

Washington State Tourism Targets

Any marketing plan must outline its prioritized markets and audiences, to ensure that resources aren't stretched too thin and that the highest-opportunity visitors are targeted. To define these targets, we created seven data-driven personas and used these personas to chart the travel planning process via customer journey mapping. Many of our recommendations are a result of these personas and how they make decisions about where to visit.

Psychographics

The following four psychographic segments informed our seven personas:

Outdoor recreation seekers

This is a key tourism asset for many of our state's rural areas and economies, and drives visitors to some of our lesser-visited regions.

Foodies and wine enthusiasts

We offer food, drinks and spirits of great quality and variety, and are becoming known internationally for our wines' quality.

Want an authentic NW experience

These people are familiar with the types of experiences that are found throughout the Northwest, and it's the type of experience they're interested in.

Road-trippers

These are people who like to peregrinate and for whom the journey is as important as the destination.

States

We looked at historic feeder states to find the most like-minded people who are interested in our particular assets. From our analysis, we selected the following states as targets for interstate tourism: Arizona, California, Colorado, Oregon, and Texas.

While in-state tourism is not a focus of this plan, ethnographic research indicated that driving tourism to some parts of the state will be easier to do by targeting Puget Sound residents, rather than expecting people coming from further away to explore lesser-known regions. We recommend encouraging Seattleites (particularly our large number of new residents) to explore the further reaches of their state.

Countries for international targeting

Based on our research, we identified the following countries to target:

The UK

This country has historically been a big source of travelers to Washington, and the similarity of climate and language makes visitors feel welcomed. These are typically people interested in Seattle, but who are willing to spend more time and see a wider portion of the state. This group is particularly interested in our indigenous cultures.

Australia

We picked this country as a target because visitors from there stay a long time, spend a lot of money and are interested in outdoor recreation.

Canada, particularly BC

According to our social listening, visitors from BC are particularly interested in outdoor recreation and our natural beauty, and it's easy to get here.

China

This country has the largest long-term upside, and it includes people who love to visit national parks. It requires specific infrastructure to service. For example, people visiting from China like to have Asian breakfast items and often need more translation support.

German

This has been a historically strong-performing country for our state, and it produces people who enjoy outdoor recreation.

Personas and Journey Maps

The research led us to create data-driven personas. These are segments, distilled down to a person (or couple, or family), who will:

- Be the type of people to go beyond Seattle to explore other parts of the state
- Be the type of people who want what we have, that is, appreciate our unique assets
- Have enough money to spend to drive economic activity

These personas are based on the research and are psychographic-, behavior- and interest-related, not necessarily origin-related. That means that some personas will be applicable to additional countries or states.

The personas are used to generate customer journey maps, which identify relevant opportunities, channels and tactics for intersecting with the target.

Based on these personas, we generated customer journey maps to identify relevant opportunities and natural points of intersection for each audience. These maps inform the actual channels and tactics that follow.



Amanda

Outdoor recreation, nature-lovin' road tripper

“ Coming from BC, I thought we had the corner on natural beauty, but Washington offers incredible lakes, rivers and mountains, and every region is full of incredible diversity. And the adventures are everywhere! In the two weeks I spent in the state, I kite-surfed in the Gorge, rafted the Wenatchan, hiked Hurricane Ridge and Mt. Baker and took a ferry to Stehekin.”

How she views the world

Amanda is all about nature and adventure. She is athletic, healthy and open to new experiences.

She has a boyfriend, but is also willing to travel by herself, with her sister or with a girlfriend. She likes to take longer trips, without a firm itinerary, letting serendipity guide her to find new experiences.

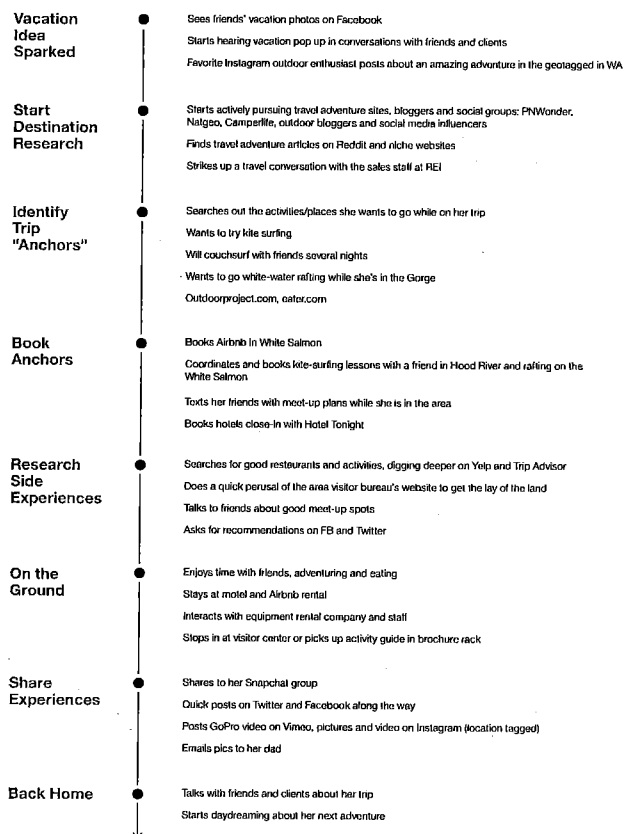
She has college friends who have moved to Seattle to work at Amazon and Microsoft. They, like her, are outdoor enthusiasts and spend their weekends hiking and posting their adventures to Instagram. From her exposure to their social media posts, she has a picture in her mind of trails, mountains and lakes she wants to experience herself. She expects to spend her time outside exploring the mountains and rivers of Washington. She also wants to check out the Seattle restaurant and bar scene before driving home. She shops at REI, drinks in moderation and gets most of her meals from grocery stores and small non-chain restaurants.

Occupation	Climbing instructor
Hometown	Squamish, BC (could represent OR, CO markets)
Experience goal	Have adventures that give her bragging rights around beauty and adventure. See new scenery, without going too far from home. Try new activities, off the beaten path.
Demographics	Age 28, has a BA in poli-sci, unmarried

How she plans her vacations

While she's not wealthy, she loves to travel and is always planning her next road trip, be it Glacier, Banff or Washington State. She stays in campgrounds or at friend's houses, uses Airbnb and couchsurf.com, and punctuates her lodgings with an occasional splurge on a motel. She plans the motel nights as anchors for her itinerary, leaving the space between showers for exploration. She uses Instagram to identify where she'd like to go and post a record of her adventures. She has an extensive network of climbing buddies, and asks her network (via Facebook) for recommendations of where to go and what to see (and maybe get an offer for a place to stay!). She follows several outdoor adventure bloggers and would like to be one herself.

Amanda's Customer Journey





“Coming off a great experience in Napa Valley last fall, we’re excited to explore Washington’s wine country—we’ve heard it rivals anything we had in California, and it has some great restaurants! It’s also nice to get away from the heat of a Texas summer.”

How they view the world

Jorge and Celia are determined to enjoy their freedom, now that they’ve sold their small construction firm and the kids are out of college. They want to make the most of their healthy years in retirement by traveling both domestically and internationally. They have made it a personal challenge to learn more about wine, and love to find really great restaurants along the way. They are comfortable renting a car and taking to the road, staying in hotels or B&Bs. They love finding cute small towns with artsy shopping opportunities, and that not-well-known winery with surprisingly great red blends. They are very outgoing, often making new friends when they travel.

Jorge & Celia

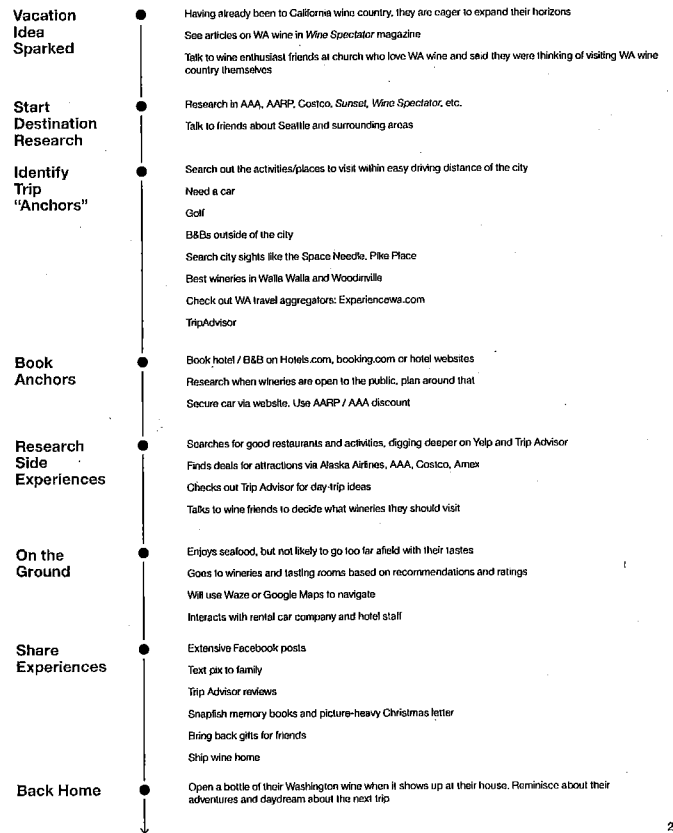
Early-retirement foodies and winies

Occupation	Retired business owners
Hometown	Austin, TX (could represent Arizona market as well)
Experience goal	Enjoy the good life, now that their kids are gone and the business is sold
Demographics	Hispanic, married, ages 61 and 65, met in college, two kids, ages 25 and 29

How they plan their vacations

Celia does most of the trip planning, starting with the destination. She starts with the region they want to visit, and looks for deals on hotel rooms and B&Bs. Once she’s got those dates, she starts Googling, asking for recommendations on Facebook, reading *Sunset Magazine* and looking at destination web sites to research the area. Once she picks an area, her husband researches wineries and restaurants in the region they plan to explore. They like to stay in Marriott hotels, but will book a Hyatt, Red Lion or Hilton, something familiar where they know they’ll be comfortable and perhaps use their loyalty card. In smaller towns without large hotels, they like to stay in B&Bs. They use TripAdvisor to find places to stay and activities, such as museums like Maryhill; they use Yelp to find good restaurants. While money is not a big concern, they are excited about deals and use AARP and AAA discounts when they can. Their plan is to fly into Sea-Tac, drive through Woodinville, Yakima, and the Tri-Cities and on to Walla Walla, then through to Spokane in time to catch their flight home!

Jorge & Celia’s Customer Journey





Ian

The authenticity seeker

“ I love to travel, particularly to small towns with lots of history and unique cultures, where I can learn and try new things. My daughter wanted to make sure we hit up Forks, because she's a big Twilight fan, and she wanted a visit to a water park. I had hiking, checking out the Makah tribal center, visiting all the museums in Tacoma and hitting up the hot springs in Sol Duc on my must-do list. We got it all done, and then some!”

How he views the world

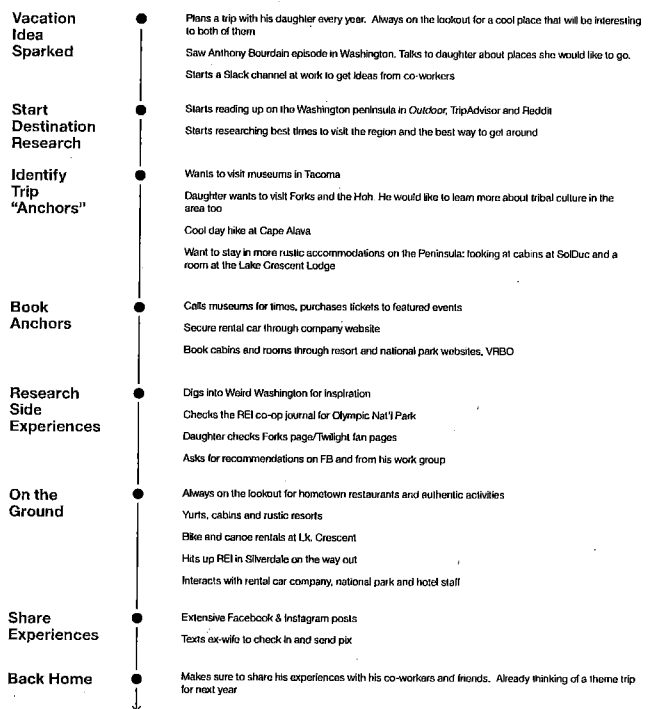
Ian uses travel to both satisfy his intellectual curiosity and provide him with fun time with his daughter, who he has custody of only during the summers. He is active, interested in history, art and music, and open to new experiences. He tends to avoid “chain” anything, preferring experiences that are unique to an area. He reads a lot of non-fiction, and has memberships at art museums. He loves finding weird, out-the-norm experiences and sights, and chronicles his finds on Facebook. He is active politically in progressive causes, as well as active in professional development organizations in Silicon Valley. He is always trying to optimize his life and satisfaction.

Occupation	Software engineering management
Hometown	Mountain View, CA
Experience goal	Find hidden gems and fun activities that stimulate his intellect
Demographics	Divorced, MS degree, age 51, 16-year-old daughter

How he plans his vacations

He works long hours at his job at Apple, so he wants his vacation time to be both relaxing and stimulating. He is not interested in luxury, being pampered, or over-touristed areas. He also has to find activities that will interest both him and a 16-year-old. He Googles phrases like “off the beaten path” and “local hidden gems” and uses TripAdvisor, Facebook recommendations and his peer group for ideas. He's a planner, but also builds in rest and relaxation time between activities such as hiking or biking. His daughter likes to do active stuff, as well. He uses Airbnb and HomeAway to find unique places to stay. He loves road trips because they give him time to talk to his daughter in an unstructured way, and he loves the serendipity of finding new, interesting places along the way. He eats at local, non-chain restaurants, and often plans his trips around themes, such as waterfalls, weird tourist traps or hot springs.

Ian's Customer Journey





Jie & Bin National park collectors

“Beijing is so crowded and smoggy, so we’re looking forward to visiting Washington’s national parks and taking advantage of all the fresh air and big scenery. My friends at Microsoft have made many suggestions, and we will try to do as many as possible in the short time we have.”

How they view the world

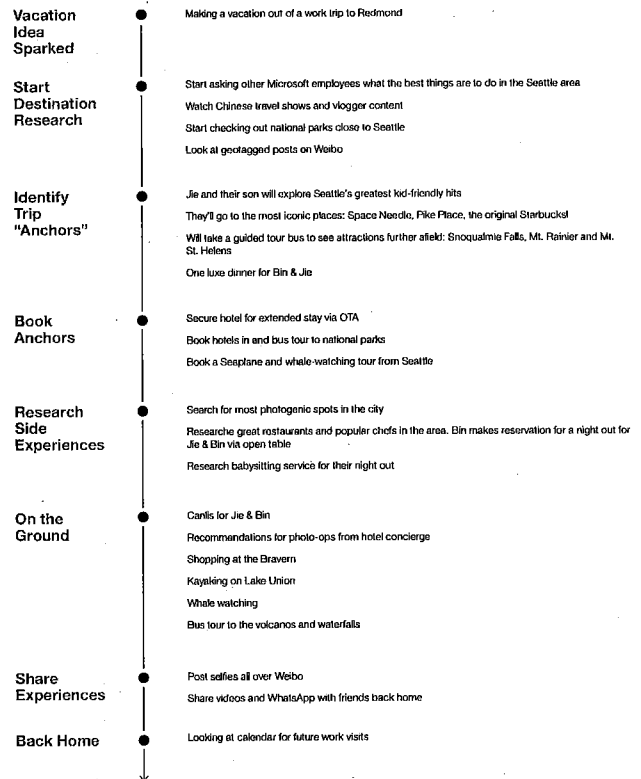
Bin is a well-educated researcher who is on his first trip to the US, visiting Microsoft headquarters on business. He’s using the opportunity to bring his wife and son along, and adding some time to their trip to sightsee, both in Seattle and beyond. Bin is a photographer and loves to blog about their travels. They want to see the best scenery Washington State has to offer and visit the iconic sites. Bin will use the opportunity to post photos and short blogs to his Weibo account, letting friends back home vicariously enjoy his trip. Their 10-year-old son is excited about seeing volcanoes and some wildlife on their trip, as well—maybe a bear or at least some elk.

Occupation	AI researcher, homemaker
Hometown	Beijing (could represent Korea or other long-haul Asian “disleisure” traveler)
Experience goal	See great scenery, wide open spaces and impressive national parks
Demographics	Married, aged 41 and 43, one boy, age 10

How they plan their vacations

When Jie realized they could come along on Bin’s business trip to Redmond, she quickly jumped on vacation vloggers’ websites to see where influencers recommended she visit. Besides quick trips to the Space Needle and Pike Place Market while Bin is at a conference at Microsoft, they want to get out in nature. Learning that the US has amazing national parks, and knowing something about the Mt. St. Helens’ eruption, she wants to make sure they visit both Mt. Rainier and Mt. St. Helens in the extra week they have available, so she looks for guided bus tours. She also wants to take a ferry somewhere, so plans two days in the San Juan Islands as well. She asks colleagues at Microsoft for recommendations of where to go, where to stay and what to see. While some tell her she is packing the trip too lightly, she is anxious to see as many beautiful places as possible, as quickly as possible. She books her trip via Expedia, finding a car, hotels on San Juan Island and places to stay near the volcanoes. Her son is particularly interested in seeing whales on their trip to San Juan Island, and she uses the destination marketing website to book their whale-watching trip.

Jie & Bin’s Customer Journey





Travis & Nicole

See-and-do-it-allers, leisurely

“ We’re amazed at how big the US is, and how diverse. California was fun, but we’re really enjoying the PNW, with its natural beauty and friendly people. We drove up the coast of Oregon, into Washington State, and found the two coasts really different. Bellingham and the Skagit Valley were really pretty, as well. And Seattle was everything we hoped for, but frankly, we were excited to get out of the traffic and the city to explore nature.”

How they view the world

Travis and Nicole are excited about their four-week trip on the West Coast of the US. They have a lot of vacation time from their jobs, and they want to experience California, Oregon and Washington as a local would, while also seeing the key attractions along the way. They aren't fancy people and are equally happy in a youth hostel, Airbnb, or camping. While they are covering a lot of miles on their trip, they plan to spend three or four days in each location, really getting to know them. They're particularly excited about Washington because they've heard good buzz about Seattle and are looking forward to craft beers, ciders and legal cannabis. They also want to see rivers, mountains and the beach! They like to spend time outside, and explore the history and culture of a region. They like music, hiking, biking and meeting new people. They'd also like to take in an American soccer game.

Occupation	High school teacher, self-employed graphic designer
Hometown	Outside of Sydney, Australia (could represent Germany market)
Experience goal	Experience a region in a leisurely manner
Demographics	Married, ages 34 and 36, met through an online dating service, no kids

How they plan their vacations

Members of the American Youth Hostel Association, Travis and Nicole start by mapping out hostels they'd like to stay in, from SF through Ashland and Portland, and into Seattle. Nicole has heard about the yurts you can rent in state parks, so she books a couple of those on the coast of Oregon and Washington from the state parks reservation systems. Once she has her anchor nights in place, she asks family and friends who have visited before to give them ideas of things to see and places to go. She Googles "things to do on the Washington coast" and finds Long Beach, which looks good for a couple of days at the ocean. She's also discovered that Olympia has a great indie music scene, so she plans a night there before three days in Seattle, then on to the Skagit Valley, Bellingham, Mt. Baker and the North Cascades. They end their trip with some "agritourism" on the east side of the state, staying on an apple farm near Yakima to round out the last part of their trip.

Travis & Nicole's Customer Journey

Vacation Idea Sparked

They've been talking about a West Coast tour for years

Start Destination Research

They have been researching stops all along the coast via TripAdvisor and googled posts on FB and IG

They talked to friends who had been to WA before

Get tips from fellow travelers on where to go in WA

Check out state park sites and top-10 lists to see what kind of experiences are along their basic route

Identify Trip "Anchors"

Travel up the coast from OR, stop at Long Beach

Camping and yurts in state parks, hostels and motels in town

Drive through North Cascades

Orchard in Yakima

Book Anchors

Stay in Long Beach booked via OTA

Book agritour in Yakima via website

Book youth hostels in Seattle and Bham via AYHA

Reserve rental car in CA

Research Side Experiences

Search for music events or scenes in Olympia

Pin beer tours or interesting microbreweries/microdistilleries around Seattle and north to Bham

Note highly rated pot shops in Seattle for consideration

Yelp for local neighborhood fare

Look on Groupon for local deals

Check the Sounders schedule

On the Ground

Lots of driving with small-town pit stops

Stumble into great music

Eat at ethnic and hole-in-the-wall restaurants

Enjoy the kitschiness of beach towns and small town charm east of the mountains. Find the REAL they were looking for

Blown away by the N. Cascades highway

Catch a Sounders game.

Share Experiences

Post on Facebook and Instagram

Snapchat with friends

Short videos of their adventures and music posted on FB/IG and Youtube

Travis posts on his travel blog

Back Home

Looking at calendar for future work visits



Trevor & Claude

Urban-to-rural curators

“No language barrier, weather like we’ve used to, big city fun and natural beauty—what’s not to like about Washington State? We’ll spend a few days seeing the sights of Seattle, then rent a car and head out to see some of the beauty we’ve heard so much about.”

Occupation	Barender, data analyst
Hometown	Shoreditch neighborhood of London
Experience goal	Have fun, eat well, see a lot, be welcomed and safe
Demographics	Ages 29 and 34, met at a bar, no kids

How they view the world

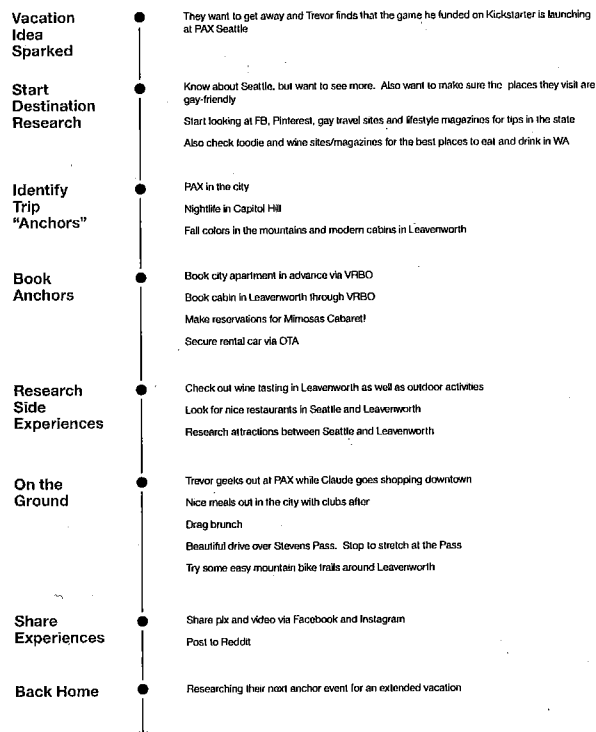
Trevor and Claude are a bi-racial gay couple that like the good life. Just a little too old for the bar scene, they still like to drink, listen to live music and explore cultures and history. They like good food, and while they are not wealthy, they are planning to splurge a bit on their planned vacation to the Pacific Northwest. Claude is a big fan of cos-play and anime, so they are hitting up ComicCon. They like cities and nature, and would love a vacation that includes both. Because they read a lot about gun violence in the US, and the fact that they are a gay, biracial couple, they plan to stick to the more progressive areas during their visit. A little cannabis tourism also sounds like fun.

How they plan their vacations

Trevor is the planner of the couple, and he’s spent some time on gay travel sites to find welcoming and progressive places to visit. They have a wide set of friends who have traveled extensively, and they get pointers from them. They know for sure they want to visit all that Seattle offers, and then branch out, and have tentatively identified Leavenworth (it’s kitschy!) and Winthrop (cowboys!) as additional places to visit.

He visits Travel Out Seattle, asks friends on Facebook and at parties about where to go, and Google’s best places to eat in Seattle. They like to stay in modern hotels or resorts. They plan to rent a car and head on to the Methow Valley. Yelp, TripAdvisor and gay-focused websites help them curate their trip. A horseback riding excursion and a mountain bike trip down a mountain are two activities that sound good.

Trevor & Claude’s Customer Journey





Aaron The Out-of-State Outdoorsman

“As an outdoorsman, living in Eastern Oregon I enjoy heading up to Washington, I can fish on the Columbia during the day and visit world-class wineries in the evening. And it's so easy to get the licenses I need.”

Occupation	Small business owner, HVAC
Hometown	Hermiston, OR
Experience goal	Explore new hunting and fishing grounds
Demographics	Age 38, married with two kids

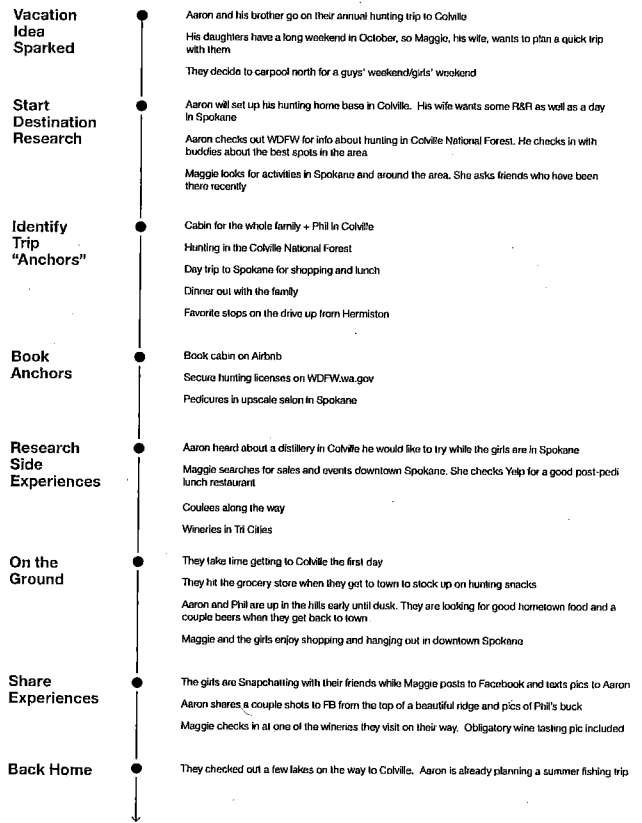
How he views the world

Aaron has lived in Eastern Oregon his whole life, he loves its open spaces and distance from the grind of big cities like Portland, Seattle and Boise. Some of his favorite memories from childhood are of hunting and fishing trips with his dad, and he likes to carry the tradition on with his wife and two daughters. Every fall Aaron and his brother, Phil, hunt white-tailed deer. Every summer his wife and two daughters head out to one of the many lakes and rivers in Eastern Washington, Eastern Oregon and Western Idaho to spend a week fishing and playing. Aaron is on Facebook but leaves most of the photo-taking and social media posting to his wife and daughters, who tag him. If he or his daughter catch a particularly large bass he'll post to Facebook for bragging rights. He gets his fishing gear and most of his clothing from Cabela's, he listens to the country music station and has the ESPN app on his phone. Most of his news comes from Facebook.

How he plans his vacations

Living on the Oregon/Washington border, Aaron and his family often venture north for the summer to new towns, lakes and rivers. Because they have a network of like-minded friends, they often ask them for recommendations. For this coming year's trip, Aaron used the Washington Department of Fish and Wildlife (WDFW) website to find steelhead fishing spots along the Columbia in the Richland area, less than an hour's drive away. He and his wife are excited to visit some of the wineries while they are there. His wife typically books the lodging: Airbnb mostly these days. They have favorite spots that they like to visit along their drive but use Google Maps to find new restaurants and shopping in real time. Aaron typically plans the hunting trips with his brother. They go where the hunting is best, and that changes somewhat from year to year, and again the WDFW website comes in handy here when they visit Washington. They often find themselves in Ferry County, using Colville as a home base.

Aaron's Customer Journey



Key Differentiation Statement

The research clearly says that diversity is our key asset. But how do we translate that into a "benefit of value" for a visitor? Many people in our research identified the fact that you can do a lot here (variety), and different kinds of things (urban, rural; adventure, indulgence; food/drink and outdoor recreation), which led us to look at a strategic differentiation statement that would highlight the dualism inherent in the Washington State experience. Our strategic differentiation message also targets the traveler versus the tourist. It also attempts to soften one of our challenges—that we aren't known for relaxation opportunities.

The basic idea is that when you combine both our natural beauty/outdoor recreation asset with our world-class food/wine/beer/coffee/spirits asset, you get something that is different than peer states, and that highlights that our target travelers are interested in meeting many of their interests in one trip. In addition, we want to highlight our progressive nature to some extent.

Strategic Differentiation Statement (not a tagline)

***Adventures and indulgences.
It all comes naturally in Washington State.***

This strategic statement is not about having it all. We're not all things to all people. Washington has two sets of assets (natural beauty/outdoor recreation and world-class food/wine/beer/coffee/spirits) that, when paired together, no other state can offer—in every region of the state. We can "feed" different parts of you. The part that wants to relax. The part that wants adventure. The part that wants more out of a trip than just a vacation. In Washington State, those adventures and indulgences all come naturally.

It is important to note that this message is not a customer-facing message, tagline or a campaign—instead, it is the key concept upon which to build marketing materials to ensure that we distinguish ourselves from competitive marketing efforts. In future Washington Tourism efforts, we recommend translating this message into a creative campaign, or conducting a full-blown branding initiative to further refine it.

Strategies & Tactics

This is what all the research, personas, Journey mapping and strategic differentiation statement boil down to—the major strategies to achieve our goals.

- Strategy 1** Quantitative research revealed high awareness of Metro Seattle (72%), but a significant drop in awareness of the rest of Washington State thereafter. We also heard of confusion between Washington State and Washington DC through social listening platforms. These data points, along with being the only state without statewide tourism marketing, led us to the first strategy. The major purpose of a statewide marketing campaign is to lift every region (think "Virginia is for Lovers" or "That's WY"). So our first strategy is to promote the state itself, perhaps highlighting the duality and diversity of assets, through the use of engaging storytelling techniques. This campaign will be used to attract visitors from our target states of Oregon, California, Arizona, Colorado and Texas, and would provide industry partners with campaign assets they could leverage.
- Strategy 2** One of the most identified needs by DMO and stakeholder surveys was a toolkit of development and marketing opportunities to amplify individual marketing efforts, in light of the fact that marketing capabilities vary across the state, from those areas with robust resources to the rural and tourism-dependent areas with small budgets and resources. Therefore, we want to offer DMOs and other statewide tourism-related organizations opportunities to participate in endeavors that combine resources into something bigger that they couldn't afford to do on their own. So this plan's second key strategy is the development of a prioritized set of marketing tools for industry partners, in the areas of media, marketing, training, research, events and destination development. The state is considering creating a mechanism to match industry partner investment 1:2, which offers the additional benefit of providing a funding source for the statewide tourism effort. It's a win-win, with the state and the industry partners all benefiting.
- Strategy 3** A third, related strategy is to build an online resource, for both the industry partner program and potential visitors, to identify opportunities and drive action. Our competitive audit highlighted the gap in an online resource from other states, and, through our personas and journey mapping, we know that websites and web tools are often used in decision-making phases. A revamped website would possibly replace the existing ExperienceWA.com website.
- Strategy 4** International visitors stay longer, spend more and are interested in assets outside of Seattle (national parks, tribal tourism, etc.). But, according to research, travel preferences vary greatly depending on origin. Therefore, the fourth strategy is to create marketing programs designed for specific countries, in particular to the UK, Canada, China, Australia and Germany. We have analyzed the opportunities from different countries, combined with what we have that will attract those countries, and recommend developing specific campaigns. These international campaigns will leverage the good work that has already been done by Seattle and the Port of Seattle.
- Strategy 5** And lastly, because our research identified some gaps in tourism amenities and destination opportunities, we recommend a strategy of small-scale destination development. This strategy would help the state's contractor identify and start to fund specific projects, such as a large food and beverage event, a historical (pre-European contact) marker program for tribal tourism, or support for hotel/inn development in rural areas with few places to stay.

Strategy 1	Tactics	Measured Outcomes
Promote the state itself	Create a fully integrated campaign attracting the out-of-state traveler. This includes creative, content, events, promotions/partnerships, and earned media.	Microsites Travel-related spending Nectaban Tourism jobs Motor center traffic Day-use Discover Passes
Purpose To generate interest, preference and ultimately visitation to Washington.		

The state's contractor needs to drive awareness, interest and preference for Washington State travel; that can't be done by individual DMOs or industry partners. To truly compete against peer states spending more on attracting visitors, we need a breakthrough campaign and effort that puts Washington State on the map. Specific recommendations to promote Washington and get it included in prospective travelers' consideration sets include the following:

Creative

Create a marketing campaign based on the strategic differentiation statement that promotes the entire state, like "Virginia Is for Lovers" or "Pure Michigan." Ideally, it would leverage our complexity, duality and passions, and the fact that we have more indulgences and adventures. This marketing campaign would be designed to be localized by regions and to target specific personas.

Content

- Break out the State Visitors' Guide into audience-specific itineraries, and distribute them through email, downloadable formats and social media.
- Generate content about indulgences and adventures, such as from fly fishing to wine tasting. Focus on video, infographic and photographic assets. Distribute through sponsored content on sites such as TripAdvisor, outdoorproject.com, etc., through industry partners, earned media efforts and owned media.
- Create a web TV series, hosted by Rick Steves or another celebrity, that is a video road show in which every episode pairs an indulgence and an adventure in some undiscovered area of Washington State.
- If the budget allows, put Washington State travel information kiosks in visitors' centers across the state, including national parks, state parks, etc.

Events

Create a world-class, statewide food/wine and outdoor recreation festival. Think Miami's South Beach Wine and Food Festival, or Aspen's Food and Wine Classic, or Vermont's Cheesemakers Festival. Partner it with Sunset, Outdoor or Food Network, with Northwest celebrity chefs, and only-in-Washington food experiences (Independent spirits, chocolate, wine, beer, foraged food, backpacking foods, oysters, apples). Hold it outside of Seattle (Bellingham? Tacoma? Spokane?). Include a keynote by a celebrity chef. All industry partners would provide food booths from their regions/sectors. Include rock climbing opportunities, virtual-reality zip-lining or kite-boarding, and other outdoor hands-on opportunities.

Promotions & Partnerships

- Develop cross-region itineraries and promotions: for example, see all the farm league sports teams, the ultimate Washington road trips weird Washington: agritourism etc.
- Partner with REI to include a "visit Washington" section in their stores in target cities.
- Send digital coupons that include at least one indulgence and one adventure to people requesting the State Visitors' Guide.

Strategy 1 cont.

Earned Media

Earned media is a lower-cost, high-impact opportunity for Washington State's contractor to pitch the "a state that feeds both your passion for adventures and indulgences" message. We recommend the following:

- Targeting travel, lifestyle, outdoor recreation and food/wine publications, with a particular focus on *Sunset*, *Food & Wine*, *Condé Nast Traveler* and *Dwell*, and lifestyle magazines in target states, including *San Francisco Magazine*, *Coast Magazine*, *Texas Monthly*, *Denver Life*, *Phoenix Magazine*, *Portland Monthly* and *BC Living*
- Identifying and targeting key outdoor bloggers and influencers, and travel adventure websites
- Pitching Chowhound, eater.com and other food-based websites
- Contributing content to outdoorproject.com
- Family tours where we can leverage the programs the industry partners currently have in place.

Social Media

Social media is another cost-effective way to get the state's messages to targeted prospects. From our journey mapping efforts, the state contractor's efforts would best be focused as follows:

- Creating an Instagram campaign with two side-by-side images; one an indulgence and one an adventure, geotagged, also repurposed for Facebook. Show the diverse assets throughout the state.
- Posting beauty shots in Reddit's /earthporn subreddit
- Creating a user-generated GoPro Vimeo channel of Washington State adventures
- Posting canvas ads in Facebook and Instagram

Paid Media

An actual media planning process, based on an actual budget, will identify the most effective media for the state contractor's promotional efforts. But some ideas that our customer journey maps have identified include the following:

- A spread event calendar in a magazine such as *Sunset* of all of the food/wine events in a year for travel planning purposes, and a similar spread of all outdoor recreation-related events. Leverage both print and digital properties.
- Waze ads that identify interesting places to stop along a route
- Digital ads and sponsored content on TripAdvisor
- A Google AdWords campaign for several personas. For example, when hunters and fishers are searching for licenses, we can provide them with an AdWords ad that drops a cookie so we can retarget them with contextual ads. We can do similar campaigns with those looking for national parks, wineries, recreation outfitters, and more.
- Retargeting ads to all those who request the travel planner, creating a lead-nurturing process with follow-up emails

<p>Strategy 2 Develop a prioritized set of marketing tools for industry partners</p> <p>Purpose Create opportunities for industry partners that will set them up for success and generate matching funds for the state.</p>	<p>Tactics Events, Research, Training, PR, Creative Assets, Digital Strategy, Advertising, Partnerships</p>	<p>Measured Outcomes Match dollars generated via co-op opportunities Rural tourism spending Tourism employment Industry partner success</p>
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This strategy maps back to the objective of creating marketing opportunities for industry partners large and small across the entire state, including rural and tourism-dependent areas, allowing them access to programs that exceeds what they otherwise could achieve on their own. In many cases, the funds industry partners contribute will be matched (at a rate of two-to-one non-state/state), providing future funds for implementation.

Events

This is an area where industry partners could easily band together to share booths, participate in trade missions and partner with other associations to create unique events. The three specific events we recommend are the following:

- Creating an experiential Washington State Tourism booth that combines indulgences and adventures, such as chocolate tasting and bouldering. Attending state travel expos in target states, DMAI and other travel conventions. Participating in cruising conventions. Letting industry partners participate in the booth with materials, staffing and presentations. Letting DMOs and associations participate in the booth with materials, staffing and presentations, and perhaps partnering with Washington's VR and AR communities to create augmented or virtual reality tours of the state, specific regions (such as Wine Country, volcanoes or the Gorge) or unique attractions. These conventions may be targeted at individual travelers, the travel trade or specific segments of the travel world, such as cruisers, so the booth must be designed to work for all audiences.
- Creating the opportunity to attend tourism/trade-related sales missions to China, the UK, Australia and Germany. As much as technology has changed the way business is conducted, many cultures still require that face-to-face

interaction that comes through business meetings. Valuable partnerships can be started from these trade missions. The audience for these missions is the travel trade and influencers in the target countries.

- Creating a partnership with AARP and jointly sponsoring a travel event with the organization in target states. Seniors have the time and money to explore beyond the gateways, making this partnership valuable to Washington State. The audience for these events would be AARP members.

Research

Primary research is very expensive, and syndicating a custom research project or going in on existing research can be a powerful way to stretch industry partner resources. Research also is important in measuring the impact of marketing efforts, and staying abreast of trends and changes in traveler behaviors. To that end we recommend two research programs, funded by the statewide Tourism Marketing Account as outlined in SB 5251 (if adopted), as part of the overall industry partner strategy:

- Allowing industry partners to purchase Dean Runyan add's and Longwood's syndicated research at a discount. These are the leading tourism studies and are the gold standard in terms of measuring tourism spending and trends.

Strategy 2 cont.

- Conducting an annual, online quantitative tourism benchmark and provide industry partners with the results. Allow them to add on their own questions for a fee. This syndication of quantitative research both makes different regions' efforts consistent and provides a way for a smaller tourism organization to piggyback on a larger study.

Training/Education

Reinventing the wheel doesn't help anyone. A centralized source of best practices in tourism marketing can raise every industry partner to the same high standard, and can provide smaller tourist-related organizations, especially those in rural areas, with the same abilities as those with larger budgets. This is particularly important when trying to attract international visitors, who may require additional infrastructure and services. The specific training and education support services we recommend the state contractor provide as part of the industry partner support strategy include the following:

- Developing training kits for small businesses in targeted marketing sectors, such as Marketing 101 for microbreweries, outdoor recreation providers, etc. In addition, we recommend webinars on such topics as Search 101, email marketing 101 and others.
- Creating a persona-marketing roadshow that the state's contractor takes out to regional industry partners, addressing such topics as "What are the six things you need to know to serve the Chinese market?" or "Targeting the aging baby boomer" or "What millennials want from adventure travel experiences." The state's contractor could also provide consulting on attracting the Chinese tourist, including infrastructure development support in the areas of food, signage, translation, group itineraries and more.

Crisis Plan for Natural Disasters

Natural disasters are unpredictable, yet inevitable. Their impact greatly affects tourism in the affected areas from an environmental, financial, employment and economic standpoint. We recommend an investment in a full crisis plan. Below are the foundational elements—the roadmap the contractor should follow when developing the crisis plan. The crisis plan should be a guide for communications during a disaster, and the recovery phase that follows.

Communications plan for areas experiencing a disaster

Washington State is known for diverse and spectacular scenery that draws visitors from near and far. That natural environment can obviously create some very real communications challenges when it comes to traveling to and from a variety of destinations in all corners of the state, due to forest fires, floods, avalanches, closures at any one of our mountain passes and the occasional volcanic eruption or earthquake.

As an example, people planning to visit Lake Chelan or Leavenworth may be concerned about reported forest fires in Eastern Washington, not realizing it has little or no impact on the mountain passes or air quality of their destination.

The number one priority is to transparently and proactively communicate what's happening in a particular region of the state and alert travelers to the actual risks at that time. That can include real-time forecasts, smoke maps, flood maps, avalanche reports and air quality reports through social media channels, media outreach, websites and emails from the destinations/hotels, so visitors don't unnecessarily cancel or postpone trips.

Here is a high-level overview of recommended activities to control the message, both during a disaster and the recovery phase:

1. Social listening: Monitor social media channels to see what locals, visitors and the media are saying about concerns with traveling to any particular region.
2. Reactive messaging: Correct any misinformation and proactively communicate what's going on.
3. Proactive messaging: Leverage owned social media channels, blogs and websites to post accurate information about what travelers can expect.
4. Media outreach: Work with media outlets (broadcast, print, online) across the state to share updates and traveler alerts so travelers can make informed decisions.

Strategy 2 cont.

Each destination should have a dedicated team lead that will gather the latest information, working with the proper authorities and/or agencies. They should then work with their communications team to monitor and share information as often as necessary. Lastly, they should monitor how any natural event is impacting their bookings throughout the region.

Ongoing recovery phase of disaster

Once any concern has subsided, regardless of the scale, the messaging should not stop. Any social media channels, online sites or news outlets that reported on the situation should be made aware of the current status. If possible, share a link to a real-time video stream of the destination on as many web sites and social media channels as possible. That link can be shared with any and all media contacts who've covered the region, locally and nationally. Lastly, if there is ongoing concern with visitors, a FAM with targeted short-lead journalists is a smart tactic as nothing beats a third-party testimonial of current conditions.

Digital Assets

A statewide digital asset pool, including a digital strategy, will leverage everyone's efforts. The assets that should be created include videos (often too pricey for individual industry partners to create), photos (to provide high-quality, non-stock natural beauty shots) and an Search Engine Optimization strategy. Specifically, we recommend the following:

- A new partnership with an airline, such as free baggage allowances for any made-in-Washington product, such as cider, spirits, salmon, oysters, glass art, apples, etc. This supports agritourism and travel beyond Seattle, and has an earned media upside.
- Flying- and train-bundled promotions for trips across and down Washington. This would get people to move beyond Seattle to where Amtrak goes, such as Leavenworth, Vancouver, Olympia and Bellingham.

- A ReachNow or other car-sharing partnership for discounted car rentals to visit east of the Cascades. As millennials move beyond traditional car rentals to car sharing, we want to be offering discounts to get out-of-staters beyond Seattle.
- Partnerships with cruise lines and cruise aggregator sites, including river cruises. As part of our pre- and post-cruise persona, we need to make sure that we are thinking creatively about how to get in front of cruisers while they are planning their overall trip.
- Partnerships with Washington State Wine and REI to amplify our creative campaign through social media demonstrating both adventures and indulgences.
- Partnerships with excursion companies that represent the 'adventures' in the state paired with an indulgence on an itinerary: rock climbing followed by locally grown trail mix and craft beer tasting.

Strategy 2 cont.

Advertising

While the state's budget is relatively modest when compared with peer states, we do recommend some traditional and digital media spending to provide a lift to the state's awareness and preference among out-of-state travelers. Our recommendations for where to put that spend are as follows:

- Media buy-downs on national advertising opportunities. Recommended are both printed and digital publications such as *Sunset Magazine*, as it combines both adventure and food/wine in its editorial. To reach a younger demographic, we recommend publications such as *Dwell* magazine, targeting its West Coast subscribers. And to reach outdoor enthusiasts in support of rural DMOs, we recommend *REI Newsletter* and *Outdoor Magazine* digital ads and advertorials.
- Pitch *Sunset* to dedicate a 13th issue entirely to Washington State. Industry partners can buy into that issue with their own ads and articles.
- Many of our personas use TripAdvisor to plan their trips. We recommend running both ads and sponsored content on this site. You can use its reach and relevancy to add credibility to your landing page and content sites. Their Premium Destination Partnership lets you post mobile-friendly video and other content on its site.

Creative

A creative campaign that sells Washington State has two purposes: to help drive visitors and to provide DMOs with creative assets they can leverage, use or localize. We recommend the following:

- Leveraging the statewide creative campaign identified earlier that industry partners can leverage, use or extend, through the use of creative assets such as a brand icon, a headline, photos and videos.
- Creating Washington State campaign-based swag for industry partners to give out at their booths.

<p>Strategy 3 Build an online resource</p> <p>Purpose Build a resource for travelers in the consideration and planning phases, as well as to industry partners to help them attract visitors</p>	<p>Tactics Research, User Interface, User Experience, Content, Design, Development</p>	<p>Measured Outcomes Website metrics for traveler and industry sites Where possible, attributed link between website traffic and travel booking</p>
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<p>Strategy 4 Create marketing programs designed for specific geographies</p> <p>Purpose Efficiently attract international travelers and pull them out of the urban gateways to the rural and tourism-dependent areas of the state.</p>	<p>Tactics B2B and B2C tactics, including social tours, websites and partnerships in target countries: China, UK, Australia, Germany, Canada (BC)</p>	<p>Measured Outcomes International visitor volume Overall travel-related spending Industry partner participation in international marketing efforts Website analytics Walker Center traffic Discover Passes</p>
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To help support industry partners and travelers planning their trips, we believe ExperienceWA.com needs an overhaul. Recommendations include the following:

Industry website

- Searchable co-op and other opportunities, by category, cost, audience, season and region
- Industry partners can find research, trends, share successes, and see what other states and regions are doing
- Educational resources, such as webinars, toolkits, SEO strategy recommendations, etc.
- Search for and access assets, including photography, infographics, marketing campaign elements, logos, videos and more
- Co-op suggestion box for ideas for the state's contractor to build in the future
- Connect with other groups—create a sharing platform where industry partners can solicit feedback or learnings from other industry partners

Tourist website

- Emphasize mobile first, as many of our personas use their smartphone to do their research
- Provide an easy way for visitors to research rural areas, book travel and surface adventures and indulgences
- Searchable maps for trailheads, breweries, wineries, outdoor outfitters, spas, chocolate factories and more. Have overlays by personas: let people identify what type of traveler they are, and then serve them up suggestions for activities and itineraries
- Research the feasibility of including a booking engine for hotels, tours, rental cars, etc.
- Ferry and train schedules, with links to booking
- A collated online event calendar of all the races, active sporting events, wine and beer events, food events, etc., searchable by interest
- A searchable online hub of all outdoor recreational activities and opportunities in the state. Perhaps create an intuitive trip planner that provides ideas for a specific day/route to identify fun things to do and see along the way
- A fun web feature that suggests indulgences to go with a selected adventure, and an adventure to go with a selected indulgence
- A carousel of beauty shots, seasonal promotions, partnerships and itineraries
- Localization in German and Chinese

There is no "international" market. There are markets from specific countries and psychographics, but the state's contractor needs to address target geographies in their own ways, through specific messages, channels and tactics. Additionally, they need to work closely with Visit Seattle and the Port of Seattle, who both have representative firms in these countries. They should bring tour operators and international media to the state to help "sell" our destination to their clients.

Our target countries include China (which could also represent other long-haul Asian visitors), the UK, Canada (BC), Australia and Germany. Here are our recommendations for targeting specific countries:

China

Chinese visitors make their decisions based on research with influencers, particularly those who create travel videos. Our efforts to attract people from this market will include the following:

- Earned media and digital display ads with vloggers and Chinese travel shows
- Support for industry partners regarding the development of Chinese visitor infrastructure and services (see strategy 2)
- In-feed video advertising on Weibo
- Leverage the good work the Port of Seattle and Visit Seattle are already doing. Support for industry partners to attend trade trips and trade shows (see strategy 2)
- Partnerships with large tech companies in Seattle (Amazon, Microsoft) to get the word out to their visiting Chinese employees, and perhaps a concierge service
- A map overlay of Chinese-friendly activities, food and language translation (see strategy 3)
- Partnership with the Washington State Wine Commission to identify wineries most closely linked to the Chinese palate
- Delta in-flight content, either in their magazines or in video content
- A localized website in Chinese (see strategy 3)

Strategy 4 cont.

UK

The British visitor is typically one that plans on visiting Seattle, in large part because of direct flights into SeaTac Airport. Our efforts need to be in moving them beyond the urban experience through transportation opportunities. Our journey maps also indicate that they can be reached through social media sites. Specific recommendations to travelers from this country include the following:

- Delta and Alaska in-flight content (see China)
- Rental car site digital banner advertising and ReachNow partnership
- Facebook, Instagram and TripAdvisor organic and sponsored content

Australia & Germany

Travelers from these two countries are similar in terms of their interests and how they travel. For these countries, we recommend the following:

- Facebook, Instagram and TripAdvisor organic and paid content
- Earned media focused on our state's microdistilleries, microbreweries, and legal cannabis
- Rental car site digital banner advertising and ReachNow partnership (see UK)
- A localized website in German

Canada (BC)

BC is more like a state than a country in terms of marketing efforts, so the activities that follow in strategy 4 can be applied to this audience. However, there is one specific tactic/channel we suggest:

- Digital outdoor boards along I-5 that are targeted to time-sensitive events that may be of interest to Canadians visiting during their holidays (Family Day, their Thanksgiving, etc.). Use to encourage visitors coming to shop to see more of the state. These digital boards can also be used to highlight our creative campaign with specific adventure-and-indulgence pairs for the Canadian market.

Strategy 5	Tactics	Measured Outcomes
Promote small-scale destination development	Identify and plan for infrastructure enhancements to tribal tourism, lodging/food connections in rural areas and agritourism.	Increase travel-related spending in rural and tourism-dependent areas
Purpose		Increase tourism employment in rural and tourism-dependent areas
Develop rural and small-scale destinations so they can support a greater share of visitors.		Lodging and sales tax receipts
		Increase motorable and visit to travel to rural and tourism-dependent areas

This is an area that requires more research, analysis and ideation. However, in our marketing research efforts, we identified four main needs for the state in terms of actual destination development:

- Rural DMOs told us that many European tourists would like to better understand our region's native populations. The tribes also told us that they would like to drive more tourism than just casino-based visits. But finding appropriate ways to learn about our native tribes has many challenges. While this needs more development, one idea was a Colville tribes-based driving itinerary complete with pre-European-contact historical markers.
- Many of the more rural regions, such as Wine Country, identified a lack of hotel rooms as a deterrent to attracting visitors. Some kind of inn construction bonds or linking of needs with developers might be a solution.
- Developing agritourism through maps, signage, a section on the website and listings.
- And lastly, the state's contractor could create a statewide, high-profile event.

Some examples

Create the first artificial-reality drone-racing event up the Columbia River, or repurpose the track in Watsburg.

Create a destination, a la Arizona and spring training, to attract people to see all our farm league teams, e.g., itineraries, package deals or co-promotions (from the Everett AquaSox to the Yakima Bears to the Tri-City Dust Devils).

Support tourism from west to east through something like a geocaching event that requires touching each corner of the state to win, or a Ragnar Relay-like race that runs from Spokane to Seattle, or an *Amazing Race* spin-off event where participants go from adventure to indulgence, such as catching a fish then cooking it with a celebrity chef, or going skiing and to the beach in one day, ending with a massage.

The first step in deciding what and how to invest in these would be to convene a study group to identify needs, brainstorm opportunities and select one to implement.

Recap

The Goals

Our goals, the big-picture achievements we are trying to accomplish, have been outlined by The Washington State Tourism Marketing Committee, composed of members of the WTA, state DMOs, Washington State Department of Commerce, WSDMO and other interested stakeholders. They are:

- Attracting not new visitors from out of state and internationally
- Attracting more visitors to locations beyond the urban gateways, particularly rural and tourism-dependent regions
- Highlight the natural wonders and outdoor recreation opportunities of the state
- Support tourism-dependent industry partners through education, training and co-op opportunities
- Offer communications assistance for tourism areas impacted by natural disasters

Strategic
Differentiation
Statement
(not a tagline)

*Adventures and indulgences.
It all comes naturally in Washington State.*

Strategy 1 Promote the state itself	Tactics Create a fully integrated campaign attracting the rest of state traveler. This includes creative, content, events, promotions/partnerships and earned media.	Measured Outcomes Merchandise Travel-related spending Merchandise Tourism jobs Visitor center traffic Day-use Discover Passes
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Strategy 2 Develop a prioritized set marketing tools for industry partners	Tactics Events, Research, Training, PR, Creative Assets, Digital Strategy, Advertising, Partnerships	Measured Outcomes Match dollars generated via co-op opportunities Rural tourism spending Tourism employment Industry partner success
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Strategy 3 Build an online resource	Tactics Research, User Interface, User Experience, Content, Design, Development	Measured Outcomes Website metrics for traveler and industry sites Where possible, attributed link between website traffic and travel booking
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Strategy 4 Create marketing programs designed for specific countries	Tactics B2B and B2C tactics, including social tours, webinars and partnerships in target countries: China, UK, Australia, Germany, Canada (BQ)	Measured Outcomes International visitor volume Overall travel-related spending Industry partner participation in international marketing efforts Website analytics Visitor center traffic Discover Passes
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Strategy 5 Promote small-scale destination development	Tactics Identify and plan for infrastructure enhancements to rural locations, lodging/accommodations in rural areas and agriculture.	Measured Outcomes Increased travel-related spending in rural and tourism-dependent areas Increased tourism employment in rural and tourism-dependent areas Lodging and sales tax receipts Increased merchandise and items to travel to rural and tourism-dependent areas
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Measurement

Earlier, we specified KPIs for the tourism marketing program:

- Visitor-related spending
- Domestic and international visitor volume
- State and local tax revenues
- State and local lodging revenues
- Growth of tourism-related jobs/employment
- Dollars generated via co-op opportunity participation by the region's industry partners and Chambers of Commerce, the Port of Seattle and statewide associations such as the Washington State Wine Commission and the Washington Hospitality Association
- Mindshare, a benchmark wherein our target visitors to tell us how much they know and think about Washington State in comparison with our peer regions. Are we in their consideration set?
- Media metrics, including click-through rates, engagement and media coverage

The first measurement of success is industry partners' participation in the co-op and other opportunities made available to them.

In addition, we recommend using Dean Fluryan, state-generated revenue reports, mindshare and awareness primary research, social listening, Google Analytics and DoubleClick to measure the success of this program.

Budget

As there is currently no state-supported tourism marketing effort, we recommend this plan be implemented over a five-year period. That will allow the state contractor selected to execute the state tourism marketing plan to first establish the foundation, then build upon it as resources and funding becomes available.

*The recommended allocation of those funds is as follows:

Tactic	First 12 months	Years 2-5
Research	2%	2%
Events	3%	5%
Training	2%	4%
PR (earned media)	12%	8%
Creative, asset, content development	27%	10%
Paid advertising media (print, digital, outdoor, etc)	28%	45%
Website (Industry, consumer)	8%	2%
Partnerships/programming	1%	4%
Social media	3%	2%
Travel trade	7%	11%
Administration	7%	7%
Total	100%	100%

*Budget allocations are contingent on final legislative action and subject to change.

Timeline

Strategy 1	18 Month	3 Year	5 Year
Promote the state itself	<ul style="list-style-type: none"> Conceptual phase Production Content-development Earned media plan Paid media plan Heavy social media Event planning Amplifying industry partner events 	<ul style="list-style-type: none"> Heavy earned and paid media Event implementation Robust content plan implementation 	<ul style="list-style-type: none"> Continued earned and paid media Consider forming a creative campaign Continued event plan and content plan

Strategy 2	18 Month	3 Year	5 Year
Develop a prioritized set of marketing tools for industry partners	<ul style="list-style-type: none"> Plan, conceive and produce event themes/materials Implement access to existing research Solicit training/continued education preferences Develop full crisis communications plan Leverage statewide campaign on a local level Negotiate and implement co-op advertising opportunities Conceive and produce creative assets to be used by industry partners Identify and negotiate partnership opportunities 	<ul style="list-style-type: none"> Expand event opportunities Expand research access Develop and implement full training program Continue to find and negotiate compelling co-op opportunities Refresh creative assets Amplify partnership opportunities 	<ul style="list-style-type: none"> Evolve event and tour opportunities Continue research access Evolve and add to training program based on need Continue to find and negotiate compelling co-op opportunities Update local campaigns based on new statewide campaign Continue to amplify partnerships

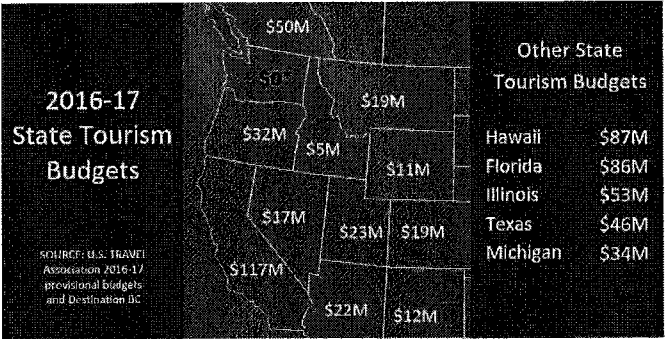
Strategy 3	18 Month	3 Year	5 Year
Build an online resource	<ul style="list-style-type: none"> Research and information architecture for industry and tourist sites User experience strategy Content development Design Development 	<ul style="list-style-type: none"> Additional, enhanced content Evolved experiences Updates with new opportunities 	<ul style="list-style-type: none"> Added website features Ongoing maintenance Updated concept based on new marketing campaign Updated IA, UX, design, development

Strategy 4	18 Month	3 Year	5 Year
Create marketing programs designed for specific countries	<ul style="list-style-type: none"> Identify and negotiate corporate travel partnerships Leverage Visit Seattle's and the Port of Seattle's relationships and programs Social media campaigns Identify and plan for infrastructure needs 	<ul style="list-style-type: none"> Implement infrastructure changes Website localization Origin country-specific plans Add/evolve marketing opportunities 	<ul style="list-style-type: none"> With solid foundation, research additional origins Continue to leverage partnerships Continue to identify DTC opportunities

Strategy 5	18 Month	3 Year	5 Year
Promote small-scale destination development	<ul style="list-style-type: none"> Research to identify needs Identify assets Brainstorm opportunities 	<ul style="list-style-type: none"> Build a plan 	<ul style="list-style-type: none"> Implement

Appendix

State Tourism Budgets Map
Ethnographic Research Report
Quantitative Research Report
Glossary



*No state funding, no tourism office. The nonprofit Washington Tourism Alliance contributed \$400,000 to distribute visitor guides, maintain a website, and provide limited marketing activities.

A Road Trip Through Undiscovered Washington

Notes & observations on travels through:

- White Salmon
- Castle Rock
- Blackfoot
- Spokane
- Coeville
- Republic
- Lynnden
- Bellevue
- Wenatchee
- Sturgeon Bay

Words & photographs: Adam Smith for GreenBusiness
12/17/2017

November 26, 2017-SOMEWHERE ON 84-It is the Sunday morning after Thanksgiving and I'm going to work.

Work, in this case, is an eleven-day trip through Washington State. I'm searching for hidden gems, the towns, cities and regions that are often overlooked by tourists and others visiting Washington. Using a hybrid of observation, photography and interviews, my goal is to create a portrait of these places, to bring them to life in an unusual and vivid way for people that have not yet discovered them.

Driving toward Washington from Portland, I'm temporarily blinded by sheets of rain. How ironic, I think. I'm looking for hidden gems, and it would seem the Northwest fog and rain is doing its best to keep them hidden.

The search begins.

Undiscovered Washington

White Salmon



November 26, 2017 - WHITE SALMON, WA - Perched on a hillside 300 feet above the Columbia River, with a majestic view of Mt. Hood directly to the south, White Salmon reminds me of a decidedly northwest version of a small Swiss village carved into the mountainside. The main road, Joseph Boulevard, runs right through town and is home to several small shops, including an artist studio, a brewery, an upscale restaurant, and a pizzeria. There is not a chain store to be found. Swimming white salmon are pointed out between the lines of the crosswalks. There are no stoplights.

White Salmon's motto is "Where the sun meets the rain," but the sun still hasn't shown up and the rain is sticking around, so I jell into one of the many empty parking spaces and, after a quick search for a non-existent meter, I duck into Everybody's Brewing. It's a warm, inviting place with a handful of people scattered among tables enjoying a pint, some food or beer.

Jamie took her here. Energetic and outgoing, she looks like she could have just stepped off the pages of a Virginia catalog. She moved to White Salmon six years ago from Hood River, just across the Columbia. Originally from Portland, Jamie moved to Hood River to be closer to the outdoors. But it soon became too crowded. Portland grade severity started creeping in, so she moved across the river to White Salmon, where it is milder, less crowded, quieter, and even closer to the things she loves doing: hiking and biking in the summer and skiing in the winter.

She says that, like herself, most of the people that are here come because of the easy access to a variety of outdoor activities. That is confirmed by Jody and Jason, who are up from Portland for a day of mountain biking. They tell me they prefer to stop for food on their way home in White Salmon

over Hood River because it is less crowded and they don't have to search for parking.

Billy fell and encouraged by what looks like a possible respite from the rain (apparently, according to locals, it never rains for that long, and there are regular rain breaks), I walk across the street to check out Atelier 216, a small artist studio and gift shop. Sally Gilchrist is a printmaker and part owner of the shop. Five years ago she moved to White Salmon to be closer to her grandkids. Like Jason and most everyone in White Salmon I spoke with, she loves how accessible the outdoors is and how close Portland is, but she has also found that this small town living has grown on her in some unexpected ways. As we chat, several friends pop in for no other reason than to say hello. "It's provided a social life without any commitments," she tells me. Living this close to friends means she doesn't have to coordinate calendars and make plans to be with friends; it just happens over the course of any given day.

Thirty minutes from world-class wineries, an hour's drive from Portland, and with the outdoors in its backyard, White Salmon is a place you can be hiking in the morning, wine tasting in the afternoon, and seeing a concert in the evening. It is the best of small town living and big city life. But residents fear the secret is out. With a couple of tech companies recently moving into town, older and wealthier retirees buying second homes, and the trendy Society Hotel coming to nearby Ringo, locals worry that this hidden gem will not stay hidden for long.

As I pull out of town I spot two women and a child dancing around, adorned in bright clothing, scarves and shawls. "It's Sunday Fun Day so we thought we'd dress up as dragons," Galaxy (her dragon name) tells me. A jewelry artist, she's lived here for five years. She and Fiona (another dragon

Undiscovered Washington

White Salmon

name) feel deeply connected to this supportive community. They feel that by living here they share something rare, something secret.

"Don't send any more people our way," Galaxy says with a smile. I nod, then the three of them give me a big friendly Oregon wave, and I'm back on the road.



Undiscovered Washington

Klickitat



November 27, 2017 — KLICKITAT, WA — It is 7:30AM and although the voice on the other end of the phone is positively sunny, while looking out the window of the cathedral-like lobby of Skamania Resort, all I see are blankets of rain and fog hiding the Columbia River.

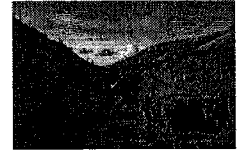
I'm talking with Lovi Zoller, one half of Zoller Adventure Fishing.

"You take a left and go down the dirt road. About a mile, it seems to take forever, but you will see an essentially on the right," she says.

Then, perhaps sensing a bit of apprehension in my voice and possibly wanting to reassure me, she adds, "Let me know when you are on the way and I'll send Tracy to keep a lookout for you."

I hop in the car and start heading east. The clouds, rain, and cold dark air are starting to get to me, but as I wind along the Columbia and pass through a succession of tunnels carved out of the surrounding hills, an interesting thing happens. As the miles go by, the landscape starts to change. Damp moss becomes golden grass. Wet air starts to dry. Clouds yield to the sunshine. It's remarkable and wonderful to be reminded just how different the weather is on this side of the state.

As I turn off Highway 14 and start traveling up the Klickitat, I lose cell reception, but my apprehension I felt earlier melts away and becomes irrelevant when I finally see Tracy and his dog waiting for me about halfway down the dirt road.



Tracy Zoller is a second-generation hunting and fishing guide. It's in his blood.

Tracy runs a six-rabbit lodge on his property along the banks of the Klickitat River. As he expounds on the relative effectiveness of different kinds of bird calls used in his last turkey hunt, he shows me around the cabins and an outdoor kitchen bar gathering area and firepit, where clients relax after a day on the river.

In the summer it's fishing for Steelhead. In the fall Chinook and coho. Winter is reserved for special hunts, like black-tail deer. And spring is wild turkey season. People come from all over the country to have Tracy take them on hunting and fishing trips. He tells me how, upon their arrival, he likes to suggest that they walk through his vineyard down to the banks of the river. He tells me how gratifying it is when they return and he can see that the mountains, trees, and river in this remote spot resonate with them as much they do with him.

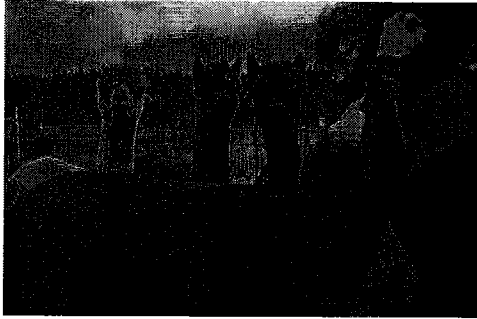


He tells me that people will see things on his excursions that they will never see anywhere else. As he riffs about what he does, where he lives, and the wildlife that surrounds us, he is proud, respectful, and enthusiastic, but never overbearing. It is obvious he has deep love for nature, and I find his passion for it contagious.

"I'm rich because I'm happy," Tracy says. "This allows me to connect with others through my expertise, and to share what I love."

Undiscovered Washington

Trout Lake Valley



November 26, 2017 - TROUT LAKE VALLEY, WA - I want to better understand why it is so important for people to be close to nature. So I head north, into the very wilderness that is White Salmon's backyard. I only have two more hours of daylight left, so I decide to head up Highway 141 toward Mt. Adams to see Furber Hansen, who runs Meadowrock Alpaca Farm.

Barbara is 70 years old and a retired accountant. She and her husband started Meadowrock 11 years ago. Around 1,000 tourists visit her farm each year, so I figure she has a pretty good sense of the kind of person that travels here and why they do it.

As she shows me her alpaca, she tells me about her growing up in this area. She recalls looking out her bedroom window at Mt. Adams in the distance and dreaming about climbing it one day. That dream stayed with her throughout adolescence and into adulthood, until one day, in the summer of her 50th year, she found herself standing on the top of Mt. Adams with the world spread out below.

"Up there you can breathe in the universe," she tells me.

Her climbing days behind her, she now revels in the changing of the seasons. Particularly the beauty of the fall, when the air is crisp and the cottonwoods, maples, and aspen turn shades of brilliant yellow, orange, and red. The fall, she says, is the time when "you've worked all year, enjoyed the summer, and things start to wind down and get quiet. It's time to relax."

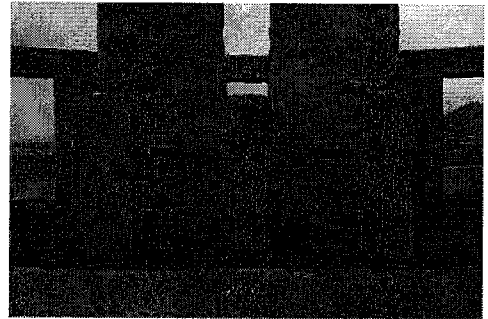
It's the desire for solitude and peacefulness, along with the same independent spirit and sense of determination that propelled her up the mountain, that she notices most in the travelers that choose to spend time in this region, she says

the people that come here to climb mountains, hike trails, kayak rivers, pilot snowmobiles, and hunt in dense forests are not looking to be catered to. Once you leave White Salmon, there are few lodges for shelter and few restaurants for food.

"The solitude and peacefulness make you feel closer to yourself. This is a vacation spot for people who are self-reliant. You have to bring yourself," she tells me as the sun dips below the horizon.

Undiscovered Washington

Goldendale



November 24, 2017 - GOLDDENALE, WA - Coming into Goldendale from the east, it is impossible to miss the Maryhill Museum of Art, which sits perched on a bluff, high above the Columbia. Opened to the public in 1910, the Maryhill Museum houses a diverse collection of art and recently had a sleek and modern wing added. Visitors are often surprised at the breadth of work on display. Here they can see works from Auguste Rodin, European and American paintings, a wide variety of Native American art and artifacts, outdoor icons, outdoor sculptures from Northwest artists, and more.

The executive director, Colleen Schadeuth, tells me that the museum is big to people who are not necessarily art lovers. It's more likely they come to Maryhill as art novices and leave curious and inspired, with a greater awareness and appreciation for art.

Maryhill's location is such a beautiful, if unexpected, spot makes it unique because "it combines the best part of nature with the best part of humanity," Colleen tells me.

Golddendale, just north of Maryhill and off Highway 97, is a town that feels like it is at a crossroads. The major employer, an aluminum factory, closed recently, and the effect is immediately visible. Many buildings that line the main street running through town sit empty. At first pass, Goldendale doesn't feel like a hidden gem to me, but I remind myself that it is surrounded by natural beauty and appears to have an abundance of potential.

It is that potential that drew Justin and Jocelyn Leigh here: 15 months ago when they were looking for a place to open a



brewery and call home. They met in Chicago, at graduate school. When they finished, they wanted to move to Washington to be closer to Jocelyn's family in Vancouver.

Undiscovered Washington

Goldendale



Over a pint of String Cheese IPA, Justin tells me that he and Jacoby wanted to locate somewhere where property was affordable and people were down to earth. It needed to be within 100 miles of Portland, yet small enough so they could make a real difference in the community.

"I thought all of Washington was wet," Justin says about the first time he set foot in Goldendale. "I didn't know this region. The dry side of Washington was stunning, the landscape a picture from a prehistoric time."

It didn't take them long to decide to make Goldendale their home and to start Dwinell Country Ales, which has contributed to the revitalization of downtown. In a relatively short time it has become a draw for tourists passing through and a much-needed regular meeting place for locals.

We are soon joined by Paulette LeFevre-Hollbrook, owner of a local ranch and the Goldendale Farmers Market president, who jumps into our conversation. Together they tell me about Goldendale's proximity to nature, the fair beautiful reasons, how it is at the crossroads of Yakima and Columbia wine country. They tell me how their Street is ripe for revitalization. They explain how area farmers are starting to work together to build awareness about the farming way of life, and partnering with local restaurants and wineries to bring their products to more people. I can tell they are excited about the potential they see in this town. This sentiment was echoed in a conversation earlier in the day with Cassie Courtney, the director of marketing at Maryhill Winery, who believes Goldendale is poised to be known as the eastern gateway to the Columbia River Gorge.



As the sun starts to go down, I head to the Goldendale Observatory to do some screen stargazing and chat with the director there, Troy Carpenter. Troy moved to Goldendale from Philadelphia five years ago and soon after became the director of the observatory. Home to the largest publicly accessible telescope in the United States, the Goldendale Observatory is the perfect place to come learn about, and marvel at, the mystery of the universe that surrounds us.

Chatting with Troy, as he opens the dome and prepares the telescope, it is obvious that he is a gifted teacher. His employ of the Socratic method and persistence for showmanship undoubtedly make his presentations to groups in the learning center a must-do for many traveling through Goldendale. Unfortunately, just as the sun disappears below the horizon, the clouds roll in. No stargazing tonight. I head back to my Airbnb, the Red House, and then go to bed.

The Red House is a treasure and staying there is like residing in a work of art. An old Victorian farmhouse built in 1890 and lovingly cared for by owner John Dove, it is on the national and state record of historical places. Every painting on the wall, statue on the shelf, rug on the floor, and piece of furniture is perfectly curated and placed by John to create an utterly beautiful lodging experience. I want to stay in every room and explore every corner of this unique house. I soon settle for the room on the main floor and fall asleep quickly on the comfortable queen bed.

In the morning John comes over. I'm surprised to learn that, in addition to being the owner and host of the Red House, he

Undiscovered Washington

Goldendale



spends most of his time in Seattle working as a gardener. I'm curious about the reason Goldendale has captured his heart.

He talks about how the scents of sagewood, woodsmoke, dried grass, and pine trees permeate Goldendale and remind him of days spent on his grandfather's farm as a child. The scenery is comforting, relaxing, and profound.

He goes on, "Here you can see the contours of the earth. In Seattle, the air smells like diesel. The air here smells like air. Yes, it can smell the planet."

Before I leave Goldendale, I stop at a life-size replica of Stonehenge. Cast out of concrete, this replica was dedicated in 1918 to commemorate the service of local soldiers who died during WWI. As I walk around the monument, I am struck how the various monoliths combine to frame distinct views of the beautiful vineyards, meadows, and Columbia River below. The landscape that is revealed, and the way that I am experiencing this moment, depend on where I am standing and what the structure allows me to see. The structure brings an order to the beauty of this area, as if the vastness is too much to take in all at once. As I think about this, and the last 24 hours I've spent in Goldendale, my mind drifts back to my arrival, and the notion of hidden gems.

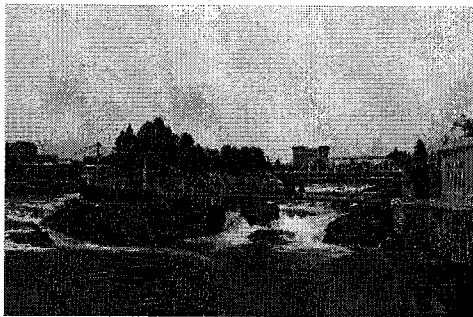
I wonder if perhaps they are everywhere, all around us, all the time. If this is true, then maybe all we have to do to find them is to be curious, to let go of expectations, to be willing to

look at things differently, and to exercise our ability to change our perspective.



Undiscovered Washington

Spokane



November 30, 2017 — SPOKANE, WA — I'm walking through Riverfront Park on a footbridge suspended over the Spokane River that runs through the heart of downtown. The churning waterfall below fills my ears with its roar. The momentum and velocity of this constant flow of water is palpable. The river powers this city, figuratively and literally.

Christy Branson, a successful artist who calls Spokane home, tells me she loves the river and couldn't imagine Spokane without it. It is beautiful, and its constant flow feels like it washes the city clean, day after day. She considers it a source of life, but its movement also feels a bit risky, urgent, and exciting.

Kind of like Spokane's current renaissance. I find myself thinking:



Christy says that Spokane, with its classic brick buildings, looks like an old city but has the soul of a young one: vibrant,

optimistic, and energetic. She tells me you can see this at Kendall Yards, a new development mixing retail, restaurants, and residences overlooking the Spokane River and Centennial Trail. You can see it in the crowds of people that come out for its Wednesday night Farmers Market. You can see it in the emergence of several new restaurants that could hold their own in Seattle or Portland. You can see it in the arts collective, Terris. You can see it in the new concert venues and clubs that are able to draw first-rate musical acts.

This idea of a renaissance is echoed by local Heather Simonsick, who moved here from Seattle five years ago. "It's different than it was in the 90s," says Heather. "Spokane has opened itself to art, music, and food. It has made a huge cultural leap."

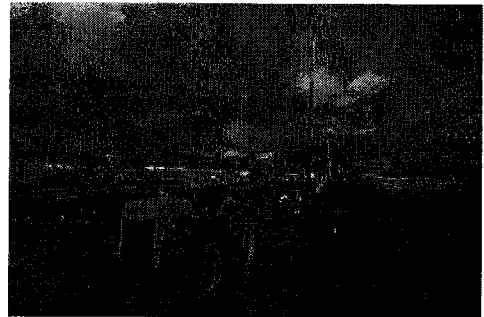
"Spokane makes being outside easy," says Heather. She's right. I think to myself as I walk around Manito Park, one of Spokane's many public parks. It's the middle of winter and most of the trees and fountains are dormant, so only the bones of the park, which, on this morning, with a dusting of frost on the grass, are beautiful in their own right.

In Spokane, nature is accessible and living is affordable. Locals have always known this. What has changed is that they are starting to be proud of what Spokane is, and what it is becoming.

Adam Hegsted, chef/owner of the Wandering Table, tells me about the genesis of his restaurant. It started with an informal chef summit, a annual get-together where a handful of chefs in the region convene over food and drinks to discuss their influences and their creative ideas.

Undiscovered Washington

Spokane



Adam tells me that when the topic turned to what it means to be a chef from this region, most of his colleagues spoke as if they were ashamed of being from Spokane, that despite their talent and creativity, this fact somehow made them less than. As they talked they realized that with their creativity and community, and the abundance of quality ingredients grown and raised in their backyard, they shouldn't apologize for being from Spokane. On the contrary, they should be proud of it. That's when they decided to start building a regional identity around their food, and Adam decided to open his restaurant.

I ask Adam what a visitor who stays in Spokane for a couple of days might take away from the trip. He says that they would leave thinking that Spokane city living and the quality of the cultural experiences the city offers are equal to those in larger cities, but are more accessible and affordable. Add to that the fact that spectacular outdoor adventures are within a 30-minute drive, and you've got the best of both worlds. <small>—</small>



Undiscovered Washington

Colville



December 1, 2017 -- COLVILLE, WA -- Writing out in front of Clark's All Sport and observing several men walk out carrying newly purchased rifles was strange, if a bit intimidating, for a city dweller like me. That's why it's reassuring to hear John Smith tell me that if Colville were a person, it would be the kind of person who would pull over to the side of the road in the rain to help you fix a flat.

John has graciously offered to be my tour guide today. Articulate, soft-spoken and kind, John is the former Colville Chamber of Commerce president and before that, a state legislator. Over a huge burger at Mervin's, he tells me how he fell in love with Colville when he moved here in 1980 to work on a cattle ranch after high school. He found the wide-open space, the hills, lakes, trails, and air to be "rejuvenating and rejuvenating." He tells me how he could park his truck on Main Street and leave it unlocked with the windows down. He says it's a place where the people are very friendly and helpful. They have a deep connection to the surrounding landscape and outdoors.

"A small town is like an extended family," John says. "There's a real familial connection between people here."

He says that most visitors that come to Colville come for the proximity to the outdoors and the surrounding nature. They come to hike, boat, lake, land, and fish. They fall in love with the beauty and solitude. The thing that makes Colville unique, he tells me, is the space. Even in the height of summer, when people flock to play on Lake Roosevelt and rent large houseboats that resemble floating motels, it never feels crowded. "You can boat on Lake Roosevelt all day and never



see anyone else, never need to worry about crossing your fishing lines...there's room," he says.

And indeed, today there is nothing but room. Hunting and fishing season is over. It is cloudy, cold, and gray. Everyone has gone home. I like John at his word when he says the marina on Lake Roosevelt is bustling in the summer, but now it is a ghost town. I try to see the beauty and imagine this place in the summer, but I feel like the combination of the bad weather and the off season makes experiencing what John describes impossible.



After a tour of Lake Roosevelt and Vagen Lumber, one of the town's three thriving industries, he drops me off at Benny's Colville Inn. A comfortable and modest place to stay for business travelers as well as outdoor adventurers passing through, Benny's has a lobby that is a monument to outdoor

Undiscovered Washington

Colville

sportsmen. Every wall is adorned with prized trophies from past hunting and fishing adventures.



I head to dinner at the Four House, where I will have an opportunity to see that familial connection John mentioned. Opened in April of 2017, the Four House, a family-friendly pub and restaurant, is owned and run by Julie and Zack Gibbons along with Julie's mother, Susan Linn. The entire family is working tonight, greeting the incoming stream of guests as if they are part of the family. Julie, busy making food, pulling pints, and attending to her two small children, is nevertheless able to make time to talk with me about Colville. It is a place where a "handshake still means something," she says. "People are happy here. You can take a deep breath and feel like you are on vacation all the time."



As I am heading back to Benny's, a wooden door on Main Street catches my eye. The sign above advertises craft

cocktails. I'm intrigued. This does not look like a place you would find in Colville. I open the door and head down a narrow set of stairs to Dominion Distillery, a micro-distillery and speakeasy-esque cocktail bar. There I meet owner Tom Winney, his wife Robyn, and bartender/assistant Tom Iverson. Tom shows me his handmade still and, as we chat over samples of single malt vodka and Apple 151, he offers to take me into the mountains and lakes on his ATV. We could hunt and fish, he says.

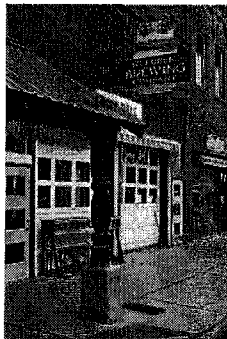
When I tell him that I'm leaving early the next morning, he looks a bit disappointed, and I am too. I would love to do this. To be able to experience this place as it is meant to be experienced.

Tom tells me it is an open invitation and, as I head back to my hotel, I am reminded of something John said to me earlier in the day: "If you come here once, you will come back."

I think he is right.

Undiscovered Washington

Republic



December 2, 2017 - REPUBLIC, WA - Having successfully crossed Sherman's Pass on Highway 20, I stop at Sparky's Cafehouse to meet with some of the colorful and diverse locals here in Republic.

Jim Milner, the Chamber of Commerce president, moved here from Portland in 2004 after he became sick of the crowds and the noise. He quickly fell in love with the scenery, the forests, the mountain, and the lakes that surround Republic. "It is isolated, but has a good mix of resources," he says.

Living is pure here. "We have all you can't see, water you can't taste," he says.



Katherine Mead is the Director of Stouffer Interpretive Center and Lucene Fossil Site. She talks about the independent spirit of this town. Her eyes tear up as she tells me how Republic is made up of people who are from opposite

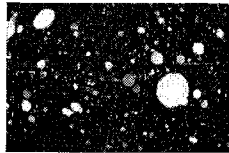
sides of the political and cultural spectrum, but always come together as a community to support each other.

Emily Burt, who owns Republic Brewing, tells me how connected this place is to the outdoors. Her favorite time of year is fall, when the tamaracs turn yellow and the sun shines through them just right. "It makes the sky turn into a spirit jam," she says.

Crystal Strong, owner of Freddie's Gourmet BBQ, tells me that the process of getting here, the long but scenic drive on Highway 20, is part of the appeal. In this hurried day and age, she loves how time is different out here, how it slows down. She calls it Ferry County time.

As I wander, it doesn't take long to be charmed by this old mining town. Several of the original buildings, many of them more than 100 years old, line Clark Avenue. Republic is the real deal. No fake tourist borders, no chain stores, it feels like I have stepped back in time, like I am a lone traveler in some Western movie rolling into an isolated frontier town.

It is getting late and starting to snow and I have a 20-minute drive to K Diamond K Ranch ahead of me. After I finish my beer at Republic Brewing, I decide to call it a night and head out of town.

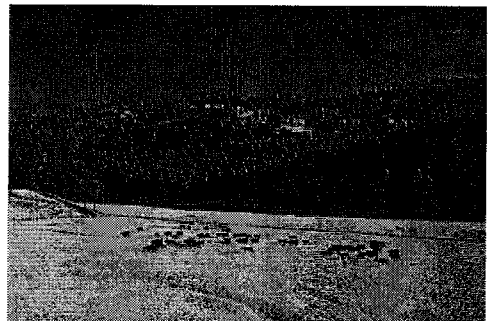


Kathy McKay, the owner of K Diamond K, spots me as I walk in. "You must be Adam. Welcome." She then tells me to "take any room I want up there," and points to a staircase made out of split logs with hunchboxes embedded in the steps. A working dude ranch, K Diamond K is on 2,000 acres of ranchland. The lodge, made out of logs peeled by hand, is 16,000 square feet with 15 rooms, a saloon, and two huge fireplaces. Staying there feels more like staying in someone's home because it is. Kathy lives there with her husband and son. When you are there, you are treated like family. Visitors make their own beds and are welcome to help with cooking, ranching, and anything else that might be going on.

When I arrive I find it difficult to tell who works there and who is staying there, but I soon realize those two things are not mutually exclusive. Kathy hands me some Christmas decorations and asks me to help decorate a table for a party K Diamond K is hosting later this evening. Before long, the guests arrive and dinner is served. As the party ramps up in the saloon, the snow continues to fall. Exhausted, I turn in for the night.

Undiscovered Washington

Republic



I wake in the morning to glorious blue skies and a blanket of fresh snow. After coffee and a hearty breakfast of biscuits and gravy, Kathy outfits me with a cowboy hat and boots and, along with the other ranch hands, we head out to feed the chickens, goats, pigs, alpaca, longhorn cattle, and horses.

in a connection with nature and all that lives in it. For those that can relax in a stillness and quiet, it's for the oceans. The independent. The hard-working. The authentic.



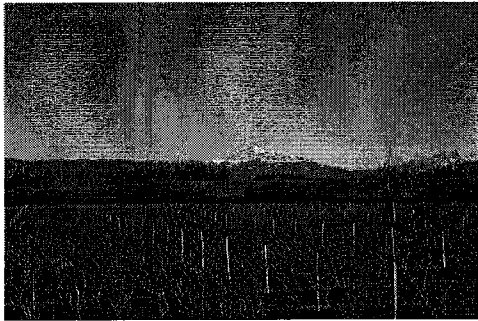
As I watch Kathy and ranch hand Megan Milles interact with the animals with such patience, care, kindness, and love, I am struck by the deep and abiding bond they have with these creatures. Seeing that demonstration of love, combined with the majestic setting, makes for a profound and moving morning.

I pass through Republic on my way home and find myself not wanting to leave. Face the appeal, and I want more. Republic is not for everyone, though, if you crave the comfort of the familiar, it's not for you. If you need to be entertained, it's not for you. Republic is for those who expect nothing other than to enjoy the journey. For those that can find peace



Undiscovered Washington

Lynden



December 6, 2017 - LYNDEN, WASHINGTON - As I drive down Lynden's Front Street, dotted with quaint buildings inspired by Dutch architecture, I can sense the vibrancy of this town located just five minutes south of the Canadian border. Lynden itself is surrounded by miles of fertile farmland. Raspberry, blueberry, and strawberry fields dominate the landscape. Beyond the farms, to the west, lie the waters of Puget Sound. To the east, the North Cascades. Both are within 50 miles.



According to Terri Treat, the owner of the newly renovated Lynden Inn, this small town of 12,000. In addition to being the home of Lynden Transport, is also a key part of the region's billion-dollar agribusiness. As such, the town sees a lot of business travelers. It also attracts leisure travelers, people visiting relatives in Bellingham, or simply couples looking for a quiet, relaxing getaway. This is why, when she had the opportunity to buy a building in the center of downtown, she jumped on the opportunity to open this contemporary.

35-room hotel with large windows overlooking Front Street, with exposed beams, brick, and concrete at every turn.

Terri tells me that regardless of the reason people come here, most fall in love with Lynden. The friendly beaches, bicycles. It is a place where you can leave the car behind. Restaurants, coffee shops, charming antique stores, and even a roller rink are all within walking distance.

I decide to experience this for myself, and head out on foot to Front Street to explore. Eventually I make my way to James Art Center. Housed in a 1930's era building that was once Lynden's town hall and fire station, the James Arts Center promotes and supports the arts by producing exhibitions and performances, and offering studio space and classes to artists in the community and beyond.

Walking through this building, taking in the art on the walls and poking my head in some of the classrooms and studios, I find myself surprised and impressed that a small town like Lynden is home to an organization that offers such top-notch arts programs and facilities. I ask Cynthia French, director of marketing, about the role the center plays in the community. She doesn't hesitate, "It brings joy, and when you live somewhere with joy, it's a nice place to live."

Undiscovered Washington

Bellingham



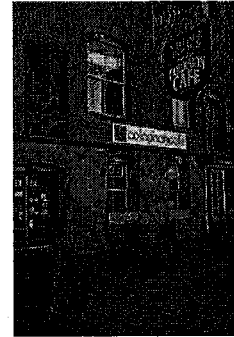
December 6, 2017 - BELLINGHAM, WASHINGTON - By the time I get to Bellingham, it is late in the afternoon. The sun, as it heads closer and closer to the horizon, beckons me to the water's edge and Boulevard Park. At this time of day, the park is filled with bikers, runners, and walkers all enjoying the last bits of daylight.

I make my way to Fairhaven Historic District, a charming Bellingham neighborhood filled with classic old buildings, restaurants, and shops. I check into the Fairhaven Village Inn, head up to my room, and catch a glimpse of the sun disappearing over the bay.

Over a glass of Malbec, lamb stuffed tomatoes, and risotto at FAT, Annette Bagley, director of marketing for Bellingham, tells me what she loves about the city, what makes it unique. She says its proximity to both the waters of Puget Sound and Mount Baker make Bellingham a perfect place for people who love the outdoors. The annual Shi to Sea relay race, which combines legs of downhill skiing, cross-country, running, biking, canoeing, and kayaking, is a perfect representation of all the different outdoor activities that Bellingham offers.

She explains that in addition to it being an outdoor mecca, Bellingham is also home to Western Washington University. She tells me that the influence the University has on Bellingham is significant. It makes the community youthful. Lots of energetic, talented, entrepreneurial, and creative young people choose to live here, which makes Bellingham smart. The fact that Western is home to high-level faculty and smart, curious students means that, as a community, Bellingham is thoughtful, discerning, and progressive. She

cites the many art galleries, book stores, theaters, and the Smithsonian-accredited Whatcom Museum as examples of how an intellectually curious outlook has permeated the city's culture.



Undiscovered Washington

Bellingham

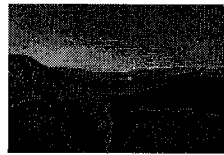


The next morning, at sunrise, I head out to South Bay Trail, which juts out into the Puget Sound. As I look over the water, I think about how much Seattle has changed over the past couple of years, and how that change has come at a price. I think about the obvious similarities between the two cities and wonder if Bellingham is following in Seattle's footsteps.

Then I'm reminded of something Annette said to me last night as we were finishing up dinner. "Bellingham is still far enough away that it is its own little world."

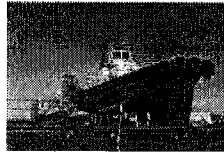
Undiscovered Washington

Anacortes



December 2, 2017 - ANACORTES, WASHINGTON - "We are an authentic maritime town, and we've been discovered by the boating community," Mayor Louise Gere tells me as we sit in her office, looking at a huge map of Anacortes spread out on a conference table.

She tells me that Anacortes and the people that live here have always had a strong connection to the sea. It's a working waterfront town that was built by generations of fishermen and ship builders. Today, a balance of recreational boaters, whale-watching charters, and shipbuilding keep the connection to the sea alive and strong. The taxes from whale watching, moorage, provisioning boats, and lodging pumps money into the community, and the salt water recreation breeze coming off the Salish Sea has a profound impact on the people.



"Salt air is breath, it is life," Mayor Gere tells me.

She tells me how the people here are creative, engaged, and friendly. "They wrap their arms around this community," she says. She describes the 2,000 acres of protected forest land and parks that attract hikers and bikers. She tells me about the fantastic restaurants, bookstores, and shops downtown, all within walking distance. She invites me to "go out and discover my city," and I do.

I talk to Steve Aggregard, owner of Island Adventures. He tells me that the calm conditions, scenic backdrop, and diversity of whales makes Anacortes one of the best places to go whale watching. As he shows me around his brand-new high-speed Catamaran with three viewing levels, he tells me that the ability to go fast is important because it means more



time going slow once they find whales. I ask him what the best part of his job is. He tells me that there are only a handful of days in one's lifetime that are truly unforgettable. Births, deaths, marriages, graduations. He says that seeing a whale in the wild for the first time is one of those handful of days, and it is gratifying for him to provide that experience to people.



As I continue to explore Anacortes, I discover that Pelican Bay Books and Coffeehouse rivals Elliott Bay Books back home in Seattle. I discover that browsing the aisles at Marine Supply and Hardware is like traveling back to another era. I discover that, with its welcoming spirit, rustic atmosphere, and great selection of beers, it's fortunate that the Browns Lantern is not in my neighborhood, because I would probably never leave. I discover that the food at A-Town Bistro is as good as anything I've eaten in Seattle. I discover that sunset look

Undiscovered Washington

Anacortes



Different at the tip of Cap Sante Park, when you're perched 300 feet above the water and have a 360-degree view.

And I discover that what might be hidden to one person may well be obvious to someone else. I had always thought of Anacortes as a town you pass through on your way to the Canadian or American San Juan Islands. I never thought there would be any reason to stay. I now know different.

Undiscovered Washington

San Juan Island



December 7, 2017 - SAN JUAN ISLAND, WA - The ferry ride from Anacortes to San Juan Island is transforming. You have to give up control. You can't go faster. There is no shortcut. You have no choice but to slow down and observe. You arrive slowly, methodically. The ferry ride is a pause that allows you to enter island life.

The first people I meet on the island are Don and Pete. Husband and wife, they run a whale-watching outfit and sea kayaking company, and manage vacation properties across the island. Erin grew up here, and Pete's dad was a fisherman. In 2006, while living in Burlington, they both felt the pull of this island. When an opportunity to open a business here arose, they did not hesitate to come back. They tell me that living here is filled with beauty, peace, and calm. "There is nothing better than sitting on South Beach with your back up against driftwood, tossing rocks into the water over and over again," Pete tells me.

I meet Bruce Conway, a book designer who has lived on the island for over 30 years. Drawn to the natural beauty of the island and the independence of island life, he refers to the surrounding waters as a moat that separates the island from the rest of America. He tells me that, in many ways, San Juan Island does not feel like it is part of the United States. The people on the island are close. They have to be, because they rely on each other. He explains that the island is an enlightened place because it combines a politically progressive nature with an abundance of nature. "It's almost like Athens was... a great community," he says.

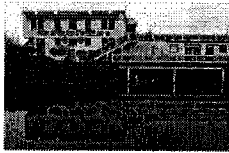
Kari Kaski is a distiller at San Juan Distillery and Westcott Bay Cider. She makes gins, brandies, and fruitciders that incorporate

local ingredients, creating products that are connected to the land. When you taste them, they evoke a sense of place. "It tastes like the island smells," she remarks as I try the gin. I have to agree. Being so close to nature and its wildlife helps her "connect to life right now." In my conversation with her, it is obvious that her ability to perfectly capture the island's essence in a bottle is only possible because of her deep connection to this place.



Undiscovered Washington

San Juan Island



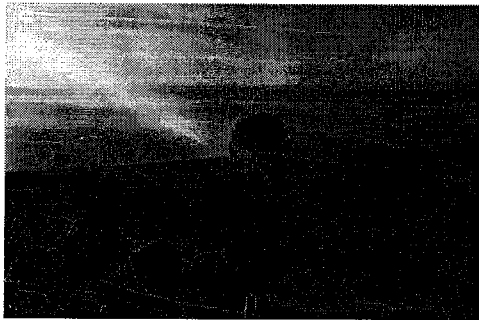
After waking up to Roche Harbor, I head back to Friday Harbor. I'm waiting in line to get on the ferry that will take me back to the mainland. It is a brilliantly sunny morning, and I make eye contact with a woman walking toward her car, having just picked up a cup of coffee. She smiles. I smile back and we strike up a conversation. Tamara moved here eight years ago from Lake Tahoe, looking to escape the crowds of California. She traveled around the United States looking for a place to call home and vividly recalls arriving at Friday

Harbor for the first time. She says she knew right away. "This is it, this is home," she said. She could feel the magic of this place stir her soul.

As we make our way to the ferry, I tell her about my experience "on island" and she encourages me to come back in the summer, to see it at a different time of year.

"Now you've got a friend on San Juan Island," she says.

Magical. Enlightened. Stunning. Enthralling. Awe-inspiring. Avalon. Everyone I met spoke of this place in these sweeping, grandiose terms. And I have to say, after being confronted with stunning views after stunning views as I drove around the island, it's hard to argue. And on my last night, standing totally alone in San Juan Island National Historic Park at sunset, with a vast meadow spread before me and the Haro Strait below, I realized that seeing something beautiful and being completely surrounded by beauty are two very different things. When you are surrounded, it seeps into you. It becomes a part of you, and you become a part of it. That's the magic of San Juan Island.



lux
insights

**WASHINGTON STATE TOURISM
QUANTITATIVE RESEARCH**
January 18, 2018

OBJECTIVES

Support Washington Department of Commerce Tourism's ability to increase tourism to rural areas and tourism-dependent areas, and in adventure and outdoor recreation.

Specific objectives include:

- Identifying the type of visitors who are interested in visiting Washington State
- Creating benchmarks going forward, (e.g. measuring "share of state")
- Measuring awareness and interest levels of regions throughout the state
- Identifying potential barriers and other competitive travel options they may be considering
- Identifying key drivers and motivations for visiting Washington State

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WHO WE SPOKE TO

To qualify for the study, respondents had to meet the following criteria:

- Resides in Arizona, British Columbia, California, Colorado, Texas or Oregon
- Primary or shared decision makers for planning and booking travel
- 18/21+ years old
18+ in Canada and 21+ in USA
- All genders represent a mix of males and females
- Past or potential visitor stayed overnight in WA in the P2 years, or interested in taking an overnight trip to Western US/Canada in the P2 years
- Takes overnight leisure trips at least once every 2 to 3 years

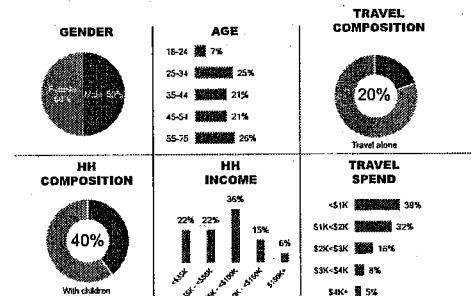
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METHODOLOGY

- DATE**
A 15-minute online survey was fielded from December 11-21.
- AUDIENCE**
We spoke to 1,404 respondents.
 - They represented 6 different states/provinces.
 - Responses were weighted by gender, age and market.
- MARGIN OF ERROR**
We have a margin of error of ±2.6%.

Please note, margin of error increases when the base size decreases.

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S11. What is your gender? S12. In what year were you born? S13. On your next overnight trip that is outside the Western US or Western Canada, approximately how much are you likely to spend on the trip? S14. Including yourself, how many others typically travel with you when going on an overnight personal trip within the Western US or Western Canada? S15. Which of the following best represents your household? Total = 1,404/EE. Which of the following best represents your total annual household income before taxes? Total, including those who prefer not to say = 1,349/EE.

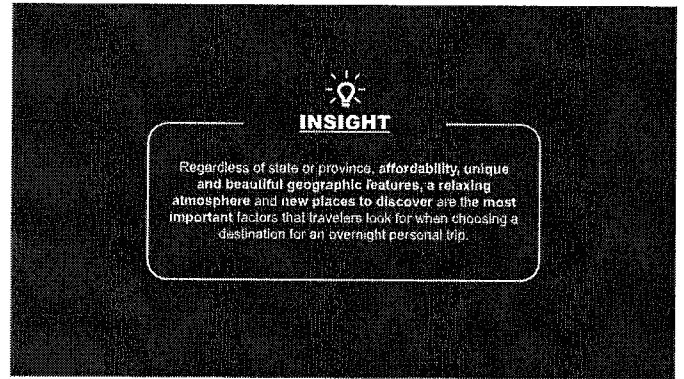
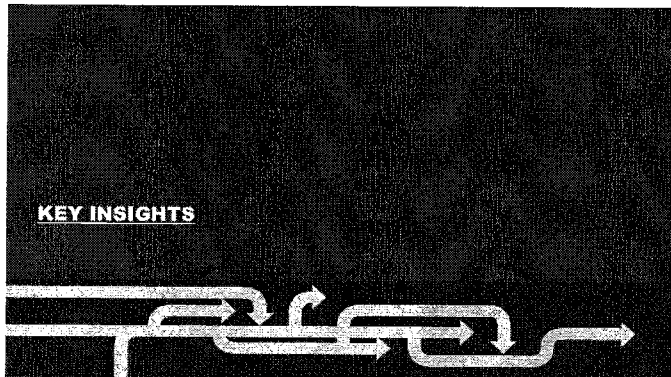
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ACTION GRID

As part of the analysis, Washington States' strengths and weaknesses were visually mapped with an action grid. To interpret the grid, please use the following:

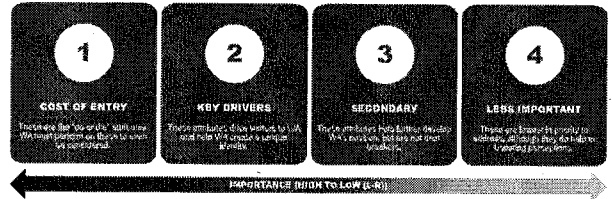
<p>PRIMARY WEAKNESSES</p> <p>Top priorities to address as they matter to travellers but Washington State performs weaker on them.</p>	<p>PRIMARY STRENGTHS</p> <p>Must be leveraged as they are important to travellers and Washington State performs well on them.</p>
<p>SECONDARY WEAKNESSES</p> <p>Lower priority and should be addressed only if no primary weaknesses exist.</p>	<p>SECONDARY STRENGTHS</p> <p>Potential differentiators for Washington State and are secondary motivators for travellers.</p>

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DECISION CRITERIA – THE TIERS

For the next few slides, we have used the following tiers to rank the importance of various attributes travellers consider when choosing a destination in the Western US or Western Canada for an overnight personal trip.



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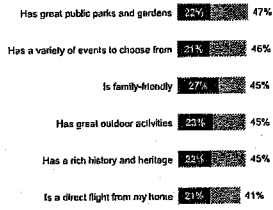
DECISION CRITERIA - THE ATTRIBUTES TESTED

Is affordable to travel to	Is family-friendly
Has unique and beautiful geographic features	Has a rich history and heritage
Offers a very relaxing atmosphere	Is a direct flight from my home
Has new places to discover that I have never been before	Offers local activities
Is a place that has done its best to preserve its natural state	Has a large selection of stores, malls and districts to shop at
Is known for food and restaurants	Is within driving distance from my home
Has great public parks and gardens	Is a romantic getaway for couples
Offers cultural activities	Has excellent wineries and/or breweries/distilleries
Has a variety of events to choose from	Has a vibrant nightlife
Has great outdoor activities	

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DECISION CRITERIA

Showing top 2 box % ■ 7 - Very Important ■ 6

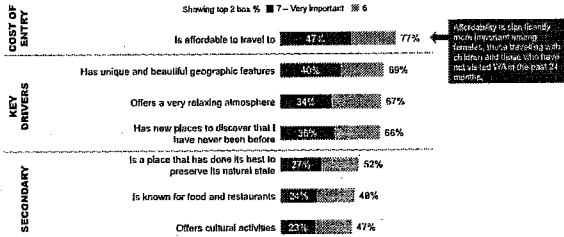


SECONDARY

B1. How important are the following to you when choosing a destination for an overnight personal trip in the Western US or Western Canada? Please use a scale where 1 is not at all important and 7 is very important. Total = 1,000%
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DECISION CRITERIA

Showing top 2 box % ■ 7 - Very Important ■ 6

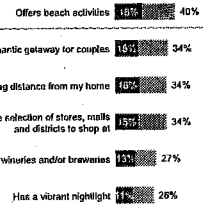


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DECISION CRITERIA

Showing top 2 box % ■ 7 - Very Important ■ 6

SECONDARY



LESS IMPORTANT

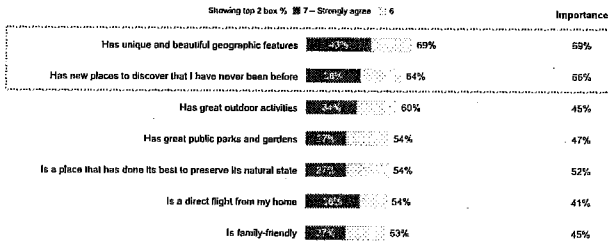
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INSIGHT

Washington State's key strengths lie in its unique and beautiful geographic features, and the fact that it is largely undiscovered. These two attributes are highly important to potential travelers and perform at a high level for WA.

Slide 1 of 3

WASHINGTON'S PERFORMANCE

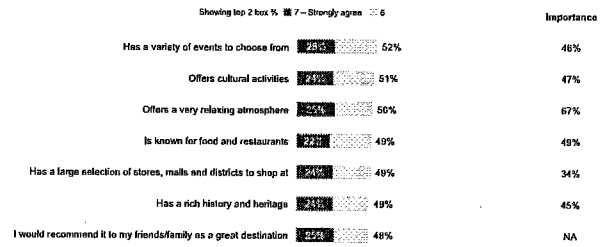


R3. Based on what you have seen, heard or read, please tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 7 is strongly disagree and 1 is strongly agree. Total = 1,406.

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Slide 2 of 3

WASHINGTON'S PERFORMANCE

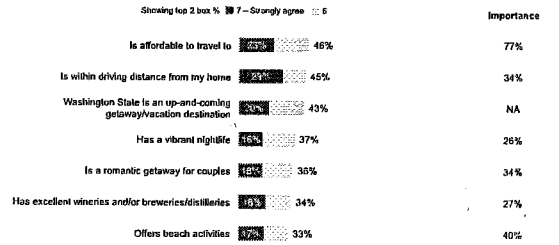


R4. Based on what you have seen, heard or read, please tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 7 is strongly disagree and 1 is strongly agree. Total = 1,406.

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Slide 3 of 3

WASHINGTON'S PERFORMANCE



R5. Based on what you have seen, heard or read, please tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 7 is strongly disagree and 1 is strongly agree. Total = 1,406.

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"Washington is one of those states where you can travel to different parts of it and it all changes. If you want the ocean you're one hour away, [or if you want to go to the] desert you're [now at] the desert. It's just a beautiful state."

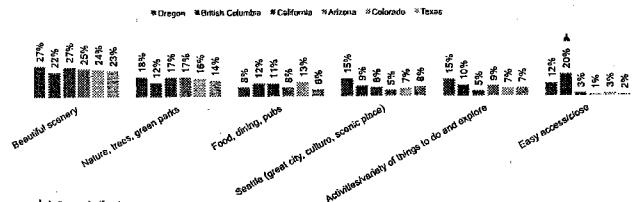
"The diversity of its landscape (e.g. bustling, big cities along with lots of natural outdoor beauty and adventures). I've heard that the food is good, and the state is great for exploration."

"It has beautiful parks like Mt. St. Helens National Park. It is within an easy driving distance from my home in Oregon. It has Seattle, one of my favorite cities to visit with its shops, restaurants, museums and Pike Street Market."

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BEST THINGS ABOUT WASHINGTON (UNAIDED) BY MARKETS

Showing mentions 5% or higher based on total. Order is shown based on ranking among total.



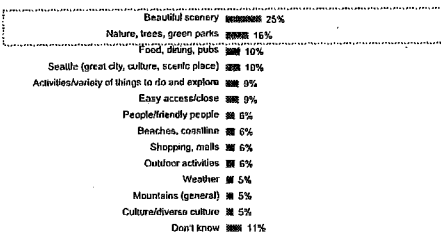
▲ Indicates significant differences among markets

82. Based on what you have seen, heard, read or did, what are the best things and worst things about Washington State as a potential trip destination? Total = 1,406. Base for market sizes = 209-254

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BEST THINGS ABOUT WASHINGTON (UNAIDED)

Showing mentions 5% or higher

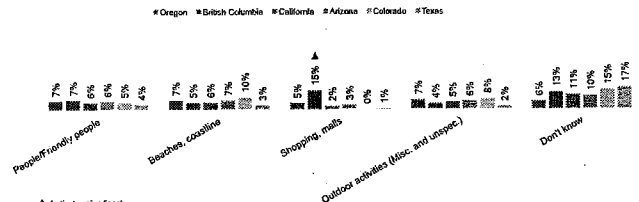


82. Based on what you have seen, heard, read or did, what are the best things and worst things about Washington State as a potential trip destination? Total = 1,406.

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BEST THINGS ABOUT WASHINGTON (UNAIDED) BY MARKETS

Showing mentions 5% or higher based on total. Order is shown based on ranking among total.



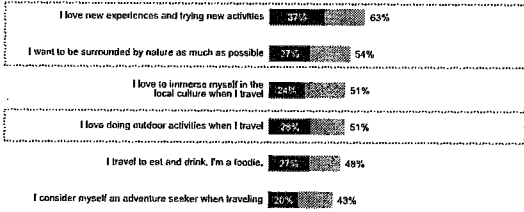
▲ Indicates significant differences among markets

82. Based on what you have seen, heard, read or did, what are the best things and worst things about Washington State as a potential trip destination? Total = 1,406. Base for market sizes = 209-254

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ATTITUDINAL STATEMENTS

Showing top 2 box % ■ 7 - Very Important 6



E1. The following are some statements about how you may personally feel of on traveling for an overnight personal trip. Please use a scale where "1" is strongly disagree and "7" is strongly agree. Total = 1,406

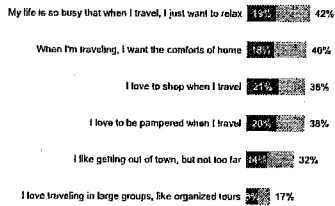
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INSIGHT

Key weaknesses however, lie in perceptions of affordability and that it is not yet seen to offer a relaxing atmosphere. These two attributes are very important, but perform lower for WA State.

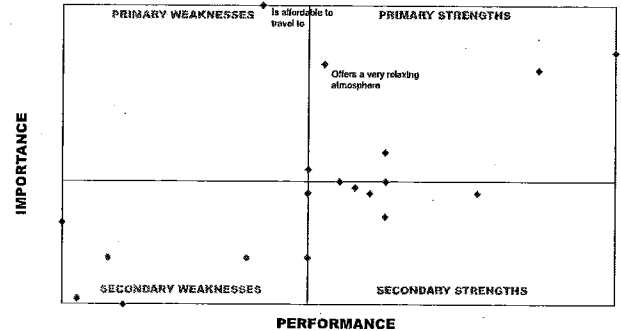
ATTITUDINAL STATEMENTS

Showing top 2 box % ■ 7 - Very Important 6



E1. The following are some statements about how you may personally feel when traveling for an overnight personal trip. Please use a scale where "1" is strongly disagree and "7" is strongly agree. Total = 1,406

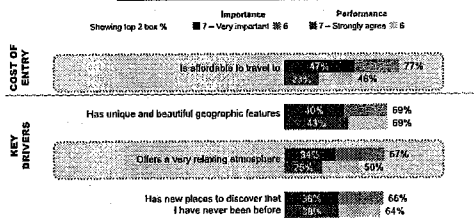
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E2. How important are the following to you when choosing a destination for an overnight personal trip in the Western US or Western Canada? (E1). Based on what you have seen, heard or read, please tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where "1" is strongly disagree and "7" is strongly agree. Total = 1,406

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IMPORTANCE AND PERFORMANCE



"The big cities are very condensed, heavy traffic."

"Suuuuper expensive in the big cities (aka Seattle). That would deter me from planning a long vacation in Seattle since food and hotels would be so expensive."

"I don't know of anything I want to see in Washington."

"The only thing I can think of about Washington that I'm not particularly fond of is the amount of rain, I hear it rains all the time in Seattle."

B1. How important are the following to you when choosing a destination for an overnight personal trip to the Western US or Western Canada? B3. Based on what you have seen, heard or read, please tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 1 is strongly disagree and 7 is strongly agree. Total = 1,406.

B2. Based on what you have seen, heard, read or felt, what are the best things and worst things about Washington State as a personal trip destination? Total = 1,406.

IMPORTANCE AND PERFORMANCE BY MARKETS

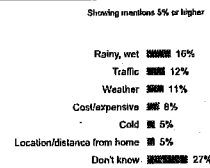
Showing top 2 box %

Importance	Oregon	British Columbia	California	Arizona	Colorado	Texas
Is affordable to travel to	80%	78%	75%	76%	69%	70%
Has unique and beautiful geographic features	72%	68%	67%	71%	76%	69%
Offers a very relaxing atmosphere	85%	85%	71%	72%	84%	80%
Has new places to discover that I have never been before	67%	61%	62%	69%	72%	71%

Performance	Oregon	British Columbia	California	Arizona	Colorado	Texas
Is affordable to travel to	55%	51%	42%	40%	30%	33%
Has unique and beautiful geographic features	75%	65%	67%	73%	71%	65%
Offers a very relaxing atmosphere	89%	75%	56%	52%	49%	51%
Has new places to discover that I have never been before	66%	68%	65%	66%	63%	63%

Base: 200 207 200 203 200 200

WORST THINGS ABOUT WASHINGTON (UNAIDED)



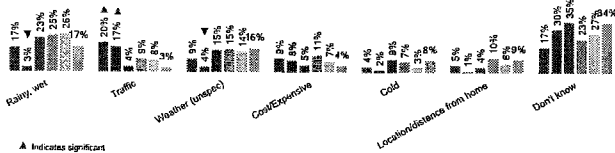
B1. How important are the following to you when choosing a destination for an overnight personal trip to the Western US or Western Canada? B3. Based on what you have seen, heard or read, please tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 1 is strongly disagree and 7 is strongly agree. Total = 1,406.

B2. Based on what you have seen, heard, read or felt, what are the best things and worst things about Washington State as a personal trip destination? Total = 1,406.

WORST THINGS ABOUT WASHINGTON (UNAIDED)

Showing mentions 5% or higher based on total.
Order is shown based on ranking among total.

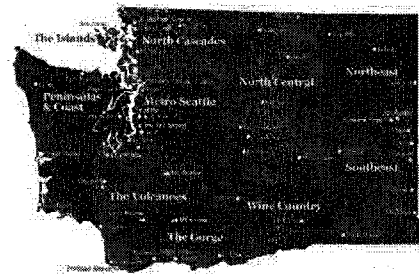
Legend: Oregon, British Columbia, California, Arizona, Colorado, Texas



▲ Indicates significant difference among markets

Q2. Based on what you have seen, heard, read or did, what are the best things and worst things about Washington State as a personal trip destination? Total = 1,000. Base for markets varies = 200-250.

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INSIGHT

Drive visitors outside of Seattle for more affordable and relaxing experiences, specifically to the Volcanoes, Islands and Peninsulas & Coast.

They are key untapped areas due to high interest but low awareness from visitors.

VISITATION INTEREST

Showing top 2 box % (7 = Very Interested) 0

Awareness

Area	Very Interested (%)	Awareness (%)
Metro Seattle	73%	72%
The Volcanoes	67%	45%
The Islands	65%	26%
Peninsulas and Coast	64%	37%
The Gorge	54%	39%
North Cascades	50%	33%
Wine Country	48%	28%
Northeast	41%	37%
North Central	38%	17%
Southeast	31%	11%

RS. Are you interested visiting (or to visit) the following areas of Washington State for an overnight personal trip? Please circle a value from 1 to 7 (1 is not at all interested and 7 is very interested). Among those who need that interest in visiting Washington State a 5, 6 or 7 = 90%, / 91. Which of the following areas in Washington State have you seen, read, heard or experienced before today? Total = 1,000.

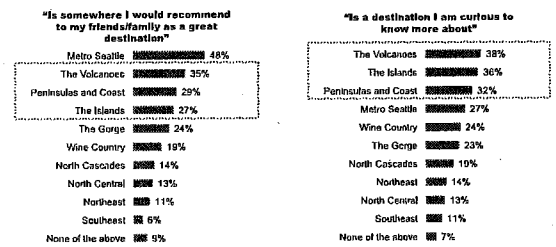
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VISITATION INTEREST BY MARKETS

	Total	Oregon	British Columbia	California	Arizona	Colorado	Texas
Metro Seattle	75%	71%	77%	73%	72%	72%	72%
The Volcanoes	67%	64%	60%	66%	71%	80%	70%
The Islands	65%	69%	63%	60%	68%	65%	68%
Peninsulas and Coast	64%	62%	67%	59%	74%	69%	64%
The Gorge	54%	49%	51%	50%	54%	53%	52%
North Cascades	60%	38%	56%	64%	58%	49%	55%
Wine Country	49%	44%	51%	45%	49%	48%	56%
Northeast	41%	27%	41%	51%	53%	38%	51%
North Central	34%	36%	38%	40%	37%	27%	34%
Southeast	31%	23%	28%	38%	39%	28%	39%
Base	840	190	140	181	152	160	147

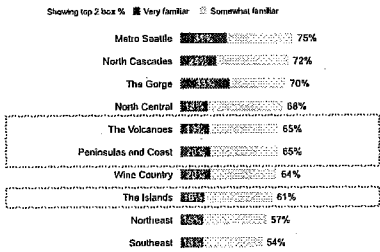
▲ Indicates significant differences among markets
 B6. Are you interested in visiting the following areas of Washington State for an overnight period? Please use a scale where "1" is not at all interested and "7" is very interested. Among those interested that interest in visiting Washington State is 5, 6 or 7 = 100%
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PERFORMANCE



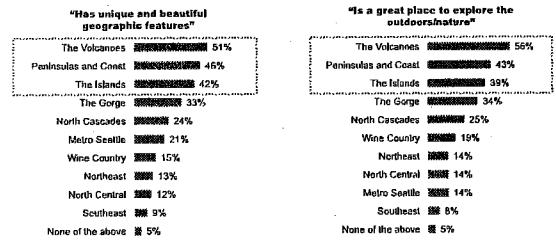
C1. Please identify which Washington State areas, if any, you associate with the following statements. You may choose as many or as few areas for each statement. Total = 1,000%
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FAMILIARITY



B5. How familiar would you say you are with each of the following areas in Washington State? Among those aware of each region. Base: n=127,943.
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PERFORMANCE



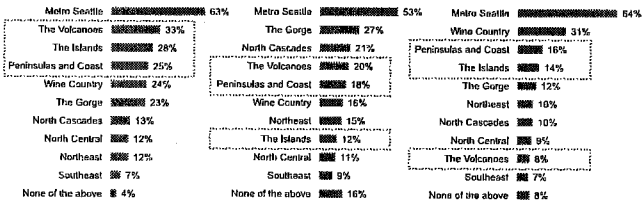
C1. Please identify which Washington State areas, if any, you associate with the following statements. You may choose as many or as few areas for each statement. Total = 1,000%
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PERFORMANCE

"Seems like a popular place to travel to"

"Is easy for me to get to (relatively hassle-free)"

"Offers unique food and beverage experiences"



CI: Please identify which Washington State area, if any, you associate with the following statements. Your rating ranges on a scale of 1 to 7 for each statement. Total = 1,000%.
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INSIGHT

After addressing the cost of entry and key drivers, consider leveraging food and dining as they are important to travelers and Washington performs well on them.

We've seen how important these are in tourism trends in the past few years. They are becoming an expectation.

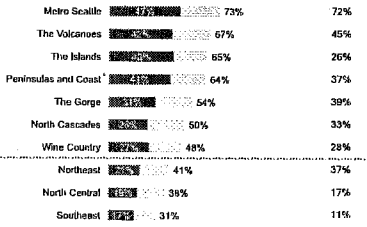
VISITATION INTEREST

Showing Top 2 Low % ■ 7 - Very Interested ■ 6

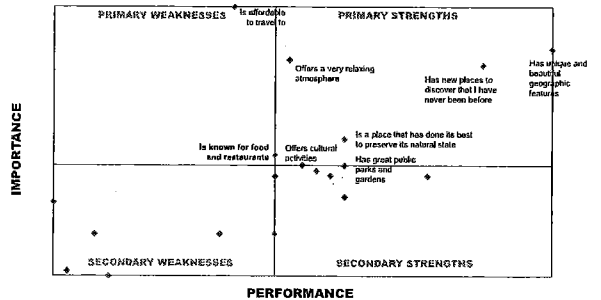
Awareness

Given how much dining options to be found in the Northwest, North Central and Southwest could be doing by emphasizing restaurant and dining options that you can't find elsewhere.

Your region has greater awareness by changing perceptions of these regions and showcasing its diversity.



BI: How important are the following to you when choosing a destination for an overnight personal trip in the Western US or Western Canada? Please use a scale where 1 is not at all important and 7 is very important. Total = 1,000. BI: Based on what you know about each of our places tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 1 is strongly disagree and 7 is strongly agree. Total = 1,000.
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BI: How important are the following to you when choosing a destination for an overnight personal trip in the Western US or Western Canada? Please use a scale where 1 is not at all important and 7 is very important. Total = 1,000. BI: Based on what you know about each of our places tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 1 is strongly disagree and 7 is strongly agree. Total = 1,000.
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ATTITUDINAL STATEMENTS

Showing top 2 box % ■ 7 - Very Important ■ 6

I love new experiences and trying new activities ■ 37% ■ 63%

I want to be surrounded by nature as much as possible ■ 27% ■ 54%

I love to immerse myself in the local culture when I travel ■ 24% ■ 51%

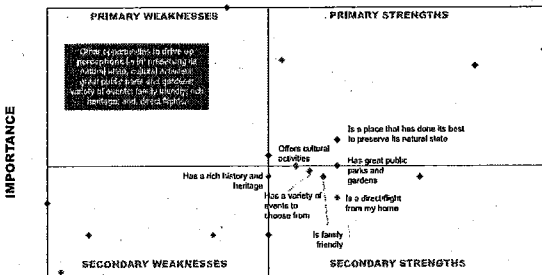
I love doing outdoor activities when I travel ■ 23% ■ 51%

I travel to eat and drink, I'm a foodie. ■ 27% ■ 48%

I consider myself an adventure seeker when traveling ■ 20% ■ 43%

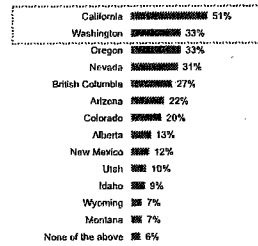
E4. The following are some statements about how you may personally feel when traveling for an overnight business trip. Please use a scale where 1 is strongly disagree and 7 is strongly agree. Total = 1,404
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In Western USA and Canada, California is Washington's strongest competitor given high past and future visitation.



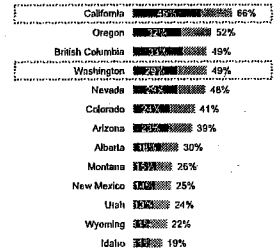
E5. How important are the following to you when choosing a destination for an overnight personal trip to the Western US or Western Canada? Please use a scale where 1 is not at all important and 7 is very important. Total = 1,404. Based on what you have seen, heard or read, please tell us how much do you agree or disagree with each of the following statements about Washington State. Please use a scale where 1 is strongly disagree and 7 is strongly agree. Total = 1,404.
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PAST VISITATION



FUTURE VISITATION

Showing top 2 box % ■ 7 - Very Interested ■ 6

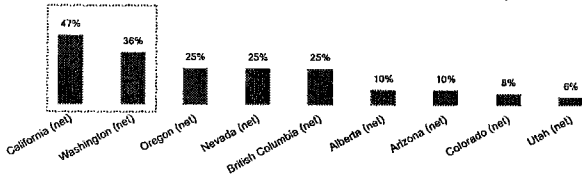


E5. In the past 24 months, which of the following states and/or provinces have you visited for a personal trip where you stayed for at least one night? Please indicate your own state if you have traveled overnight for a personal trip in the past 24 months. Total = 1,404. E12. And in the next 24 months, how interested are you in an overnight personal trip to the following states and/or provinces? Please use a scale where 1 is not at all interested and 7 is very interested. Total = 1,404.
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TOP-OF-MIND DESTINATIONS BY MARKETS (UNAIDED)

Showing total mentions 5% or higher

When thinking of destinations in the Western US and Western Canada, California floats to the top.

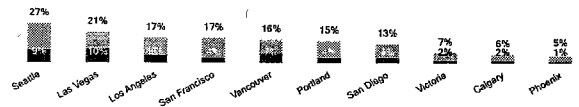


S14. Thinking of Western US and Western Canada, which destination (state, province or area) comes to mind first for your next overnight personal trip? Total = 1,406.
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TOP-OF-MIND DESTINATIONS (UNAIDED)

Showing mentions 5% or higher ■ First mention ■ Other mentions

High mentions of California is driven by destinations such as Los Angeles, San Francisco and San Diego.

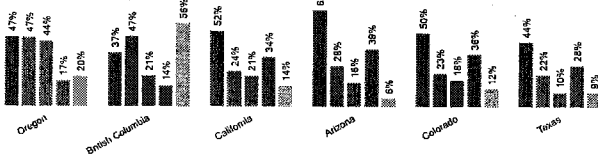


S14. Thinking of Western US and Western Canada, which destination (state, province or area) comes to mind first for your next overnight personal trip? Total = 1,406.
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TOP-OF-MIND DESTINATIONS BY MARKETS (UNAIDED)

Showing top 5 destinations based on total

Mentions: ■ California (net) ■ Washington (net) ■ Oregon (net) ■ Nevada (net) ■ British Columbia (net)

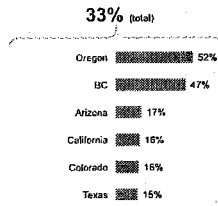


S14. Thinking of Western US and Western Canada, which destination (state, province or area) comes to mind first for your next overnight personal trip? Total = 1,406.
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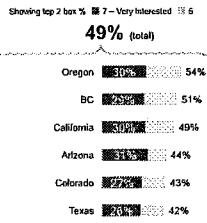
INSIGHT

Washington's lowest hanging fruit are travelers from Oregon, British Columbia and California as 1-in-2 say they are interested in visiting WA in the next 24 months for an overnight trip.

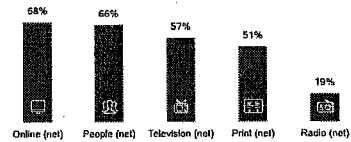
PAST VISITATION TO WASHINGTON



FUTURE VISITATION TO WASHINGTON



SOURCES OF INSPIRATION



E1. In the past 24 months, which of the following states and/or provinces have you visited for a personal trip where you stayed for at least one night? Please include your own state if you have traveled overnight for a personal trip in the past 24 months. E1C. And in the next 24 months, how interested are you in an overnight personal trip to the following states and/or provinces? Please use a scale where 1 is not at all interested and 7 is very interested. Base: n=200206.
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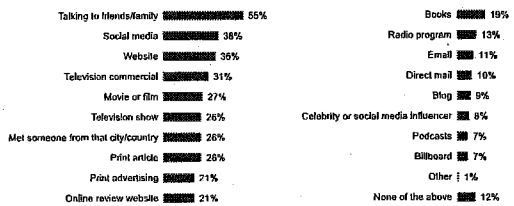
E2. Where have you seen, read, or heard about new destinations that have inspired you to learn more about a destination for an overnight personal trip? Total = 1,034.
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INSIGHT

Talking to friends/family and online sources are powerful and popular ways travellers become aware of new destinations and learn more.

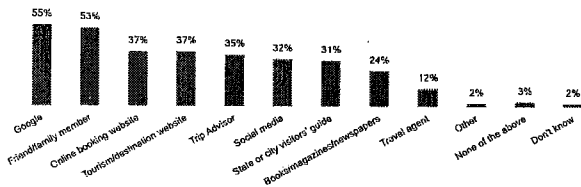
Consider creating a marketing campaign that tap into these sources.

SOURCES OF INSPIRATION



E2. Where have you seen, read, or heard about new destinations that have inspired you to learn more about a destination for an overnight personal trip? Total = 1,034.
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WAYS TO LEARN MORE



E3. Which customer do you typically use to learn more about potential travel destinations for an overnight period trip within the US or Canada? Total = 1,404.
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For more information, please email:
Kiana@luxinsights.com,
Jay@luxinsights.com,
Frank@luxinsights.com and
Victor@luxinsights.com

Glossary

Consideration Set

The subset of brands that a consumer considers as they move toward making a purchase decision. For example, if a person is thinking of traveling to the United States, Washington and California would likely be in their consideration set, and New York and New Jersey would not.

Content

A piece of information that exists to be seen, engaged with and shared. Content can take the form of a blog post, photo, video, social media post or podcast to name just a few.

Customer Journey Map

The steps a consumer usually defined as a person) takes along their path to a purchase decision. Journey maps also define a consumer's behavior after the purchase has been made.

Earned Media

The publicity an organization garners without the use of paid advertising. PR practices specialize in getting organizations this kind of attention.

Media Impression

The measure of one consumer seeing an advertisement or a piece of earned media in any format. The consumer doesn't have to take an action to be counted as an impression.

Channel

In this plan, a channel or marketing channel is defined as any form of media the advertiser could use to expose a consumer to advertising content. A few of channels are: internet banner, social media, television, print, radio and blogs.

Owned Channel

Any channel that could be used for advertising that the organization has direct control over. A blog, social media page or brand website are all examples of owned channels.

Mindshare

The degree to which a brand comes to mind in a particular product or service category relative to its competitors. For example, Ford, Chevy, Honda and Toyota dominate the American mindshare in the automotive industry.

Persona

The fictionalized personification of a set of psychographic and demographic characteristics. Personas make abstract consumer data concrete, helping marketers imagine and internalize an organization's ideal customer. Typically an organization will have several personas. A persona will usually have an associated customer journey map, as they do here.

Psychographics

The study of how consumers think, their attitudes, desires and other psychological characteristics. These data usually are the output of research and are organized into consumer personas.

SEM

Search engine marketing. The practice of promoting websites primarily through paid advertising or keyword buys on search engines like Google or Bing.

SEO

Search engine optimization. The practice of optimizing an organization's web presence to be better seen, understood and promoted on search engines like Google or Bing. This practice does not involve paying the search engine for the better results.

Social Listening

Using AI-enabled software to see, monitor and make sense of trends across social media platforms.

Strategic Differentiation Statement

An internal-facing statement to guide a company in developing marketing materials. To be effective, the statement must distinguish the organization from its competition while addressing a consumer concern or interest.

Tagline

A pithy statement or slogan that communicates a brand's essence to its consumers. "I'm lovin' it" is Mc Donald's tagline.

Theme Line

The unifying idea behind a marketing campaign. This is adapted from the strategic differentiation statement. The difference between the theme line and the strategic differentiation statement is that the theme line may last only for the duration of a marketing campaign whereas the strategic differentiation statement should last for many years.

Traditional Media

The media channels that have existed for generations, like print, radio and television.

White-Space Map

This tool is used to visualize the range of messaging and brand associations that are currently in the market. It reveals branding and messaging opportunities in the market.

