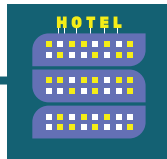




2023

Strategic Plan





CONTENTS

Executive Summary	3
Introduction and Purpose	8
Interlocal Communities	9
Role of SEA (Seattle-Tacoma International Airport).....	13
Overview of Explore Seattle Southside	15
Competitiveness of Seattle Southside	19
Destination Assets	19
Demand Drivers and Attractions	20
Hospitality Infrastructure	22
Visitor Flow & Spending	23
Stakeholder Engagement	27
Stakeholder Survey	28
Comparison of Seattle Southside	33
Southside Strengths, Vulnerabilities, and Opportunities.....	37
Strategic Recommendations	40
Increase Off-Season Travel	40
Extend Peak Season Length of Stay	41
Advance the Region's Brand	42
Priorities	43
Implementation	43
Appendix	44

Executive Summary

As the leading destination marketing and management organization serving the southern portion of Washington’s King County, the Seattle Southside Regional Tourism Authority sought a comprehensive update to its 2016-2021 strategic plan. The organization, which contractually serves the cities of Des Moines, SeaTac, and Tukwila, underwent significant change over the last two years of the previous strategic plan as the pandemic’s impact on business volume and mix was still in recovery mode. Additionally, a change within the CEO position brought new ideas and initiatives that would impact the direction of the organization.

The strategic planning process included carefully selected steps to gather and analyze information and input needed for building the organization’s direction. The planning process included the following steps:

- Assessing Community Alignment
- Conducting Stakeholder Engagement
- Benchmarking Competitive Analysis
- Reviewing Industry and Travel Trends
- Discovering Strengths-Weaknesses-Opportunities-Threats (SWOT) Insights
- Developing Strategies & Tactics



The Seattle Southside Regional Tourism Authority collaboratively involved its industry stakeholders during this process, including hotels, attractions, and venues, city partners (including regular updates to legislative committees and multi-departmental representation), its competitors across other Washington State destinations who provided input on trends in their own areas, its business community, and the Seattle Southside Chamber of Commerce.

The applied leadership, particularly during the months of the strategic planning process, showed clear evidence of the true vision and commitment of this organization. Over the course of the planning process, the Regional Tourism Authority team continued to strategically and successfully deliver programming and service enhancements to meet the needs of its community partners and industry members.

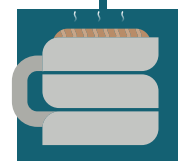


Input and research analysis highlighted several areas that needed to be addressed through the plan's final direction, including:

- The seasonal variances in travel to the destination
 - The role and importance of sports
 - The magnitude of visitor volume utilizing SEA (Seattle-Tacoma International Airport)
 - The confidence and cooperation of industry stakeholders in the Regional Tourism Authority's marketing and sales approach
 - Concern over growing incidents of crime and the impact on both visitor and employee safety
- The opportunities offered by hobby and social, military, education, religious, and fraternal (SMERF) market segments
 - The gradual reemergence of corporate travel, especially given the strength of the metro area's business community
 - The opportunity to expand the Regional Tourism Authority's program of work through contracted services with neighboring cities



MaST Center Aquarium | Des Moines, WA



The Plan’s direction builds on the strategic context of the organization’s mission and vision by focusing on three specific areas:



Strategic Context

Mission

Explore Seattle Southside optimizes opportunities for its region to significantly benefit from tourism to improve both quality of life and economic impact.

Vision

To position Seattle Southside as a destination of choice for travelers to the Pacific Northwest in order to enhance the image and economic strength of the region.



Museum of Flight | Tukwila, WA

Strategic Areas



Increase off-season travel



Extend peak season length of stay



Advance the region’s brand

Each strategic area includes recommendations that should be addressed through annual work plans by the departments and team members of the Regional Tourism Authority. Those annual tactical steps and associated schedules allow the Regional Tourism Authority to drive a realistic implementation approach with the ability to adapt as future needs and opportunities arise.

Increase off-season travel



1. Targeting regional travelers and metro Seattle residents by:
 - a. Leveraging seasonal special events as a draw/cause for travel
 - b. Encouraging overnight stays for park and fly
 - c. Applying personae research to focus on high propensity potential travelers to encourage them to experience Seattle Southside's offerings
2. Promoting off-season conference, sports, and lifestyle hobby group bookings by:
 - a. Facilitating discussions with and opportunities for Impact Group partners
 - b. Assisting relationship building between the hotels and corporate leaders
 - c. Developing a marketing campaign program targeting qualified lists of conferences, seminars, and trainings.



Highline SeaTac Botanical Garden | SeaTac, WA

Extend peak season length of stay



3. Utilizing persona data to develop and implement a peak season specific marketing and communications approach targeting cruise passengers and summer SEA travelers
4. Leveraging sports and special events as a key component for extending visitors' length of stay
5. Cataloging best practices and aspirational programming of other airport destinations that connect well with Explore Seattle Southside needs and opportunities
6. Proactively marketing attractions beyond the current Interlocal Agreement (ILA) cities of Des Moines, SeaTac, and Tukwila that would serve as additional options for visitors to enjoy during their stay
7. Crafting and spreading stories/content showcasing options for conference attendees, sports participants and spectators, and business travelers to extend their stay or experience more aspects of the destination based on ease of access between hotels and amenities



Des Moines Marina | Des Moines, WA

Advance the region's brand

8. Undertaking a regional initiative to provide toolkits of digital assets to destination partners to optimize the Seattle Southside region's digital footprint
9. Expanding ways that the RTA's market intelligence could complement the work of partners and stakeholders to promote a positive brand for the region
10. Using communications and events to champion the value of tourism and demonstrate how tourism promotional activities support regional and community goals (to garner sustained support for the visitor economy)
11. Providing data and market intelligence of potential visitor usage to inform placemaking investments by member communities and private developers and/or regional transportation plans and initiatives
12. Developing a program/service for allowing attractions in non-member municipalities to participate in marketing efforts to extend visitor stays
13. Collaborating with SEA and the Port of Seattle to market travel amenities, ease of access, and value across the region



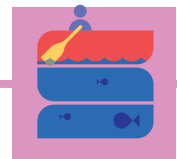
Marketplace Cafe - Westfield Southcenter | Tukwila, WA

Introduction and Purpose

Since embarking on this strategic planning process, the Seattle Southside Regional Tourism Authority (RTA) has successfully taken on the following initiatives:



- Changed its operational name to Explore Seattle Southside
- Launched a new organizational brand design built around microadventures
- Rebuilt the primary promotional website – [SeattleSouthside.com](https://seattlesouthside.com)
- Maintained marketing campaigns and launched new promotional campaigns
- Engaged local destination partners to participate in an innovative cooperative business development program
- Advised on a large-scale destination development assessment with one of the member communities
- Invested in new research and market intelligence tools through its relationship with Zartico
- Continued to advocate locally and at the state level for tourism industry support



This organization has accomplished these initiatives with the support of its Board of Directors, industry stakeholders, and member communities. The organization's talented team displays a visionary approach to best-of-class collaborative programming. Each of the above listed accomplishments or initiatives occurred or continued throughout the span of this strategic planning process, which ran from late September 2022 to March 2023.

The ongoing successes of Explore Seattle Southside aided the development of this Strategic Plan as a road map for the team's marketing and promotional efforts. The ability to leverage ongoing accomplishments demonstrates a level of trust and support among industry and community leaders as well as destination stakeholders that allows this organization to clearly focus its initiatives, continue proactively involving stakeholders, and concentrate resources into addressing key need periods and vulnerabilities. Through this plan, Explore Seattle Southside will continue to advance the area's brand and promote its diverse destination experiences.


This 2023 Explore Seattle Southside Strategic Plan builds off the accomplishments of the 2016-2021 Strategic Plan.ⁱ

Interlocal Communities

Three communities, Des Moines, SeaTac, and Tukwila, partner together to form the destination known as Seattle Southside. The communities are connected by their proximity to the City of Seattle within the southwestern portion of the large geographic area of King County, Washington. Each community has its own unique character and combined they offer the complete destination package. Collaboration between the three cities under the destination leadership of Explore Seattle Southside is essential to establishing a highly functional and competitive Pacific Northwest destination.



City of Des Moines Marina | Des Moines, WA

 Seattle Southside – The communities surrounding the Seattle-Tacoma International Airport (SEA) and bordering the Puget Sound to the west provide a convenient access point for air travelers utilizing SEA, regional travelers interested in the sites and experiences of the Seattle metropolitan area, recreational travelers taking in one of the many national, state, or local parks dotting the region, or business travelers working to connect with the region’s large corporate presence.



SEA serves as the area’s primary destination asset, and is supplemented by local parks, The Museum of Flight, over five million square feet of shopping including Westfield Southcenter, and many other attractions. This base of attractions is supported and bolstered by more than 60 hotels, over 9,000 hotel rooms, and over 100 full-service restaurants. The area is extremely diverse in population and this cultural fabric forms an additional opportunity for the area’s future. The mix of appealing attractions is connected to the larger Seattle metropolitan area by a widely varied and highly effective transportation system including ferries, highways, bus transit, and the Link light rail system.

The Seattle area corporate presence plays a large role in the attractiveness of this region as technology, distribution, transportation, and retailing each have notable headquarter locations in the greater region. In total, the Seattle metro area is home to over 100,000 businesses with 10 regional headquarters listed as Fortune 500 companies. There are nine notable headquarters or large campuses within the direct area of southern King County.

- | | | |
|--|-------------------------------|-----------------------------------|
| ■ Boeing, SeaTac | ■ Classmates.com, Renton | ■ Raleigh USA, Kent |
| ■ Blue Origin, Kent | ■ FAA, Des Moines | ■ REI, Kent |
| ■ Alaska Airline, SeaTac
(#459 Fortune 500) | ■ Oberto Sausage Co.,
Kent | ■ Wizards of the Coast,
Renton |



**Seattle metro area is
home to over
100,000 businesses**



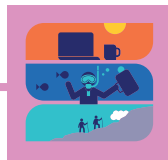
Holiday Inn Express & Suites Seattle-Sea-Tac Airport | SeaTac, WA



Des Moines – As the designated boating capital of the Pacific Northwest, Des Moines features the region’s connection to the Puget Sound lifestyle. Six miles of shoreline forms the western portion of this community providing access to marinas, beaches, piers, and parks. The City of Des Moines features a seasonal 40-minute ferry service to downtown Seattle.

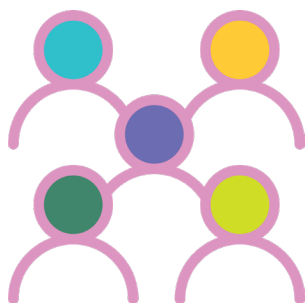


SeaTac – As the official home to the Seattle-Tacoma International Airport, this community is a hospitality center with over 30 hotels, many with large-scale meeting facilities, restaurants, and parking areas to accommodate air travelers. Beyond the airport, the city offers other abundant transportation options including Link light rail service to facilitate the flow of regional residents and visitors in and out of SEA.



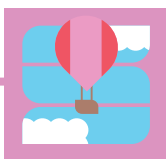
Tukwila – The northern-most community in Seattle Southside is home to five million square feet of retail offerings. One facility, Westfield Southcenter, at 1.7 million square feet, is the largest shopping mall in the Pacific Northwest. Beyond shopping, this dynamic community also includes the King County International Airport, a general aviation and cargo airport, and The Museum of Flight, the largest air and space museum in the country. The Museum of Flight displays over 175 aircraft and offers the region’s largest available event space.

Beyond the attractiveness and appeal of Seattle Southside, there are challenges impacting the direction of regional tourism. Property crime is notably high, and the stigma of safety concerns hinders the area's hospitality sector. Incidents of crime are localized and broad generalizations of the perception of safety are unfavorable for the image of this three-city region.



The three cities are some of the most racially diverse within the Pacific Northwest.

The combined population of the three cities is just under 90,000, just under 4 percent of the entire population of King County. The high growth rate of 12% since 2010 is lower than the overall 17% growth rate of the county. The three cities are some of the most racially diverse within the Pacific Northwest. Median household income is roughly \$30,000 lower than the average across King County contributing to a median value of owner-occupied housing that is almost \$270,000 lower than the King County average.



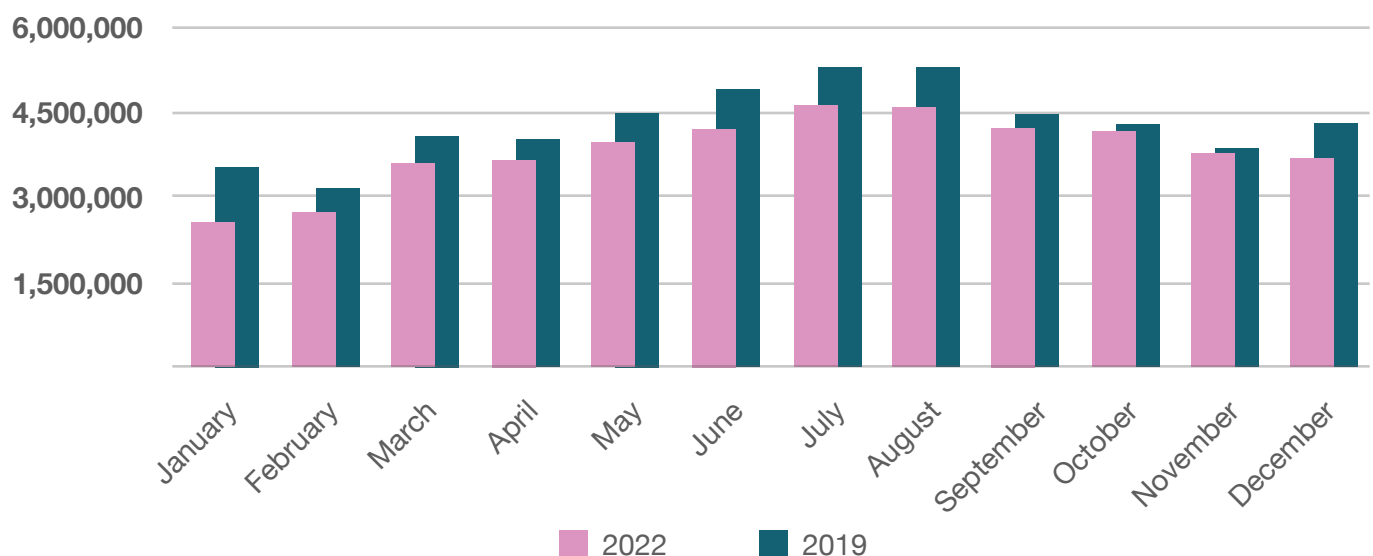
CENSUS.GOV (July 1, 2021)

	Seattle Southside	Des Moines	SeaTac	Tukwila
Total Population	85,063	32,689	30,759	21,615
Growth Rate (since 2010)	12%	10%	14%	13%
Race Origin				
American or Pacific Native	4%	4%	4%	4%
Asian	17%	12%	14%	24%
Black or African American	17%	11%	22%	19%
Hispanic/Latino*	19%	17%	22%	18%
White	37%	49%	33%	30%
Age				
Under 18	27%	29%	28%	25%
18-65	59%	53%	60%	64%
Over 65	14%	18%	12%	11%
Median Household Income	\$72,786	\$73,131	\$73,540	\$71,688
Persons In Poverty	11%	11%	11%	12%
Median Value of Owner-Occupied Housing (2017-2021)	\$384,700	\$416,500	\$364,400	\$373,200
Mean Travel Time to Work (Minutes)	27.7	29.6	27.4	26.1

Role of SEA (Seattle-Tacoma International Airport)

The Port of Seattle manages SEA within the City of SeaTac. By passenger volume, SEA ranked as the eighth busiest airport in the United States in 2022. Thirty-one airlines service SEA with 91 non-stop domestic and 28 international destinations. The airport is approximately 12 miles south of downtown Seattle and is serviced by the Link light rail.

Prior to the pandemic of 2020, SEA ranked as the 29th busiest in the world. Nearly 52 million travelers used the services and connections of the airport and the travelers contributed heavily to the regional economy. The pandemic dramatically changed the landscape of the tourism industry both around the world and within the Seattle region. In 2022, the SEA ranking rose to become the 16th busiest airport in the world. The airport's role as the primary demand driver for the region provides access to millions of visitors to the region while also creating ease of access options for getting to the area. The region also benefits from the scale of airport operations at SEA, most notably the headquarters of Alaska Airlines.



Passenger volume at SEA reached its peak level in 2019 as nearly 52 million passengers traveled through the airport. Passenger counts in 2022 were still recovering from pandemic related travel restrictions but managed to reach 46 million travelers, which was 3.8 million fewer than 2018, and 5.8 million fewer than the record setting level of 2019.



SEA conducted an economic impact study in 2018 and found that 8.2 million travelers out of the total 49.8 million passengers (16.5%) were specifically arriving at the airport to travel throughout Seattle and the Pacific Northwest. These travelers were responsible for generating \$5.9 billion in economic activity and supporting 68,200 jobs (Port of Seattle Sea-Tac International Airport Economic Impacts, conducted by Community Attributes, Inc. August 2018)

To provide perspective on the comparable magnitude of SEA's visitor volume, 51.8 million passengers for SEA (2019) was higher than visitation to either Times Square (50 million) or the Walt Disney World's Magic Kingdom (21 million).

51.8
MILLION
passengers
for SEA (2019)



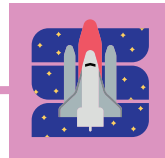
Out of the total passenger count, 9.3 million were arriving specifically for touring within the Pacific Northwest. This figure represents the potential fly-in leisure market size for the region. As a comparison, the total 2019 visitation to Pike Place Market, the top visited attraction in the Seattle Metropolitan Region, was 10 million visitors including both drive-in and fly-in.



Overview of Explore Seattle Southside

Explore Seattle Southside operates as a public development authority funded by a Tourism Promotion Area hotel assessment. Through this structure, the organization is subject to public disclosure, records regulations, and fiscal transparency to each member community. Aside from the public sector involvement of the three member communities through the 2014 Interlocal Agreement for the Joint Establishment of a Tourism Promotion Area, the organization does not maintain a private sector membership program. The City of SeaTac acts as the contracting entity and requires City Council approval for the governing contract with the Regional Tourism Authority.

Despite not having a membership-based program, Explore Seattle Southside engages the private sector through a cooperative business development program and a supportive engagement system called the Impact Group. This collaboration helps to target programs, provide input and guidance from a direct sales and marketing perspective, and allows hospitality partners to build programming that is most relevant to the results they individually need.



Funding

Explore Seattle Southside's funding is provided through a few different sources, most of which are public sector investments. The pandemic forced a shift in funding for 2020 as King County made a one-time investment of \$1.8 million through the Coronavirus Relief Fund for tourism recovery for that fiscal year, followed by \$175,933 in 2021. In most other years funding comes through Tourism Promotion Assessment (TPA funding) with the RTA receiving 100% of the total collections. The assessment comes from a \$2 per occupied room fee in hotels with 90 or more rooms excluding lodging tax exempt business.

	2017	2018	2019	2020	2021	2022
TPA Assessment	\$3,742,184	\$3,796,139	\$3,963,260	\$2,068,020	\$3,019,987	\$3,284,233
Other Funding	\$1,194,693	\$1,157,288	\$1,207,728	\$2,914,758	\$502,267	\$103,948
Expenses	\$4,717,230	\$4,573,160	\$4,240,940	\$4,657,361	\$2,792,508	\$2,935,655
Difference	\$ 219,647	\$ 380,267	\$ 930,048	\$ 325,417	\$ 729,746	\$ 452,526

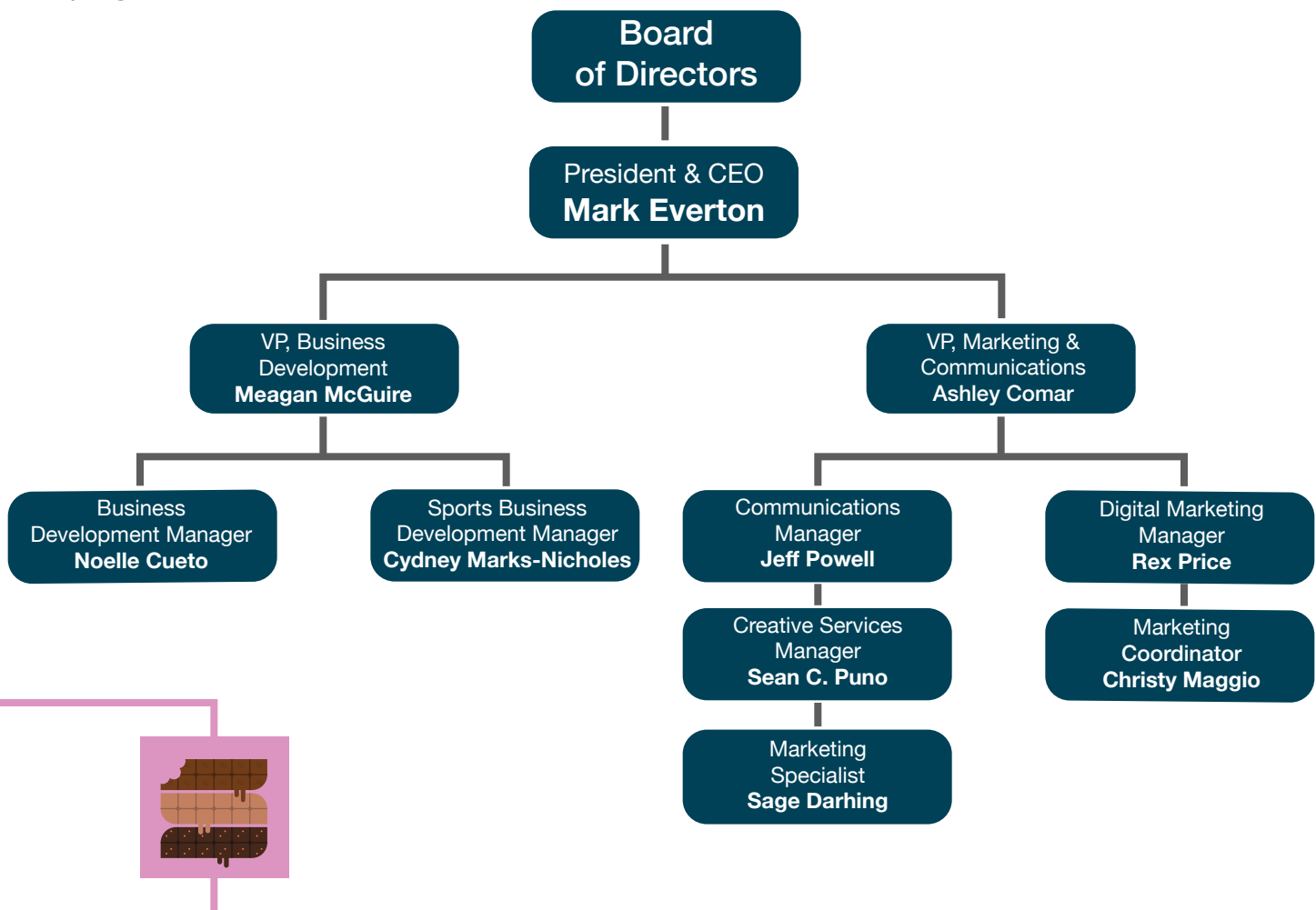
Other funding includes investments from the cities' lodging tax collections. Those investments are placed into grant funding authorized through an approval process by the individual city's Hotel Motel Tax Committee.

Governance

Explore Seattle Southside is governed by an eight-person board of directors. The 2023 Board roster includes:

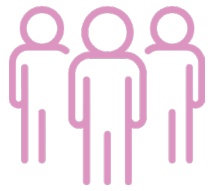
- Kelly Droll, Courtyard by Marriott Seattle/Southcenter
- Josh Ewing, DoubleTree Hilton Complex
- Meredith Mara, Columbia Hospitality
- Annie McGrath, Seattle Southside Chamber of Commerce
- Angela Mose, Four Points by Sheraton Seattle Airport South
- Bob Schrader, Seattle Airport Marriott
- Ken Stockdale, Crowne Plaza Seattle Airport

Team – The Explore Seattle Southside team focuses on the three primary program areas of the organization – business development, operations, and marketing & communications. The organizational structure shows the balanced approach utilized to generate results within each program area:



Programs

The programs of Explore Seattle Southside match the three components of the organizational structure - business development, operations, and marketing & communications. Operations is focused primarily on the fiscal management including budgeting, personnel, governance, and advocacy with the member communities. The mass majority of Explore Seattle Southside programming is concentrated on marketing and communications.



The **Business Development** team manages several different cooperative initiatives in alliance with the **Impact Group**. The

Impact Group is a collective of hospitality sales and marketing leaders from hotels, attractions, and venues across the three member communities. The Impact Group works alongside Explore Seattle Wouside. Business Development team to collaboratively outreach to desired sales markets, harness collective experience to improve sales and marketing materials, and share

ideas for developing business in Seattle Southside. To encourage Impact Group leadership and engagement, Explore Seattle Southside developed a Business Development Scholarship program to provide supportive funding for sales initiatives desired by the Impact Group members. Although Seattle Southside lacks a true convention center, the destination utilizes its hotel-based meeting space to host a wide variety of corporate, SMERF, and hobby groups within the region.



Connect West | San Francisco, CA



Seattle Seawolves - Starfire Sports | Tukwila, WA



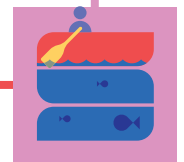
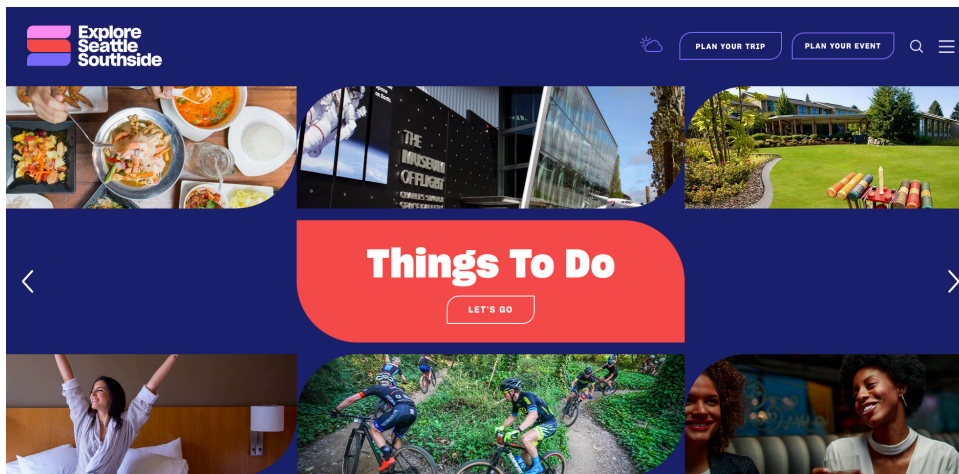
Sports is one specific market segment that continues to generate results across Seattle Southside, particularly around weekend tournaments. The region has assets that match well in this market segment. Beyond the sports specific work of the Explore Seattle Southside team, the region is served by the multi-county Seattle Sports Commission, although most of the Commission's time and efforts go towards pursuing and hosting extremely large-scale events for the metropolitan area.



MaST Center Aquarium | Des Moines, WA

The Business Development team also works to support events occurring at Seattle Southside venues to improve client satisfaction and guest experience within the destination. A variety of hospitality options are available for event planners to enhance the stay and satisfaction of their attendees.

The **Marketing and Communications** team produces the messages and materials utilized to reach the various target audiences being pursued by the destination. The brand mark shifted in 2022 to become Explore Seattle Southside with the logo effect emphasizing the diversity of activities available across the destination. The concept of microadventures emerged through this brand development process as a connection across the entirety of the destination.



In January 2022, Explore Seattle Southside launched a fully revised website to showcase the various offerings across the destination. The video series profiling the new brand dynamics provides a clear example of the team's ability to translate destination experiences into relatable and creatively entertaining messages.



Competitiveness of Seattle Southside

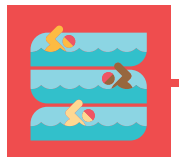
Destination Assets

To provide context around which Explore Seattle Southside can optimize the region's visitor economy and ensure its promotion activities contribute to the long-term vitality of the region, the area's place-based assets and destination products were analyzed. The analysis included creating an inventory of the demand drivers, attractions, and hospitality infrastructure in the region. Mapping of the various product elements uncovered potential areas of synergy among attractions and demand drivers, as well as increased the understanding of current visitor flows.

Demand Driver: Demand drivers are defined as those assets and attractions that provide the actual trip purpose. Not all demand drivers are focused on leisure travel. Events, sports, and business travel are considered demand drivers.

Attractions: Attractions are natural recreation areas, facilities, venues, activities, or events in the area that provide activity for people visiting Seattle Southside or the larger Pacific Northwest region. Attractions are often bundled to create experiences that drive visitation. Many times, individual attractions are not the trigger for causing a visit in isolation.

Hospitality Infrastructure: Those retail, dining, and lodging options that provide visitor services that enhance the visitor experience in the region.



Demand Drivers and Attractions

The Seattle Southside region includes the cities of Tukwila, SeaTac, and Des Moines. SEA is located within the region and services travelers to and from the Greater Seattle region and much of the Pacific Northwest.

Each of the member cities in Seattle Southside offer a range of attractions—from entertainment venues, specialized museums, retail centers, and ethnic and cultural neighborhoods. The region’s situation along the Puget Sound also provides direct access to water activities.

As the member cities have matured, their destination products have taken on a more urban flavor. The region has several concentrations of retail services, independent restaurants, and local attractions. Additionally, the region has leveraged sports and outdoor venuesⁱⁱ to encourage sports tourism. The region is home to Starfire Sports, with 54 acres of soccer facilities, as well as Parks and Recreation facilities, and a nationally-sanctioned BMX track.



Starfire Sports | Tukwila, WA



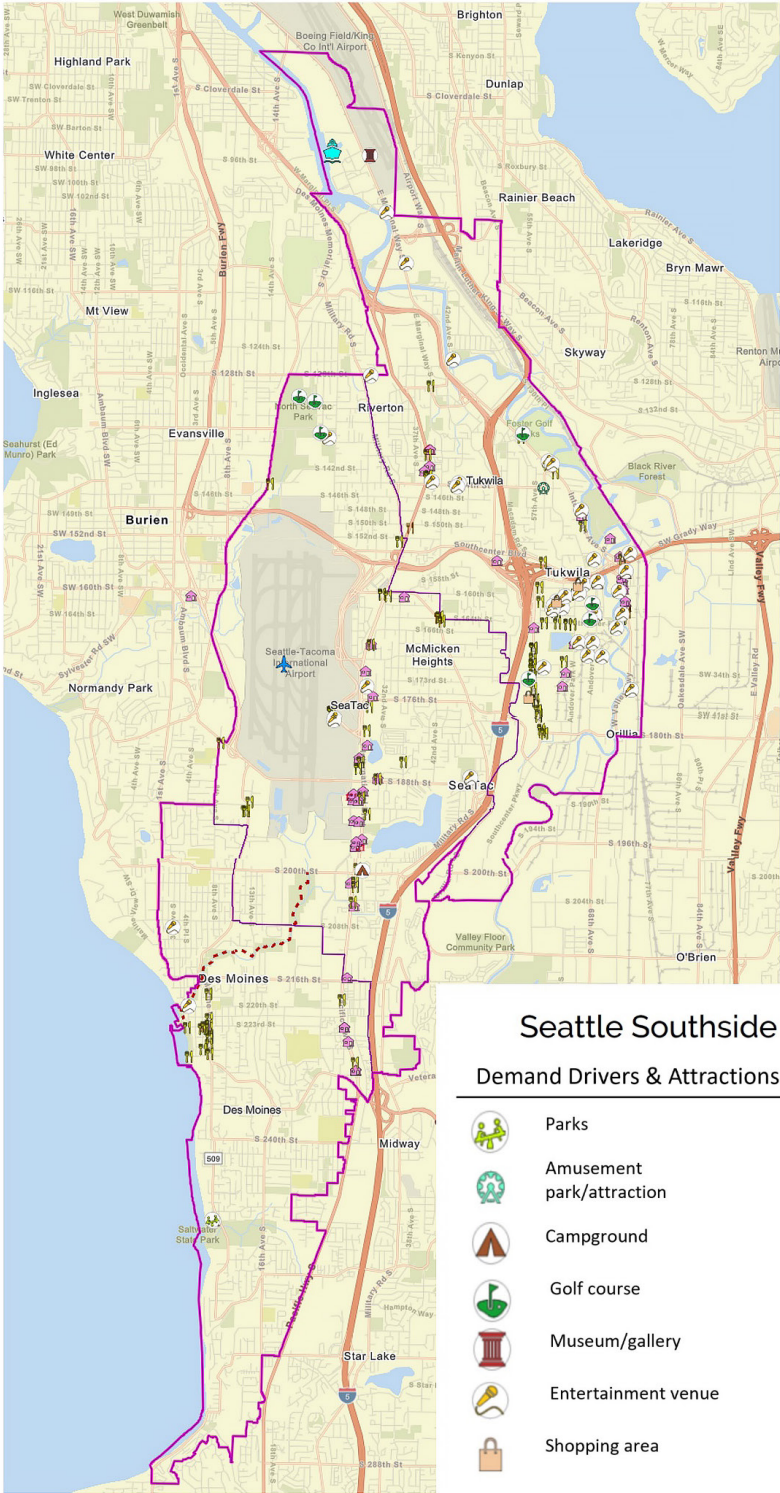
SeaTac BMX | SeaTac, WA



The region contains a combined total of more than 350,000 square feet of flexible and traditional meeting space. While there is not a dedicated convention center in the region, the availability of in-house meeting facilities within area hotels and unique venuesⁱⁱⁱ allows the region to service a range of small- and medium-sized events.

SQ FEET
flexible & traditional
MEETING SPACE

350,000



Seattle Southside Destination Assets

Demand Drivers & Attractions

- Parks
- Amusement park/attraction
- Campground
- Golf course
- Museum/gallery
- Entertainment venue
- Shopping area

Hospitality Infrastructure

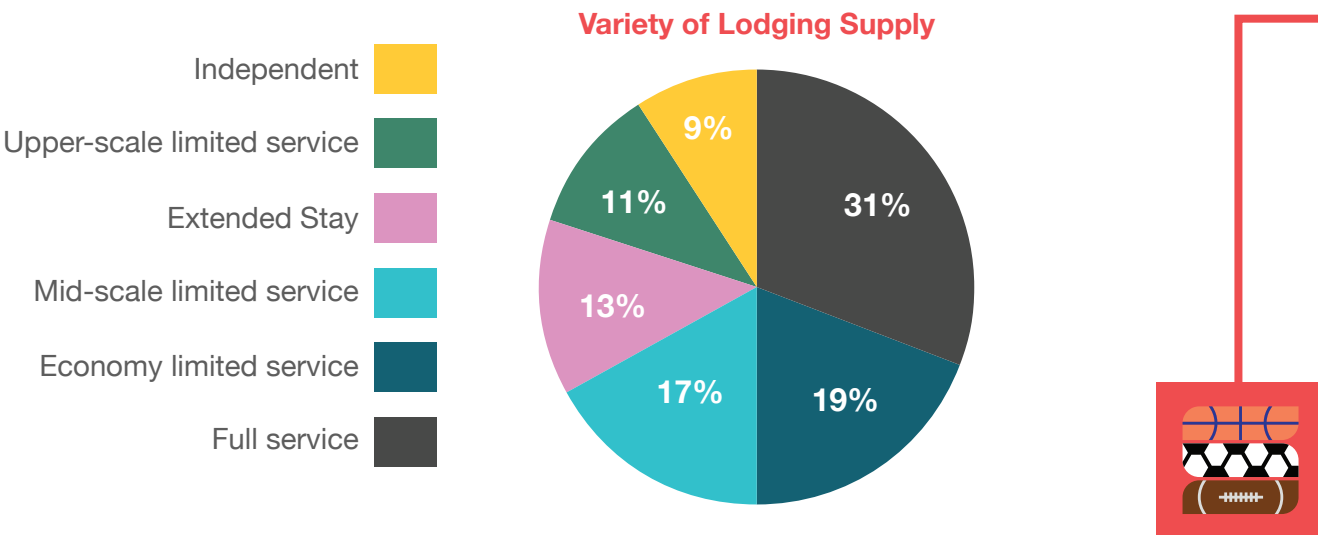
- Airport
- Independent Lodging
- Branded Lodging
- Independent Dining
- Chain Dining
- Medical facility

Hospitality Infrastructure

Hotel/Lodging Supply

While travelers rarely visit a destination solely to stay in one of its hotels or lodging properties, a destination’s hotel and lodging supply is an important factor in its capacity to service visitors. The properties not only provide accommodations for the visitor, but also collect lodging taxes and the assessment that is used to fund the activities of Explore Seattle Southside.

In 2022, there were approximately 9,200 hotel rooms in the region. The lodging supply developed partially to serve SEA, but also to meet the needs of the strong corporate presence in the region and create a home base for visitors exploring the Pacific Northwest region. The properties in the region vary across chain scales and offer visitors a variety of lodging options and price points.



Connectivity to Seattle, Tacoma, and other Pacific Northwest population centers

Another element of the region’s infrastructure that serves the region well is the connectivity to Seattle and the other metropolitan areas via Link Light Rail as well as Amtrak Cascades. Interstate 5 is a major north-south route through the Seattle Southside region. The region also benefits from access to Interstate 405 and regional highways 509 and 518.

	Travel time to/from Seattle Southside	Distance to/from Seattle Southside
Lumen Field	15 minutes	11 miles
Pike Place Market	20 minutes	13 miles
Space Needle	20 minutes	13 miles
Snoqualmie Falls	35 minutes	32 miles
Everett	40 minutes	43 miles
Olympia	1 hour	49 miles
Mt. Baker-Snoqualmie National Forest	1 hour	58 miles
Mount Rainer National Park	1 hour 30 minutes	76 miles
Bellingham	1 hour 30 minutes	101 miles
Crystal Mountain	1 hour 45 minutes	73 miles

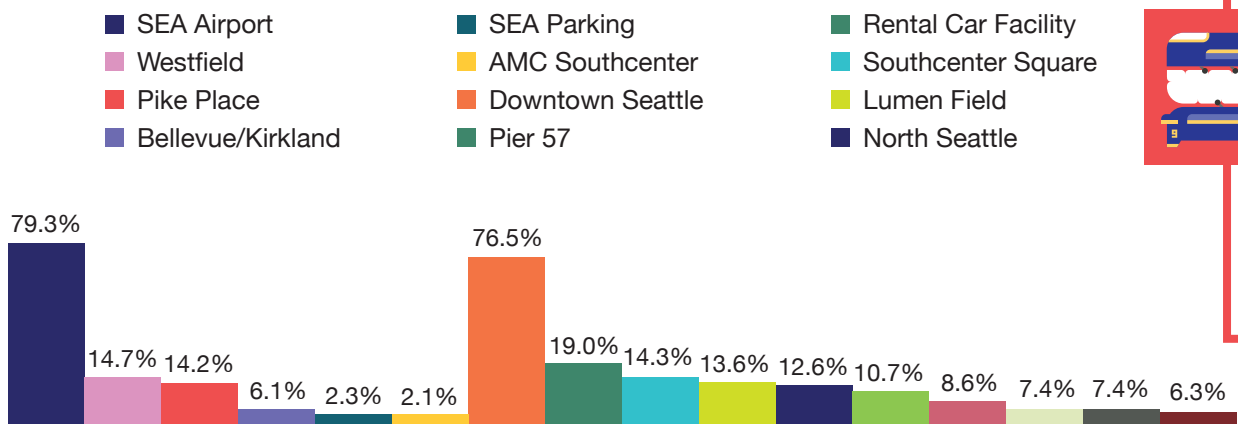
Travel times to/from Seattle Southside (non-peak travel times)

Visitor Flow & Spending

In the months leading up to the strategic planning initiative, Explore Seattle Southside made a series of investments into new market intelligence resources including the Zartico destination management system and a Traveler Personas Research Study through Destination Analysts. Additionally, the organization relies on additional information collected and disseminated by the State of Washington Tourism, although these resources often do not narrow into the specific needs of the three-city area. To help illustrate localized travel spending impacts across the region, Explore Seattle Southside has commissioned Dean Runyan Associates in the past to calculate economic impacts.

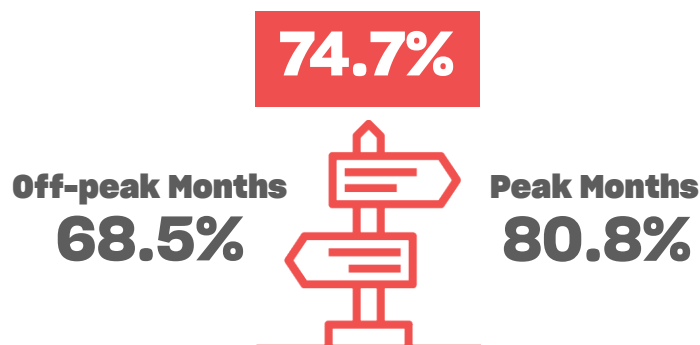
Visitor Profile

The Zartico system includes geolocation data to track visitor patterns of guests traveling to the region. The prominence of SEA is notable as 79% of travelers to the region visit the airport. Of those travelers that visit other parts of the Seattle area, Pike Place sees the most travelers that stay in Seattle Southside (77%).



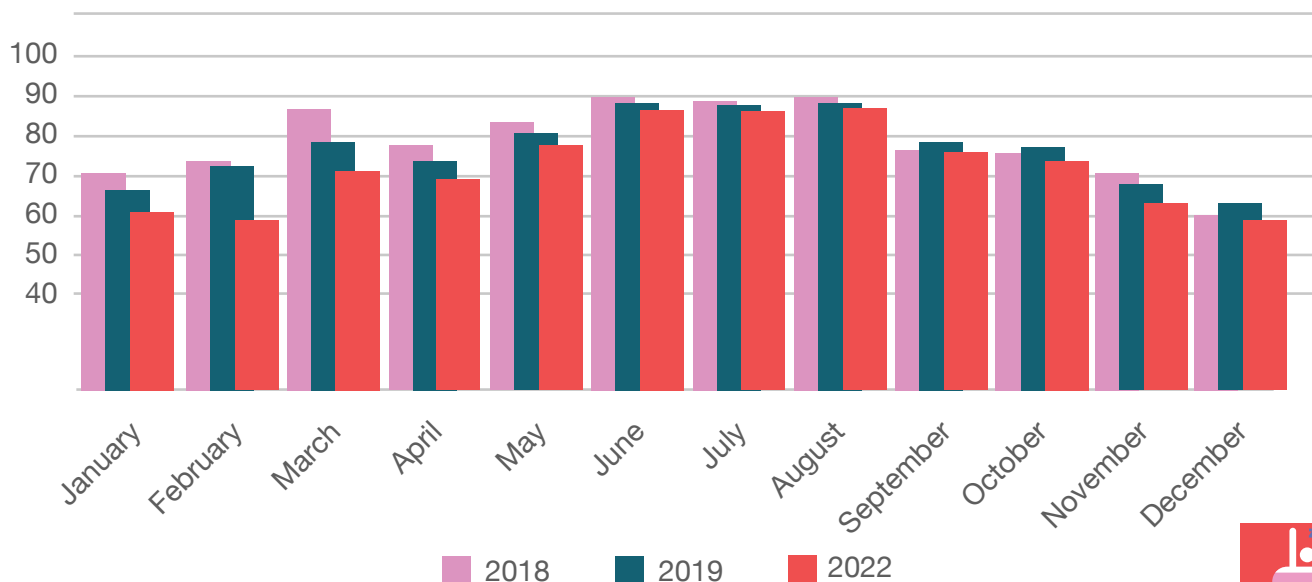
Lodging Performance and Seasonality

The Seattle Southside lodging industry shows its strong performance with an average annual occupancy rate of 74.7%. The area shows seasonal variances between the peak months of March through September at an average occupancy of 80.8% and off-peak months of October through February at an average occupancy of 68.5%. These averages were calculated using occupancy rates from 2018, 2019, and 2022 as those three years showed consistencies in hotel performance that were not reflected in 2020 or 2021 given lingering pandemic related travel restrictions.



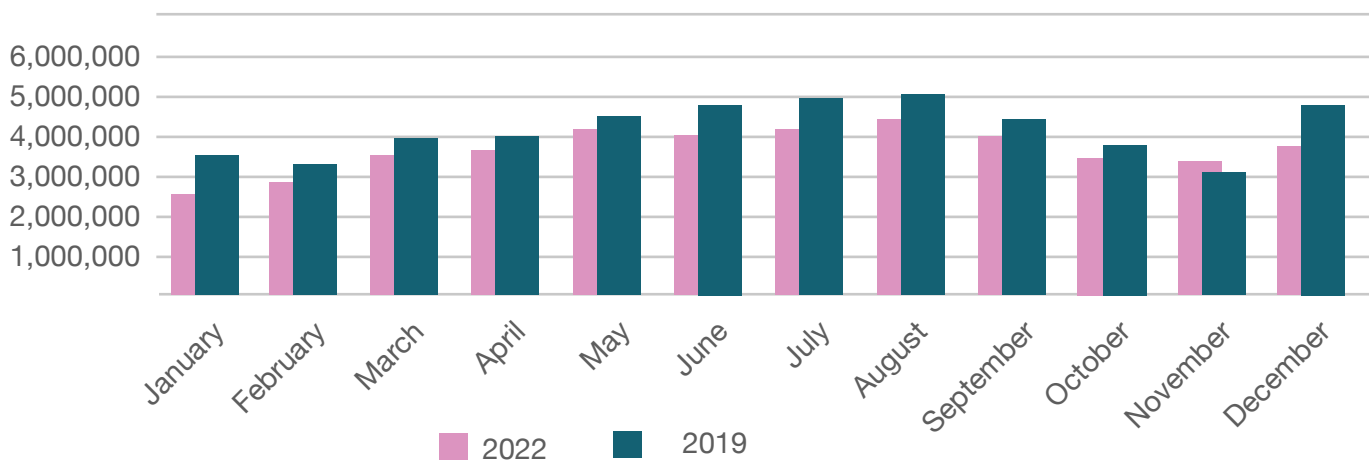
Lodging Performance and Seasonality

Despite the 16.5% difference between peak and off-peak hotel occupancy, occupancy rates are comparatively strong compared to both National and Washington State averages. The seasonal differences and associated monthly shifts in occupancy rates are reflective of the impact of SEA and cruise line passenger volume. These differences highlight the need for Explore Seattle Southside to concentrate on driving demand for the off-peak season and work to extend length of stay for peak season.



SEA Passengers and Seasonality

Passenger counts through SEA reflect the seasonality variances of the region with peak season passenger averages between March and September are 19% higher than off-peak times from October through February. In volume, the average monthly passenger count during peak season months in 2022 was 4,393,103 compared to 3,629,011 in off-season.



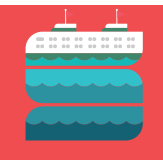
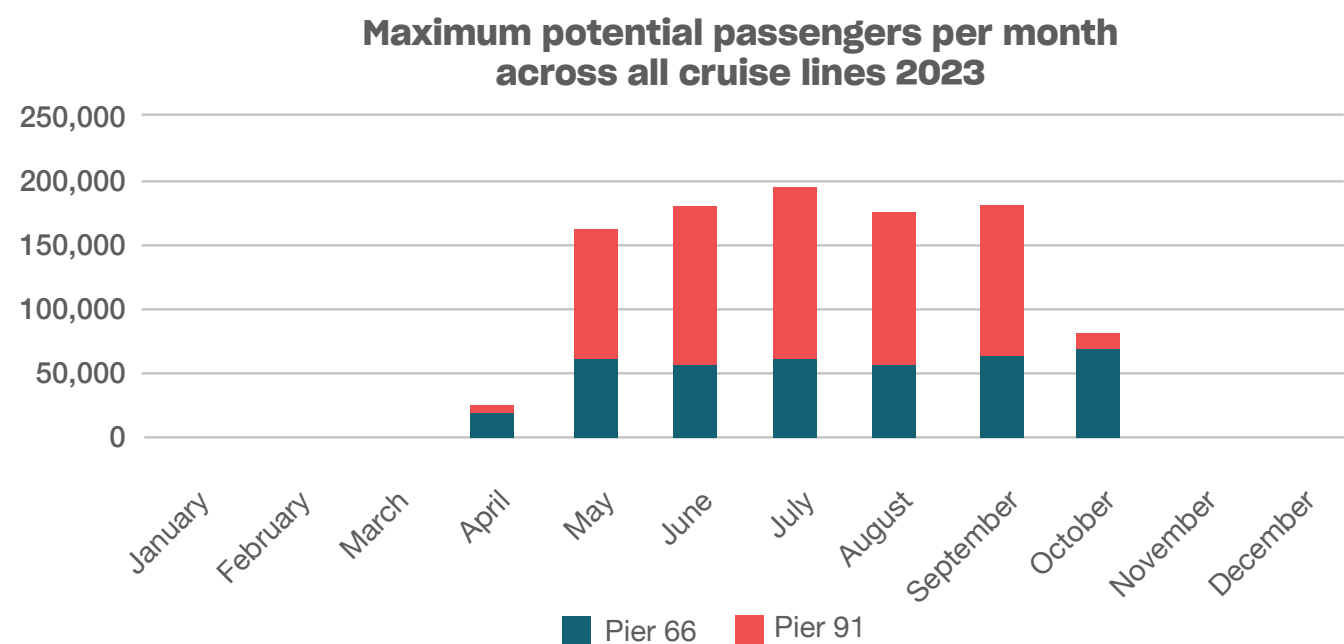
Peak months for travel in July and August welcome 5.3 million passengers in both months. February is the lowest travel volume month at 3.6 million passengers.

Cruise Passengers and Seasonality

Cruise passengers departing out of the Port of Seattle are one definite source for the seasonal shift in business as summer cruise departures form a specific travel motivation for many entering the region. Capacity volume of 2023 provides a glimpse at the importance of the market and its potential impact on business volume. The capacity volume can be categorized through general monthly volume:



The seasonal impact of cruise passengers hits its peak in July with a capacity of 206,339 potential passengers able to depart from either Pier 66 or Pier 91 of the Port of Seattle. The lowest potential volume is April at 24,558 passengers followed by October with 74,024 passengers. There are no cruise departures planned from the Port of Seattle from November to April.



Seasonal variances in business volume impact decision making and planning across Seattle Southside. Additional analysis of visitation and associated trip motivators can help direct resources around need periods. The additional information generated through Capacity-Compression analysis provides a tool for guiding marketing to target audiences and future investments in quality-of-place visitor assets across the three communities. One aspect of this next step is to thoroughly understand the highest potential targets for Seattle Southside.

Traveler Personas

In 2022, Explore Seattle Southside commissioned Destination Analysts to develop a comprehensive overview of the traveler personas that reflected the highest affinity for the region. Through responses received from 1,500 US and 500 British Columbia adult leisure travelers, the following personas emerged as having the great potential fit for the Seattle Southside destination experience in the next three years:



Classic Fun Families
seekers of traditional
family travel experiences



Contrarians
travelers seeking to
get away from popular
destinations and social
scenes



Cruisers
travelers seeking cruise
ship excursions and
experiences



Thrift Seekers
travelers intent on
saving money and
finding value



Trend Seekers
early explorers that
seek to influence
others rather than be
influenced

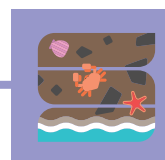


Stakeholder Engagement

As part of the destination planning process, the views of impacts and trends provided through stakeholder engagement offers context and ground-truthing around the needed direction and opportunities facing Explore Seattle Southside. The process for building stakeholder engagement included online input sessions via Zoom, on-site focus groups, one-on-one interviews, and a survey emailed to stakeholders. The small group sessions engaged several stakeholders, including sports, the Impact Group of hospitality sales professionals, managers of the Interlocal Agreement across the tourism promotion area of Des Moines, SeaTac, and Tukwila, the Planning and Economic Development Committee for the City of SeaTac, the Seattle Southside Chamber of Commerce, the SeaTac Hotel Motel Tax Committee, and the Seattle Southside Regional Tourism Authority Board of Directors.

The following topics were explored through verbal input options^{iv}:

- Importance of Explore Seattle Southside
- Importance of tourism development and marketing for Seattle Southside
- Drivers of tourism success across Seattle Southside
- Business needs desired for inclusion within the Plan
- Stories that need to be told about Seattle Southside
- Audiences that need to hear the Seattle Southside stories



The input received is best summarized into four opportunities:

- Need for Explore Seattle Southside to focus on off-peak business growth
- Opportunities for off-season conferences, particularly SMERF, hobbies, and sports
- Corporate base and transportation options as strong assets
- Need for Explore Seattle Southside to promote the brand story of the region

Stakeholder Survey

A stakeholder survey was conducted to extend the input beyond the focus group sessions^v. The digital survey received 34 responses. The survey provided two separate tracks, one for lodging stakeholders, which included a few overnight business specific questions, and one for all other stakeholder types. The input gathered is included here to augment the data from interviews.

Respondent Businesses

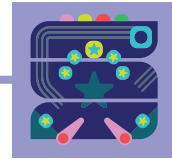
- Lodging – 44%
- Visitor facing attraction – 18%
- Recreation/parks entity – 15%
- Venue for events/performances/sports – 9%
- Restaurant – 9%
- Other – 6%



Although all stakeholders agreed that access & proximity to SEA and ease of access to Greater Seattle and PNW destinations were the top two strengths, lodging stakeholders put stock in affordability and cruises as the secondary strengths while non-lodging stakeholders felt it was the area's diversity, variety of retail options, and access to outdoor recreation.

	LODGING STAKEHOLDERS	ALL OTHER STAKEHOLDERS
Access & proximity to Seattle– Tacoma International Airport	71%	56%
Ease of access to Greater Seattle and PNW destinations	71%	38%
Diverse mix of people and cultures	14%	31%
Variety of retail options	7%	25%
Access to outdoor recreation	7%	25%
Affordability/value offered	43%	13%
Cruise ship activity in Seattle	43%	N/A

The stakeholders did not agree on the challenges facing the destination’s ability to attract overnight visitors. All non-lodging stakeholders ranked a lack of awareness, lack of attractions/experiences, and proximity to Seattle as the top three challenges. The lodging stakeholders’ top four challenges were perceptions of public safety, lack of awareness, lack of attractions/experiences, and lack of unified brand.



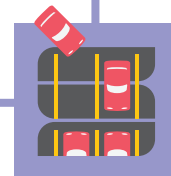
	LODGING STAKEHOLDERS	ALL OTHER STAKEHOLDERS
Lack of awareness about the destination	29%	50%
Lack of attractions/experiences	29%	38%
Proximity to Seattle	14%	38%
Perceptions of public safety in the destination	64%	31%
Difficult to get around	21%	25%
Lack of conference/meeting facilities	25%	7%
Lack of unified brand for the destination	29%	19%

Both groups listed workforce recruitment/retention and rising business costs as their most pressing concerns.

	LODGING STAKEHOLDERS	ALL OTHER STAKEHOLDERS
Rising business costs	57%	63%
Hiring or retaining staff	64%	50%
Increasing costs are limiting disposable income	29%	38%
Increasing the number of visitors to the destination	36%	31%
Reliability or work ethic of existing staff	29%	31%
Lack of unified brand for the destination	29%	19%

When asked about the importance of Explore Seattle Southside in promoting the area to visitors, the stakeholders were asked to rank ten different categories based on their importance to business success.

	LODGING STAKEHOLDERS		ALL OTHER STAKEHOLDERS	
	Not at all important	Critical to Success or Important	Not at all important	Critical to Success or Important
Improving the visitor experience	8%	77%	7%	71%
Promoting Seattle Southside to attract more visitors	8%	85%	0%	70%
Marketing my business or organization to visitors	8%	69%	0%	69%
Creating collateral to enhance the visitor experience	15%	61%	8	50%
Spreading visitation across seasons for more year-round results	15%	85%	0	85%
Supporting events/festivals to draw more visitors to the area	15%	69%	0	69%
Advocating for investments in tourism products & assets	8%	92%	0	85%
Advocating for investments in physical infrastructure	8%	62%	8	69%
Attracting group & sports events to Seattle Southside	15%	77%	0	69%
Building “micro-experiences” for visitors	8%	92%	0	59%



The lodging stakeholders expressed more views than non-lodging stakeholders on those programs that were considered “Not at All Important”. The lodging stakeholders also ranked more program areas higher (over 85%) including promoting Seattle Southside to attract more visitors, spreading visitation across seasons for more year-round results, advocating for investments in tourism products & assets, and building “micro-experiences” for visitors.

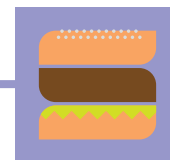


Angle Lake | SeaTac, WA

The lodging stakeholders also identified more areas as critical to success including improving the visitor experience (62%), promoting the Seattle Southside area to attract more visitors (69%), spreading visitation across seasons for more year-round results (77%), advocating for investments in tourism products & assets (69%), attracting group and sports events to Seattle Southside (62%), and building “micro-experiences” for visitors (54%).



Dimension XR | Tukwila, WA



Seattle Chocolate | Tukwila, WA

For non-lodging stakeholders, two program areas stood out as the highest overall priorities, spreading visitation across seasons for more year-round results and advocating for investments in tourism products & assets, while two others, attracting group & sports events to Seattle Southside and supporting events/festivals to draw more visitors to Seattle Southside, were both prioritized as 31% of the respondents ranked them as critical to success.

Stakeholder Survey – Lodging Stakeholders

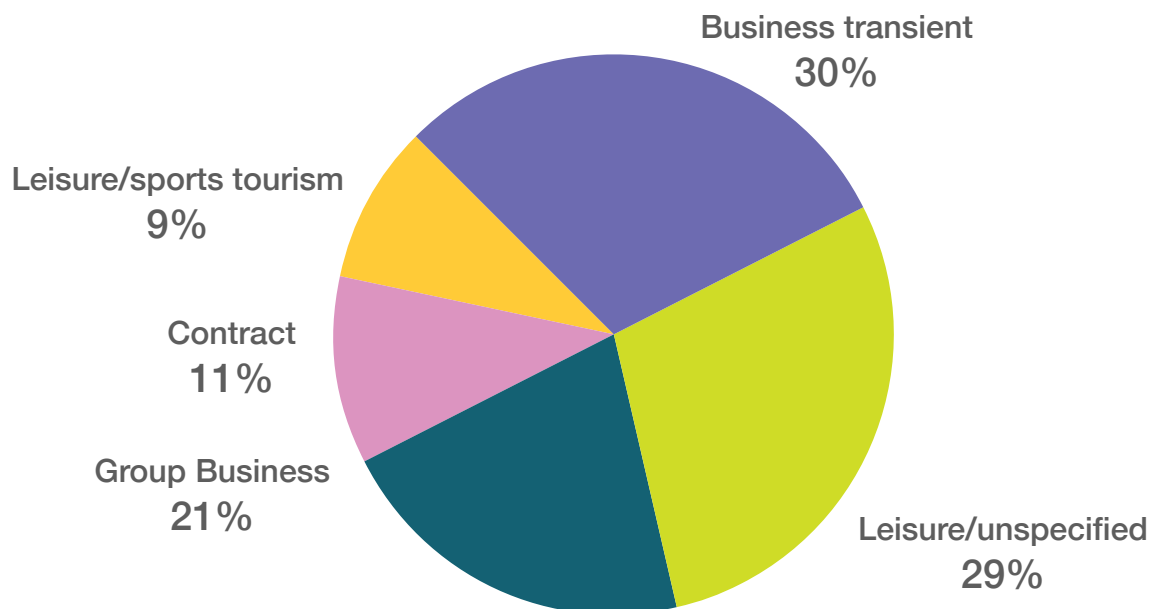
Lodging stakeholders were asked specific questions regarding their business profile.

Twelve properties responded across the following accommodation types:



These properties were asked about their normal travel market mix to understand priorities for Explore Seattle Southside. The percentage of business shows a diversified mix of business occurring in Seattle Southside with business transient (30%) leisure/unspecified - including cruise ship related stays (29%), and group business (21%) being the three leading business segments. Within the hotel business mix, Explore Seattle Southside can play a direct role in impacting business growth in leisure/sports tourism, leisure/unspecified and group business, roughly 59% of the area's overall overnight business mix. Explore Seattle Southside can also play an indirect role in supporting business transient through marketing to area corporations.

Percentage of Business



Comparison of Seattle Southside

Comparative Assessment

In addition to understanding the unique character of the region and telling stories to entice visitors to share in those experiences in the short-and medium term, Explore Seattle Southside sought to use the strategic planning process to understand where the destination stands in comparison to a group of peer and competitive destinations.

To inform that assessment, seven markets that Seattle Southside competes with for visitors were assessed. Comparable destinations were also analyzed.

- For the competitive set—destinations with which Seattle Southside competes for visitors, the assessment focused on the concentration and types of amenities that draw visitors to those areas.
- For the comparative/airport set - the assessment focused more on the hospitality infrastructure in the destination and the comparative destination's ability to leverage visitors coming into their perspective areas beyond their specific region.



Highline Heritage Museum | Burien, WA



13 Coins| SeaTac, WA



Competitive Set

When comparing the Seattle Southside region to the competitive set, the objective of the assessment is to understand how Seattle Southside's destination product compares and how Explore Seattle Southside can position its marketing messages to encourage visitors to choose the Seattle Southside destination.

	Seattle Southside	Portland	Snohomish	Spokane
Demand Driver and Attractions	Urban areas	Urban areas	Outdoor recreation	Urban area
Market activity that drives visitation	SEA, corporate presence, proximity to other assets	Largest urban area in region; neighborhoods, events; arts community	Proximity to outdoor activities; small town feel	Access to outdoor activities/riverfront; access to ski areas; largest urban area in region
Population w/ in 300 mile drive market	11.7 million	12.2 million	11.7 million	11.1 million
Lodging supply	9,200	10, 400 (CBD)	21	7,945
Convention Center	N/A	Oregon Convention Center	N/A	Spokane Convention Center
Destination Organization	Explore Seattle Southside	Travel Portland	Seattle North Country	Visit Spokane



Earthwork Robert Morris | SeaTac, WA

Comparative Set

Recognizing that airport cities share the opportunity to leverage the volume of visitors landing and taking off from their base airport, the Seattle Southside region was compared to those destinations at the core of four airports of similar size and passenger volume to SEA: The goal of the assessment was to compare the hospitality infrastructure that Seattle Southside has in place and the ease of access from the airport to the destination.



	Seattle Southside	Richmond, BC	Bloomington, MN	Atlanta Airport District	San Mateo County
Airport and Airport Passenger Traffic (2022)*	Sea-Tac International (SEA) 25 million	Vancouver International (YVR) 10 million	Minneapolis International Airport (MSP) 19.1 million	Atlanta International Airport (ATL) 53.4 million	San Francisco International Airport (SFO) 27.7 million
Lodging Supply	9,200	4,480	11,020	11,930	9,475
Distance to main downtown	12 miles	7.5 miles	12 miles	9 miles	13.5 miles
Surrounding destinations	Greater Seattle, Pacific NW	Vancouver, BC	Greater Minneapolis – St. Paul	Greater Atlanta	Greater San Francisco
Primary demand drivers/ attractions	SEA, corporate presence, proximity to other assets	Proximity to Vancouver; access to outdoor activities; Night market	Mall of America; Great Wolf Lodge	Georgia International Convention Center; airport access; College Park downtown;	Burlingame and San Mateo; access to San Francisco via BART
Planned infrastructure improvements	\$4.7 B investment in SEA through 2027	N/A	\$2.5 B investment in MSP through 2024	\$5.1 B investment in ATL through 2027	\$7.7 B investment in SFO through 2023
Convention Center	N/A – in house space	N/A – in house space	N/A – in house space	Georgia International Convention Center;	San Mateo County Event Center
Destination Organization	Explore Seattle Southside	Tourism Richmond, BC	Visit Bloomington	ATL District	San Francisco Peninsula

Hotel Supply (rooms by Chain scale)



	Minneapolis	Atlanta	SFO	Seattle Southside
Economy Chains	465	1,950	564	1325
Independents	100	690	998	1,025
Luxury Chains	635		351	
Midscale Chains	3,040	3,290	2,283	2,770
Upscale Chains	6,780	6,000	5,279	4,080
Total	11,020	11,930	9,475	9,200

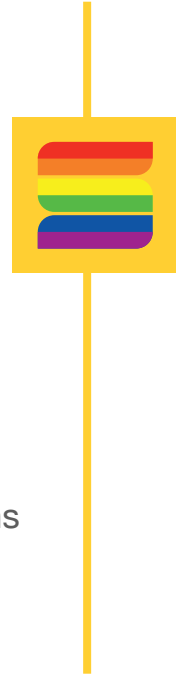


Seattle Southside Strengths, Vulnerabilities, and Opportunities

Strengths

Strengths define opportunities for a destination and within those strengths are areas directly applicable to the operations and programming of the destination marketing organization. The following assets and environment strengths stood out through the overall analysis:

- SEA (Seattle-Tacoma International Airport)
- Port of Seattle cruise lines operations
- Proximity to Seattle & Pacific Northwest
- Regional corporate base
- Strong summer season
- Diversity and cultures represented across the region
- Variety of assets across the three communities
- Lodging options (Supply/rankings/service levels/space)
- Transportation multiple modes
- Westfield Southcenter & variety of retail and dining options
- Soccer base as catalyst for other youth sports



Additionally, Explore Seattle Southside received praise from area stakeholders as several operational and program areas were specifically identified as strengths internal to the organization:

- Stable and healthy funding for Explore Seattle Southside
- Expertise of Explore Seattle Southside team
- Support for cooperative marketing and sales programs
- Ongoing support from Tukwila, SeaTac, and Des Moines
- Success in delivering regional brand messaging
- Professional approach to marketing and business development

Each of these strengths provides a foundational building block for strategy development. Enhancing these attributes, assets, and programs is the recommended approach as the strengths do not need alteration but provide groundwork for on-going success.

Vulnerabilities

Several vulnerabilities were recognized as posing a potential threat to the success and direction of the Seattle Southside area. These elements are not necessarily weaknesses but are potentially threatening to the area's ability to be successful going forward. There are elements that can be influenced by Explore Seattle Southside, specifically:

- Lack of brand recognition and regional awareness
- Regional competition as transient travelers choose to use other cities for a “home base”
- Balancing individual partner needs with larger regional outcomes
- Using data and metrics sets new expectations
- Seasonality and clear need periods



Within these elements, Explore Seattle Southside can adapt strategies and programs to attempt to minimize or ward off these vulnerabilities. There are other vulnerabilities that are outside the span of influence of Explore Seattle Southside. These elements need to be identified and communicated to help build strategies that prepare Seattle Southside to be resilient to each vulnerability.

- Stigma of crime and safety perceptions and realities
- Travel is dependent on perceptions of “Seattle”
- Lack of local attractions to “sell”
- Connectivity among assets
- Hospitality workforce challenges
- Visit Seattle promotion of light rail access to downtown
- Appearance of hotels across the region



Burning Boat Festival | Des Moines, WA

Overall Opportunities

The strengths and vulnerabilities help to highlight notable opportunities for the area and provide a base for strategic recommendations.

- Market intelligence should be leveraged to inform decision making across the destination
- Delivering small gains in off-season business results in huge business impact shifts
- Peak season business is stable, but opportunity exists for driving long stays and more spending
- Sports success requires structural support and quality venues that can compete effectively against other destinations
- Extending the sports opportunity beyond youth events as adult sports can sometimes produce Sunday night stays and greater incremental spending
- Lifestyle, hobbies, and film provide a proven market segment similar in approach to sports
- Leverage sales scholarship program and brand to drive wider awareness of the region
- Volume of corporate transient travel presents relationship building opportunities
- The sheer volume of SEA travelers provides an unmatched market opportunity to capitalize on travelers coming into market
- Utilizing pay to participate programs to expand the Explore Seattle Southside “sphere of influence” into to surrounding communities (i.e., Burien, Renton, Kent) will produce stronger results across all partners
- Leveraging big sporting events coming to metro Seattle (MLB All-Star game, World Cup, NCAA Finals)



Showware Center | Kent, WA



Strategic Recommendations

The strategic recommendations posed for Explore Seattle Southside's direction define the overarching framework that the organization will use to craft individual workplans and business actions for implementation of the strategic plan.

Increase Off-Season Travel

The combination of the April through October cruise season and the higher visitor volume of traditional summer vacation times produces a stable level of peak season business. Conversely, the months spanning from October to March have need periods for hotels within the region. Explore Seattle Southside's promotional campaigns will have a measurable, positive impact on hospitality businesses in the area if even a moderate level of business growth is driven to this off-season period. Additionally, continuing to expand the focused approach to driving off-season business through group business development will elevate stakeholder participation and satisfaction while increasing taxes generated for each locality.

Repositioning the role and nature of sports and lifestyle (hobbies) for Seattle Southside provides one potential opportunity for new off-season business growth. By establishing a focused and supportive promotional approach to help secure more competition related business, Explore Seattle Southside stands to expand the impacts of this overall market segment while also continuing to leverage compression from business booked for downtown Seattle. Upcoming high profile sporting events will drive significant attention for Greater Seattle, so pursuing this approach for Seattle Southside is timely and strategic. This market segment, particularly through focused lifestyle targeting, has the opportunity to produce off-season business that is not dependent upon large-scale venue development investments.

1. Targeting regional travelers and Metro Seattle residents by:

- a. Leveraging seasonal special events as a draw/cause for travel
- b. Encouraging overnight stays for park and fly
- c. Applying personae research to focus on high propensity potential travelers to encourage them to experience Seattle Southside's offerings



2. Promoting off-season group conference, sports, and lifestyle hobby bookings by:

- a. Facilitating discussions with and opportunities for Impact Group partners
- b. Assisting relationship building between the hotels and corporate leaders
- c. Developing a marketing campaign program targeting qualified list of conferences, seminars, and trainings

Extend Peak Season Length of Stay

Peak season (traditionally March-October) business stability should not be taken for granted. Opportunities to grow length of stay and capture regional travelers beyond passengers using SEA or embarking on cruises through the Port of Seattle should be a priority of Explore Seattle Southside. The marketing needed to build this outcome requires pushing suggestions that compel guests and regional residents to want to seek out activities in SeaTac, Tukwila, and Des Moines or easily connection to the greater Seattle area.



3. Leveraging sports and special events as a key component for extending visitors' length of stay
4. Cataloging best practices and aspirational programming of other airport destinations that connect well with Explore Seattle Southside needs and opportunities
5. Proactively marketing attractions beyond the current Interlocal Agreement (ILA) cities of Des Moines, SeaTac, and Tukwila that would serve as additional options for visitors to enjoy during their stay
6. Crafting and spreading stories/content showcasing options for conference attendees, sports participants and spectators, and business travelers to extend their stay or experience more aspects of the destination based on ease of access between hotels and amenities



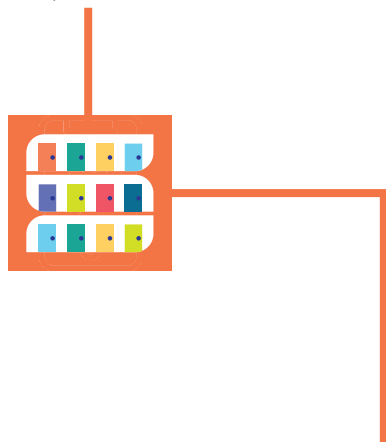
Waterland Festival Parade | Des Moines, WA

Advance the Region's Brand

It is noteworthy to acknowledge that building a recognizable destination brand impacts not only tourism but also employee retention and recruitment. An attractive destination to visit is also an attractive place to live and work. The corporate entities that populate the Seattle MSA may benefit from potential talent recruitment owing to the positive connotations surrounding brand recognition marketing. This, in turn, benefits tourism-related businesses in Seattle Southside with increased business, trainings, conferences, and travel.

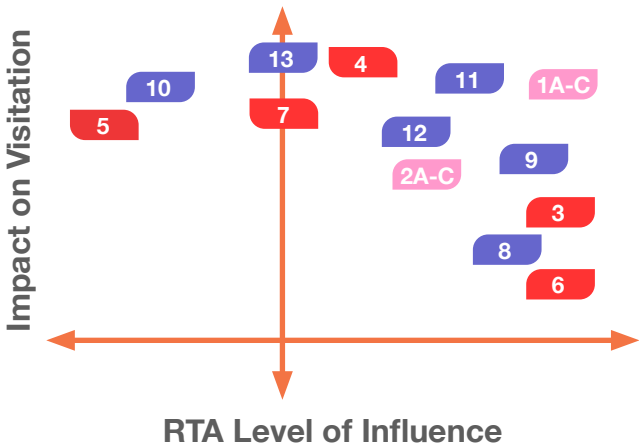
The Impact Group provides a collaborative channel for prospecting and converting area group business. The success of the Business Development Scholarship program as a cooperative outreach function of Explore Seattle Southside provides a great foundation for expanding innovative approaches to destination business development. The role of Explore Seattle Southside becomes more of a facilitator of opportunities instead of the traditional broker of leads. New client relationships are needed by area hotels and a creative approach to leveraging local connections can produce new business for the region.

7. Undertaking a regional initiative to provide toolkits of digital assets to destination partners to optimize the Seattle Southside region's digital footprint
8. Expanding ways that the Explore Seattle Southside's market intelligence could complement the work of partners and stakeholders to promote a positive brand for the region
9. Using communications and new events to champion the value of tourism and demonstrate how tourism promotional activities support regional and community goals (to garner sustained support for the visitor economy)
10. Providing data and market intelligence of potential visitor usage to inform placemaking investments by member communities and private developers and or regional transportation plans and initiatives
11. Developing a program/service for allowing concentrations of attractions in non-member municipalities to participate in marketing efforts to extend visitor stays
12. Collaborating with SEA and the Port of Seattle to market travel amenities, ease of access, and value across the region



Priorities

Explore Seattle Southside has direct influence on most of the strategic recommendations; however, there are specific elements that rely more on partnerships and advocacy efforts. The recommendations have varying levels of impact of visitation. The combined plotting of impact on visitation and level of influence by Explore Seattle Southside sets perspective on how to prioritize the plan’s recommendations.

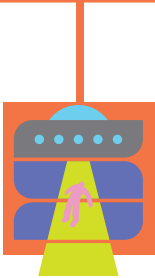


- 1. Targeting regional travelers and Metro Seattle residents by:
 - a. Leveraging seasonal special events as a draw/cause for travel
 - b. Encouraging overnight stays for park and fly
 - c. Applying personae research to focus on high propensity potential travelers to encourage them to experience Seattle Southside’s offerings
- 2. Promoting off-season group conference, sports, and lifestyle hobby bookings by:
 - a. Facilitating discussions with and opportunities for IMPACT GROUP partners
 - b. Assisting relationship building between the hotels and corporate leaders
 - c. Developing a marketing campaign program targeting qualified and targeted list of conferences, seminars, and trainings
- 3. Utilizing persona data to develop and implement a peak season specific marketing and communications approach targeting cruise passengers and summer SEA travelers
- 4. Leveraging sports and special events as a key component for extending visitors’ length of stay
- 5. Cataloging best practices and aspirational programming of other airport destinations that connect well with Explore Seattle Southside needs and opportunities.
- 6. Proactively marketing attractions beyond the current Interlocal Agreement (ILA) cities of Des Moines, SeaTac, and Tukwila that would serve as additional options for visitors to enjoy during their stay
- 7. Crafting and spreading stories/content showcasing options for conference attendees, sports participants and spectators, and business travelers to extend their stay or experience more aspects of the destination based on ease of access between hotels and amenities
- 8. Undertaking a regional initiative to provide toolkits of digital assets to destination partners to optimize the Seattle Southside region’s digital footprint
- 9. Expanding ways that the Explore Seattle Southside’s market intelligence could complement the work of partners and stakeholders to promote a positive brand for the region
- 10. Using communications and new events to champion the value of tourism and demonstrate how tourism promotional activities support regional and community goals(to garner sustained support for the visitor economy)
- 11. Providing data and market intelligence of potential visitor usage to inform placemaking investments by member communities and private developers and/or regional transportation plans and initiatives
- 12. Developing a program/service for allowing concentrations of attractions in non member municipalities to participate in marketing efforts to extend visitor stays
- 13. Collaborating with SEA and the Port of Seattle to market travel amenities, ease of access, and value across the region

Implementation

Strategic plans provide direction over a span of time. It is important to note that the recommendations provided include both short-range actions and longer-range initiatives. These actions and initiatives are made up of “low hanging fruit” that are more easily accomplished and more difficult programs that need time to craft steps towards success. The recommendations can be best visualized across the following timeline:

	2023	2024	2025	2026	2026
Increase off-season travel		1B 1C 2A	1A 2C	2B	
Extended peak season overnight stays	3	4 6 7	5		
Enhance the regional brand		8 9 10	12 11	13	



APPENDIX

ⁱ The 2016-2021 Strategic Plan established the organization’s mission, vision, and goals for that five-year period:

Mission

As a brand-driven and entrepreneurial destination leadership organization, Seattle Southside Regional Tourism Authority (RTA) provides advocacy and innovative services to competitively market the destination. This function helps create jobs, grow tax revenues, and improve quality of life for our businesses and residents.

Vision

To position Seattle Southside as a destination of choice for practical travelers to Seattle while enhancing the image and economic strength of the region.

Goals

1. Increase the number of tourists and groups coming to Seattle Southside with an emphasis on shoulder season. The shoulder season includes dates in the spring and fall on each side of the summer visitor season—October to May. (2015: 3.85 million overnight visitors total)
2. Increase the average length of stay. (2014: 3.4 days; 2015: 2.4 days)
3. Increase visitor spending at businesses within the cities of SeaTac, Tukwila, and Des Moines. (2015: \$665.2 million in travel spending)
4. Demonstrate an increase in the RTA’s return on investment. (2015: \$1/\$21.4)

The plan set five primary strategies for the Seattle Southside Regional Tourism Authority:

- Own the region. Build toward being the destination that visitors and groups know and prefer for accessing everything the Seattle region has to offer, emphasizing the experiences within Seattle Southside.
- Drive value and results through leadership excellence. Be the catalyst for bringing partners together to meet the RTA’s goals.
- Build destination experiences. Create and build on existing experiences to create critical mass and reasons to visit.
- Encourage easy connections to and within Seattle Southside and regional destinations, including light rail, shuttles, tours and more.
- Create a participatory sports focus. Recruit and leverage sports-related experiences to be known as the place for active sports fun.

ii Venues for youth or amateur sports:

Soccer Facilities	7
Grass Fields	9
Turf Fields	17
Indoor	2
Baseball/Softball Parks	7
Grass Fields	23
Turf Fields	3
Aquatic Facilities	8
Aquatic & Dive Center	1
Beach Access	4
Community Pools	3
Sports Courts Facilities - Indoor	13
Basketball	7
Pickleball	4
Sports Courts Facilities - Outdoor	13
Pickleball	7
Tennis	4
Miscellaneous	8
Archery Range	14 lanes; 20 yds each
BMX Tracks & Parks	2
Bowling Alleys	3; 60 lanes
Conference Centers	13+
Disc Golf Course	1; 27 holes
Golf Course	1; 18 holes
Hockey Arena	1; 1 ice sheet
Performing Arts Centers	2

iii Meeting and event venues:

VENUE	SLEEPING ROOMS	FUNCTION SPACE (SF)	LARGEST SPACE (SF)
The Museum of Flight	-	141,000*	62,900
Bowlero Bowl	-	51,000*	2,400
Double Tree by Hilton Hotel Seattle Airport	850	40,000	13,600
Hilton Seattle Airport & Conference Center	396	40,000	11,000
Seattle Airport Marriott	459	23,029	4,600
Cedarbrook Lodge	167	18,100	44,330
Hotel Interurban	189	15,000	4,869
Crowne Plaza Seattle Airport	260	13,529	4,524
Double Tree Suites by Hilton Hotel Seattle Airport - Southcenter	219	12,377	6,100
Des Moines Beach Park Event Center	-	11,000	3,500
Four Points by Sheraton Seattle Airport South	225	10,000	4,327
Embassy Suites Seattle-Tacoma International Airport	238	9,827	2,570
Red Lion Hotel Airport Sea-Tac	144	4,500	1,600
Radisson Hotel Seattle Airport	204	4,027	1,950
Starfire Sports	-	3,800**	1,243
Billy Baroo's at Foster Golf Links	-	3,629	2,125
Courtyard by Marriott Seattle Southcenter	149	2,842	980
SureStay Hotel by Best Western SeaTac Airport North	215	2,412	1,520
Courtyard by Marriott Seattle Sea-Tac	211	2,300	675
Hampton Inn & Suites Seattle-Airport/ 28th Ave	218	1,932	1,288
Comfort Suites Seattle Airport	138	1,596	1,300
13 Coins SeaTac	-	1,580	532

* reflects full facility buyout

** reflects full facility buyout (+54 acres outdoors)

iv The following are categorized and summarized stakeholder input tied to the desired direction for Explore Seattle Southside and the organization's strategic plan.

Regional Impact

- The tourism industry depends on the Regional Tourism Authority (RTA) for visibility of the area.
- Increasing visitors to the community helps our local businesses.
- Seattle Southside is a great destination within the Seattle region. The RTA ensures that we have a voice as they help those hotels that lack the resources to deliver marketing.
- As people are traveling through the area, we want to ensure their overnight stays are here. The work of Explore Seattle Southside raises the economic development in the area.
- Tourism provides jobs for our residents. Our team members run across many different demographic segments.
- Community pride and a sense of community is important. Tourism tax dollars benefit our community from a positive impact and enrich the lives of our locals.
- The RTA helps reimagine this region of King County and build up investment in the community by working to expand tourism-related commercial operations.
- Explore Seattle Southside is working. Don't break it just to fix it. Add to it.
- The team at Explore Seattle Southside provides valued partnership, mentorship, and networking connections. Through site visits they help build an understanding of the buyer's needs.

Seasonality & Business Need Periods

- How do we extend length of stay?
- Explore Seattle Southside helps out with the need periods by driving additional business. They must continually understand and fill gaps.
- Fully agree with expanding beyond summer. Niche for tour and travel. SeaTac expansion provides us the opportunity to be a home base/launching pad.
- Need to explore new and different business to help focus on seasonality needs.

Sports

- Connection to Seattle Sports Commission is changing as the region hosts mammoth scale events (2023 MLB All-Star Game, World Cup 2026, and a to-be-determined NHL All-Star Game by 2028), but the focus is not specifically on the needs of Seattle Southside.
- Both Starfire and Des Moines Parks and Recreation are working with a STEM mandate to incorporate education into programs. The story of sports is part of the message.
- Marketing resources for new business are somewhat limited given the current level of demand for facilities and staffing challenges.

Sports (continued)

- Sports organizations are making a concerted effort to not displace local business and are communicating compressed dates to the RTA.
- Data sharing (Near & Zartico) will be important for future decision making as travel patterns of sports teams and spectators becomes more visualized.
- Ties to transportation are vital to ongoing success.
- Partnerships are valued with the example being Starfire's recent relationship with Highland College.

Target Audiences

- Helping local companies realize the options that are here.
- Lean into niche markets and venues. We have brought in new development, and it builds off those assets.
- Military reunions reacted to Seattle being in the news but came anyway. Portland undercuts Seattle rates heavily as they struggle to reemerge in the market.
- International is a growth opportunity as it returns but the market needs experiences.
- Opportunity with youth and Olympic sports across multiple segments. We have done a good job building markets, but not from local connections. Need to build beyond locally focused festivals.
- Business travel has not seemed to return at the right rate. How can we help grow this?
- Aerospace, manufacturing, engineering, and logistics/freight are vital industries for this region of Seattle.
- The region is strong for SMERF and hobby (Tarot card, doll show, etc.).
- There is a challenge with hosting tour groups based on strong performance of the area.
- The team at Explore Seattle Southside helps our communities think from the perspective of a target audiences.
- Resident and City Council awareness of Explore Seattle Southside needs to continue to grow through building trust and showing off the digital presence.
- The size of the Explore Seattle Southside service area needs to expand beyond the current three cities. Build a track record of success and then expand through contracts for specific services.
- Opportunity exists for this region to communicate across generations.
- Washington feeder cities provide an opportunity for ongoing business.

Branding & Image of the Region

- Our area has so much that can be discovered.
- Pandemic provided a new opportunity for us to become a hub, especially given how this area fared versus downtown Seattle. We have opportunities for more product development and more beautification.

Branding & Image of the Region (continued)

- Community pride and a sense of community is important. Tourism tax dollars need to benefit our community from a positive impact by enriching the lives of our locals.
- Business mix is interesting, but the natural beauty adds to our attractiveness.
- Explore Seattle Southside helps to expand the community's brand and identity by understanding our area's competitive advantages.
- The image of safety across the community is a concern. Work on the area's image and manage the perception of crime and safety.

Promotions & Marketing

- The region's tourism industry relies on raised awareness created by Explore Seattle Southside.
- Part of the messaging is ease - Ease of access, ease of available assets.
- The team has been successfully telling local stories on buses. Celebrating arts is an opportunity.
- Convenience, cost effectiveness, and ease of mobility as the story.
- The region provides an ease of bringing people together.
- Brand and image development depends on content and marketing around the digital presence.
- There is an opportunity for marketing the distinct neighborhoods as individualized areas within the region.

Sales & Business Development

- Explore Seattle Southside has morphed into a valuable resource by using collaboration to help hotels transition through difficult times. They help hotels attract groups by offering photography, tradeshow, information, and targeted marketing materials. Explore Seattle Southside invests in needs of the hotels.
- Relationships are really needed. How do we rebuild the connections to our corporations?
- Sports continues to change as travelers are using hotel blocks, but not necessarily stay and play. Connections to Seattle Sports Commission are changing.
- Groups show promise and growth.

Opportunities for the destination

- Safe, cleaner option to downtown Seattle. Seattle Southside can highlight neighboring assets to expand beyond the one overnight. Corporate market expansion is not likely for this area.
- The area has advantages in cost effectiveness and ease of mobility. Airport hotels have advantages with proximity to Mall (Westfield) assets and convenience to light rail, especially around sports.

Opportunities for the destination (continued)

- Wide variety of options. Diverse group of businesses.
- The expansion of the airport has been enormous. Hub for Star Alliance (Delta) & One World (Alaska). Leisure is driving business. Group growth is the projection for the future. Business transient is back to producing record levels.
- Our easy access to Seattle helps bring opportunities to overcome perceptions of safety and crime.
- Soccer – Starfire and Sounders home are huge opportunities. Blue Origin is a new opportunity. City work on beautification projects is appreciated and noted.
- The diversity of business is making us strong so if market segment goes down other areas step in to generate. Role of essential business to continue to drive demand. Current sustainability movement seems to finally be taking hold. Still a natural reminder that nature is there (Mt. Rainier). Diversity of food choices is amazing in the area.
- Shopping, sports, and things to do, especially the Museum of Flight. Businesses, restaurants, boutiques have really grown in the region.
- The region’s tourism industry relies on raised awareness created by Explore Seattle STEM opportunities are the mandate going forward including Starfire and soccer.
- Marina development and ferry expansion are distinct opportunities for this region.
- The area has an opportunity to expand regional context as it transitions from suburban center to more urbanized offerings.
- Events provide opportunities for each community.
- BMX, the Botanical Gardens and connecting to Native American culture are assets that can be leveraged.
- Explore Seattle Southside builds partnerships based on accuracy, authenticity, and transparency. Don’t mess it up.
- Guests to the area are aware of the hotel shuttle to Westfield. It could be marketed to other audiences.
- Museum of Flight is a unique asset for the area but is on the fringe of the regional footprint and lacks ease of access. It can offer more value to stays, particularly given its expansive meeting space.
- The shuttle from hotels to Westfield is great, but we need to do more to encourage use. It provides an Incentive for visitors and regional residents to explore the region.

^v The following individuals participated in the Explore Seattle Southside stakeholder engagement:

Explore Seattle Southside Board members

- Kelly Droll, Courtyard by Marriott Seattle/Southcenter
- Josh Ewing, DoubleTree by Hilton Hotel Seattle Airport
- Meredith Mara, Columbia Hospitality

Explore Seattle Southside Board members (continued)

- Annie McGrath, Seattle Southside Chamber of Commerce
- Angela Mose, Four Points by Sheraton Seattle Airport South
- Bob Schrader, Seattle Airport Marriott
- Ken Stockdale, Crowne Plaza Seattle Airport

City Partners

- Tanja Carter, Formerly City of SeaTac
- David Cline, City of Tukwila
- Carl Cole, City of SeaTac
- Mohammed Egal, City of SeaTac Councilmember
- Tim George, City of Des Moines
- Takele Gobena, City of SeaTac Councilmember
- Kristina Gregg, City of SeaTac
- Iris Guzmán, City of SeaTac Councilmember
- Peter Kwon, City of SeaTac Councilmember
- Michael Matthias, City of Des Moines
- Evan Maxim, City of SeaTac
- Brandon Miles, City of Tukwila
- Senayet Negusse, City of SeaTac Deputy Mayor
- Jake Simpson, City of SeaTac Mayor
- Erin Sitterley, City of SeaTac Councilmember
- Derek Speck, City of Tukwila
- Gwen Voelpel, City of SeaTac
- Aleksandr Yeremeyev, City of SeaTac
- Ashley Young, City of Des Moines

Stakeholders

- Linda Akey, Competent Assistance for Non-Profits
- Jill Andrews, Destination Des Moines
- Quinn Apuzzo, Recology King County
- Jeff Bauknecht, The Museum of Flight
- Karen Bowles, Hilton Garden Inn Seattle Airport
- Mike Bulleri, Baker Commodities Inc., Seattle Division
- Judy Coover, Printcom, Inc.
- Steven Dahl, Starfire Sports

Stakeholders (continued)

- Brian Frederick, Mainspring Wealth Advisors
- Yvonne Gooden, SeaTac BMX
- Jennifer Hansen, BECU Financial Cooperative
- Tiffany Hart, Marriott International
- Johan Hellman, BNSF Railway
- Genevieve Henderson, BMI Hospitality
- Maureen Huffman, Embassy Suites Seattle-Tacoma International Airport
- Scott Kennedy, Alaska Airlines
- Samantha Le, Seattle Southside Chamber of Commerce
- Wendy LeBlanc, Doubletree Suites by Hilton SeaTac
- Darcel Lobo, DAL Law Firm
- Julien Loh, Puget Sound Energy
- Steve Novalk, Wingate by Wyndham
- Ben Oliver, Starfire Sports
- Byron Pihuave, Cedarbrook Lodge
- Danielle Pineda, Residence Inn by Marriott SeaTac Airport
- Geno Rosellini, MasterPark Lot C
- Nancy Salguero McKay, Highline Heritage Museum
- Scott Schaefer, South King Media
- Rich Scherzinger, Hilton Seattle Airport and Conference Center
- Kelley Talbot, Starfire Sports
- Ryan Tomasich, The Boeing Company
- Valerie Woods, Crowne Plaza Seattle Airport
- Russell Woolley, Highline Medical Center

Explore Seattle Southside Staff

- Ashley Comar, Vice President Marketing and Communications
- Noelle Cueto, Business Development Manager
- Sage Dahring, Marketing Specialist
- Mark Everton, President & CEO
- Christy Maggio, Marketing Coordinator
- Cydney Marks-Nicholes, Sports Business Development Manager
- Meagan McGuire, Vice President, Business Development
- Jeff Powell, Communications Manager
- Sean Puno, Creative Services Manager
- Rex Price, Digital Marketing Manager