



BUILDING A SUSTAINABLE TOURISM INDUSTRY

SNOHOMISH COUNTY, WASHINGTON

December 2018



BUILDING A SUSTAINABLE TOURISM INDUSTRY

Snohomish County, Washington

June 21, 2018

**Including a combined analysis of the Regional Think-Tanks held on June 18-21, 2018
and a Summary of key Stakeholder Engagement.**

This report includes a summary of the scenario-based planning sessions held in Snohomish County's four experiential visitor regions during the week of June 18, 2018. Approximately 240 Snohomish County stakeholders participated in the Think-Tanks. Together, with the Snohomish County Tourism Bureau (SCTB) and the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) these small businesses, non-profit organizations, local, state and federal agencies, elected officials, community members and leaders developed scenarios presented in this report. This report has been produced as part of the SCPRT and SCTB Sustainable Tourism Development Initiative, which aims to produce a Sustainable Destination Management program to support the 2018-2022 Strategic Tourism Plan (STP) and guide regional tourism activities for the next five to ten years.

REPORT PREPARED BY:

future→iQ®

THINK TANKS HOSTED BY:



TABLE OF CONTENTS

1.0	Introduction	4
2.0	Key Building Blocks for the Snohomish County Tourism Industry.....	5
2.1	Regional Approach	6
2.1.1	Defining the Four Snohomish County Visitor Regions	6
2.1.2	Importance of a Regional Approach	7
2.2	Collaboration and Connectivity.....	8
2.3	Sustainability Focus	9
2.3.1	Importance of Sustainable Tourism.....	10
2.3.2	Current Performance on Sustainable Tourism	11
2.3.3	Most Impactful Dimensions of Sustainable Tourism Development	12
3.0	Think-Tank Process and Outcomes.....	13
3.1	Creating the Hypothetical Scenario Framework.....	14
3.2	Regional Scenario Commonalities and Differences.....	15
3.3	Expected and Preferred Futures	16
3.3.1	Expected Future: Scenario D	16
3.3.2	Preferred Future: Scenario B.....	17
3.3.3	Closing the Gap – Getting to the Preferred Future.....	18
3.3.4	Brainstorming Regional Action Ideas.....	19
4.0	Building a Sustainable Tourism Industry – A Future Perspective.....	20
4.2.1	Importance of Improving Overall Visitor Experience	21
4.2.2	Important Factors Shaping Visitor Experience.....	22
4.2.3	Importance of Improving Local Residents Relationship to Tourism	23
4.2.4	Key Drivers Shaping Residents’ Relationship to the Tourism Industry.....	24
4.2.5	Anticipated Snohomish County Tourism 10-Year Evolution.....	25
4.2.6	New Characteristics Defining Sustainable Tourism	26
5.0	Perceived Value of the Scenario Planning Process	27
5.1	Importance of Tourism Development Planning	28
5.2	Top Three Takeaways from the Tourism Think-Tanks	29
6.0	Acknowledgements	30
7.0	For More Information	31
8.0	About Future iQ	32



The four regional Snohomish County Think-Tanks provided an exciting opportunity for area stakeholders to take a 'deep-dive' into how to collectively consider their tourism futures

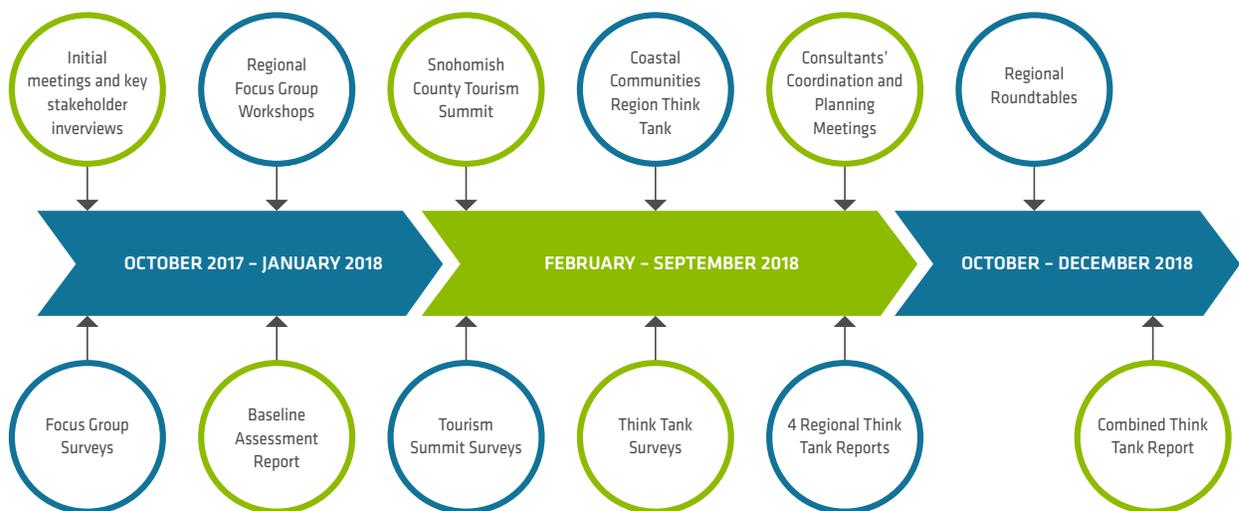
1.0 INTRODUCTION

The four regional Snohomish County Think-Tank workshops were conducted as part of a project to implement the 2018-2022 Strategic Tourism Plan (STP) by the Snohomish County Department of Recreation and Tourism (SCPRT) and the Snohomish County Tourism Bureau (SCTB). The Think-Tanks were held in June 2018 with the purpose of allowing stakeholders the opportunity to explore hypothetical scenarios for the future of the tourism industry in Snohomish County. This scenario-based Think-Tank report combines and summarizes the outcomes of all four regional Think-Tanks.

Some highlights of the project engagement process include:

- Identification of four major experiential visitor regions (November 2017)
- Baseline Assessment Report compiling the results of Regional Focus Group Workshops and surveys (January 2018)
- 2018 Snohomish County Tourism Summit (May 2018)
- Four industry-based regional Think-Tanks (June 2018)
- Regional Roundtable Branding Workshops to further define the *Seattle NorthCountry*, *True PNW* brand (October 2018)

2017-2018 Project timeline





2.0 KEY BUILDING BLOCKS FOR THE SNOHOMISH COUNTY TOURISM INDUSTRY

The 2018-2022 Snohomish County Strategic Tourism Plan (STP) serves as the foundational document for tourism development in the County. In order to put the plan into play, industry sector leaders need to agree on how to do so. The stakeholder engagement process for this stage of the project culminated with the Think-Tanks and produced suggested action items created by industry stakeholders themselves. The high level of alignment on how to achieve a preferred future throughout the regions is indicative of the enthusiasm and goodwill towards the anticipated outcomes of this process.

In addition to the events leading up to the Think-Tanks, a Baseline Assessment and four surveys were conducted. The data from the Baseline Assessment Report and surveys is integrated throughout this combined report. Specifically, the surveys conducted were:

- 2017 Snohomish County Tourism Survey – Focus Group Workshops
- Snohomish County 2018 Tourism Summit Survey
- Snohomish County Tourism Think-Tank Survey
- Snohomish County Regional Tourism Future Think-Tank Feedback Survey

The data collected by this extensive engagement and input by industry leaders indicate three foundational building pillars for the industry: support for a regional approach, collaboration and connectivity, and a sustainability focus. This report will explore how the Think-Tanks helped to confirm these three pillars and what industry leaders suggest as potential actions to achieve the preferred future for the County.



Three Snohomish County sustainable tourism development foundation building blocks:

- A regional approach
- Collaboration and connectivity
- Sustainability focus

2.1 REGIONAL APPROACH

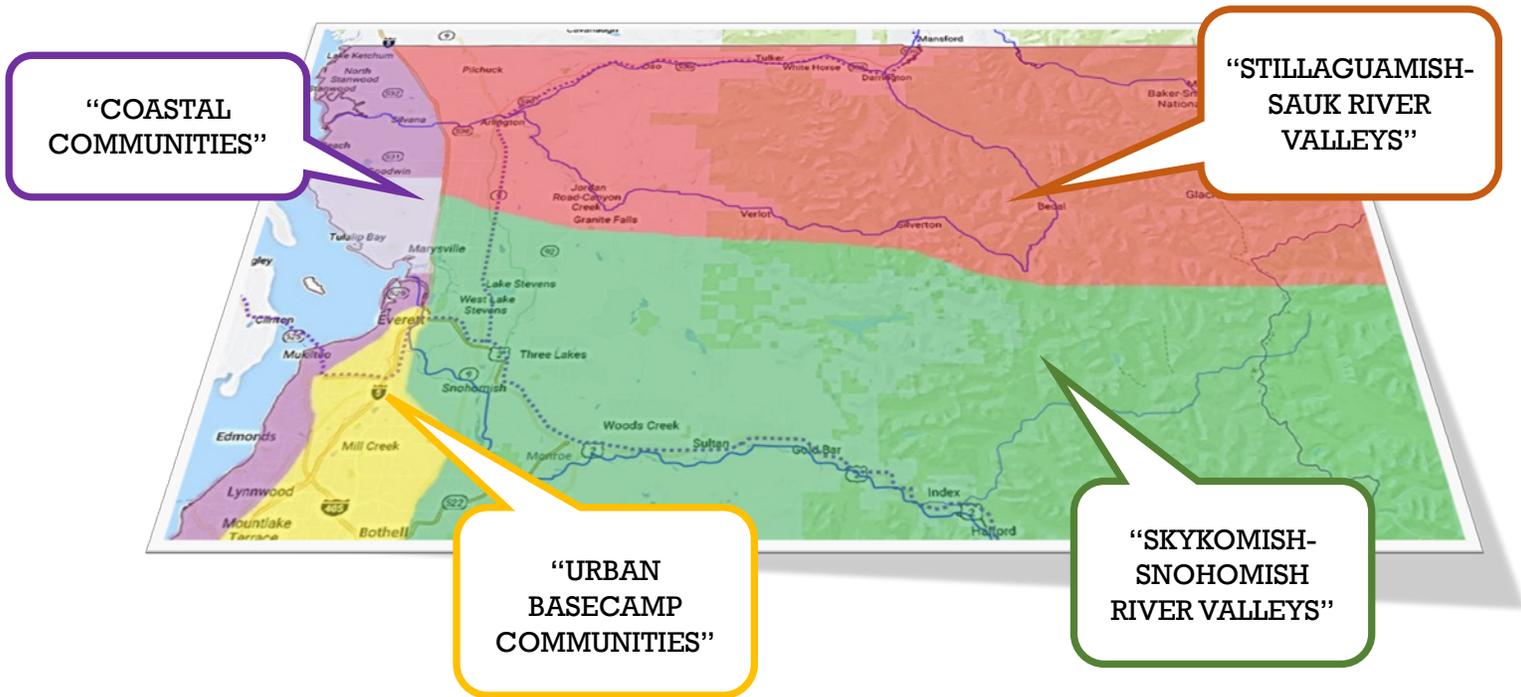
2.1.1 DEFINING THE FOUR SNOHOMISH COUNTY VISITOR REGIONS

In late 2017, regional focus group workshops were convened throughout Snohomish County and participants were asked to identify what they believed are the most natural regional boundaries in the county, from a tourism development and visitor perspective. This map defines the four primary 'regions of collaboration' viewed as the logical building blocks for regional destination development and marketing from both an industry and visitor perspective.

These four regions formed the geographic basis for the Think-Tanks that took place in June 2018. The names for each region are the recommended working names, and have been developed through extensive stakeholder discussions throughout 2017 and 2018.

A regional approach to tourism development in Snohomish County supports greater connectivity and collaboration among the county's four regions

Snohomish County Experiential Visitor Regions



NOTE: Urban Basecamp Communities name is provisional.

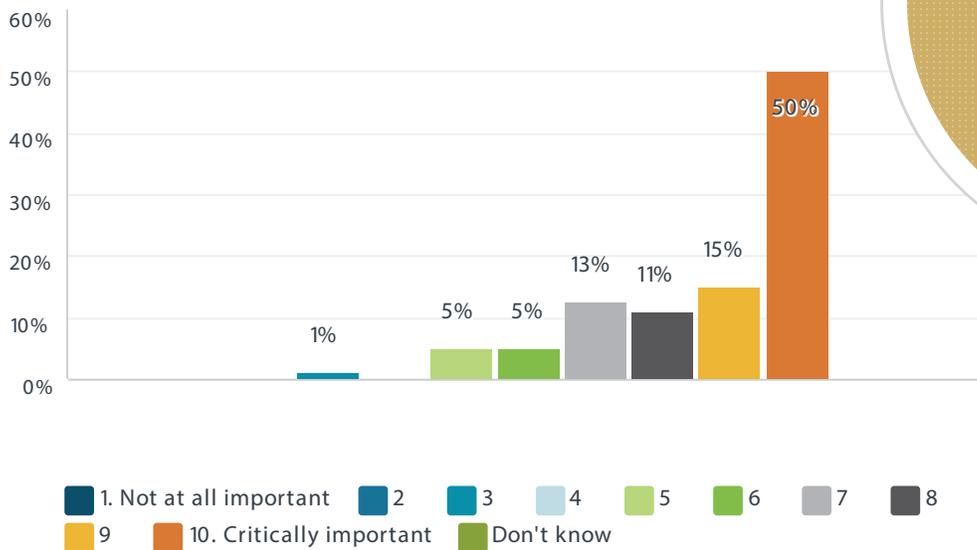
“Planning is important, transportation is important, and we need to think regionally.”

– Think-Tank Participant

2.1.2 IMPORTANCE OF A REGIONAL APPROACH

To gauge how important industry stakeholders considered taking a regional approach is to tourism development in Snohomish County, participants at the 2017 focus group sessions were asked to rank its importance. A regional approach is clearly supported.

How important do you think the REGIONAL APPROACH is to successfully move the Tourism Industry forward in Snohomish County? (n=80)



A regional approach to tourism provides the support communities need for coordinated development

Source: 2017 Snohomish County Focus Group Survey



DATA INSIGHTS:

- Industry stakeholders consider a regional approach as critical to tourism development in Snohomish County.
- With a high level of industry support for a regional approach to tourism development, Snohomish County is well positioned to lead these efforts.

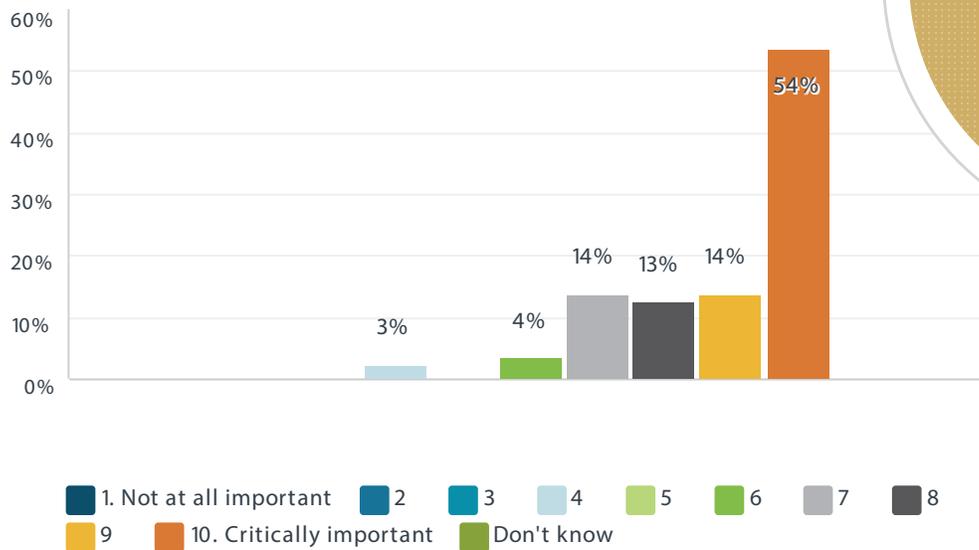
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2.2 COLLABORATION AND CONNECTIVITY

Throughout the engagement process, industry stakeholders consistently indicated that taking a regional approach to tourism development requires collaboration and connectivity among industry stakeholders. The Think-Tanks were the first steps in building a collaborative process for Snohomish County.

How important do you think it is to CONNECT the tourism industry across the different regions and locations in Snohomish County? (n=80)



The SCPRT and the SCTB play a critical role in bringing tourism industry leaders together in Snohomish County

Source: 2017 Snohomish County Focus Group Survey

“Collaboration is incredibly important to this effort, there is a strong desire across the region to increase communication between our communities, a lot of great programs already exist but not everyone is aware they exist.”

– Think-Tank participant (Feedback Survey)



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DATA INSIGHTS:

- The necessity for collaboration and connectivity throughout the County is considered critically important by participating industry stakeholders.
- Connecting the regions through infrastructure upgrades will be very important in the development of sustainable tourism in the County.

2.3 SUSTAINABILITY FOCUS

The Snohomish County Parks, Recreation, Tourism Department (SCPRT) and the Snohomish County Tourism Bureau (SCTB) are leading the implementation of the 2018-2022 Snohomish County Strategic Tourism Plan (STP). The STP directs the planning and actions for “Sustainable Destination Development” in Snohomish County.

Principals adopted by stakeholders define Sustainable Tourism in Snohomish County as,

- **Integrated with our local communities in a way that is respectful of our diverse heritage and culture;**
- **Providing visitors with authentic, place-based, educational experiences that leave them feeling enriched and inspired;**
- **Creating lasting financial and social benefits for local residents, businesses, and communities across our County;**
- **Is supported by public policies with organizational support and funding; and,**
- **Maintains, or contributes to, the health and vibrancy of our natural environment**

Maintaining a sustainability focus for tourism development in Snohomish County is the defining element of the County's Strategic Tourism Plan, and highly supported by industry leaders

Relevant to Snohomish County, at a recent forum in October 2018 on Overtourism hosted by the George Washington University Institute of Tourism Studies, the following takeaways were highlighted supporting sustainable tourism:

- **Recognize the tipping point:** More isn't always better. Determine maximum capacity for your destination and monitor social media to determine whether it's on traveler hot lists.
- **Plan ahead:** Make tourism part of comprehensive urban, regional and destination plans.
- **Stay flexible and adaptable:** What works for historic sites doesn't necessarily work for beach communities, for example. Needs differ and change over time.
- **Rethink good governance and management:** DMOs have a vital role to play beyond marketing; they need to participate in the sustainable management of destinations.
- **Redirect visitors:** Encourage visitors to travel smarter, to seek out hidden gems and to contribute to the protection of the places they visit.

“As our population grows, sustainable tourism along with a positive overall experience for our visitors will become important to keep our communities vibrant.”

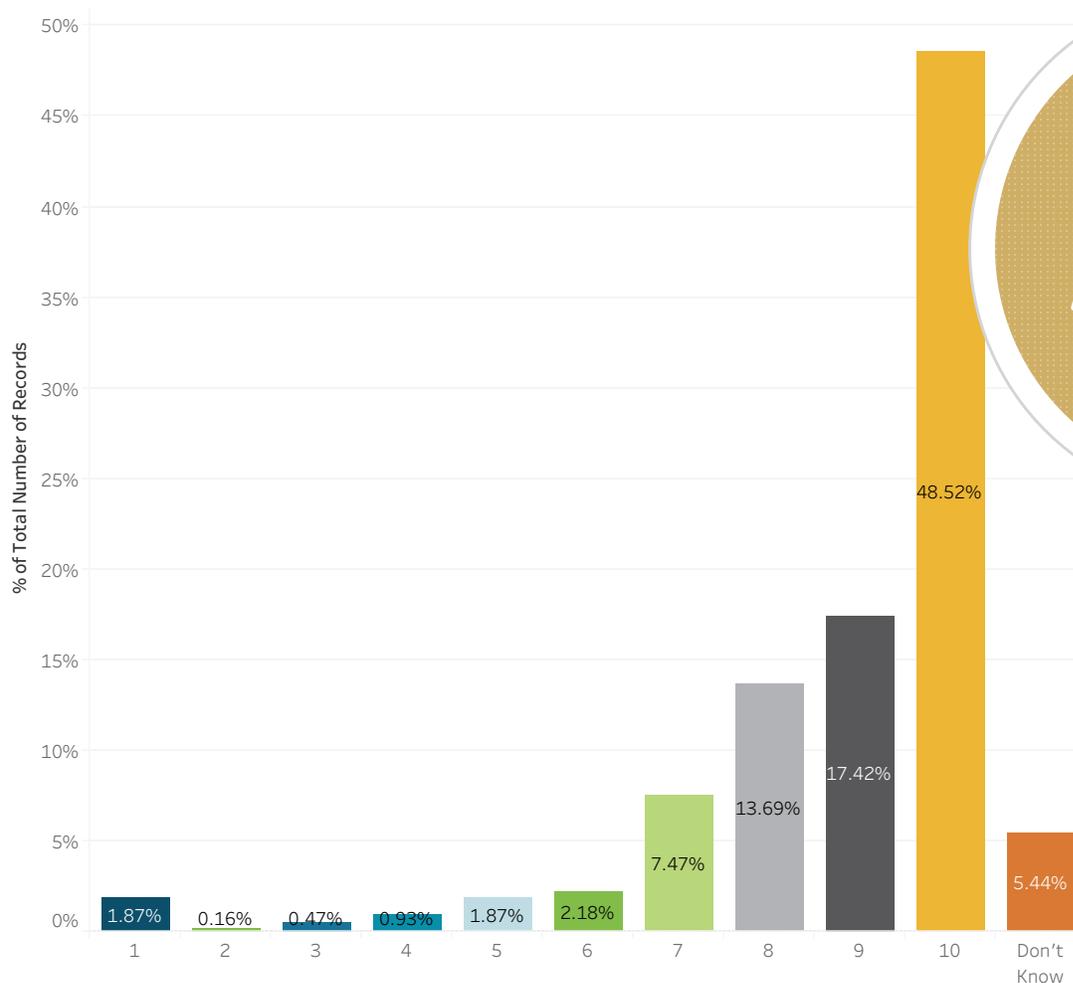
– 2018 Pre-Think-Tank Survey Respondent



2.3.1 IMPORTANCE OF SUSTAINABLE TOURISM

Before the Think-Tank workshops, participants were surveyed to ascertain where industry leaders thought Snohomish County was situated in its tourism development. Participants were first asked about the importance of each of the dimensions of sustainable tourism relative to Snohomish County.

How important do you think the five dimensions of Sustainable Tourism are for Snohomish County? (n=129) Scale: 1 = Not important; 10 = Critically important



Source: 2018 Snohomish County Think-Tank Survey



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DATA INSIGHTS:

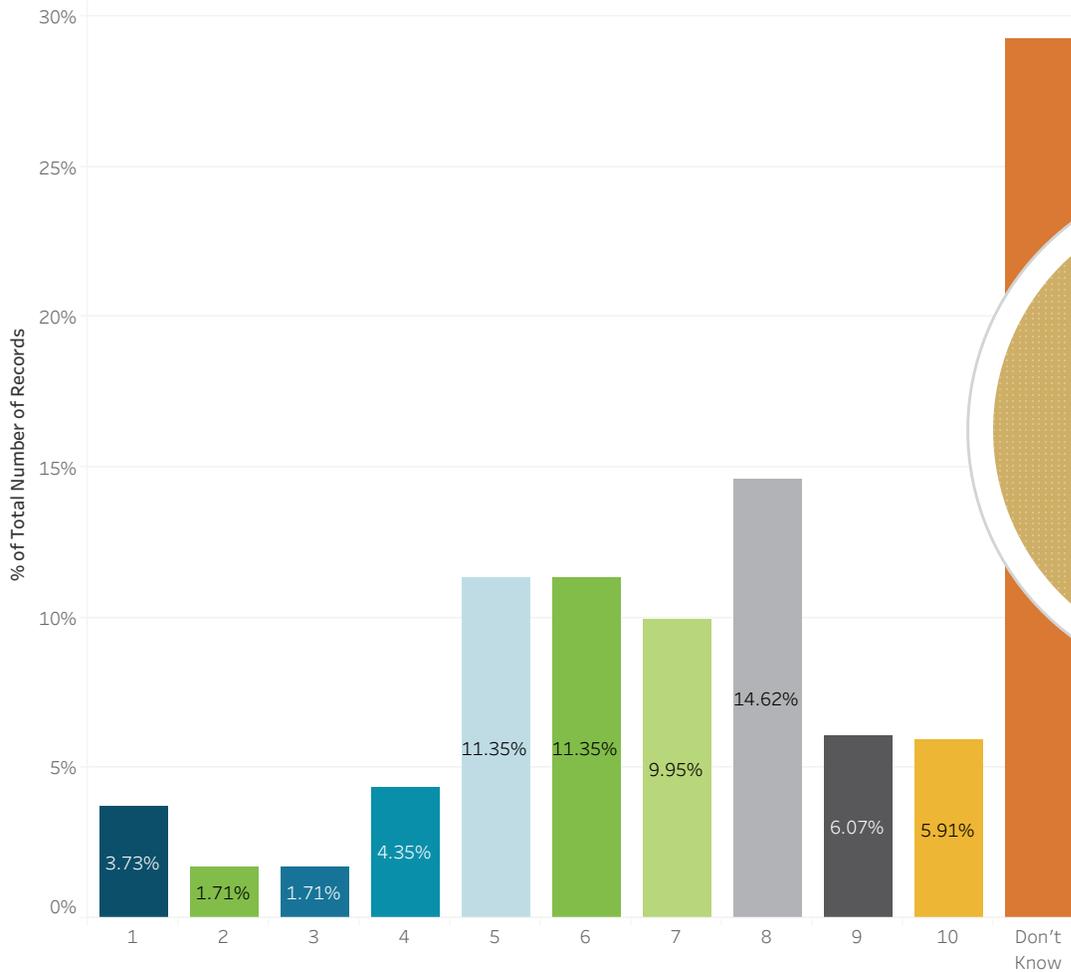
- Tourism industry leaders are unified on the importance of sustainable tourism development in Snohomish County with almost 50% rating it as critically important for the future.
- The strong support for sustainable tourism development by industry leaders gives Snohomish County the responsibility to pursue this direction.



2.3.2 CURRENT PERFORMANCE ON SUSTAINABLE TOURISM

Participants were also asked how well the County was currently performing in agreed upon dimensions of sustainable tourism. Significantly, approximately a third of all respondents did not know how well the County was performing.

How well do you think the Snohomish County Tourism industry is CURRENTLY performing regarding Sustainable Tourism? (n=129) Scale: 1 = Poorly; 10 = Very well



Clear and consistent communication about County progress on sustainable tourism development will educate industry leaders on progress in this area

Source: 2018 Snohomish County Think-Tank Survey



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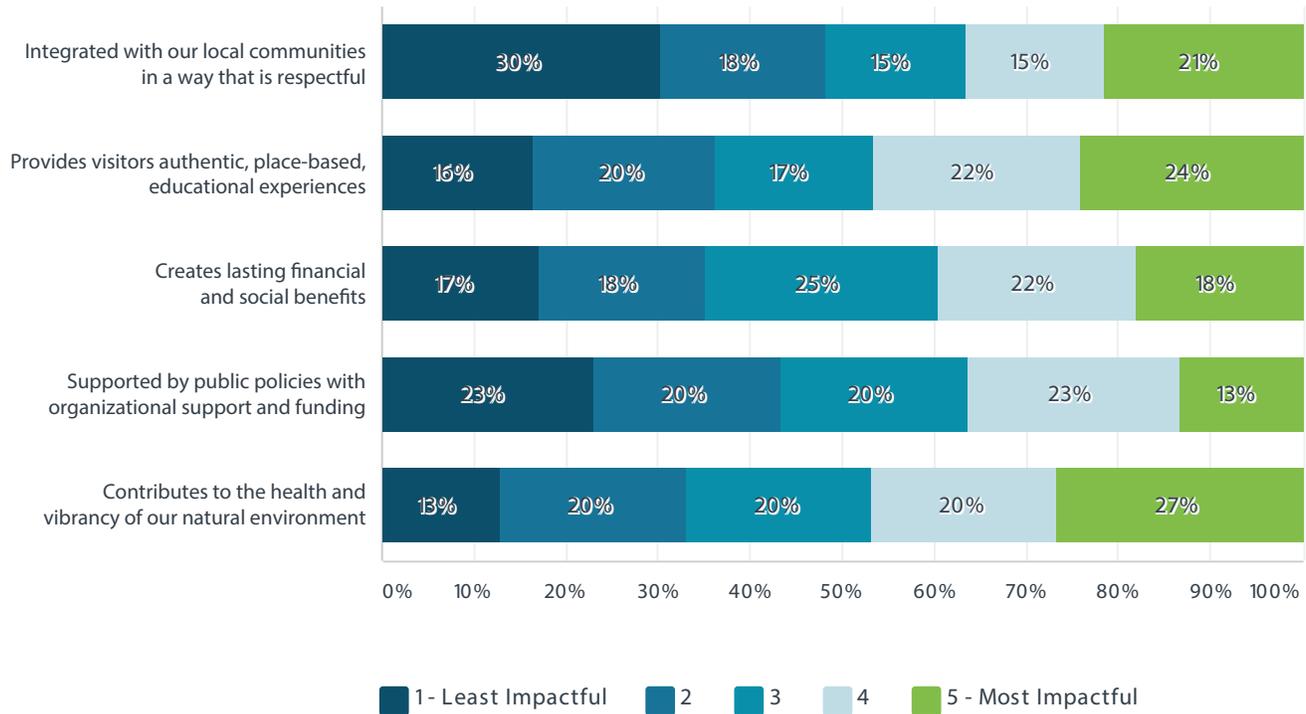
DATA INSIGHTS:

- That Snohomish County stakeholders are unclear as to how well the County is doing on sustainable tourism was demonstrated by nearly 30% people unable to answer the question.
- Given the fairly muted response as to how well the County is doing on sustainable tourism development indicates a need for more communication between the County and its constituents.

2.3.3 MOST IMPACTFUL DIMENSIONS OF SUSTAINABLE TOURISM DEVELOPMENT

All regional Think-Tank participants were asked what they thought were the most impactful dimensions in Snohomish County sustainable tourism development. Results indicate that all five dimensions were viewed as largely impactful.

Please rank the following dimensions in terms of which ones will be most impactful in developing a sustainable tourism industry in the County. (n=127) (Scale: 1 = least impactful; 5 = most impactful)



Source: 2018 Snohomish County Pre-Think-Tank Survey



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DATA INSIGHTS:

- Almost a third of survey respondents did not consider the integration of sustainable tourism with local communities in a respectful way as impactful as other dimensions.
- To ensure the long-term sustainability of tourism, regional leadership will need to be aware of the management of natural and cultural assets, and the potential for damage from overuse in popular areas.

Careful destination management builds resiliency and long-term sustainability into tourism development



3.0 THINK-TANK PROCESS AND OUTCOMES

Four Snohomish County Think-Tank workshops were conducted to help regional stakeholders plan for the implementation of the 2018-2022 Strategic Tourism Plan (STP). The scenario-based Think-Tank workshops included stakeholders from Snohomish County, and regional stakeholders specific to each region. Approximately 40-60 people attended each all-day Think-Tank in June 2018.

Future iQ's Scenario Planning process provides a method to explore plausible futures and consider the implications of various future scenarios. The Think-Tank workshop aimed to:

- Deepen the understanding and examination of how external events and local conditions could shape decision-making
- Identify and understand the key influences, trends, and dynamics that will shape each Snohomish County Visitor Region over the next 10 to 15 years
- Create and describe four plausible long-term scenarios for each region
- Explore alignment around a shared and preferred future vision for the regions
- Begin initial strategy and action planning

The scenarios developed during this Scenario Planning process and outlined in this report are important to provide a framework to discuss future possible outcomes and implications for tourism development. In addition, the Think-Tank deliberations assisted with identifying potential actions for each region, and in exploring how various groups might best contribute to future tourism development. The design of the Think-Tank Workshop included a presentation and discussion about key forces shaping the future, at a global and local level. These exercises and work were aimed to build a robust basis for the scenario formulation.

The participants were then guided through a Scenario Planning process to develop four plausible scenarios for the future of each Snohomish County Visitor Region. The process involved exploration and discussion of global, regional, and local trends and forces of change; development of a scenario matrix defining four plausible scenario spaces for the future; and, the development of descriptive narratives of each scenario. The event concluded with discussion of the scenarios, selection of a preferred scenario and first steps to determine possible strategic actions to create the preferred scenario for each region.

The scenario planning process allowed stakeholders in each region to examine the implications of choices about future direction



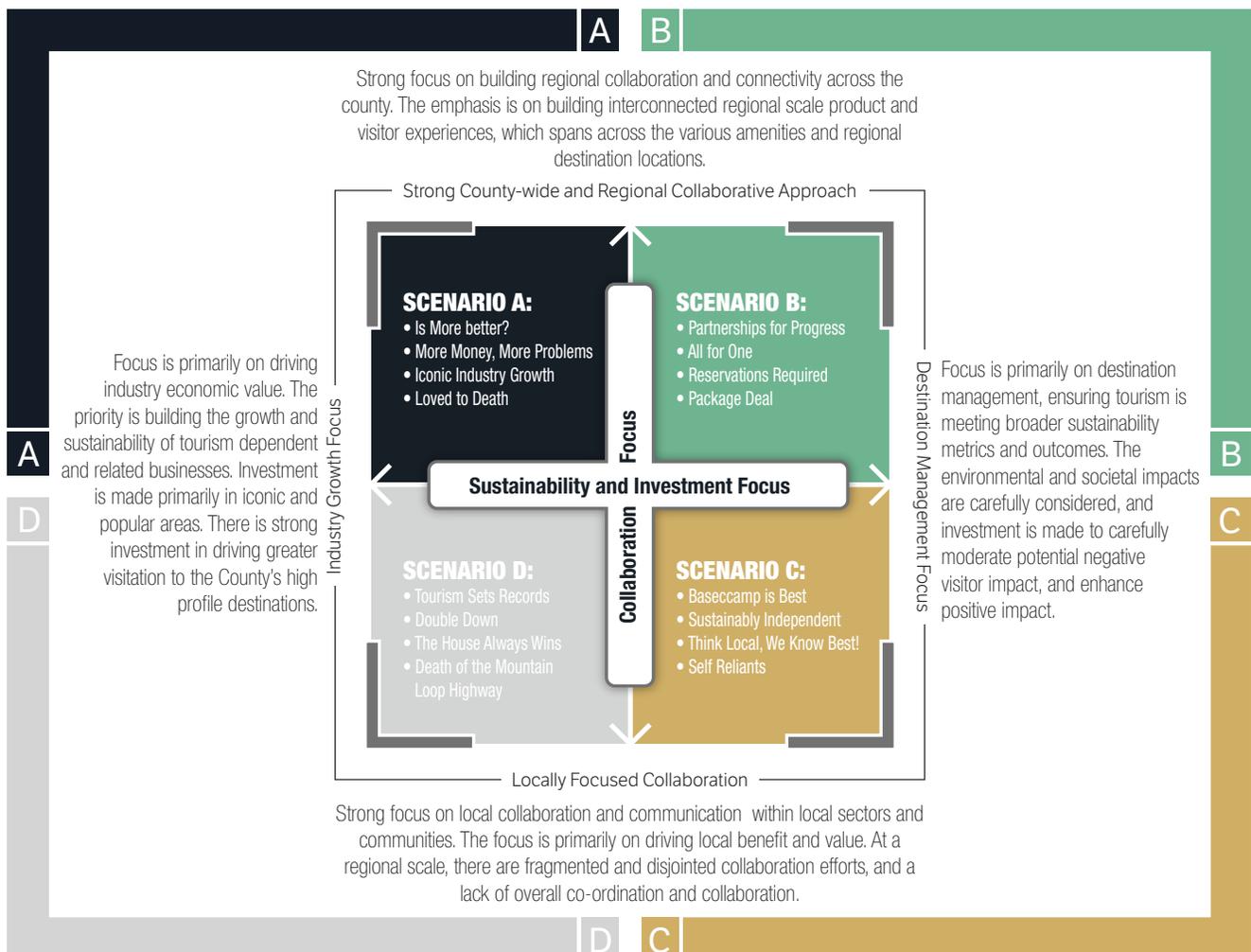
3.1 CREATING THE HYPOTHETICAL SCENARIO FRAMEWORK

Based on the Pre-Think-Tank survey responses and key input from the SCPRT and SCTB leadership team, themes were identified to become the basis for two axes on the scenario matrix. The two axes identified were **Sustainability and Investment Focus** and **Collaboration Focus**. Think-Tank participants were presented with the scenario matrix, defined by the two major axes of ‘Sustainability and Investment Focus’ and ‘Collaboration Focus’ (see diagram). Brief descriptions were also attached to the end points of each driver axes. Participants were divided into four groups to develop a narrative for each scenario. Each group was asked to describe the characteristics of their Visitor Region in 2030 based on global and local trends under the conditions of the scenario quadrant that they had been given:

- Visitor Profile and Experience
- Destinations and Communities
- Tourism Industry Profile

After the characteristics were established, Think-Tank participants were asked to devise major events or headlines of how the scenario occurred using the years 2020, 2025, and 2030, and to give their scenario a descriptive name. Narratives and descriptions of each scenario as developed by workshop participants are included in individualized regional Think-Tank reports. Below is the matrix containing all scenario names created in the Think-Tanks.

Combined Regional Think-Tank Scenario Matrix



3.2 REGIONAL SCENARIO COMMONALITIES AND DIFFERENCES

The plausible scenario descriptions created in each of the regions were remarkably similar, with the differences described as predominantly specific to each region. The tone of each scenario description also was similar, lending itself to a sense of unity in outlook for the future.

SCENARIO COMMONALITIES	REGIONAL SCENARIO DIFFERENCES
<p>Scenario A:</p> <ul style="list-style-type: none"> • Visitation rates increase rapidly in iconic destination areas • Uncontrolled growth increases congestion and traffic on roads • Emergence of 'have and have-not' communities • Authentic experiences are reduced 	<p>Scenario A:</p> <ul style="list-style-type: none"> • Iconic area visitation differs based on region • Goal to get more heads in beds in urban areas not the same in rural areas
<p>Scenario B:</p> <ul style="list-style-type: none"> • Destination management promotes regional collaboration and connectivity • Environmental stewardship important • Organized tours steer visitation • Infrastructure is upgraded and transportation is varied 	<p>Scenario B:</p> <ul style="list-style-type: none"> • Marketing strategies will differ depending on the type of personae attracted to each region • Packages focus on urban or rural, depending on the region
<p>Scenario C:</p> <ul style="list-style-type: none"> • Lack of coordination and collaboration creates disjointed competing local events • Local charms and attractions are emphasized • Overcrowding and parking issues • Regions are subject to seasonal swings 	<p>Scenario C:</p> <ul style="list-style-type: none"> • Hyper local emphasis creates natural differences in marketing strategies • Paine field is a point of difference for the Urban Basecamp community and other regions
<p>Scenario D:</p> <ul style="list-style-type: none"> • Quantity over quality is emphasized • Significant competition among regions for visitors • Rapid population growth brings infrastructure decay • Rural areas overrun, and locals are priced out of housing markets 	<p>Scenario D:</p> <ul style="list-style-type: none"> • Some difference on where economic development becomes over-development and where it can help some communities • More restaurant growth in urban areas than rural areas

Although each Think-Tank region hosted its own workshop, the similarities in understanding and perspective on sustainable tourism development indicate the desire for a common direction for Snohomish County

3.3 EXPECTED AND PREFERRED FUTURES

3.3.1 EXPECTED FUTURE: SCENARIO D

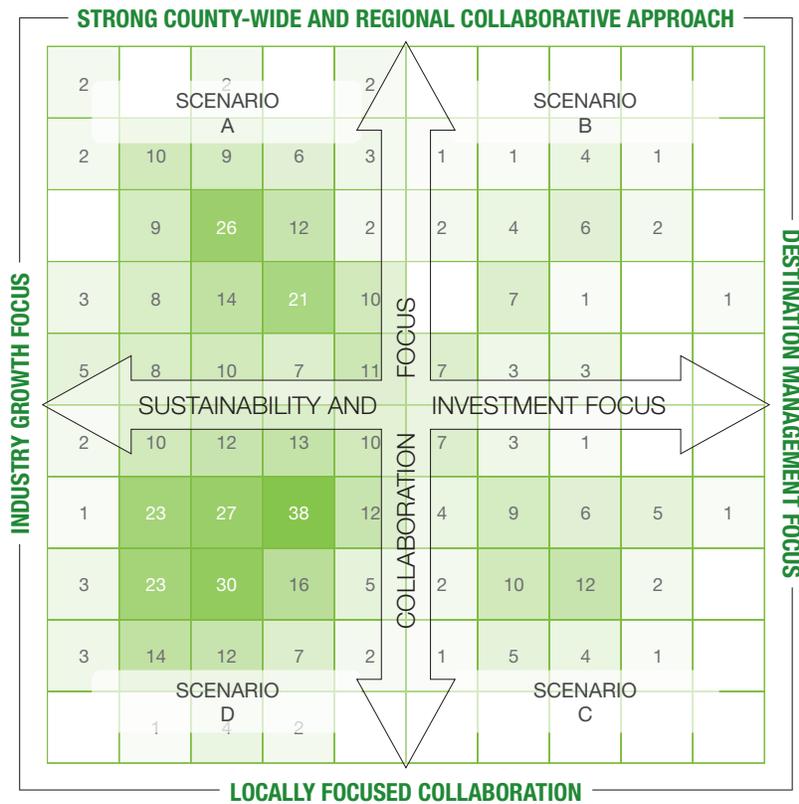
The 'Expected Future' is the one deemed most likely to happen if collaborative destination management is not pursued by Snohomish County. The majority of workshop participants in all regions indicated that Scenario D is the scenario that could be expected if a destination management framework was not pursued. Participants from one region, Skykomish-Snohomish River Valley, saw the possibility of the expected future pulling up into Scenario A if more county-wide collaboration takes place.

Below is the aggregated data from the heat maps taken from all four regional Think-Tanks.

Snohomish County stakeholders were aligned around the common view of the expected future if no actions are taken towards collective destination management and sustainable tourism development

SNOHOMISH COUNTY COMBINED REGIONAL THINK-TANK RESULTS

EXPECTED FUTURE – 2030



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DATA INSIGHTS:

- With slightly different regional perspectives on the expected future, Snohomish County will need to work with stakeholders and communicate the pathway to the preferred future widely and clearly.
- Non-action risks placing County tourism in an unsustainable position.

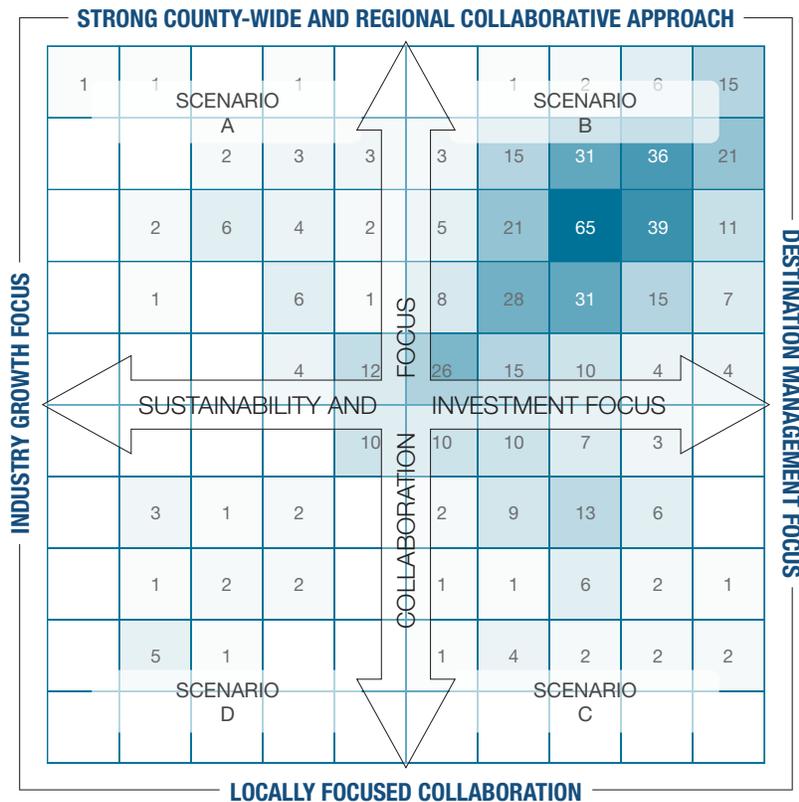
3.3.2 PREFERRED FUTURE: SCENARIO B

While each of the scenarios were viewed as plausible, Think-Tank participants in all four regions expressed a preference for one of the presented outcomes, Scenario B. This scenario is one where collaborative destination development is pursued. This was described differently in each of the Think-Tank workshops, but the common themes included a focus on environmental stewardship and investment in products and infrastructure that help the sustainable tourism outcomes.

Below is the aggregated data from the heat maps taken from all four regional Think-Tanks.

SNOHOMISH COUNTY COMBINED REGIONAL THINK-TANK RESULTS

PREFERRED FUTURE – 2030



The definite preference for Scenario B for the future by all four regions gives Snohomish County clarity for actions needed



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DATA INSIGHTS:

- The tight concentration of color in Scenario B for all visitor regions indicates a close alignment of thinking among industry leaders.
- Snohomish County will need to be proactive in its leadership to move the regions in a unified progression towards the preferred future.

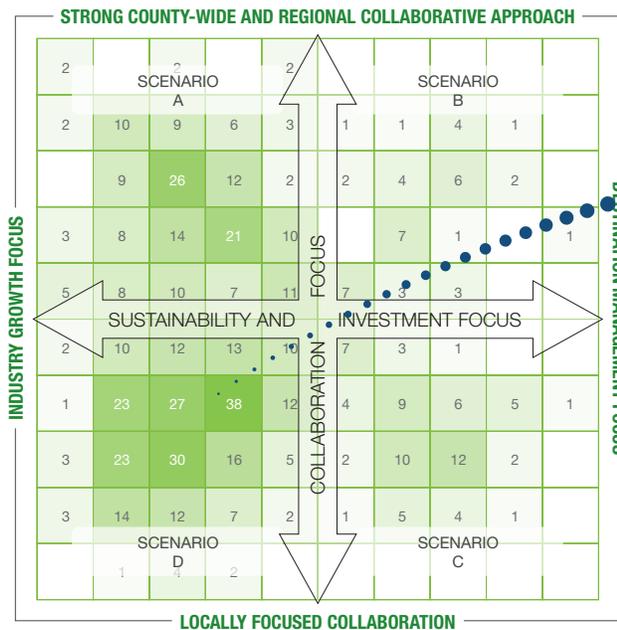


3.3.3 CLOSING THE GAP – GETTING TO THE PREFERRED FUTURE

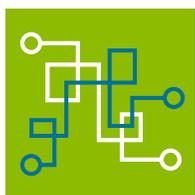
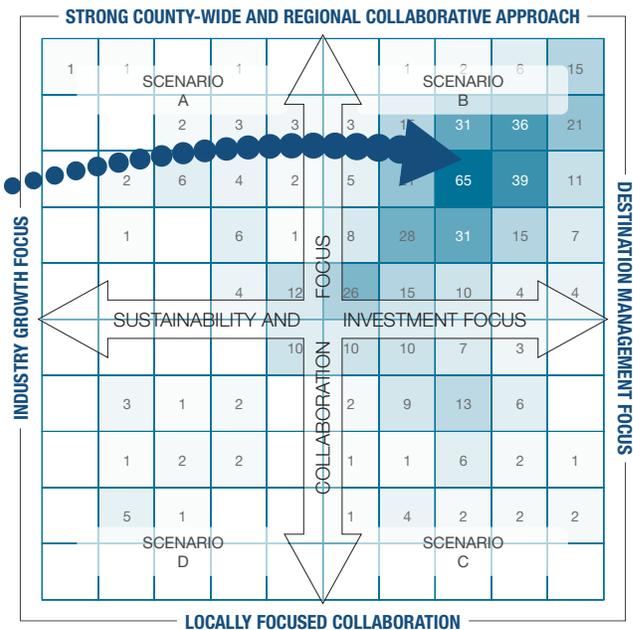
At their respective workshops, participants from the four Snohomish County regional Think-Tanks discussed the ramifications and implications of failing to achieve the preferred future. The high level of concentration around the preferred view indicates a strong alignment among participants in all four regions that Scenario B represented the preferred future scenario for the County. This view encapsulates the desire for the tourism industry to pivot to a trajectory of destination development and sustainability, as described in the Thank-Tank workshop reports.

Getting from the expected to the preferred future requires strategy, focus and commitment by all tourism industry participants

**SNOHOMISH COUNTY
COMBINED REGIONAL THINK-TANK RESULTS**
EXPECTED FUTURE – 2030



**SNOHOMISH COUNTY
COMBINED REGIONAL THINK-TANK RESULTS**
PREFERRED FUTURE – 2030



IDEAS TO CONSIDER:

- Aligning the trajectory of tourism development in the County will require a collective balance between growth, quality of life and environmental stewardship undertaken by interests in all regions.
- Getting to the preferred future, Scenario B, means taking a hard look at how all four Snohomish County visitor regions can collaborate to achieve the common trajectory.

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“I really like what is going on currently – the melding of Tourism with Parks and Recreation; the sharing of information between the various entities, agencies through the Roundtables, Tourism Workshops, etc. I also like the updated Snohomish County Strategic Plan. The aforementioned will need time over the next 10 years to incubate and evolve. Keep up the great work!!”

– Think-Tank participant

3.3.4 BRAINSTORMING REGIONAL ACTION IDEAS

With the Preferred Future scenario of Scenario B as a goal, Think-Tank participants in all four regions were asked collectively to think about strategic actions they could pursue to take their region to the preferred future. Participants were asked to break into table groups to discuss and create action items that regional groups could take to propel the tourism industry towards the preferred future. Each table group brainstormed at least three action items, then presented and categorized the action items as they related to the strategies of the Snohomish County 2018-2022 Strategic Tourism Plan (STP). Not all STP strategies were assigned an idea.

Building on these ideas for action, large group discussions further grouped the ideas into potential building blocks for regional projects that could be pursued to achieve Scenario B. Think-Tank participants were asked to outline each project hypothetically to get a sense of how it would work and how it supported the characteristics of the preferred scenario. Participants tied the projects to the characteristics of developmental themes. Several of these themes are the same among the regions. Below is a compilation of the regional projects categorized by the following themes:

- Communication and Collaboration
- Connectivity
- Economic Development
- Sustainability

Please refer to the individual regional Think-Tank reports for detailed information on each region's project descriptions.



“At this particular time, when the economy is good, and Seattle is a darling, we have the best opportunity we have had to improve our tourism for the long-term benefit of our region. If we get to be known as the place to go aside from Seattle, we will all benefit, but it must be done where we enhance what is good about this area for the benefit of all.”

– Think-Tank Survey Respondent





Collaborative destination development will involve the active participation of all regional tourism entities and stakeholders

4.0 BUILDING A SUSTAINABLE TOURISM INDUSTRY – A FUTURE PERSPECTIVE

The four regional Think-Tanks provided an open forum for industry stakeholders to debate and discuss their participation in the future of sustainable tourism development in Snohomish County, over the next ten years. Five high-level outcomes emerged by the end of this engagement period:

1. **Stakeholder support for the regional names**
2. **The necessity of creating a county-wide strategy for collaborative destination management with programming**
3. **Maintaining a sustainability focus**
4. **The importance of improving overall visitor experience**
5. **The importance of improving local residents' understanding and appreciation of the tourism industry**

The lessons learned thus far from the Snohomish County Regional Think-Tanks reveal a significant appetite for change and development within the tourism industry. The results presented in this report represent aggregated data from the four Think-Tanks that combined indicate industry-wide support for a concerted effort to collaborate and regionally connect to the rest of the County through unified programming and information-sharing.

Specific insights emerging from the stakeholder engagement process include:

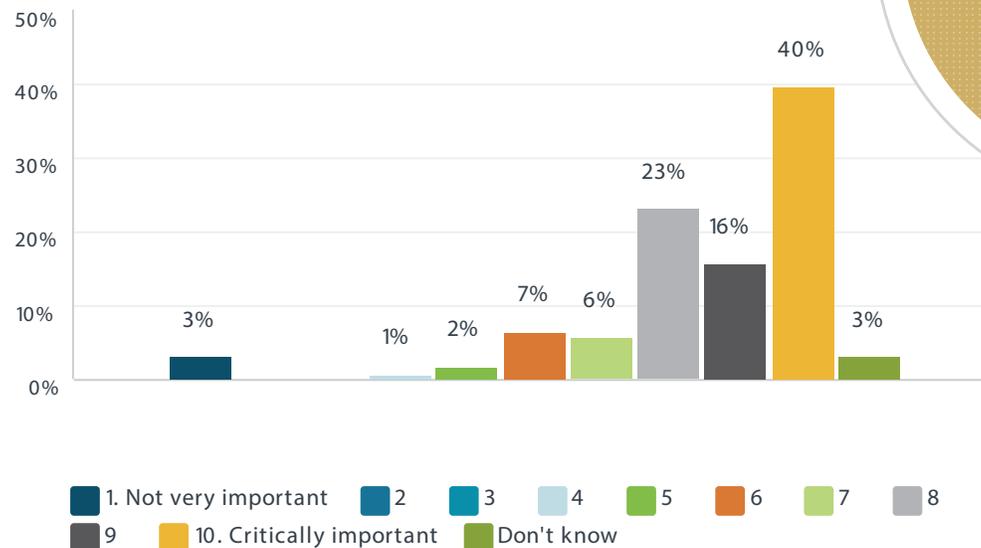
- Desire for 'Destination Management Focus' and building 'Regional collaboration' (Collaborative Destination Development)
- Appetite for pro-active tourism strategies and investment priorities as defined in STP and existing work
- Sustainability is the key underpinning philosophy and desire
- Recognition of the value of tourism and connection between urbanized and rural areas
- Preferred Future will see more resources invested in rural areas

Overall, focus will need to be on building collaborative destination development; to use the *Seattle NorthCountry*, *True PNW* brand ethos of socially and environmentally conscious visitation that inspires respect for local communities and responsible outdoor recreation. Promoting this ethos can elevate visitor awareness of local priorities for stewardship and sustainable visitor practices. This approach will connect and strengthen the county tourism ecosystem and help build greater resiliency into local economies. The new mind-set will require ongoing reallocation of funding to support tourism programming for locally-driven economic development that emphasizes community benefit and collective thinking about county-wide, long-term sustainability.

4.2.1 IMPORTANCE OF IMPROVING OVERALL VISITOR EXPERIENCE

It is generally understood that visitor experience is a critical part of tourism development. Think-Tank participants were asked how important they thought improving the overall visitor experience is to the future of Snohomish County. Industry stakeholders considered improving the overall visitor experience as critically important.

Over the next 5 years, how important do you think it is to work on improving the overall visitor experience to Snohomish County? (n=121)

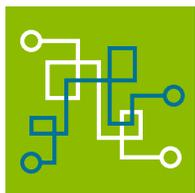


Stakeholders are aligned around the notion that creating a positive visitor experience is critical to sustainable tourism development and repeat visitation

Source: 2018 Snohomish County Pre-Think-Tank Survey

“The overall visitor experience will either validate or invalidate the work done to improve (or not) their experience. If the visitor experience is positive, then we have a platform to build upon – and keep improving and innovating and adapting – and the visitor will continue to come back and tell others of their positive and authentic experiences.”

– Think-Tank Survey Respondent



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IDEAS TO CONSIDER:

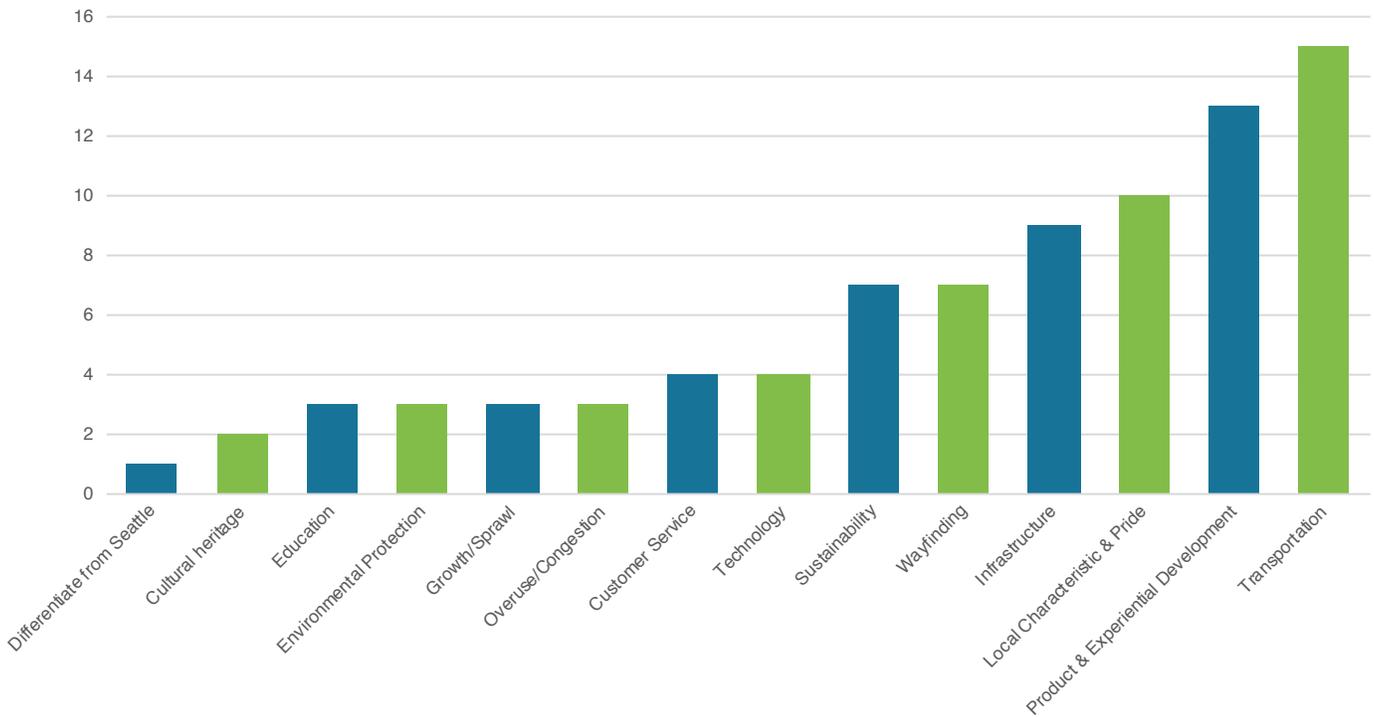
- The general trend in visitor activities is an increased focus on experiences and organized group recreation activities.
- Travelers are increasingly making decisions based on the impact of tourism on the local environment, cultures, and communities.



4.2.2 IMPORTANT FACTORS SHAPING VISITOR EXPERIENCE

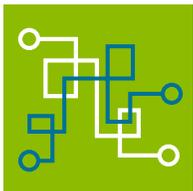
The factors shaping visitor experience in Snohomish County were also explored at the 2018 Snohomish County Tourism Summit. Industry stakeholders were asked what they considered the most important factors shaping the visitor experience in the County. Below is a compilation of their responses.

What are the most important factors that will shape the visitor experience in Snohomish County in the future? (Categorized responses)



Quote: “So important to keep regional meetings and workshops ongoing to move forward to develop a regional, sustainable tourism industry and work to lobby successfully for needed transportation infrastructure.”

– Think-Tank participant (Feedback Survey)



FutureInsight

IDEAS TO CONSIDER:

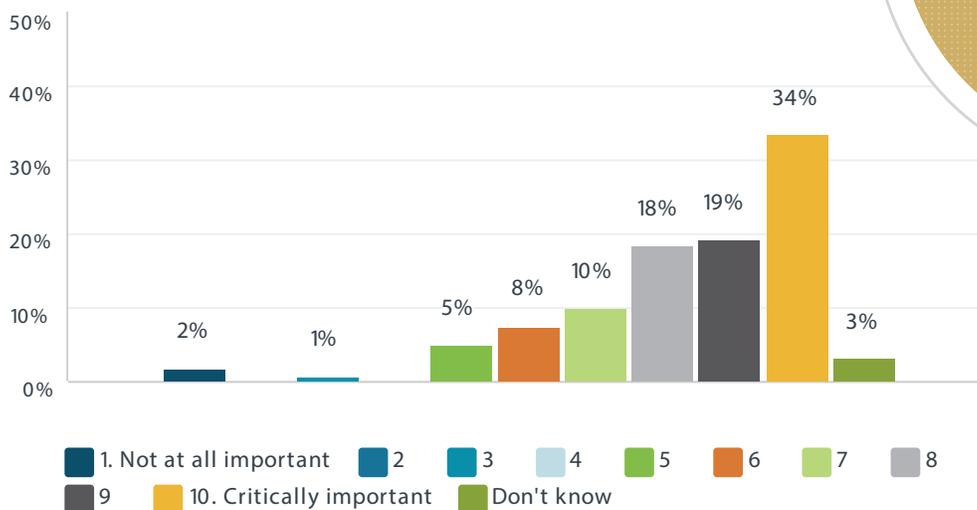
- Technology is reshaping the global tourism industry, from how people communicate, to how they travel and recreate. Importantly, technology will change how visitors are served and transported.
- With an overall trend towards authentic, experiential travelling, tourism development in Snohomish County is well positioned to accommodate changing societal values.



4.2.3 IMPORTANCE OF IMPROVING LOCAL RESIDENTS RELATIONSHIP TO TOURISM

To get a sense of how important industry leaders considered local residents' views on tourism development, participants were asked how important it would be to improve residents' understanding and appreciation over the next five years. The vast majority of stakeholders considered improving local residents' understanding and appreciation of tourism as important to the tourism industry in Snohomish County.

Over the next five years, how important do you think it is to work on improving the local residents understanding and appreciation of the tourism industry in Snohomish County? (n=119)

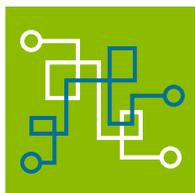


Source: 2018 Snohomish County Pre-Think-Tank Survey

A positive relationship between local residents and the tourism industry is key to successful sustainable tourism development

“Local resident understanding and appreciation of tourism in Snohomish County is the foundation upon which an authentic and positive visitor experience is launched. Local understanding and involvement with tourism also provides the local resident the ability to help determine what is in the best interest of their community now and in the future.”

– Think-Tank Survey Respondent



FutureInsight

IDEAS TO CONSIDER:

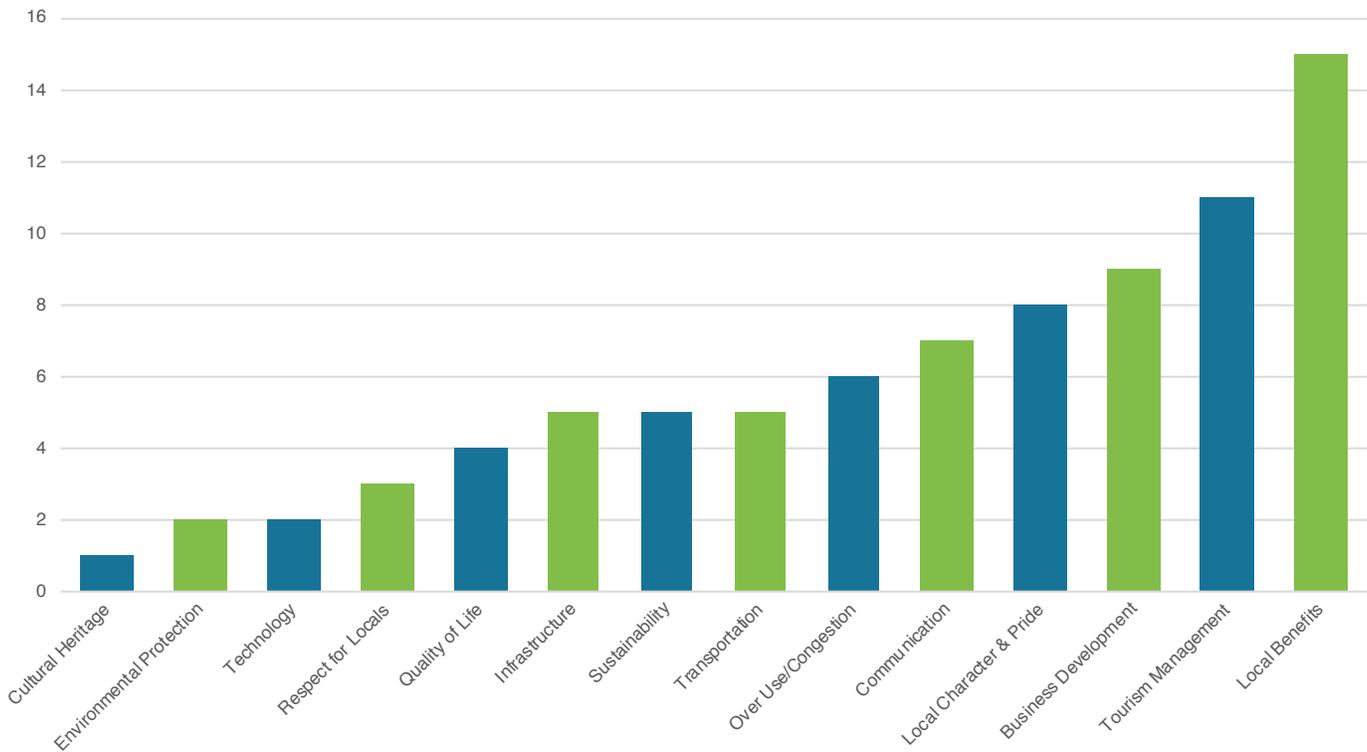
- The issue of visitor experience is pivotal for Snohomish County, particularly with its proximity to Seattle and the emergence of commercial air service at Paine Field Airport.
- 95% of industry stakeholders consider improving local residents' understanding and appreciation of the tourism industry as important to Snohomish County.



4.2.4 KEY DRIVERS SHAPING RESIDENTS' RELATIONSHIP TO THE TOURISM INDUSTRY

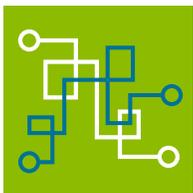
Key drivers shaping residents' relationship to the Tourism industry were also explored at the 2018 Snohomish County Tourism Summit. Industry stakeholders were asked what they considered the key drivers shaping residents' relationship to the tourism industry.

What are the key drivers that will shape the residents' relationship to the tourism industry? (Categorized responses)



“We need to work together, not against each other. Benefit from everyone.”

– 2017 Focus Group Participant



FutureInsight

IDEAS TO CONSIDER:

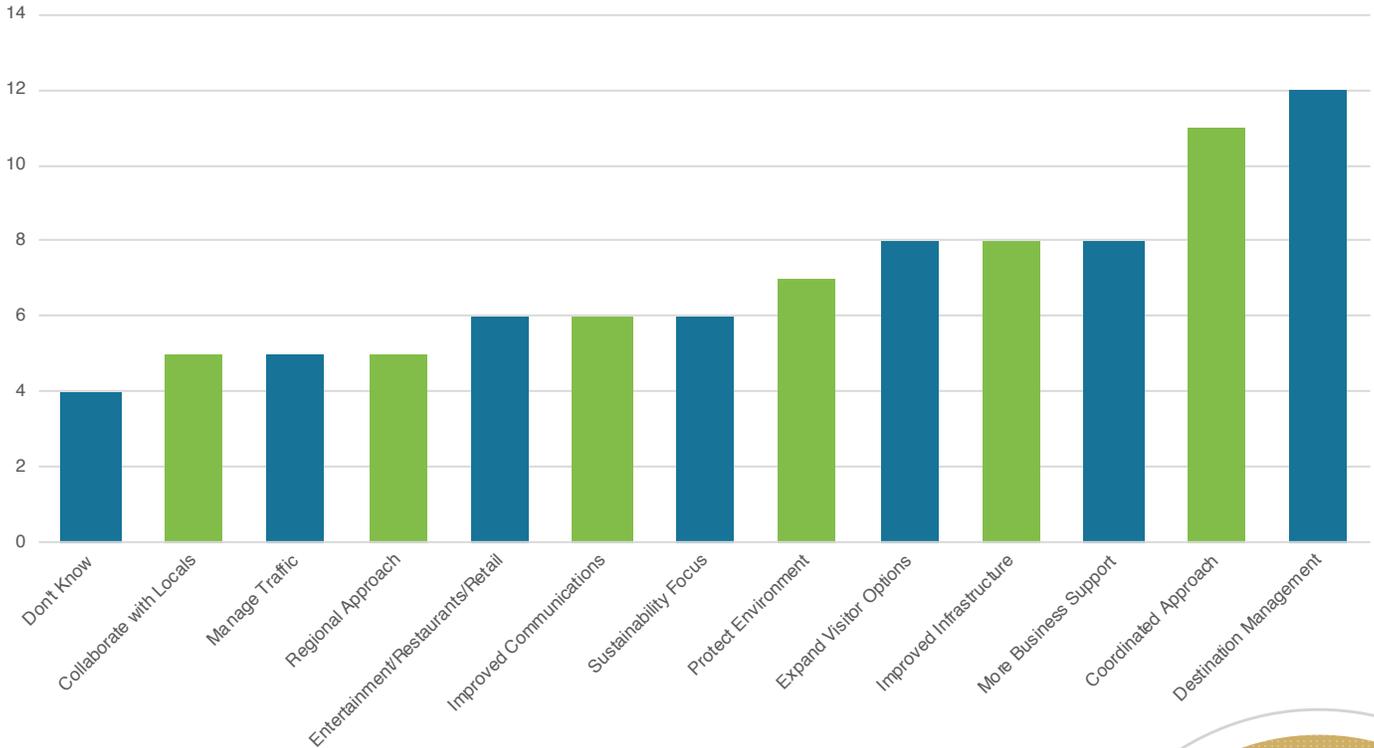
- Tourism is already a major economic driver in Snohomish County and, powered by emerging trends, has the potential to contribute significantly more to the local economy and quality of life.
- Combined with leadership and financial support, regional tourism development could leverage the tourism industry to create sustainable benefits for the County.

To avoid alienating local residents, tourism development must be managed to provide local benefits that are long-term and sustainable

4.2.5 ANTICIPATED SNOHOMISH COUNTY TOURISM 10-YEAR EVOLUTION

To get a sense of how industry stakeholders anticipate the Snohomish County tourism industry, Think-Tank participants were asked how they would like to see the industry evolve over the next 10 years.

**How would you like to see the Snohomish County Tourism industry evolve over the next 10 years?
(n=79) (Categorized responses)**

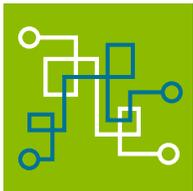


Source: 2018 Snohomish County Pre-Think-Tank Survey

“I feel that this idea of a regional approach to sustainable tourism is right ‘on track’. The tourism industry needs to continue to grow in this direction.”

– Think-Tank Survey Respondent

In making the necessary shifts, Snohomish County has a tremendous opportunity to lead its sustainable tourism development towards its preferred future over the next 10 years



FutureInsight

IDEAS TO CONSIDER:

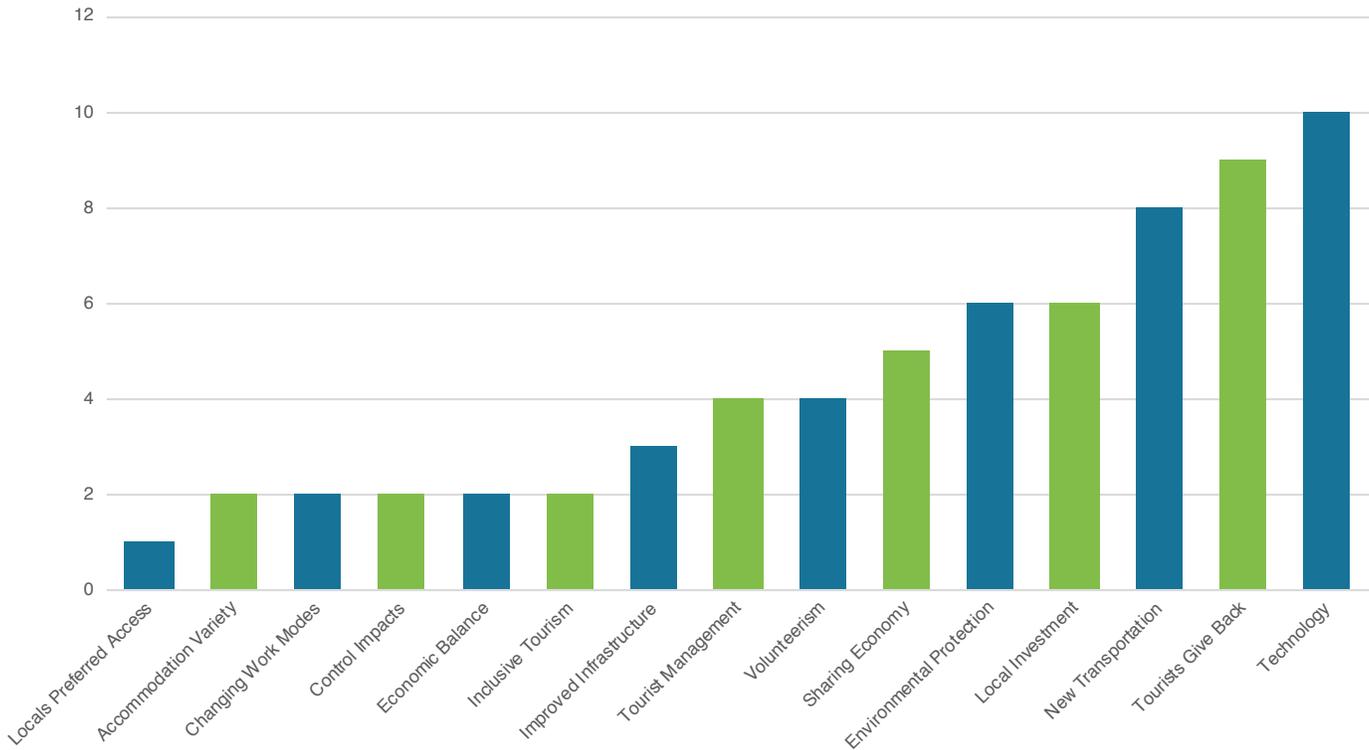
- Demographic and societal shifts in the future means that the local tourism industry will need to support development of infrastructure, products, programming, and services that resonate with more diverse groups.
- Situated in close proximity to large urban markets such as Seattle and Vancouver, the Seattle NorthCounty, True PNW ethos can advocate for respect, local benefit, and responsible outdoor recreation as defining characteristics of the destination.

4.2.6 NEW CHARACTERISTICS DEFINING SUSTAINABLE TOURISM

Participants at the 2018 Snohomish County Tourism Summit were also asked what they thought would be the new characteristics that may define the general topic of Sustainable Tourism as society evolves over the next 10 years.

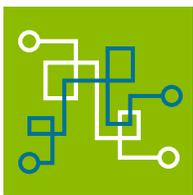
As society evolves, what new characteristics might define Sustainable Tourism in 10 years?

(Categorized responses)



“No one entity can do it all effectively. The visitor and regions ultimately benefit from a combined effort.”

– 2017 Focus Group Participant



FutureInsight

IDEAS TO CONSIDER:

- Technology and its impact in many forms is seen as the number one characteristic that will define sustainable tourism in the next 10 years.
- Many aspects of sustainable tourism are inherent to the character and values of Snohomish County, as shown by the defining characteristics named by industry stakeholders.



Increasingly, visitors are making travel decisions based on multiple factors, including environmental, social and economic considerations related to sustainable tourism



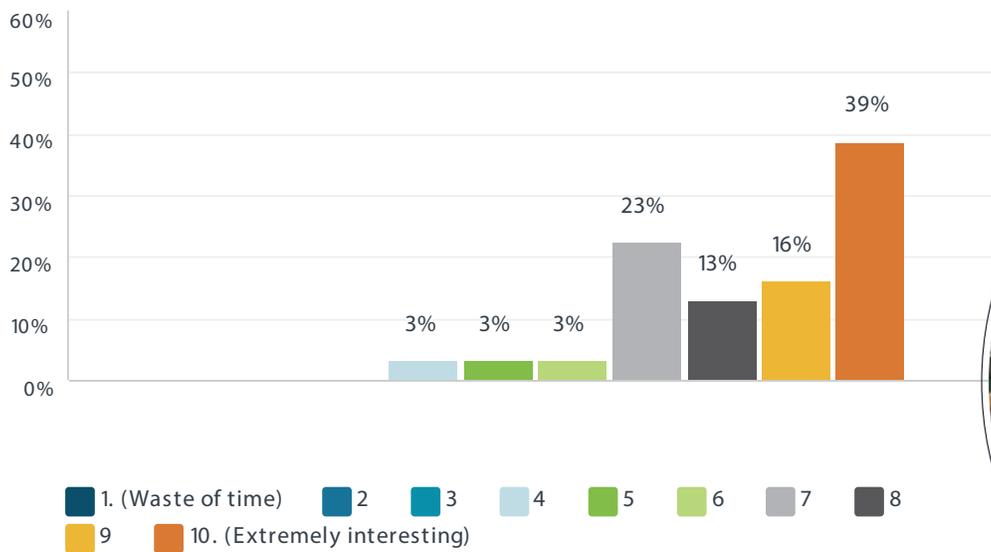
"Amazing experience! I can't wait to see where it goes from here!"

- Think-Tank participant

5.0 PERCEIVED VALUE OF THE SCENARIO PLANNING PROCESS

Think-Tank participants were asked about how interesting and valuable they considered the scenario-based future planning process. The majority of respondents considered the process valuable and interesting.

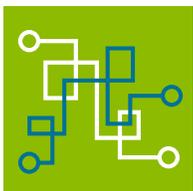
How interesting and valuable did you find this scenario planning process?



Source: Snohomish County Regional Tourism Future Think-Tank Feedback Survey

"Well done. It's great to have all these individuals and stakeholders in the room talking about the future in Snohomish County."

- Think-Tank participant



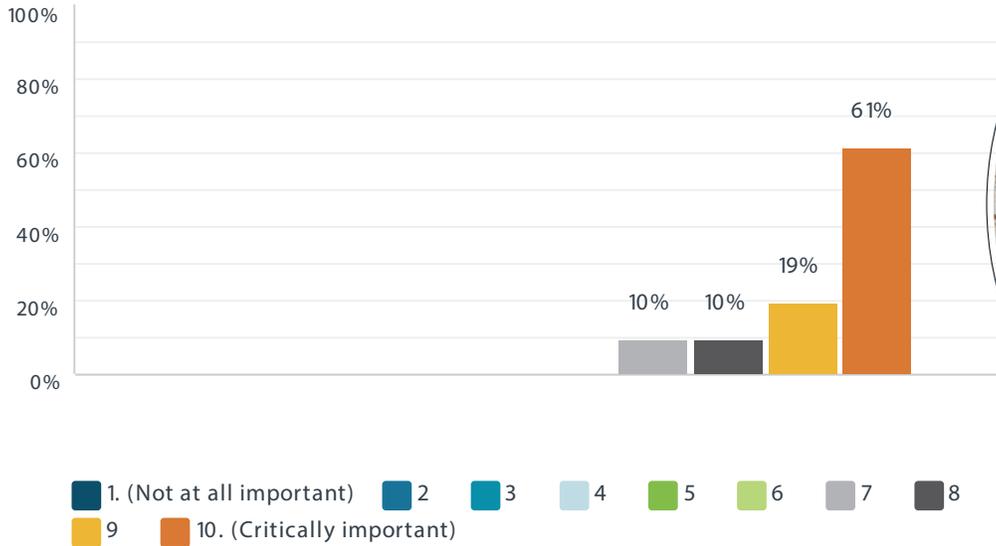
IDEAS TO CONSIDER:

- The vast majority of Think-Tank participants considered the scenario planning process interesting and valuable.
- Scenario planning is a methodology that allows participants the opportunity to openly discuss and consider plausible futures and to actively choose a preferred direction for the future.

5.1 IMPORTANCE OF TOURISM DEVELOPMENT PLANNING

Think-Tank participants were also asked about the importance of tourism development planning for Snohomish County. The majority of respondents considered the process critically important.

How important do you think it is to be undertaking tourism development planning for Snohomish County?



Source: Snohomish County Regional Tourism Future Think-Tank Feedback Survey

“Please keep leading this initiative. If the County stops, it dies. This will help to prioritize needed improvements for our residents, businesses and visitors.”

– Think-Tank participant (Feedback survey)



DataInsight

IDEAS TO CONSIDER:

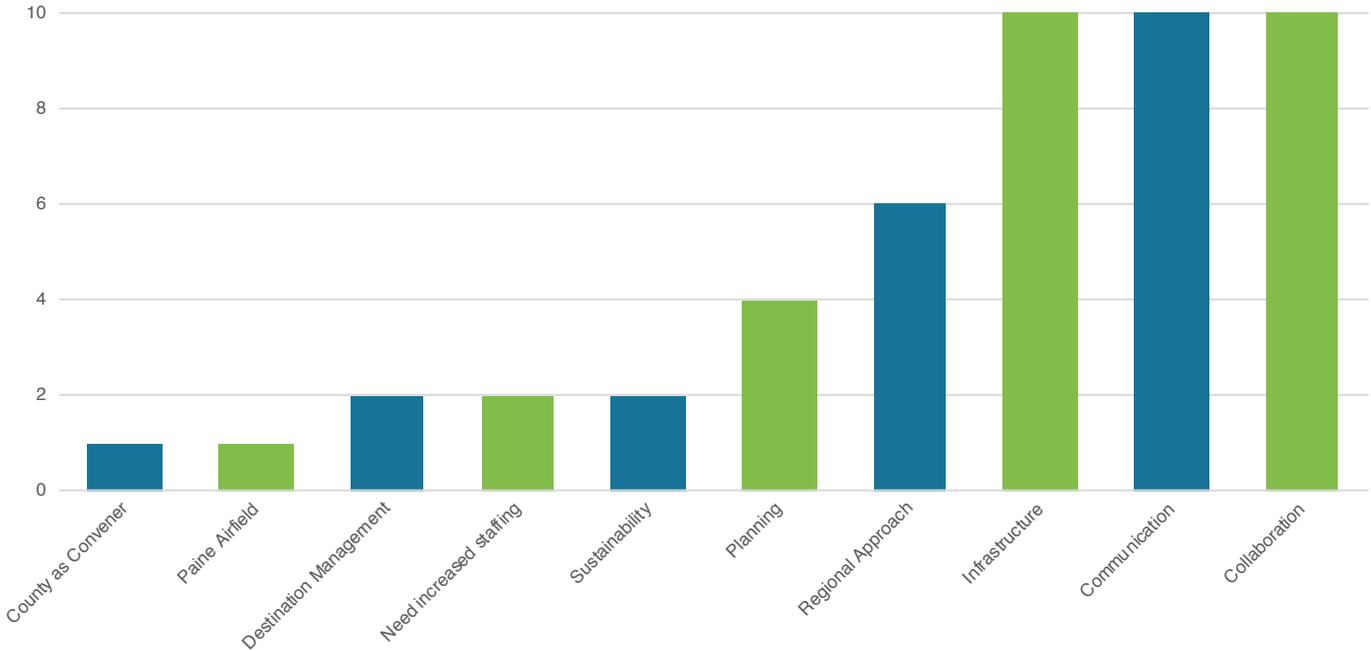
- Trends would suggest that Snohomish County destinations are well-suited for sustainable tourism development. Avoiding the pitfalls of overcrowding and over-tourism will require detailed and collective planning to achieve the preferred future.
- 100% of Think-Tank participants indicated that tourism development planning is important for Snohomish County.



5.2 TOP THREE TAKEAWAYS FROM THE TOURISM THINK-TANKS

At the close of each Think-Tank, participants were asked what they considered the three top takeaways from their participation in the Think-Tank.

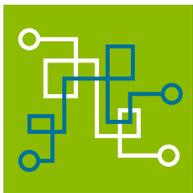
What are your top three takeaways from the Snohomish County Tourism Think-Tank? (Categorized responses)



Source: Snohomish County Regional Tourism Future Think-Tank Feedback Survey

“So important to keep regional meetings and workshops ongoing to continue to move forward to develop a regional, sustainable tourism industry and work to lobby successfully for needed transportation infrastructure.”

– Think-Tank participant (Feedback Survey)



FutureInsight

DATA INSIGHTS:

- Successful sustainable tourism development will require a long-term commitment to developing a compelling storyline for Snohomish County.
- An analysis of tourism industry trends highlights the need to be adaptable and responsive to the evolution of travel markets and travelers.

Industry stakeholders were clear on the importance of developing a regional approach, improved communication, collaboration and overall connectivity to achieve the preferred future



The dedication and professionalism of the staff at Snohomish County Tourism Bureau (SCTB) and Snohomish County Department of Parks, Recreation and Tourism (SCPRT) are big assets for the region's tourism industry.

6.0 ACKNOWLEDGEMENTS

The tourism industry representatives from the Basecamp Communities Region of Snohomish County engaged in the Think Tank workshop and discussions with great enthusiasm. Their passion and interest ensured the discussions were thoughtful, and the outcomes reflective of the region's perspectives. This dedication is reflective of the deep commitment Think Tank participants have to the future of their communities and local industries.

Future iQ would like to acknowledge the substantial support from the staff at Snohomish County Tourism Bureau (SCTB) and Snohomish County Department of Parks, Recreation and Tourism (SCPRT). The teams from these two key organizations contributed outstanding support to the Think Tank workshops, and helped facilitate and lead portions of important stakeholder discussions.

In particular, the following people are specifically acknowledged:

- Annique Bennett, Snohomish County Parks, Recreation and Tourism and Amy Spain, Snohomish County Tourism Bureau, who both provided strong leadership, guidance and support for this work and who generously shared their unique insight into the local tourism industry.
- Rich Huebner (Tourism Regional Projects Coordinator) and Nicole McMurray (Regional Tourism Projects Coordinator) for their excellent work on providing project support of the Think Tanks.
- Angie Riley, Marketing & Communications Manager, Snohomish County Tourism Bureau, for skilled scenario-group facilitation support.





8.0 ABOUT FUTURE IQ

Future iQ specializes in applying innovative tools and approaches to assist municipalities, organizations, regions and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents. To learn more about Future iQ, and our recent projects visit www.future-iq.com or by email at info@future-iq.com

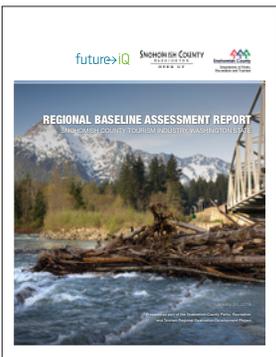
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VP Foresight Research



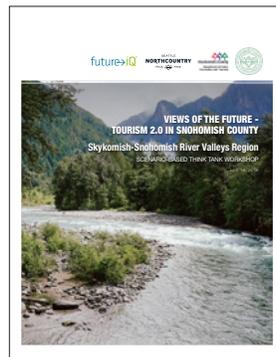
Snohomish County
Tourism Industry
Regional Baseline
Assessment Report
January 2018



Views of the Future - Tourism
2.0 in Snohomish County
Basecamp Communities Region
Scenario-based Think Tank
Workshop
June 2018



Views of the Future - Tourism 2.0
in Snohomish County
Coastal Communities Region
Scenario-based Think Tank
Workshop
June 2018



Views of the Future - Tourism 2.0
in Snohomish County
Skykomish-Snohomish River Valleys
Region Scenario-based Think
Tank
Workshop
June 2018



Views of the Future - Tourism 2.0
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June 2018



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