MONDAY, NOVEMBER 5, 2018

STIA Ratepayers Annual Meeting
STIA Team
New Additions from Visit Seattle

Mellie Lutz
Director of Marketing

Justine Harris
Senior Coordinator, Sales & Marketing
Congrats!

Gerry Lamontagne
Courtyard by Marriott – Pioneer Square
Board Governance

AMANDA PARSONS
Introductions
2019 Advisory Board Candidates
AMANDA PARSONS
2019 Advisory Board Members Candidates (3-year term)

Cristy Smith
Crowne Plaza

Sebastien Pfeiffer
The Charter Hotel Seattle

Steve Vissotzky
Grand Hyatt & Hyatt Olive 8
Vote

- Ratepayers Annual Meeting Minutes Approval 11/06/17
- 2019 Advisory Board Candidates

AMANDA PARSONS
2018 STIA Review

TOM NORWALK | JOHN BOESCHE | KAUILANI ROBINSON
International Tourism Overview

JOHN BOESCHE
International Tourism Team
Visit Seattle

John Boesche
VP, International Tourism

Natalie Jushinski
Director, International Tourism

Marcus Carney
Tourism Manager

Tamara Thorhallsson
Tourism Manager

Marlo Pettie
Senior Coordinator, International Tourism
Total Overseas Visitors to Seattle

- **2013**: 481,000 (+15.3%)
- **2014**: 584,000 (+21.5%)
- **2015**: 622,000 (+6.4%)
- **2016**: 652,000 (+4.8%)
- **2017**: 696,000 (+6.8%)
- **2018 (F)**: 736,000 (+5.7%)
- **2019 (F)**: 779,000 (+5.8%)

Source: Tourism Economics | rev. 11/01/2018
## New International Air Service

<table>
<thead>
<tr>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Aer Lingus</strong></td>
<td><strong>Cathay Pacific</strong></td>
</tr>
<tr>
<td>SEA-DUB</td>
<td>SEA-HKG</td>
</tr>
<tr>
<td><strong>Air France</strong></td>
<td><strong>Delta Air Lines</strong></td>
</tr>
<tr>
<td>SEA-CDG</td>
<td>SEA-KIX</td>
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<tr>
<td><strong>Thomas Cook</strong></td>
<td><strong>Japan Airlines</strong></td>
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<tr>
<td>SEA-MAN</td>
<td>SEA-NRT</td>
</tr>
<tr>
<td><strong>Aer Lingus</strong></td>
<td><strong>Singapore Airlines</strong></td>
</tr>
<tr>
<td>SEA-DUB</td>
<td>SEA-SIN</td>
</tr>
</tbody>
</table>
SEATTLE FIRST TAKES – TOKYO ACTIVATION
WeChat CityExperience Mini Program
Hana Tour Integrated Campaign

시애들의 잠못 이루는 밤
Sleepless in Seattle

가족의 날
Family Day

문의 및 예약 | 1577-1233
VICE Australia Consumer Campaign
UK AGENCY INTERVIEWS AND LONDON CLIENT EVENT
Generated Media from Key Overseas Markets

Rolling Stone
InStyle
NATIONAL GEOGRAPHIC
TRAVELLER
lonely planet
marie claire Maison
I HEART
BSフジ
COSMOPOLITAN
Generated Media from Key Overseas Markets
January - September 2018 Media Values | USD

- **Australia**: $968,720
- **China**: $5,335,073
- **France**: $2,544,628
- **Germany**: $1,732,668
- **Japan**: $3,553,772
- **Korea**: $2,275,730
- **UK**: $3,124,582

**Total Media Value**: $19,535,173
Public Relations Overview

KAUILANI ROBINSON
Public Relations Team
Visit Seattle

Kaulani Robinson
Director, Public Relations

Chantelle Lusebrink
Public Relations Manager

Addie Davis
Senior Coordinator, Public Relations
Free Things to Do in February Across the U.S. and Around the World

Art and Architecture Lovers Will Be Traveling to These 5 Hot Spots in February

How to Visit Seattle’s Top Museums for Half the Price This Month

The Best Way To Spend Two Days In Seattle
TASTE WASHINGTON

CIRCULATION TOTAL: 76,121,121

AD VALUE: $818,348.65

TOTAL STORIES: MORE THAN 75
Media Missions 2018

NEW YORK
APRIL 2018

The New York Times

CONDÉ NAST TRAVELER
AFAR

DEPARTURES

TRAVEL + LEISURE

VOGUE

Wallpaper *

Forbes

STIA

LOS ANGELES
JUNE 2018

Los Angeles Times

Fodor’s Travel

EATER

Forbes

lonely planet

THE HUFFINGTON POST

WASHINGTON DC & BOSTON
JULY 2018

The Boston Globe

NATIONAL GEOGRAPHIC

EATER

metro

Global Traveler

U.S. News & WORLD REPORT

boston.com

THRILLIST
Top Media Coverage: YTD

CIRCULATION TOTAL: $32.6 BILLION

AD VALUE: 1.64 BILLION

TOTAL STORIES: 384
2018 Media Coverage Highlights

THE WALL STREET JOURNAL

The New York Times

CONDÉ NAST TRAVELER

The Best Cities in the U.S.: 2018 Readers’ Choice Awards

2. Seattle

The so-called Emerald City is getting a buff and polish. Part of ongoing renovations of the waterfront, Pike Place Market’s historic “marketer” is almost complete, marked by a modern plaza facing Puget Sound and panoramic views of the Olympic Mountains. After a $415-million reinvention, the Nordic Museum now sits in the Ballard district, the Scandinavian quarter that’s increasingly hip (norcemuseum.org). And the observation tower of the Space Needle—built for the 1962 World’s Fair—has reopened after an overhaul, complete with a wine bar on a revolving glass floor (space needle.com).

6. Seattle, WA

One of the most popular cities in the Pacific Northwest, Seattle draws crowds for its successful mix of innovative arts and technology, outdoor trails and coffee. You thought we’d say coffee, right? Well, that, too. It was a huge hit for our Seattle team. Seattle is not only home to the home-cooked cuisine, but also has numerous Michelin-starred restaurants. The city is known for its culinary scene, which includes some of the best seafood and steakhouses in the country. Seattle is a great place for foodies to explore. It has a vibrant food scene with a variety of restaurants and cuisine options.

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Seattle design takes a bold turn in 2016. Multi-year renovations at the Space Needle are underway, including a restaurant complete with a revolving glass floor scheduled to open this spring. Meanwhile, news of the gigantic NBBJ-designed Amazon SpheresFile with hundreds of plant species begins in early 2018. Architects will set the opening of the Pacific Northwest’s largest hotel, the 45-story Hotel X- fortune Seattle. Additionally, the Nordic Museum moves to a new Mithun-designed building featuring a moonscape, and the Seattle-based, internationally renowned Ballard neighborhood.

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2018 Media Coverage Highlights, Cont’d.

The Boston Globe
Interest in space tourism is sky high

Michele Petersen calls herself a space nerd. She has better qualifications than most.

Petersen is a program manager in the space systems branch of the Cambridge research-and-development company Draper. But as someone who grew up on "Star Wars" and shuttle missions, she admits to still experiencing a thrill when her work takes her to some of the most iconic landmarks connected with space.

CONDÉ NAST Traveler
What to Do in Seattle in September 2018

There's what's happening in the city this month.

Embrace '90s Nostalgia at These 'Sleepless in Seattle' Filming Locations

Get nostalgic over favorite moments from one of the most popular romantic comedies of the 90s as you explore movie locations across Seattle.

STIA
Leisure Campaign Overview

ALI DANIELS
Welcome
Leo Wills Daniels
2019 Workplan & Budget

TOM NORWALK
## 2019 Budget

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>International FAMs, Site Inspections, Press</td>
<td>$1,030,000</td>
</tr>
<tr>
<td>Trips, Marketing Partnerships, Client Events &amp; Missions</td>
<td></td>
</tr>
<tr>
<td>Special Events</td>
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<tr>
<td>Photography</td>
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<tr>
<td>Public Relations</td>
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<td>Research</td>
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<tr>
<td>Administrative Expenses</td>
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<tr>
<td>Estimated</td>
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<tr>
<td>Marketing Expenses</td>
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<td>Intl Marketing Partnerships</td>
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<td>Special Events</td>
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<tr>
<td>Revenue</td>
<td>$8,025,000</td>
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</tbody>
</table>
2019 Budget | Variances

International | ↑ $230,000
Total 2019 spend: $1,030,000 / 13% of Budget

CLIENT EVENTS AND MISSIONS | + $80,000
- Japan/South Korea Mission with multiple VIP client events, including Mariners game in Tokyo
- Sales trips to Australia and Germany, both engaging ‘Top 10’ customers and complementing marketing programs
- Co-sponsorship (Port of Seattle and Alaska Airlines) of Icelandair Mid-Atlantic opening dinner
- Client events/activations at IPW and/or WTM

MARKETING PARTNERSHIPS | + $150,000
- Introduction of UK market: retainer fees, monthly expenses, and B2B marketing
- Retainer fees and monthly expenses: UK, China, South Korea, Germany, and Australia/New Zealand
- Minimal travel trade marketing and promotions across all markets
- Focused direct-to-consumer campaign in select market(s); primary focus in 2019 is UK
- Maintenance of VS branded international assets and business suite
2019 Budget | Variances

Special Events | ↓ $97,534
Total 2019 spend: $465,000 / 6% of Budget

SPECIAL EVENTS | -$97,534
- No Clipper Round the World (-$150,000)
- Increase Upstream (+$17,000)
- Add Refract, The Seattle Glass Experience (+$50,000)
2019 Budget | Variances

Public Relations | $70,000
Total 2019 spend: $195,000 / 2% of Budget

PUBLIC RELATIONS | + $70,000
- Increase hosting
- Additional media blitzes
- Additional campaign support
2019 Workplan & Budget
Discussion & Vote
AMANDA PARSONS | BILL WEISE
Thank You
2018 Outgoing Advisory Board Members

TOM NORWALK
2018
Outgoing Advisory Board Members

Markus Treppenhauer
Fairmont Olympic Hotel
2018
Outgoing Advisory Board Members

Amanda Parsons
Thompson Seattle Hotel
Certificate of Excellence for Tourism Leadership

presented to

AMANDA PARSONS

With sincere gratitude from Visit Seattle and the Seattle Tourism Improvement Area

NOVEMBER 5, 2018

For your leadership as Chair of the Seattle Tourism Improvement Area in 2018 and for your many years of service on the STIA Advisory Board

Tom Norwalk, President & CEO
Visit Seattle
Introduce New Board Officers

TOM NORWALK | AMANDA PARSONS
2019
Advisory Board
Officers

Bill Weise | Chair
Silver Cloud Hotel – Seattle Stadium

John Power | Vice-Chair
Loews Hotel 1000

Frank Finneran III | At-Large
Springhill Suites Seattle – Downtown/South Lake Union
2019 Funding Outlook

TOM NORWALK | GREG DUFF | BILL WEISE
2018/2019 DMO Comp Set Budget Comparison

DMO BUDGETS (IN MILLIONS)

Source: Each DMO listed above | Updated 11.05.2018
GOAL

At the encouragement of the STIA Advisory Board, we will explore ways to increase the assessment in 2019.

DRAFT A NEW STIA ORDINANCE AND LEGISLATION THAT WOULD:

• Not impact, change or risk the current ordinance
• Increase assessment
• Allow for future increases (with STIA approval) so we would not have to go back to council
• Consider a small “give back”, to the MID, or SPD (for example) if that is politically helpful
• If we can be successful – we would kill the original STIA legislation
• Take this to our current council in early 2019 and if forced, pull it out if opposition is strong
TIMELINE

DEC - 2018
- STIA Funding Task Force meeting (Carla Murray, Richard Hill, Bill Weise, Shannon Sheron, Steve Vissoztky)
- Determine overall strategy options

Q1 - 2019
- Communicate and receive feedback from STIA Ratepayers on concept and timing
- Message to ownership groups as needed, to enlist support
- Create legislation and ordinance in consultation with OED, City Attorney and council
- Outline and plan for petition process

Q2 - 2019
- New legislation introduced into council
Upcoming Events

JOHN BOESCHE
VISIT SEATTLE'S

holiday breakfast

When | Wednesday, December 5, 2018

7:30AM
Networking & Pike Place Market Holiday Pop-Up

8:15AM
Program Begins

9:00AM
Program Ends. Networking & Pike Place Market Holiday Pop-Up Continues

9:45AM
Event Concludes

Where | The Westin Seattle, 1900 Fifth Avenue

$60
Individual Ticket

$800*
Reserved Table

*Includes ticket, welcome gift, and table sponsorship

Table sales close at 5:00pm on November 20, 2018

THANK YOU TO OUR SPONSORS

Signature Sponsor

Official Music Sponsor

Event Sponsors
Sports Star of the Year

Sheraton Grand Seattle
Thursday, February 7, 2019
6:00pm – 9:00pm
Visit Seattle Annual Meeting

Benaroya Hall
Monday, March 4, 2019
Thank You & Reception

TOM NORWALK
visitseattle.org