

SNOHOMISH COUNTY STRATEGIC TOURISM PLAN STAKEHOLDER ENGAGEMENT REPORT

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RESONANCE

November 21, 2016



OVERVIEW

Over the course of three days (Oct 19-21, 2016), Resonance Consultants Chris Fair and Richard Cutting-Miller met individually and in group sessions with approximately 50 stakeholders of the Snohomish County Travel & Tourism industry. Resonance also produced an online survey from Nov 11-18 for 43 stakeholders.

The primary purpose of these discussions and the survey was to identify high-level issues and opportunities critical to the success of the Strategic Tourism Plan project and to build an informal group of “champions”, which will be critical to the endorsement and implementation of the strategy upon completion.

The discussions lasted between 45 and 75 minutes each and tended to focus on:

1. Analyzing current market conditions and identify appropriate opportunities and targets for improvement.
2. Reviewing the current Strategic Tourism Plan and identifying significant results and any outstanding initiatives that should be continued.
3. Identifying any emerging / new opportunities as they relate to areas of marketing, product development and infrastructure development.
4. Assessing the current brand and effectiveness of brand collateral.

The results of these discussions have been recorded and summarized by Resonance to help identify, innovate, create and articulate unique products, amenities, programming and experiences – along with the policies and protocols required – to guide the long-term planning and design of Snohomish County as an important tourism destination.

To encourage an open and honest discussion, stakeholders agreed that all conversations would be confidential; and the only attribution of comments would be to the collective “stakeholders”.

Stakeholders’ individual comments were recorded and filtered based on the stakeholder’s knowledge, experience, involvement with Travel & Tourism in Snohomish County, insight, awareness, specificity and frequency, and summarized into issue area findings. Details for each topic follow in the next section of this report.

The process used to summarize the comments received and conclusions made by Resonance Consultancy was based on:

1. How often the feedback / comment was received from stakeholders.
2. The expertise of the stakeholder and / or the level of relationship between the stakeholder and the project partners and / or tourism industry in Snohomish County.



For example, if a stakeholder had a distant relationship to the project partners or tourism industry and made a comment that was not repeated by others, it was not included in the summary. However, if a stakeholder with a high level relationship to the project partners or the tourism industry made a comment that was not repeated by others, it was weighted as important and therefore included in the summary.

This feedback was then grouped together into Strengths, Weaknesses, Opportunities and Threats (see below).

These findings reflect the consultants’ expert opinion of the overall messages being conveyed by the compiled comments. However, as with all qualitative research, alternative findings may result from different interpretations, different prioritization of the comments or a different consultant – and because this effort has been limited in scope to qualitative stakeholder analysis – the findings should not be considered absolute or definitive. Instead, they should be considered indicative of stakeholder opinions or general frame of mind.

Strengths

- Breweries
- Day Trippers
- Outdoor Recreation
- Seattle’s Playground / Backyard

Weaknesses

- | | |
|-----------------------------------------------|-----------------------------------------------------------|
| Business Start Up and Permits | Sports Tourism |
| Capital Improvement | Strategic Plan Programs |
| Everett Nightlife | Tourism Bureau Funding |
| Infrastructure and Facilities | Tourism Cooperation |
| Professional Marketing | Tourism Funding Sources |
| Rural Internet and Cell Phone Service | Tribal Engagement |
| Seasonality | Visitor Capacity Planning / Traffic / Transportation Plan |
| Second Homes / Weekend Homes / Vacation Homes | Visitor Research |
| Social Media Capacity Building | Wayfinding |
| Sports Facilities | Website Design |



Opportunities

Biking Trails, Facilities, Infrastructure, Amenities and Transport
Branding
Capacity Building
Cascade Loop (Signature Attraction)
Commercial Air Service
Event & Festival Strategy
Food Trucks
Harbor / Boating Tourism

International Visitors
Information Centers and Distribution
Institute of Flight and Boeing Tour
Locally Made
Mountain Loop Highway
New Developments / Parks
Tourism Focus / Identity
Trails and Trail Town Connectivity
Visitor Itineraries
Water Trails / Biking Trails / Hiking Trails

Threats

Exchange Rate
Washington State Tourism Office

Summary of Issues and Opportunities

In the interviews, group sessions and online survey, stakeholders have noted, suggested, or indicated that:

Biking Trails, Facilities, Infrastructure, Amenities and Transport – there may be an opportunity to significantly increase biking related visits thru the development and enhancement of signature bike trails (such as Centennial), new bike trails (such as The Sky Valley Trail), biking facilities, infrastructure, amenities and transport.

Branding – there is need to educate / re-educate industry players about the brand (Open Up) and engage them to use and / or better implement the brand. Also, Snohomish County needs to review the strengths and weaknesses of its branding association with Seattle. For example, several Snohomish County hotels carry Seattle in their name: “Hampton Inn Seattle/Everett” or “TownePlace Suites Seattle Everett/Mukilteo” or “Courtyard Seattle North/Everett”.

Breweries – there may be an opportunity to increase visitor focus, activities and spending on Snohomish County breweries as well as provide / deliver a breweries map / tour / app that facilitates the breweries visitor experience.

Business Start Up and Permits – there may be a need to speed up or fast track the business start up and permitting process for new tourism activities, attractions, accommodations and food / beverage operators, especially in the eastern part of Snohomish County where tourism amenities are limited and tourism potential is high.

Capacity Building – there may be an opportunity for the County and the Tourism Bureau to provide tourism capacity building services to towns, cities, organizations and private sector operators, especially SMEs to help build, enhance and grow their tourism products and services. Hoteliers may also benefit from orientation to existing tourism activities that are available to their guests.

Capital Improvement – a number of private tourism operators in Snohomish County could benefit from capital improvement incentives or programs.

Cascade Loop (Signature Attraction) – there may be an opportunity to enhance / highlight the Cascade Loop as a Signature Attraction that all visitors to the Pacific NW must take.

Commercial Air Service – there may be an opportunity to increase Snohomish County tourism as a result of direct air access to Paine Field. The connection and synergies between commercial air access and Snohomish County tourism needs to be better understood and planned.

Day Trippers – although overnight visitors and their higher per capita spending are a key priority for Snohomish County tourism, the spending by day-trippers makes a significant contribution to total spending. There may be an opportunity to focus greater resources, effort, and marketing on this important market segment.

Event & Festival Strategy – Snohomish County should consider creating a countywide Event & Festival Strategy that engages the County, towns, cities and stakeholder groups to develop, schedule, enhance, incubate, direct, market, promote and manage a portfolio of events and festivals for residents and visitors alike.

Everett Nightlife – there may be an opportunity to create a nightlife scene in downtown Everett, but it would require research, analysis, strategy and delivery.

Exchange Rate – there is a significant threat posed to Snohomish County tourism resulting from an unfavorable exchange rate with the Canadian dollar.

Food Trucks – there may be an opportunity to work with the Food Truck Association and Snohomish County Dept. of Health to increase the numbers of food trucks in Snohomish County - especially East County.

Harbor / Boating Tourism – there may be an opportunity for greater focus on harbor visits in Everett and other Snohomish County ports / marinas as well as increasing boating / sailing tourism in general.

International Visitors – the market for international visitors (Asia/Pacific, Europe, China etc.) is growing to regional destinations such as Seattle, Portland and Vancouver BC, as well as to local attractions / activities such as the Boeing Tour. Snohomish County needs to be prepared to deliver broader visitor opportunities and culturally sensitive service to these international visitors. There is a real opportunity for the STB to produce and distribute a foreign language friendly website and various marketing materials to this growing market.

Information Centers and Distribution – there may be an opportunity to enhance visitor information distribution through alternative sources / locations as well as online and mobile applications.

Infrastructure and Facilities – there may be an opportunity to achieve greater synergies between Snohomish County infrastructure and facilities (funding and development) and tourism needs / demands.

Institute of Flight and Boeing Tour – The Institute of Flight (an independent, 501(c)(3) nonprofit organization) manages the airport facility that contains the Future of Flight Aviation Center and is the front and back door to the Boeing Tour. The Future of Flight facility is partially funded by the Snohomish County Public Facilities District. Although the Boeing Tour and the Future of Flight Aviation Center co-habitate, their missions and objectives do not necessarily or always align. Based on conversations with stakeholders:

- The facility may require new / greater investment to keep up with traffic / parking growth and demand for exhibits that are up to date, attractive and engaging. Current standards for non-Boeing elements are not satisfactory.
- The county may need to engage a professional museum / retail / operations consultant to review existing facilities, operations, exhibits and shops to create a forward-looking strategy.
- The county may need to re-assess the PFD status of the Aviation Center to determine if the current management structure is the best use of resources.
- The Future of Flight Aviation Center may be confusing to visitors who are primarily there to take the Boeing Tour.
- The revenue sharing arrangement between the Institute of Flight and Boeing is confusing and may require clarification and greater transparency.
- Connectivity between the Future of Flight Aviation Center and the Historic Flight Foundation, Paul Allen's Flying Heritage Collection, and the Museum of Flight Restoration Center may require future assessment to fully realize the potential of all aviation attractions.



Locally Made – there may be an opportunity to assist local artisans, SMEs, agritourism providers, breweries, distilleries, and other “local” businesses to create and market locally made products that attract and appeal to visitors.

Mountain Loop Highway – there may be a significant opportunity to increase Snohomish County tourism by paving the remainder of Mountain Loop Highway.

Outdoor Recreation – there may be an opportunity to create and implement an outdoor recreation master plan for Snohomish County that creates significant opportunity for growing the tourism industry, addresses some of the limitations caused by diminishing access to US Forest Service lands and provides funding across city/town lines. One major areas of focus should include review, analysis and recommendations on motorized recreational use.

New Developments / Parks – there may be an opportunity to celebrate and facilitate new developments and parks in Snohomish County including, but not limited to, Japanese Gulch, where the City of Mukilteo has recently released a new Master Plan and the Port of Everett's Waterfront Place Central redevelopment project, which is set to unify the marina and surrounding property with a sustainable and unique commercial, recreation and residential community.

Professional Marketing – there may be an opportunity to engage a professional marketing firm to review and assess programs and activities of Snohomish Tourism Bureau to offer constructive advice, enhance creativity and increase return on investment.

Rural Internet and Cell Phone Service – there are areas frequented by visitors that do not have internet and / or cell service in Snohomish County, which limits connectivity for visitors and business opportunities for operators.

Seasonality – Snohomish County does extremely well during the peak months of May through September, but has an even greater opportunity for growing tourism in the shoulder and off peak season of October through April.

Seattle's Playground / Backyard – there may be an opportunity to highlight and intensify Snohomish County as “Seattle's Playground / Backyard”, focusing on the rural, natural and recreational opportunities for Seattle residents and visitors.

Second Homes / Weekend Homes / Vacation Homes – the second / weekend / vacation home market in Snohomish County is not well understood, who owns, how often they are used, how they are used and what they contribute to tourism. There may be an opportunity to learn important information about this market that could enhance tourism in the region.

Sports Facilities – there may be an opportunity to achieve greater synergies between Snohomish County tourism, especially sports tourism, and Snohomish County sport facilities. The County should consider the creation of a sports facilities master plan.

Sports Tourism – there may be an opportunity to achieve greater synergies between Snohomish County Sports Commission and the Snohomish Tourism Board. Snohomish County should review the potential for athletic events that may present a competitive advantage such as a Boston Marathon qualifying race, race on a “live air strip” or creating a Snohomish version of the Vancouver to Whistler GranFondo.

Strategic Plan Programs – there is a need for greater flexibility of Strategic Plan program timing, funding and responsibility to allow for changing and unexpected circumstances.

Tourism Bureau Funding – there is a need for greater financial security and predictability of funding for the Snohomish Tourism Bureau to provide for better and more consistent planning and operations. The Bureau may also benefit from a longer-term contract, as a one-year contract is not conducive to long-term planning.

Tourism Cooperation – there is a strong need for greater coordination, collaboration and cooperative programs between Snohomish County, Snohomish Tourism Bureau and the tourism / chamber leaders from the individual towns, cities and Native American communities of Snohomish County including but not limited to regular communications, meetings, committees, working groups, roundtables etc. Cooperative efforts might focus on infrastructure development, festivals and events, marketing efforts, website design and functionality, itineraries, capacity building, etc. The same is true for greater coordination and collaboration with neighboring counties including Skagit and Winthrop Counties.

Tourism Focus / Identity – Snohomish County should consider the potential for greater tourism development focused on a short-list of activities / identities such as: Outdoor Recreation, Seattle’s Playground, Aerospace Capital, etc.

Tourism Funding Sources – there may be an opportunity to rationalize and coordinate the various tourism funding sources (Small Fund, Large Fund, LTAC, TPA, etc.) and / or processes to achieve greater overall synergies and results for the County.

Trails and Trail Town Connectivity – there may be an opportunity to focus and apply greater resources and attention on recreational trails (land and water) and trail town connectivity and development in Snohomish County to realize even greater return on investment.

Tribal Engagement – there may be an opportunity to engage and deepen the tourism business relationship with tribal officials, communities and businesses to increase the levels of communication and cooperation.

Social Media Capacity Building – there may be an opportunity to build capacity for use of TripAdvisor and other social media to enhance and raise the level of visibility of Snohomish County tourism operators and opportunities with consumers.

Visitor Capacity Planning / Traffic / Transportation Plan – there may be an opportunity to better manage traffic, ease congestion, create more ride-sharing programs between urban and rural areas and carry out capacity planning on certain visitor routes / highways (ie US Route 2 from Everett to Leavenworth) or certain destinations (ie National Forest) during peak season, as well as promote alternative routes and lesser known destinations to distribute visitor traffic. This could be part of a broader Visitor Transportation Plan for Snohomish County.

Visitor Itineraries – there may be an opportunity to better promote “itineraries” to provide more options and ideas for people visiting Snohomish County. Itineraries might include: culinary, breweries, biking/hiking, antiquing, farms, arts, historical sites / assets, nightlife, etc.

Visitor Research – there is a need to better understand Snohomish County visitors such as: who they are, where they come from, what they do here, etc. Stakeholders could benefit from detailed visitor tracking research, which shows how visitors consume Snohomish County, especially off the I-5 corridor.

Washington State Tourism Office – although Snohomish County does not have influence over the Washington State government agenda, agencies or funding, the closure of the Washington state Tourism Office in 2011 has created a competitive weakness for Snohomish County tourism vis-à-vis other counties in other states that do have a statewide tourism office.

Water Trails / Biking Trails / Hiking Trails – there may be an opportunity for greater development, utilization and tourism impact from Snohomish County recreational trails such as The Sky to Sound Water Trail, Whitehorse Trail and others.

Wayfinding – there may be an opportunity to increase and improve wayfinding that is authentic to the “rural experience”.

Website Design – there may be an opportunity to improve and enhance the Snohomish Tourism Bureau website to achieve greater visitor appeal, mobile functionality and real-time marketing/sales opportunities.



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