

Washington State Tourism Marketing Plan 2009 / 2010



Presented to Juli Wilkerson, Director

Department of Community, Trade and Economic Development

By the Washington State Tourism Commission

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Washington State Tourism Commission

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Marketing Plan Areas of Consideration

- Washington's Visitor Industry
- Key Travel Trends
- Marketing Plan Response and Priorities
 - Key Strategic Priorities
 - Consumer Marketing Program
 - Consumer Advertising
 - Public Relations
 - Web/Electronic
 - Co-op Marketing Opportunities
 - Fulfillment
 - Travel Trade
 - 2010 Olympics
 - Product Development
 - Research Priorities
- Budget Allocations
- Performance Measurements



Washington's Visitor Industry



Washington's Visitor Base

- The visitor industry in Washington state is significant-just over 52 million traveling parties “chose” Washington in 2006.
- These visitors stayed for an average of 2.4 days, thus generating approximately 123 million visitor days within the state.
- Many of these visitors experienced Washington on a repeat basis; the average visitor took 4.2 trips within the state that year.
- While these volumes are impressive, it should be recognized that over half of these visitors experienced Washington as a day trip. A significant portion of these day trips are generated by Washington and Oregon residents, as well as residents of British Columbia. If even a moderate level of current visitors could be influenced to shift to a multi-day experience, significant new spending could be generated.

2006 Washington Visitor Data

- ***52 million visitor trips***
- ***Stayed for an average of 2.4 days***
- ***More than half were “day- trippers”***
- ***Average visitor took 4.2 Washington trips per year***
- ***Average party size was 2.9 persons***

Source: Dean Runyan Associates



Geographic Composition of Visitor Base

- In-state residents are a significant component of Washington's visitor base, accounting for 48% of visitor days and 43% of spending.
- Other U.S. residents make up the next highest volume of visitor days, at 40%. Their somewhat higher spending results in their contributing 47% of spending.
- Approximately 85% of these domestic visitors come from the six-state region of Washington, Oregon, California, Nevada, Idaho and Montana.
- International travel volume is dominated by Canada, as the country contributes 95% of international trips, with 94% of these originating in British Columbia.
- Although smaller in number, other international markets spend more and stay significantly longer, thus continue as an important visitor segment.



Orientation of Visitor Base

- Washington visitors staying in hotels and motels are the most important segment for the state in terms of their contribution to annual travel-related spending, as they generate approximately half of all expenditures.
- Although smaller in spending volume, those visitors staying in private homes (many with friends or families), as well as visitors traveling as “day-trippers,” are critical additions to the overall base. These two segments collectively generate spending volumes close to that of lodging-based visitors.
- As future marketing efforts are developed, initiatives directed to maximizing the potential of all of these segments will be important.

Accommodation	Total Visitor Spending (millions)
Hotel/Motel/B&B	\$5,985
Campground	\$563
Private Home	\$2,861
Vacation Home	\$193
Day-Tripper	\$2,354

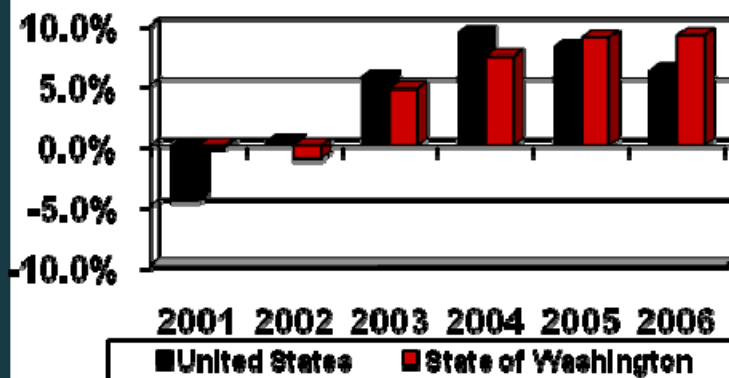
Source: Dean Runyan Associates



Washington Visitor Industry Performance

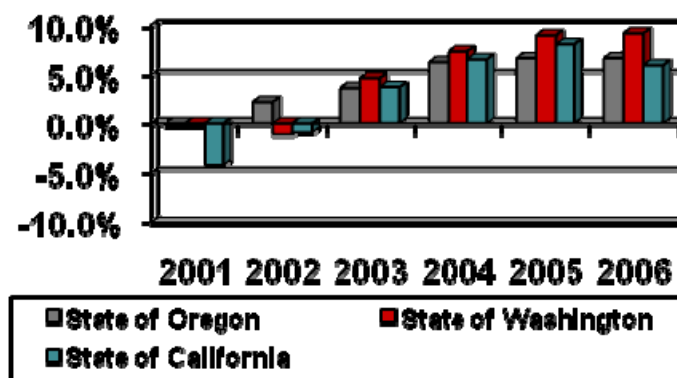
- Washington has grown its direct visitor spending from \$10.5 billion in 2001 to \$13.9 billion in 2006, a 32% increase. To place these growth trends in context, they can be contrasted to national and regional averages.
- Washington's visitor industry was not as negatively impacted after the events of 9/11, and over the past two years, it has grown more rapidly than the national average.

Direct Travel Spending



Source: Dean Runyan Associates

Direct Travel Spending



Source: Dean Runyan Associates



Washington Visitor Industry Performance

- Since 1993, the state's visitor spending has also grown more rapidly than in the Pacific states of Oregon and California; thus Washington has increased its market share among these regional competitors.
- All regions of the state have benefited from this recent growth, with the non-King County regions of the state actually growing at slightly greater rates than other regions over the 2000 to 2006 time period.
- The seasonal patterns of these visitor expenditures have stayed relatively consistent since the early part of the decade, with the summer/fall months contributing 41% of annual lodging sales, with winter at 27% and spring at 32%.



Key Travel Trends





Key Travel Trends

- **Shorter, More Frequent Trips** - The trend of visitors taking shorter, more frequent trips will continue. This is influenced by escalations in fuel costs, continued challenges with border crossing, and the time constraints of most travelers. The Northwest regional market, including Washington's own residents, will continue to be critical segments. The potential for many in-state residents to choose non-Washington travel options should be clearly understood; increased, integrated efforts with regional DMOs must be expanded to minimize Washington resident travel "leakage."
- **Increasing Canadian Opportunity** - Although Canadian markets have seen significant, favorable shifts in exchange rates, travel from British Columbia is less than half the volume experienced in the early 1990s. Canada's close proximity, alluring exchange rates, and upcoming collaborative opportunities with the 2010 Olympics all enhance the potential of this prospective Canadian market.
- **Visitors Demand Experiences** - Similar to tourist markets in the rest of the nation, visitors traveling to Washington are increasingly demanding deeper travel experiences, and thus the need to link the diverse mix of the state's products to create "uniquely Washington" experiences is critically important. Marketing will play an important role and the broad visitor industry must make it easy for visitors to "consume" these experiences.



Key Travel Trends

- **Washington Can Fulfill Visitor Desires** - When considering an ideal vacation, there are many product areas in which visitors desire more of certain offerings. Based on surveys from the Travel Industry of America, many of these desired areas correlate with WA products (outdoor/nature-based, culinary/wine, history/heritage, etc). The state must increasingly present these offerings in compelling, integrated ways to capitalize on these desires.
- **Visitors Use Enhanced Web Capabilities** - Visitors continue to increasingly use the Web to both help plan and book their trips. It is critical that state and regional DMO sites present integrated approaches and themes, providing the ability to present and feature a much broader range of niche experiences.
- **Geotourism Holds Potential** - Visitors, as well as destinations, are increasingly embracing the principles of geotourism (*tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents*). Given the many attributes that relate to geotourism, Washington holds the potential to be a leader in applying these principals, integrating its cultural heritage and natural experiences with an overlay of sustainability.



Key Travel Trends

- **Increased Efforts in Proactive Product Development** – Nationally, DMOs, led by their state tourism offices, are taking more proactive approaches to product development and enhancement. Marketing will play an important role in these efforts, as many times the opportunity is in serving up existing products in new, integrated ways. Often, by directing product offerings in targeted ways, compelling new “products” can be effectively promoted to various niche segments.
- **Reversing Declining Nature Trends** - Visitors are utilizing nature-based experiences at declining levels nationally, as well as within Washington. As these nature-based products are a key destination driver for the state, broad industry involvement must work to reverse these trends and ensure these experiences resonate with changing visitor desires.
- **The Competitive Bar Rises** - Competition for Washington visitors continues to escalate, with many states possessing much greater resources. In order to maximize the industry’s long-term economic potential, it is critical the visitor industry advocates on its behalf and continues to expand funding to compete. A clear Washington brand identity must also be conveyed to both the visitor industry and prospective visitors to the state.



Marketing Plan Response and Priorities



Key Strategic Priorities

- Expand relationships with existing Washington visitors to maximize long-term customer equity.
- Refine brand identity and use it to motivate new visitation, particularly focusing on the domestic western regional market and British Columbia.
- Increasingly link and integrate key differentiated Washington products to deepen visitor understanding of the state's diverse offerings.
- Develop new initiatives that help engage the visitor and “serve up” unique Washington experiences—use these visitors to help “sell” these offerings.
- Deepen the role of Washington's Web presence as a vehicle to motivate and provide visitors easy access to an integrated Washington experience; engage these visitors through a wide range of Web-based content.
- Maintain ongoing communication regarding the value of the visitor industry to industry participants, state leadership, and the broader resident base.
- Ensure private-sector investment is maximized to fully realize matching-fund requirements of the state's tourism budget.

Audiences and Channel Priorities

- Advertising will primarily focus on out-of-state regional audiences, primarily prospective visitors.
- Public relations and the Web will be the primary vehicles to reach and motivate both existing and prospective visitors.

	Advertising	Public Relations	Web/Electronic
Current Visitors			
In-state	Secondary	Primary	Primary
Other Domestic	Secondary	Primary	Primary
Canadian	Secondary	Primary	Primary
Other International	Tertiary	Primary	Secondary
Prospective Visitors			
In-state	Secondary	Primary	Primary
Other Domestic	Primary	Primary	Primary
Canadian	Primary	Primary	Primary
Other International	Tertiary	Primary	Secondary



Consumer Marketing Program



Advertising/Strategic Priority Integration

- The primary focus will be stimulating new visitation from regional markets.
- Expand reach and motivation to Canadian markets, taking advantage of more favorable currency exchange and 2010 Olympic opportunity.
- Expand co-op opportunities to achieve broad-based statewide participation and secure private-sector statewide investment.
- Migrate from awareness to direct-response orientation, as website enhancements are implemented.



Advertising Objectives

- Current campaign is largely an awareness-based campaign, with a moderate call to action, driving visitors to the Web for travel information and to receive collateral materials.
- For the next biennium, the objective should be looked at in two phases:
 - 2009 objective will maintain focus on promoting destination awareness, primarily within the domestic western region, including British Columbia, with a similar call to action.
 - Expand orientation in 2010, with an increased call to action using enhanced www.experiencewa.com web site and expanded range of collateral materials to stimulate a trip decision.
- Maintain key pillar segmentation, while expanding creative orientation to focus on product linkages aligned with targets—set the stage for Washington products.
- Expand co-op advertising opportunities, maximizing role of advertising in achieving private-sector match.



Washington Brand Evolution

- Washington as a destination currently lacks brand clarity. The state must work to refine and communicate a clear brand statement.
- 2009 will focus on brand refinement in an “evolutionary” rather than “revolutionary” process.
- Broad visitor industry will be involved in process - will require educational efforts to ensure purpose/role of statewide brand is understood, that is more than just a “logo.”
- Additional research will be required to understand how both current and prospective visitors perceive Washington relative to its key competitive set, particularly in relation to key travel motivators.
- Brand solutions must provide broad umbrella that has application around the state, reinforcing the state’s differentiated attributes.
- Ability to integrate with other state agencies should also be a consideration.
- Build cohesive alignment among all communication channels, including but not limited to, collateral, website, travel guide, etc.
- 2010 will begin communication process that builds on new brand identity and drills down to assist integration of brand on regional basis.



Messaging and Target Audience Priorities

- Continue to focus on the Urban Naturalist target as the key audience:
 - Continue using pillar segmentation for theme purposes.
 - Expand integration among segments—demonstrate how they relate to provide “uniquely Washington” experiences.
 - Ensure messaging reinforces “independent spirit” theme.

SEGMENTS/ PILLARS	Urban Explorers	Wine and Culinary Enthusiasts	Watchable Wildlife Adventurers	Active Cruisers	Adventure Travelers
Epicurean Experience	⊙	●		⊙	
Culture of Independence	●	⊙	⊙	⊙	⊙
Scenic Grandeur	⊙	⊙	●	⊙	⊙
All-Access Adventure	⊙	⊙	⊙		●
Coastal Cool	⊙	⊙	⊙	⊙	⊙

Media Strategy

- Print publications in FY2009 will continue a similar focus as in FY2008:
 - Publications that reinforce pillar segments and western region geography.
 - Publications that reach and motivate both in-state and other western region markets, including western Canada.
 - While not providing a specific in-state advertising campaign, “bleed-over” of broader campaign will speak to key Washington-resident targets.
- Consider other vehicles (radio, cable TV, etc) as possible options to broaden reach in 2010.
- 2010 will increasingly evolve to stronger direct-response creative, increasingly utilizing online channels (banners, search, etc).





Increased Focus on Co-op Opportunities

- Expanded co-op opportunities will be critical to achieving private-sector match and maximizing collective resources for CTED.
 - Continue traditional ad co-op opportunities in both 2009 and 2010 – increasingly align with integrated product themes.
 - Expand co-op vehicles to include statewide travel inserts that help achieve both private-sector match and present opportunity to present deeper, integrated stories.
 - Consider nontraditional media spaces, such as in-flight video screens and players, focusing on potential corporate partners as title or episode sponsors.



Domestic and International Public Relations



Public Relations/ Strategic Priority Integration

- Use PR as a key tool in presenting integrated story ideas around pillar and persona themes—expand the depth of Washington itinerary “content,” integrating and collaborating with Web offerings.
- Use both traditional and nontraditional approaches to reach and help ensure both in-state and other domestic markets understand how the diverse range of Washington products can provide “uniquely Washington” experiences.
- Provide international contractors with resources that present messages in ways that resonate with prospective international visitors.
- Deepen connection of CTED with statewide visitor industry to expand integrated thinking and demonstrate effective maturing of industry that merits continued commitment of legislature.
- Educate critical Washington stakeholders about the value and role of tourism in the state’s economy and in enhancing the quality of life of all its residents.



The Foundation— WA News Engine

- News Engine has been designed to serve as a centralized media resource allowing both proactive and reactive responses for the state of Washington.
 - Materials Development
 - Manage press materials and announcements
 - House image library
 - Work with Destination Marketing Organizations (DMOs) to create source materials for stories
 - Media Relations
 - Build master trade and consumer media list
 - Develop/distribute series of tailored story pitches and press releases, coordinated with calendar events
 - Monitor editorial calendars for opportunities
 - Develop “clutter-busting” media mailers to bring five pillars to life for media
 - Conduct desk-side briefings with key media as appropriate
 - Coordinate familiarization tours that will guarantee targeted media experience
 - Integrated Communication
 - Provide content for added-value media opportunities
 - Synchronize with media-buy calendar for outreach to target outlets



Story Pillars — Geotourism Integration

- Present heritage, culture, culinary, natural elements in a holistic manner.
- Focus on truly unique, differentiated aspects of Washington offerings.
- Reinforce sustainability in messaging and product offerings.
- Craft in ways that reinforce community embracement.
- Work in conjunction with other state agencies for unified marketing messaging.

Geotourism Principles as an Overlay

“Tourism that sustains or enhances the geographical character of a place—its environment, culture, aesthetics, heritage, and the well-being of its residents”

Epicurean Experience

Culture of Independence

Scenic Grandeur

All-Access Adventure

Coastal Cool



Message Distribution Channels—National Focus

Urban Explorers	Wine and Culinary Enthusiasts	Watchable Wildlife Adventurers	Active Cruisers	Adventurer Travelers
<p>Reading <i>New York Times, Fast Company, San Diego Union Tribune, Condé Nast Traveler, Sunset, Blueprint, Consumer's Digest, Shape, Men's Health, Entertainment Weekly</i></p> <p>Watching Food Network, Travel Channel</p> <p>Surfing Flyertalk, Fodors.com, Engadget, Flickr, Gadling</p>	<p>Reading <i>The New Yorker, Gourmet, Wine Spectator, Vancouver Sun, Bon Appetit, Sunset, San Francisco Chronicle, Food & Wine, Cooking Light</i></p> <p>Watching Fine Living TV "Simply Wine With Andrea Immer," Top Chef</p> <p>Surfing Vinography, The Pour (NYT wine blog), Veritas in Vino, Winecast</p>	<p>Reading <i>Pacific Northwest Magazine, Idaho Statesman, Budget Traveler, Audubon, National Geographic Traveler, Corvallis Gazette Times, Smithsonian</i></p> <p>Watching Discovery Channel, Animal Planet, MSNBC</p> <p>Surfing SierraClub.org, NWF.org (National Wildlife Federation), TripAdvisor.com</p>	<p>Reading <i>Golf, AARP, Wall Street Journal, Reader's Digest, Arizona Republic, Travel + Leisure, More, Oxygen, Parade, The Oregonian, Boating, Smart Money</i></p> <p>Watching CNN, FOX News, History Channel</p> <p>Surfing CNN.com, Expedia, TripSpot.com, CruiseMates.com</p>	<p>Reading <i>Outside, National Geographic Adventure, Men's Journal, Best Life, Ink, Wired, Grist, New York Times</i></p> <p>Watching ESPN, Outdoor Life Network, Discovery Channel, "Anthony Bourdain," "Daily Show with Jon Stewart"</p> <p>Surfing Twitter, MySpace, Gridskipper, Facebook, LonelyPlanet.com</p>

Message Distribution Channels—In-State Focus

- Washington daily newspapers (print and Web)
- Local radio (including Web)
- Local television stations (including Web)
- Public service announcements (PSA's)
- Statewide business publications
- www.experiencewa.com
- Other state agencies





Nontraditional PR Vehicles

- Expanded vehicles for PR messaging:
 - State lottery system—integrate pillars and personas in statewide, Washington travel-oriented game.
 - Washington State Ferry System—start conversations about how Washington experiences can be communicated in expanded ways to visitors/residents traveling on the ferries.
 - Washington Wine Commission—explore synergies with planned activities and other cross-promotional efforts
 - Expanded distribution efforts for both existing and new Washington trip recommendations—teaming with Historical Society, WDOT, etc.





Story Concepts and Seasonal Timing

Stories will be refined as we progress into 2009/2010, considering response/interest in 2008 with a focus on integration.

	JAN	FEB	MAR	APR	MAY	JUN
EPICUREAN EXPERIENCE	Wine and Food Calendar	Valentine's Day	Cruise	Passport	Cheese Festival	Summer Events
CULTURE OF INDEPENDENCE	Arts Calendar		Cruise	SIFF	Summer Festivals	WA Art Walks
SCENIC GRANDEUR	Eagle Rafting Trips	Spring Break	Waterfalls	Summer Travel	Wildflowers	Easy Scenic Hikes
ALL-ACCESS ADVENTURE	Ski	Spring Break		Kayaking	Summer	Summits
COASTAL COOL	Cruise			Sailing	Banana Belt	Whale Watching
OTHER SEASONAL				Tulips		
	JUL	AUG	SEP	OCT	NOV	DEC
EPICUREAN EXPERIENCE	Farmers' Market	Food Stars	Crush	Gift Guide	Girls' Weekends	Up & Coming Destinations
CULTURE OF INDEPENDENCE	See History		Bumbershoot and Beyond		Shop with the Artisans	Unique Holiday Destinations
SCENIC GRANDEUR	Ferry Day Trips	Glacier Views	Foliage	Salmon		Winter Wonderlands
ALL-ACCESS ADVENTURE	Back Country	Surf Washington	Biking			Snow Camping
COASTAL COOL	Storm Watching					
OTHER SEASONAL		Labor Day			Holiday	2007 Highlights Holiday Card

Activity Key: **PITCH** **FAM TRIP** **MAILER**



Story Concepts and Seasonal Timing

- Story concepts for 2009 and 2010:
 - Seasonal angles will continue to be relevant—and a significant component of the ongoing News Engine.
 - Epicurean calendar
 - Up-and-coming arts events
 - Perennial adventure suggestions
 - Warm-weather water ideas
 - Uniquely Washington experiences
 - Emerging travel trends and products Washington has that relate to each trend will also shape the story calendar:
 - **Ecotourism** and the sharp increase of LEED-approved (“green”) hotel/resort properties currently under construction around Washington state.
 - **Voluntourism** and the experiences that CVBs can recommend for visitors wanting to give back—to nonprofit causes, to the environment, etc.—as part of their vacation.
 - **Rare Vacations** and the burgeoning number of luxury travelers looking for the “next thing” beyond just simple adventure vacations.
- Olympics 2010

International PR Initiatives

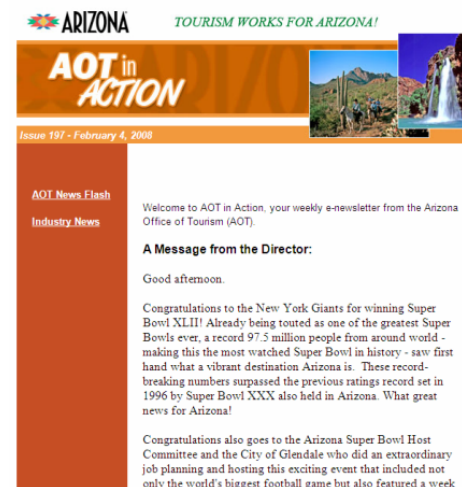
- Deliver “PR in a Box” to international offices around 6-8 news engine activities:
 - Provide images, digital assets, press materials and pitches.
 - Each office can localize the materials as needed.
- Liaise with international offices as appropriate for media requests, familiarization trips, etc.
- Coordinate with Community, Trade and Economic Development (CTED) to ensure the Tourism Department is represented in any relevant communication.



PR To Build Stakeholder Relations

Ongoing CTED communications to industry:

- Monthly e-mail update from Tourism director.
- Recent activities of office (conferences, trade missions, marketing campaign, Tourism Commission updates.)
- Recent industry issues (TIA, nationwide research, etc) condensed in consumable bites with links for additional information.
- Ongoing communications with elected officials, legislators, and editorial boards to continue building awareness and appreciation of tourism industry:
 - Quantitative and qualitative e-mails
 - Work to refine messaging on industry website.





Integration of State Annual Conference

Statewide Annual Governor's Conference

- CTED-led two-day program that brings statewide industry together.
- Close integration among Tourism Commission and CTED in programming and management .
- Raises awareness and recognition within governor's office and with legislators.
- Opportunity for CTED to drive education opportunities for statewide contingency.
- Private-sector match potential





Website Evolution





Web/Strategic Priority Integration

- Use multidiscipline marketing approaches to build interest and qualified traffic to Washington site using all forms of paid and non-paid media.
- Build website functionality (including a trip planner) that maximizes consumer understanding and engagement of the integrated travel products and themes available in Washington state.
- Enhance a consumer's ability to purchase Washington travel products and create revenue-generating opportunities through the website.
- Expand communication and connection with existing and prospective visitors through development of a range of opt-in communication vehicles, maximizing automated messaging capabilities.
- Deepen engagement of visitors through increased functionality of website to serve as a platform for social media.



Trip Planning and Site Monetization

- Build on the strong foundational site enhancements undertaken in FY2008 by providing trip planning capabilities and facilitating the ability of visitors to “close the sale.”
- Create a Web-based travel planner that assists prospective visitors in developing travel plans by driving prospects through the range of travel themes and products, reinforcing how various elements can fit together.
- Facilitate ways that visitors can actually book prospective Washington experiences, integrating with regional destination marketing organizations (DMOs) to serve up prepackaged themed experiences.



Cultivate and Nurture Prospects and Past Travelers

- Increase communication with and engagement of visitors by establishing capability for prospects to build a profile and opt-in for ongoing communications; craft a communications program with ongoing outreach.
- Implement an automated marketing management tool that will improve the ability to deliver highly targeted messages on a regular frequency driven by the user (i.e., weekly, monthly, daily, based on areas of interest); use this ability to deepen engagement and provide deeper prospective experiences to visitors.
- Integrate digital e-marketing functionality that pushes ongoing vertical promotions to loyal interest groups.
- Consider expanding portions of the site in multiple languages to increase connection with international visitors.



Foster Community Engagement

- Build a community extension of the website that supports user-generated content creation and publishing—initially starting with stories, itineraries and photos.
- Support multimedia formats including video and varying degrees of sharing capability (e.g., share with everyone, share with only people I designate) and overlay with mapping technologies.



Special Initiatives

- 2010 Olympic-dedicated portions of site: develop portions of the site to support 2010 marketing and PR efforts.
- Industry site redesign: redesign the industry site to create a more dynamic environment for business interactions, exchange and community in order to support marketing of the state and to align the tone and message with consumer website.
- Online media kit and enhanced advertising tools: develop enhanced features and reporting of the business links and online advertising program to support enhanced monetization of the site and increase promotion through an online media kit.



Maximizing Co-op Opportunities

Primary Co-op Initiatives

Print marketing co-op ad buys

- *Sunset, Smithsonian, Coastal Living, Conde Nast Traveler, Outside, Food & Wine, etc.*
- Target \$500,000 in co-op purchases

Web

- Premium listings
- Banner ads
- Potential target \$200-\$300K annual revenue generation

Statewide travel newspaper insert

- Focused in target markets—run 2x annually, 1.6 million run
- Ability to deepen stories/linkages
- Requires state investment (\$200K)—net \$400K in private match

State Travel Guide

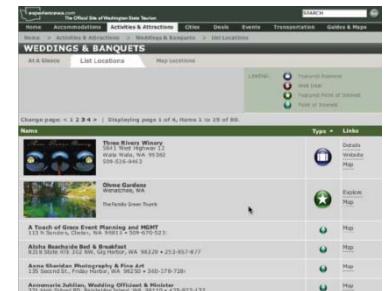
- Requires sensitive approach to maintain lodging participation
- May require initial investment at startup—net \$650K to \$1 million in private match

Annual Governor's Conference

- Sponsorship and conference sales
- Potential in annual revenues

UP TO
77%
OFF

Magazine	Savings
Food & Wine	77%
Nat'l Geo Adventure	75%
Nat'l Geo Traveler	66%
Natural History	63%
Montana Magazine	54%
Sunset	52%
Boise Journal	51%
Outside	50%
Smithsonian	30%
Coastal Living	26%





Expanded Product Co-Op Initiatives

Integrated product-themed initiatives: prospective revenue generation could vary significantly

- **Organizational product priorities**
 - Cruise
 - Wine
 - Ski
- **Targeted corporate initiatives (sample opportunities)**
 - **REI**—Offer REI Adventure spots for fam trips in exchange for Web visibility.
 - **WAMU**— Include “Experience Washington” buckslip in out-of-state credit card statements.
 - **Eddie Bauer**—Link to ExperienceWA.com from e-commerce site; company could feature site and itineraries in catalog; we could use merchandise for media giveaways.
 - **Expedia**—Explore potential for “white label” travel portal for ExperienceWA.com.
 - **Costco**—Feature Washington State in its travel catalog.
 - **EMP/Vulcan Ventures**—Sponsorship for food/culinary calendar mailing in exchange for South Lake Union advertorial content
 - **Amazon**—Affiliate program feature on Washington travel books
 - **Starbucks**—Free WiFi “HotSpot” access in Washington for eligible visitors
 - **Cabela’s**—Watchable Wildlife promotional partnership (discounts, event, etc.)
 - **Washington Wine Commission**—Cross-promotion of websites; POI content sharing with their interactive trip-planning tool
 - **Alaska/HorizonAir**—Re-brand select weekend routes as “Washington Wine Flights,” featured on AlaskaAir.com.
 - **Holland America**—Collaborate on refreshed content and statewide itineraries for Seattle stopovers; create Washington-branded shipboard activities program (“Washington Welcomes You” event, wine program on board)
 - **Microsoft PRIME program**—Provide opportunity for statewide partners to be included in this large employee discount marketing vehicle.

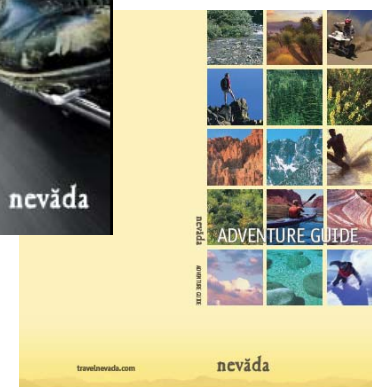
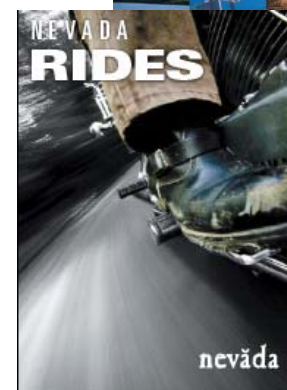
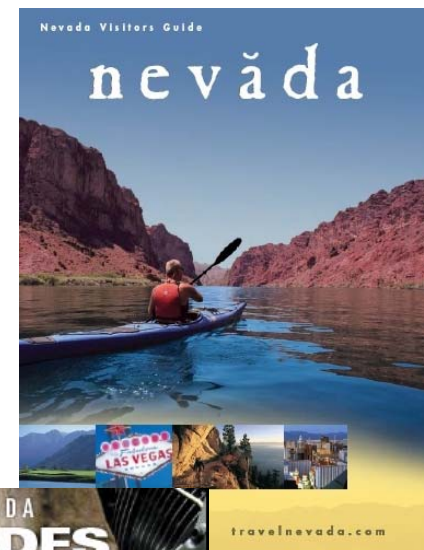


Fulfillment Refinement



State Travel Guide “Must-Haves”

- “Must-have” Washington State Travel Guide attributes:
 - Consistency with broader state campaign
 - Access online with downloadable features
 - Comprehensive review and graphic demonstration of broad array of state travel products and unique destination experiences
 - Sample itineraries
 - Calendar of special events
 - Accessibility/transportation info
 - Detailed regional maps, noting regional attractions
- Work towards broader array of niche collateral pieces in future years
 - Nature/outdoor recreation
 - Cultural/heritage
 - Wine/culinary
 - Scenic byways





Producing a Tourism Commission Travel Guide

- Overriding consideration:
 - Tourism Commission should maintain control of content and distribution.
 - Guide will likely be key component in achieving private-sector matching revenue.
- Who produces:
 - Variety of entities could market and produce publication; pursue competitive bid.
- Time frame for production:
 - 9 to 12 months for full sales and production process
 - 60-to-90 day RFP process
 - 6-month sales cycle
 - 2-month production/printing period after close of sales
- Integration with other marketing/brand tools (print, Web, etc.):
 - Process must be integrated with marketing, public relations and Web contractors to ensure consistency of brand and messages.
- Matching dollar potential:
 - Target volumes—approximately 250,000 1st year, growing to 500,000 by 3rd year
 - Potential revenue generation—\$650,000 1st year, growing to \$1million by 2010
 - Potential initial investment by CTED at startup



Travel Trade





Travel Trade

- Expand array of marketable Washington state geotourism-oriented travel itineraries featuring the integrated product mix by season.
- Prioritize direct sales promotions to domestic and international travel wholesalers and receptive operators through established trade show venues, including TIA Pow Wow, ITB and JATA.
- Establish ongoing public relations programming targeting international travel and trade media.
- Seek ongoing co-operative marketing programs with in-state and regional partners and overseas air carriers serving Washington state.
- Use Tourism's overseas marketing contractors as distribution vehicles for Washington travel products targeting international travel wholesalers and receptive operators.
- Continue relationship with Port of Seattle and Seattle CVB in international outreach efforts.



Product Development





Product Development

- Work to establish a statewide product development working group tasked with providing content ideas for PR and Web integration initiatives—CTED and interagency cooperation will be essential.
- The working group would embrace a “mental mortar,” rather than a “bricks and mortar” mind-set and would help ensure the featured integrated products were actually delivered on the ground.
- Similar groups would be launched throughout the state led by regional destination marketing organizations (DMOs) to help apply statewide thinking on a local basis.



2010 Marketing Opportunities





2010 Initiatives

- Continue to build on FY2008's integrated marketing cooperative within the Pacific Northwest (PNW) region including at least Oregon and British Columbia; work to develop an integrated approach/identity, particularly directed to prospective international travelers-early FY2009.
- Identify and seek cooperative marketing partnerships with any Washington- or PNW-based Olympic Sponsor – early FY2009.
- Work with local communities and organizations, further developing team hosting opportunities and outreach – early FY2009.
- Use the state tourism website to further engage the consumer with targeted or enhanced itineraries and activities aligned with the 2010 Olympics.
- Develop and launch a variety of pre- and post-familiarization tours for national and international media–FY2010.
- Post-Olympic “outdoor recreation” campaign around continuing a Northwest Olympic experience.



Research Priorities





Research Initiatives

- **Update domestic visitor profile**
 - Origin, activities, trip itineraries, demographics, etc.
- **Brand and ad awareness tracking study**
 - Return on Investment (ROI) conversion analysis
- **Canadian/British Columbia focus group**
 - Use to deepen understanding of factors inhibiting travel frequency and duration, as well as factors that could stimulate future travel activity.
- **Expanded international analysis**
- **Experiencewa.com equity study**
 - Investigate awareness, meaning and equity associated with experiencewa.com.



Budget Allocations





Estimated FY 2009/2010 Draft Expenditures

FISCAL YEARS	FY 07/08 Budget	FY 08/09 Budget	% Budget	FY 09/10 Budget	% Budget
CTED RESOURCES	\$6,664,500.00	\$6,908,000.00	79%	\$ 6,664,500.00	74%
PRIVATE SECTOR MATCH	\$0.00	\$1,850,000.00	21%	\$ 2,350,000.00	26%
TOTAL BUDGETED RESOURCES	\$6,664,500	\$8,758,000	100%	\$9,014,500	100%
CTED EXPENSES					
CTED Advertising Expenses	\$2,600,000	\$2,420,000		\$2,180,000	
Private Sector Advertising	\$0	\$750,000		\$900,000	
ADVERTISING	\$2,600,000	\$3,170,000	36%	\$3,080,000	34%
CTED PR Expenses	\$632,500	\$554,500		\$448,500	
Private Sector PR	\$0	\$0		\$0	
PUBLIC RELATIONS	\$632,500	\$554,500	6%	\$448,500	5%
CTED Web Expenses	\$1,123,000	\$1,052,000		\$970,000	
Private Sector Web	\$0	\$300,000		\$300,000	
WEB SITE	\$1,123,000	\$1,352,000	15%	\$1,270,000	14%
CTED International Expenses	\$440,000	\$460,000		\$495,000	
Private Sector International	\$0	\$0		\$0	
INTERNATIONAL	\$440,000	\$460,000	5%	\$495,000	5%
CTED Research Expenses	\$209,000	\$256,500		\$94,000	
Private Sector Research	\$0	\$0		\$0	
RESEARCH	\$209,000	\$256,500	3%	\$94,000	1%
CTED Product Development Expenses	\$100,000	\$186,000		\$127,000	
Private Sector Product Development	\$0	\$150,000		\$150,000	
PRODUCT DEVELOPMENT	\$100,000	\$336,000	4%	\$277,000	3%
CTED Fulfillment Expenses	\$250,000	\$450,000		\$500,000	
Private Sector Consumer Marketing	\$0	\$650,000		\$1,000,000	
CONSUMER MKTG/FULFILLMENT	\$250,000	\$1,100,000	13%	\$1,500,000	17%
CTED Administration Expenses	\$1,066,000	\$1,379,000		\$1,600,000	
Private Sector Administration	\$0	\$0		\$0	
ADMINISTRATION	\$1,066,000	\$1,379,000	16%	\$1,600,000	18%
CTED Competitive Grant Expenses	\$0	\$150,000		\$250,000	
Private Sector Competitive Grant	\$0	\$0		\$0	
COMPETITIVE GRANT PROGRAM	\$0	\$150,000	2%	\$250,000	3%
CTED Expenses	\$6,420,500	\$6,908,000	79%	\$6,664,500	74%
Private Match	\$0	\$1,850,000	21%	\$2,350,000	26%
Total Private Match and Expenses	\$6,420,500	\$8,758,000	100%	\$9,014,500	100%



Performance Measurements



CTED Performance Measures—Industry

1. Lodging performance
 - Occupancy
 - ADR (Average Daily Rate)
 - RevPAR (Revenue per Available Room)
2. Bed tax revenue generation
3. Visitor volumes
 - Domestic
 - International
4. Economic impacts of visitor spending
 - Direct spending
 - Indirect/induced spending
 - Direct jobs
 - Indirect/induced jobs





CTED Performance Measures —Activity

1. Number of press contacts
2. Number of familiarization tours coordinated (press and travel trade)
3. Number of participants in familiarization tours (press and travel trade)
4. Number of workshops/seminars coordinated
5. Number of participants in workshops/seminars
6. Number of trade shows attended
7. Number of grants awarded

CTED Performance Measures—Outputs

1. Number of 800-number inquiry calls received
2. Number of travel guides distributed
 - Via phone request—hard copy
 - Via Web—hard copy
 - Via Web—electronic version
 - Other
3. Website utilization
 - Number of website visits
 - Time spent on site
 - Return visits
4. Website trip planning assistance (beginning 2010)
 - Utilization of trip planning tool
 - Volume of click-throughs on package itineraries
5. Website community engagement (beginning 2010)
 - Number of profiles developed
 - Op-in messages sent

CTED Performance Measures—Outputs

6. Dollar value of co-op advertising
7. Dollar value of private-sector match
 - Dollars
 - In-kind
8. Dollar value of ad equivalence of Public Relations efforts
 - Domestic
 - International
9. Return on Investment (ROI) of advertising
 - Visitor spending generated as a direct result of advertising
 - State and local taxes generated as a direct result of advertising