

October 19, 2016

Dear Stakeholder:

Thank you for taking the time to provide input on the City of Bellevue and Visit Bellevue Washington Destination Development Plan. Attached you will find the DRAFT Destination Development Plan Conceptual Framework dated October 19, 2016.

The development of a Destination Development Plan began in July of 2014 when the City of Bellevue established their new Economic Development plan. Part of that plan identified strengthening Bellevue's Tourism and Visitor Cluster as a strategy to enhance and increase the city's economic base, create job opportunities and strengthen the city's economic resiliency. They identified Visit Bellevue Washington as a community partner to assist them in furthering this work.

In January 2016 a tourism stakeholder group was convened to identify a consultant to help in the development of a Destination Development Plan. The group selected Resonance Consultancy out of Vancouver BC. Phase 1 of this work has given the project team an opportunity to review and understand the history, current results, future plans and target markets of Bellevue tourism within the context of the broader economy, economic development and quality of life. Based on this information, Resonance Consultancy has drafted the Conceptual Framework and proposed strategies based on a detailed examination of Bellevue's characteristics, visitors, profile and market prospects. The findings of the final Conceptual Framework and strategies will be briefed to Bellevue City Council in December. It is anticipated that Phase 2 of the Destination Development Plan will begin in Q2 of 2017 and will include an implementation plan to support the strategies in the Conceptual Framework.

Our work has just begun and your input is very important in assisting us to create a plan that will serve Bellevue long into the future.

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# CITY OF BELLEVUE AND VISIT BELLEVUE WASHINGTON DESTINATION DEVELOPMENT PLAN - CONCEPTUAL FRAMEWORK DRAFT

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RESONANCE 

October 27, 2016



# INTRODUCTION

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The following document sets forth Resonance Consultancy's summary of travel and tourism related issues and opportunities for Bellevue Washington to be explored, discussed, debated and prioritized in the development of a Destination Development Plan.

This Conceptual Framework document focuses attention on the Status Check and Competitive Benchmarking phases of the Destination Development Plan, and serves as a benchmark for later phases of Competitive Identity, Neighborhoods and Infrastructure, Icon Concept, Programming and Implementation and Financing.

This phase of the Destination Development Plan has given the project team an opportunity to review and understand the history, current results, future plans and target market of Bellevue tourism within the context of the broader economy, economic development and quality of life, and to embark on a detailed examination of its characteristics, visitors, profile and market prospects.

The Situational Analysis was the first step in this effort. To produce it, we have interviewed some 60+ destination stakeholders to understand their issues and opportunities; surveyed 310 visitors, 441 residents (live or work in Bellevue) and 130 others to understand their perspective on Bellevue as a place to visit and how it compares to the competitive set; and dove-deep into all types of secondary research.

Specifically, as the first deliverable of this Destination Development Plan, the full Situational Analysis included:

Status Report of Bellevue's tourism & visitor sector results, tourism assets, visitor satisfaction, tourism organization/operations and research capacity including:

- Overview of tourism in Bellevue.
- Review and assess City of Bellevue and Visit Bellevue Washington policies, strategies, plans, organizations, budgets and operations associated with Travel & Tourism.
- Tourism Asset Mapping for Bellevue and a keyword analysis from consumer reviews.
- Survey of Bellevue hotels to estimate business / leisure split.
- Stakeholder engagement sessions to understand the key issues and opportunities for Bellevue tourism.
- Bellevue destination survey to assess levels of satisfaction and produce a market segmentation analysis to profile the characteristics of the Bellevue visitor.

Competitive Analysis of Bellevue's tourism products and services vis-à-vis its competitive set with detailed information on KPIs (Key Performance Indices), issues, opportunities and best-case practices including:

- Destination Assessment Report for Bellevue and its competitive set.
- Literature search on each of the competitive set to find challenges, successes, best practice and performance metrics.
- Review of publicly available destination comparison research.

The results and information from the first deliverable will be used to gain broad input and priorities on tourism opportunities and challenges.

# CONCEPTUAL FRAMEWORK

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The following Conceptual Framework has been drawn from the individual pieces and collective body of research conducted for this Situational Analysis and suggests a number of emergent findings and potential directions with respect to a destination development strategy for the City of Bellevue. The conclusions have not been prioritized, but have been grouped into 7 general themes around which the Destination Development Strategy could be organized.

## Infrastructure Development / Hardware / Physical Assets

- Downtown, Bel-Red, Factoria and Spring District
- Grand Connection
- Mass Transit / Light Rail
- MC Headquarter Hotel
- Meydenbauer Center
- Sports / Events Arena

## Market Segments / Visitor Groups

- Active Adventurers and Infrequent Convenience Travelers
- Adult vs. Family Destination
- Bleisure Travel
- Business Travel
- Day Trip Destination
- Leisure Weekends / Weekend Getaway
- Repeat Visitors
- Upscale

## Visitor Activities / Product Development Opportunities

- Biking
- Culinary, Restaurants and Wine
- Culture
- Culture, Performing Arts, Live Music and Shows
- Local, Unique, Authentic
- Nightlife
- Outdoor Activities / Recreation
- Signature Event (Snowflake Lane)
- Waterfront Access and Activities

## Destination Operations

- Cleanliness, Safety / Security and Walkability
- Congested, Heavy Traffic and Construction
- Parking

## Regionalism

- Proximity to Seattle
- Regional Home Base
- Regional Tourism Cooperation

## Destination Differentiators

- Bellevue Hotels
- Brand
- Diversity
- Shopping, Restaurants and Hotels
- Technology / Virtual Reality / Gaming

## Professionalizing the DMO

- Events and Festivals
- Packages, Deals and Discounts
- Portland Model
- Tourism Marketing and Promotion Budget
- Visitor Information Center

## Active Adventurers and Infrequent Convenience Travelers

The Bellevue destination Survey identified “Active Adventurers” and “Infrequent Convenience Travelers” as the main visitor segments and largest segments of residents in Bellevue. The destination development strategy should focus attention on creating hardware, software and programming for Active Adventurers who show great interest in engaging with nature and participating in outdoor activities, sports and parks, as well as Infrequent Convenience Travelers who tend to be overwhelmingly female with lower net worth, take fewer and shorter trips, and tend to stay close to home.

## Adult vs. Family Destination

Bellevue is not considered a “family destination” as a result of limited child-friendly activities. The destination development strategy should either embrace Bellevue as an “adult destination” focusing its resources to build on that characteristic, or alternatively, significantly broaden Bellevue’s child-friendly product offerings to encourage the family market segment.

## Bellevue Hotels

69% of Bellevue hotels are rated as quality establishments, which is an excellent performance measurement. The destination development strategy should make sure that Bellevue maintains its excellent hotel performance and continues to deliver quality accommodation for its overnight visitors.

## Biking

The development of new bike paths, infrastructure and bike share will have an important impact on Bellevue as a place for residents and visitors to ride. The destination development strategy should embrace these efforts to make Bellevue an important destination for riders and other activities that co-exist with biking.

## Bleisure Travel

Half of all business travelers to Bellevue extend their visits for pleasure (shopping, sightseeing and dining). The destination development strategy should focus resources to encourage and facilitate this trend toward Bleisure.

## Brand

Although Bellevue is well known for its high-end shopping, its large concentration of tech companies, rich ethnic diversity of residents and excellent safety / security, it does not have a strong, unique or distinguishing brand identity to differentiate it from other high-quality destinations. The destination development strategy should focus resources to identify, create and communicate a strong unique brand identity for Bellevue.

## Business Travel

The vast majority of Bellevue overnight stays are associated with business travel and the MICE (Meetings, Incentives, Convention and Exhibitions) segment. The destination development strategy should focus resources and attention to serving this particularly important segment.

## Cleanliness, Safety / Security and Walkability

The fundamental character of Bellevue as a clean, safe / secure and walkable destination must be preserved and employed as important elements of the destination development strategy.

## Congested, Heavy Traffic and Construction

Bellevue has earned a negative reputation as unfriendly to drivers as a result of ongoing construction and road closures. The destination development strategy must address the situation and provide solutions to change this reputation / reality.

## Culinary, Restaurants and Wine

Bellevue is not particularly known as a culinary capital, yet a large portion of its visitors suggest that Bellevue's restaurants are one of the key reasons they visit the destination. Bellevue is also conveniently located nearby and serves as home base for visitors to the wineries and tasting rooms of Woodinville. The destination development strategy should embrace culinary (restaurants, chefs, events, experiences) and wine tourism as an important focus of its plan and protect, build and develop Bellevue as an important culinary and wine destination.

## Culture

Bellevue is definitely not able to compete with Seattle for cultural activities or performances, but residents and visitors alike have suggested that they might engage in these activities more often in Bellevue if they were offered so as to avoid the traffic, congestion and inconvenience of commuting to Seattle. The destination development strategy should include culture within its focus, but be careful not to put too much weight behind this category of tourism assets.

## Culture, Performing Arts, Live Music and Shows

Visitors have indicated that they would definitely like to see more live music and shows in Bellevue, and have told us that Bellevue does not do very well in terms of Culture and Performing Arts. In this regard, The Tateuchi Center - a 2,000-seat concert hall that is proposed for downtown Bellevue – which is currently in the process of raising funds for development, might serve to address these opportunities and limitations. The destination development strategy should focus resources and time to explore the opportunity presented by the proposed Tateuchi Center as well as other arts organizations and private establishments for building Bellevue's culture, performing arts, live music and shows.

## Day Trip Destination

One of Bellevue's key strengths is that it is an excellent day trip destination especially for shopping and dining. The destination development strategy should market to, capitalize on and facilitate the extremely important day trip market segment.

## Diversity

Bellevue's development as a high tech corporate headquarters city has resulted in a culturally diverse population of residents and workforce that is rare and unique to the Greater Seattle Area, Washington State and the United States. In fact, few other places can claim the ethnic diversity of people that live and work in Bellevue. The destination development strategy needs to explore and incorporate the ethnic and cultural diversity of Bellevue as a key tourism asset and make it an important element of the strategy.

## Downtown, Bel-Red, Factoria and Spring District

Although Downtown currently delivers the largest number of quality tourism experiences, Bel-Red and Factoria are showing significant signs of activity that are enjoyed and appreciated by visitors. The destination development strategy should put more focus on Bel-Red and Factoria as growing areas for tourism activity development. The focus should also include potential tourism opportunities in the Spring District.

## Events and Festivals

Several organizations including the Bellevue Downtown Association and the Bellevue Special Events Committee are involved in the development and hosting of important events and festivals that add richness, vitality and economic contribution to the city. However these efforts tend to be individualistic, isolated and do not necessarily deliver the full potential to residents and visitors. Visitors have also suggested that they would return more often for new / more events and festivals. The destination development strategy should focus attention on creating, incubating, developing and facilitating Bellevue events and festivals, which could make a significant contribution to Bellevue's quality of life and economic impact of new / additional visitors.



## Grand Connection

If realized, the Grand Connection could be “a unique and defining urban experience that would create new opportunities in public space, connectivity, and placemaking while advancing the arts, recreation, and social engagement” for Bellevue. The destination development strategy should embrace the Grand Connection as one of its primary and critical infrastructure components and cooperate to develop and program the Grand Connection for the benefit of residents and visitors.

## Leisure Weekends / Weekend Getaway

The largest opportunity for developing Bellevue tourism is building leisure tourism on the weekends. The destination development strategy should focus resources and effort on building weekend visitor opportunities.

## Local, Unique, Authentic

Bellevue’s character is a product of its development period (post 1960’s) and as a result possesses very few unique neighborhoods and establishments that create character and personality for the city. However, these local, unique and authentic places are what visitors seek out when they are selecting or visiting a destination. The destination development strategy must encourage and create opportunities for local, unique and authentic establishments (restaurants, shops, hotels, attractions and activities) that will help differentiate and separate Bellevue from its tourism competition.

## Mass Transit / Light Rail

Although a large percentage of visitors arrive to Bellevue by automobile (83.4%), a large number of visitors are interested in using mass transit / light rail during their visit for travel around town or nearby destinations / activities. The destination development strategy should explore the mass transportation issues and opportunities for Bellevue visitors.

## MC Headquarter Hotel

In many destinations, the availability and proximity of a “headquarter” hotel to its Convention Center is a real asset that helps to sell meetings and convention business. The destination development strategy must explore the potential for and feasibility of a MC Headquarter Hotel.

## Meydenbauer Center

A number of existing conferences and events, previously held in Bellevue, have grown too large for the Meydenbauer Center and have been forced to look to other destinations that can accommodate their meetings and events. The Meydenbauer Center has also turned away meetings and conferences that it was not able to accommodate. The destination development strategy should explore the potential and feasibility of an expanded Meydenbauer Center.

## Nightlife

Only 36% of Bellevue’s nightlife establishments are rated as “quality” places for nightlife, while more than 55% of shopping is rated as “quality” shopping. The destination development strategy should target the improvement of Bellevue nightlife to deliver evening activities that compare favorably in number and quality to its daytime activities.

## Outdoor Activities / Recreation

Bellevue is not considered an important outdoor activity / recreation destination. The destination development strategy should embrace Bellevue as an “indoor destination” and focus its resources to build on that characteristic, or it must broaden Bellevue’s product offering of outdoor activities to encourage the outdoor visitor market segment.

## Packages, Deals and Discounts

Visitors have said that they would return more often to Bellevue if offered packages, deals and / or discounts, which is true for almost any destination on the planet. The destination development strategy should consider opportunities for combining accommodations, meals and activities at special rates, packages or promotions that might encourage repeat or spontaneous visitation to Bellevue especially for need periods.

## Parking

The difficulty and price of parking has been repeatedly identified in the Situational Analysis as one of Bellevue visitors' top negatives. The destination development strategy must address the parking situation with definitive research, recommendations and plans to eliminate this issue no matter its reality or perception.

## Portland Model

Portland, OR seems to embody many best practice principles encouraged of a Destination Marketing Organization with intelligent strategies, plans, programs and budget. The destination development strategy should use Portland's experience as an important case study for Bellevue to enhance and develop its tourism development and marketing organization, strategy and operations.

## Proximity to Seattle

The proximity to Seattle, which will only be improved with future light rail options, is a key strength for Bellevue and should be a major element of its destination development strategy.

## Regional Home Base

Bellevue serves as home base for a number of regional day trip destinations such as Seattle, Kirkland, Woodinville, etc. and as a result should focus its destination development strategy on those aspects of home basing (hotels, restaurants, shopping, nightlife and highway/road access) that help to facilitate this role.

## Regional Tourism Cooperation

A number of regional tourism authorities / officials including Bellevue, Seattle, Kirkland, Woodinville, Bothell and others have suggested that a permanent / standing regional tourism committee, council or organization would greatly benefit the individual destinations and provide significantly greater cooperative programs and efforts on both the product development side and the marketing promotion side. The destination development strategy should explore the opportunities, benefits, limitations and costs associated with creating a regional tourism organization.

## Repeat Visitors

Repeat visitation to Bellevue is extremely high, so the destination development strategy must ensure that visitors love their visit each and every time, and promote new activities / events / attractions to try, explore and enjoy.

## Shopping, Restaurants and Hotels

The most important factors for visitors coming to Bellevue are shopping, restaurants and hotels. These elements must be first and foremost in developing a destination development strategy for Bellevue.

## Signature Event (Snowflake Lane)

The Bellevue Collection is the presenter of Snowflake Lane, which has successfully amused and entertained residents and visitors of Bellevue for years. Without a doubt, it has been identified as a premier event for Bellevue. The destination development strategy should explore additional growth and promotion of Snowflake Lane as a Signature Event opportunity to help put Bellevue on the national / international map for visitors.

## Sports / Events Arena

Although visitors are not currently coming to Bellevue for spectator sports, the Seattle region is currently lacking an NBA and NHL team, which have the potential to generate significant attraction for out-of-town visitors. A Bellevue sports arena could also serve as additional space for MICE (Meetings, Incentives, Convention and Exhibitions) events and serve to attract major performing artists, especially on important weekend nights, which would be positive for downtown hotels. The destination development strategy should explore the potential and feasibility of developing a sport / events arena in Bellevue.

## Technology / Virtual Reality / Gaming

Bellevue's strengths in Technology, VR and Gaming are a unique asset that should be factored into the destination development strategy especially as it relates to existing and potential events and hardware that showcase the region's assets. Specifically, the destination development strategy should explore the potential for and feasibility of an "Innovation Center" and / or "South by Southwest (SXSW)" type event that showcases Bellevue's high tech companies and products.

## Tourism Marketing and Promotion Budget

Visit Bellevue Washington (VBW), which focuses on the leisure side of tourism in Bellevue, operates as a subsidiary of the Meydenbauer Center, which is funded by a city hotel tax. The budget allocated toward Visit Bellevue's marketing and promotion to leisure visitors is modest and is definitely insufficient to reach a broad audience of potential visitors necessary to build weekend hotel occupancy and spending. The destination development strategy should explore the opportunities, benefits, limitations and logistics of a permanent funding mechanism for VBW and even greater marketing and promotion of leisure opportunities to visitors and residents.

## Upscale

Bellevue is well known and generally perceived as an upscale, affluent and trendy urban shopping, restaurants and hotels destination. The destination development strategy should embrace this perception and continue to grow and deliver on this promise.

## Visitor Information Center

Nearly all visitors to Bellevue visit Downtown / West Bellevue (86.1%). The destination development strategy should explore the potential, benefits and costs associated with a Downtown visitor information center.

## Waterfront Access and Activities

For a city flanked on two sides by water, Bellevue has not taken sufficient advantage of its waterfront access and assets to the benefit of tourism or local residents who do not live on the water. The destination development strategy must capitalize on Bellevue's aquatic opportunities and deliver water and waterfront access and activities for future visitors and current residents.