STIA Ratepayers
Annual Meeting

MONDAY, NOVEMBER 9, 2020
WELCOME:
Intro & Updates

BILL WEISE & TOM NORWALK
Board Governance
Questions & Vote for Approval
Resolution to Extend the Terms of Bill Weise, Sean O’Rourke & Steve Sasso

Questions & Vote for Approval
2021 Advisory Board Member Candidates (3-year term)

Juriana Spierenburg
citizenM SEATTLE SOUTHWAKE UNION

Bernard Phillipe
HILTON GARDEN INN
2021 Advisory Board Candidates

Questions & Vote for Approval
Public Relations Overview

KAU'ILANI ROBINSON
2020 Public Relations Highlights

Circulation Total: 2,622,208,365
Total Stories: 483

The New York Times
How to Staycation in 6 American Cities

2020 Virtual Pride
Coming Up in Q4 2020

“DO SOMETHING” MARKETING CAMPAIGN
• Pitching and hosting local/regional media and influencers, focusing on BIPOC.

HOLIDAYS
• Distributing press releases
• Pitching and hosting media

PR COUNCILS
• Seattle Travel PR Roundtable
• Washington Hospitality Association
• Downtown Seattle Association
• Seattle Hotel Association
SEATTLE MUSEUM MONTH
• Developing press releases
• Pitching and hosting local, regional and national media

TASTE WASHINGTON
• Developing press releases
• Pitching and hosting local, regional and national media

DIVERSITY & INCLUSION
• Engaging with BIPOC media and industry colleagues on updates to strategy, pitching, KPI's, etc.
• Black Lives Matter
• Pride
• SeaForShe

PR COUNCILS
• Seattle Travel PR Roundtable
• Washington Hospitality Association
• Downtown Seattle Association
• Seattle Hotel Association
Leisure Overview
Demand Generation

IN THE FIRST SIX WEEKS

• Delivered 160,000 visits to visitseattle.org booking page
• Drove over 1,500 room bookings
• Yielded 4:1 ROI
Seattle Museum Month

2020 HIGHLIGHTS

• 6th annual Seattle Museum Month with 41 hotels and 62 hotels participating
• Over 14,000 redemptions made at the museums
• Over 10K room nights booked and 26K travelers during the month of February
COVID-19 Response

You don’t need to be in Seattle to love Seattle.

In times of crisis, the most natural thing to do for those of us in the travel/tourism industry would be to encourage you to take a vacation, break out of your box, explore somewhere new - all of which is unfortunately not possible in our current situation. In light of this, we are doing the next best thing we know how to do: bringing the inspirational stories of Seattle to you. While we are physically distant for the time being, we hope this will help you feel a little more connected to the city you’ve come to love.

This too shall pass. And someday, the doors to travel will be re-opened to us all. In the meantime, consider these videos permission to dream of your next trip. We will be eager to welcome you when that time comes.

WATCH VISITSEATTLE.tv
Support for Black Lives In Seattle
THE SEATTLE GLASS EXPERIENCE

OCTOBER 15-18, 2020
King County Recovery Campaign
SAVOR SOMETHING

GET A SLICE OF LIFE
From pizzas to pastries, sout your taste buds. King County is a paradise for foodies. Mix up and slow down for yourself and for your community.

BOOK SOMETHING

TREAT YOURSELF
From spa days to wine tours, your romantic getaways are closer than you think. Mix up and stay in King County to experience the best of local flavors.

SHOP SOMETHING

FIND YOUR OUTLET
From local villages to urban areas, whatever you're looking for, you'll find it here. Mix up and shop local for yourself and for King County.
STIA Downtown
Specific Recovery
Holidays 2020
6-WEEKS FOR 2021!

SEATTLE MUSEUM MONTH

FEBRUARY 1 - MARCH 14
DOWNTOWN HOTEL GUESTS ENJOY
HALF OFF MUSEUM PRICES

taste WASHINGTON
Seattle: ready when you are

As you start planning your next adventure, know that Seattle has been planning too. Whether it is next week or next year, we will be ready for you. In the meantime, we’re here to provide you with some travel inspiration.

Explore now

Save up to 15% on select Seattle hotels*

Receive up to 15% off when you stay at select hotels in downtown Seattle and experience some of the Emerald City’s best restaurants, attractions, and shopping all within walking distance.

See deals
2020 Activities

Prior to the COVID-19 related shutdown, in-person sales and media opportunities included:

- Brand USA’s Mexico Mission
- IITA Summit
- NAJ’s Receptive Tour Operator Summit

Visit Seattle has taken advantage of virtual tradeshows opportunities throughout the year:

- Go West Summit
- Brand USA Global Marketplace (Travel Week Europe)

We have also found opportunities to remain visible in the marketplace:

- Free or discounted destination updates/inspiration via trade/media partners
- Visit USA travel agent training and consumer events
Reacting to COVID-19 & Looking Forward

2020 ACTIONS:

• Eliminate exploratory efforts in SE Asia, India and Mexico.
• Reduce and/or eliminate in-market agency contracts in China, South Korea, Japan, UK/Ireland, Germany, France and Australia/New Zealand.
• Re-prioritize key overseas markets with recovery potential front-of-mind.
• Focus on supporting global travel trade, especially 2021/2022 contracting and product development.

LONG TERM STRATEGY:

• Re-imagine efforts and partnerships with domestic travel trade
• Greater focus on Canada when border restrictions ease
• Canada represents 70% of international visitation and 8% of all overnight visitation
• Maintain Seattle’s presence in key overseas markets with limited agency support and budget
• Partner with airline and influential media/trade to generate awareness in top 1-2 overseas market(s)
2021 Budget
Tourism Economics Forecast

HOTEL ROOM DEMAND IN SEATTLE TIA, THREE SCENARIOS
ROOMS, MILLIONS

<table>
<thead>
<tr>
<th>Year</th>
<th>Upside</th>
<th>Baseline</th>
<th>Downside</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>4.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>1.4</td>
<td>1.3</td>
<td>1.3</td>
</tr>
<tr>
<td>2021</td>
<td>3.4</td>
<td>2.7</td>
<td>1.9</td>
</tr>
<tr>
<td>2022</td>
<td>4.3</td>
<td>4.0</td>
<td>3.3</td>
</tr>
</tbody>
</table>
LOST VISITOR SPENDING IN SEATTLE (KING COUNTY), THREE SCENARIOS
PERCENT OF TOTAL SPENDING COMPARED TO 2019

Source: Tourism Economics; rev. 10/2020 |
### 2020 Forecast

<table>
<thead>
<tr>
<th>Expense</th>
<th>Percentage</th>
<th>Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Expenses</td>
<td>17%</td>
<td>$574,082</td>
</tr>
<tr>
<td>Marketing Expenses</td>
<td>83%</td>
<td>$2,835,811</td>
</tr>
</tbody>
</table>

**Total Expenses** $3,409,093  
**Revenue** $2,637,957  
**NET** ($771,936)

### 2021 Budget

<table>
<thead>
<tr>
<th>Expense</th>
<th>Percentage</th>
<th>Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Expenses</td>
<td>12%</td>
<td>$724,088</td>
</tr>
<tr>
<td>Marketing Expenses</td>
<td>87%</td>
<td>$4,965,550</td>
</tr>
</tbody>
</table>

**Total Expenses** $5,689,638  
**Revenue** $4,742,695  
**NET** ($946,943)
2021 Budget

Advertising………………………………………….. $4,500,000
International FAMS, Site Inspections, Marketing Partnerships, Client Events & Missions…………………………………….. $75,000
Administration (Salaries & Operating Exp.)………………$724,088
Photography…………………………………………….. $15,000
Special Events…………………………………………$100,000
Market Research……………………………………...$100,550
Public Relations & Press Trips…………………………$175,000
Advertising……………………………………….. $4,500,000

Total Expenses…………………………………....$5,689,638
Total Revenue……………………………………..$4,742,695
Fund Balance………………………………………..$2,224,551
2021 Budget Variances

SPECIAL EVENTS $200,000 from 2020 budget
Total 2021 Spend: $100,000 / 2% of Budget

SPECIAL EVENTS | $100,000
Taste Washington | $50,000
Rock ‘n’ Roll | $25,000
Refract | $25,000
2021 Budget Variances

INTERNATIONAL $1,289,000 from 2020 budget
Total 2021 Spend: $75,000 / 1% of Budget

FAMS | $25,000
• Inbound hosting of select travel trade and media, specifically focusing on new non-stop flights, IAF grand opening, and other major events throughout the year.

MARKETING PARTNERSHIPS | $50,000
• No annual retainers with in-market agencies
• Project-focused work in 1-2 markets showing potential for strong 2021 recovery (ex: UK/Ireland)

CLIENT EVENTS & MISSIONS | $0
• None for 2021; focused on IPW 2021 and Brand USA Travel Week 2021 (both VS budget-supported)
2021 Budget Variances

PUBLIC RELATIONS | $111,000 from 2020 budget
Total 2021 Spend: $175,000 / 3% of Budget

PUBLIC RELATIONS | $175,000
• PR agency support for crisis communication, brand awareness and leisure marketing campaigns – Seattle Museum Month, Taste Washington, Refract and Holidays
• Media hosting
• Opportunity for regional media blitzes – Focus on West Coast cities
Questions & Vote Approval
Funding Update & Past Due Assessments
New Board Officers

TOM NORWALK
2021 Advisory Board Officers

Bill Weise, Chair
SILVER CLOUD HOTEL – SEATTLE STADIUM

Sean O’Rourke, Vice Chair
SEATTLE MARRIOTT WATERFRONT

Steve Sasso, At-Large
MOTIF SEATTLE
QUESTIONS?
Thank you
STIA
SEATTLE TOURISM IMPROVEMENT AREA