DESTINATION DEVELOPMENT PLAN Conceptual Framework & Strategy Briefing

BOLLOVISIT WASHINGTON



Presentation to Bellevue City Council
December 5, 2016

Presenters:

- James Henderson, Economic Development Director, City of Bellevue
- Stacy Graven, Executive Director, Meydenbauer Center
- Sharon Linton, Marketing and Communication Manager, Visit Bellevue Washington

ECONOMIC DEVELOPMENT AND TOURISM

Direct Strategy #3: Strengthen Bellevue's

Tourism and Visitor Cluster

"...the City will work with partners to develop a coordinated tourism strategy encompassing business-related and leisure markets. This Strategy will increase the city's economic base, create job opportunities, and strengthen the city's economic resiliency."





Consultant Selection Process

Consultant:



Experience in developing destination and economic development strategies for cities nationally and internationally.

Selection Committee:



HEAVY

RESTAURANT

GROUP











Two-Step Work Plan

- Phase 1: Situational Analysis & Conceptual Framework Strategies (completed)
- Phase 2: Implementation Plan (complete by Summer 2017)



DESTINATION DEVELOPMENT PLAN

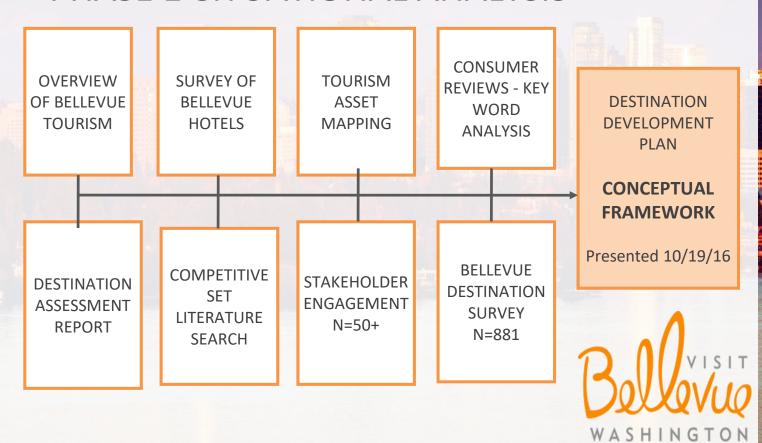
OBJECTIVES - PHASE 1

Development of the Situational Analysis

- Status check that provides an overview of the tourism and visitor sector in Bellevue
- Competitive benchmarking of Bellevue to similarly sized and situated peers
- Analysis of Bellevue's current competitive identity within the tourism and visitor sphere



PHASE 1-SITUATIONAL ANALYSIS





TOURISM ASSET MAPPING

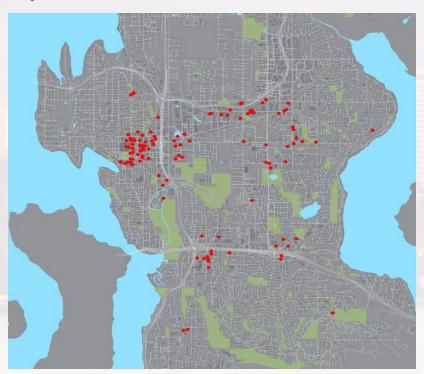
Mapped attractions and activities in Bellevue, WA, listed both on Trip Advisor and Yelp. We considered the total number of attractions and activities, quality attractions, as defined by users, including their popularity.

- CULINARY EXPERIENCES
 Restaurants, Food Experiences
- ENTERTAINMENT
 Shopping, Nightlife, Fun & Games, Amusement Parks, Zoos & Aquariums
- OUTDOOR ACTIVITIES
 Sports, Adventure, Boat Tours & Water Sports
- POINTS OF INTEREST
 Neighborhoods, Landmarks, Sights, Parks & Nature
- CULTURE
 Museums, Theatres & Concerts, Art & Cultural Events
- LODGING Hotels





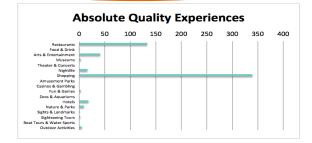
QUALITY CULINARY EXPERIENCES

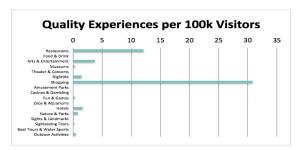






Bellevue	Absol	ute	Index	red
Category	Quality Experiences (QE)	Ranking of 15	QE per 100k Visitors	Ranking of 15
Restaurants	133	12	12.1	3
. Jou & DIIIK		15	0.1	12
CULINARY	134	12	12.2	4
A Estartainment	41	14	3.7	4
Museums	3	12	0.3	5
Theater & Concerts	0	15	0.0	15
CULTURE	44	14	4.0	5
муните		12	1.5	10
Shopping	339	7	30.8	1
Amusement Parks		9	0.0	9
Casinos & Gambling	0	3	0.0	3
Fun & Games	3	12	0.3	7
Zoos & Aquariums	0	8	0.0	8
ENTERTAINMENT	358	8	32.5	1
Hotels	18	11	1.6	1
LODGING	18	11	1.6	1
Nature & Parks	9	12	0.8	4
Sights & Landmarks	1	13	0.1	13
Sightseeing Tours	2	15	0.2	12
SIGHTSEEING	12	12	1.1	10
Boat Tours & Water Sports	0	12	0.0	12
Outdoor Activities	5	12	0.5	9
SPORTS & ADVENTURE	5	12	0.5	10
TOTAL	571	11	51.9	3
			·	





STAKEHOLDER ENGAGEMENT

Resonance Consultant - Richard Cutting-Miller 50+ stakeholders in individual and group sessions:

- Trends impacting the Bellevue tourism industry and threats and opportunities represent;
- Product development needs of Bellevue, its tourist attractions, services, facilities and transportation;
- Growth and expansion opportunities for Bellevue's tourism industry
- Tourism industry actions and activities that can benefit the local economy and social well-being
- Policies needed to direct governance, funding, planning and development in a manner that supports tourism development goals and objectives.

SWOT ANALYSIS

Strengths

Eastside / NW Washington Area Hub • Ethnic Diversity • High End Shopping • Safety and Security • Technology / Virtual Reality / Gaming Community

Weaknesses

Arts • Auto-Orientation • Brand Identity • City Zoning • Iconic Image • Local • Nightlife • Parking • Performing Arts • Restaurants • Sports

Opportunities

Bellevue Water Connection, Activation and Access • Biking Initiative/Bike Share • Eastside Rail Corridor • Events and Festival Strategy and Organization • Grand Connection • MC Headquarter Hotel • Proximity to Washington's Wine Country • Regional Tourism Cooperation • Signature Events (Snowflake Lane) • Signature Technology/Event • Sports/Events Arena • Spring District-Bel-Red • Tateuchi

Threats

Canadian Dollar Exchange • Meydenbauer Center Size • Tourism Marketing and Promotion Budget

BELLEVUE DESTINATION SURVEY

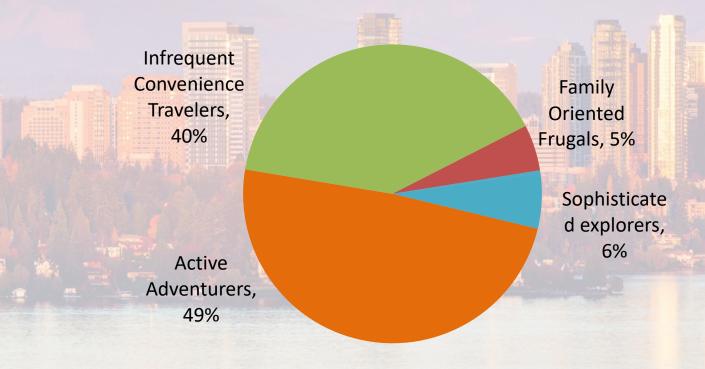
Online survey August 11 and August 29, 2016
Bellevue's past guests and current residents (live and or work in Bellevue).

• 881 Respondents-41% previous visitors, 59% live or work in Bellevue.

Objectives of the survey included:

- Understand who current Bellevue customer is, compare to US travelers, identify what types of travelers might be attracted in the future.
- Conduct a segmentation analysis of respondents to better understand the Bellevue visitor and residents and how they differ from U.S. and Canadian travelers in general.
- Assess quality and satisfaction with current destination services, accommodations and amenities, and suggestions for improvement.

VISITOR PSYCHOGRAPHIC SEGMENTS



Market Segments/Visitor Groups

- Active adventurers
- Infrequent convenience travelers
- Adult destination-or more family offerings
- Business travel and bleisure (business-leisure)
- Day trip destination shopping/dining
- Leisure/getaway weekends
- Repeat visitors



What aspects of your last visit did you find excellent, outstanding or like the most? N=183

Farmers Market Location Patio Seating Food Trucks July 4th Events Pedestrian Friendly Fishing Highway Access Highway Accessability Live Music International Landscape Inexpensive Hotels Museums Infrastructure Botanical Gardens Beaches Beautiful Easy to get around Culture Snow Flake **Proximity** Convenient Downtonw Parking Hotel Zip Line Nature Hotels Friendly Sporting Events **Botantical Garden** Lifestyle Modern Beach Public Art Walkability Redmond Weather Lively Diverse Changes Wayfinding Scenery Bustling Relaxing Trails Activities Everything Quiet Old Town Waterfalls Active Vibrant Natural Variety Downtown Easy to get to Service Architecture Little Traffic **Attractions** Running Hotel Proximity Mountains Sightseeing Entertainment East to get around **Outdoor Activities** Convention Center **Public Transport**

What aspects of your last visit did you find negative, disappointing or like the least? N=189

More Advertising Improve Walkability Activities Promotion More Food Trucks More Authenticity Night Police Patrol Local Flavor **More Trash Cans Greater Diversity** Cheaper Hotels Make Friendlier **Promote Activities** Dog Friendly Bike Lanes Authentic Local Businesses Taxi Service Increase Diversity Finish Construction More Open Space Accessability More Nightlife Less Commercialism More Security Family Activities **Bike Zones** More Landmarks Free Parking Mass Transit Better Street Lights

More Landmarks Free Parking Mass Transit Indoor Activities Chain ____ **Narrow Streets Sports Shuttles** More Shopping **Preserve Local Flavor** More Art **Better Online Info** Market in Park Less Expensive Museums Area Map Street Life Light Rail **Wore Parking Outdoor Activities** Construction Water Access **More Events** Pedestrian Orientation **Running Trails** Affordable Dining Friendlier **Better Wayfinding** Wavfinding More Live Music Unique Shopping Downtown Shuttle Add Bike Lanes Small Town Centers Less Luxury Retail **Maintain Cleanliness** More Chef Owned

CONCEPTUAL FRAMEWORK

- Bellevie WASHINGTON
- Drawn from individual pieces and collective body of research.
- A number of emergent findings and potential directions for a destination development strategy.
- 7 general themes around which the Destination Development Strategy could be organized.

Infrastructure
Development /
Hardware /
Physical Assets

Market
Segments /
Visitor Groups

Visitor Activities /
Product
Development

Destination Operations

Regionalism

Destination Differentiators

Professionalizing the DMO

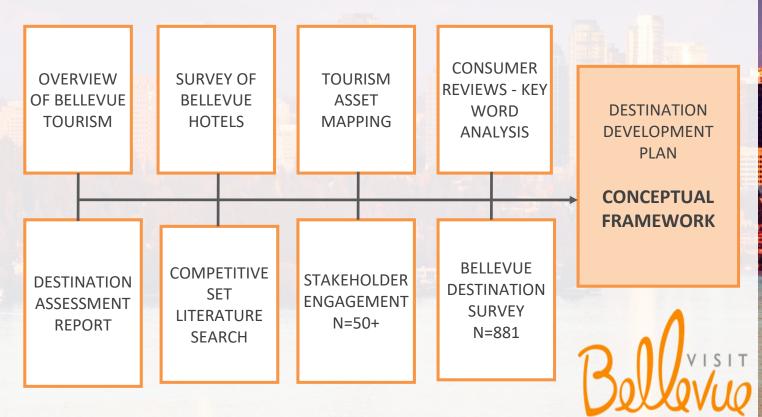
CONCEPTUAL FRAMEWORK BELLEVUE STAKEHOLDER RANKINGS (OUT OF 7)



Visitor Activities / Product Develop	ment		5.4
Infrastructure Development / Hard	4.9		
Market Segments / Visitor Groups		4.2	
Destination Differentiators	4	.1	
Professionalizing the DMO	3.9		
Regionalism	3.4		
Destination Operations	3.2		



PHASE 1-SITUATIONAL ANALYSIS



WASHINGTON

EXAMPLE OF PHASE 2 ACTIVITIES



DESTINATION DEVELOPMENT PLAN

CONCEPTUAL FRAMEWORK

PHYSICAL
ASSESSMENT OF
INFRASTRUCTURE
ASSETS AND
NEIGHBORHOODS

EVENT AND FESTIVAL STRATEGY WORKSHOPS CONSENSUS BUILDING AND PRIORITIES DESTINATION DEVELOPMENT PLAN

STRATEGY,
PROGRAMS,
WORK PLAN,
RESPONSIBILITIES,
BUDGET, TIMING,
MONITORING
MECHANISMS AND
PERFORMANCE
MEASURES

RECOMMENDED NEXT STEPS

Destination Development Plan - Phase 2

- Funded by Visit Bellevue Washington
- Commence early 2017



