



REGIONAL BASELINE ASSESSMENT REPORT

SNOHOMISH COUNTY TOURISM INDUSTRY, WASHINGTON STATE

February 22, 2018

Prepared as part of the Snohomish County Parks, Recreation
and Tourism Regional Destination Development Project

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This Regional Baseline Assessment Report has been prepared as an initial step in implementing the strategies defined in the Snohomish County Strategic Tourism Plan (STP) 2018-2022.

Future iQ was contracted in October 2017 by Snohomish County Department of Park, Recreation and Tourism to undertake a series of industry focus groups and surveys, and produce this Baseline Assessment. The purpose was to create the pivot between the planning phase and the implementation phase for the Strategic Tourism Plan.

REGIONAL BASELINE ASSESSMENT REPORT PREPARED BY:

future→iQ

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1.0 INTRODUCTION

This Regional Baseline Assessment Report has been prepared as an initial step in implementing the strategies defined in the Snohomish County Strategic Tourism Plan (STP) 2018-2022. The STP was prepared following extensive research and stakeholder engagement work through late 2016 and 2017.

This Regional Baseline Assessment Report includes the results of additional research, and the deliberations of industry stakeholder focus groups, conducted during November and December 2017. This report is a key step in shifting from 'planning to implementation'. This Regional Baseline Assessment Report gathered industry stakeholder input via surveys and discussion to help validate the strategies defined in the Strategic Tourism Plan (STP), and build a regionally focused implementation approach in 2018 and beyond.

This Regional Baseline Assessment Report aims to:

- Provide a current snapshot of the County
- Explore the tourism industry – past and future
- Report on the stakeholder input during the November and December focus group sessions
- Explore the building blocks of implementing a regional destination development approach
- Outline key issues for implementation in 2018.

This Regional Baseline Assessment Report represents a handbook for stakeholders, as they progress in detailed implementation planning and execution in 2018 and beyond.

*This Regional Baseline
Assessment Report
lays the foundation for
robust implementation
of the Strategic
Tourism Plan.*



Photo Credit: Snohomish County Tourism Bureau

2.0 SNOHOMISH COUNTY – GENERAL PROFILE

Snohomish (sno-HOH'-mish) County is 2,090 square miles with a population of 787,620, in the northwest area of the state, between Puget Sound on the west coast, and the Cascade Mountains to the east, and between Skagit County to the north and King County (and Seattle) to the south.

2.1 HISTORY AND DEVELOPMENT

Snohomish County has been, and continues to be, home to a number of federally recognized tribes, including the Sauk-Suiattle Indian Tribe, the Stillaguamish Tribe of Indians, and the Tulalip Tribes of Washington. The Native American presence goes back tens of thousands of years, with uninterrupted physical, spiritual and cultural connection to the land and waters of the region.

European settlement of the area followed Captain George Vancouver's claim of much of western Washington for Great Britain in 1792. Snohomish County was taken out of Island County in 1861 and the late 19th century several settlements were established in western Snohomish County. When the Great Northern Railway reached the new city of Everett it brought an economic boom to the area. Snohomish County's early industrial economy was based on the availability of abundant natural resources - primarily timber and farming (Employment Security Department, 2015).

Following World War II, suburban cities were established in the southwestern part of Snohomish County toward Seattle, and economic growth expanded in these areas. In particular, Boeing, established its 747-manufacturing plant near Everett. Development of other high technology industries in Snohomish County have resulted in increased population, and a dramatic shift from an economy based on logging and agriculture to one rooted in manufacturing and an expanding service and tourism sector (Employment Security Department, 2015).

Snohomish County has a rich multi-dimensional history, which can be further leveraged to expand the tourism product on offer.



Photo Credit: Snohomish County Tourism Bureau



2.2 GEOGRAPHY AND LANDSCAPE

Snohomish county has a total area of 2,196 square miles, including 2,087 square miles of land and 109 square miles (5.0%) of water (US Census Bureau, 2012). It is the 13th in size in terms of total land area and is the 7th most densely populated county in Washington, with 362.96 people per square mile in 2015 (Employment Security Department, 2017)

The topography of Snohomish County ranges from Pacific Northwest Coast beaches, rolling hills and farmlands in the west, to dense forest and alpine wilderness, and the crest of the North Cascade Range in the east. Glacier Peak, at 10,541 feet, is a currently dormant volcano, the highest point in Snohomish County and one of the highest in Washington State. Mount Baker National Forest and Snoqualmie National Forest preserve most of the eastern part of the county. The Cascade Mountains provide the headwaters for several major rivers, including the Snohomish, Skykomish, Snoqualmie, and Stillaguamish rivers. The land area of the county is 68% forest land, 18% rural, 9% urban/city and 5% agricultural (Snohomish County, 2017). Population, economic activity and land use has a diverse geographic distribution through Snohomish County with a range of urban, suburban and rural communities. The population centers are primarily in the south adjacent to the border with King County and west along Interstate 5. North and east Snohomish County is characterized by smaller cities, farms and reservations.



The County has a moderate year-round climate. Average temperatures range from about 75°F in July to about 33°F in January. The area is influenced by precipitation coming off the Pacific Ocean by the Olympic Mountains to the west, across the Salish Sea. Annual precipitation in the western part of the county is 35 inches, but increases with elevation into the Cascades Mountains (Index, 110"-120") (Snohomish County, 2017).

Source: <https://snohomishcountywa.gov/2577/About-Snohomish-County>



Photo Credit: Snohomish County Tourism Bureau

2.3 INFRASTRUCTURE AND SERVICES

Snohomish County has abundant marine and land-based infrastructure. The following information is from the Economic Alliance Snohomish County (EASC, 2017).

- **Ports** - The region has multiple deep-water port facilities. The Port of Everett is located in the center of Snohomish County with container, break-bulk and barge facilities available. It also operates Foreign Trade Zone #85 and is the largest recreational marina on the US West Coast.
- **Air Service** - Snohomish County Airport Paine Field is a full-service general aviation airport adjacent to the Boeing Everett plant that accommodates the largest aircraft. Regional commercial air service is beginning at Paine Field in the Fall of 2018 – initial flights will be with United Airlines with arrivals from San Francisco and Denver. Alaska Airlines has recently announced their flight destinations offering 13 non-stop departures to eight locations, commencing fall 2018. These are: Las Vegas, Los Angeles, Phoenix, Portland, San Diego, San Francisco, San Jose and Orange County.
- **Highways** - The Interstate 5 Freeway runs north/south from Canada to Mexico, through Snohomish County, providing direct links throughout the West Coast. There are 17 State Highways that run through the county. The only east / west are US 2 (Skykomish-Snohomish River Valley) and State Route (SR) 530 (Stillaguamish-Sauk River Valley).
- **Rail** - Commuter rail service by Sound Transit connects Everett through Seattle to the City of Tacoma. The Sound Transit regional light rail system is under construction from Everett to the SeaTac Airport. Burlington Northern/Santa Fe Railroad owns the freight rail network in Snohomish County.
- **Ferry Service** - The Washington State Ferry System is an extension of the state highway system and is the largest of its kind in the world. Daily, it transports thousands of workers in and out of Snohomish County from residential communities across the water. The Mukilteo Ferry runs to Whidbey Island; the Edmonds Ferry goes to Kingston (Kitsap Peninsula)
- **Bus Service** - Community Transit, Everett Transit and Sound Transit are the three main transit authorities serving Snohomish County by bus service.
- **Electricity** - Electricity in the county is provided by the publicly owned Snohomish County Public Utility District No. 1 (PUD). 80% of the power comes from the Bonneville Power Administration (BPA), an entity of the US Department of Energy.
- **Gas** - Distribution of natural gas in Snohomish County is provided by Puget Sound Energy (PSE), a regional, investor-owned utility.
- **Water / Wastewater** - Water and wastewater service in most of Snohomish County is provided through the City of Everett, supplemented by local resources.

The introduction of a commercial air service at Paine Field has the potential of significantly changing the inbound tourism market.



2.4 DEMOGRAPHIC PROFILE

Snohomish County shows typical age demographics of suburban and industrial areas, suggesting that people move to Snohomish County to work and raise their families. The county has a slightly larger proportion of youth under age 18 than the state, and a lower proportion of young adults between ages 20 and 24. The proportion of the population between age 30 and 60 exceeds that of the state, and the population aged 60 and above is lower in Snohomish County. As the baby boomer generation ages, the population distribution by age is expected to smooth over time (Employment Security Department, 2017). The racial and ethnic makeup of Snohomish County shows a higher representation of Asian residents (10.7 percent), and a lower representation of Black (3.1 percent) and Hispanic residents (9.7 percent) compared with the state (Employment Security Department, 2017).

	Snohomish County	Washington State
Population by age, 2016		
Under 5 years old	6.3%	6.2%
Under 18 years old	22.8%	22.4%
65 years and older	12.8%	14.8%
Females, 2016	49.8%	50.0%
Race/ethnicity, 2016		
White	79.2%	80.0%
Black	3.3%	4.1%
American Indian, Alaskan Native	1.6%	1.9%
Asian, Native, Hawaiian, other Pacific Islander	11.3%	9.4%
Hispanic or Latino, any race	9.9%	12.4%

Source: U.S. Census Bureau QuickFacts



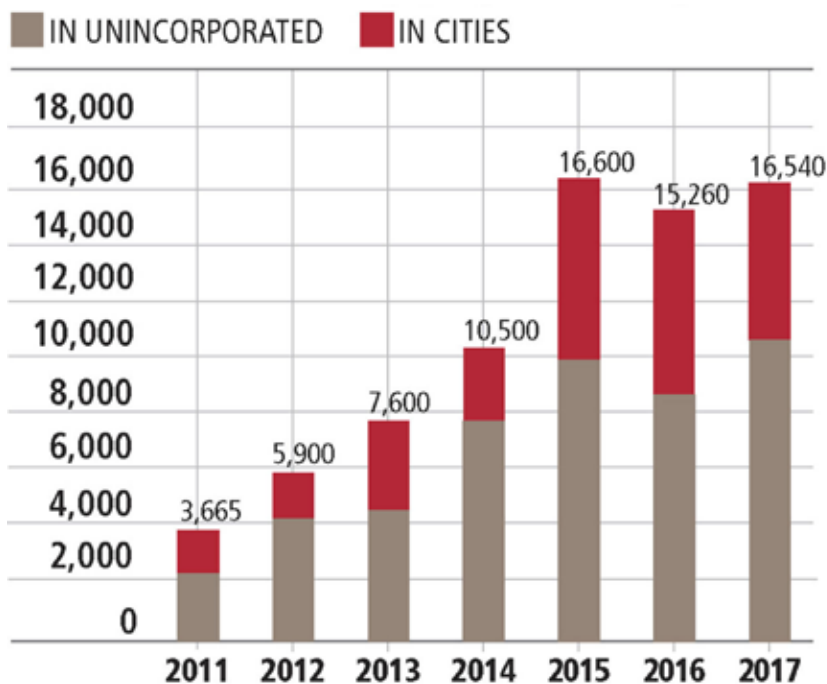
2.4.1 POPULATION GROWTH

Snohomish County has the third highest county population in Washington State, after King and Pierce counties. The county population is 787,620 (EASC Website, 2017). In recent decades, Snohomish County's population growth rate has exceeded those of the state and the nation, and this trend is projected to continue. Migration trends tend to be linked closely with economic cycles, and during the recent recession and recovery period, Snohomish County's usual migration-related increase declined, and between 2010 and 2011, Snohomish County saw net out-migration. Since 2011, the Snohomish County population has continued to increase (Employment Security Department, 2017).

Population growth will continue to place pressure on transportation and recreation infrastructure.

Population growth in recent years has been particularly high outside the main cities, with six out of every 10 moving to unincorporated areas, particularly around Bothell, North Creek, Lake Stevens and Marysville. Among cities, Everett added the most 'new residents' in the past three years (4,900), followed by Marysville (3,300) and Lake Stevens (2,570) (Cornfield and North, 2017). Population has risen faster in unincorporated areas than cities in each of the past seven years; of 76,065 new residents since 2010, 47,508 moved to an unincorporated area, compared to 28,557 who now live in a city (Cornfield and North, 2017).

Snohomish County Population Growth

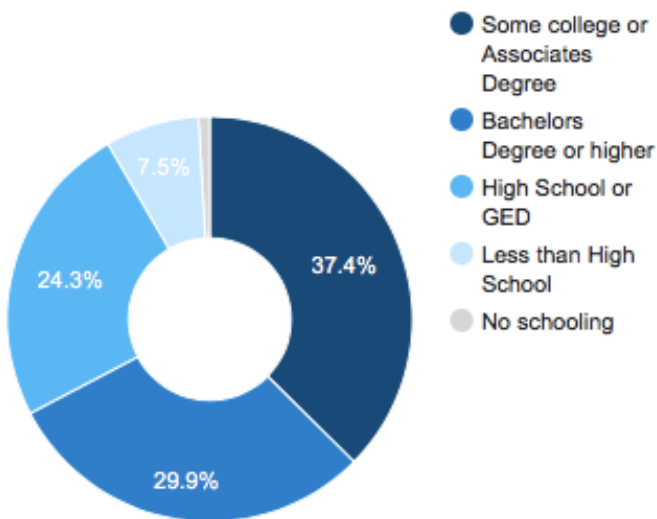




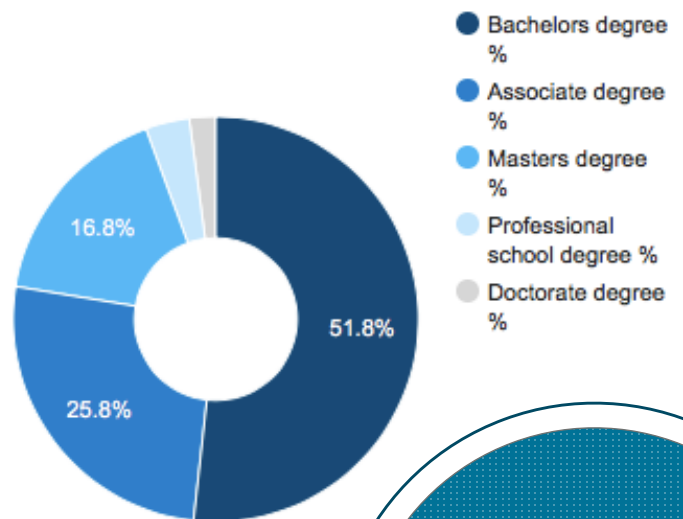
2.4.2 EDUCATIONAL ATTAINMENT

In Snohomish County, 92% of the population has high school education or higher, compared with 90% for the state of Washington, and 87% for the nation. And, 30% have obtained a bachelor's degree or higher, which is lower than the state at 33%, but the same as the national population (US Census Quick Facts and Towncharts.com).

Snohomish County, WA Education Attainment Breakdown



Snohomish County, WA Higher Education Attainment



Source: Towncharts.com <http://www.towncharts.com/Washington/Education/Snohomish-County-WA-Education-data.html>

There are numerous institutions in Snohomish County offering a diverse array of post-secondary education options, such as Elson S. Floyd College of Medicine at Washington State University, North Puget Sound provides medical training. Washington Aerospace Training and Research (WATR) Center offers short programs to prepare students for entry-level positions in the aerospace industry, with Boeing being a main employer. Everett Community College's Advanced Manufacturing Training and Education Center (AMTEC) and the WATR Center train students in cutting-edge composite manufacturing and skills.

National and statewide workforce constraints will have continued impacts on labor dependent tourism businesses.



Snohomish's economic performance is driven by the close proximity to Seattle, and strong local industries. Tourism has a key role in this performance.

2.5 ECONOMIC PROFILE

Snohomish County has seen a shift from a historic economy based on logging and agriculture, to one rooted in manufacturing and an expanding service sector. Over 20,500 businesses are based in Snohomish County, ranging from small family farms to the world's largest advanced manufacturing facility producing state-of-art aerospace equipment. The fifty largest employers account for over 96,900 jobs (34% of total employment) (EASC Website, 2017).

Recent economic developments have focused on recovering from the recent recession, where job losses started in mid-2008, with the lowest employment levels recorded in 2010. Since 2010, all private-sector industry groups have seen overall increases in employment and the local unemployment rate has been dropping. Manufacturing employment is expected to increase when the Boeing Company begins production of the 777X in its Everett facility. (Employment Security Department, 2017).



Snohomish County is in the Seattle metropolitan area, which is the headquarters for firms with national and worldwide recognition, including Alaska Airlines, Amazon.com, Coinstar/Redbox, Costco, Expedia.com, Microsoft, Nintendo, Nordstrom, Recreational Equipment Inc. (REI), and Starbucks (EASC Website, 2017). Not surprisingly, many people commute out of the county to jobs in King County centers, such as Bellevue, Seattle and Redmond.

Source: Economic Alliance Snohomish County, 2017



2.5.1 WORKFORCE

Snohomish County's work force was 412,178 in 2016, with an unemployment rate of 4.4 percent. During the recent period of recession peak unemployment rates were reached in early 2010 at 11.2% (Employment Security Department, 2017).

The age of the work force is slightly older than statewide; where the state workforce has proportionally more workers age 25 to 44, Snohomish County's workforce has proportionally more workers age 45 to 64. This is a reflection of industry employment patterns, with almost 30 percent of the manufacturing workforce in the county at age 55 or older. (Employment Security Department, 2017)

In 2016, 53.7 percent of all jobs were held by men, while 46.3 percent were held by women.

- Male-dominant industries included mining (86.9 percent), construction (79.6 percent), transportation and warehousing (75.1 percent) and manufacturing (74.5 percent).
- Female-dominated industries included healthcare and social assistance (78.3 percent), educational services (73.8 percent) and finance and insurance (66.1 percent)

The majority of employment in Snohomish County comes from service industries, such as trade, transportation, utilities, wholesale, retail, information, financial activities, professional and business services, education, health, and leisure and hospitality. This is followed by goods producing industries, such as manufacturing, construction, mining and logging. Local, federal and state governments also employ a smaller, but significant part of the workforce (Economic Alliance Snohomish County [EASC], 2017. About the Region.)

Tourism helps create more regional economic diversification, and offers new entrepreneurial opportunities connected to outdoor recreation.



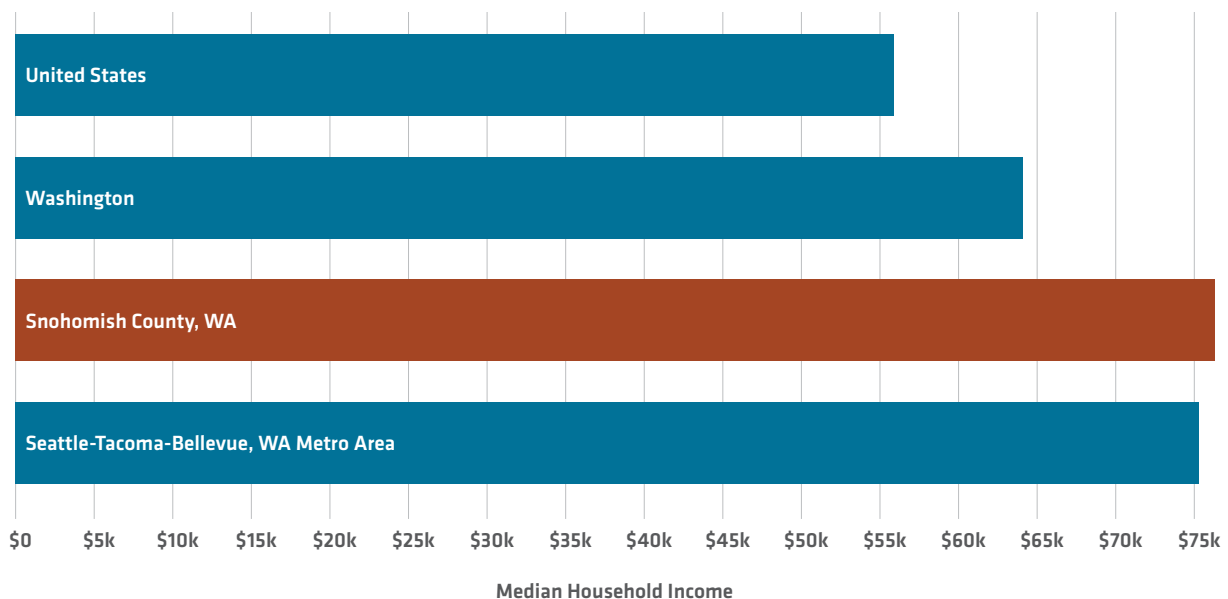
2.5.2 INCOME LEVELS

The average annual wage in Snohomish County was \$57,456 for all industries in 2016, and the median household income was \$77,985. The median hourly wage was \$25.03 in 2016, compared to a statewide median wage of \$23.91 per hour. However, in 2015, the per capita personal income in Snohomish County was \$47,421, less than both the state (\$51,898) and the nation (\$48,112). Per capita personal income equals total personal income divided by the resident population. (Employment Security Department, 2017).

In 2015, 9.2 percent of the resident population in Snohomish County was estimated to be living below the poverty level. Statewide (12.2%) and national (14.7%) poverty levels were higher. Childhood poverty levels tend to exceed all ages' averages. In Snohomish County, for 2015, 12.0 percent of all children under age 18 were reported as living below the poverty level (Employment Security Department, 2017).

Day-tripper tourism is driven, in part, by affluent local populations.

Median Household Income in Snohomish County, WA – The closest comparable data for the county of Snohomish County, WA is from the state of Washington



Source: Data USA <https://datausa.io/profile/geo/snohomish-county-wa/#economy>



3.0 SNOHOMISH COUNTY TOURISM – PAST AND FUTURE

3.1 CURRENT TOURISM INDUSTRY PROFILE

3.1.1 TOURISM AND VISITOR INFORMATION

The travel and tourism industry spans several sectors, and is a key component of the economy in Snohomish County. In 2015, visitors spent \$934.5 million in Snohomish County, and their spending generated direct employment of 10,750 jobs or about 3.0% of total Snohomish County employment. The number of indirect jobs (suppliers to the tourism industry) is usually similar to the number of direct jobs, so tourism could be responsible for over 20,000 direct and indirect jobs in the county. Visitor spending and employment related to tourism have been increasing since 2000 (Resonance and Berk, 2017).

The tourism industry is growing, and employs over 10,000 people, and generates a visitor spend of over \$1billion per annum.

Snohomish County Direct Travel Impacts, 2000-2015

	2000	2005	2010	2014	2015p	Annual % Chg.	
						14-15p	00-15p
Spending (\$Million)							
Total (Current \$)	577.8	694.0	827.1	996.1	1,013.5	1.8%	3.8%
Other	51.3	65.3	80.9	94.6	79.0	-16.4%	2.9%
Visitor	526.5	628.6	746.2	901.5	934.5	3.7%	3.9%
Non-transportation	449.6	525.0	616.7	748.6	788.2	5.3%	3.8%
Transportation	76.9	103.6	129.5	152.8	146.3	-4.3%	4.4%
Earnings (\$Million)							
Earnings (Current \$)	157.7	184.0	210.1	258.6	273.9	5.9%	3.7%
Employment							
Employment	8,840	9,050	9,570	10,450	10,750	2.9%	1.3%
Tax Revenue (\$Million)							
Total (Current \$)	53.9	66.4	77.7	94.7	99.3	4.8%	4.2%
Local	15.8	20.6	24.1	31.3	33.1	5.7%	5.0%
Visitor	8.9	12.5	14.7	19.9	21.1	5.7%	5.9%
Business or Employee	6.9	8.1	9.3	11.4	12.0	5.6%	3.8%
State	38.1	45.8	53.6	63.4	66.2	4.4%	3.8%
Visitor	29.1	35.2	41.8	49.0	50.9	3.9%	3.8%
Business or Employee	9.0	10.6	11.8	14.4	15.3	6.0%	3.6%



Photo Credit: Snohomish County Tourism Bureau

3.1.2 VISITOR SPENDING

Visitor spending has been increasing in all categories since 2000, and in 2014, they spent \$902 million (in 2014 dollars) in Snohomish County. Visitors spend the most (nearly half) on food and transportation/gas. Categories of spending in Snohomish County are similar to Pierce and Kitsap, however these differ from King County, where air transportation and accommodations combined equal 42.7% of total visitor spending (Resonance and Berk, 2017).

The following table exhibits present inflation-adjusted spending in visitor-related sectors by commodity type.

The tourism economy in Snohomish County is strong, and has considerable upside potential.

Snohomish County Visitor Spending by Commodity (in Millions, 2014\$)

Commodity	2000	2005	2010	2012	2013	2014	Percent of Total, 2014
Food Service	108.5	154.6	218.4	246.4	266.1	290.0	32%
Local Tran. & Gas	56.1	84.6	119.8	137.8	144.3	153.0	17%
Retail Sales	77.2	90.3	112.4	123.2	128.6	136.0	15%
Arts, Ent. & Rec.	67.7	86.3	106.9	116.4	122.7	131.0	15%
Accommodations	48.1	60.2	83.9	103.8	111.9	131.0	15%
Food Stores	26.2	35.8	46.1	53.4	56.0	61.0	7%
Visitor Air Transport	0.0	0.0	0.0	0.0	0.0	0.0	0%
Total	383.9	511.9	687.4	780.9	829.7	902.0	100%

Source: Dean Runyan, 2014; BERK, 2016

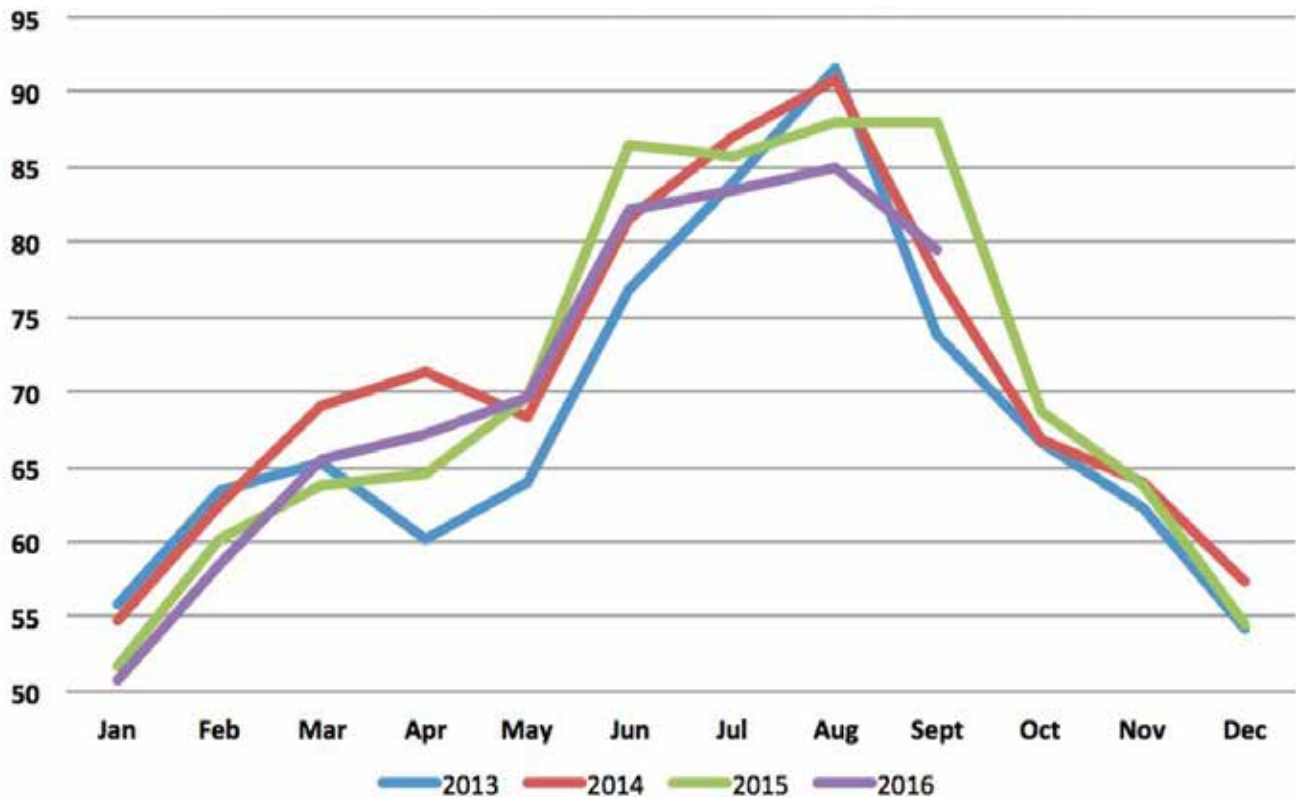


3.1.3 SEASONALITY OF VISITATION

Tourism in Snohomish County is very successful from May through September, however, shoulder and off seasons in the county offer many excellent experiences. Opportunities to convert day trippers to overnight stays from October through April will increase with appropriate product development and marketing. Product development should be focused on building activities and events related to season specific outdoor experiences, and cultural arts including galleries, live music, performance venues, and museums to extend stays (Resonance and Berk, 2017).

The tourism season is strongly seasonal – which places pressure on resources in peak months. There is the potential to build the shoulder seasons.

Snohomish County - Occupancy (Percent)



Source: Smith Travel Research; Resonance - (Resonance 2017 - Situational Analysis)



3.1.4 CURRENT VISITOR BEHAVIOR AND DESTINATIONS

Tourists visiting Snohomish County are typically day-trippers. As part of the development of the Strategic Tourism Plan, Resonance Consultancy conducted a Visitor Survey for Snohomish County (Resonance, 2017). The sample was relatively small, with 217 responses. However, it does provide a good baseline profile. More details on these survey results are available in the Strategic Tourism Plan Visitor Survey Report (December 22, 2016).

The survey results highlight the following main visitor behavior and destinations:

Affluent Day trippers and short stays

- Visitors tended to live within driving distance of Snohomish County, with a smaller number throughout the U.S. and BC, Canada.
- Respondents tended to be white and older with more than half 55+ years old and nearly half with an annual income exceeding \$60k per year.
- More than one third of visitors came to Snohomish County for a day trip, while short trips of 2-4 nights was strong at 22.7%, followed by 15+ nights at 14.3%. One-night trips accounted for only 13.6% of visits.
- For those visitors that stayed overnight, one-third stayed in a Hotel / Motel, while 1 in 10 stayed at a Campground or RV Park. 12.2% stayed with Family or Friends, while 2.0% stayed in their second home and 1.4% used Airbnb.

Regular repeat visitors to the region

- 7 out of 10 respondents told us that they are a regular or occasional visitor. Only 20.3% of visitors were first time visitors.
- Snohomish County visitors nearly always came to Washington State by automobile.
- Visitors usually visit Snohomish County as a single person, couples, family or small group.
- Respondents told us that on their last visit they also visited Seattle (60.0%), followed by Bellingham (21.8%), Bellevue/Kirkland (19.1%), Portland OR (17.3%) and Stevens Pass (15.5%).
- Respondents told us that on their last visit they specifically visited Central - Snohomish (40.6%), followed by Central - Everett (34.6%), South - Mukilteo (22.6%) and North - Marysville / Tulalip (21.1%).

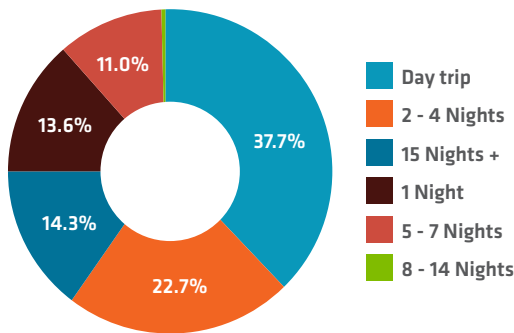
Encouraging extended visitor 'length of stay' will help increase direct economic impacts, and reduce daily seasonal traffic congestion.



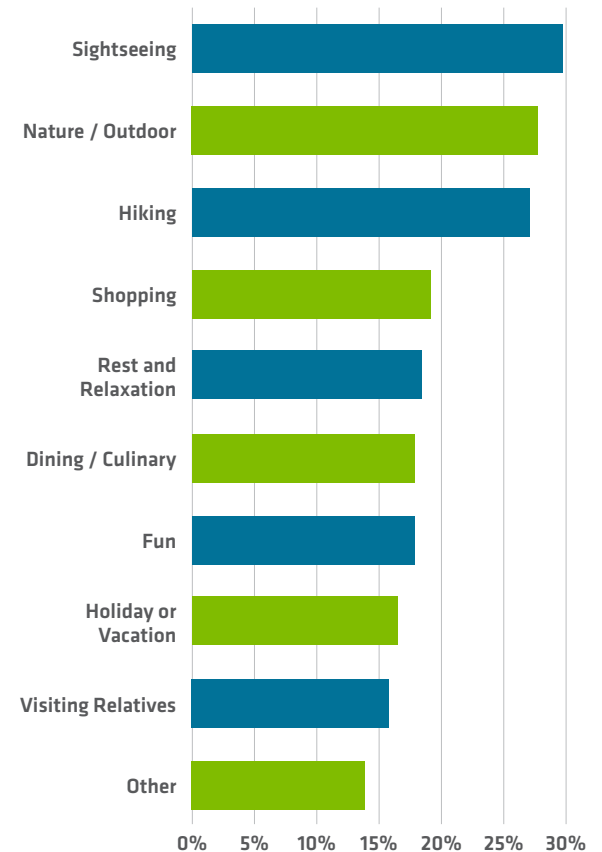
3.1.5 VISITOR PROFILE SNAPSHOT

While the visitor sample was relatively small in the Strategic Tourism Plan Visitor Survey, (December 22, 2016), it does provide an interesting snapshot into the visitor profile. Some of the key visitor metrics in this survey sample included:

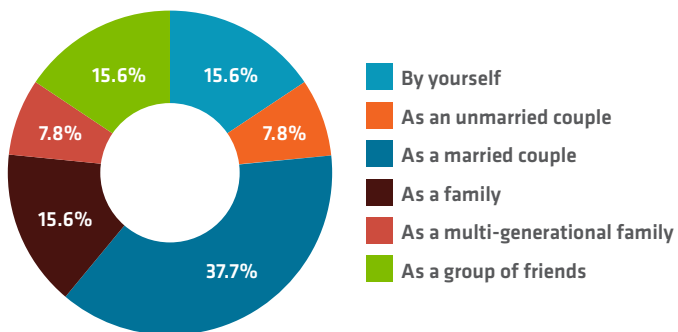
How long did you stay in Snohomish County on your last visit?



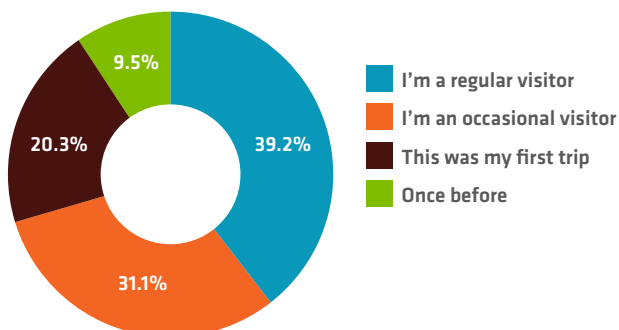
What are the main reasons for your last visit to Snohomish County?



Did you travel...



How frequently do you come to Snohomish County?





3.1.6 TOURISM ATTRACTIONS AND ACTIVITIES

Snohomish County has a spectacular natural scenery, and it is a recreational center with a temperate climate that encourages year-round outdoor activities, including water sports such as kayaking, rafting, waterskiing, scuba-diving, and power/sailboat cruising. The Cascade Mountains offer hiking, mountain biking and climbing in the summer and skiing, snowshoeing, and snowmobiling in the winter. These natural amenities are supplemented by cultural activities, entertainment and sporting events offered by metropolitan areas.

The 2016 Visitors Survey obtained the following information about the activities which are drawing visitors to Snohomish County (Strategic Tourism Plan Visitor Survey, December 22, 2016).

- The most important criteria for visiting Snohomish County were: Outdoor Activities & Parks, followed by Paid Places to Stay, Events, Festivals & Fairs, Places to Eat & Drink, Attractions and Amusements and Shopping. The least important aspects for visiting Snohomish County were Nightlife and Spectator Sports.
- Snohomish County's Scenery, Beauty, People, Friendliness, Hiking, Restaurants/Dining, Shopping, Variety and Trails are excellent or outstanding.
- In terms of range and number of activities, the county does well in the categories of Outdoor Activities & Parks, Sports & Recreation (Participatory) and Places to Eat & Drink and Shopping, and does not do very well in terms of Nightlife or Attractions and Amusements
- Among the most interesting responses to additional things visitors would like to see in Snohomish County are: more Events/Festivals, Native American landmarks / history / sites, Beer and Wine tastings/festivals, Live Music, more Hiking and Biking Trails, Food Trucks, Farm to Table dining, and more Small Shops/Boutiques.

There is significant potential to create additional tourism product that builds on local foods, recreational experiences and 'wholesome' experiences.



Word-cloud of responses to the question: "What aspects of your last visit (to Snohomish County) did you find excellent, outstanding or like the most?"



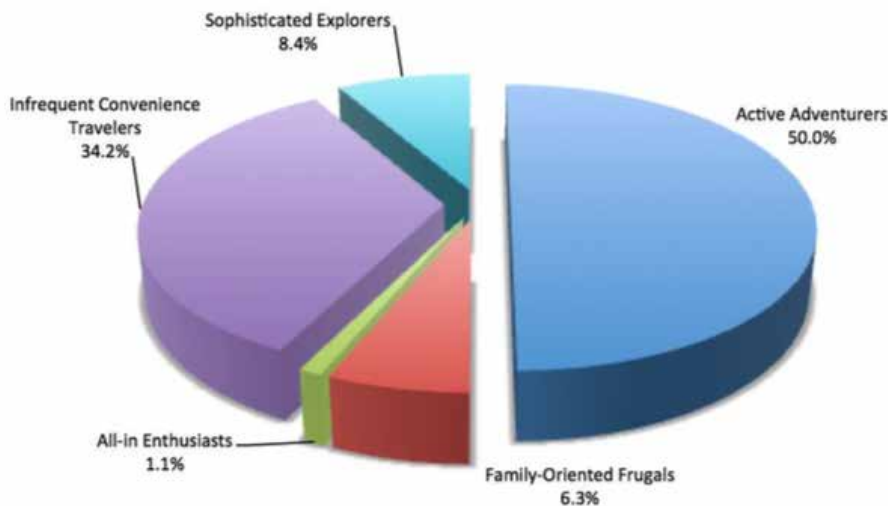
3.1.7 CURRENT VISITOR PROFILE

The tourism marketing industry uses an approach to identify Visitor Psychographic, which is a way to categorize visitors by interest and expected behavior. The 2016 Visitors Survey identified that the majority (84.2%) of visitors are "Active Adventurers" and "Infrequent Convenience Travelers". Snohomish County visitors and residents are less likely to be "Sophisticated Explorers", "All-in-Enthusiasts" or "Family-Oriented Frugals".

Main Visitor Psychographic

- **Active Adventurers** have a great interest in engaging with nature and participating in outdoor activities. This group doesn't see a vacation as a time to slow down or be indulgent; they want to explore new things and be active. 91% participate in outdoor sports while at their destination.
- **Infrequent Convenience Travelers** are overwhelmingly female (69%) with lower net worth. They take fewer and shorter trips, tending to stay close to home and spending less per vacation. They are primarily domestic travelers, and less interested in nearly all activities, aside from dining and seeking fun attractions. Their reasons for vacation are clear: 87% say they go on vacation to escape everyday life, while 80% seek to slow down and relax.

The outstanding outdoor recreation resources offer the potential increase of high-value visitors in categories like 'Sophisticated Explorers' and 'All-in-Enthusiasts'.



Source: Strategic Tourism Plan Visitor Survey, December 22, 2016



3.1.8 COMPARATIVE DESTINATION ASSESSMENT

The Snohomish County tourism industry has been compared to other counties in Washington, Oregon, and British Columbia (Canada). Resonance Consultancy completed a destination assessment for Snohomish County (Resonance 2017) utilizing Trip Advisor and Yelp reviews to compare quality experiences (those rated very good or excellent) in culture, entertainment, sightseeing, sports & adventure, culinary, and lodging experiences in Snohomish County with other counties in Washington, Oregon, and British Columbia. A competitive set comparison and analysis was completed for Snohomish County with:

- Chelan County, WA (Wenatchee)
- Clallam County, WA (Port Angeles)
- Deschutes County, OR (Bend)
- Jefferson County, WA (Port Townsend)
- King County, WA (Seattle)
- Kitsap County, WA (Port Orchard / Bremerton)
- Lane County, OR (Eugene)
- Metro Vancouver, BC (Vancouver)
- Multnomah County, OR (Portland)
- Pierce County, WA (Tacoma)
- Skagit County, WA (Mount Vernon)
- Spokane County, WA (Spokane)
- Thurston County, WA (Olympia)
- Whatcom County, WA (Bellingham)

The existing strong established lodging and restaurant sectors provides an excellent 'base-camp' for visitors to explore the region and County.

Overall, Snohomish County is ranked in 5th place within its competitive set on the absolute scale and 4th place on the indexed scale. Snohomish County scores in the top half (1st-8th place) of its competitive set in 15 of the 17 areas of analysis on the absolute scale. This is reflective of Snohomish County's modest strength as a tourism destination. On a relative basis (i.e. quality experiences per 100k visitors), Snohomish County only maintains top half rankings in 7 of the 17 categories.

- In absolute terms, Snohomish County scores well in Restaurants (819 Quality Establishments (QE)), Hotels (50 QE), Outdoor Activities (32 QE) and Nature & Parks (31 QE).
- In relative terms, Snohomish County scores best in Casinos & Gambling (2nd place) and Restaurants (4th place).
- The Total rankings for quality tourism within this customized competitive set shows Snohomish County in the top tier of the absolute scale (5th place) and relative scales (4th place). King County and Metro Vancouver lead in absolute terms, while Metro Vancouver and Multnomah County lead in relative terms.
- Based on the relative scale, Snohomish County is generally strongest in Lodging, followed by Culinary (due to Restaurants) and Entertainment (due to Casinos), and moderately strong in the aggregate groupings of Sports & Adventure, Sightseeing and Culture.

Full results are available in *Snohomish County Tourism Strategic Plan: Destination Assessment, January 6, 2017*.

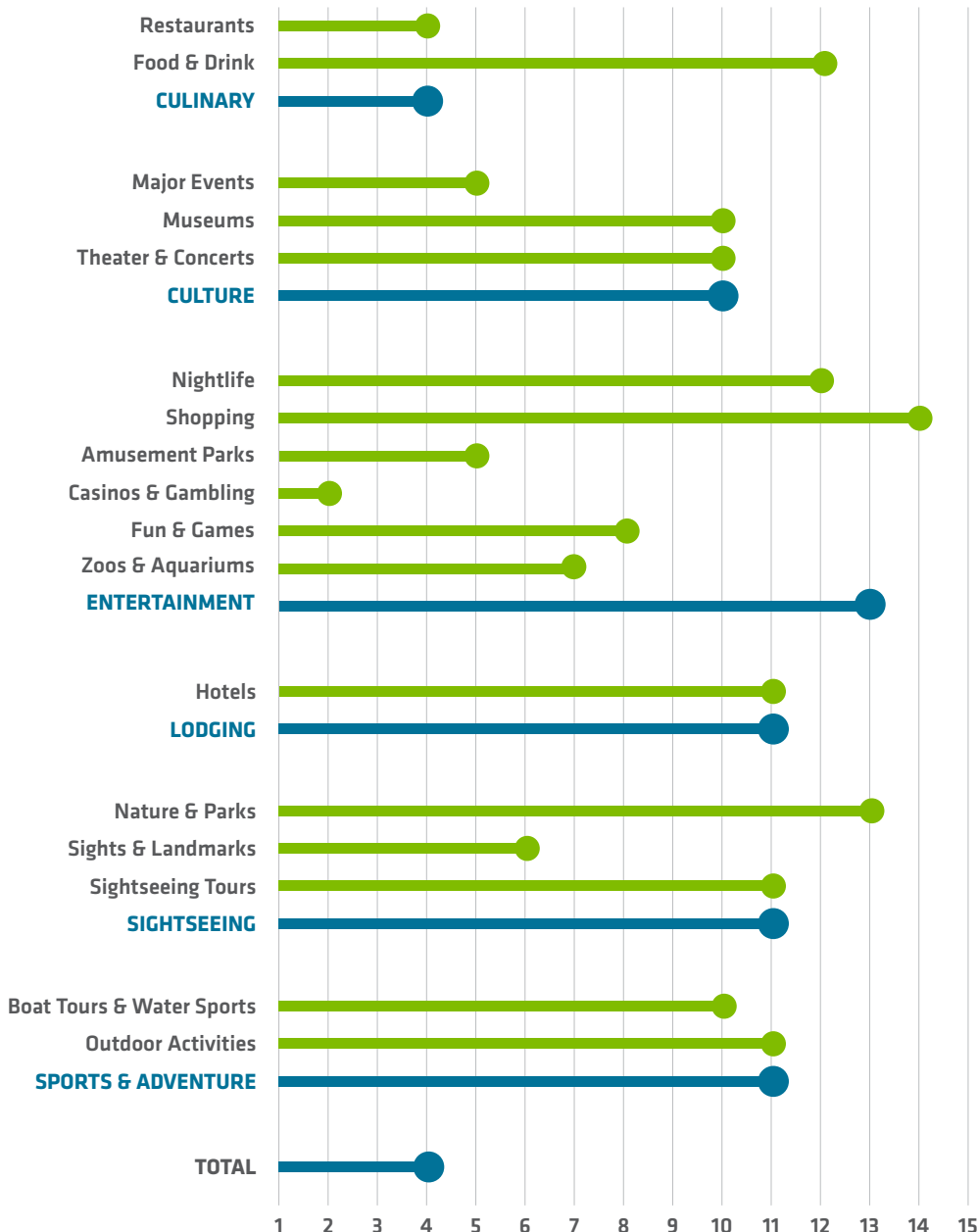


Photo Credit: Snohomish County Tourism Bureau

The new casino being built by Tulalip Tribes, to replace the current Quil Ceda Creek Casino, will enhance the overall quality of establishments in the Casinos and Gambling category.

3.1.9 SNOHOMISH COUNTY COMPARATIVE PERFORMANCE

The Indexed Ranking analysis (within the Competitive Set), undertaken by Resonance (January 2017) provides an insight into the areas of relative strength of Snohomish County. The ranking of 1 would indicate the strongest performance amongst the competitive set.





3.2 IMPORTANT EMERGING TOURISM TRENDS

In considering the implementation of the Snohomish County Strategic Tourism Plan, significant consideration must be given to how tourism is changing. This is being driven by larger external trends and evolutions in society. This section explores some of the emerging trends.

The domestic travel market continues to be the largest share of the tourism market in the USA, however international markets are critical to developing a strong tourism industry. Both the domestic and international tourism markets are expected to continue to grow, providing an important source of economic development in the US, and in Snohomish County. Combining the information on the existing visitor markets with global and national tourism trends, will help Snohomish County determine how to optimally develop the tourism industry.

The growing size and spending power of the Asian middle class is resulting in a dramatic increase in the numbers of tourists and visitors from those countries.

3.2.1 GROWING GLOBAL MIDDLE CLASS CONSUMER SPENDING

There is currently a massive growth of the global middle class spending occurring, especially in the Asia region. Between 2009 and 2030, it is expected that the middle class spending in the Asia Pacific region will increase by nearly 600% and increase by some USD \$28 trillion. This is significant, as increasing middle class spending power equates to increasing disposable income. This results in more tourism travel.

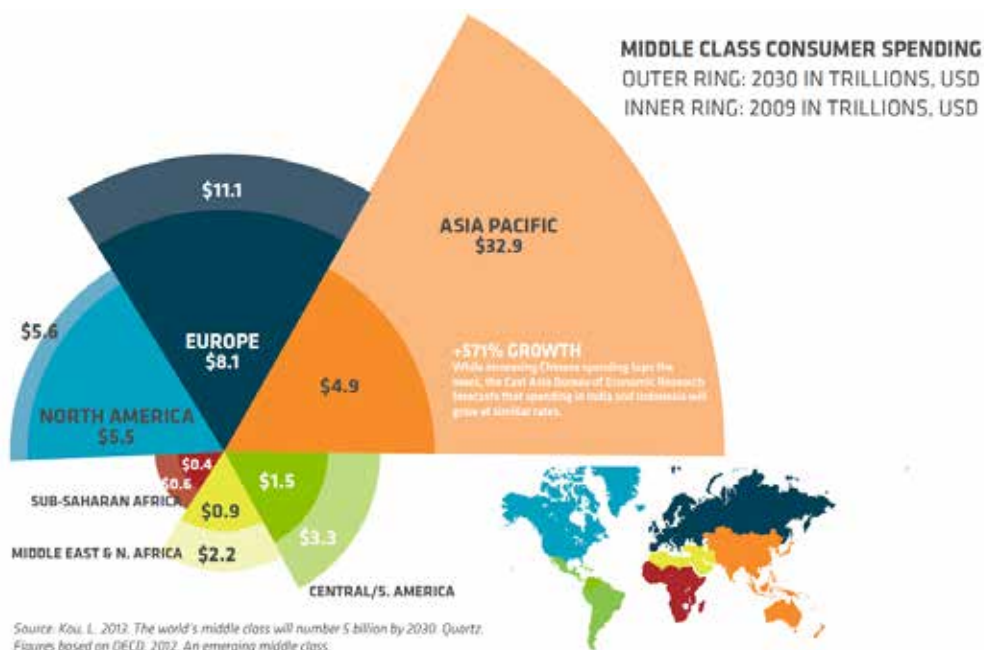




Photo Credit: Snohomish County Tourism Bureau

Snohomish County has some world-class tourism destinations. Adapting to changing international visitor numbers and profiles will create challenges and opportunities.

3.2.2 INCREASING NUMBERS OF TOURISTS FROM ASIA

A growing middle class in Asia is already creating a noticeable shift in international travelers. Europe is and will likely remain, the largest overseas market for visitors to the U.S., however its market share is decreasing (from 50 percent in 2008, to a projected 36 percent in 2020). The largest growing market is Asia with its share projected to continue to increase (from 24 percent in 2008 to a projected 34 percent in 2020). China is the most notable increased market from the 22nd-largest overseas source market in 2000, to the third-largest in 2016, and second-largest (projected) in 2020 (US Travel Association, 2016).

This shift will require tourism destination regions to consider new types of services and experiences. Snohomish County has the capacity to respond to this shift, as it has a wide variety of existing tourism experiences and destinations.

VISITATION TO THE U.S. BY WORLD REGION						
	Share of overseas arrivals			U.S. arrivals, thousands		
	2008	2016	2020	2008	2016	2020
Europe	50.4%	39.2%	36.4%	12,783	14,724	15,319
Asia	24.4%	30.2%	33.8%	6,179	11,347	14,247
Oceania	3.4%	4.4%	4.1%	852	1,656	1,730
Latin America & Caribbean	17.9%	21.3%	21.6%	4,531	8,023	9,108
Middle East	2.7%	3.5%	3.0%	681	1,297	1,266
Africa	1.2%	1.4%	1.4%	315	543	571
Total Overseas	100%	100%	100%	25,341	37,589	42,126

Source: U.S. Department of Commerce and Oxford Economics

Source: Fact Sheet: International Inbound Travel to the US (2016), US Travel Association.



Photo Credit: Snohomish County Tourism Bureau

3.2.3 EVOLVING TOURIST PROFILES

The visitor profile is becoming increasingly diverse. Demographic and societal shifts mean that Snohomish County tourism industry will need to develop infrastructure, products, programming, and services that resonate with these diverse groups, and adjust its marketing and market positioning accordingly. The Snohomish County Strategic Tourism Plan Situational Analysis (Resonance and Berk, 2017) identified the following key trends in visitors:

- Millennials** - Millennial travel spending has grown 30% since 2007, and they now account for 20% of all travel spending around the globe. Millennials are far more interested in international travel than non-Millennials, and they are also more interested in urban destinations than resorts and countryside vacations. U.S. Millennials will soon eclipse Baby Boomers in terms of total tourism-related spending and will be the largest demographic cohort.
- Unstoppable Elders** - The "elders" target group is estimated between 1.3 and 1.6 billion worldwide, and 59% of 55+ U.S. affluent consumers define retirement as "a time to travel and explore new places." It is also typical that elders travel for rest and relaxation, staying 3 - 4 days and 9 - 10 days, with off-peak periods a favorable time to travel. Seniors are the developed world's wealthiest and most demanding visitors, and are looking for safe and secure destinations that are quieter and less congested.
- Millions of Millionaires** - The number of U.S. millionaires is projected to grow from 10.5 million in 2011 to 20.5 million in 2020, according to Deloitte & Oxford Economics. At the same time, the top 9% of U.S. Households (Household Income \$150k+) account for 29% of all spending on air travel and lodging.
- LGBT Tourism** - LGBT spending on tourism will exceed US \$200 billion in 2014, with a growing number of destinations competing for their fair share. Out Now Global reports that 73% of LGBT travelers said that the situation of local LGBT people affected their choice of holiday destinations. This is a case of the customer choosing to take their business to a place where they know they will be equally respected and welcomed.
- Multi-Generational Travel** - Fewer adults are traveling with children. In 2012, 26 percent of domestic leisure travelers travelled with children under the age of 18 (408.5 million trips) compared with 2008, when 31 percent of adults travelled with children (466.2 million trips). However, 40% of families went on a multigenerational vacation in the past year. Today's seniors are living longer, healthier and more mobile lives and are eager to make up for lost time and long distances away from their beloved grandchildren. In fact, grandparents travel almost 25% more than the average leisure traveler.

Snohomish County tourism industry will need to consider how to develop infrastructure, products, programming, and services that resonate with increasingly diverse visitor groups.



Photo Credit: Snohomish County Tourism Bureau

Snohomish County is well positioned to offer an increasingly diverse range of tourism products and activities to suit changing visitor demands.

3.2.4 EMERGING TOURISM ACTIVITIES

The general trend in visitor activities is an increased focus on experiences and facilitated activities.

The Snohomish County Strategic Tourism Plan Situational Analysis (Resonance and Berk, 2017)

identified the following key emergent trends in visitor activities that are relevant to Snohomish County:

- **Creative Tourism** - Creative tourism is propelled by visitors seeking an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place. It also provides a connection with those who reside in the place and who create a living culture.
- **Whole Living** - Whole Living is the idea of balancing work with play, indulgence with discipline, good living with wellness and luxury with simplicity. It is the notion, in travel, that all aspects of the experience contribute to well-being.
- **Culinary Tourism** - Culinary tourism is one of the most dynamic and creative segments of tourism today. \$12 billion is spent directly on culinary activities while traveling, and 88% of destinations consider gastronomy strategic in defining their brand and image.
- **Conspicuous Leisure** - Consumers are now signaling their social status through consumption of experiences rather than material goods, and a 'bucket list' destination is not a prerequisite, but unique experiences are.
- **Active Adventures** - The value of the global outbound adventure travel sector was more than \$345 billion in 2012, while growth in adventure travel has accelerated at a 65 percent yearly rate since 2009. More importantly, nearly 54% of travelers are planning an adventure activity on their next trip.
- **Shopping Tourism** - Tourists spend approximately one-third of their total tourism expenditures on retail purchases, including add-on opportunities of the attraction / destination, general shopping experiences, and to experience local culture.
- **Athletic Events** - Sports can deliver significant one-time visitation or a continuing stream of visitors and revenue from visiting amateur, collegiate and professional leagues and associations.
- **Walk 'n Roll** - Walking is one of the most popular vacation activities of U.S. travelers, and the popularity of bike share programs is growing throughout the country. Cycling is growing the fastest with young consumers – 4.36 million young adults (18-24) participated in cycling in 2012 versus 2.8 million in 2008.
- **Collaborative Consumption** - The growth of consumer sharing applications such as Airbnb and Uber has been exponential in the last few years. Airbnb has grown from 50,000 listings in 2011 to 550,000 listings in 2013; Airbnb booked 4 million stays worldwide in 2012 and more than 11 million stays in 2013.
- **Bleisure** - According to a U.S. report published by Orbitz in 2012, 72% of business travelers said that they take extended executive trips that have a leisure component. Another study by Egencia reports that 54% of 18-30 year olds bring a significant other on a business trip.



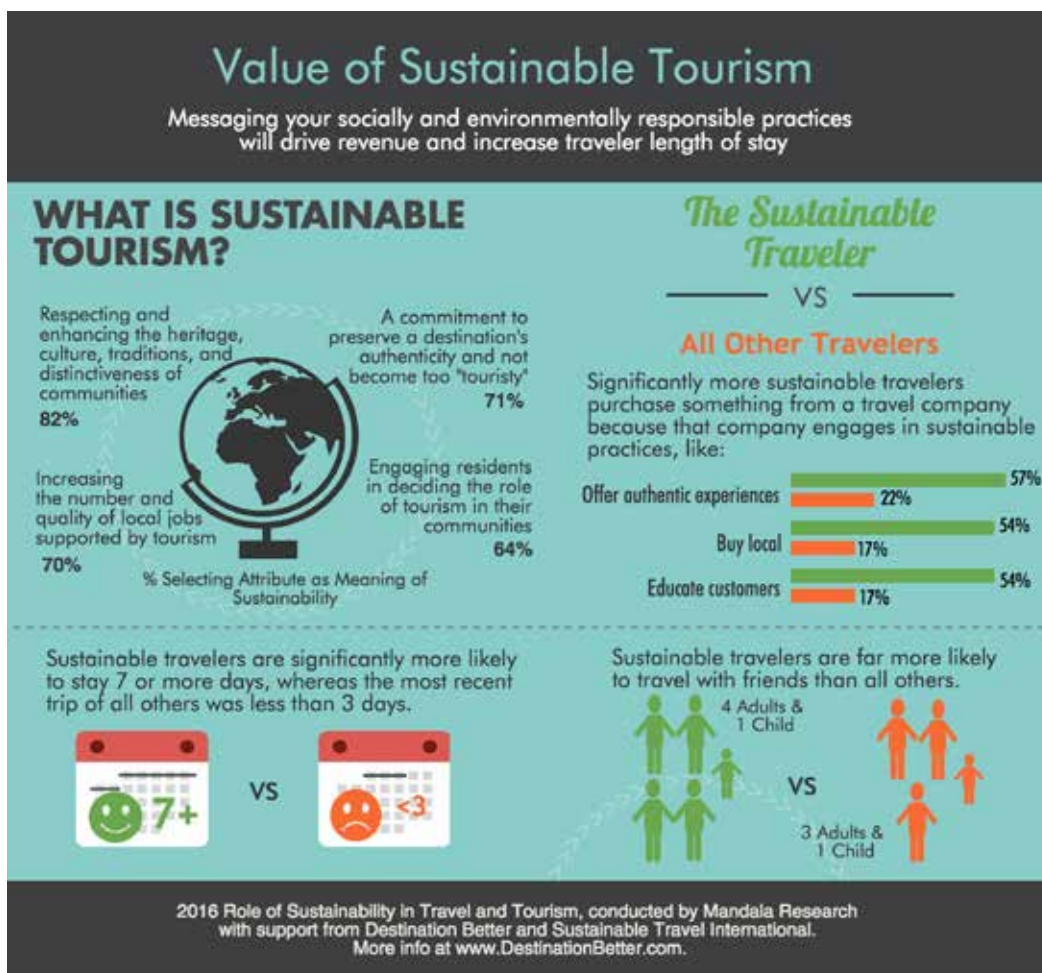
Photo Credit: Snohomish County Tourism Bureau

A key focus for the local tourism industry will need to be the collaborative management of natural and cultural assets, and avoiding potential damage from overuse in popular areas.

3.2.5 EMERGENCE OF SUSTAINABLE TOURISM

Sustainable Tourism is emerging as a major driving force in destination development, especially in the Pacific Northwest. One of the goals of the Strategic Tourism Plan is that Snohomish County will seek to become a premier destination for environmentally and fiscally sustainable recreation and tourism. (Resonance and Berk, 2017). Sustainable Tourism is "Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (UNEP and UNWTO, 2005).

An increasing number of travelers are deciding where to visit based on sustainable practices, and are more likely to visit destinations where they can have an authentic experience of the place, while conserving natural and cultural heritage. Many aspects of sustainable tourism fit well with the ethos and values of Snohomish County.



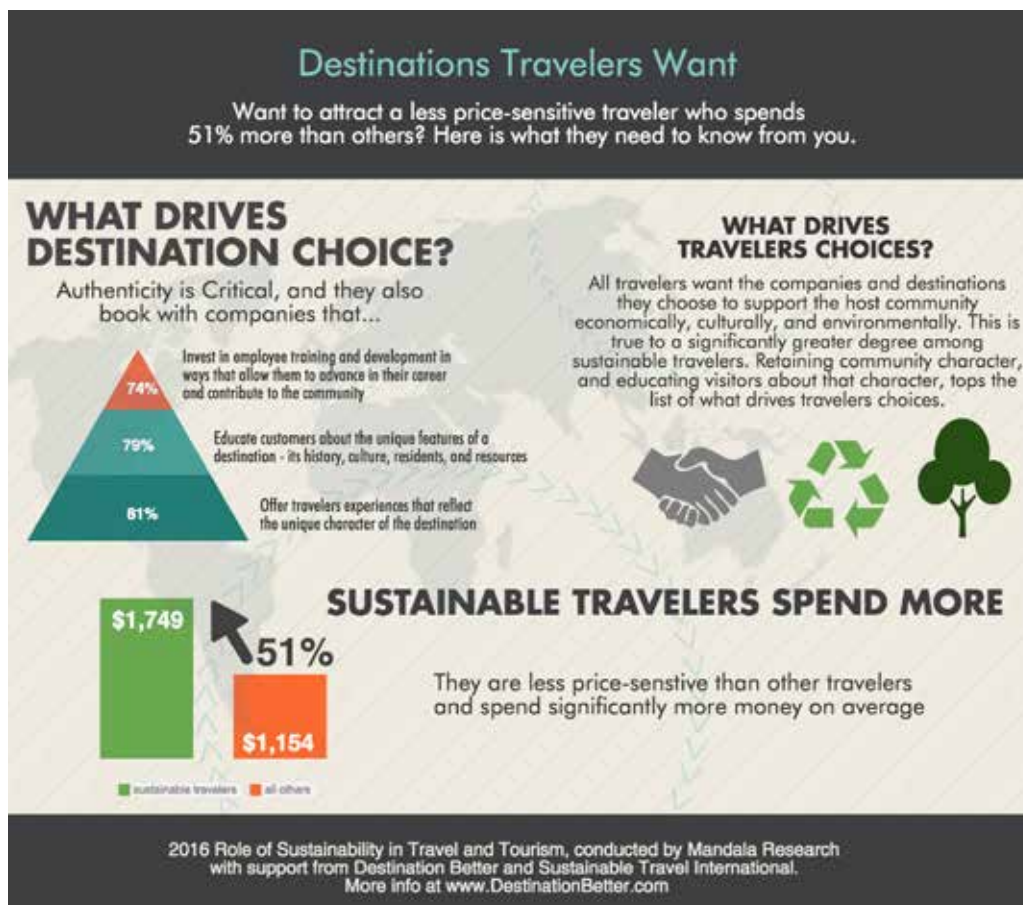


Sustainable tourism principles offer a good guiding framework to support destination development, especially in the rural and coastal areas.

3.2.6 PRINCIPLES OF SUSTAINABLE TOURISM

Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability. Travel Oregon has defined sustainable tourism as being guided by these principles:

1. Is integrated with and respectful of the culture, homeland, heritage, and people of a place
2. Provides a unique experience for the visitor
3. Generates localized economic development benefits
4. Has a balancing or beneficial impact on the environment
5. Generates revenue that is invested in conserving and enhancing the unique features of the community
6. Provides an educational experience for the visitor that leaves them enriched and inspired to create positive change at home
7. Encourages diverse parties to work together to create new opportunities and to address common challenges
8. Serves target markets that are profitable, with promising long-term viability





Snohomish County has the opportunity to implement strategies at a regional scale, that represent a contemporary and innovative approach to developing a future-facing sustainable tourism industry.

3.3 IMPLICATIONS FOR SNOHOMISH COUNTY TOURISM

An analysis of past and future tourism industry trends highlights the need to be adaptable and responsive to changing trends. The global and domestic traveler is evolving, and will be more discerning and selective.

Snohomish County is well positioned to adapt and respond. There is either the existence, or the potential, for a quality tourism product or experience to appeal to almost any of the emergent tourist trend. Some of the obvious strengths of the industry are:

- It has a wide range of experiences in a relatively small geographic area. Within a 45-minute drive, a visitor can move from a very modern and sophisticated urban environment, to remote wilderness.
- Close proximity to a massive urban market, and a gateway hub for international visitors.
- The well-established, globally known, Boeing Everett Factory and Boeing Tour. The Boeing Factory is the largest building in the world by volume.
- An enviable 'base-camp' of high quality hotels, restaurants and transportation options.

However, there are some challenges to address. Key amongst these are:

- Sustainable tourism development is a relatively new focus. There will need to be some urgent pursuit of planning and destination management to avert congestion or overuse issues that could degrade some high quality outdoor recreations experiences. This is beginning to be addressed, through approaches such as collaborative river management and trail development.
- Greater connectivity needs to be achieved between portions of the county, in order to help develop new tourism products, and better connect the county into the larger regional destinations options.
- The sharply seasonal nature of the existing industry places significant pressure on resources and can degrade visitor and resident experiences and perception of the tourism industry.



Photo Credit: Wendy Graper

Implementation of the Strategic Tourism Plan will allow the momentum to explore new areas of opportunity within the tourism industry.

3.3.1 AREAS OF OPPORTUNITY

Snohomish County has extraordinary assets and appeals to a range of visitors. Developing the tourism industry will require building up the existing strengths, and expanding on opportunities. Through the process of developing the Strategic Tourism Plan 2018-2022, the following opportunities were identified (Resonance and Berk, 2017):

• Tourism Development Plans

- Capacity Building
- Branding
- Tourism Focus / Identity
- Event & Festival Strategy
- Rural lodging options

• Destination and Product Development

- Cascade Loop (Signature Attraction)
- Mountain Loop Highway
- Harbor / Boating Tourism
- Visitor Experiences / Itineraries
 - Winery, Distillery and Brewery Trails
 - Indigenous Culture, History and Art Experiences
 - Agriculture and Culinary Experiences
 - Mountain Biking / Trail and Road Biking
 - Land and Water Based Trails with Towns of the Trails
 - Arts / Culture / Heritage Festivals, Events and Activities
 - Unique Visitor District Experiences
- Institute of Flight and Boeing Tour
- Aviation District
- Locally Made
- Outdoor Recreation
- Seattle's Backcountry

• Tourism related Infrastructure

- Biking Trails, Facilities, Infrastructure, Amenities and Transport
- Water Trails / Biking Trails / Hiking Trails
- Trails and Trail Town Connectivity, current projects:
 - Proposed water trail for Skykomish-Snohomish River Valleys
 - Centennial Trail, (Snohomish to Skagit Line)
 - Centennial Trail Southern Extension (Snohomish to Woodinville)
 - Interurban Trail
 - The Whitehorse Regional Trail (Arlington to Darrington)
 - Eastern Trail Extension (Snohomish to Monroe) and Southern Extension (Monroe to Duvall)
 - Western Trail Extension (Snohomish to Lowell/Everett)
 - North Creek Regional Trail (Mill Creek to Bothell)
- Wayfinding
- New Developments / Parks
- Information Centers and Distribution

• Additional Services

- Commercial Air Service
- Visitor transportation
- Food Trucks
- Mobile connectivity/Technology/Social Media



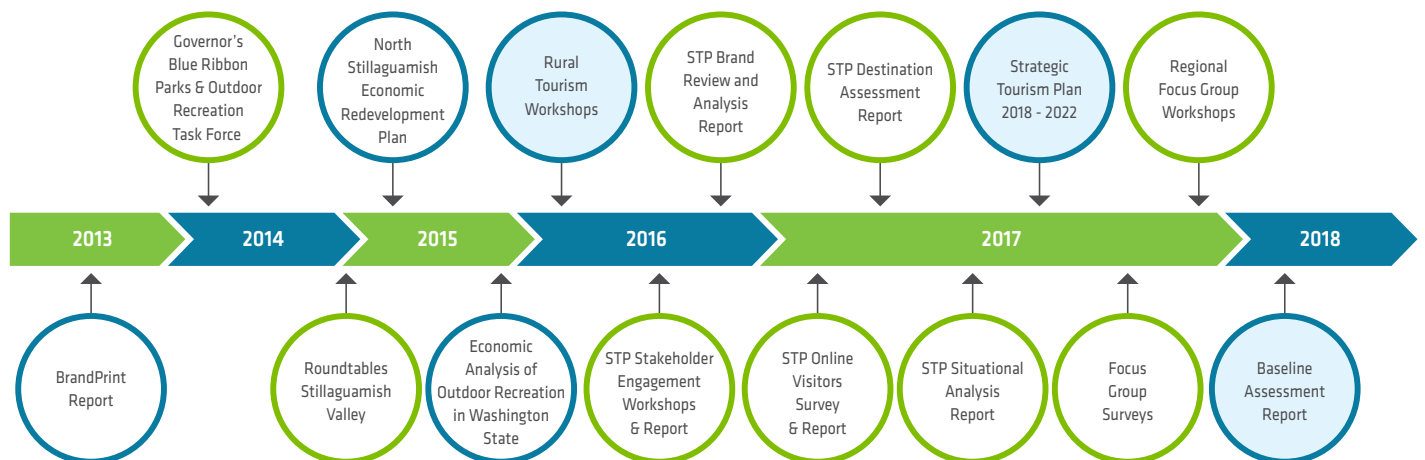
4.0 IMPLEMENTING THE STRATEGIC TOURISM PLAN

The work to develop the Snohomish County Strategic Tourism Plan has been an evolutionary multi-year endeavor. There has been 5 years of methodical work undertaken to build foundational thinking, research and industry support. In addition, there has been significant work carried out with industry partners to build collaborative approaches.

The thoughtful philosophy underpinning the Strategic Tourism Plan ensures it will build an enduring and sustainable tourism industry.

4.1 TIMELINE AND PROGRESS-TO-DATE

The Snohomish County Strategic Tourism Plan (STP) 2018-2022 has built on the foundation of work completed during the previous plan cycle (2010-2016), and through extensive visitor and stakeholder engagement in 2016 and 2017. This has resulted in the final STP being produced in mid-2017. The focus now is on 'pivoting' to the implementation phase in early 2018.



2018 – The year of implementation. The production of this Regional Baseline Assessment Report represents the final validation check with industry stakeholders. The focus groups associated with the Regional Baseline Assessment Report process allowed an opportunity to confirm the broad strategic direction, and build the framework for implementation in collaboration with key industry partners.



Photo Credit: Snohomish County Tourism Bureau

The Rural Tourism Workshops recognized the strong potential for rural destination tourism in Snohomish County. It has galvanized the industry, especially in the eastern portion of the County.

4.2 HIGHLIGHTS OF RECENT PROGRESS

There are several significant steps that have been taken over the last two years as part of the development of the Strategic Tourism Plan and the implementation of key emergent strategies. Highlights of this work are laid out in this section.

4.2.1 RURAL TOURISM WORKSHOPS

The Rural Tourism Workshops held in 2016 have proven to be a significant step in building a destination development model for the tourism industry in the county. These workshops were developed by the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) and the Snohomish County Tourism Bureau (SCTB), and were modeled on the successful Rural Tourism Studios developed by Travel Oregon. Locally, Pandion Consulting and Facilitation helped design and deliver a series of Rural Tourism Workshops. The workshops combined facilitated visioning, planning sessions, and educational subject area workshops focused on harnessing agritourism, bicycle tourism, outdoor recreation development, principles of adventure travel, ecotourism, and small-town experiences.

Two regions within Snohomish County were identified to conduct this workshop series. Communities in Eastern Snohomish County (Skykomish - Snohomish) make up the first region. The second region consisted of communities in North Snohomish County (Stillaguamish - Sauk).

Outcomes from the Workshop Series

- Raised awareness and understanding of the value of the tourism industry.
- Engaged a cross-section of the community – including civic and business leaders – in a dialogue to identify strengths and opportunities for capitalizing on trends in the tourism industry.
- Sparked enthusiasm in community leaders to contribute to making Snohomish County a premiere tourism destination.
- Connected community and business leaders with resources to help develop new authentic tourism products and leverage local assets.
- Brainstormed new tourism experiences that will sustain or enhance the geographical character of a place - its environment, culture, aesthetics, heritage, and the well-being of its residents.
- Encouraged stimulation of new local business development.
- Fostered positive relationships between community leaders and local government.



The collaborative approach to destination development projects is helping build community supported sustainable tourism projects.

4.2.2 COLLABORATIVE REGIONAL DESTINATION DEVELOPMENT PROJECTS

In the last several years, there have been concerted efforts to build innovative and collaborative regional projects. These projects offer a model for successful implementation of other projects associated with the Strategic Tourism Plan strategies. Examples of regional destination development projects:

- Paine Field Aviation District – A comprehensive Visitor Aviation Wayfinding Assessment, Signage Concept and Implementation Plan for the Aviation Attractions and Museums at Paine Field to increase awareness of five museums and attractions. The project goals included connecting partners, visitors and place. The District signage design concept was inspired by the smaller museums and vintage construction. The final design plan, to be installed in phases has over 60 signs for attractions, roadways and freeway. Next steps include:
 - Paine Field Aviation District Brand - Brand development begins in 2018 by Tangram Design LLC.
 - Aviation District a Feature of the Cascade Loop Scenic Byway
 - Regional Commercial Air Service – Beginning fall of 2018
- Skykomish-Snohomish Rivers Coalition - Since 2015, the Skykomish-Snohomish Rivers Coalition has met on a monthly basis to maximize familiarity with different reaches of the river, explore the diversity of river resources and access sites, and allow different members of the coalition to host meetings. The three-hour monthly meetings have been held in communities up and down 84 miles of river corridor, from Index and Skykomish to Everett, Tulalip and Marysville. Coalition members have worked together for two years to formulate a shared vision and goals; coordinate inventory and mapping; identify key considerations and opportunities; and conduct community outreach. Next steps in 2018 include:
 - Skykomish-Snohomish Comprehensive Wayfinding Signage and Interpretive Assessment of the 84 mile rivers system.
 - Priorities for the project include river safety and educational signage, information about sensitive habitat areas in critical times of year, river town communities and culture and ancient heritage aspects of the Rivers Valleys





The close alignment and co-location of SCTB and SCPRT will enhance synergy. The dual collaborative approach to destination marketing and development is an exciting step for the local tourism industry.

4.2.3 ALIGNMENT BETWEEN SCTB AND SCPRT

Part of the evolution that has been occurring is organizational alignment. Both the Snohomish County Tourism Bureau (SCTB) and the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) have staff and resources that provide key roles in developing the local tourism industry. There have been significant moves to enhance the alignment between these two groups, as a prelude to the development and implementation of the Strategic Tourism Plan.

Key steps that have recently been taken in preparation for 2018 implementation include:

- Re-location of the Snohomish County Tourism Bureau (SCTB) to the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) Administrative Offices, in January 2018.
- A new Regional Tourism Projects Coordinator and Tourism Projects Assistant (limited term) added to the SCPRT Destination Development team in late 2017.
- Selection of Regional Destination Development, Marketing and Promotions Consultant Team in process for 2018/2019 to support the development of a regional approach.
- Selection of Wayfinding and Interpretive Assessment for Skykomish-Snohomish Rivers Consultancy in process for 2018.
- Skykomish-Snohomish Rivers Recreation, Concept Plan Draft completed.
- Marketing campaigns for Seattle's Backcountry deployed in 2017 by SCTB.
- Marketing Programmatic and Marketing Creative firm selected for 2018 implementation.





4.3 PROGRESS MADE TOWARDS MEETING OBJECTIVES 2010-15

The 2010 Snohomish County Tourism Strategic Plan outlined a course of action for five years from 2010 to 2015. The Performance Goals for the 2010 Strategic Tourism Plan included:

- Stronger Tourism Brand and Marketing Strategy
- Anchor Clusters and Anchor Attractions Focus with Strong Cross-Promotional Efforts
- Rich Network of Sustaining Clusters and Sustaining Assets
- Stronger County Tourism Infrastructure
- Enhanced Organizational Capacity
- Tourism Funding Resources Align with Strategic Goals
- Goal and Strategy Summary Review

During the preparation of the 2018-22 plan, there was a review of the 2010-2015 Strategic Tourism Plan strategies to look at the progress of each strategy over the period of the plan (Resonance and Berk, 2017):

- Overall, good progress has been made on the majority of strategies and their tasks over the past years with ongoing and continuing work.
- Only a few strategies and tasks have not been started. Strategy 18 (Improve public transportation options to enhance access to tourism assets) has not been started due to the need for cooperation and interest of actors beyond the means and control of the Snohomish County Department of Parks, Recreation and Tourism.
- Most strategies were viewed as having a positive impact on tourism development in the county.
- County-wide hiring freeze delayed hire of Strategic Tourism Plan Coordinator until April 2014. As a result, it is estimated that only 54% of the total planned budget was actually spent to implement the strategies and tasks. The total planned budget to implement the plan from 2011 - 2015 was \$2.2 million. Estimated actual expenditures for 2011 - 2016 was \$1.2 million.

There was good progress made to implement the 2010-15 Strategic Tourism Plan. This provides a solid foundation for this next phase of implementation in 2018 -22.



4.4 RECOMMENDED FUTURE ACTIONS AREAS

The 2018-2022 Strategic Tourism Plan is oriented around the following major areas of work and responsibility:

- Destination Marketing, Promotion, Visitors Services
 - Building tourism demand through efficient and effective marketing led by the Snohomish County Tourism Bureau (SCTB).
- Sustainable Destination and Product Development
 - Building a quality tourism experience (supply) through a focus on infrastructure, product and operations of the destination led by the Snohomish County Department of Parks, Recreation and Tourism (SCPRT).
- Implementation Framework, Protocol and Funding
 - Organizational coordination and leadership by providing guidance and cohesion for a number of stakeholder groups, and to break down silos that limit the industry's potential impact.

The integration of Destination Marketing and Sustainable Destination Development strategies is an exciting evolution in the regional Tourism Plan.

The following table presents the action areas and topics included in the 2018-2022 Strategic Tourism Plan. These are grouped in the areas defined above.

Destination Marketing and Promotion

Marketing, Promotion and Advertising
Branding
Tourism Research
Website and Social Media Engagement
Public Relations and Communications
Meetings, Conventions and Groups Marketing and Sales
Sporting Events Marketing and Sales
Visitor Services
Collateral Materials
State-wide Cooperation
Industry Education

Sustainable Destination and Product Development

Product Development, Marketing and Promotion
Regional Bike Trail Network, Facilities, Infrastructure, Amenities and Transport
Trails and Trail Town Development
Visitor Capacity Planning / Traffic / Transportation
Mobile Connectivity and Open Data
Visitor Wayfinding
Lodging and Facility Options
Aviation District and Commercial Air Service
Events & Festivals
Seasonality
Infrastructure Investments/Gaps

Implementation Framework, Protocol and Funding

Organizational Capacity and Alignment
Snohomish County Department of Parks, Recreation and Tourism (SCPRT)
Snohomish County Tourism Bureau (SCTB)
Snohomish County Lodging Tax Advisory Committee (LTAC)
Snohomish County Tourism Promotion Area (TPA) Board
Lodging Tax Program/Project Funding
Strategic Tourism Plan and Annual Action Plans



4.5 BENCHMARKS TO MEASURE FUTURE PERFORMANCE

The Strategic Tourism Plan 2018-2022 has set flexible performance goals which includes:

- Grow visitor expenditures in Snohomish County, as reported by Dean Runyan and Associates, at the rate of inflation plus 2% annually.
- Increase the number of attendees, overnights and spending associated with group meetings and sporting events hosted in Snohomish County by 2% annually.
- Increase average events booked for the off-season months of October - April by 2% annually.
- Increase and then maintain funding for Snohomish County Tourism Bureau at a level that is competitive with similarly sized Washington State destinations such as Spokane, Tacoma and Tri-Cities.
 - Fully staff the SCTB with full-time destination marketing professionals to oversee and implement the marketing, advertising, social media and media relations.
 - Fully staff the SCTB with a full-time brand and stakeholder relations team to implement the regional branding initiatives, community outreach, collateral development and integration with online and print promotional packaging.
- Increase the value of earned media by 5% annually.
- Increase website traffic and social media engagement by 2% annually.
- Increase VIC traffic by 2% annually at mobile and brick-and-mortar locations.
- Increase tourism business social media presence and engagement throughout the county by 10% annually as measured by the number of (4 or 5 star) TripAdvisor and Yelp reviews.
- Increase stakeholder awareness and sentiment regarding Snohomish County's tourism contribution and impact as measured by an annual survey.
- Fully staff and deploy a sustainable destination development office under Department of Parks, Recreation and Tourism (SCPRT) to manage and organize Snohomish County sustainable destination development efforts.

The flexible performance goals set an ambitious agenda for the implementation of the Strategic Tourism Plan.

Benchmarks are also included for each strategy in the Strategic Tourism Plan 2018-2022.



5.0 IMPLEMENTING REGIONAL DESTINATION DEVELOPMENT

The factors and trends laid out in this Regional Baseline Assessment Report reinforce the validity of the proposed approach to implementing the Strategic Tourism Plan. This includes:

- Destination Marketing, Promotion and Visitor Services – reaching existing and potential markets to inform and engage them to experience the unique Snohomish County experiences.
- Sustainable Destination and Product Development – creation of products to meet the needs of existing and new markets, and carefully avoiding overuse and exploitation.
- Convening Industry – developing structures and mechanisms within the industry for effective planning, decision making and implementation.

This approach reflects the best-in-class approach to regional sustainable tourism development. These pillars have been developed and implemented by Travel Oregon's successful and award-winning approach. Snohomish County is wisely learning from these early pioneers and building a similarly focused tourism development model.

In total, approximately 100 industry stakeholders attended the focus groups. These discussions helped to validate the proposed strategic framework and build the foundation for implementation.

5.1 INDUSTRY FOCUS GROUP WORKSHOPS

As part of the preparation of the Baseline Assessment, four industry focus groups were conducted across the region. These sessions aimed to provide an important validation step, and to work with industry to lay-down the foundations for implementation in 2018.

The focus group sessions were held at:

- Stillaguamish-Sauk River Valley Communities (Arlington, Oso, Darrington, Mountain Loop Highway, Granite Falls) - Thursday, Nov. 30, 2017
- Skykomish-Snohomish River Valley Communities (Snohomish, Lake Stevens, Monroe, Sultan, Gold Bar, Index, Skykomish) - Thursday, Nov. 30, 2017
- Coastal Communities (Edmonds, Mukilteo, Everett, Marysville, Quilceda Village, Stanwood/Camano, Silvana) - Friday, Dec. 1, 2017
- Urban Hub Communities (Lynnwood, Bothell, Mill Creek, Mountlake Terrace) Friday, Dec. 1, 2017

The stated purpose of the focus group sessions was to:

- Build the bridge between the Strategic Tourism Plan and the next phase of local and regional implementation actions.
- Create an opportunity for industry stakeholders to engage in a meaningful discussion about a roadmap for developing the local and regional tourism industry.

Additionally, a 'Core Stakeholders Workshop' was held on December 15, 2017 for interested industry representatives. Approximately 60 people attended this workshop to review the outcomes from the focus group sessions.



Stakeholders viewed all the proposed strategies as significantly important, and as only being partial developed. All the strategies are therefore considered valid and important for the industry.

5.2 VALIDATING THE PROPOSED STRATEGIES

As part of the preparation for the focus group workshops, industry stakeholders were asked to complete a survey to explore their reaction to the range of proposed strategies defined in the Strategic Tourism Plan.

The questions in the survey examines stakeholder's perception to each strategy based on:

- How important they perceived that strategy;
- How well developed that strategy was within their region;
- How quickly they believed that strategy should be implemented.

The data from these surveys is available online at the 'project portal' <http://lab.future-iq.com/snohomish-county-regional-destination/> This portal allows the user to filter the data to look at variations between various cohorts of respondents.





Understanding regional priorities will help create customized regional destination development programs in 2018.

5.3 RANKING THE PROPOSED STRATEGIES

In the survey, industry stakeholders were also asked to rank the proposed Strategic Tourism Plan strategies. The question posed was: 'Thinking of the tourism industry across the WHOLE of Snohomish County, please rank the following strategies, in terms of which you think will produce the biggest positive impact for the whole industry. The order is from 1 = highest impact; 11 = lowest impact.'

While the overall survey response numbers are relatively low (n=70), they represent important and experienced industry stakeholders, and a good cross section of the regional industry. Highlights from this preliminary ranking analysis includes:

- Overall, there is consistent top support for the overarching strategy of 'Sustainable Regional Destination Development and Promotion'
- The rural and small-town respondents have quite different priorities to the urban locations, with lodging and regional trails being much higher in the ranking
- Urban and regional center respondents perceive that visitor capacity planning as being much more impactful

This chart is available online at the 'project portal' <http://lab.future-iq.com/snohomish-county-regional-destination/>

The filters on the right-hand side allow examination of responses of various cohorts of respondents.

Ranking of Strategic Tourism Plan Strategies, Based on Potential Impact





Focus group participants expressed a remarkably high level of optimism about the future of the tourism sector, and the ability of the Strategic Tourism Plan implementation to make a major positive impact.

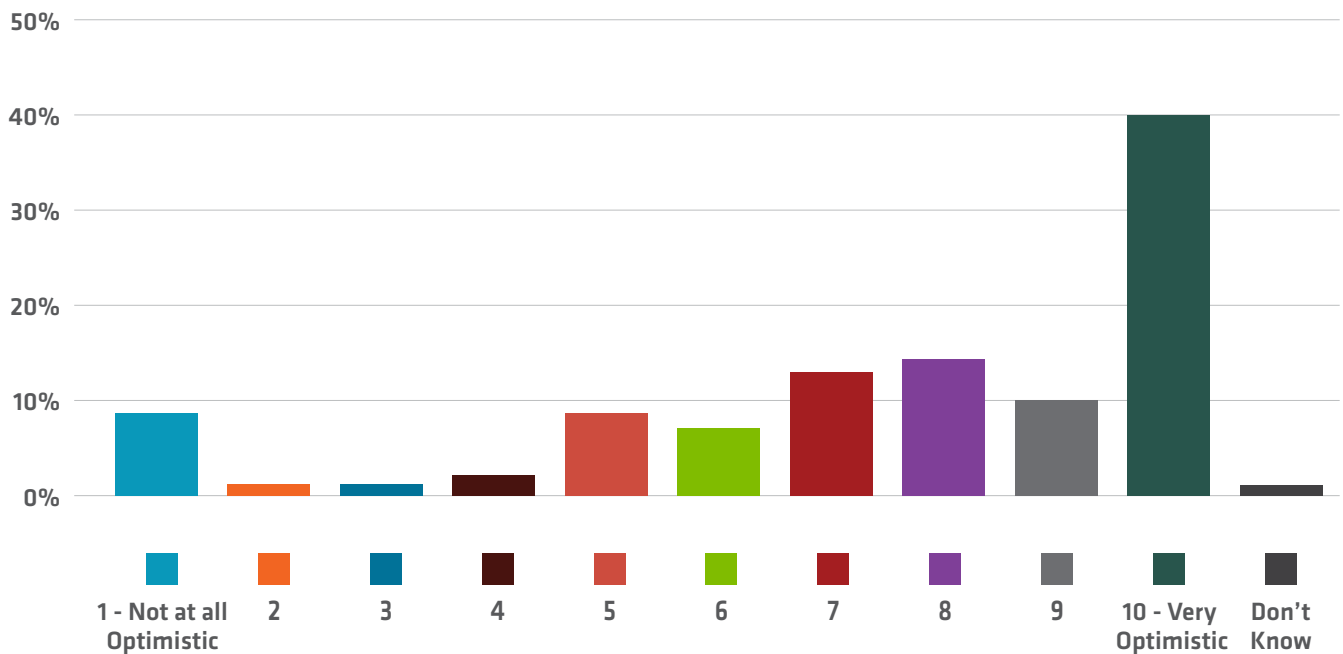
5.4 OPTIMISM ABOUT THE STRATEGIC TOURISM PLAN

At the focus group sessions (November and December 2017), participants were asked a series of questions about their optimism for the tourism industry, and the potential impacts of the Strategic Tourism Plan.

Highlights from this preliminary optimism analysis includes:

- Focus group participants perceived that industry stakeholders and communities across the regions are well prepared and organized to capitalize on a growing tourism sector.
- There are very high levels of optimism about the potential for tourism development in all the regional areas.
- Stakeholders believe the implementation of the Strategic Tourism Plan can have a big positive impact on the tourism sector over the next 5 years.

Question: Overall, how optimistic are you about the ABILITY OF THE STRATEGIC TOURISM PLAN to move the tourism industry forward in Snohomish County? (Scale: 1 = Not at all optimistic; 10 = Very optimistic)



Source: Future iQ - Focus Group survey responses, December 2017 (Weighted average 8.11; n=86)



Photo Credit: Snohomish County Tourism Bureau

The agreed-upon regional structure of 'zones of collaboration' is a key building block for the implementation of the Strategic Tourism Plan in 2018.

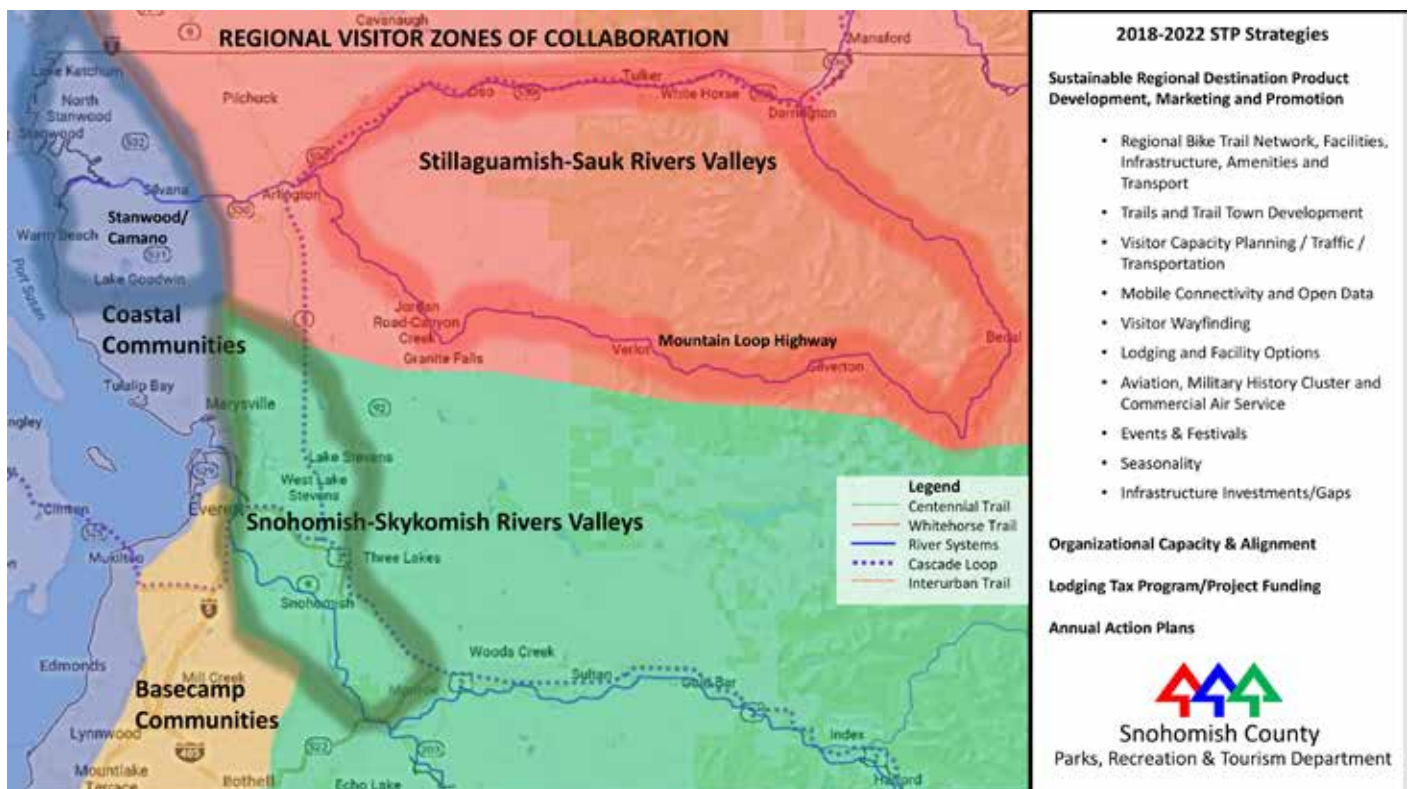
5.5 DEFINING REGIONAL ZONES OF COLLABORATION

A central part of the overall approach to implementing the Strategic Tourism Plan (STP) in 2018, is taking a regional destination approach. This is an important underpinning philosophy that defines the STP.

Working in groups of five to eight stakeholders, workshop participants were asked to 'Identify what you believe are the most natural regional boundaries in the county, from a tourism development and visitor perspective?' They were able to both draw on maps and record their responses in narrative form. The final combined map was produced and validated at the Core Stakeholder Meeting. This map defines four major 'zones of collaboration', which were viewed as the logical building blocks for regional destination development and marketing, both from an industry and visitor perspective. These zones of collaboration are defined with working titles as:

- Coastal Communities
- Stillaguamish-Sauk River Valley
- Snohomish – Skykomish River Valley
- Basecamp Communities

Within each major zone, there are other identifiable sub-regional locations. The boundaries are not intended to be hard lines, but more defining broadly agreed logical 'zones of collaboration'.





5.6 IMPORTANCE OF USING A REGIONAL APPROACH

At the focus group sessions (November and December 2017), participants were asked a series of questions about their perception of the importance of a regional approach to tourism development and marketing in the county.

Highlights from this analysis includes:

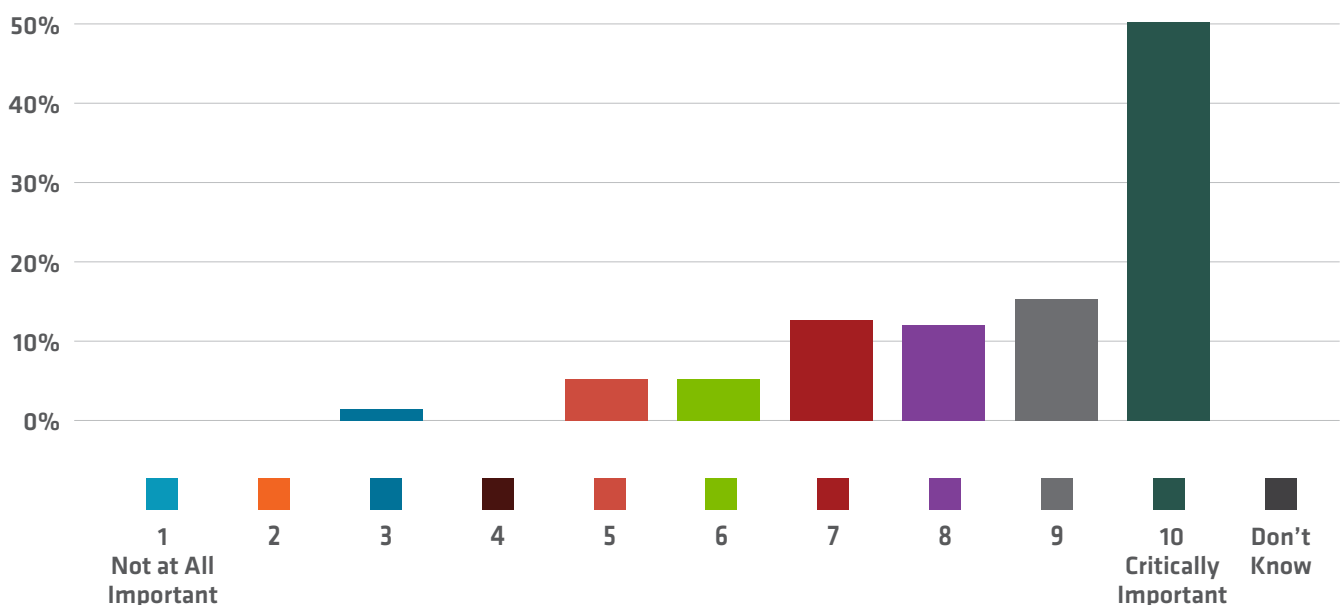
- There is very strong support for the proposed regional approach.
- Industry stakeholders believe this offers great opportunity to collaborate in logical groups to build their regional destinations and create unique customized visitor experiences.
- Each region began to identify elements of the 'visitor experience' that would make their region unique.

The high level of support for the regional approach appears to be driven by two main factors:

- The positive outcomes people have observed and experienced from previous regional work, such as the Rural Tourism Workshops and regional trail projects.
- The considerable excitement about the potential to develop and market unique regional packages of experiences, that can focus on local strengths like coastal experiences or wilderness experiences.

Focus group participants expressed very strong support for the regional approach. They perceive this is a strong model to build local sustainable tourism products and experiences.

Question: How important do you think the REGIONAL APPROACH is to successfully move the tourism industry forward in Snohomish County? Scale: 1 = Not at all important; 10 = Critically important



Source: Future iQ - Focus Group survey responses, December 2017 (Weighted average 8.71; n=86)



Building connectivity between the emerging regions will need to be a central part of the implementation process. This connectivity will drive innovation and shared value.

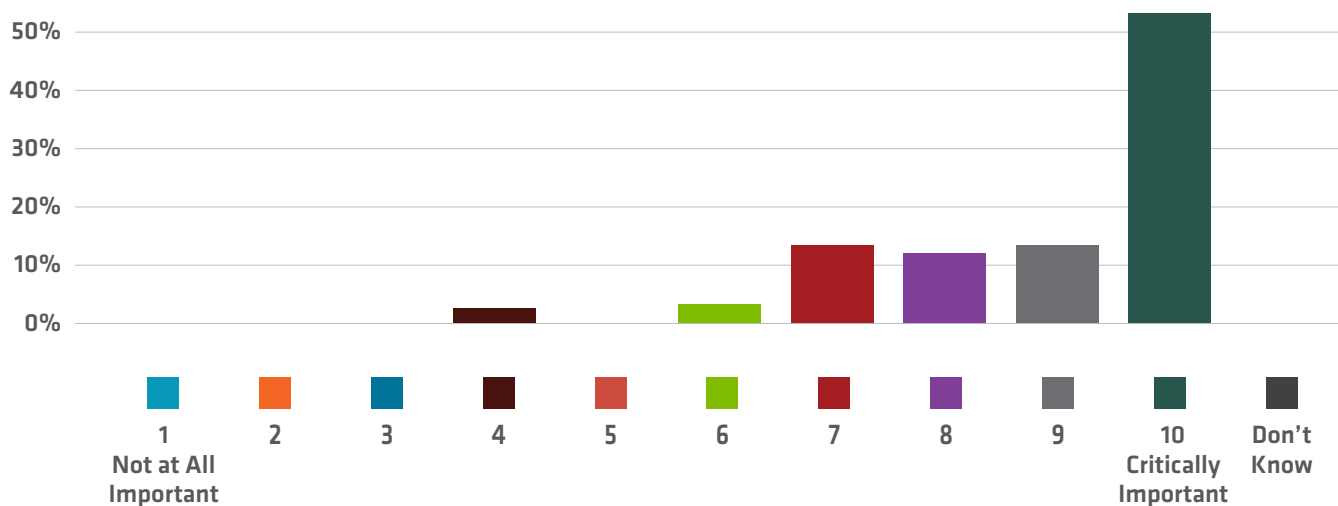
5.7 IMPORTANCE OF CONNECTING ACROSS REGIONS

At the focus group sessions (November and December 2017), and at the Core Stakeholder meeting (December 2017), participants explored how to build connectivity across the proposed regional zones of collaboration. Highlights from the discussion and analysis includes:

- Stakeholders strongly support the regional approach, but believe just as strongly that there should be strong connectivity between the regions.
- Stakeholders repeatedly described Snohomish as a 'land of loops', highlighting the unique trails and destination loops being developed in the valley areas and coastal communities.
- The connectivity between regional areas plays to the strengths of the diversity in the county, where a visitor could stay in a sophisticated high amenity urban location, and in one day journey out to unique wilderness, and then loop back to the 'basecamp'.
- The repeated view was that building the connectivity is a win-win, and helps enrich the visitor experience. It also provides a way to 'steer' or manage visitor traffic flow, thereby spreading economic impact and enhancing visitor impact, both of which are elements of sustainable tourism principles.

In order to foster collaboration and connectivity between regions, it was viewed as important to create strong communication methods, convene stakeholders and proactively build traveler itineraries which link the regions together. It was seen as an opportunity to proactively marketing the unique feature of having such a variety of experiences packed into a small geographic area.

Question: How important do you think it is to CONNECT the tourism industry across the different regions and locations in Snohomish County? Scale: 1 = Not at all important; 10 = Critically important



Source: Future iQ - Focus Group survey responses, December 2017 (Weighted average 8.90; n=86)



In total, nearly \$6.5 million in Lodging Taxes are re-invested in Snohomish County each year. The funding model may need to evolve over time to create greater flexibility.

5.8 FUNDING MODEL AND DISTRIBUTION

Funds for implementing the activities to support the Strategic Tourism Plan implementation comes primarily from County Lodging Tax and Tourism Promotion Area (TPA) assessments. The County Lodging Tax Fund is a dedicated fund authorized by state and county statute that taxes hotel and motel overnight stays and uses the receipts for the purpose of developing and promoting tourism in Snohomish County. A portion of this is called the 'Small Fund' and is available for grants to tourism purposes. In 2017, a total of \$427,425 was collected in the "Small Fund" for awarding in 2018. TPA's have established geographic boundaries, within which lodging establishments can choose to assess, as a group, an additional fee on each room-night of lodging they sell. In 2017, some \$640,693 was awarded from the TPA funds. In addition, some communities have their own Local Lodging Tax Funds. In 2017, some \$2,351,842 was collected as Local Lodging Tax. There are a number of local Lodging Tax Advisory Committee (LTACs), each with their own funding priorities to drive tourism in their communities

However, the funds are not evenly collected or distributed. This reflects the density of lodging establishments. Looking forward, there may need to be consideration as to how the overall funding model could best evolve, to support regional destination development and marketing.

Example: The distribution of 2017 County and Local Lodging Tax Funds collected:

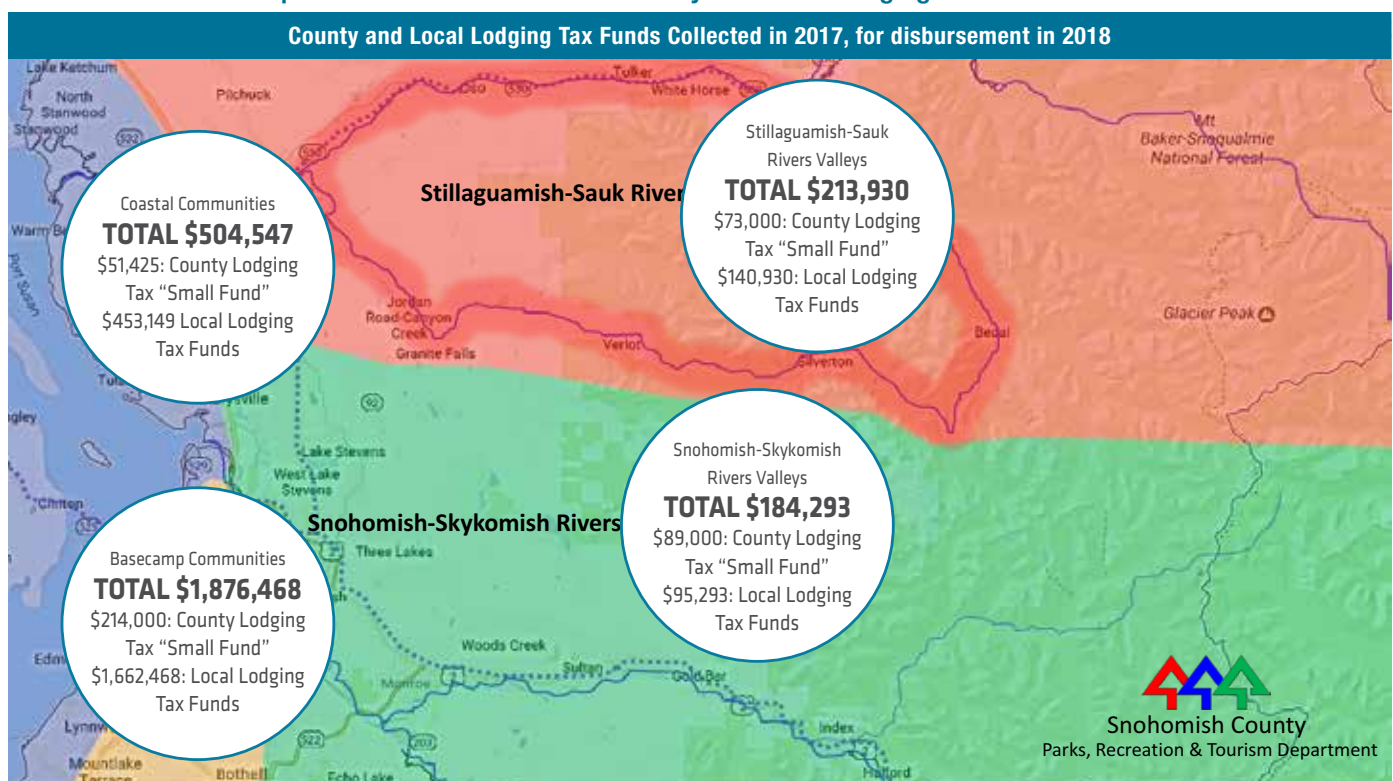




Photo Credit: Snohomish County Tourism Bureau

*2018 is the year of
implementation.*

6.0 CONCLUSIONS

Snohomish County has extraordinary tourism assets that will appeal to a wide range of visitors. It has a remarkably unique set of experiences, packed into a relatively small geographic base. These factors, combined with the close proximity to a major modern metropolis, creates a compelling destination development story.

As has been stated, the work to develop the Snohomish County Strategic Tourism Plan (2018-2022) has been an evolutionary multi-year endeavor. There has been some five years of methodical work to build the foundational thinking, research and industry support. In addition, there has been significant investment of County and industry funds in tourism development, and to build internal capacity and organizational structures. This work should be applauded. It has built the strong foundation on which the strategies can now be implemented.

This Regional Baseline Assessment Report, and the associated industry surveys and focus group workshops, represent the pivot from planning to implementation. The work undertaken in November and December 2017, begins the implementation and has affirmed the following:

- There is a high level of industry support and optimism about the tourism industry future, and the positive role the Strategic Tourism Plan can play.
- Foundational strategies identified in the Strategic Tourism Plan have been validated by the industry stakeholders.
- The focus on a sustainable tourism development approach is strongly supported.
- A regional approach to destination development and marketing is universally favored by the industry. This approach is perceived to offer great merit, in being able to create local innovation and collaboration, and promote the unique assets and character of each regional area.
- Connecting the regional work together, into a cohesive county-wide industry approach is equally favored. This can naturally be extended to a broader multi-county approach as implementation gathers traction.
- Local leadership groups need to be established from industry and community stakeholders, to help guide and encourage the evolution of the regional approach.
- The county and industry has an adequate funding model and significant resources to deploy in initial implementation. However, the funding model will need to evolve over the coming years to create additional flexibility, to adapt to changing priorities.

The tourism destination and marketing development approach has a solid foundation, and the industry stakeholders are enthusiastic to get to work on local implementation.

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8.0 ACKNOWLEDGMENTS AND CREDITS

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In particular, the following people are specifically acknowledged:

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- Angie Riley, Marketing & Communications Manager, Snohomish County Tourism Bureau, for skilled support in map production and project planning.

The teams from these two key organizations contributed outstanding support to the focus group workshops, and helped facilitate and lead portions of important stakeholder discussions. In addition, Snohomish County Tourism Bureau provided access to their extensive photo collection.

The tourism industry in Snohomish County engaged in the workshop and discussions with gusto. Their passion and interest ensured the discussions were thoughtful, and the outcomes worthy. In particular, the contingents of stakeholders who travelled to the workshops from the more remote corners of the County are acknowledged for their deep commitment to the future of their communities and local industries.

The dedication and professionalism of the staff at Snohomish County Tourism Bureau (SCTB) and Snohomish County Department of Parks, Recreation and Tourism (SCPRT) is a big asset for the region's tourism industry.



9.0 ABOUT FUTURE IQ

Future iQ specializes in applying innovative tools and approaches to assist organizations, regions and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents. To learn more about Future iQ, and our recent projects visit www.future-iq.com or by email at info@future-iq.com

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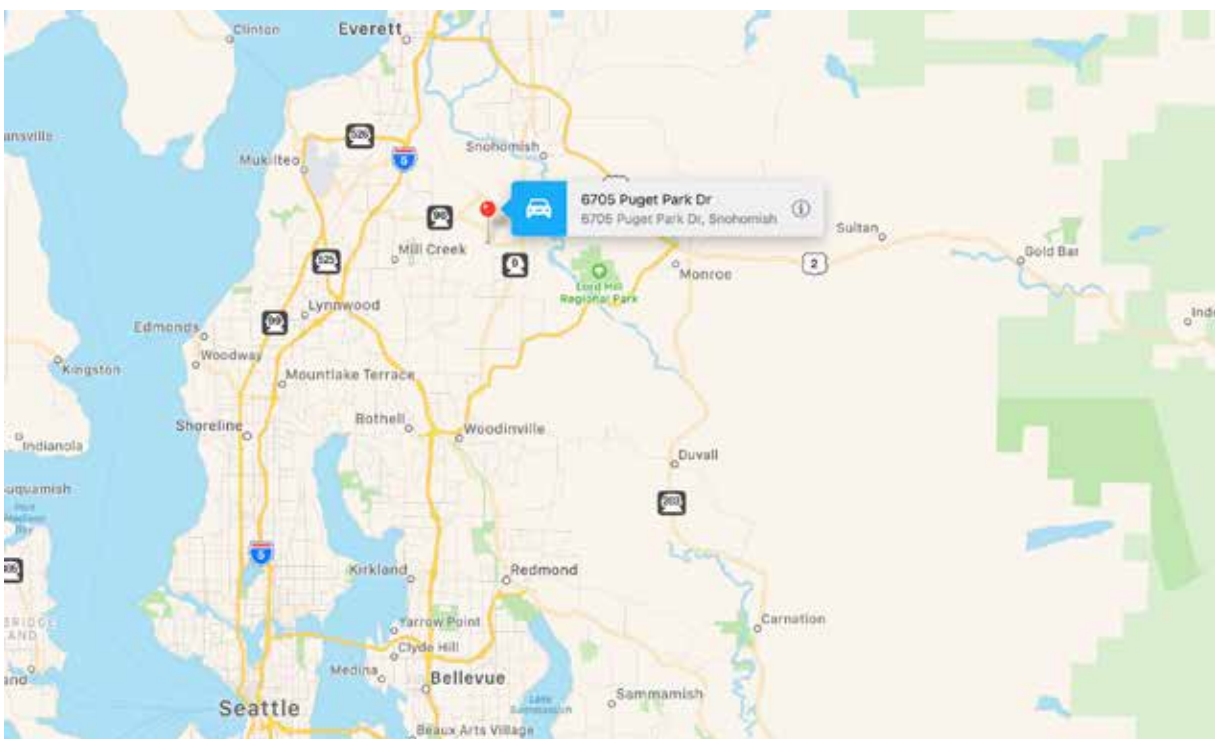
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