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Organization

Executive Summary

The entire Experience Olympia & Beyond (EOB) team has had a hand in crafting the 2023 Business & Marketing Plan. The process we employed, and the product that resulted is personal to each of us. We believe in the significance of our work to our community and visitors to the area, and we believe in the incredible, special nature of Thurston County so we've taken extra care in leaving no stone unturned in how we can best accomplish our objectives for the year ahead.

The 2023 Business & Marketing Plan sets a strategic course for our team conducting destination marketing and sales throughout the year in effort to meet our annual goals of 25% growth in marketing KPIs, 15% growth in sales KPIs, and a return to hotel/motel occupancy on par with 2019—pre-COVID-19. This year's plan is informed by primary research consisting of Datafy traveler movement findings, Google Analytics, and comprehensive sentiment survey findings completed by prospective visitors, stakeholders, and residents. Secondary research was also integrated including findings from Destination Analysts' State of the American Traveler, U.S. Travel Association, Longwoods American Travel Sentiment Survey, Sports Events & Tourism Association State of the Industry Report, Destination Next Futures Study, and the STR Market Recovery Monitor, among others.

Through this aggregate of findings, we ascertained three overarching objectives for 2023:

- 1. Maximize our brand and image.
- 2. Increase our positive economic impact on the community.
- 3. Enhance the destination experience for locals and visitors.

All work completed throughout the year will support the successful completion of these objectives. The 2023 Business & Marketing Plan provides details around the "why" of our full body of work for the year. Details around the "how" are outlined in our staff internal workplan which outlines all tactics, budgets, timelines and accountability .

I. Introduction

Experience Olympia & Beyond (EOB) leads the charge for the hospitality and tourism industry in Thurston County by providing value for visitors, local businesses, organizations, and residents. We serve as our region's definitive resource for tourism information, creating opportunities for visitors to connect with our destination, and amplifying the importance of the tourism and hospitality industry. Our partnership-based organization supports the economic growth of our community by actively applying our resources to new opportunities, sharing with our peers in the industry, and always balancing the needs of visitors with those of our destination. We ask ourselves, is it good for our guests, AND is it good for Thurston County? If the answer is yes, then we will lend our expertise, effort, and enthusiasm!

Throughout all aspects of our work, EOB is committed to complying with the terms of our Board-approved bylaws, interlocal agreements, and contracts associated with enabling legislation tied to our performance. We serve as Thurston County's Tourism Promotion Area (TPA) Manager and are responsible for administering the activities and programs of the TPA as outlined in RCW Chapter 35.101. Our performance is also tied to the terms as outlined in RCW Chapter 67.28.1816 dictating permissible uses of lodging tax funding for tourism promotion by destination marketing organizations. We market our destination to individuals and groups 50+ miles away from Thurston County, we nurture relationships with our stakeholders and residents, and actively advocate for the Thurston County hospitality and tourism industry.

II. Strategic Plan Implementation

In 2021, Experience Olympia & Beyond contracted with MMGY to develop a <u>3-year strategic plan</u> for the organization. The purpose of this plan was to provide an updated vision and mission, new strategic goals, actionable initiatives, and new targets.

MMGY implemented their NextFactor program and engaged many of Experience
Olympia & Beyond's board members, local government leaders, key stakeholders, industry clients, and residents to ensure the broadest possible range of input to develop the plan. The project included:

- MMGY's DestinationNEXT assessment of Thurston County.
- One-on-one interviews of key industry and community leaders.
- Board and management sessions.

This Strategic Plan was produced by Deb Archer, Executive Consultant, and Shirin Jafari, Destination Development Director.

The four key pillars of the plan—Sales & Marketing, Destination Management, Sustainable Organization, and Community Alignment—were at the forefront of the EOB 2022 Business & Marketing Plan as staff focused on and completed many elements of the strategic plan. Unfortunately, however, Thurston County and EOB like most of the tourism industry, continued to experience impacts relating to the COVID–19 pandemic and because of related resource limitations, was not able to complete all tasks hoped for in 2022. Those deliverables will be rolled into the

2023 and 2024 Business & Marketing Plans, allowing more time for economic recovery.

Sales & Destination Marketing Management

Sustainable Organization

Community Alignment

III. Governance

Mission

We reveal the most iconic Thurston County experiences for the world to discover.

Vision

To be known as a top travel destination in the Pacific Northwest.

Values

Accountability - We take responsibility for our words, actions, results, and everything in between.

Collaboration – We do our best work when we recognize one another's strengths—we listen, support, and adapt together.

Respect - We value diverse perspectives and treat people with dignity and professionalism.

Trust – The relationships we build are rooted in our ability to instill confidence that we are experts in our field, our actions are fair, and our behavior is responsible and reliable.

Integrity - Our organization is transparent and firmly rooted in the highest ethical standards.

Empathy - We care about the well-being of others and show kindness and caring every day.

Board of Directors

Patty Belmonte, Hands On Children's Museum, Secretary Christina Daniels, Huber's Gasthaus, Treasurer Chuck Denney, Tumwater Parks Dept. Amy Evans Harding, Port of Olympia Sue Falash, Regional Athletic Complex (RAC), President Sans Gilmore, Sans M. Gilmore, PS, Inc., Executive Board Member At-Large Angela Jefferson, Tumwater City Council Ed Kunkel, Lacey City Council Hanford McCloud, Nisqually Tribe Aslan Meade, Thurston Economic Development Council Jill Nelson, Nelson Ranch Mike Reid, City of Olympia Line Roy, City of Yelm Satpal Sohal, La Quinta Inn & Suites—Tumwater, Vice President Rick Walk, City of Lacey Shina Wysocki, Chelsea Farms Oyster Bar

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Funding

Experience Olympia & Beyond is funded through a variety of mechanisms including Tourism Promotion Area (TPA) assessments, lodging taxes, and private funds. While our funding structure is diversified, a key objective of the organization is to increase and diversify funding further.

About Our TPA

Terms of Tourism Promotion Areas are governed by RCW Chapter 35.101 and administered by an interlocal agreement between Experience Olympia & Beyond and Thurston County. Our interlocal agreement was established in 2014, carries a three-year term and was last renewed in 2022. In 2023 TPA collections are budgeted to represent 65.62% of our budget. These funds are earmarked for projects and operations dedicated to generating visitation to Thurston County with the intent to generate overnight stays.

About Lodging Tax Funding

Experience Olympia & Beyond applies for lodging tax funding from Thurston County municipalities with lodging properties collecting and distributing lodging tax awards. In 2023 EOB has been awarded funding from the City of Olympia, City of Lacey, and City of Tumwater, and intends to apply for funding from the City of Yelm. Experience Olympia & Beyond does not apply for lodging tax funding from Thurston County. Terms of lodging tax funds are governed by RCW Chapter 67.28.1816. In 2023 lodging tax awards are budgeted to represent 20.19% of our budget. These funds are earmarked for projects and operations dedicated to generating visitation to Thurston County and potentially resulting in overnight stays.



About Private Funding

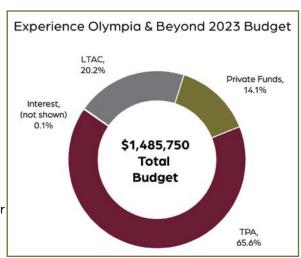
Experience Olympia & Beyond staff raise supplemental revenue from a variety of sources—paid advertising from local tourism-related businesses and organizations, paid sponsorships from Thurston County, the Port of Olympia and tribal nations, and event-related revenue (event sponsorships and ticket sales). In 2023 we will aim to increase private funding by deploying new advertising and sponsorship opportunities. In 2023 private funds are budgeted to represent 14.05% of our budget. These funds can be used to offset expenses that cannot be covered using TPA or lodging tax funding.

Budget

The 2023 budget was presented and approved by the following in the summer of 2022:

- EOB Budget & Policy Committee
- EOB Executive Committee
- · EOB Board of Directors
- Thurston County Hotel and Motel Commission (TPA Board)
- Thurston County Commissioners

A formal mid-year budget adjustment process for 2023 will begin in summer of 2023 in addition to proposing the 2024 budget. The proposal for the adjustment and upcoming budget will be presented to the same parties that reviewed and approved the 2023 budget.



Accommodations Goals	2023 Goal
Hotel Occupancy	68.2%

Marketing Goals	2023 Goal
Unique Web Visits	334,468
Social Media Audience	27,561
Consumer E-Newsletter Subscribers	14,220
Visitor Guides Mailed	1,463
Earned Media Placements	111
PR Impressions	1.254.593

Group Sales Goals	2023 Goal
Lead Room Nights	5,605
Booked Room Nights	771
Leads	59
Leads Booked	16

Sports Sales Goals	2023 Goal
Lead Room Nights	11,316
Booked Room Nights	8,016
Leads	32
Leads Booked	17
Visitor Services Goals	2023 Goal
Certified Tourism Ambassadors Trained	90

Goals & Key Performance Indicators (KPIs)

In 2023 Experience Olympia & Beyond staff will aim to increase all marketing KPIs by 25%. KPIs tracked and measured include:

- Unique web visits
- Social media audience
- Consumer e-newsletter subscribers
- Visitor guides mailed
- Earned media placements
- PR impressions

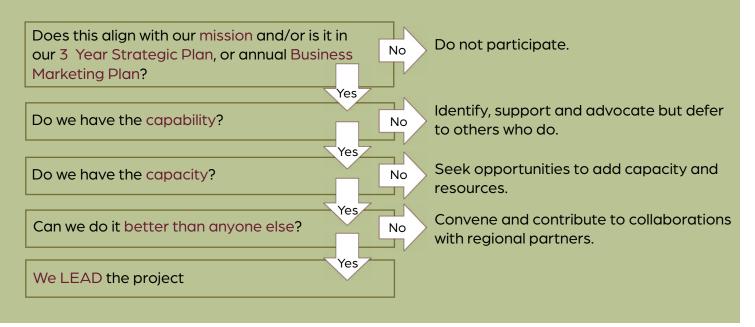
We plan to increase all sales KPIs by 15%. KPIs tracked and measured include:

- Lead room nights
- · Booked room nights
- Meeting & event leads
- Meeting & event leads booked

We plan to train 90 new Certified Tourism Ambassadors (CTAs).

We plan hold occupancy steady at 2019's pre-COVID rate of 68.2%.

Our Decision Making Process



IV. Brand Architecture

The Experience Olympia & Beyond brand was created and launched in 2017 to communicate directly with consumers and easily orient potential visitors to Thurston County's physical location and position/role as Washington State's capital.

In 2022 we added a new dimension to our branding strategy—co-brands were created for all Thurston County communities in effort to link each community to the Experience Olympia & Beyond brand, and further orient potential visitors to the additional opportunities just beyond Olympia. The Experience Olympia & Beyond brand will serve as the primary image for out of area marketing and the co-brands will be used within digital and printed community guides. The co-brands are also made available to community stakeholders for their use.

In 2023 we will refresh our brand family—updating typography and expanding our brand architecture based on extensive research gathered in Autumn, 2022.

Brand Refresh

We feel that our logo continues to live up to its job of orienting visitors to Thurston County's physical location and position/role as Washington State's capital. We felt however, that the time was right to update the typography to a more classic font set. And while the logo color palette has not been changed, we expanded the branding color palette for further campaign and cobranding development. We created a logo variation to meet the needs of non-horizontal uses, and then applied all to our full complement of community co-brands.



rectangular format



Logo Updates



Our Color Palette

MAIN COLORS



SECONDARY COLORS



Updated Typography

Easy for the reader-that's the goal. We keep things consistent by sticking to our brand fonts.

Our design font is Acumin Pro Wide – used for headers.
Our system font is Arboria – used for page titles, subheads, and body text.

ACUMIN PRO WIDE ABCDEFGHIJKLMNOPQRSTUVWXYZ 1234567890

Arboria Book ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz 1234567890

Positioning Statement

Washington State's capital—a passionate community of independent thinkers, hard workers, local craftsmen, and artists inspired by the region's diverse natureal beauty—evergreen forests, the Puget Sound, prairies, lakes, rivers, and streams.

Our Promise

We welcome and extend warm hospitality to all guests to Thurston County, delivering hand-crafted, authentically PNW experiences every time.

Personality/Character

Diverse, independent, eclectic, friendly, free-spirited, genuine, nature loving.

Key Campaigns

Campaigns are an important element to our branding work because while they do not replace our main brand, they support it and our image by communicating our values. The You Belong Her campaign puts our commitment to DEI into action allowing individuals to see themselves in our destination, and feel welcome. Made in Thurston County allows us to visually identify those attributes that characterize our destination—our people, their handiwork, and their legacies. The Power of Hospitality campaign will centralize communications about the value of tourism work and its impact on locals and visitors. These campaigns may be seen in opt-in communications such as our Partner and Visitor E-newsletter, on experienceolmpia. com and in social media.

Three campaigns will work hand in hand in 2023 to put our commitment to DEI into action, highlight those attributes that truly characterize our destination—our people and their legacy—and visually convey the power of tourism in Thurston County.

You Belong Here

Invites visitors, locals, and stakeholders to recognize themselves in our region, know that they are welcome, valued, and play an important role in our destination.

Made in Thurston County

Local–centric storytelling showcasing people, places and products that are uniquely Thurston County.

The Power of Hospitality

Campaign targeting residents and stakeholders, educating them about the value of our industry, its impact on the lives of locals and guests.



Key Attributes/Sectors

- · Food, dining, bars, nightlife
- Unique shopping
- Book lovers
- Outdoor escapes
- Sports & wellness
- Arts & culture

Each campaign will target our destination's target verticals.

V. Travel Decision-Making Process

Phase	Influencing Factors & Forces
Dreaming	Friends and family, content creators/social media influencers, advertising, earned media/articles, visitor guides
Planning	Friends and family, content creators/social media influencers, earned media/articles, visitor guides, website, tradeshows (sales—sports, meetings, group leisure/tour & travel), FAM tours (sales—sports, meetings, group leisure/tour & travel)
Booking	Friends and family, content creators/social media influencers, earned media/articles, visitor guides, website, tradeshows (sales—sports, meetings, group leisure/tour & travel), FAM tours (sales—sports, meetings, group leisure/tour & travel), travel agent, OTA promotions (Google Travel, Expedia, hotels.com, Orbitz, etc.), review sites (Yelp, TripAdvisor, etc.)
Experiencing	Friends and family, visitor guides, website, review sites (Yelp, TripAdvisor, etc.), individuals at local attractions and amenities—services in-market, interpretation and signage, mobile apps
Influencing	Friends and family, social media, review sites (Yelp, TripAdvisor, etc.)

Common denominator across all phases of the planning process: Friends and Family



VI. Research Tools & Methodology

The Director of Strategic Initiatives works with the CEO to select and employ industry-leading research tools and practices with which to shape EOB's strategic decisions. Sales initiatives, marketing programs, campaigns and organizational operations are evaluated through the lens of data and tourism industry best practices.

Primary research is conducted Summer-Fall through the development and execution of EOB's 360-degree sentiment survey, where prospective visitors, residents and stakeholders are asked similar questions regarding their perceptions about the destination and the visitor experience.

Secondary research is employed year-round through a combination of tourism industry research tools and reporting mechanisms including but not limited to:

- Datafy (visitor and residential movement analysis tool)
- AirDNA (short term rental analysis)
- STR (hotel motel analysis)
- Google Analytics (website visitation)
- Social Media (fans/follower analytics)
- Tourism Economics (economic impact)
- Sports and Events Economic Impact Calculators (economic impact)



VII. Audiences Defined

Key Verticals

Visitors come to Thurston County for a variety of reasons. Experience Olympia & Beyond staff aggregate these guests and target strategies and related tactics, which we refer to as verticals, based on their unique needs and preferences. Verticals our program targets include:

Independent Leisure Travelers

Individuals traveling alone or with friends or family. These audiences predominantly book their own travel domestically, and via travel agencies abroad.



Group Leisure Travelers

Individuals planning private group travel experiences: weddings and reunions.

Tour & Travel Planners

Professionals packaging and selling preset itineraries including lodging and activities for groups and FITs (interpreted as fully independent traveler when referring to domestic travelers, or foreign independent travelers when referring to overseas guests).





Meeting planners-professionals tasked with booking directly on behalf of groups seeking spaces and lodgings for small to medium-sized groups. **Sports event organizers**-professionals and volunteers tasked with securing sports venues, lodgings, and incentives to bring their event to the area.

Residents

individuals living in Thurston County.





Stakeholders

Key individuals living and working in Thurston County and/or other key tourism industry roles that affect or are affected by the work performed by Experience Olympia & Beyond.

Leisure Travelers

Experience Olympia & Beyond employs a variety of research tools in-house such as Datafy (visitor movement analysis tool based on phone location services) and pairs these findings with current industry trend data obtained from sources including Destination Analysts State of the American Traveler Report with which to identify key segments within our leisure traveler audience. Below each audience age segment is broken out along with its percentage of share of visitor market in 2022. Thurston County currently enjoys a balanced mix of visitors although it skews heavy among GenX and Boomers. Millennials and GenZ are emerging markets to be cultivated.

Gen X and Boomers (45-64: 34.5%, 65+: 25.2%)

Couples, multi-generational travel

- Visiting Friends & Relatives
 (VFR)
- 2. Finding Familiarity-visited before and want to return
- Away from the crowdsseeking atmosphere, space, exploration, discovery
- 4. Food & Cuisine
- 5. Access to Water

Millennials (25-44: 29.2%)

Solo Travelers, couples, families

- Visiting Friends & Relatives
 (VFR)
- 2. Food and Cuisine
- 3. Finding Familiarity-visited before and want to return
- 4. Adventure
- Away from the crowdsseeking atmosphere, space, exploration, discovery

Gen Z (16-24: 11.1%)

Couples, friends, groups

- 1. Adventure
- 2. Food & Cuisine
- 3. Visiting Friends & Relatives (VFR)
- 4. Finding Familiarity-visited before and want to return
- 5. Shopping

Top Arrival Markets

EOB also utilizes Datafy to evaluate target markets. We examine where current visitors travel from, how long they stay, and if they are overnighting in paid accommodations.

Top Arrival Markets by Total Visitation

- 1. Portland, OR
- 2. Vancouver, WA
- 3. Seattle, WA
- 4. Everett, WA
- 5. Longview, WA

Overnight Stays In Paid Accommodations

- 1. Vancouver, WA
- 2. Portland, OR
- 3. Longview, WA
- 4. Seattle, WA
- 5. Everett, WA

Opportunity Markets-By DMA*

- 1. Los Angeles, CA
- 2. Eugene, OR
- 3. Sacramento-Stockton,
- 4. Phoenix-Prescott, AZ
- 5. San Francisco-Oakland-San Jose, CA

Group Leisure

- Wedding Planners
- Individuals planning family reunions

Tour & Travel

Professional leads accessed from trade shows, referrals from other Destination Marketing Organizations, and inbound leads received via experienceolympia.com; leads generated from advertising. Lead types include:

- Receptive Operators
- Tour Operators
- Travel Trade Media

If funding allows, Cvent or other like product may be employed to expand lead generation.

Meetings

Meeting planner professionals representing the following groups:

- Associations
- Government
- Non-Profit
- SMERF (Sports, Military, Education, Religious and Fraternal)
- Ethnic
- Corporate

Sports

Sports event planners representing the following segments:

- Adult Amateur
- Collegiate Championship level
- Youth Amateur

Outdoor Sports Segments: Soccer, Rugby, Golf, Baseball/Fastpitch, Softball, Lacrosse, Flag Football, Cycling, Pickleball

Indoor Sports Segments: Basketball, Volleyball, Pickleball

*Desginated Marketing Area-- term used for advertising targeting



Residents/Stakeholders & Organization

- Individuals living in Thurston County
- Hotel/Motel owners located within Thurston County
- Short term rental owners located within Thurston County
- Stakeholders
 - Experience Olympia & Beyond Board of Directors and previous Board members
 - Chambers of Commerce
 - Olympia Downtown Alliance
 - o Port of Olympia
 - ° Thurston Economic Development Council
 - Local municipalities—elected officials and staff
 - Other community services impacting or impacted by tourism: higher education institutions, medical facilities, real estate, etc.
 - o Industry peers and affiliations:
 - State of Washington Tourism (SWT)
 - Washington State Destination Marketing Organizations (WSDMO)
 - Washington Filmworks
 - Port of Seattle
 - Visit Seattle
 - Destinations International
 - DMA West



VIII. Strategic Issues

1. Maximize Brand Value

Because our organization is still recovering from the impacts of the COVID-19 pandemic, like most in the travel industry, our team and resources are still smaller than they were pre-pandemic. This means while much work must be done to improve awareness and perception of our destination brand, we are challenged by our resource constraints. In 2023 we will prioritize relationship building and education across all verticals.

Advertising efforts will be selected carefully, ensuring maximum measurable result per investment. A variety of advertising methods will be combined including print, opt-in email, digital programmatic display and paid social media. Messaging will aim to grow our audience, form and cement relationships, and drive overnight visitation.

We will increase communications and educational efforts with our stakeholders and residents about our region's unique attributes and amenities, and the positive impact of tourism in their day-to-day lives. We will empower locals to play an essential role in the hospitality process—positively influencing visitor brand perceptions and experiences. We will share research findings, trends, and industry best practices with regional stakeholders to build pride, foster collaboration, and motivate creative problem solving to enhance and improve the destination experience.

We'll apply this approach to all verticals. While Thurston County benefits from leisure travelers' awareness of Olympia as Washington State's capital city, increased communication and educational efforts will be deployed to cement the Experience Olympia & Beyond brand and image as a top destination in the Pacific Northwest, and to disperse visitation throughout the county, to local attractions, natural areas, and off-peak timeframes. We'll target event planners, travel planners and tour operators, expanding communications and educational initiatives to improve brand and image perceptions around Thurston County's role as a top destination for small to medium-sized meetings, sports events, tours, and group leisure travel.

2. Increase Economic Impact

We aim to enhance Thurston County's economy by growing overall visitor volumes and more significantly, focusing on increasing paid lodging occupancy by extending visitors' average time in market to 4 days from our present average of 3.6 days. We will accomplish this by executing a comprehensive, research-based marketing and sales program targeting the highest value markets for our destination from 50+ miles away, AND by putting our locals to work as our informal ambassadors on the ground. We will encourage locals to invite their friends and family to Thurston County (or to come back to Thurston County). We will empower locals to share expanded, interest-based packaged experiences, including paid lodging options, to include more than four days of unique Thurston County activities. We will educate our stakeholders on how to access this information as well as local events, and how to put that information into the hands of their guests. We will increase our marketing focus to support growth in all sales verticals: group leisure/tour and travel, meetings, and sports. We will also expand efforts to extend these visitors' stays in the area by providing expanded visitor information via preset, interest-based itineraries and packaged experiences.

Procedurally, we'll aim to create content that is meaningful and engaging across all verticals, kicking off the travel decision making process. We will connect prospective visitors to our content through a growing social media presence, advertising and earned media. We'll create and share communications that resonate with each audience, aiming to grow our leisure traveler base and extend overnight stays by linking all other verticals to leisure traveler programming.

3. Enhance the Visitor Experience

EOB will share current research findings with key stakeholders, and work in partnership to improve the destination experience both for residents and visitors to Thurston County. Visitors will receive planning support in advance of their trip via social media, our monthly e-newsletter, online at experienceolympia.com, through our Visitor Guide, Community Guides, the Thurston Bountiful Byway Map, and "on the ground" from family, friends and locals. Experience Olympia & Beyond will better leverage our existing program, Certified Tourism Ambassadors, to support this objective as well.

IX. Strategies & Tactics

The Experience Olympia & Beyond team will work together centralizing efforts around three key strategic objectives:

- 1. Maximize Brand Value & Image
- 2. Increase Economic Impact
- 3. Enhance the Destination Experience

Tactics to put these strategies into action will include:

1. Maximize Brand Value & Image

- Update, enhance and clarify our brand: all verticals
- Increase brand impact through campaign-based content:
 - ° Help prospective visitors, residents and stakeholders see their place/role in our destination
 - Local-centric storytelling showcasing people, places and products that are uniquely Thurston County
- Increase brand impact by updating Community Co-Brands—refresh typography, expand color palettes, and usage support
- Consider stakeholder partnerships to generate authentic website content (guest blogs) to be featured in their section of experienceolympia.com, and to be shared via social media and opt-in communications (e-newsletters)
- Increase Community Guides/Byway Map/Visitor Guide exposure by expanding local distribution channels:
 - Coffee shops
 - ° Salons
 - Medical facilities
 - ° Car dealerships
 - ° Real Estate agencies
- Investigate alternate out-of-area distribution system for Community Guides/Byway Map/Visitor Guide
- Investigate cooperative distribution models partnering with community peers who also produce visitor-centric guides and tools

Continue build-out of content and communications to support key brand messages and image through a vertically-integrated systems approach. Integrate three campaigns to work hand in hand to put our commitment to DEI into action, highlight those attributes that truly characterize our destination—our people and their legacy—and visually convey the power of hospitality in Thurston County.

· You Belong Here

 Invites individuals within all verticals to recognize themselves in our region, know that they are welcome, valued, and play an important role in our destination.

• Made in Thurston County

- Local-centric storytelling showcasing people, places and products that are uniquely Thurston County. Key Attributes/Sectors align with our web user affinity categories:
 - Food, dining, bars, nightlife
 - Unique shopping
 - · Book lovers
 - Outdoor escapes
 - Sports & wellness
 - Arts & culture

The Power of Hospitality

 Campaign targeting residents and stakeholders, educating them about the value of our industry, its impact on the lives of locals and guests.

Disperse all through each channel:

- · Image library development
- Video storytelling (video shorts)
- Blog development
- Itinerary/packaged travel/tours
- Opt-in communications (e-newsletters)
- Social media
- P.R. pitch sheet & press release inclusion
- Print advertising in key publications (Scenic WA, etc.)
- Digital programmatic display targeting highest value markets including those with highest concentrations, likely overall volume, overnight leisure travelers, meeting planners, event organizers, and sports event attendees/spectators
- Digital programmatic display targeting locals in-market as well as visitors inmarket for meetings and sports events seeking to disperse guests to activities and attractions throughout the county; also potential retargeting for future visitation with extended stay growth opportunity
- Digital advertising in local online resources educating and connecting with locals
- Products: Visitor Guide, Community Guides, Byway Map

Deepen, enhance, and expand content including:

- Website content on the <u>travel professionals</u>, <u>meeting planner services</u>, <u>sports commission</u> and <u>film commission</u> pages
- New opt-in email communications to meeting planners, tour planners, sports event organizers, travel professionals, and residents looking for things to do and places to connect
- Printed Thurston County Things to Do Map



Build trust and deepen relationships with stakeholders and locals through:

- Increased staff outreach and community and industry participation
- Annual Meeting
- Sports Awards
- In-person board meetings
- Certified Tourism Ambassador (CTA) program

2. Increase Economic Impact

- Maintain visitation levels: GenX/Boomers
- Grow visitation levels: Millennials
- Grow relationships/cultivate future travelers: GenZ
- Develop new relationships/nurture existing relationships with organizations, services, and systems that will support sales
 efforts
- Continue and increase support to direct sales efforts
 - Host FAM tours
 - Attend outbound sales missions
 - Attend trade shows
 - Site inspections
- Increase overall visitation to Thurston County through balanced targeting (seek visitation volume from proximity markets and multi-day growth from high-value markets further away)
- Extend overnight stays through balanced targeting and development of multi-day itineraries and packaged travel experiences
- Increase visitors' overall spend while in-market by providing a multitude of options for engaging with the destination in a variety of ways over time
- Increase visitors' overall spend while in-market by leveraging local expertise and influence: leverage residents and stakeholders as key influencers
- Increase paid occupancy during need periods: midweek visitation, Q2 & Q4
- Increase EOB's capacity through increased and diversified funding support

3. Enhance the Destination Experience

Visitors

- Improve the destination experience by identifying shared challenges and shared solutions derived through cooperation and alignment with fellow organizations and municipalities within the region
 - ° Continue to engage Destination Management Taskforce
 - Hold quarterly listening sessions with stakeholders to better understand our region's needs and pain points, and to determine their openness to collaborate on solutions
 - Hold quarterly Regional Roundtable—informal meetings of organizations impacted by or impacting tourism within Thurston and Lewis Counties to share current programs, and opportunities to collaborate
- Create free opportunities to connect with locals and guests. Engage CTAs to host and lead seasonal guided tours linked to interest-based itineraries
- Leverage resident and stakeholder influence on visitors: inspire positive messaging, make planning tools more accessible, and educate locals about the power of tourism

Meeting & Sports Event Planners and Meeting, Event & Tour Attendees

- Provide conference and event services that would include offsite pre/post bookings and VIP amenities
- Provide information about our destination (welcome packets, booth, concierge services, etc.)

X. Content Strategy

Content strategy will be guided by a combination of what we know about our audiences—what their needs and preferences are—and a scope of work that supports our stakeholders and locals who are also working to support the quality of the destination experience through events, festivals, and cultural activities.

Content will be created centralizing around our three campaigns...

- You Belong Here
- Made in Thurston County
- The Power of Hospitality

...to speak to our audiences' top affinity categories...

- Food, dining, bars, nightlife
- Unique shopping
- Book lovers
- Outdoor escapes
- Sports & wellness
- Arts & culture

...shared through a consistent hierarchy of channels. (See Strategies & Tactics)...

...developed and shared in keeping with tiered packages identified and allocated for our region's municipal lodging tax award recipients.



XI. Pricing Strategy

Experience Olympia & Beyond is no longer a membership-based organization, which allows our team to most accurately market and sell our destination without the constraints of only promoting those who pay a fee. That said, we do offer opportunities for tourism-related businesses and organizations to expand and enhance their presence through our scope of work. We employ a value-based pricing approach, seeking to cover organizational expenses while also acknowledging the value of the service provided.

Services/products that Thurston County tourism-related businesses and organization can purchase from EOB to broaden their exposure include:

- Custom Campaign Kit website content creation and social media promotion
- Destination Signals website advertising
- Visitor Guide advertising
- Community Cornerstone Sponsorships
- Annual Meeting Sponsorships
- Sports Awards Sponsorships

Services/products will be sold a la carte and via discounted packaging. Packaged sales will integrate all opportunities excluding Destination Signals and will integrate CTA training.

XII. Vertical Analysis: Independent Leisure Travelers



Strengths & Opportunities

- 64.6% of potential visitors are familiar with Thurston County as a place to visit (although 49.1% are only somewhat familiar opportunity to increase brand awareness)
- When asked to describe Thurston County as a destination in one word, most potential visitors positively described the area with beautiful, diverse, nature and outdoors being top mentioned words
- Most overnight visitors are staying in hotels/motels
- Disperse visitation to Rainier, Grand Mound, Tenino, Yelm, Rochester and Bucoda
- Attract more first-time visitors to Thurston County
- Create itineraries for those visiting friends/relatives
- Diversify reasons to visit Thurston County (vacation, weekend getaway, business, sports, group, and those traveling through)
- · Increase overnight trips to the county by providing more information about things to see and do
- Advertise to markets further away to increase overnight stays
- Visitors have a positive overall perception of Thurston County
- 82.4% of visitors are repeat visitors
- Visiting friends/family is main reason visitors came to Thurston County
- In general, visitors have a positive experience compared to residents' perceptions of visitor experiences
- · Opportunity to better represent the underrepresented in our destination marketing
- Opportunity to reach new market segments by expanding to other social media platforms (Youtube, TikTok, Pinterest)
- Road trips are still the top transportation preference among independent leisure travelers
- Even with looming economic concerns, travel excitement remains high, and consumers are open to learning about travel experiences/destinations

(Source: EOB Consumer Sentiment Survey - Nov 2022)

Weaknesses & Threats

- · Most visitors go to Olympia, Lacey, or Tumwater with many missing other communities in the county
- 82.4% of visitors are repeat visitors
- Most visitors come to Thurston County during the summer months
- Visiting friends/family is main reason visitors came to Thurston County
- 47.4% of visitors just spent a day in the County
- 14.3% stay in Airbnb/Vrbo and 25.7% are staying with Friends/Relatives
- 56.5% of visitors who only stay the day say learning more about things to see and do could influence them to stay

- overnight. However, 35.5% of day visitors have no interest in staying the night mostly because they live close by
- Loss of market share/decreased occupancy due to transportation costs
- Loss of market share/decreased occupancy due to perceived potential financial concerns/ economic downturn
- Visiting for vacation or weekend getaway rank lower than visiting friend/family as reason visitors came to Thurston County which could hurt overnight stays
- Transportation services, accommodations with limited services, resort hotels, and adequate venue and sports locations rated lowest amongst visitors
- Homelessness and parking were rated as areas needing most improvement in Thurston County by visitors
- Not enough diverse consumers are represented in current destination marketing
- Overall prospective visitors are concerned about personal safety while traveling.
 Concern is higher amongst younger generations, diverse groups, those living in the west and south US regions, and living in larger cities
- Prospective visitors have concerns about potential further slowing of the economy and concerns about their personal finances, transportation costs, and inflation, which impact decisions about travel spending
- Competition Cities with more developed product (attractions, meeting facilities, resort hotels, etc.), DMOs with larger budgets to advertise

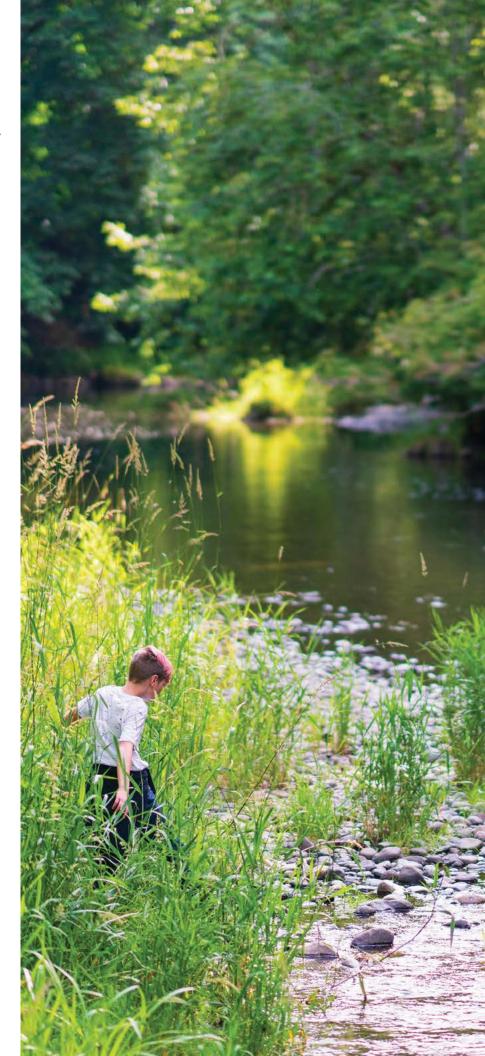
(Source: EOB Consumer Sentiment Survey – Nov 2022, Destination Analysts SATS)

Trends

- Finding Familiarity-visited before and want to return
- 2. Away from the crowds-seeking atmosphere, space, exploration, discovery
- 3. Visiting Friends & Relatives (VFR)
- 4. Food & Cuisine
- 5. Access to Water
- 6. Adventure
- 7. Connecting with nature
- 8. Shopping
- 9. Arts & Culture
- 10. History

(Source: Forbes Travel Trends Report 2023 pt. 1; Destination Analysts Report SATS)

Target Audiences: see Audiences Defined— Leisure Travelers.





Group Leisure/Tour & Travel

Strengths & Opportunities

- Thurston County is an attractive destination with strengths in our close proximity to water, cultural and historical assets
- The Pacific Northwest is a priority for domestic group tour operators and Thurston County can book into itineraries that are already available. Can grow this long-haul domestic group segment
- Opportunity to address the knowledge gap in Foreign Independent Travel (FIT)
- Opportunity to create and distribute preset packages/itineraries due to our close proximity to SeaTac/PDX, National Parks and Canada

(Source: NTA, EOB)

Weaknesses & Threats

- More difficult to sell because Thurston County is a suburban destination
- Lacking adequate venue space only one property with over 150 rooms
- Loss of market share/decreased occupancy due to transportation costs
- Loss of market share due to prospective financial concerns/economic downturn
- Very little FIT inventory/lack of knowledge to capture this business
- Inventory comprised of only franchise properties

(Source: EOB)

Trends

- Seeking out companies and experiences that focus on "benefitting local people and the economy" and "preserving natural and cultural heritage"
- Will splurge on value-added services like a travel advisor. Even Millennials and Gen Zers are turning to travel advisors
- Off-Season travel is gaining steam
- Off-grid travel
- Nostalgic travels and experiences
- Budget friendly trips and experiences

(Source: Virtuoso reveals top travel trends for 2023 – Forbes, Travel and Tourism Trends for 2023 - Bokun)

Target Audiences: see Audiences Defined— Group Leisure/Tour & Travel.





Groups/Meetings

Strengths & Opportunities

- Travelers want to combine business and leisure, with a focus on learning about the uniqueness of a destination and bringing their families
- Site visits/FAMS, incentive packages, staff to assist planners, RFP distribution and digital marketing materials to meeting planners
- Important to meeting destination selection: meeting facilities, hotel quality, hotel rates and overall cost of meeting
- Opportunity to focus on regional meetings as airfare is on the rise (In 2022, 48% higher than last year)
- Strong positive sentiment amongst leisure travelers making Thurston County a perfect location for group/meeting travelers to extend their stay
- Leisure visitors have a positive perception of Thurston County which presents an opportunity to share all the great things to see and do with the groups/meetings segment

(Source: Skift Travel Trends, Destination Analysts – The CVB and Future of Meetings Industry Report Winter 2021, GBTA/CWT 2023 Global Business Travel Forecast)

Weaknesses & Threats

- Loss of market share/decreased occupancy due to transportation costs
- Loss of market share due to prospective financial concerns/economic downturn
- In terms of meeting the needs of visitors, accommodations with full conference services, variety of event and conferences being held, adequate services providers to support these venues, and adequate locations of both event and conferences rated lower than other tourism products evaluated in the county
- Event costs are skyrocketing across the US (25% higher than 2019, 7% higher than last year)

(Source: Nov 2022 - Destination Analysts SATS, EOB 2022 Sentiment Study, GBTA/CWT 2023 Global Business Travel Forecast)

Trends

- 1. Combining business and leisure travel and there is a great interest in learning about a destination's unique offerings
- 2. Bringing their families with them
- 3. Amenities that allow them to focus on their physical and mental wellbeing
- 4. Meeting facilities, hotel quality and rates and overall cost of holding meeting in a destination are most important attributes when selecting a destination to hold a meeting
- 5. Site visits/FAMS are the most valuable resource a CVB can offer

(Source: The Corporate Travel Trends Hospitality Brands Can't Ignore in 2023 - Skift, Destination Analysts CVB and Future of Meetings Industry Report 2021)

Target Audiences: see Audiences Defined— Groups/Meetings.

Sports



Strengths & Opportunities

- Sports venue bookings are experiencing a high rate of success (especially in the Baseball/Fastpitch segment)
- Youth and Adult Amateur are the most represented event types in the US, aligning with events typically hosted in Thurston County
- Opportunity to work with partners to further understand our capacity and availability to host sports events in Thurston County
- · Opportunity to educate athletes/spectators with the goal to extend length of stay or visit again in the future

(Source: EOB, Sports ETA)

Weaknesses & Threats

- Loss of market share/decreased occupancy due to transportation costs
- Loss of market share due to prospective financial concerns/economic downturn
- Lacking information about our destination that we can make available to sports planners
- Local events are prioritized making it difficult to book certain venues

(Source: EOB, Destination Analysts SATS)

Trends

- Sports tourism has improved since COVID but still lagging behind 2019
- Nearly all destinations hosted youth events in 2021
- 3. Youth and Adult Amateur are the most represented event types in the US, aligning with events typically hosted in Thurston County
- Over 60 percent of destinations paid bid fees in 2021 and based this on these factors: economic impact, room nights, exposure, repeat business and community legacy
- 5. Trend in creating ancillary events for attendees to go to while in the destination (like a race, fashion show, local eco-tours, adopt a team). This can have increased ROI for ancillary operations like merchandising, concessions, food trucks, pop up stores, photo booths and other etc.

(Source: Sports ETA, Sportsdestinations.com)

Target Audiences: see Audiences Defined— Sports.





Residential

Strengths & Opportunities

- 72.6% of residents have heard of EOB and large share know that EOB promotes tourism
- Majority of resident respondents know that EOB is responsible for tourism promotion
- · Strong sentiment towards tourism in: Tourism helps local small business, festivals and events bring visitors
- Better align resident sentiment with stakeholder and visitor sentiment: Thurston County provides a welcoming, fun, respectful, positive experience that is easy to navigate

(Source: EOB 2022 Sentiment Study)

Weaknesses & Threats

- Strong sentiment towards tourism in: Homelessness negatively affect tourism
- In general, residents perceive the visitor experience more negatively in the areas of homelessness, public parking and public transportation
- Unique shops were not rated highly by residents as things Thurston County has that can't be found anywhere else
- Thurston County is perceived to mostly lack public parking, restaurants and music
- Top issues amongst residents and stakeholders: homelessness, political, economy, housing and lack of services

(Source: EOB 2022 Sentiment Study)

Target Audiences: see Audiences Defined—Residential.

Stakeholders/Organizational



Strengths & Opportunities

- 97.7% of stakeholders are familiar with EOB and have a strong partnership with EOB
- When asked to describe Thurston County as a destination in one word, most stakeholders positively described the area with beautiful, diverse, nature and outdoors being top mentioned words
- Most stakeholders believe that taxes generated by visitors support the development of amenities, and that tourism helps local small business; taxes generated by visitors support jobs that residents need
- In general, stakeholders have a more positive perception of the visitor experience in Thurston County compared to residents' perceptions
- Stakeholders used the words "Capitol" and "Beauty" to indicate things that Thurston County has that can't be found anywhere else
- Stakeholders believe that Thurston County's greatest assets can be described as "beautiful", "community/people",
 "waterfront", "nature", "parks", "uniqueness", "lakes", "access", and individual cities
- EOB is led by a healthy mix of veteran and new Board members

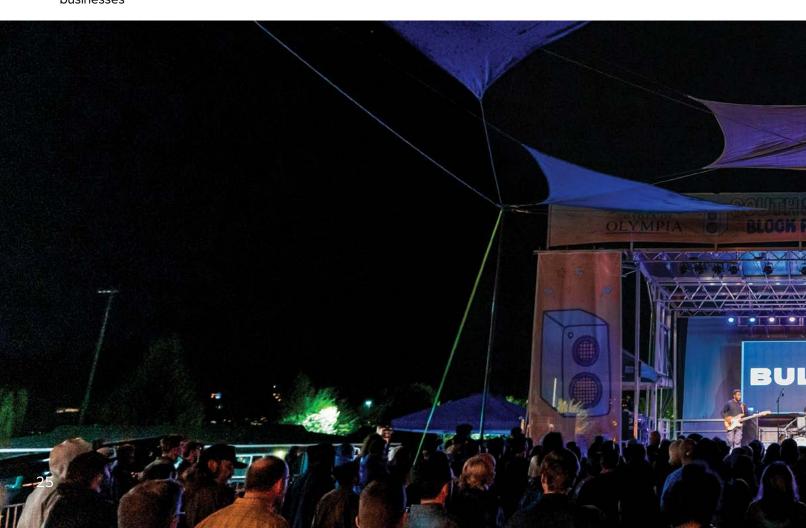
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- The EOB Board has balanced representation from throughout Thurston County and its communities
- The EOB Board has a balance of skills and tourism experience represented
- EOB staff has a balance of veteran and new team members
- EOB received renewed DMAP accreditation, an industry leading designation
- EOB has a healthy reserve fund to protect the organization as the tourism industry continues to recover from effects related to the COVID-19 pandemic
- CEO is undergoing CDME certification, bringing the latest in tourism industry best practices to the organization
- Staff is attending professional development opportunities throughout the year, bringing the latest best practices in their respective areas of operation back to the organization and community
- Opportunity to provide further education to the Board about the tourism industry, its role in the community and how it impacts economic and community development
- Opportunity to partner more directly with community partners and work collaboratively to improve the destination experience both for locals (including stakeholders) and visitors—Destination Management Taskforce
- Opportunity to diversify revenue streams to fund organizational objectives
- · Opportunity to develop new products to serve wider representation of community partners
- New lodging properties are being built and will open in 2023, providing new lodging options for guests, and offsetting inventory losses from homeless mitigation, extended stays, and renovations
- · Thurston County predominantly has franchised lodging properties offering reliability and affordable rates

(Source: EOB Consumer Sentiment Survey - Nov 2022)

Weaknesses & Threats

- Weak sentiment toward local dining options
- Perceive the visitor experience more negatively in the areas of homelessness, public parking, and public transportation
- Believe the following local amenities are not our strongest offerings: transportation services, accommodations with limited services, resort hotels, event venues and sports locations
- Perceive a lack of available experiences and tours for visitors
- Believe that customer complaints mainly center around homelessness, traffic, parking and hours of operation for businesses



- Concerns include homelessness, political, economy, housing and lack of local services
- Economic Factors Secondary research showing a slowing of the economy (concerns about personal finances, transportation costs, inflation which plays into decisions about travel spending)
- Opportunity for more diversity on the EOB Board (lack of diversity of age is of particular note)
- Opportunity for more engagement
- Because of the terms included in EOB bylaws, few Board members qualify to be elected to the Executive Committee
- EOB is still understaffed compared to pre-COVID, stretching staff and organizational capacity
- EOB revenue is funded in large proportion by public funds tied to travel—when global issues beyond our control occur that impact travel, significant fiscal implications are unavoidable
- Local lodging properties are being used as a temporary solution for homelessness (in most cases, rooms are being used, but in a couple cases, entire properties are being adapted as homeless shelters). This negatively impacts the visitor experience, takes rooms out of available tourism lodging inventory, and negatively impacts EOB staff ability to accurately forecast TPA collections which fund EOB operations
- Local lodging properties have seen increased tax exempt usage, taking rooms out of available lodging inventory, negatively impacting EOB staff ability to accurately forecast TPA collections which fund EOB operations
- Communications with local lodging properties need to improve in 2023 to better understand when significant renovations are taking place at properties resulting in room blocks taken out of inventory for months at a time—less rooms translated into less revenue in 2022
- Thurston County predominantly has franchised lodging properties—this excludes the needs of luxury travelers looking for a unique resort experience
- Thurston County only has two privately owned and operated Bed & Breakfasts
- The COVID-19 pandemic impacts tourism and hospitality industry revenue and workforce. Thurston County has
 also seen an increase in usage of hotel/motel rooms for tax exempt purposes, including those based on long term
 usage—30+ day stays

(Source: EOB Consumer Sentiment Survey - Nov 2022)

Target Audiences: see Audiences Defined—Stakeholders and Organizational.

