MONDAY, NOVEMBER 6, 2017

STIA Ratepayers Annual Meeting
Welcome

Introduction & Updates

TOM NORWALK
Mayor Tim Burgess
Leadership Certificate
Sean O’Rourke
GM of the Year
Washington Hospitality Association
2017 Advisory Board

David Dolquist
Chair
Seattle Marriott Waterfront

Amanda Parsons
Vice-Chair
Thompson Hotel Seattle

Rene Neidhart
At-Large
Renaissance Hotel Seattle

Howard Cohen
Clise Properties

Frank Finneran III
Springhill Suites Seattle Downtown

Richard Hill
W Hotel Seattle

Pritpal Singh
Hotel 1000

Shannon Sheron
Motif Seattle

Ben Thiele
The Palladian Hotel

Marcus Treppenhauer
Fairmont Olympic Hotel

Bill Weise
Silver Cloud Hotel – Seattle Stadium
Ratepayers Annual Meeting

Minutes Approval 11/14/16

AMANDA PARSONS
Introductions
2018 New Advisory Board Members
AMANDA PARSONS
2018 Advisory Board Term Extension through end of 2018

Amanda Parsons
Thompson Hotel Seattle
2018
New Advisory Board Members
(3-year term)

Keith Buck
Embassy Suites Seattle
Downtown – Pioneer Square

John Power
Loews Hotel 1000

Hayden Lingerfelt
Kimpton Hotel Vintage
Seattle
International Tourism Overview

JOHN BOESCHE
Total Overseas Visitors to Seattle

Between 2011 and 2016 visitor arrivals increased to 651,700 from 473,800, a total increase of 37.6% in 5 years.
## International Visitors to Seattle

### 2016 - 2017 & 2018 Projections ('000s)

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<thead>
<tr>
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<td>South Korea</td>
<td>64.3</td>
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<td>Japan</td>
<td>45.8</td>
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Source: Tourism Economics | rev. 10/31/2017
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Source: Tourism Economics | rev. 10/31/2017
Lauren Whicker
Account Director – Australia
GTI Tourism
Tourism Development: Inbound Travel
China

Japan

Germany

France

United Kingdom

Korea

TOTAL YTD

2016 VS. 2017 MEDIA VALUES

JANUARY – OCTOBER | USD

2016

2017
Tourism Development: Outbound Travel
Leisure Campaign Overview

ALI DANIELS
Where we started

2012 Advertising Review
Key Message

Seattle is a unique art, music and culinary destination with a rich tapestry of experiences waiting for you this weekend.

- Gauguin
- Taste Washington
- James Beard award-winning chefs
- Nirvana at EMP
- Pike Place Market
- Symphony, Opera, Ballet

2012 Advertising Review
Audience Identification

The Sophisticated Traveler

- A35+
- Well educated
- Higher income
- Active online
- Very mobile
- Drive or Fly
Where we started

2 DAYS IN SEATTLE
Where we started
Where we started

201 BUMBERSHOT BANDS
53 OUTDOOR CONCERTS
1 SWEET SOUNDED TRIP

What will you do with your 2?
2DaysInSeattle.com

39 ISLANDS TO EXPLORE
20 MINUTES OF UNFORGETTABLE VIEWS
1 PLACE WITH ENDLESS OPTIONS

What will you do with your 2?
2DaysInSeattle.com

42 WATERFRONT RESTAURANT PATIOS
5 PLACES TO RENT YOUR RIDE
1 AQUATIC ADVENTURE

What will you do with your 2?
2DaysInSeattle.com
Where we started
Website Traffic – 2012 through 2017 YTD

Unique Visitors

Visitseattle.org
Where we are

VISIT SEATTLE.tv
Video Analytics

- OVER 3,200 SUBSCRIBERS
- OVER 24.3MM VIEWS ON YOUTUBE ALONE
- OVER 50.2MM MINUTES OF WATCH TIME
- 64MM ORGANIC CONVERSATION IMPRESSIONS AROUND "VISITING SEATTLE"
SundanceTV | Project Five x Five
SundanceTV | Project Five x Five
CBS | The Emerald Race
Holidays

ON AVERAGE, YOU AND FELLOW RESIDENTS ABANDON 65,321 HOURS OF PAID TIME OFF EVERY YEAR. THAT’S ABSURD.

Lucky for you, we have some great suggestions to help you spend those unused vacation days here in Seattle.

Whether it’s taking in the lights of the magical Argosy Christmas Ships, enjoying holiday classics performed by the Seattle Men’s Chorus, skiing at Stevens Pass or experiencing the magic of the Nutcracker Ballet—this holiday, we’ll help you take a holiday.

How many hours of time off do you have to spend?

40
Holidays
Holidays
Shine A Light

ALL PEOPLE WELCOME
SEATTLE
MUSEUM
MONTH
Stay+Play

OUR REGION’S TOP MUSEUMS ARE HALF PRICE FOR GUESTS IN FEBRUARY.

Ask Hotel staff for details. seattlemuseummonth.com

STIA
TICKETS ON SALE DECEMBER 1
tastewashington.org
Public Relations

ALI DANIELS
Media Missions
YTD Coverage

Circulation Total: 448,223,788
Ad Value Total: $8,866,202
Total Stories: 325
Seattle Museum Month Coverage

Circulation Total: 333,906,102
Ad Value Total: $1,141,321
Total Stories: 560

Taste Washington Coverage

Circulation Total: 130,300,523
Ad Value Total: $1,279,509
Total Stories: 63
2017/2018 DMO Comp Set Budget Comparison

DMO BUDGETS (IN MILLIONS)

<table>
<thead>
<tr>
<th>City</th>
<th>TIA/TID/TMD Portion</th>
<th>Total Annual DMO Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nashville</td>
<td>$1.0</td>
<td>$27.0</td>
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<tr>
<td>Austin</td>
<td>$0.0</td>
<td>$14.3</td>
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<tr>
<td>San Diego</td>
<td>$36.1</td>
<td>$41.6</td>
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<td>Los Angeles</td>
<td>$26.0</td>
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<td>Denver</td>
<td>$4.6</td>
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<td>San Francisco</td>
<td>$24.5</td>
<td>$35.1</td>
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<tr>
<td>Portland</td>
<td>$11.7</td>
<td>$28.0</td>
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<tr>
<td>Vancouver</td>
<td>$3.5</td>
<td>$21.7</td>
</tr>
<tr>
<td>Seattle</td>
<td>$7.5</td>
<td>$22.0</td>
</tr>
</tbody>
</table>

Source: Each DMO listed above | rev. 10/17/2017
2018 Budget

- International FAMs, Site Inspections, Press Trips, Marketing Partnerships, Client Events & Missions: $800,000
- Special Events: $545,000
- Photography: $20,000
- Public Relations: $125,000
- Research: $96,800
- Advertising: $5,306,614
- Administrative Expenses: $696,586

Total Expenses: $7,590,000
Revenue: $7,590,000
Fund Balance: $2,214,702
### 2017 Forecast

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
<th>Estimated</th>
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<tbody>
<tr>
<td>Administrative Expenses</td>
<td>8%</td>
<td>$656,500</td>
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<tr>
<td>Marketing Expenses</td>
<td>92%</td>
<td>$7,411,478</td>
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<tr>
<td>Advertising</td>
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<tr>
<td>Public Relations</td>
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<td></td>
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<tr>
<td>Intl Fam, Site Inspect &amp; Press Trips</td>
<td></td>
<td></td>
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<tr>
<td>Intl Client Events &amp; Sales Missions</td>
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<td></td>
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<td></td>
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<tr>
<td>Market Research</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>8%</strong></td>
<td><strong>$8,067,978</strong></td>
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<tr>
<td><strong>Revenue</strong></td>
<td><strong>$7,496,000</strong></td>
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### 2018 Budget

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2018 Budget | Variances

International | ↓ $25,497
Total 2018 spend: $800,000 / 11% of Budget

FAMS | ($25,042)
- Decrease of funding aligns with strategic shift to focus on proactive, instead of reactive, inbound FAM hosting

CLIENT EVENTS AND MISSIONS | ($25,455)
- China Mission shifting to every other year format; no Mission in 2018
- Introduction of two new Missions – South Korea & Japan (March) and Australia (December)
- Client events at IPW, ITB, and opening of Flight of Dreams (Nagoya, Japan)

MARKETING PARTNERSHIPS | + $25,000
- Retainer fees and monthly expenses: China, South Korea, Germany, and Australia/New Zealand
- Minimal travel trade marketing and promotions
- Emphasis on follow-up consumer campaign (i.e. First Takes International) and distribution
- Maintenance of VS branded international assets and business suite
2018 Budget | Variances

Special Events | ↑ $110,000

Total 2018 spend $545,000 | 7% of Budget

- Taste Washington $125,000
- Clipper Round the World $150,000
- Upstream $190,000
- Rock ‘n’ Roll Marathon $80,000
2018 Workplan & Budget
Discussion & Vote
AMANDA PARSONS | RENE NEIDHART
Thank You
2017 Outgoing Advisory Board Members

TOM NORWALK | ALI DANIELS
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Ben Thiele
The Palladian Hotel
New Board Officers

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Richard Hill
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Upcoming Events

TOM NORWALK
Visit Seattle’s holiday breakfast

Presented by: Delta

When
Thursday, December 14
7:30-8:15 AM
Registration & Networking
8:15-9:30 AM
Program & Entertainment

Where
The Westin Seattle
1900 Fifth Avenue
Seattle, Washington 98101

Register
$60
Individual
$800*
Reserved Table of 10
*Includes your company name on the table sign and recognition in the presentation

Thank you to our sponsors

Signature Sponsors
Seattle Met
iolo Events

Event Sponsors
Iris & Peony
Jean-Marcus Syngle
PSAV
The Westin Seattle

#MySeattleFamily
visitseattle.org
Thank You & Reception

TOM NORWALK